



Financial Transaction System (FiTS) - IVs

The IV module of the Financial Transactions System (FiTS) allows Service departments (funds beginning with 19) to bill for goods and services provided to other 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.

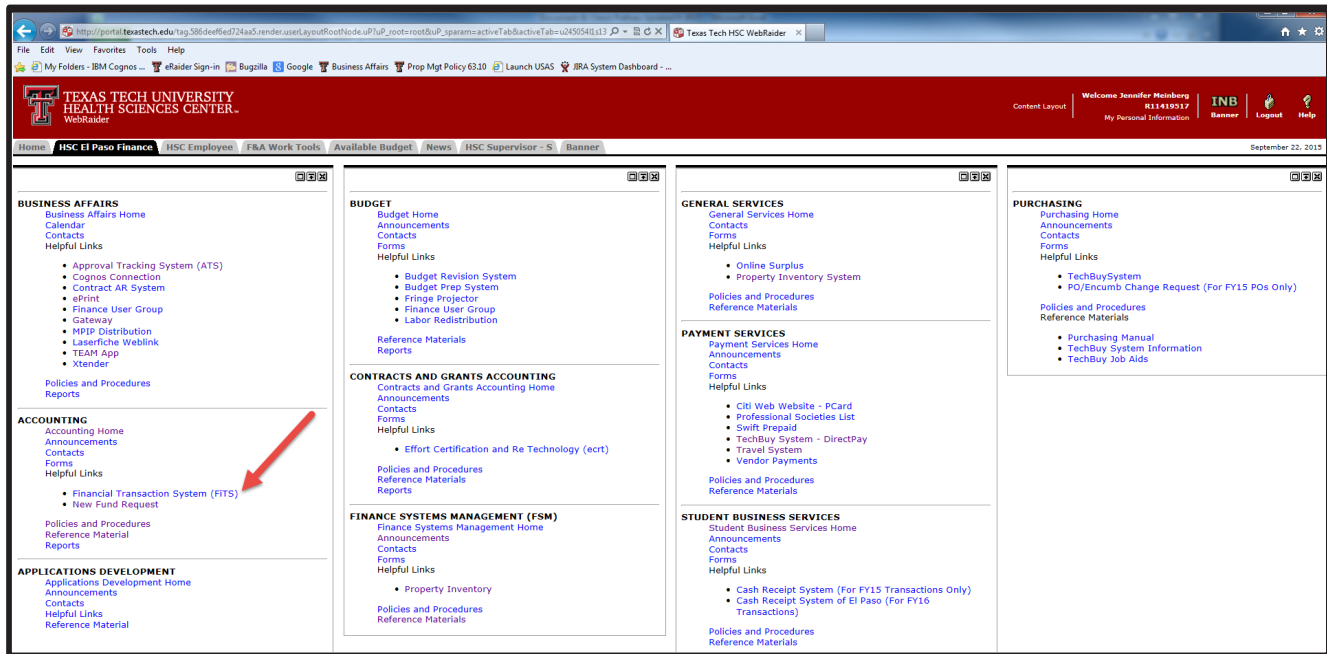
After submission, the system will load the IV to Banner. Transaction tracking, archiving, and retrieving of information related to the IV is managed within the system as well.

FiTS replaces the IV templates that are normally submitted through the Gateway system.

FiTS allows a Service department to do the following:

- Start an IV
- Resume completion of an IV
- Submit an IV
- Review the Status of an IV
- Review the History of an IV

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





Creating an IV

To begin an IV, click on the **“Create IV”** tab at the top of the webpage.

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](#)

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 departmental FOAPs
- IVs
Allows Service departments to bill expenditures to departmental FOAPs
- JVs
Revenue Journal Vouchers
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 (IPFTs) (HSC Only) JVs
Allows departments to transfer funds from one fund to another for professional services, 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 fst@ttu.edu.
For training related questions about FITS, please contact AFISM at afism.2know@ttu.edu.
- TTUHSC
For policy related questions regarding FITS, please contact Accounting Services at hscacc@ttuhsc.edu.
For training related questions about FITS, please contact Finance Systems Management at fsm@ttuhsc.edu.

Select the System ID you would like to bill on from the drop down box labeled “Select System ID”. This drop down box will be populated with all System IDs that you are currently authorized to use to bill.

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Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

IV Select

Select System ID

- Select System ID
- HCUSTSVC
- HLIBRARY
- HLPHARSV
- HMEDPHOT
- HMOPHAR
- HSCLLARC
- HTELEVOX

Select System ID



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Once a System ID is selected, the screen will display the “Revenues” and “Expenses” sections where the service billing information can be entered. In the “Revenues” section the “Non Inter Chart” radio button signifies that all the expense lines will be on Chart E FOPs. The “Inter Chart” radio button signifies that at least one expense line will be on a chart other than E.

The “Non Inter Chart” radio button is automatically selected by the system. Before this can be changed, a revenue line must be entered. Select the appropriate chart and enter the revenue FOAP, description, and amount.

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 15 minutes
Remaining time is 17 minutes

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
Select User: [Dropdown]
IV Request Id: [Text]

New Description: [Text]
Replace Description: [Text]
Replace Entire Description: Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 0.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|--------|------|------|------|------|-------------|--------|-------|
| Select | | | | | | | C |

Expenses

Expense Total Amount: 0.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|------|------|------|------|-------------|--------|-------|
| | | | | | | | |

Save As Template | Delete Template

Click the “**Add**” button to add the revenue line to your service billing.

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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 2 minutes
Remaining time is 33 minutes

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
Select User: [Dropdown]
IV Request Id: [Text]

New Description: [Text]
Replace Description: [Text]
Replace Entire Description: Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 0.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C |

Expenses

Expense Total Amount: 0.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|------|------|------|------|-------------|--------|-------|
| | | | | | | | |

Save As Template | Delete Template



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After the revenue line is added, an IV Request ID (FiTS ID) is assigned. The FiTS ID can be used to track your IV in the “Status” and “History” tabs.

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 4 minutes
Remaining time is 31 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT

Select User

IV Request ID **IV000096**

New Description

Replace Description

Replace Entire Description [Edit](#)

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 1.00Credits do not equal the Debits

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|---|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C | Edit Delete |
| H | | | | | | | C | Add Clear |

Expenses

At this time, or at any time during the data entry, if your service billing needs to include Inter Chart expenses, the “Inter Chart” radio button can be selected.

After you have entered the revenue line for your billing, you can continue to the “Expenses” section of the IV. In this section, you will enter each department FOAP that you will be charging for goods or services provided. Enter the FOAP, description of expense, and amount to be billed in the respective fields.

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Welcome to FiTS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 8 minutes
Remaining time is 27 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT

Select User

IV Request ID **IV000096**

New Description

Replace Description

Replace Entire Description [Edit](#)

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 1.00Credits do not equal the Debits

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|---|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C | Edit Delete |
| H | | | | | | | C | Add Clear |

Expenses

Expense Total Amount: 0.00Debits do not equal the Credits

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|------|------|------|------|-------------|--------|-------|---|
| H | | | | | | | D | Add Clear |

[Save As Template](#) [Delete Template](#)



TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER EL PASO

Click the **“Add”** button to add the expense line to your service billing. Continue adding lines until all of the departmental FOAPs you are billing have been added.

TEXAS TECH UNIVERSITY SYSTEM

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

Session inactive for 10 minutes
Remaining time is 25 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT
Selected User
IV Request is **IV000096**

New Description
Replace Description
Replace Entire Description Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: **1.00** Credits do not equal the Debits

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | | |
|-------|--------|--------|--------|------|-------------|--------|-------|------|--------|
| H | 191006 | 511541 | 530500 | 5V | Test | 1.00 | C | Edit | Delete |
| H | | | | | | | C | Add | Clear |

Expenses

Expense Total Amount: **0.00** Debits do not equal the Credits

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | | |
|-------|--------|--------|--------|------|-------------|--------|-------|-----|-------|
| H | 151001 | 351605 | 727300 | 40 | Test | 50 | D | Add | Clear |

Save As Template | Delete Template

Click **“Add”** to add an expense line

When adding expense FOAPs to your billing, the system will notify you of FOAPs that do not have available budget to cover the amount you are billing by displaying the following error when you try to **“Add”** the line.

TEXAS TECH UNIVERSITY SYSTEM

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

Session inactive for 14 minutes
Remaining time is 21 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT
Selected User
Select Template
IV Request is **IV000096**

New Description
Replace Description
Replace Entire Description Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: **1.00**

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | | |
|-------|--------|--------|--------|------|-------------|--------|-------|------|--------|
| H | 191006 | 511541 | 530500 | 5V | Test | 1.00 | C | Edit | Delete |
| H | | | | | | | C | Add | Clear |

Expenses

Expense Total Amount: **1.00**

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | | |
|-------|--------|--------|--------|------|-------------|-----------|-------|------|--------|
| H | 151001 | 351605 | 727300 | 40 | Test | 9.50 | D | Edit | Delete |
| H | 151013 | 351241 | 727300 | 40 | Test | 9.50 | D | Edit | Delete |
| H | 211313 | 512201 | 727300 | 10 | Test | 10,000.00 | D | Add | Clear |

Save As Template | Delete Template

Document IV000096 has this error -
*Error *Not enough available funds for H 211313 512201 7010 10 in fiscal year 14
The available balance is 5064.95
Click OK and then fix the errors.

