

# Financial Transaction System (FiTS) – Internal Purchase Funding Transfers

The Internal Purchase Funding Transfer (IPFT) module of the Financial Transaction System (FiTS) allows departments to transfer funds from one fund to another for professional services, continuing professional education, and other internal purchases of goods or services that are not in the normal course of business.

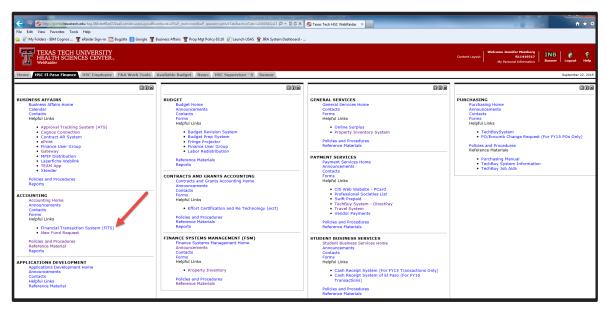
After review and approval, the system will post the IPFT to Banner. Departmental approval, functional review, and final approvals are managed through FiTS. Transaction tracking, archiving, and retrieving of information related to the IPFT is managed within the system as well.

FiTS replaces the IPFT Form that is normally submitted to Accounting Services.

FiTS allows a departmental user to do the following:

- Start an IPFT request
- Resume completion of an IPFT request
- Submit an IPFT request to approvals
- Approve, Reject, or Delete an IPFT request
- Review the Status of an IPFT request
- Review the History of an IPFT request

FiTS can be accessed from the WebRaider portal, HSC El Paso Finance tab, under Accounting.



TTUHSC El Paso Finance Systems Management



# **Creating an IPFT**

To begin an IPFT, click on the "Create IPFT" tab at the top of the webpage.

TEXAS TECH UNIVERSITY SYSTEM	TEST   V5.0114   Jillian Townsen	d   Texas Tech University   Sign Out
Welcome to FiTS Create Cost Transfer Create IV Create Revenue JV Create IPPT Status History	Session inactive for 0 minutes Remaining time is 35 minutes	
Welcome to FiTS         The Financial Transaction System         . Cost Transfers         Allows departments to move current fiscal year expenditures between departmental FOAPs         . IVS         Allows Service departments to all expenditures to departmental FOAPs         . VS         . Uvs         . Uvs		
Contact Information: • TTU For policy related questions regarding FiTS, please contact Financial Services and Tax at htgtw.edu. For training related questions about FiTS, please contact AFISM at <u>sima.Xnowgtw.edu</u> . • TTUHSC For policy related questions regarding FiTS, please contact Accounting Services at <u>heacegtubsc.edu</u> . For training related questions about FITS, please contact Finance Systems Management at <u>tangtubsc.edu</u> .		

Begin each IPFT by selecting "E" from the "Chart" drop down box.

TEXAS TECH UNIVERSITY SYSTEM	TEST   VS.0117   Jillian Townsend	Texas Tech University
Welcome to FITS Create Cost Transfer Create IV Create Revenue JV Create IPFT Status History	Session inactive for 6 minutes Remaining time is 29 minutes	
Step 1 - IPFT   Step 2 - Questions Allachments Comments   Step 3 - Finish		
Internal Purchase Funding Transfers		
Purchase Transfer Id		
Purchase Transfer In	100	
Total Transfer In		
CHART FUND ORGN ACCT PROG AMOUNT DESCRIPTION		
H • Add Clear		
T Mer Out	141	
Total Transfer Cut :		
CHART FI Select "E" AMOUNT DESCRIPTION		
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After selecting "E`" in the "Chart" drop down box under the "Purchase Transfer In" section, continue by entering the Purchase Transfer In Fund-Orgn-Prog (FOP) of the department receiving payment for the professional services, continuing professional education, and other internal purchases of goods or services.

TEXAS TECH UNIVERSITY SYSTEM	CI   VS.0118   Jillian Townsend   Texas Tech	s University   Sign Out
Welcome to FO Step 1 - IPFT Enter Transfer In FOP	Session inactive for 0 minutes Remaining time is 35 minutes	
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Purchase Transfer Out Total Transfer Out :		
CHART FUND ORGN ACCT PROG AMOUNT DESCRIPTION		

Since FiTS auto-populates the appropriate Account codes for the transaction being entered, manually entering Account codes is not necessary.

When the Purchase Transfer In FOP has been entered, enter the amount of the payment to be transferred and a description that states the period of service or reference to departmental agreement. The description line is limited to 35 characters and will appear on the ledgers.

