



Financial Transaction System (FiTS) – Cost Transfers

The Cost Transfer module of the Financial Transaction System (FiTS) allows departments to move current fiscal year expenditures between departmental FOAPs (Fund-Organization-Account-Program), where the Fund, Organization, and Account fields are 6-digit codes and the Program field is a 2-digit code. FiTS cannot be used to move payroll related expenditures or encumbrances. When a current year payroll cost transfer becomes necessary, a Labor Redistribution must be submitted through the online Labor Redistribution system. Changes or additions for Purchase Orders (POs) should be submitted through the online PO/Encumbrance Change Request system. The transferring of prior fiscal year expenditures should be coordinated through Accounting Services.

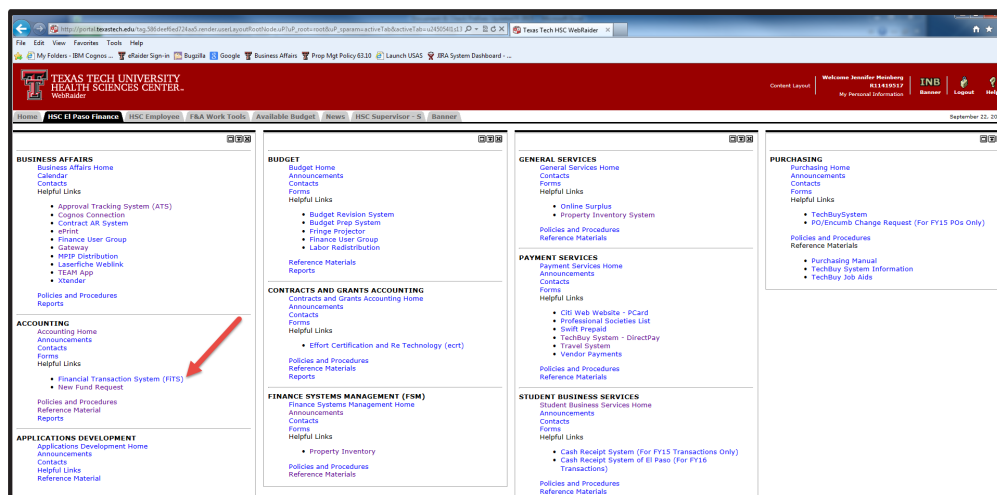
After review and approval, the system will post the Cost Transfer to Banner. Departmental approval, functional review and final approvals are managed through FiTS. Transaction tracking, archiving, and retrieving of information related to the Cost Transfer is managed within the system as well.

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

FiTS allows a departmental user to do the following:

- Start a Cost Transfer request
- Resume completion of a Cost Transfer request
- Submit a Cost Transfer request to approvals
- Approve, Reject, or Delete a Cost Transfer request
- Review the Status of a Cost Transfer request
- Review the History of a Cost Transfer request

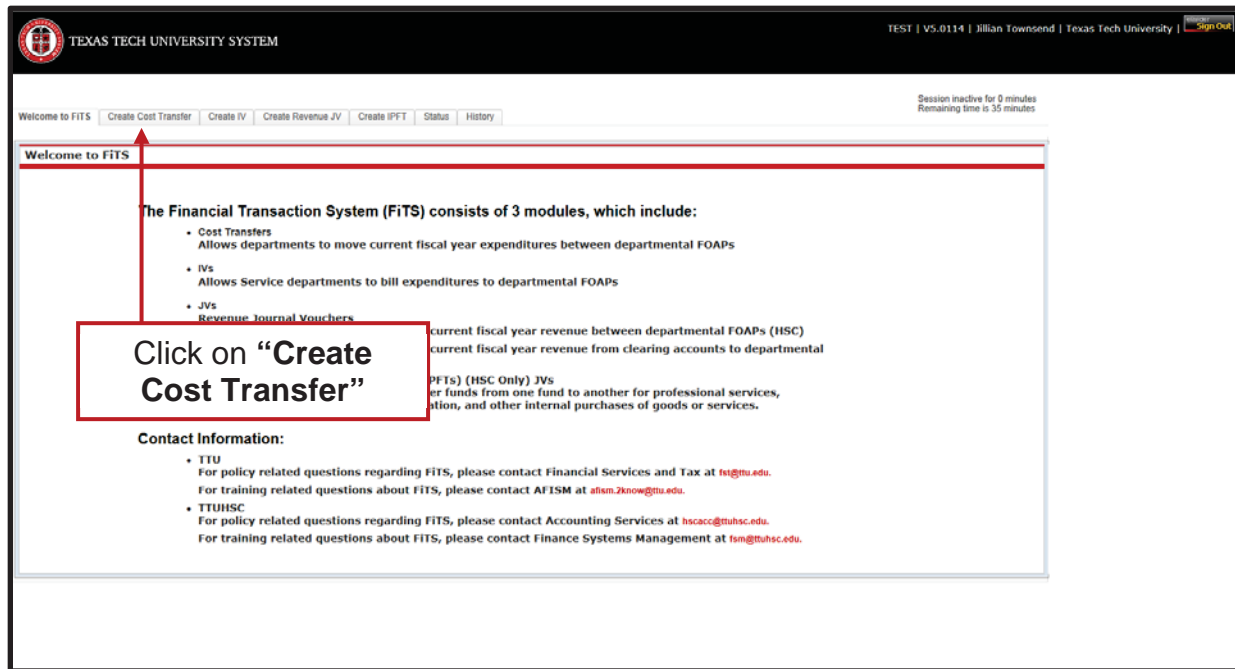
FiTS can be accessed from the WebRaider portal, [HSC El Paso Finance](#) tab, under Accounting.



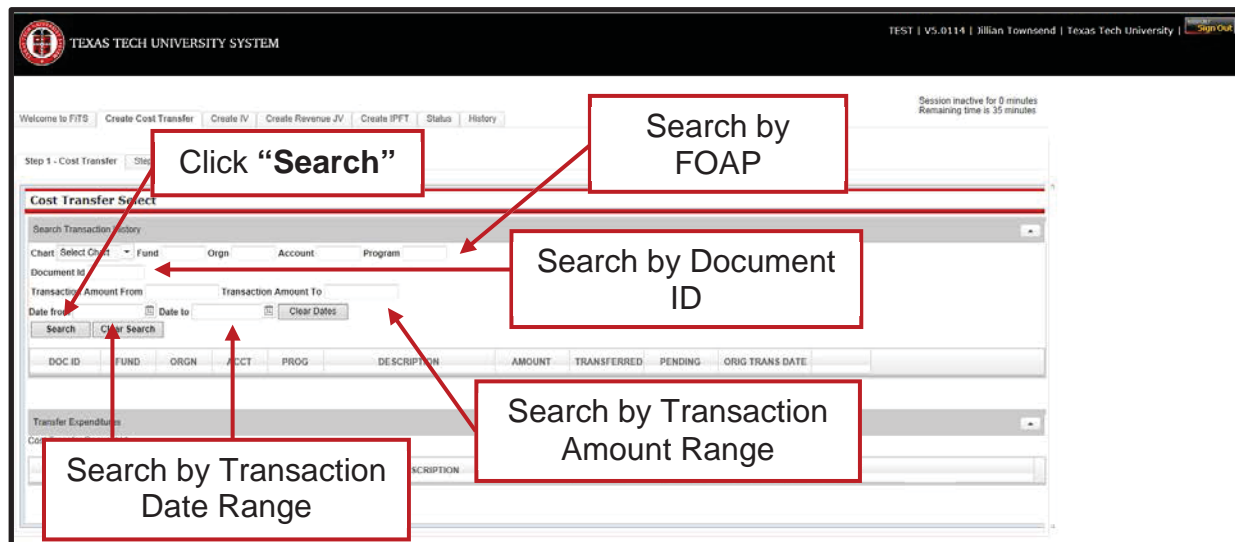


Creating a Cost Transfer

To begin a Cost Transfer, click on the “**Create Cost Transfer**” tab at the top of the webpage.



Begin each search by selecting “E” from the “Chart” drop down box. After entering the desired search parameters, click on the “**Search**” button. When the system has finished searching, any expense transactions that match the search criteria will populate in the section directly below the search function.





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**If your screen shows the search parameters differently than above and you are using Internet Explorer 11, switch to Compatibility View. For instructions on how to switch to Compatibility View, contact the IT Help Desk for your campus.*

Expenses can be searched for in the following ways:

- By FOAP
 - o Search by Fund and/or Orgn, or by the entire FOAP
- By Document ID
 - o Search by a complete Document ID or a portion of a Document ID
- By Transaction Amount Range
 - o Search by an amount or a range of amounts using the “Transaction Amount From” and/or the “Transaction Amount To” fields
- By Transaction Date Range
 - o Search by a date or a range of dates using the “Date from” and/or the “Date to” fields

The search may return multiple pages of results. If you do not see the specific expense you are looking for, the arrows at the bottom of the “Search Transaction History” section will allow you to move to the next page(s).

TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0114 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FITS | Create Cost Transfer | Create JV | Create Revenue JV | Create IPFT | Status | History

Session inactive for 2 minutes
Remaining time is 33 minutes

Step 1 - Cost Transfer | Step 2 - Questions Attachments Comments | Step 3 - Finish

Cost Transfer Select

Search Transaction History

Chart: H Fund: 181388 Orgn: Account: Program:

Document ID:

Transaction Amount From: Transaction Amount To:

Date from: Date to: Clear Dates

Search Clear Search

DOC ID	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	TRANSFERRED	PENDING	ORIG TRANS DATE
CA000362	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2013/1/22
10136333	181388	201193	730000	60	COMPLETE REPROGRAPHICS INC	1.00	0.00	0.00	2014/01/06
10136348	181388	201193	730000	60	COMPLETE AUTO REPAIR	1.00	0.00	0.00	2014/01/06
10136398	181388	201193	730000	60	AFFORDABLE TENT RENTALS INC	1.50	0.00	0.00	2014/5/21
JA007796	181388								9/09/12
JA007796	181388								9/09/12
JA007796	181388								9/09/12
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	57.00	1.00	3.01	2013/10/16
JV122455	181388	201193	711200	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	19.08	0.00	0.00	2013/10/16
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	156.18	0.00	0.00	2013/10/16

Back & Forward Arrows

1 2 [1 - 107/15]



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The search screen will reflect the amount of the expense that has already been transferred and/or has pending transfer requests waiting for approvals. The **“Select”** button will be unavailable if the expense has been fully transferred to another FOP.

DOC ID	FUND	ORGN	ACCT	PRDG	DESCRIPTION	AMOUNT	TRANSFERRED	PENDING	ORIG TRANS DATE	
CA000362	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2013/11/22	Select
I0136333	181388	201193	730000	60	COMPLETE REPROGRAPHICS INC	1.00	0.00	0.00	2014/01/06	Select
I0136348	181388	201193	730000	60	COMPLETE AUTO REPAIR	1.00	0.00	0.00	2014/01/06	Select
I0136386	181388	201193	730000	60	AFFORDABLE TENT RENTALS INC	1.50	0.00	0.00	2014/01/21	Select
JA007796	181388	201193	711103	60	EXPENSE IE133819 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12	Select
JA007796	181388	201193	711103	60	EXPENSE IE133820 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12	Select
JA007796	181388	201193	711103	60	EXPENSE IE133821 FY13 ACCRUAL	379.30	0.00	0.00	2013/09/12	Select
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	57.00	1.00	3.01	2013/10/16	Select
JV122455	181388	201193	711200	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	18.08	0.00	0.00	2013/10/16	Select
JV122455	181388	201193	711101	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	156.18	0.00	0.00	2013/10/16	Select

When you locate the specific expense to be transferred, click the **“Select”** button to the right of the expense. Clicking the **“Select”** button will populate the bottom section (Transfer Expenditures) of the screen.

DOC ID	FUND	ORGN	ACCT	PRDG	DESCRIPTION	AMOUNT	TRANSFERRED	PENDING	ORIG TRANS DATE	
CA000362	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2013/11/22	Select
I0136333	181388	201193	730000	60	COMPLETE REPROGRAPHICS INC	1.00	0.00	0.00	2014/01/06	Select
I0136348	181388	201193	730000	60	COMPLETE AUTO REPAIR	1.00	0.00	0.00	2014/01/06	Select
I0136386	181388	201193	730000	60	AFFORDABLE TENT RENTALS INC	1.50	0.00	0.00	2014/01/21	Select
JA007796	181388	201193	711103	60	EXPENSE IE133819 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12	Select
JA007796	181388	201193	711103	60	EXPENSE IE133820 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12	Select
JA007796	181388	201193	711103	60	EXPENSE IE133821 FY13 ACCRUAL	379.30	0.00	0.00	2013/09/12	Select
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	57.00	1.00	3.01	2013/10/16	Select
JV122455	181388	201193	711200	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	18.08	0.00	0.00	2013/10/16	Select
JV122455	181388	201193	711101	60	H1004_SALT LAKE CITY_CAROLE KAYE WA	156.18	0.00	0.00	2013/10/16	Select



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Once an expense has been selected, a Cost Transfer Request ID (FiTS ID) is assigned. The FiTS ID can be used to track your Cost Transfer throughout the approval process. After the expense has populated in the “Transfer Expenditures” section, click the “**Edit**” button in order to enter the FOP you would like the expense transferred to.

DOC ID	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	TRANSFERRED	PENDING	ORIG TRANS DATE
CA000362	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2013/11/22
CA000363	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2014/02/11
I0136333	181388	201193	730000	60	COMPLETE REPROGRAPHICS INC	1.00	0.00	0.00	2014/01/06
I0136348	181388	201193	730000	60	COMPLETE AUTO REPAIR	1.00	0.00	0.00	2014/01/06
I0136386	181388	201193	730000	60	AFFORDABLE TENT RENTALS INC	1.50	0.00	0.00	2014/01/21
JA007796	181388	201193	711103	60	EXPENSE IE133819 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
JA007796	181388	201193	711103	60	EXPENSE IE133820 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
JA007796	181388	201193	711103	60	EXPENSE IE133821 FY13 ACCRUAL	379.30	0.00	0.00	2013/09/12
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE	57.00	2.00	3.00	2013/10/16
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE	18.08	0.00	0.00	2013/10/16

Transfer Expenditures
Cost Transfer Request ID: **CT001387**

DOC ID	CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	ORIG TRANS DATE	POSTING DATE
JA007796	H	181388	201193	711103	60	JA007796 T xxxxxx NO VENDOR	0.00	C	09/12/2013	02/18/2014
JA007796	H			711103		JA007796 F 181388 NO VENDOR	0.00	D		02/18/2014

When the Transfer To FOP has been entered, enter the amount to be transferred. The entire amount or a partial amount of the original expense can be transferred. After filling in the amount to be transferred, click the “**Save**” button to save your progress.

Cost Transfer Select

Search Transaction History

Chart: H Fund: 181388 Orgn: Account: Program:

Document ID: []

Transaction Amount From: [] Transaction Amount To: []

Date from: [] Date to: [] Clear Dates

Search Clear Search

DOC ID	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	TRANSFERRED	PENDING	ORIG TRANS DATE
CA000362	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2013/11/22
CA000363	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2014/02/11
I0136333	181388	201193	730000	60	COMPLETE REPROGRAPHICS INC	1.00	0.00	0.00	2014/01/06
I0136348	181388	201193	730000	60	COMPLETE AUTO REPAIR	1.00	0.00	0.00	2014/01/06
I0136386	181388	201193	730000	60	AFFORDABLE TENT RENTALS INC	1.50	0.00	0.00	2014/01/21
JA007796	181388	201193	711103	60	EXPENSE IE133819 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
JA007796	181388	201193	711103	60	EXPENSE IE133820 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
JA007796	181388	201193	711103	60	EXPENSE IE133821 FY13 ACCRUAL	379.30	0.00	0.00	2013/09/12
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE	57.00	2.00	3.00	2013/10/16
JV122455	181388	201193	711501	60	H1004_SALT LAKE CITY_CAROLE	18.08	0.00	0.00	2013/10/16

Transfer Expenditures
Cost Transfer Request ID: **CT001387**

DOC ID	CHART	FUND	ORGN	ACCT	PROG	DESCRIPTION	AMOUNT	D / C	ORIG TRANS DATE	POSTING DATE
JA007796	H	181388	201193	711103	60	JA007796 T xxxxxx NO VENDOR	0.00	C	09/12/2013	02/18/2014
JA007796	H			711103		JA007796 F 181388 NO VENDOR	0.00	D		02/18/2014



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Cost Transfer Select

Search Transaction History

Chart: H Fund: 181388 Orgn: Account: Program:

Document Id:

Transaction Amount From: Transaction Amount To:

Date from: Date to: Clear Dates

Search Clear Search

DOC ID	FUND	ORGN	ACCT	PRG	DESCRIPTION	AMOUNT	TRANSFERRED	PENDING	ORIG TRANS DATE
CA000362	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2013/11/22
CA000363	181388	201193	711501	60	JV122455 T 181034 NO VENDOR	(1.00)	0.00	0.00	2014/02/11
I0136333	181388	201193	730000	60	COMPLETE REPROGRAPHICS INC	1.00	0.00	0.00	2014/01/06
I0136348	181388	201193	730000	60	COMPLETE AUTO REPAIR	1.00	0.00	0.00	2014/01/06
I0136386	181388	201193	730000	60	AFFORDABLE TENT RENTALS INC	1.50	0.00	0.00	2014/01/21
JA007796	181388	201193	711103	60	EXPENSE IE133819 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
JA007796	181388	201193	711103	60	EXPENSE IE133820 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
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JV122455	181388	201193	711501	60	H1004 SALT LAKE CITY_CAROLE KAYE WA	57.00	2.00	3.00	2013/10/16
JV122455	181388	201193	711200	60	H1004 SALT LAKE CITY_CAROLE KAYE WA	18.08	0.00	0.00	2013/10/16

Transfer Expenditures

Cost Transfer Request id: CT001387

DOC ID	CHART	FUND	ORGN	ACCT	PRG	DESCRIPTION	AMOUNT	D / C	ORIG TRANS DATE	POSTING DATE
JA007796	H	181388	201193	711103	60	JA007796 T xxxxxx NO VENDOR	0.00	C	09/12/2013	02/18/2014
JA007796	H	181034	201131	711103	60	JA007796 F 181388 NO VENDOR	2.00	D		02/18/2014

Enter the Amount to be Transferred

Click "Save" to save progress

You can select additional expenses from the original search, or begin a new search by clicking the "Clear Search" button.