OK



If you receive a budget error, the popup message will indicate the FOAP with the error. You will need to contact the department responsible for the FOAP and request a Budget Revision (BR) be submitted through the online Budget Revision System to budget funds in the proper Budget Account Code (BAC) in order for the line to be added. The FOAP cannot be added to the IV until the BR has been processed and there is sufficient budget to cover the expense.

Non Inter Chart and Inter Chart expense FOAPs can be combined on one service billing IV.

In order to add Inter Chart expense lines to the billing, you must select the **“Inter Chart”** radio button.

IV Select

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 1.00

| CHART | FUND | ORGN | ACCT | PRG | DESCRIPTION | AMOUNT | D/C |
|-------|--------|--------|--------|-----|-------------|--------|-----|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C |
| H | | | | | | | C |

Expenses

Expense Total Amount: 1.00

| CHART | FUND | ORGN | ACCT | PRG | DESCRIPTION | AMOUNT | D/C |
|-------|--------|--------|--------|-----|-------------|--------|-----|
| H | 151001 | 351605 | 727300 | 40 | Test | 0.50 | D |
| H | 151013 | 351241 | 727300 | 40 | Test | 0.50 | D |
| H | | | | | | | D |

Once the **“Inter Chart”** radio button has been selected, you can begin entering the Inter Chart expense FOAPs.

To add an **“Inter Chart”** expense line, you will first need to select the chart that corresponds to the FOAP you are billing. You can then enter the **“Inter Chart”** expense FOAP, description, and amount.

When an **“Inter Chart”** expense line is added, a revenue line will be automatically added to the **“Revenues”** section of the IV. This is done in order to apply the correct rule codes (HX6 or HX9) to the entry behind the scenes depending on which chart(s) are being billed.



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TEXAS TECH UNIVERSITY SYSTEM

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Welcome to FITS | [Create Cost Transfer](#) | [Create IV](#) | [Create Revenue JV](#) | [Create IPFT](#) | [Status](#) | [History](#)

Session inactive for 28 minutes
Remaining time is 7 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
Select User: [Dropdown]
Select Template: [Dropdown]
IV Request Id: **IV000096**

New Description: [Text Field]
Replace Description: [Text Field]
Replace Entire Description: Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: **2.00**

| CHART | FUND | ORGN | ACCT | PRDG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|--------------------------|--------|-------|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C |
| H | 191006 | 511541 | 530500 | SV | INTER CHART T - IV000096 | 1.00 | C |

Expenses

Expense Total Amount: **2.00**

| CHART | FUND | ORGN | ACCT | PRDG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 151001 | 351605 | 727300 | 40 | Test | 0.50 | D |
| H | 151013 | 351241 | 727300 | 40 | Test | 0.50 | D |
| T | 16A050 | 859000 | 7H0026 | 100 | Test | 1.00 | D |

Select: [Dropdown] [Add] [Clear]

Save As Template | Delete Template

Corresponding "Inter Chart" Revenue & Expense lines

The revenue line(s) will be automatically adjusted as you add "Inter Chart" expense lines to the billing so that the total of the "Inter Chart" revenue lines equals the total amount of all of the "Inter Chart" expense lines.

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 28 minutes
Remaining time is 27 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
Select User: [Dropdown]
Select Template: [Dropdown]
IV Request Id: **IV000096**

New Description: [Text Field]
Replace Description: [Text Field]
Replace Entire Description: Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: **3.50**

| CHART | FUND | ORGN | ACCT | PRDG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|--------------------------|--------|-------|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C |
| H | 191006 | 511541 | 530500 | SV | INTER CHART T - IV000096 | 2.00 | C |
| H | 191006 | 511541 | 530500 | SV | INTER CHART S - IV000096 | 0.50 | C |

Expenses

Expense Total Amount: **3.50**

| CHART | FUND | ORGN | ACCT | PRDG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 151001 | 351605 | 727300 | 40 | Test | 0.50 | D |
| H | 151013 | 351241 | 727300 | 40 | Test | 0.50 | D |
| T | 16A050 | 859000 | 7H0026 | 100 | Test | 1.00 | D |
| S | 16A001 | P00011 | 7H0026 | 600 | Test | 0.50 | D |
| T | 16A050 | 859000 | 7H0026 | 100 | Test | 1.00 | D |

Select: [Dropdown] [Add] [Clear]

Save As Template | Delete Template



TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER EL PASO

The “Inter Chart” revenue line(s) are automatically given a system generated description referencing the chart that is being billed, along with the FITS ID number of the IV. This description can easily be changed, if needed, using the “Edit” button to the right of the revenue line(s).

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History | Remaining time is 27 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
Select User: [Dropdown]
Select Template: [Dropdown]
IV Request Id: IV000096

New Description: [Text Field]
Replace Description: [Text Field]
Replace Entire Description Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 3.50

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|--------------------------|--------|-------|------|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C | Edit |
| H | 191006 | 511541 | 530500 | SV | INTER CHART T - IV000096 | 2.00 | C | Edit |
| H | 191006 | 511541 | 530500 | SV | INTER CHART S - IV000096 | 0.50 | C | Edit |

Expenses

Expense Total Amount: 3.50

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|-------------|
| H | 151001 | 351605 | 727300 | 40 | Test | 0.50 | D | Edit Delete |
| H | 151013 | 351241 | 727300 | 40 | Test | 0.50 | D | Edit Delete |
| T | 16A050 | 859000 | 7H0026 | 100 | Test | 1.00 | D | Edit Delete |
| S | 16A001 | P00011 | 7H0026 | 600 | Test | 0.50 | D | Edit Delete |
| T | 16A050 | 859000 | 7H0026 | 100 | Test | 1.00 | D | Edit Delete |

Select: [Dropdown] [Add] [Clear]

Save As Template | Delete Template

Select the “Edit” button

One you have edited the description, click the “Save” button.

Welcome to FITS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status | History | Remaining time is 21 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
Select User: [Dropdown]
Select Template: [Dropdown]
IV Request Id: IV000096

New Description: [Text Field]
Replace Description: [Text Field]
Replace Entire Description Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 3.50

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|-------------|
| H | 191006 | 511541 | 530500 | SV | Test | 1.00 | C | |
| H | 191006 | 511541 | 530500 | SV | Test | 2.00 | C | |
| H | 191006 | 511541 | 530500 | SV | Test | 0.50 | C | Save Cancel |

Expenses

Expense Total Amount: 3.50

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|-------------|
| H | 151001 | 351605 | 727300 | 40 | Test | 0.50 | D | Edit Delete |
| H | 151013 | 351241 | 727300 | 40 | Test | 0.50 | D | Edit Delete |
| T | 16A050 | 859000 | 7H0026 | 100 | Test | 1.00 | D | Edit Delete |
| S | 16A001 | P00011 | 7H0026 | 600 | Test | 0.50 | D | Edit Delete |
| T | 16A050 | 859000 | 7H0026 | 100 | Test | 1.00 | D | Edit Delete |

Select: [Dropdown] [Add] [Clear]

Save As Template | Delete Template

Edit Description and Click “Save”



TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER EL PASO

Once you have entered all of the necessary revenue and expense lines to complete your service billing, you will need to make sure that the Revenue Total Amount (Credits) equals the Expense Total Amount (Debits). If they do not equal, you will see the following message.

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

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT
Select User
Select Template
IV Request Id **IV000096**

New Description
Replace Description
Replace Entire Description Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: **2.00 Credits do not equal the Debits**

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 191006 | 511541 | 530500 | SV | Test | | |
| H | | | | | | | |

Expenses

Expense Total Amount: **1.50 Debits do not equal the Credits**

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 151001 | 351605 | 727300 | 40 | Test | 0.50 | D |
| H | 151013 | 351241 | 727300 | 40 | Test | 1.00 | D |
| H | | | | | | | |

Save As Template | Delete Template

Confirm that Revenues = Expenses

If you are billing during the 10 day period at the beginning of a month, you will have the option to back date the billing in order for it to be posted in the prior month. You will need to select either the “Prior EOM” (End of Month) or “Current Date” radio button.