Click the "Add" button after all required information is entered to save your progress.

TEXAS TECH UNIVERSITY SYSTEM		Ct   V5.0118   Jillian Townsend   Texas Tech University
Enter the Amount to be Transferred In	Enter the Description	Click " <b>Add</b> " to save progress
Produse Transfer to Perchase T		
Total Transfer in:         Amount           CHART         FUND         ORGN         ACCT         PROG         AMOUNT           H         -         181034         201131         60         60	T DESCRIPTION 500 Test IPFT Add Clear	
Purchase Transfer Out Total Transfer Out :		
CHART FUND ORGN ACCT PROG. AMOUN	T DESCRIPTION	



Once the Purchase Transfer In line has been completed, a Purchase Transfer ID (FiTS ID) is assigned. The FiTS ID can be used to track your IPFT throughout the approval process.

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Welcome to FiTS				TITS	ID	History				Session inactive for 4 minutes Remaining time is 31 minutes	
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Purchase Transfer	r ld PT00004	6									
Purchase Transfe	er In										T
Total Transfer in : I	5.00										
CHART	FUND	ORGN	ACCT	PROG	AMOUNT		DESCRIPTION				
н	181034	201131		60	5.00	Test IPFT		Edit	Delote		
Purchase Transfe	er Out										T
Total Transfer Out	0.00										
CHART	FUND	ORGN	ACCT	PROG	AMOUNT		DESCRIPTION				
н	1							Add	Clear		
											= +

When the Purchase Transfer In section has been completed, you can move to the "Purchase Transfer Out" section to enter the FOP of the department to be charged for the service(s) provided.

TEXAS TECH UNIVERSITY SYSTEM		C1   VS.0118   Jillian Townsend	Texas Tech University   Sign Out
Welcome In FITS         Create Cost Transfer         Create IV         Create Revenue JV         Create Revenue JV	nte IPFT Status Hentory	Session inactive for 8 minutes Remaining time is 27 minutes	
Purchase Transfer 14 PT000046	Enter the Description	Click " <b>Add</b> " to save progress	
CHART FUND ORGH ACCT PROG H 191388 201193 522600 60 Enter Transfer Out FOP	AMOUNT DESCRIPTION	Crear	



Selecting "Add" on the Purchase Transfer Out line will notify you of any budgetary errors that may exist in the form of a popup message.

TEXAS TECH UNIVERSITY SYSTEM		C1 ( V5.0118 ) Jillian Townsend ( Texas Tech University )	Sign Out
Winfcomm for P/TB         Creater Coult Transition         Creater IV         Creater IV/TC         Bislaw         History           Step 1 – IVYT         Step 2 – Overshow Atlactments Commercial         Step 2 – Device	Net enough svalable balance bor lung to a opp 201123 The available balance is 20.00	Service healthes to 3 minutes Remaining lines to 30 minutes	
Internal Purchase Funding Transfers	Click OK and then 5x the errors.		
Purchesie Yrandier 10 PT000046	ОК		
Functionse Transition by			
Total Transfer In: 800,00			
CHART         FUND         DRGM         ACCT         PROG         AMOUNT           H         181034         201131         812800         60         500.00         Test IPF1	DESCRIPTION		
Punchase Transfer Out			
Total Tomate Out: 5.00			
CHART FUND ORUM ACCT PROS AMOUNT	DF REHIMINON		
H 191386 201193 H228000 60 500.00 Test PPFT	Save Cancel		

If you receive a budget error, the popup message will indicate that the Purchase Transfer Out FOP does not have enough budget in the 8096 Budget Account Pool. At this time the Purchase Transfer Out FOP may be edited or the IPFT may be set to "Started and will mark Complete later" so a Budget Revision (BR) can be submitted through the online Budget Revision System to budget funds in the 8096 Budget Account Code (BAC) in order for the IPFT to be completed. Once the budget error is corrected, you can continue with the completion of the IPFT.

If the need arises for a line on the IPFT to be edited before submitting to Approvals, certain steps must be taken depending on which line needs to be changed.

To edit the Purchase Transfer Out line, click the "**Edit**" button to the right and make the necessary changes.

Internal Pu	irchase Fu	unding Tra	nsfers								
Purchase Transfe	r Id <b>P T00004</b>	16									
Purchase Transf	er in										
Total Transfer In	5.00										
CHART	FUND	ORGN	ACCT	PROG	AMOUNT		DESCRIPTION				
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TTUHSC El Paso Finance Systems Management



When editing the Purchase Transfer In line, changes to the Fund requires that the Purchase Transfer Out line be deleted. This requirement is due to the system's auto-population of Account codes.