Cost Transfer Select

Search Transaction History

Chart: H Fund: 181388 Orgn: Account: Program:

Document Id:

Transaction Amount From: Transaction Amount To:

Date from: Date to: Clear Dates

Search Clear Search

DOC ID	FUND	ORGN	ACCT	PRG	DESCRIPTION	AMOUNT	TRANSFERRED	PENDING	ORIG TRANS DATE
CA000362	181388	201193	711501					0.00	2013/11/22
CA000363	181388	201193	711501					0.00	2014/02/11
I0136333	181388	201193	730000					0.00	2014/01/06
I0136348	181388	201193	730000					0.00	2014/01/06
I0136386	181388	201193	730000	60	AFFORDABLE TENT RENTALS INC	1.50	0.00	0.00	2014/01/21
JA007796	181388	201193	711103	60	EXPENSE IE133819 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
JA007796	181388	201193	711103	60	EXPENSE IE133820 FY13 ACCRUAL	333.00	0.00	0.00	2013/09/12
JA007796	181388	201193	711103	60	EXPENSE IE133821 FY13 ACCRUAL	379.30	0.00	0.00	2013/09/12
JV122455	181388	201193	711501	60	H1004 SALT LAKE CITY_CAROLE KAYE WA	57.00	2.00	3.00	2013/10/16
JV122455	181388	201193	711200	60	H1004 SALT LAKE CITY_CAROLE KAYE WA	18.08	0.00	0.00	2013/10/16

Transfer Expenditures

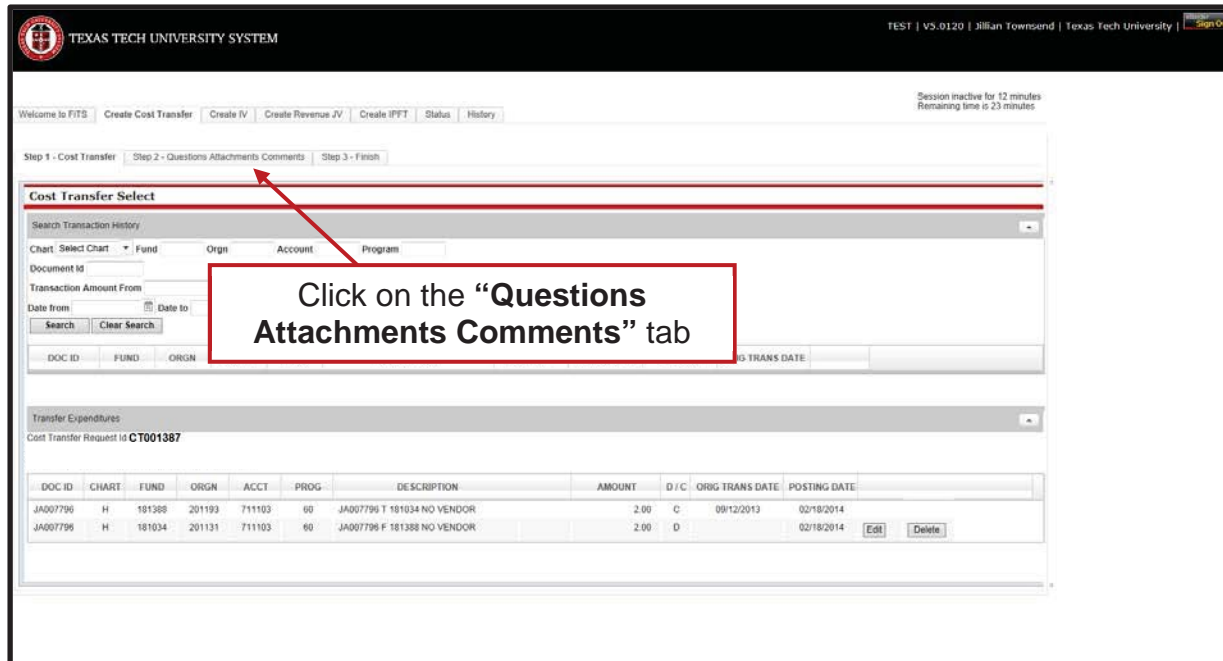
Cost Transfer Request id: CT001387

DOC ID	CHART	FUND	ORGN	ACCT	PRG	DESCRIPTION	AMOUNT	D / C	ORIG TRANS DATE	POSTING DATE
JA007796	H	181388	201193	711103	60	JA007796 T 181034 NO VENDOR	2.00	C	09/12/2013	02/18/2014
JA007796	H	181034	201131	711103	60	JA007796 F 181388 NO VENDOR	2.00	D		02/18/2014

Click "Clear Search" to begin new search



After all required fields have been completed on the “**Step 1 - Cost Transfer**” tab, select the “**Step 2 - Questions Attachments Comments**” tab.



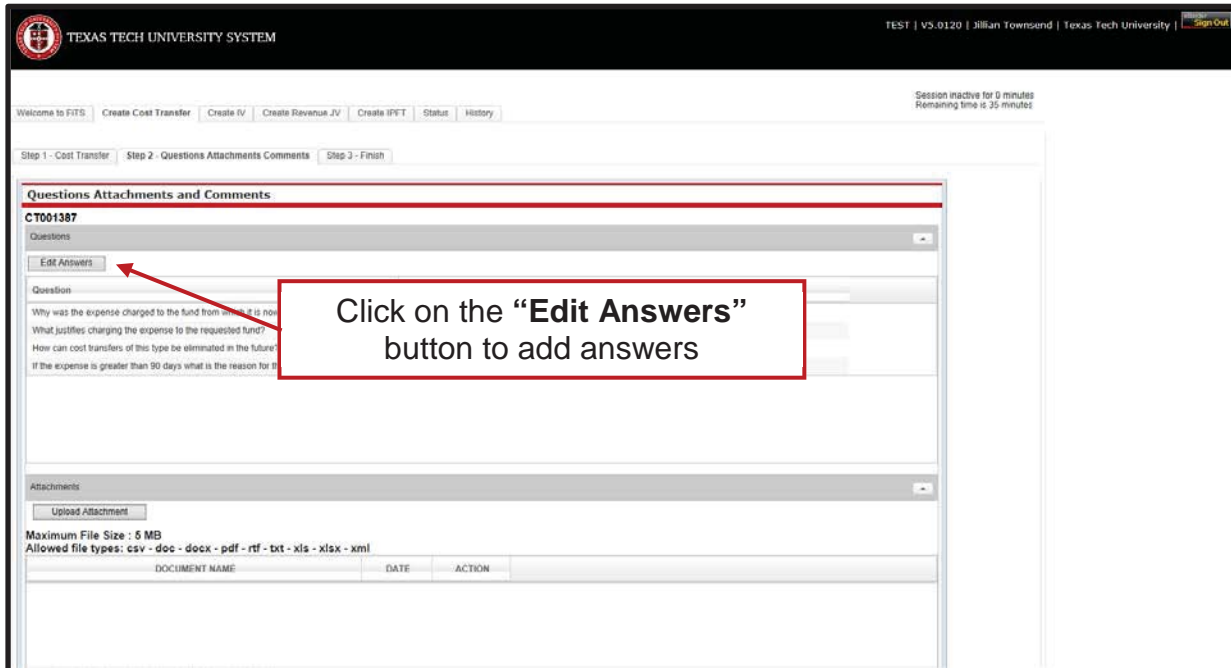
On the “**Step 2 - Questions Attachments Comments**” tab, you must answer all questions with clear and adequate information. There are three standard questions:

- Why was the expense charged to the fund from which it is now being transferred?
- What justifies charging the expense to the requested fund?
- How can cost transfers of this type be eliminated in the future?