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 6 minutes
Remaining time is 29 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT
Select User
Select Template
IV Request Id **IV000096**

Posting Date: Prior EOM Current Date 10/01/2013

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: **2.00**

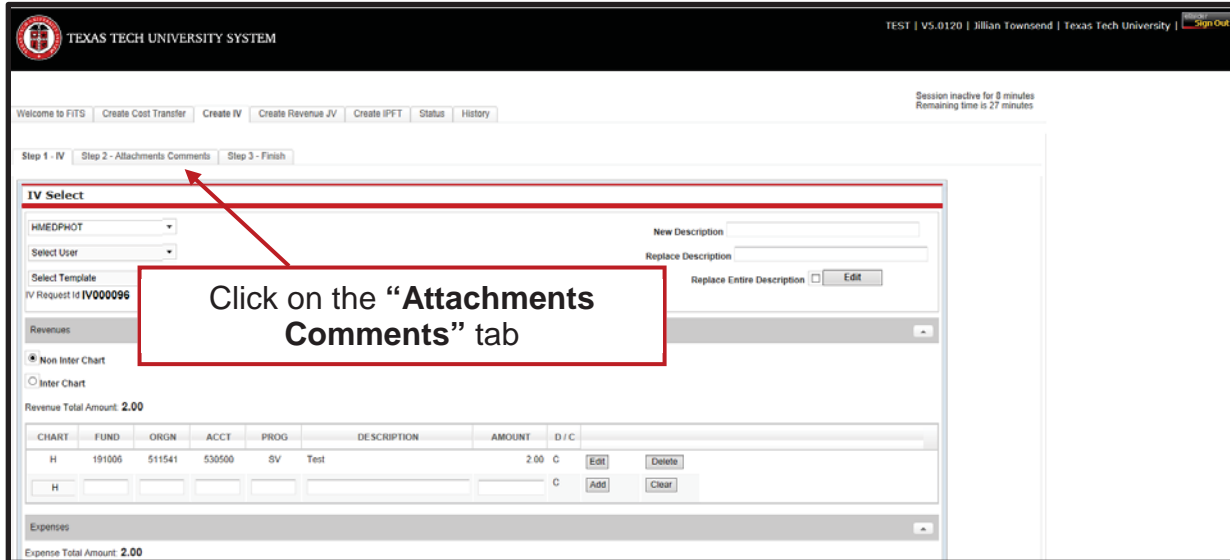
| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 191006 | 511541 | 530500 | SV | Test | 2.00 | C |
| H | | | | | | | |

Save As Template | Delete Template

Select Current Date or Prior End of Month

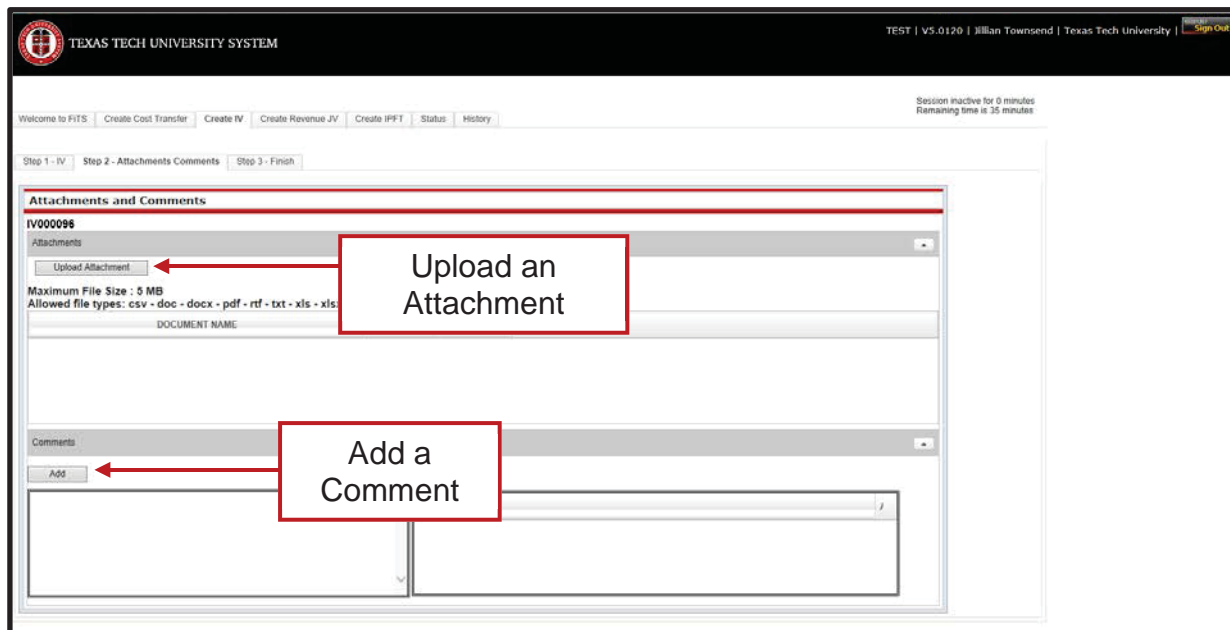


Once you have confirmed the Revenue Total Amount is equal to the Expense Total Amount, you can continue to the **“Step 2 – Attachments Comments”** tab.



In the “Attachments” section, you can upload attachment(s) (in one of the allowed file types) to provide additional information regarding the IV if needed.

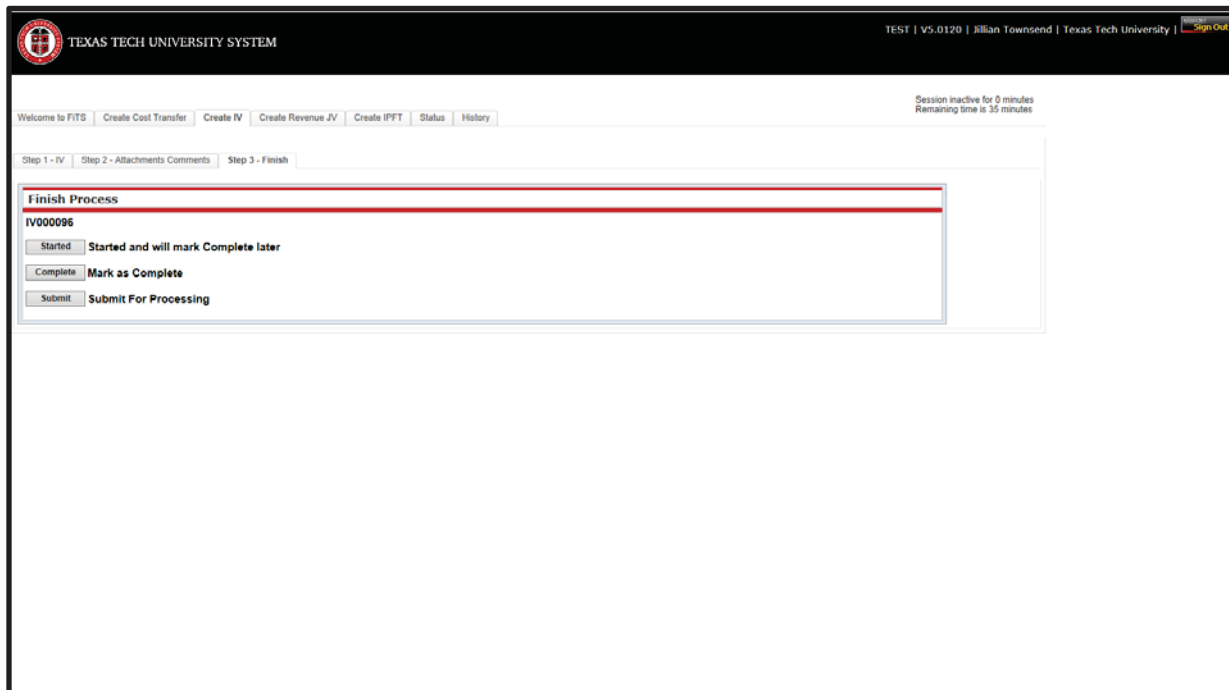
To add a comment, type the text into the box, then click the “Add” button to save the comment.





Once you have added any optional attachments or comments you can 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 IV as complete.
 - o Once clicked, it will take you back to a blank “**Step 1 - IV**” tab to begin a new IV if desired.
 - o To mark the IV as Complete after clicking this option, search for the IV in the “**Status**” tab (instructions located below).
- Mark as Complete
 - o Clicking this button marks the IV as complete in the system, but will not submit the IV for processing.
 - o To submit the IV for processing after clicking this option, search for the IV in the “**Status**” tab (instructions located below).
- Submit For Processing
 - o Clicking this button will send the IV for processing through Gateway.



If you select “**Mark as Complete**”, this does not send the IV for processing. In order to send the IV for processing, navigate to the “**Status**” tab and locate your IV by the FiTS ID. Once located, select the “**Submit**” button.



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 2 minutes
Remaining time is 33 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: ALL CT IV 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 | | |
| IV000096 | Completed | Jillian Townsend | 02 / 24 / 2014 | Jillian Townsend | Edit | Delete | Submit |
| PT000095 | 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 | |

Select "Submit"

Confirmation of Posting

After the IV has been submitted for processing, you can navigate to the **"Status"** tab to confirm that the IV has posted with no errors. If the IV is not present in the **"Status"** tab, the IV has successfully posted through Gateway. If the IV remains in the **"Status"** tab, it will have an error to the right stating "Errors in Gateway – Review Eprint".