Once the change to the Fund is made, the Purchase Transfer Out line must be reentered and added.

After all required fields have been completed on the "Step 1 - IPFT" tab, select the "Step 2 - Questions Attachments Comments" tab.

TEXAS TECH UNIVERSITY SYSTEM	CI   V5.0118   Jillian Townsend	Texas Tech University   Sign Out
Welcome to FITS Create Cost Transfer Create IV Create Revenue JV Create IPFT Status History	Session inactive for 0 minutes Remaining time is 35 minutes	
Step 1 - IPFT Step 2 - Questions Attachments Step 3 - Finish Internal Purchase Funding Transfers		
Purchase Transfer Id PT000046 Purchase Transfer In		
Production and the stop     Click on the "Questions       Total Transfer in \$5.00     Attachments Comments" tab		
Purchase Transfer Out Total Transfer Out 5.00		
CHART FUND ORGN ACCT PROG AMOUNT DESCRIPTION		
H 191388 201193 922600 .50 5.00 Text IPFT Eat Delate		

On the "Step 2 - Questions Attachments Comments" tab, you must answer all questions with clear and adequate information. There are three standard questions:

- What internal goods or services have been provided?
- Are these goods or services provided to TTUHSC departments on a regular basis?
- Is the rate charged for the goods or services used consistently for all TTUHSC department funds?

A fourth question will appear if the expense to be charged is on a restricted fund (i.e. 22Z, 23, 23Z, 24, and 24Z fund types):

- How is the expense directly allowable and appropriate on this restricted fund?

To add answers to the required questions, click on the "**Edit Answers**" button. Each question requires an answer or the IPFT cannot to be submitted.



TEXAS TECH UNIVERSITY SYSTEM	CI   V5.0118   Jillian Townsend   Texas Tech University   Sign Out
Welcome to FiTS Create Cost Transfer Create IV Create Revenue JV Create IP/T Status History	Session inactive for 0 minutes Remaining time is 35 minutes
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Questions Edi Answers	-
Question Prease attach documentation that supports the anisot steering What internal goods or services have been provided? Are there goods or services provided to TTLiASC department Is the rate charged for the goods or services used consistent Sendo?	
Atschnents	
Usioa Attachment Maximum File Size : 5 MB Allowed file types: csv - doc - docx - pdf - rtf - txt - xis - xisx - xmi	
DOCUMENT NAME DATE ACTION	

After completing all of the required questions, click the "Save Answers" button.

TEXAS TECH UNIVERSITY SYSTEM			CI   VS.0118   Jillian Fownsend   Texas Tech University   🔤 🕬
Welcome to FiTS   Create Cost Transfer   Create IV   Create Revenue JV   C	create IPFT Status History		Session inactive for 7 mm/des Remaining time is 33 minutes
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Questions Attachments and Comments PT000046			
Questions			-
Save Answers Cancel			
Question	Answer		
Please attach occumentation that supports the amount being charged for the good service	lof		<b>^</b>
What internal goods or services have been provided?	Test	^	
Are these goods or services provided to TTUHSC departments on a regular basis		*	
	Test	0	
Click the "Save	ortmant		~
Answers" button			3
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Maximum File Size : 5 MB			
Allowed file types: csv - doc - docx - pdf - rtf - txt - xls - xlsx - x DOCUMENT NAME	DATE ACTION		
CONSTRUCT POINT.	NY N		

If you do not click the "**Save Answers**" button before navigating to another tab, or page, the system will not save your answers and you will lose all the information you have entered.



Below the "Questions" section are the "Attachments" and "Comments" sections. In the "Attachments" section, you must upload an attachment (in one of the allowed file types) to provide documentation that supports the amount being charged for the good or service as noted in the statement in the "Questions" section.

To add a comment, type the text into the box, then click the "**Add**" button to save the comment.

Attachments Upload Attachment Maximum File Size : 5 MB Allowed file types; csv - doc - docx - pdf - rtf - txt - xls - xlsx - DocutesnT NAME	Upload an Attachment	
	Add a omment	

Once you have answered all of the required questions and added the required attachments or provided additional comments, move to the final tab, "**Step 3 - Finish**". The "**Step 3 - Finish**" tab allows you to perform a variety of different tasks. They are:

- Started and will mark Complete later
  - Clicking this button saves your progress but will not mark the IPFT as complete.
  - Once clicked, it will take you back to a blank "Step 1 IPFT" tab to begin a new IPFT if desired.
  - To mark the IPFT as Complete after clicking this option, search for the IPFT in the "**Status**" tab (instructions located below).
- Mark as Complete
  - Clicking this button marks the IPFT as complete in the system, but will not route through approvals.
  - To send the IPFT to approvals after clicking this option, search for the IPFT in the "**Status**" tab (instructions located below).
- Submit to Approvals
  - Clicking this button will send the IPFT to the Approval queues for each fund's TEAM App Financial Manager and Approver(s) and Accounting Services for review, approval, or rejection.