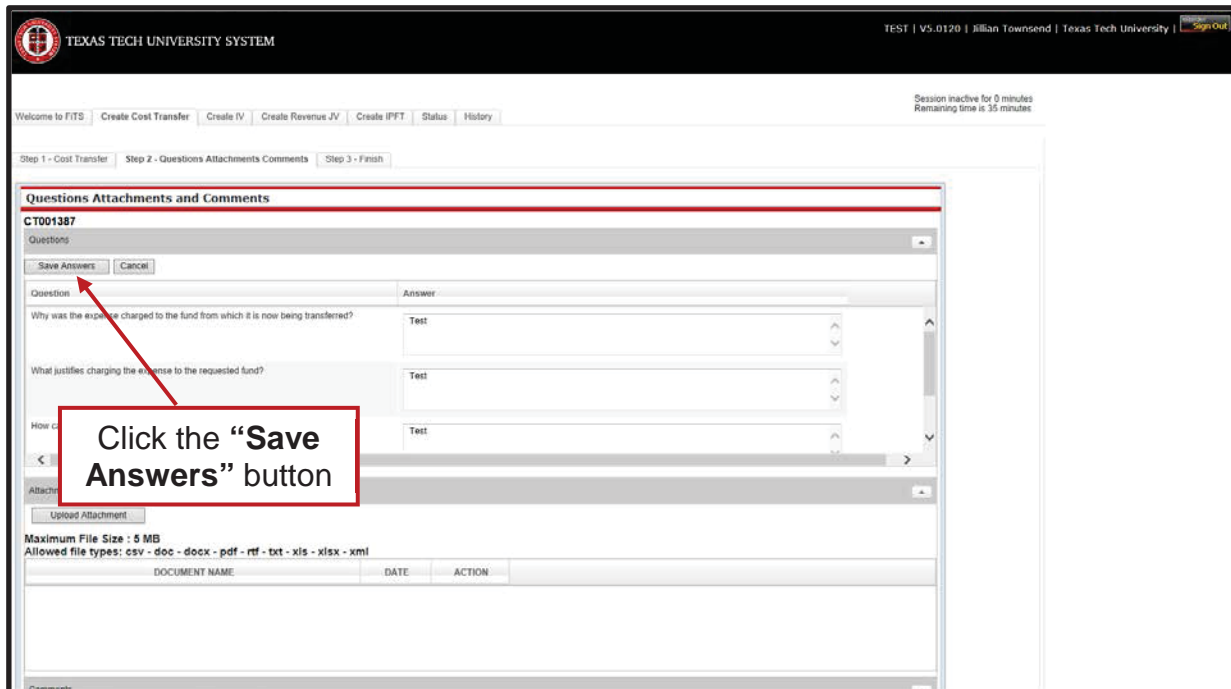
A fourth question will appear if the expenditure to be transferred is over 90 days old:

- If the expense is greater than 90 days what is the reason for the delay in processing?

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



After completing all of the required questions, click the **“Save Answers”** button.

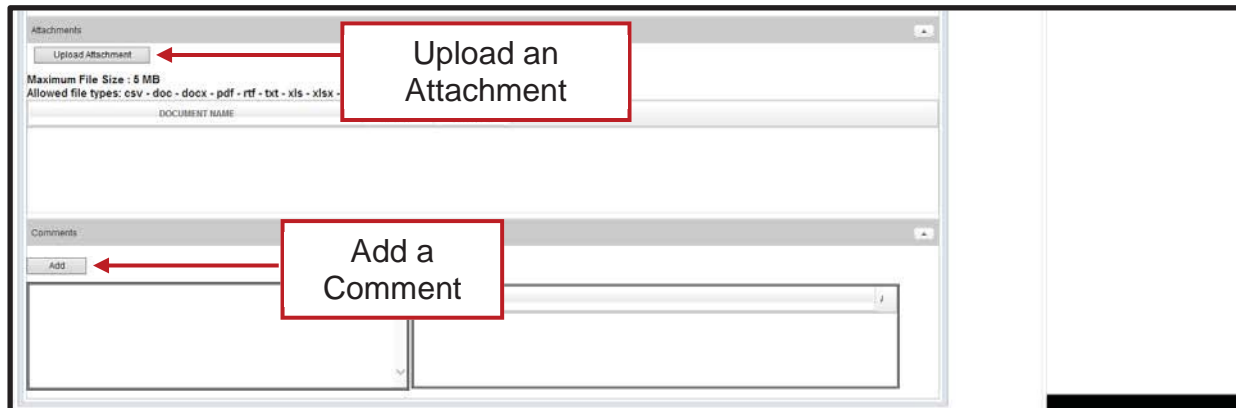




If you do not click the “**Save Answers**” button before navigation to another tab, or page, the system will not save your answers and you will lose all the information you entered.

Below the “Questions” section are the “Attachments” and “Comments” sections. In the “Attachments” section, you can upload attachment(s) (in one of the allowed file types) to provide additional information regarding the Cost Transfer.

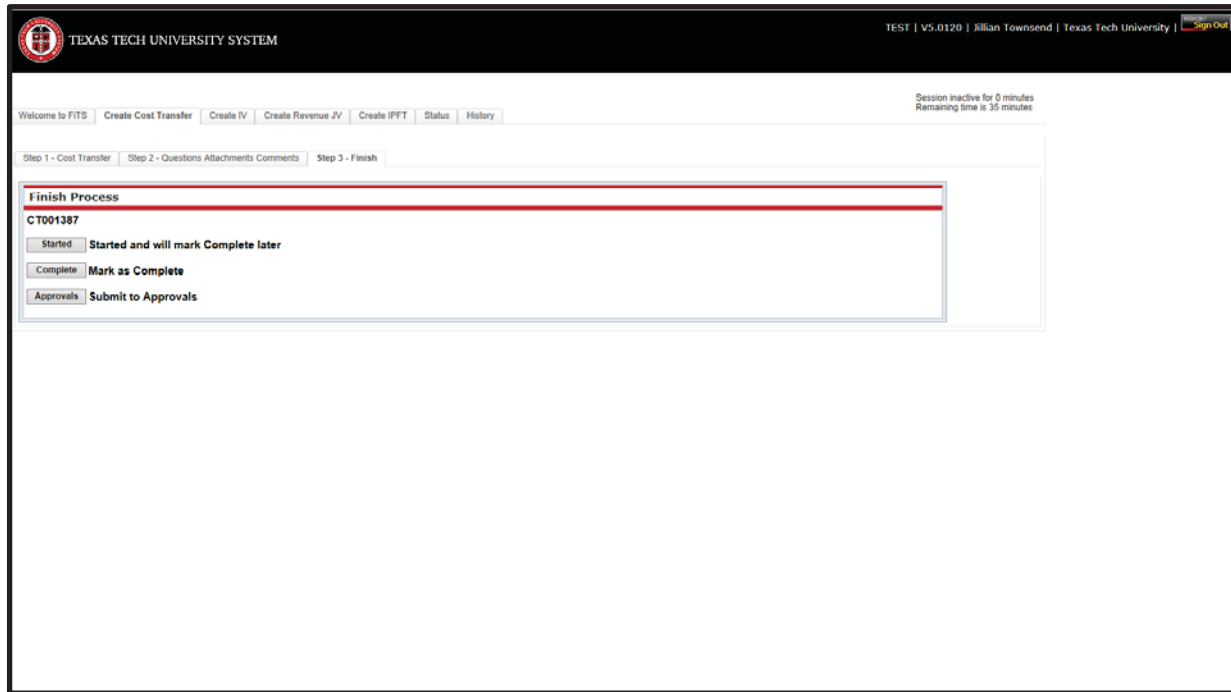
To add a comment, type the text into the box, then click the “**Add**” button to save the comment.