TEXAS TECH UNIVERSITY SYSTEM

TEST | 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 2 minutes
Remaining time is 33 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: ALL CT IV JV

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 | | | |
|-------------|-----------|------------------|----------------|------------------|--------|--------|-----------------------------------|
| CT000328 | Submitted | Ricky Baker | 05 / 23 / 2013 | Ricky Baker | Review | | |
| CT000332 | Submitted | Jillian Townsend | 05 / 22 / 2013 | Jillian Townsend | Review | | |
| CT000336 | Submitted | Jillian Townsend | 05 / 22 / 2013 | Jillian Townsend | Review | | |
| CT000358 | Submitted | Ricky Baker | 05 / 21 / 2013 | Ricky Baker | Review | | |
| CT000373 | Submitted | Jillian Townsend | 08 / 19 / 2013 | Jillian Townsend | Review | | |
| CT000396 | Submitted | Ricky Baker | 06 / 17 / 2013 | Ricky Baker | Review | | |
| CT000407 | Submitted | Ricky Baker | 06 / 20 / 2013 | Ricky Baker | Review | | |
| CT000456 | Submitted | Jillian Townsend | 09 / 17 / 2013 | Jillian Townsend | Review | | |
| CT000457 | Errors | Jillian Townsend | 09 / 16 / 2013 | Jillian Townsend | Edit | Delete | Errors in Gateway - Review Eprint |
| IV000162 | Completed | Jillian Townsend | 09 / 24 / 2013 | Jillian Townsend | Edit | Delete | Submit |

Error Message



If an error message is shown in the “**Status**” tab for the IV that was submitted, you can access the ePrint report in order to determine the specific reason for the error.

If the IV has successfully posted, you can access the ePrint report to determine the Document ID given for the service billing.

You can access ePrint reports from the Webraider Portal on the HSC El Paso Finance tab under Business Affairs. Sign into ePrint using your Oracle User ID and password and select the GateWay TTUSPRD repository. Once in ePrint, locate your System ID and click on the drill icon. All of the IVs loaded under this System ID will be displayed. Select the desired report(s).

The **day after** you submit your IV, access Cognos from the Webraider Portal on the HSC El Paso Finance tab. Click on Cognos Connection in the Business Affairs section of the HSC El Paso Finance tab.

Once in Cognos, click on IBM Cognos Content in the My Content Section. Go to HSC El Paso Finance > Transaction Detail > Operating Ledger Transaction Search Query.

Choose the Begin and End Fiscal Periods (FP) that include the transaction date of your billing. In the Document field, enter the Doc ID that was generated when the billing was uploaded. You can see each line of the documents for the date range that you queried after the report has ran. Once run, the report will open as an Excel document.

*FiTS currently has restrictions placed on all IV billings. Only IVs crediting (C) the Service Department (19XXXX) and debiting (D) the other funds to be charged will be allowed to load.

Any reversals required will need to be submitted to the Accounting Services department at AccountingElp@ttuhsc.edu. When requesting the reversal, the following documentation will need to be included in the request:

- A copy of the original ePrint report of the billing to be reversed
- If a partial reversal is needed, you must indicate the line(s) that need to be reversed
- A detailed explanation for why the billing needs to be reversed

Creating/Editing a Template

The IV module of FiTS offers the ability to save a current billing as a template for future billings. This option will allow departments that have similar billings each month to edit a prior billing as necessary in order to avoid creating a new billing each month from scratch.

In order to save a current IV as a template for future use, add all of the lines you would like included in the template. When this is complete, enter a Template Title into the text box next to the “**Save As Template**” button.



Then click the **“Save As Template”** button to save the template. Saved templates can be used by anyone with access to the System ID.

Click **“Save As Template”** button

Add a Template Title

After clicking the **“Save As Template”** button, a popup message will notify you that your template has been successfully saved.

To find a saved template to start a new billing, click on the drop down box below the **“Select System ID”** box at the top of the **“Step 1 – IV”** tab. Then select the user whose template you want to use from the **“Select User”** drop down box.



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

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT

Select User

Select User

AZT989 - Jillian Townsend

New Description

Replace Description

Replace Entire Description Edit

Revenue

Non Inter Chart

Inter Chart

Revenue Total Amount: 0.00

CHART FUND

Select

Expenses

Expense Total Amount: 0.00

CHART FUND ORGN ACCT PROG DESCRIPTION AMOUNT D / C

Save As Template

Delete Template

Next select the template you would like to use from the **“Select Template”** drop down box.

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 2 minutes
Remaining time is 33 minutes

Step 1 - IV | Step 2 - Attachments Comments | Step 3 - Finish

IV Select

HMEDPHOT

AZT989 - Jillian Townsend

Select Template

Select Template

Jillian's Template

Template 1

New Description

Replace Description

Replace Entire Description Edit

Revenue

Non Inter Chart

Inter Chart

Revenue Total Amount: 0.00

CHART FUND

Select

Expenses

Expense Total Amount: 0.00

CHART FUND ORGN ACCT PROG DESCRIPTION AMOUNT D / C

Save As Template

Delete Template

Once a template has been selected, the IV will populate with the lines that were included when the template was saved and a new FITS ID number will be assigned.

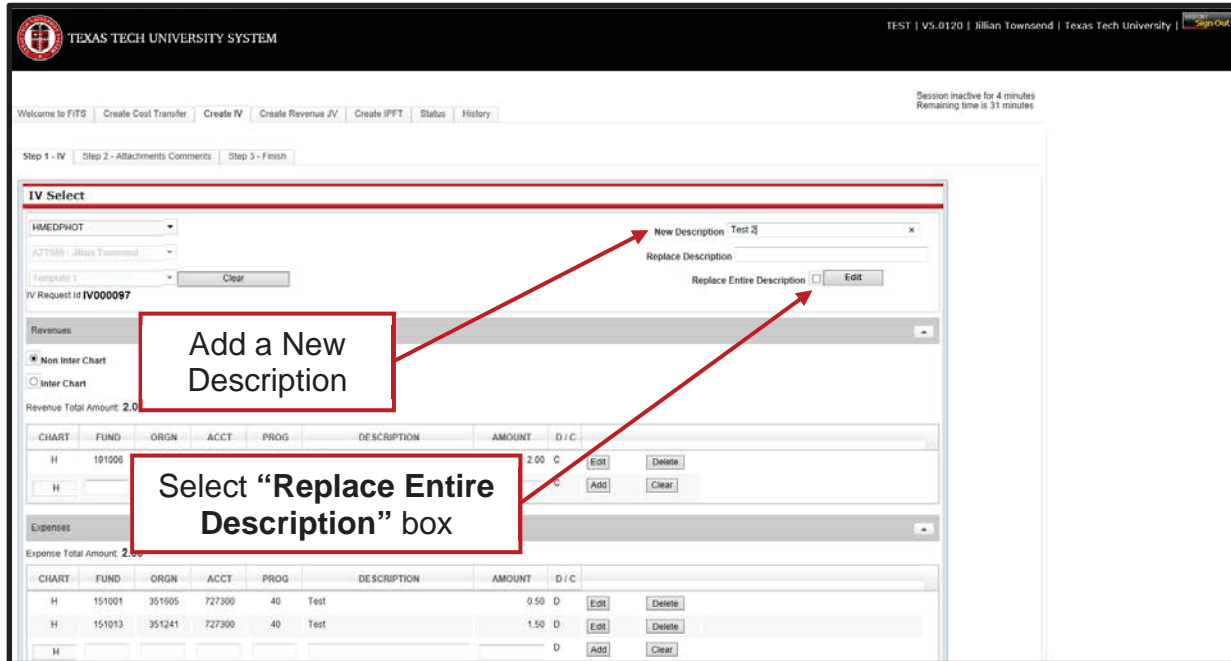
To edit the descriptions of the existing lines of the template selected, you can utilize the edit description feature at the top right corner of the IV. This feature allows users to replace all or



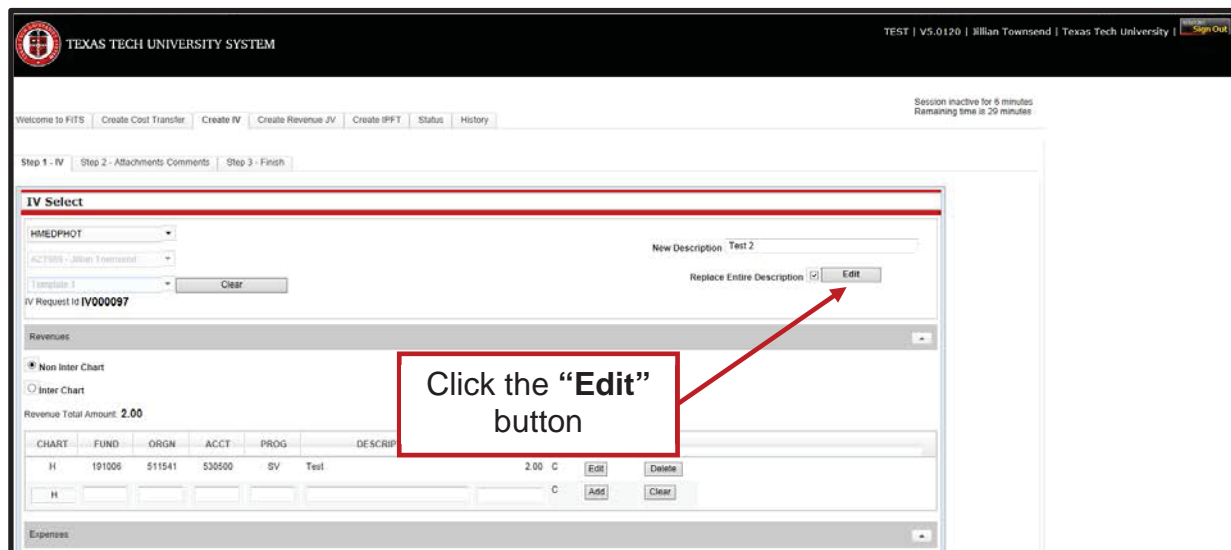
TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER™ EL PASO

part of the description line with a new description. You can also edit a line's description by clicking the **“Edit”** button to the right of a specific line.