TEXAS TECH UNIVERSITY SYSTEM	CI   V5.0118   Jillian Townser	nd   Texas Tech University   Sign Out
Weicome to FiTS Create Cost Transfer Create IV Create Revenue JV Create IPFT Status History	Session inactive for 0 minutes Remaining time is 35 minutes	
Step 1 - IPFY Step 2 - Questions Attachments Comments Step 3 - Finish		
Finish Process PT000046	_	
Started     Started and will mark Complete later       Complete     Mark as Complete       Approvals     Submit to Approvals		

If you select "**Mark as Complete**", this <u>does not</u> send the IPFT to approvals. In order to send the IPFT to approvals, navigate to the "**Status**" tab and locate your IPFT by the FiTS ID. Once located, select the "**Approvals**" button.

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Welcome to FiTS	5 Create Cos	t Transfer Create IV C	Create Revenue JV   Create IF	FT Status History					Session inact Remaining tir	ive for 0 minutes ne is 35 minutes		
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PT000046	Completed	Jillian Townsend	02/06/2014	Jillian Townsend	Edit	Delete	Approvals	 			elect provals'	.
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After the IPFT is submitted to approvals, the TEAM App Financial Managers or Approvers, along with Accounting Services will have the option to either Approve or Reject the IPFT. If errors or lack of justification are found, the IPFT can be rejected.

In the case of rejection, the IPFT Originator will receive a rejection email notification from ITIS Financial Transaction Entry System. The email will reference the specific FiTS ID that has been rejected with a link that will take you to the "**Step 2 – Questions Attachments Comments**" tab of the IPFT. Scroll down to the "Comments" section to review the rejection reason and comments pertaining to the rejection. To expand the comments, click on the desired comment within the Comment box to review the rejection reason or comments added by the reviewer.

Please attach documentation that supports the amount being charged for the good or service.	Answer			
Edit Answers Question Please attach documentation that supports the amount being charged for the good or enroice.	Answer		-	
Question Place attach documentation that supports the amount being charged for the good or service	Answer			
Question Please attach documentation that supports the amount being charged for the good or service.	Answer			
service				
What internal goods or services have been provided?	Test			
Are these goods or services provided to TTUHSC departments on a regular basis?	Test			
is the rate charged for the goods or services used consistently for all TTUHSC department funds?	Test			
Upload Attachment Maximum File Size : 5 MB Allowed file types: csv - doc - docx - pdf - rtf - txt - xis - xisx - xml DOCUMENT NAME	DATE ACTION			
		(WORK)		
Attachment.docx 02A	06/2014 Open	Delete		
Comments				
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The rejection reason and any comments pertaining to the rejection will be shown in the form of a popup message.

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Phase attack documentation that supports the amount being charged for the good or services. What immunit goods or services have been provided? Test What immunit goods or services have been provided? Test And there goods are services model for TLAIDSC developments on a regular basis? Test			Comment by - A Bomar 29/14 2 29 14 PM PT1- SEE COMMENTS Test Text	
	Please attach documentation that supports the amount being charped for the good or defined. What internal goods or services have been provided? Are these goods or services revised to TTUHISC departments on a regular basis?	Test		



After reviewing the rejection reason and/or comments, modify the IPFT accordingly. After providing the requested information or making the requested changes, click on the "**Step 3** – **Finish**" tab and select the "**Approvals**" button to send the rejected IPFT through the approval process again.

# **Deleting a IPFT**

Only the Originator of an IPFT has the ability to delete an IPFT from FiTS.

In order to delete an IPFT, access FiTS and select the "Status" tab.

TEXAS TECH UNIVERSITY SYSTEM	TEST   V5.0114   Jillian Townsen	d   Texas Tech University   📑 Sign Out
Welcome to FITS Create Cost Transfer Create IV Create Revenue JV Create IPFT Status History Welcome to FITS	Session inactive for 0 minutes Remaining time is 35 minutes	
The Financial Transaction System (FiTS) consists of a modules, which include: <ul> <li>a to Transfer</li> <li>dives departments to move current fiscal year expenditures between departmental FOAPS</li> <li>ive</li> <li>dives departments to bill expenditures to departments of the Status of</li></ul>		

After selecting the "**Status**" tab, the screen will populate with all of the IPFTs that you originated that have not been completely approved and processed or that need your approval (if you are a TEAM App Financial Manager or Approver).