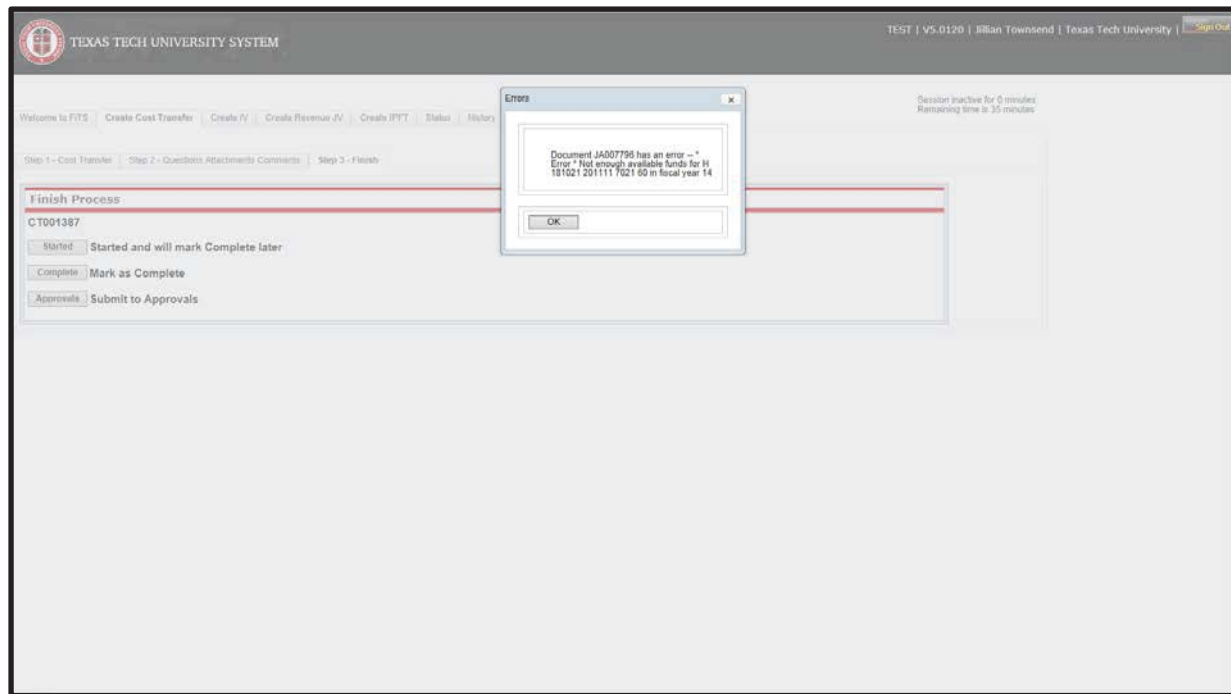
Attachments can be deleted after they have been added. Comments cannot be deleted after they have been added.

Once you have answered all of the required questions and added any additional attachments or 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
 - o Clicking this button saves your progress but will not mark the Cost Transfer as complete.
 - o Once clicked, it will take you back to a blank “**Step 1 - Cost Transfer**” tab to begin a new Cost Transfer if desired.
 - o To mark the Cost Transfer as Complete after clicking this option, search for the Cost Transfer in the “**Status**” tab (instructions located below).
- Mark as Complete
 - o Clicking this button marks the Cost Transfer as complete in the system, but will not route through approvals.
 - o To send the Cost Transfer to approvals after clicking this option, search for the Cost Transfer in the “**Status**” tab (instructions located below).
- Submit to Approvals
 - o Clicking this button will send the Cost Transfer to the Approval queues for each fund’s TEAM App Financial Manager and Approver(s) and Accounting Services for review, approval, or rejection.



Selecting **“Mark as Complete”** or **“Submit to Approvals”**, will notify you of any budgetary errors that may exist in the form of a pop up message.





If you receive a budget error, the pop up message will indicate the FOP with the error. At this time the Transfer To FOP may be edited or the Cost Transfer 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 proper Budget Account Code (BAC) in order for the Cost Transfer to be submitted. Once the budget error is corrected the Cost Transfer can be set to “Mark as Complete” or “Submit to Approvals”. This error may also occur if there is a previous transaction pending a BR; any subsequent Cost Transfers will also receive this error. A BR needs to be submitted with enough funds to accommodate all transactions.

If you select “**Mark as Complete**”, this does not send the Cost Transfer to approvals. In order to send the Cost Transfer to approvals, navigate to the “**Status**” tab and locate your Cost Transfer by the FiTS ID. Once located, select the “**Approvals**” button.

The screenshot shows the 'Status' tab in the Texas Tech University System. It features a search bar for FITS ID, filters for Fund, Orgn, and User, and a table of FITS Documents. The table has columns for FITS ID, asc, STATUS, ORIGINATOR, LAST MOD DATE, and LAST MODIFIED BY. A red box highlights the 'Approvals' button next to the document with FITS ID RT000125.

FITS ID	asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY	Actions
CT001374		Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Review
CT001376		Submitted	Jillian Townsend	01 / 30 / 2014	Jillian Townsend	Review
CT001387		Completed	Jillian Townsend	02 / 20 / 2014	Jillian Townsend	Edit, Delete, Approvals
PT000096		Submitted	Michael Crowder	02 / 18 / 2014	Michael Crowder	Review
RT000124		Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	Edit, Delete
RT000125		Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	Edit, Delete, Approvals

After the Cost Transfer 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 Cost Transfer. If errors or lack of justification are found, the Cost Transfer can be rejected.

In the case of rejection, the Cost Transfer 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 Cost Transfer. 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.



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Questions Attachments and Comments

CT001387

Questions

Edit Answers

Question	Answer
Why was the expense charged to the fund from which it is now being transferred?	Test
What justifies charging the expense to the requested fund?	Test
How can cost transfers of this type be eliminated in the future?	Test
If the expense is greater than 90 days what is the reason for the delay in processing?	Test

Attachments

Upload Attachment

Maximum File Size : 5 MB
Allowed file types: csv - doc - docx - pdf - rtf - txt - xls - xlsx - xml

DOCUMENT NAME	DATE	ACTION
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Comments

Add

COMMENT
Jillian Townsend 2/20/14 10:05:23 AM RS-INSUFFICIENT JUSTIFICATION FOR ALL QUESTIONS TEST Rejection Optional Text

Click on the Comment

The rejection reason and any comments pertaining to the rejection will be shown in the form of a popup message.

Questions Attachments and Comments

CT001387

Questions

Edit Answers

Question	Answer
Why was the expense charged to the fund from which it is now being transferred?	Test
What justifies charging the expense to the requested fund?	Test
How can cost transfers of this type be eliminated in the future?	Test
If the expense is greater than 90 days what is the reason for the delay in processing?	Test

Attachments

Upload Attachment

Maximum File Size : 5 MB
Allowed file types: csv - doc - docx - pdf - rtf - txt - xls - xlsx - xml

DOCUMENT NAME	DATE	ACTION
---------------	------	--------

Comments

Add

COMMENT
Jillian Townsend 2/20/14 10:05:23 AM RS-INSUFFICIENT JUSTIFICATION FOR ALL QUESTIONS TEST Rejection Optional Text

Comment by -
Jillian Townsend 2/20/14 10:05:23
AM RS-INSUFFICIENT
JUSTIFICATION FOR ALL QUESTIONS
TEST Rejection Optional Text

Click OK to close message

OK

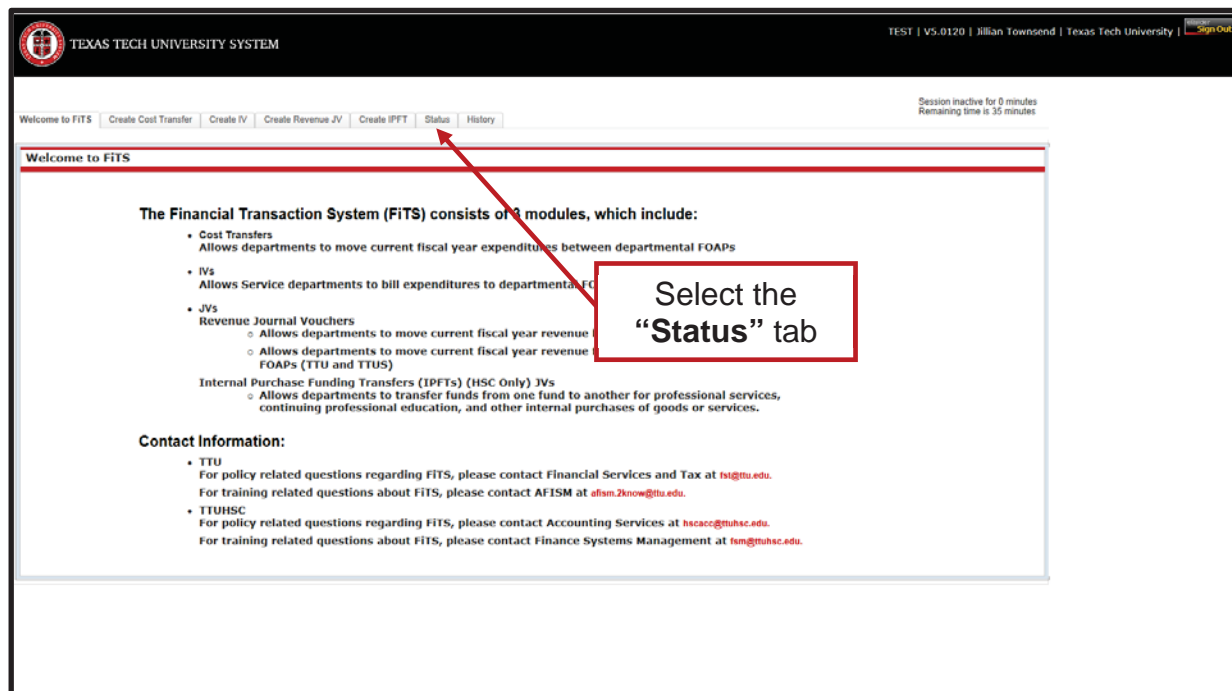


After reviewing the rejection reason and/or comments, modify the Cost Transfer accordingly. After providing the requested information or making the requested changes, click on the “**Step 3 – Finish**” tab and select the “**Approvals**” button to send the rejected Cost Transfer through the approval process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

Deleting a Cost Transfer

Only the Originator of a Cost Transfer has the ability to delete a Cost Transfer from FiTS.