In order to replace all of the line descriptions at once, you will need to enter the new description into the **“New Description”** text box and click the **“Replace Entire Description”** box.



Click the **“Edit”** button for the description changes to go into effect.





After clicking the “**Edit**” button the new description will be reflected in the Description column of the IV.

IV Select

HMEDPHOT

ACT1000 - Jillian Townsend

Template 1

IV Request Id IV000097

Revenues

Non Inter Chart

Inter Chart

Revenue Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 101006 | 511541 | 530500 | SV | Test 2 | 2.00 | C |
| H | | | | | | | C |

Expenses

Expense Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 151001 | 351605 | 727300 | 40 | Test 2 | 0.50 | D |
| H | 151013 | 351241 | 727300 | 40 | Test 2 | 1.50 | D |
| H | | | | | | | D |

Save As Template | Template 1 | Delete Template

In order to replace a portion of an existing description, you will need to enter the portion of the new description you would like to add into the “New Description” text box, and also enter the portion of the old description you want replaced into the “Replace Description” text box.

IV Select

HMEDPHOT

ACT1000 - Jillian Townsend

Template 1

IV Request Id IV000097

Revenues

Non Inter Chart

Inter Chart

Revenue Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|------|------|------|-------------|--------|-------|
| H | 191005 | | | | | 2.00 | C |
| H | | | | | | | C |

Expenses

Expense Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|------|------|------|------|-------------|--------|-------|
| | | | | | | | |



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Click the **“Edit”** button for the description changes to go into effect.

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 15 minutes
Remaining time is 19 minutes

Step 1 - IV Step 2 - Attachments Comments Step 3 - Finish

IV Select

HMDPHOT
ATTEND - Alan Townsend
Template 1
IV Request id **IV000097**

New Description A
Replace Description x
Replace Entire Description **Edit**

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCR | AMOUNT | D / C |
|-------|--------|--------|--------|------|--------|--------|-------|
| H | 191006 | 511541 | 530500 | SV | Test 2 | | |
| H | | | | | | | |

Expenses

Expense Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 151001 | 351605 | 727300 | 40 | Test 2 | 0.50 | D |
| H | 151013 | 351241 | 727300 | 40 | Test 2 | 1.50 | D |
| H | | | | | | | |

Save As Template Template 1 Delete Template

After clicking the **“Edit”** button the new description will be reflected in the Description column of the IV.

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 15 minutes
Remaining time is 19 minutes

Step 1 - IV Step 2 - Attachments Comments Step 3 - Finish

IV Select

HMDPHOT
ATTEND - Alan Townsend
Template 1
IV Request id **IV000097**

New Description
Replace Description
Replace Entire Description **Edit**

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 191006 | 511541 | 530500 | SV | Test A | 2.00 | C |
| H | | | | | | | |

Expenses

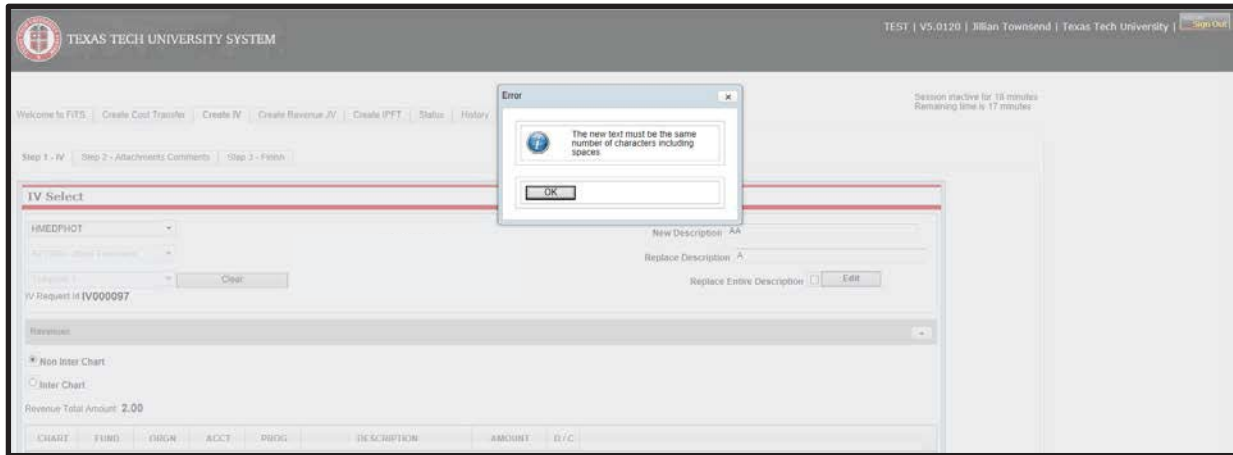
Expense Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|--------|--------|--------|------|-------------|--------|-------|
| H | 151001 | 351605 | 727300 | 40 | Test A | 0.50 | D |
| H | 151013 | 351241 | 727300 | 40 | Test A | 1.50 | D |
| H | | | | | | | |

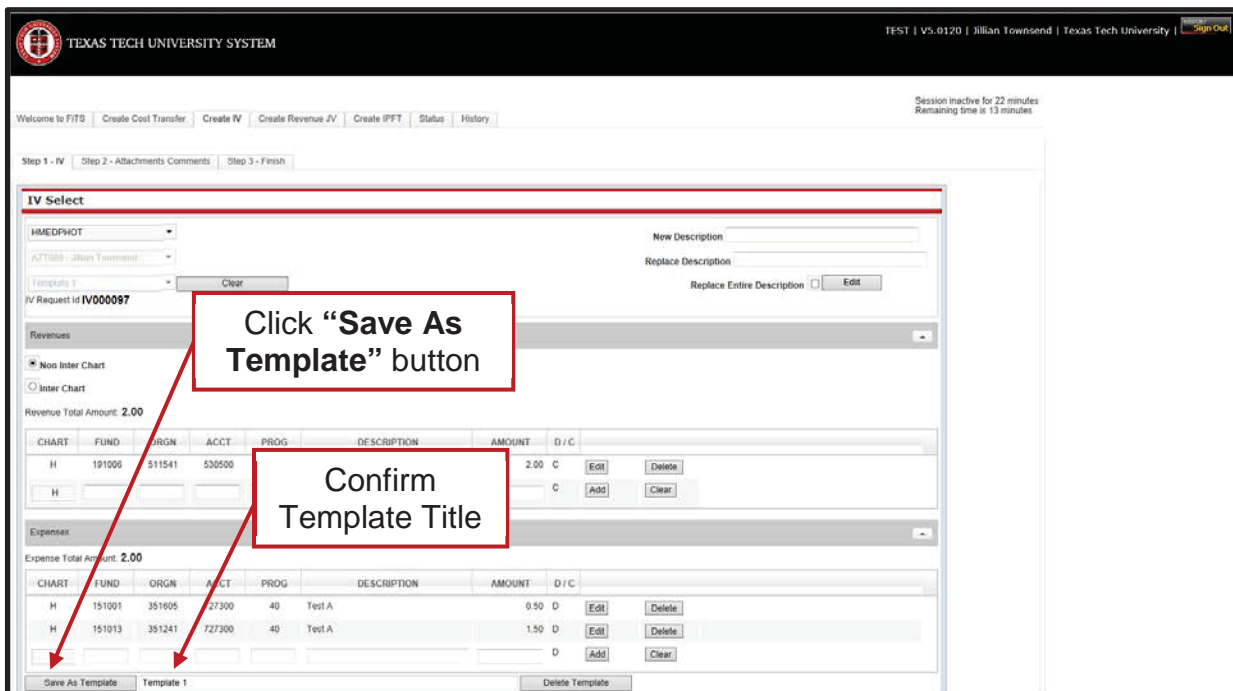
Save As Template Template 1 Delete Template



When replacing a portion of a description, the feature only allows the user to replace the part of the description with an equal number of characters. For example, replacing the letter “A” in the above screen shot with “AA” is not allowable. You will only be permitted to replace “A” with a single character. If your replacement description is unallowable, FiTS will show the following popup error after you click the “**Edit**” button.



After editing your existing template, if you would like to save the most recent changes, review the template name at the bottom of the screen and confirm that the template name to be saved is populated in the text box next to the “**Save Template**” button. Then click the “**Save As Template**” button.





Deleting a Template

To delete a saved template, you will click on the drop down box below the “Select System ID” box at the top of the “**Step 1 – IV**” tab. Then select your User ID from the “**Select User**” drop down box.

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

Step 1 - IV Step 2 - Attachments Comments Step 3 - Finish

IV Select

HMEDPHOT
Select User
AZT989 - Jillian Townsend

New Description
Replace Description
Replace Entire Description Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 0.00

CHART FUND
Select

Expenses

Expense Total Amount: 0.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|------|------|------|------|-------------|--------|-------|
|-------|------|------|------|------|-------------|--------|-------|

Save As Template Delete Template

Click on the “**Select User**” drop down box

Next select the template you would like to delete from the “**Select Template**” drop down box.