Search for the IPFTS(s) you wish to delete by Fund, Orgn, a date range that the IPFT was last modified, and/or FiTS ID, or by using the forward and back buttons at the bottom of the page.

\*For more detailed instructions on how to use the search capabilities on the "**Status**" page, see page 18 of this training document.

Once the IPFT to be deleted is located, click on the "Delete" button to the right of the IPFT.



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After clicking the "**Delete**" button, the system will ask you, in the form of a popup message, if you are sure you would like to delete the IPFT. If you are sure of your selection, click "**OK**". If not, click "Cancel".

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If the IPFT you have searched for does not have the "**Delete**" button populated to the right, the IPFT does not have the option to be deleted.

If the IPFT needs to be deleted, coordinate with a TEAM App Financial Manager or Approver or Accounting Services to have it rejected in the system.

The approval status can be determined by clicking the "**Review**" button next to the IPFT to be deleted. This list will indicate who has the option of rejecting the IPFT.

pprovals						
T000045				12	11	
APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE	
FROM Financial Manager	TEAM Fund Group	Celeste E Kulinski	Approved	Celeste Kulinski	02/05/2014	
TO Financial Manager	TEAM Fund Group	Carole Kaye Wardroup A Laree Bornar	Approved	A Bomar	02/05/2014	
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin	Approved	Michael Burns	02/05/2014	
TO Accountant	Fund Class Group - H 18	Michael Dane Bums Shannon Leigh Martin	Approved	Michael Burns	02/05/2014	
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Mane Taylor				
TO Accountant Menager	Fund Class Group - H 18	Rebecca Aguitar Angela Marie Taylor				
	Add Approver					

There will be an option to delete the IPFT after it has been rejected. You will need to search within the "**Status**" tab for the FiTS ID to be deleted.

PTs that remain in the "**Status**" tab and have not been modified for 7 days will result in an email to the Originator informing them that the PT will be deleted the following Monday. To prevent the PT from being deleted, the Originator will need to make the necessary corrections before the following Monday.



# **Approving an IPFT**

After the IPFT has been submitted for approvals, the TEAM App Financial Manager and Approver(s) for each Fund included in the IPFT will receive an email notification from ITIS Financial Transaction Entry System informing them that there is an IPFT waiting for their review and approval/rejection. The email will reference the IPFT that has been submitted for approvals by its FiTS ID and will contain the link to the IPFT that needs approval.

After clicking the link provided in the email notification, the TEAM App Financial Manager and Approver(s) will be taken to the "Approvals" tab of the IPFT referenced in the email.

From the "**Approvals**" tab, the TEAM App Financial Manager or Approver can select the "**Step 1 - IPFT**" tab to review the IPFT details or the "**Step 2 - Questions Attachments Comments**" tab to review the responses to the questions provided by the Originator, as well as the required attachments or optional comments.

TEXAS TECH UN	NIVERSITY SYSTEM				CI   V5.0118	3   A Bormar   Texas Te	ch University   Sign Out
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TO Accountant Manager	Fund Class Group - H 18 Add Approver	Rebecca Aguilan Angela Marie Taylo	Click to F Justific				_
Review I							

TEAM App Financial Managers and Approvers can add additional information in the form of an attachment or comment before approving or rejecting the IPFT.

After reviewing the IPFT, TEAM App Financial Managers and Approvers can choose whether to Approve or Reject the IPFT from the drop down box.



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TEAM App Financial Managers and Approvers choosing to approve an IPFT will need to select "Approve" from the drop down box on the "Approvals" tab and then select the "**Save**" button.

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TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor				Select	
	Add Approver					"Save"	

After selecting "**Save**", the system will ask if you are sure you wish to approve the document on all approval levels that are available for your approval.



If a TEAM App Financial Manager or Approver has more than one fund on an IPFT, selecting "Approve" will initiate a blanket approval for all funds that belong to them. If one of the funds needs to be rejected, you must select "Reject" first, or the blanket approval will go into effect and will forward the IPFT to Accounting Services for approval and processing.

	ranster Create IV Create Reve		Approve		×			Session inactive for 0 minu Remaining time is 35 minu
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PT000046				If you need to REJECT at another approval level then do so by				
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If rejecting, a TEAM App Financial Manager or Approver must select "Reject" from the drop down box under the "Approvals" tab. After selecting "Reject" you will be required to select a Rejection Reason and provide an explanation.