In order to delete a Cost Transfer, access FiTS and select the “**Status**” tab.



After selecting the “**Status**” tab, the screen will populate with all of the Cost Transfers 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 Cost Transfer(s) you wish to delete by Fund, Orgn, a date range that the Cost Transfer 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 20 of this training document.



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Once the Cost Transfer to be deleted is located, click on the **“Delete”** button to the right of the Cost Transfer.

TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | 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

Status

Chart: Select Chart | Fund: | Origin: | User: | [Clear User](#)

Date from: | Date to: | [Clear Dates](#)

FITS ID: | [Search](#) | [Clear Search](#)

Select a Document Type: ALL | CT | IV | RT | OPT

Select the number of rows to display: 5 | 10 | 25 | 50 | 100

Your FITS Documents

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Review	
CT001376	Submitted	Jillian Townsend	01 / 30 / 2014	Jillian Townsend	Review	
CT001387	Rejected	Jillian Townsend	02 / 20 / 2014	Jillian Townsend	Edit	Delete
PT000096	Submitted	Michael Crowder	02 / 18 / 2014	Michael Crowder	Review	
RT000124	Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	Edit	Delete
RT000125	Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	Edit	Delete

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 Cost Transfer. If you are sure of your selection, click **“OK”**. If not, click **“Cancel”**.

TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0120 | 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

Status

Chart: Select Chart | Fund: | Origin: | User: | [Clear User](#)

Date from: | Date to: | [Clear Dates](#)

FITS ID: | [Search](#) | [Clear Search](#)

Select a Document Type: ALL | CT | IV | RT | OPT

Select the number of rows to display: 5 | 10 | 25 | 50 | 100

Your FITS Documents

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Review	
CT001376	Submitted	Jillian Townsend	01 / 30 / 2014	Jillian Townsend	Review	
CT001387	Rejected	Jillian Townsend	02 / 20 / 2014	Jillian Townsend	Edit	Delete
PT000096	Submitted	Michael Crowder	02 / 18 / 2014	Michael Crowder	Review	
RT000124	Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	Edit	Delete
RT000125	Started	Jillian Townsend	02 / 07 / 2014	Jillian Townsend	Edit	Delete

Delete

You selected to delete the document CT001387.
Are you sure?

[OK](#) | [Cancel](#)



If the Cost Transfer you have searched for does not have the “**Delete**” button populated to the right, the Cost Transfer does not have the option to be deleted.

If the Cost Transfer 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 Cost Transfer to be deleted. This list will indicate who has the option of rejecting the Cost Transfer.

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 - Cost Transfer | Step 2 - Questions Attachments Comments | Approvals

Approvals

CT001387

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	A Laree Bomar Carole Kaye Wardroup Jillian R. Townsend	Approved	Jillian Townsend	02/20/2014
TO Financial Manager	TEAM Fund Group	Celeste E. Kulinski			
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			

Search: Add Approver

There will be an option to delete the Cost Transfer after it has been rejected. You will need to search within the “**Status**” tab for the FITS ID to be deleted.

CTs 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 CT will be deleted the following Monday. To prevent the CT from being deleted, the Originator will need to make the necessary corrections before the following Monday.



Approving a Cost Transfer

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

From the “Approvals” tab, the TEAM App Financial Manager or Approver can select the **“Step 1 - Cost Transfer”** tab to review the Cost Transfer details or the **“Step 2 - Questions Attachments Comments”** tab to review the responses to the questions provided by the Originator, as well as any added attachments or comments.

TEXAS TECH UNIVERSITY SYSTEM

FEET | V5.0120 | Jillian Townsend | Texas Tech University | Sign Out

Welcome to FiTS: Create Cost Transfer Create JV Create Revenue JV Create PFT Status History

Session inactive for 2 minutes
Remaining time is 33 minutes

Step 1 - Cost Transfer Step 2 - Questions Attachments Comments Approvals

Approvals

CT001327

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	Ashlee Bonar Caleb Noye Wardrop Jillian R. Townsend	Select		
TO Financial Manager	TEAM Fund Group	Celeste Kulroski			
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilar Angela Marie Taylor			

Click to Review Cost Transfer

Click to Review Justification

TEAM App Financial Managers and Approvers have the option to edit the answers provided to the questions by the Originator by selecting the “Edit Answers” button, then the “Save Answers” after making edits. TEAM App Financial Managers and Approvers can also add additional information in the form of an attachment or comment before approving or rejecting the Cost Transfer.

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



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WELCOME TO FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History | Session inactive for 4 minutes | Remaining time is 31 minutes

Step 1 - Cost Transfer | Step 2 - Questions Attachments Comments | Approvals

Approvals

CT001387

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	A Laree Bomar Carole Kaye Wardroup Jillian K Townsend	Select		Save
TO Financial Manager	TEAM Fund Group	Celeste E Kulinski	Approve Reject		
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilera Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilera Angela Marie Taylor			

Add Approver

Select to Approve or Reject Cost Transfer

TEAM App Financial Managers and Approvers choosing to approve a Cost Transfer will need to select “Approve” from the drop down box on the “Approvals” tab and then select the “Save” button.

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 - Cost Transfer | Step 2 - Questions Attachments Comments | Approvals

Approvals

CT001387

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	A Laree Bomar Carole Kaye Wardroup Jillian K Townsend	Approve		Save
TO Financial Manager	TEAM Fund Group	Celeste E Kulinski			
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilera Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilera Angela Marie Taylor			

Add Approver

Select “Save”



TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER™ EL PASO

After selecting **“Save”**, a notification will appear asking the TEAM App Financial Manager or Approver if they are sure they wish to approve the document on all approval levels that are available for their approval.

If a TEAM App Financial Manager or Approver has more than one fund on a Cost Transfer, 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 Cost Transfer onto Accounting Services for approval and processing.

Are you sure you wish to approve this document?

By clicking YES at this approval level than all other approval levels that you have available to APPROVE will be marked as APPROVED.

If you need to REJECT at another approval level then do so by selecting REJECT on the approval level you want to reject it.

Yes No

Click **“Yes”** If Approving for All Responsible Funds

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.

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY
FROM Financial Manager	TEAM Fund Group	A Larre Bomar Carole Kaye Wardrop Jillian R Townsend	Reject	
TO Financial Manager	TEAM Fund Group	Celeste E Kulinski		
FROM Accountant	Fund Class Group - H 18	Michael Diane Burns Shannon Leigh Martin		
TO Accountant	Fund Class Group - H 18	Michael Diane Burns Shannon Leigh Martin		
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Agular Angela Marie Taylor		
TO Accountant Manager	Fund Class Group - H 18	Rebecca Agular Angela Marie Taylor		

REJECTION REASON: Select One

Select

- R1-INSUFFICIENT JUSTIFICATION FOR QUESTION 1
- R2-INSUFFICIENT JUSTIFICATION FOR QUESTION 2
- R3-INSUFFICIENT JUSTIFICATION FOR QUESTION 3
- R4-INSUFFICIENT JUSTIFICATION FOR QUESTION 4
- R5-INSUFFICIENT JUSTIFICATION FOR ALL QUESTIONS
- R6-EXPENSE NOT ALLOWED ON TRANSFER TO FUND
- R7-SEE COMMENTS

Select **“Reject”**

Select Rejection Reason



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

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

The screenshot shows the 'Approvals' section for Cost Transfer CT001387. The table below lists the approvers and their roles:

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group	A Laros Bonar Carole Kaye Wardrop Jillian R Townsend	Reject		
TO Financial Manager	TEAM Fund Group	Celeste E Kulinski			
FROM Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
TO Accountant	Fund Class Group - H 18	Michael Dane Burns Shannon Leigh Martin			
FROM Accountant Manager	Fund Class Group - H 18	Rebecca Aguilur Angela Marie Taylor			
TO Accountant Manager	Fund Class Group - H 18	Rebecca Aguilur Angela Marie Taylor			

Below the table, there is a 'REJECTION REASON: Select One' dropdown menu with 'R1-INSUFFICIENT JUSTIFICATION FOR I' selected. An 'Optional Text:' field is present with the text 'Please provide additional information for Question 1.' A 'Save' button is located to the right of the table. Red callout boxes highlight the 'Save' button and the 'Optional Text' field.