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 2 minutes
Remaining time is 32 minutes

Step 1 - IV Step 2 - Attachments Comments Step 3 - Finish

IV Select

HMEDPHOT
AZT989 - Jillian Townsend

New Description
Replace Description
Replace Entire Description Edit

Select Template
Jillian's Template
Template 1

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 0.00

CHART FUND
Select

Expenses

Expense Total Amount: 0.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C |
|-------|------|------|------|------|-------------|--------|-------|
|-------|------|------|------|------|-------------|--------|-------|

Save As Template Delete Template

Click on the “**Select Template**” drop down box



TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER™ EL PASO

After selecting the template to be deleted, review the template name at the bottom of the screen and confirm that the template name to be deleted is populated in the text box next to the “Save As Template” button. Then click the **“Delete Template”** button.

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 4 minutes
Remaining time is 31 minutes

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
ACTION: [Dropdown]
Template 1: [Dropdown] Clear
IV Request ID: IV000098

New Description: [Text Box]
Replace Description: [Text Box] Replace Entire Description [] Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|-------------|
| H | 191000 | 511541 | 530500 | | | 2.00 | C | Edit Delete |
| H | | | | | | | C | Add Clear |

Expenses

Expense Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|-------------|
| H | 151001 | 351605 | 27300 | 40 | Test | 0.50 | D | Edit Delete |
| H | 151013 | 351241 | 727300 | 40 | Test | 1.50 | D | Edit Delete |
| H | | | | | | | D | Add Clear |

Save As Template: Template 1 Delete Template

After clicking the **“Delete Template”** button, a popup message will appear to confirm, that you are sure you want to delete the template. If you are sure of your selection, click **“Yes”**. If not, click **“No”**.

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 6 minutes
Remaining time is 29 minutes

Step 1 - IV | Step 2 - Attachments/Comments | Step 3 - Finish

IV Select

HMEDPHOT: [Dropdown]
ACTION: [Dropdown]
Template 1: [Dropdown] Clear
IV Request ID: IV000098

New Description: [Text Box]
Replace Description: [Text Box] Replace Entire Description [] Edit

Revenues

Non Inter Chart
 Inter Chart

Revenue Total Amount: 2.00

| CHART | FUND | ORGN | ACCT | PROG | DESCRIPTION | AMOUNT | D / C | |
|-------|--------|--------|--------|------|-------------|--------|-------|-------------|
| H | 191000 | 511541 | 530500 | SV | Test | 2.00 | C | Edit Delete |
| H | | | | | | | C | Add Clear |

Expenses

Expense Total Amount: 2.00

Delete

You are deleting this template.
Are you sure?

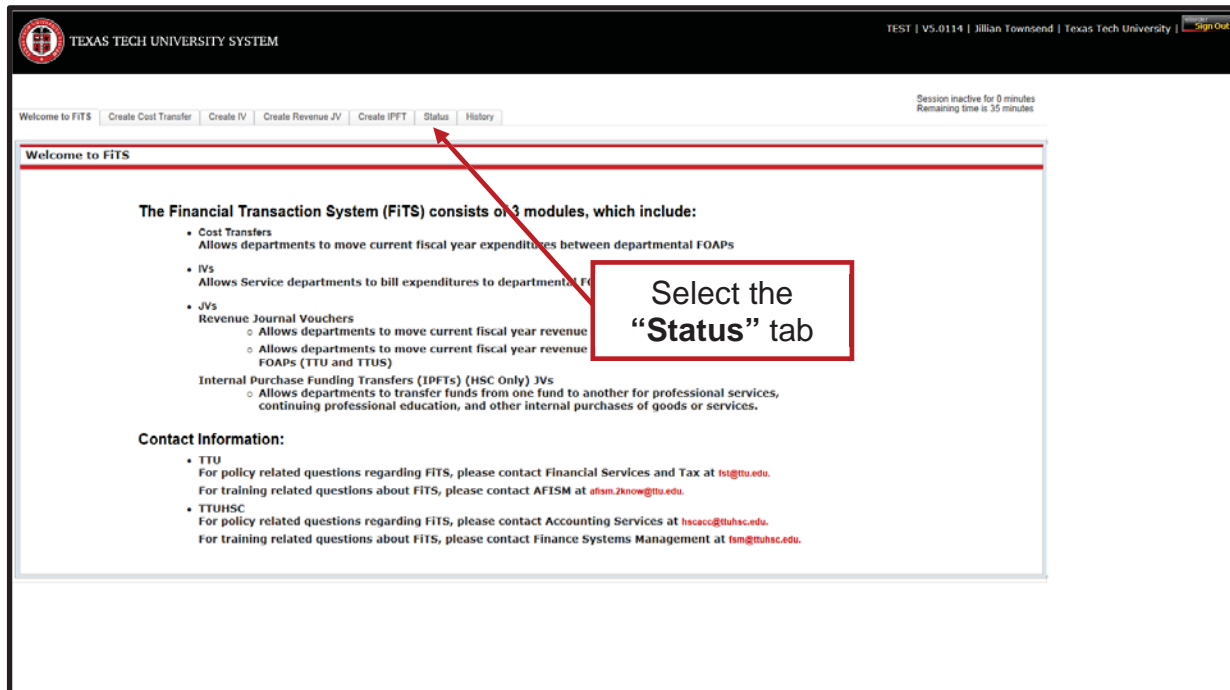
Yes No



Deleting an IV

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

In order to delete an IV, access FiTS and select the “**Status**” tab.



After selecting the “**Status**” tab, the screen will populate with all of the IVs that you originated that have not been submitted or processed.

Search for the IV(s) you wish to delete by Fund, Orgn, a date range that the IV 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 24 of this training document.

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



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 | OCT | 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 |
| IV000096 | Completed | Jillian Townsend | 02 / 24 / 2014 | Jillian Townsend | Edit Delete Submit |
| IV000097 | Started | Jillian Townsend | 02 / 24 / 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, a pop up message will appear to confirm, that you are sure you want to delete the IV. 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 | OCT | 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 |
| IV000096 | Completed | Jillian Townsend | 02 / 24 / 2014 | Jillian Townsend | Edit Delete Submit |
| IV000097 | Started | Jillian Townsend | 02 / 24 / 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 IV000097
Are you sure?

OK | Cancel

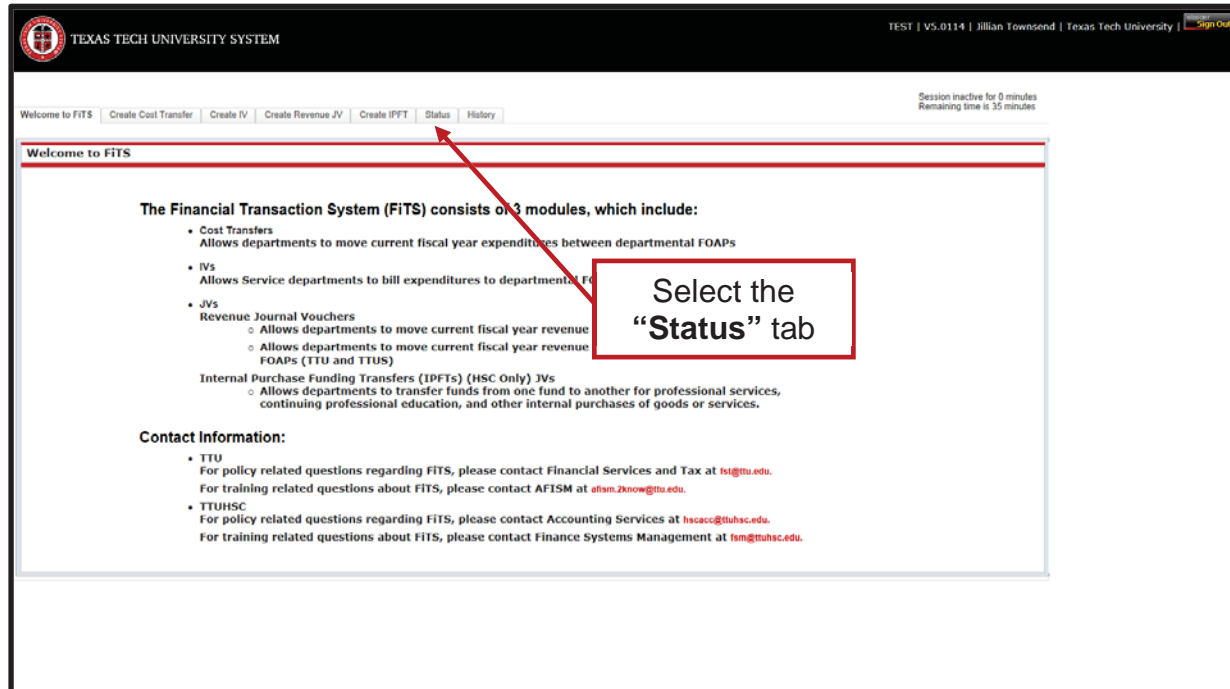
IVs that remain in the **“Status”** tab and have not been modified for 7 days will result in an email to the Originator informing them that the IV will be deleted the following Monday. To prevent the IV from being deleted, the Originator will need to make the necessary corrections before the following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



Searching the Status Tab

The “**Status**” tab can be used to search for any IV(s) that have not been completed or processed.

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



The “**Status**” tab automatically populates with all IVs for which you are the Originator.