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Comments may be added to clarify the reason for rejection or to request additional information from the Originator of the IPFT.

After selecting the Rejection Reason and providing an explanation, click the "**Save**" button in order for FiTS to save your progress.

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After clicking the "Save" button, the system will ask if you are sure you wish to reject the IPFT. If you are, select "Yes". If not, select "No".

T000046								
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REJECTION REASON: Select OF								
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# Searching the Status Tab

The "**Status**" tab can be used to search for any IPFT(s) that have not been completely processed and are pending Completion or Approvals.

To begin, click on the "Status" tab from the home page.

TEXAS TECH UNIVERSITY SYSTEM	TEST   V5.0114   Jillian Townser	d   Texas Tech University   Sign Out
Welcome to FITS Create Cost Transfer Create IV Create Revenue JV Create IPFT Status History	Session inactive for 0 minutes Remaining time is 35 minutes	
Welcome to FitS  The Financial Transaction System (FitS) consists of modules, which include:  Cost Transfers Allows departments to move current fiscal year expenditures between departmental FOAPS  Vis Allows Service departments to bill expenditures to departmental FOAPS  Vis Revenue Journal Vouchers  Allows departments to move current fiscal year revenue  Allows departments to move fiscal year revenue		
Contact Information: • TTU For policy related questions regarding FITS, please contact Financial Services and Tax at Istgtu.edu. For training related questions about FITS, please contact AFISM at alsm.2knowgtu.edu. • TTUHSC For policy related questions regarding FITS, please contact Accounting Services at hscacegtuhac.edu. For training related questions about FITS, please contact Finance Systems Management at Ismgtuhac.edu.		

The "Status" tab automatically populates with all IPFTs for which you are the Originator or a TEAM App Financial Manager or Approver.

Users can search for a specific IPFT the following ways:

- By Chart: Use "E" for Health Sciences Center El Paso
- By Fund & Orgn: Search by either Fund or Orgn, or both
- By User: Returns results for all IPFTs the user is involved in
- By Date Range: Returns results by the date last modified
- By FiTS ID: Enter all or a portion of the ID

Users can search using multiple parameters from the list above. Depending on how many parameters are used, the search may have to be refined or expanded.



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After entering the desired search parameters, click the "**Search**" button to perform the search. If you would like to perform a different search, you can select the "**Clear Search**" button to clear the search fields.

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Depending on how many results are returned, you can move between the pages of results using the arrow buttons near the bottom of the page. You may select the number of rows displayed per page by using the radio buttons.

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In addition to IPFTs, FiTS is used for Cost Transfers (CT), Interdepartmental Billings (IV), and Revenue Journal Vouchers (RT). You can limit search results to only IPFTs (PT) by selecting the PT radio button.

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TTUHSC El Paso Finance Systems Management



The results will be sorted numerically by the FiTS ID. However, the results can be sorted by any of the columnar fields.

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The search results will also show the following columns:

- The Status of the IPFT
- The Originator of the IPFT
- The Date of the last modification to the IPFT
- The User who last modified the IPFT

The "**Status**" column of the search results will reflect the current stage in the FiTS process for a specific IPFT. These stages include:

- **Started**: IPFT has been started by the Originator, but not marked complete. If you are the Originator for an IPFT, you will have the option to click the "Edit" button to make changes, or the "**Delete**" button to delete the IPFT from FiTS.
- Completed: IPFT has been marked complete, but not submitted to Approvals. If you are an Originator for an IPFT, you will have the option to click the "Edit", "Delete", or "Approvals" buttons. Selecting the "Approvals" button will send the IPFT into the approval process.
- **Submitted**: IPFT has been submitted for approvals. If you are the Originator for the IPFT, you will be able to check the progress of the approvals. If you are a Fund Manager or Approver you will have the option to approve the IPFT after clicking the "Review" button.



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  - **Rejected**: IPET has been rejected in ETTS by a Fund Manager, Approver, or Accountant. If you are an Originator, you will have the option to "**Edit**" or "**Delete**" the IPFT.
  - **Errors**: IPFT has incurred an error while trying to post. Please contact Financial Systems Management at <u>FSMEIp@ttuhsc.edu</u> for assistance.

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The other 3 columns show the user who originated the IPFT, the date of the last modification of the IPFT, and the user who made the last modification.