After clicking the **“Save”** button, the system will ask if you are sure you wish to reject the Cost Transfer. If you are, select **“Yes”**. If not, select **“No”**.

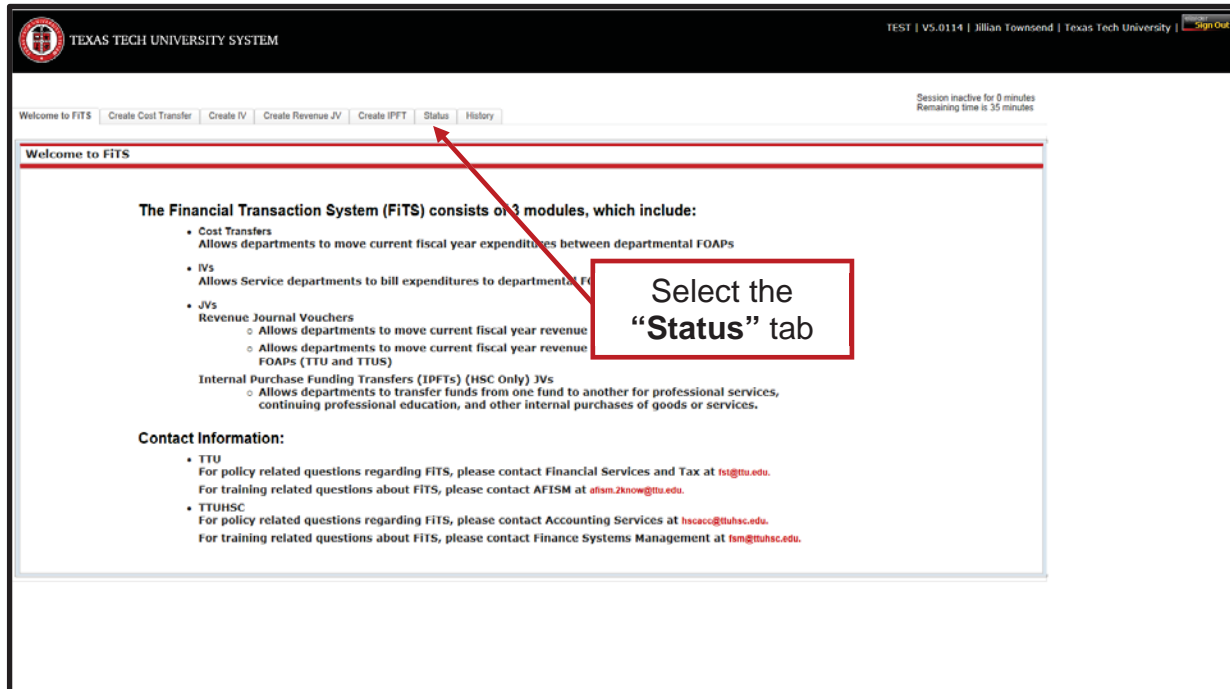
The screenshot shows a confirmation dialog box titled 'Reject' with the question 'Are you sure you wish to reject this document? by clicking YES this will reject the entire document.' The dialog has 'Yes' and 'No' buttons. The background shows the same 'Approvals' section as the previous screenshot, but it is dimmed.



Searching the Status Tab

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

To begin, click on the “**Status**” tab from the home page.



The “**Status**” tab automatically populates with all Cost Transfers for which you are the Originator or a TEAM App Financial Manager or Approver.

Users can search for a specific Cost Transfer 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 Cost Transfers 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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The screenshot shows the 'Status' page of the FITS system. Several search filters are highlighted with red boxes and arrows:

- Search by Fund & Orgn**: Points to the 'Fund' and 'Orgn' dropdown menus.
- Search by User**: Points to the 'User' search field.
- Search by Date Range**: Points to the 'Date from' and 'Date to' fields.
- Search by FITS ID**: Points to the 'FITS Id' search field.
- Search by Chart**: Points to the 'Chart' dropdown menu.

The main table displays 'Your FITS Documents' with columns: FITS ID, asc, STATUS, ORIGINATOR, LAST MOD DATE, and LAST MODIFIED BY. The table contains several rows of data, including entries for 'CT00' and 'PT000021' through 'PT000074'. Each row has 'Edit' and 'Delete' buttons.

After entering in 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.

This screenshot shows the same 'Status' page, but with the search results table populated. Two buttons are highlighted with red boxes and arrows:

- Click “Search” button**: Points to the 'Search' button.
- Click “Clear Search” button**: Points to the 'Clear Search' button.

The table shows results for 'CT01372' (Rejected) and 'CT01373' (Completed), along with other entries. The 'STATUS' column is highlighted in red.



TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER EL PASO

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.

Select Number of Results to Display

Back & Forward Arrows

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete Approvals
IV000099	Star					
IV000074	Star					
PT000021	Star					
PT000059	Started	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete
PT000072	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000073	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete

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

Narrow Results by Document Type (CT)

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete Approvals
IV000099	Star	Jillian Townsend	01 / 21 / 2014	Ricky Baker	Edit	Delete
IV000074	Star	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	Edit	Delete
PT000021	Star	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit	Delete
PT000059	Star	Jillian Townsend	01 / 22 / 2014	Jillian Townsend	Edit	Delete
PT000072	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000073	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
PT000074	Star	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete



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

The screenshot shows the 'Status' section of the FiTS system. It includes search filters for Chart, Fund, Origin, and User. Below the filters is a table titled 'Your FiTS Documents' with columns: FiTS ID asc, STATUS, ORIGINATOR, LAST MOD DATE, and LAST MODIFIED BY. A red box highlights the 'FiTS ID Document Number' column.

FiTS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend
CT001374	Completed	Jillian Townsend	01 / 22 / 2014	Jillian Townsend
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup
PT000059	Started	Jillian Townsend	01 / 22 / 2014	Jillian Townsend
PT000072	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend
PT000073	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend

The search results will also show the following columns:

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

The “**Status**” column of the search results will reflect the current stage in the FiTS process for a specific Cost Transfer. These stages include:

- **Started:** Cost Transfer has been started by the Originator, but not marked complete. If you are the Originator for a Cost Transfer, you will have the option to click the “**Edit**” button to make changes, or the “**Delete**” button to delete the Cost Transfer from FiTS.
- **Completed:** Cost Transfer has been marked complete, but not submitted to Approvals. If you are an Originator for a Cost Transfer, you will have the option to click the “**Edit**”, “**Delete**”, or “**Approvals**” buttons. Selecting the “**Approvals**” button will send the Cost Transfer into the approval process.
- **Submitted:** Cost Transfer has been submitted for approvals. If you are the Originator for the Cost Transfer, 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 Cost Transfer after clicking the “**Review**” button.



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- **Rejected:** Cost Transfer has been rejected in FiTS by a Fund Manager, Approver, or Accountant. If you are an Originator, you will have the option to “**Edit**” or “**Delete**” the Cost Transfer.
- **Errors:** Cost Transfer has incurred an error while trying to post. Please contact Financial Systems Management at FSMElp@ttuhsc.edu for assistance.

TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0114 | 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

Status

Chart: Select Chart | Fund | Orgn | User | Clear User

Date from: | Date to: | Clear Dates

FiTS Id | Search | Clear Search

Select a Document Type: ALLOC INV OPT

Select the number of rows to display: 5 10 25 50 100

Your FiTS Documents

FiTS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Review	
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker	Edit	Delete
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	Edit	Delete
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit	Delete
PT000058	Started	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Edit	Delete
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
RT000023	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
RT000024	Started	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete

[1 - 10 / 11]

Callouts: Cost Transfer Status (points to STATUS column), Cost Transfer Action Options (points to Edit/Delete buttons)

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

TEXAS TECH UNIVERSITY SYSTEM

TEST | V5.0114 | 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

Status

Chart: Select Chart | Fund | Orgn | User | Clear User

Date from: | Date to: | Clear Dates

FiTS Id | Search | Clear Search

Select a Document Type: ALLOC INV OPT

Select the number of rows to display: 5 10 25 50 100

Your FiTS Documents

FiTS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY		
CT001372	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
CT001373	Completed	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete Approvals
CT001374	Submitted	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Review	
IV000069	Started	Jillian Townsend	01 / 21 / 2014	Ricky Baker	Edit	Delete
IV000074	Started	Jillian Townsend	01 / 15 / 2014	Carole Wardroup	Edit	Delete
PT000021	Started	Jillian Townsend	01 / 27 / 2014	Carole Wardroup	Edit	Delete
PT000058	Started	Jillian Townsend	01 / 28 / 2014	Jillian Townsend	Edit	Delete
PT000074	Started	Jillian Townsend	01 / 27 / 2014	Jillian Townsend	Edit	Delete
RT000023	Rejected	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete
RT000024	Started	Jillian Townsend	01 / 17 / 2014	Jillian Townsend	Edit	Delete

[1 - 10 / 11]

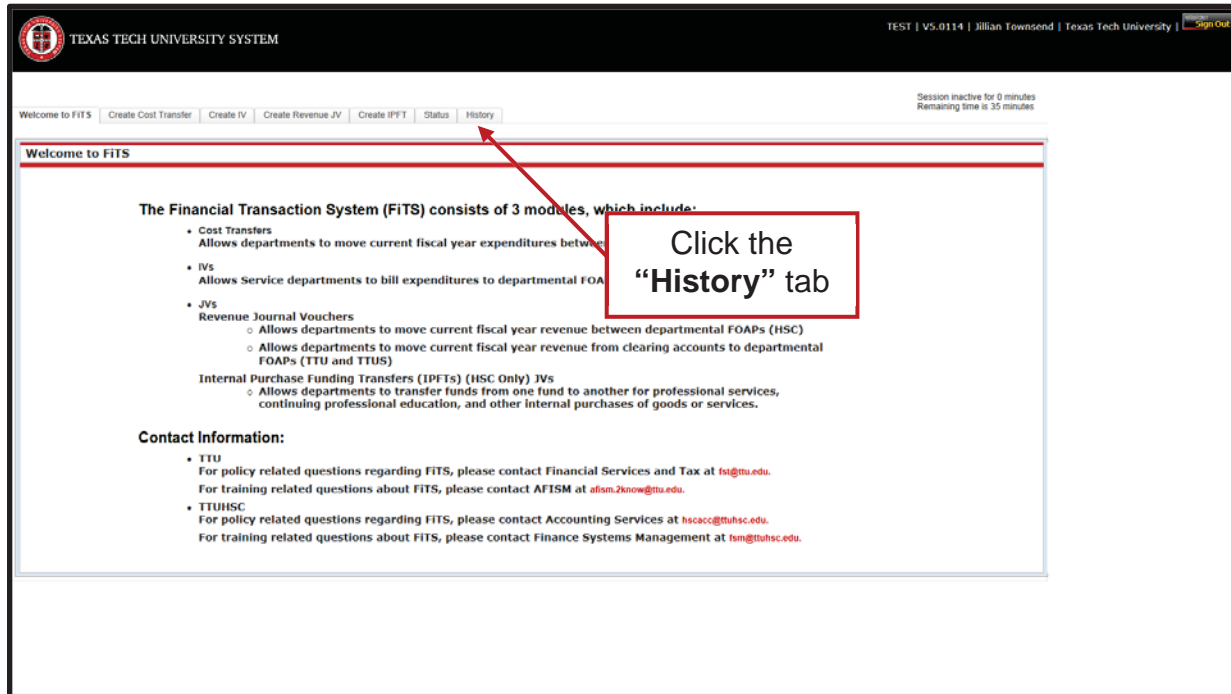
Callouts: Cost Transfer Originator (points to ORIGINATOR column), Last Modification Date & User (points to LAST MOD DATE and LAST MODIFIED BY columns)



Searching the History Tab

The **“History”** tab can be used to search for any Cost Transfer(s) that has been processed and posted.

To begin, click on the **“History”** tab from the home page of FiTS.



The **“History”** tab does not automatically populate with any Cost Transfers.

User can search for a specific Cost Transfer 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 Cost Transfers a user is involved in
- By Date Range: Returns results by date last modified
- By Transaction Date: Returns results for Cost Transfers posted by date entered
- By Doc ID: Enter all or a portion of the Banner Document ID that the Cost Transfer 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.



This screenshot shows the 'History' search interface. Red callout boxes with arrows point to the following search criteria:

- Search by Fund & Orgn**: Points to the 'Fund' and 'Orgn' dropdown menus.
- Search by User**: Points to the 'User' text input field.
- Search by Date Range**: Points to the 'Date from' and 'Date to' date pickers.
- Search by Doc ID**: Points to the 'Doc Id' text input field.
- Search by FITS ID**: Points to the 'FITS Id' text input field.
- Search by Chart**: Points to the 'Chart' dropdown menu.

The interface includes a 'Search' button and a 'Clear Search' button. A table below the search fields shows columns for FITS ID, DOC ID, ORIGINATOR, LAST MODIFIED BY, LAST MODIFIED TIME, and TRANSACTION DATE.

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.

This screenshot shows the 'History' search interface with two callout boxes:

- Click “Search” button**: Points to the 'Search' button.
- Click “Clear Search” button**: Points to the 'Clear Search' button.

The interface also shows the 'Clear User' button and the 'Clear Dates' button. The table below the search fields has the same columns as in the previous screenshot.



TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER™ EL PASO

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.

Session inactive for 12 minutes
Remaining time is 23 minutes

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

History

Chart: H Fund: Origin: User: Clear User

Date from: Date to: Trans Date: Clear Dates

Doc Id: FITS Id: Search Clear Search

Document Type: ALL CT IV RT PT

Select the number of rows to display: 5 10 25 50 100

FITS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED TIME	
CT000016	CA000001	Ida Butler	Lisa Castillo	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	CA000012	Andra Headley	Martin Kurlander	06 / 17 / 2013	View
CT000026	CA000005	Andra Headley	Andra Headley	06 / 05 / 2013	View
CT000034	CA000007	Cheri Polreisiz	Cheri Polreisiz	06 / 10 / 2013	View
CT000039	CA000009	Angela Salmon	Angela Salmon	06 / 10 / 2013	View
CT000040	CA000006	Erin Woods	Lisa Castillo	06 / 10 / 2013	View
CT000046	CA000010	Yuren Diaz	Yuren Diaz	06 / 11 / 2013	View
CT000047	CA000008	Erin Woods	Erin Woods	06 / 11 / 2013	View

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

Session inactive for 0 minutes
Remaining time is 25 minutes

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History

History

Chart: H Fund: Origin: User: Clear User

Date from: Date to: Trans Date: Clear Dates

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CT000039	CA000009	Angela Salmon	Angela Salmon	06 / 10 / 2013	View
CT000040	CA000006	Erin Woods	Lisa Castillo	06 / 10 / 2013	View
CT000046	CA000010	Yuren Diaz	Yuren Diaz	06 / 11 / 2013	View
CT000047	CA000008	Erin Woods	Erin Woods	06 / 11 / 2013	View

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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 Cost Transfer
- The User who last modified the Cost Transfer
- The Date of the last modification to the Cost Transfer
- The Date the Cost Transfer was processed and posted

To view the detail of the processed Cost Transfer, click the **“View”** button.

The screenshot shows the 'History' page of the Texas Tech University System. It features a search interface at the top with fields for Chart, Fund, Origin, User, Date from, Date to, and Trans Date. Below the search is a table with the following columns: FiTS ID asc, DOC ID, ORIGINATOR, LAST MODIFIED BY, LAST MODIFIED TIME, and TRANSACTION DATE. Each row in the table has a 'View' button to its right. Red boxes with arrows point to specific elements: 'FiTS ID Document Number' points to the FiTS ID column; 'Click "View"' points to a 'View' button; 'Posting Date' points to the TRANSACTION DATE column; 'Last Modification Date & User' points to the LAST MODIFIED TIME and LAST MODIFIED BY columns; 'CT Originator' points to the ORIGINATOR column; and 'Doc ID Number' points to the DOC ID column.

FiTS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED TIME	TRANSACTION DATE
CT000016	CA000001	Ida Butler	Lisa Castillo	06/03/2013	
CT000017	CA000004	Vicki Clayton	Michael Burns	06/05/2013	
CT000019	CA000003	Vicki Clayton	Vicki Clayton	06/03/2013	
CT000025	CA000012	Andra Headley	Marlin Hefander	06/17/2013	
CT000026	CA000005	Andra Headley	Andra Headley	06/05/2013	
CT000034	CA000007	Cheri Poltreitz	Cheri Poltreitz	06/10/2013	
CT000039	CA000009	Angela Salmon	Angela Salmon	06/10/2013	
CT000040	CA000006	Erin Woods			
CT000045	CA000010	Yusen Diaz			

If you have a policy question regarding the Cost Transfer process, please contact Accounting Services at accountingelp@ttuhsc.edu.

If you have a training question about FiTS, please contact Finance Systems Management at FSMElp@ttuhsc.edu.