Users can search for a specific IV 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 IVs 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.



The screenshot shows the FITS system search interface. Red callout boxes point to various search fields: "Search by Fund & Orgn" points to the Fund and Orgn dropdowns; "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; and "Search by Chart" points to the Chart dropdown menu.

| FITS ID asc | STATUS | ORIGINATOR | LAST MOD DATE | LAST MODIFIED BY | EDIT | DELETE | APPROVALS |
|-------------|---------|------------------|----------------|------------------|------|--------|-----------|
| CT000001 | | Jillian | 01 / 17 / 2014 | Jillian | | Delete | |
| CT000002 | | Jillian | 01 / 17 / 2014 | Jillian | | Delete | Approvals |
| CT000003 | | Jillian Townsend | 01 / 22 / 2014 | Jillian Townsend | Edit | Delete | Approvals |
| IV000001 | | Ricky Baker | 01 / 21 / 2014 | Ricky Baker | Edit | Delete | |
| IV000002 | | Carole Wardroup | 01 / 15 / 2014 | Carole Wardroup | Edit | Delete | |
| PT000021 | Started | Jillian Townsend | 01 / 27 / 2014 | Carole Wardroup | Edit | Delete | |
| 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 | |

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 click the **“Clear Search”** button to clear the search fields.

The screenshot shows the FITS system search interface. Red callout boxes point to the "Clear Search" button and the "Search" button.

| FITS ID asc | STATUS | ORIGINATOR | LAST MOD DATE | LAST MODIFIED BY | EDIT | DELETE | APPROVALS |
|-------------|-----------|------------------|----------------|------------------|------|--------|-----------|
| CT0001372 | Rejected | Jillian Townsend | 01 / 17 / 2014 | Jillian Townsend | Edit | Delete | |
| CT0001373 | Completed | Jillian Townsend | 01 / 17 / 2014 | Jillian Townsend | Edit | Delete | Approvals |
| CT0001374 | | Jillian Townsend | 01 / 17 / 2014 | Jillian Townsend | Edit | Delete | Approvals |
| CT0001375 | | Ricky Baker | 01 / 17 / 2014 | Ricky Baker | Edit | Delete | |
| CT0001376 | | Carole Wardroup | 01 / 17 / 2014 | Carole Wardroup | Edit | Delete | |
| CT0001377 | | Carole Wardroup | 01 / 17 / 2014 | Carole Wardroup | Edit | Delete | |
| CT0001378 | | Jillian Townsend | 01 / 17 / 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 | |



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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.

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: ALL CT IV RT PT

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 | Completed | Jillian Townsend | 01 / 22 / 2014 | Jillian Townsend | Edit | Delete Approvals |
| IV000069 | 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 |

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

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: ALL CT IV RT PT

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 | Completed | Jillian Townsend | 01 / 22 / 2014 | Jillian Townsend | Edit | Delete Approvals |
| 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 |
| 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 |

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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 screenshot shows the Texas Tech University System FiTS interface. At the top, there is a navigation bar with options like 'Welcome to FiTS', 'Create Cost Transfer', 'Create IV', 'Create Revenue JV', 'Create IPFT', 'Status', and 'History'. Below this is a search area with fields for 'Chart', 'Fund', 'Origin', and 'User', along with 'Date from' and 'Date to' filters. A red box highlights the 'FiTS ID Document Number' column in the search results table. The table has columns for 'FiTS ID asc', 'STATUS', 'ORIGINATOR', 'LAST MOD DATE', and 'LAST MODIFIED BY'. The data rows show various IVs with their respective statuses (Rejected, Completed, Started) and originators (Jillan Townsend, Ricky Baker, Carole Wardroup).

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

The search results will also show the following columns:

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

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

- **Started:** IV has been started by the Originator, but not marked complete. If you are the Originator for an IV, you will have the option to click the “**Edit**” button to make changes, or the “**Delete**” button to delete the IV from FiTS.
- **Completed:** IV has been marked complete, but not submitted for processing. If you are an Originator for an IV, you will have the option to click the “**Edit**”, “**Delete**”, or “**Submit**” buttons. Selecting the “**Submit**” button will send the IV for processing.
- **Errors:** IV has incurred an error while trying to post. Please contact Financial Systems Management at FSMElp@ttuhsc.edu for assistance.



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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: ALLO CT MV 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 | |
| IV000099 | 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 |
| PT000059 | 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 |

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

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: ALLO CT MV 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 | |
| IV000099 | 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 |
| PT000059 | 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 |

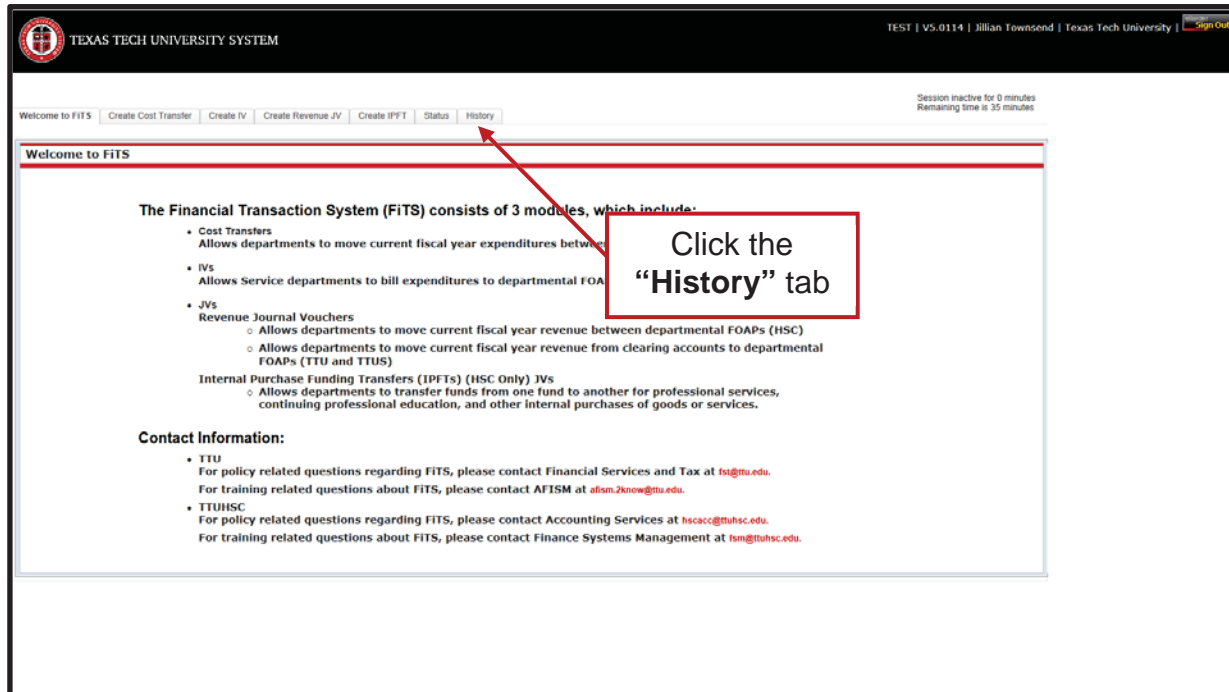
[1 - 10 / 11]



Searching the History Tab

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

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

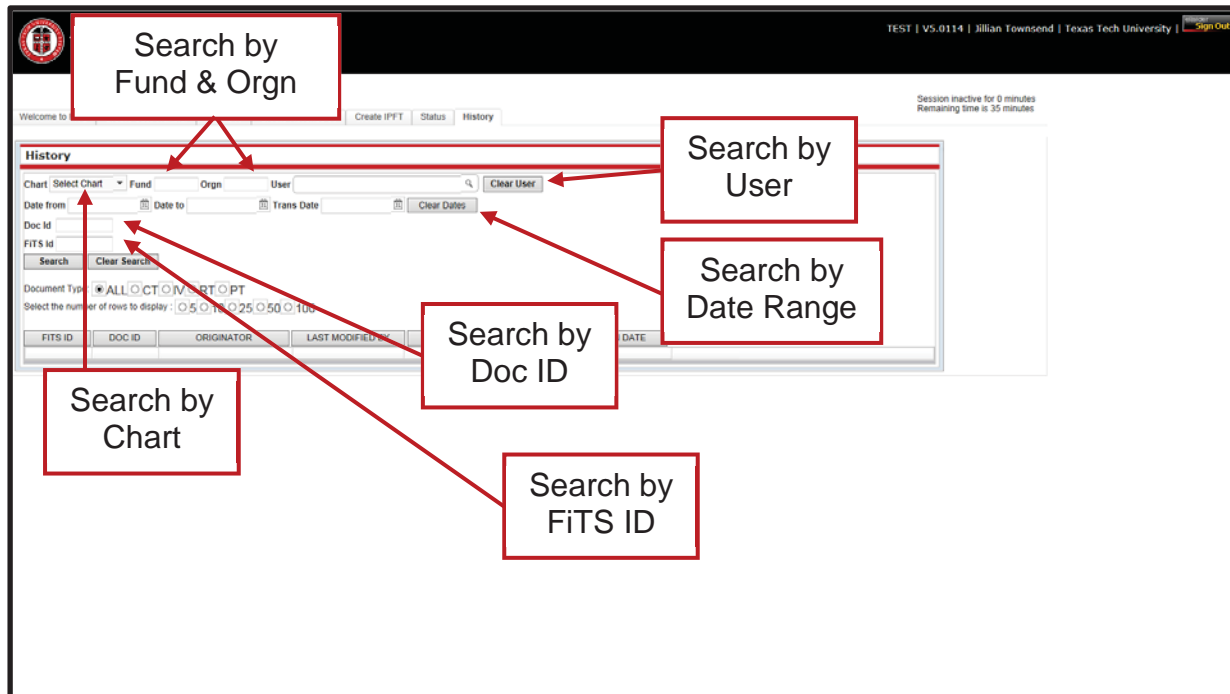


The “**History**” tab does not automatically populate with any IVs.