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TTUHSC El Paso Finance Systems Management



# Searching the History Tab

The "**History**" tab can be used to search for any IPFT(s) that has been processed and posted.

To begin, click on the "History" tab from the home page of FiTS.

TEXAS TECH UNIVERSITY SYSTEM	TEST   VS.0114   Jillian Townsen	d   Texas Tech University   Sign Out
Welcome to FITS Create Cost Transfer Create IV Create Revenue JV Create IPPT Status History	Session inactive for 0 minutes Remaining time is 35 minutes	
Welcome to Fits         The Financial Transaction System (FitS) consists of 3 modules, which include:         • Cost Transfers Allows departments to move current fiscal year expenditures between * Ns Allows Service departments to bill expenditures to departmental FOA * Jvs Revenue Journal Vouchers • Allows departments to move current fiscal year revenue between departmental FOAPs (HSC)         • Allows departments to move current fiscal year revenue between departmental FOAPs (HSC)         • Allows departments to move current fiscal year revenue from clearing accounts to departmental FOAPs (TTU and TTUS)         Internal Purchase Funding Transfers (IPFTs) (HSC Only) Jvs		
Allows departments to transfer funds from one fund to another for professional services, continuing professional education, and other internal purchases of goods or services.     Contact Information:         TTU         For policy related questions regarding FiTS, please contact Financial Services and Tax at fugmuedu.         For training related questions about FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions regarding FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions regarding FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions regarding FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions regarding FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions about FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions regarding FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions about FiTS, please contact AFISM at alsm.2knowgmuedu.         For policy related questions about FiTS, please contact Finance Systems Management at tsmgtuhc.edu.         For training related questions about FiTS, please contact Finance Systems Management at tsmgtuhc.edu.		

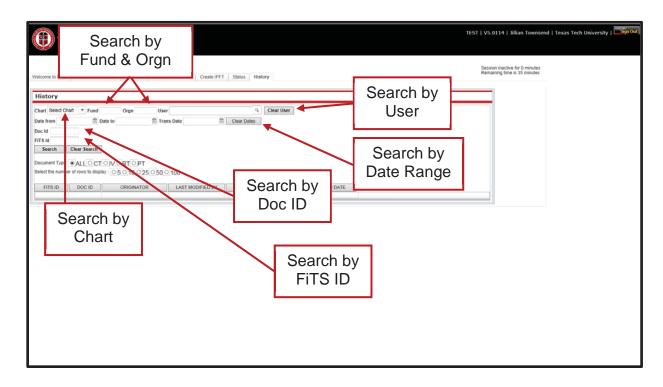
The "History" tab does not automatically populate with any IPFTs.

User can search for a specific IPFT the following ways:

- By Chart: Use "E" for Health Sciences Center El Paso
- By Fund & Orgn: Search by either Fund or Orgn, or both
- By User: Returns results for all IPFTs a user is involved in
- By Date Range: Returns results by date last modified
- By Transaction Date: Returns results for IPFTs posted by date entered
- By Doc ID: Enter all or a portion of the Banner Document ID that the IPFT was assigned when it was fully processed and posted
- By FiTS ID: Enter all or a portion of the ID

Users can search using multiple parameters from the list above. Depending on how many parameters are used, your search may have to be refined or expanded.





After entering in the desired search parameters, click the "**Search**" button to perform the search. To perform a different search, select the "**Clear Search**" button to clear the search fields.

TEXAS TECH UNIVERSITY SYSTEM		TEST   VS.0114   Jillian Townsend   Texas Tech University   🔤 mout
Welcome to FiTS Create Cost Transfer Create IV Create Revenue JV Create IPF	T Status History	Session inactive for 4 minutes Remaining time is 31 minutes
History Charl H • Fund Orgn User Dele from Date to Trans Date Fit's si Search Clear Search Doct M I I I I I I I I I I I I I I I I I I	Click "Clear Click "Clear Search" button	
Click " <b>Search</b> " button		



Depending on how many results are returned, you can move between the pages of results using the arrow buttons near the bottom of the page. You may select the number of rows displayed per page by using the radio buttons.