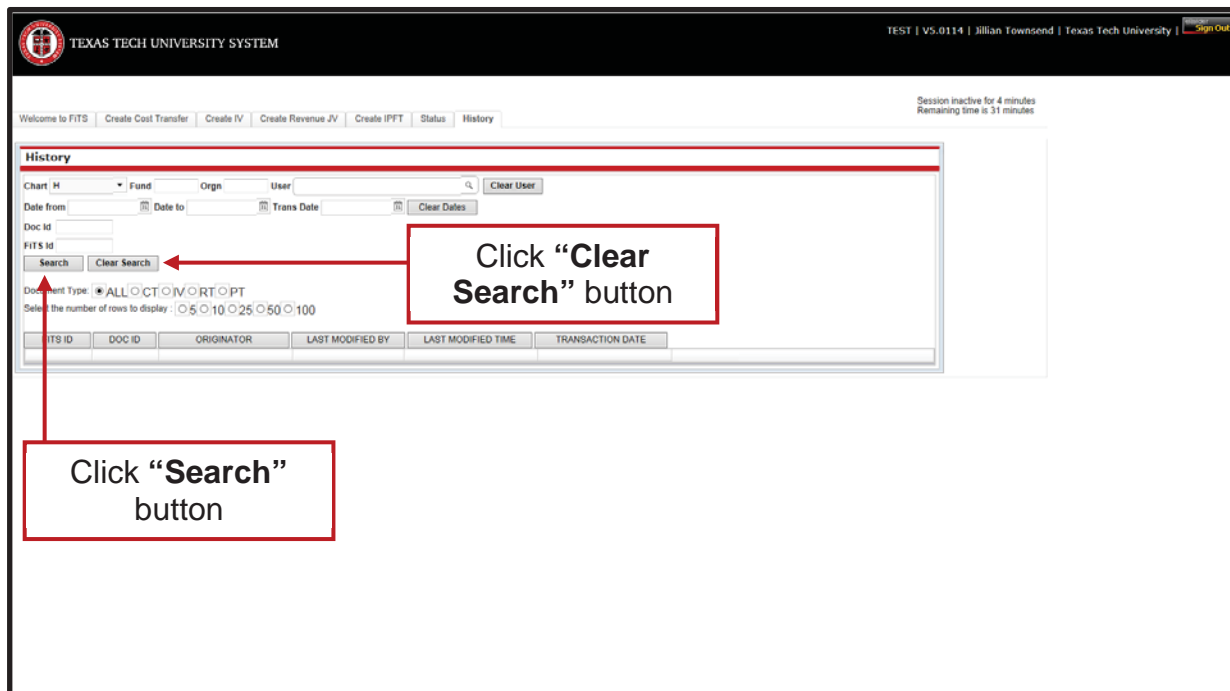
User can search for a specific IV the following ways:

- 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 IVs a user is involved in
- By Date Range: Returns results by date last modified
- By Transaction Date: Returns results for IVs posted by date entered
- By Doc ID: Enter all or a portion of the Banner Document ID that the IV 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, click 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.

History

Chart: M Fund: Orgn: User:

Date from: Date to: Trans Date:

Doc Id:

FITS Id:

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 MOD | |
|-------------|----------|---------------|------------------|----------------|-------------------------------------|
| CT000016 | CA000001 | Ida Butler | Lisa Castillo | 06 / 03 / 2013 | <input type="button" value="View"/> |
| CT000017 | CA000004 | Vicki Clayton | Michael Burns | 06 / 05 / 2013 | <input type="button" value="View"/> |
| CT000019 | CA000003 | Vicki Clayton | Vicki Clayton | 06 / 03 / 2013 | <input type="button" value="View"/> |
| CT000025 | CA000010 | Angela Taylor | Michael Burns | 06 / 11 / 2013 | <input type="button" value="View"/> |
| CT000026 | CA000001 | Ida Butler | Lisa Castillo | 06 / 03 / 2013 | <input type="button" value="View"/> |
| CT000034 | CA000001 | Ida Butler | Lisa Castillo | 06 / 03 / 2013 | <input type="button" value="View"/> |
| CT000039 | CA000009 | Angela Salmon | Angela Salmon | 06 / 10 / 2013 | <input type="button" value="View"/> |
| CT000040 | CA000006 | Erin Woods | Lisa Castillo | 06 / 10 / 2013 | <input type="button" value="View"/> |
| CT000046 | CA000010 | Yuren Diaz | Yuren Diaz | 06 / 11 / 2013 | <input type="button" value="View"/> |
| CT000047 | CA000008 | Erin Woods | Erin Woods | 06 / 11 / 2013 | <input type="button" value="View"/> |

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

History

Chart: M Fund: Orgn: User:

Date from: Date to: Trans Date:

Doc Id:

FITS Id:

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 | TIME | |
|-------------|----------|----------------|------------------|--------------------|----------------|-------------------------------------|
| RT000014 | C2000004 | Chance Riggins | Chance Riggins | 01 / 16 / 2014 | 01 / 17 / 2014 | <input type="button" value="View"/> |
| RT000015 | C2000001 | Shannon Martin | Shannon Martin | 01 / 16 / 2014 | 01 / 16 / 2014 | <input type="button" value="View"/> |
| RT000016 | C2000002 | Angela Taylor | Michael Burns | 01 / 16 / 2014 | 01 / 16 / 2014 | <input type="button" value="View"/> |
| RT000018 | C2000003 | Angela Taylor | Angela Taylor | 01 / 17 / 2014 | 01 / 17 / 2014 | <input type="button" value="View"/> |
| RT000019 | C2000005 | Michael Burns | Michael Burns | 01 / 17 / 2014 | 01 / 17 / 2014 | <input type="button" value="View"/> |
| RT000022 | C2000006 | Shannon Martin | Shannon Martin | 01 / 17 / 2014 | 01 / 17 / 2014 | <input type="button" value="View"/> |
| RT000027 | C2000008 | Michael Burns | Michael Burns | 01 / 22 / 2014 | 01 / 22 / 2014 | <input type="button" value="View"/> |
| RT000031 | C2000011 | Shannon Martin | Shannon Martin | 01 / 22 / 2014 | 01 / 22 / 2014 | <input type="button" value="View"/> |
| RT000032 | C2000010 | Shannon Martin | Shannon Martin | 01 / 22 / 2014 | 01 / 22 / 2014 | <input type="button" value="View"/> |
| RT000035 | C2000022 | Angela Taylor | Shannon Martin | 01 / 23 / 2014 | 01 / 23 / 2014 | <input type="button" value="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 IV
- The User who last modified the IV
- The Date of the last modification to the IV
- The Date the IV was processed and posted

To view the detail of the processed IV, click the “View” button.

The screenshot shows the 'History' section of the FiTS system. It includes a search bar with fields for Chart, Fund, Orgn, and User, and a table of IV records. The table has columns for FiTS ID, DOC ID, ORIGINATOR, LAST MODIFIED BY, LAST MODIFIED TIME, and TRANSACTION DATE. A 'View' button is present for each row. Red callout boxes 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 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 | View |
|-------------|----------|----------------|------------------|--------------------|------------------|------|
| RT000014 | C2000001 | Chance Riggins | Chance Riggins | 01 / 16 / 2014 | 01 / 17 / 2014 | View |
| RT000015 | C2000001 | Shannon Martin | Shannon Martin | 01 / 16 / 2014 | 01 / 16 / 2014 | View |
| RT000016 | C2000002 | Angela Taylor | Michael Burns | 01 / 16 / 2014 | 01 / 16 / 2014 | View |
| RT000018 | C2000002 | Angela Taylor | Angela Taylor | 01 / 17 / 2014 | 01 / 17 / 2014 | View |
| RT000019 | C2000005 | Michael Burns | Michael Burns | 01 / 17 / 2014 | 01 / 17 / 2014 | View |
| RT000022 | C2000006 | Shannon Martin | Shannon Martin | 01 / 17 / 2014 | 01 / 17 / 2014 | View |
| RT000027 | C2000008 | Michael Burns | Michael Burns | 01 / 22 / 2014 | 01 / 22 / 2014 | View |
| RT000031 | C2000011 | Shannon Martin | Shannon Martin | 01 / 22 / 2014 | 01 / 22 / 2014 | View |
| RT000032 | C2000010 | Shannon Martin | Shannon Martin | 01 / 22 / 2014 | 01 / 22 / 2014 | View |

If you have a policy question regarding the IV 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.