TE	XAS TECH	UNIVERSITY SYST	EM				TEST   VS.0114   Jillian Townsend   Texas Tech University   🛅
Velcome to FiTS	Create Cost	Transfer   Create IV   )	Create Revenue JV   Create	+ IPFT Status Histo	(y		Session inactive for 12 minutes Remaining time is 23 minutes
History							
Chart H Date from Doc Id FiTS Id	• Fund	and the second sec	User Trans Date	ও   শি Clear Dates	Clear User		
Search Document Type		TOIVORTOPT play: 05 • 18 025 0 ORIGINATOR	250 0 100	BY ] LAST MOD		Number of to Display	
CT000016	CA000001	ida Butier	Lisa Castilo	06/03/2013		View	
CT000017	CA000004	Vicki Clayton	Michael Burns	06/05/2013		View	
CT000019	CA000003	Vicki Clayton	Vicki Clayton	06/03/2013		View	
CT000025 CT000026	CA000012 CA00000	Andre Handler	-				
CT000026 CT000034	CA00000		Back & I	Forward	d Arrows	;	
CT000039	CA000009	Angela Salmon	Angela Salmon	06/10/2013		View	
CT000040	CA000006	Enn Woode	Lisa Castillo	06/10/2013		View	
CT000045	CA000010	Yuren Diaz	Yuren Diaz	06/11/2013		View	
CT000047	CA000008	Erin Woods	Enin Woods	06/11/2013		View	
1.11							1 - 10 / 4211

In addition to IPFTs, FiTS is used for Cost Transfers (CT), Interdepartmental Billings (IV), and Revenue Journal Vouchers (RT). You can limit search results to only IPFTs (PT) by selecting the PT radio button.

History								
Chart 📕	- Fund	Orgn Us	ser	۹ Ch	ear User			
Date from	Ē	Date to 📋 Tr	rans Date	Clear Dates				
loc id								
ITS Id Search	Clear Search	1				NI.		
						Narrow F	Results by	
		T ○ IV ○ RT ● PT play: ○ 5 ● 10 ○ 25 ○ 50	0 100				Type (PT)	
				1	and an and a state of the state	Document	Type (TT)	
FITS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED T	ME			
PT000004	CZ000028	Timira Woods San Roman	Rebecca Aguilar	01/27/2014	12/31/2013	View		
PT000008	CZ000019	Timira Woods San Roman	Rebecca Aguilar	01/23/2014	01/23/2014	View		
PT000013	CZ000007	Chance Riggins	Suzanne Dean	01/22/2014	01/22/2014	View		
PT000026	CZ000021	Michael Burns	Rebecca Aguilar	01/23/2014	01/23/2014	View		
PT000039	CZ000027	Rebecca Aguilar	Rebecca Aguilar	01/27/2014	12/31/2013	View		
PT000045	CZ000009	Michael Burns	Rebecca Aguilar	01/22/2014	01/22/2014	View		
	CZ000012	Suzanne Dean	Rebecca Aguilar	01/23/2014	01/23/2014	View		
PT000047				1.4.4.5.4.5.0.4.4.4.4.4.4.4.4.4.4.4.4.4.4	12/31/2013	View		
PT000047 PT000048	CZ000025	Suzanne Dean	Jillian Townsend	01/24/2014	1213112013	VIEW		
	CZ000025 CZ000014	Suzanne Dean Suzanne Dean	Jillian Townsend Rebecca Aguilar	01/24/2014 01/23/2014	01/23/2014	TRO		

TTUHSC El Paso Finance Systems Management

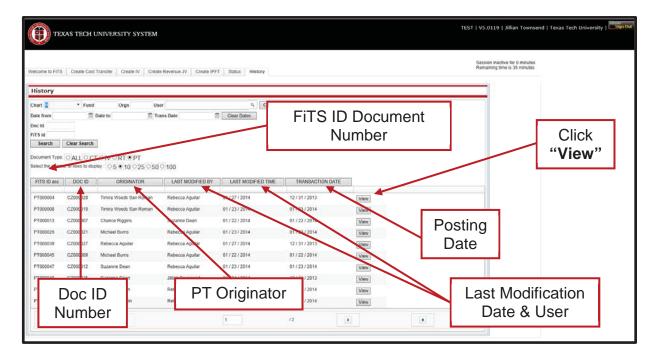


The results will be sorted numerically by the FiTS ID. However, the results can be sorted by any of the columnar fields.

The search results will also show the following columns:

- The Banner Document ID assigned when processed
- The Originator of the IPFT
- The User who last modified the IPFT
- The Date of the last modification to the IPFT
- The Date the IPFT was processed and posted

To view the detail of the processed IPFT, click the "View" button.



If you have a policy question regarding the IPFT process, please contact Accounting Services at <u>AccountingElp@ttuhsc.edu</u>.

If you have a training question about FiTS, please contact Finance Systems Management at <u>FSMEIp@ttuhsc.edu</u>.