



Internal Transaction Requests

Version Date: May 16, 2024

Training Guide
Internal Transaction Requests

Table of Contents

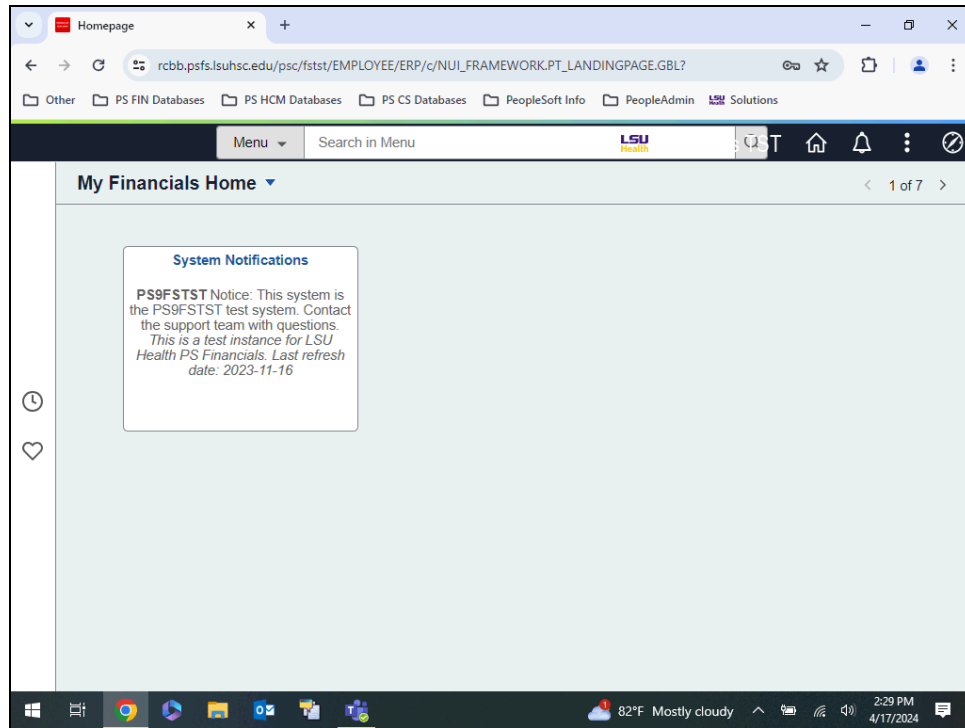
Internal Transaction Requests..... 1
 Add Internal Tr eForm..... 1

Internal Transaction Requests

Add Internal Tr eForm

Procedure

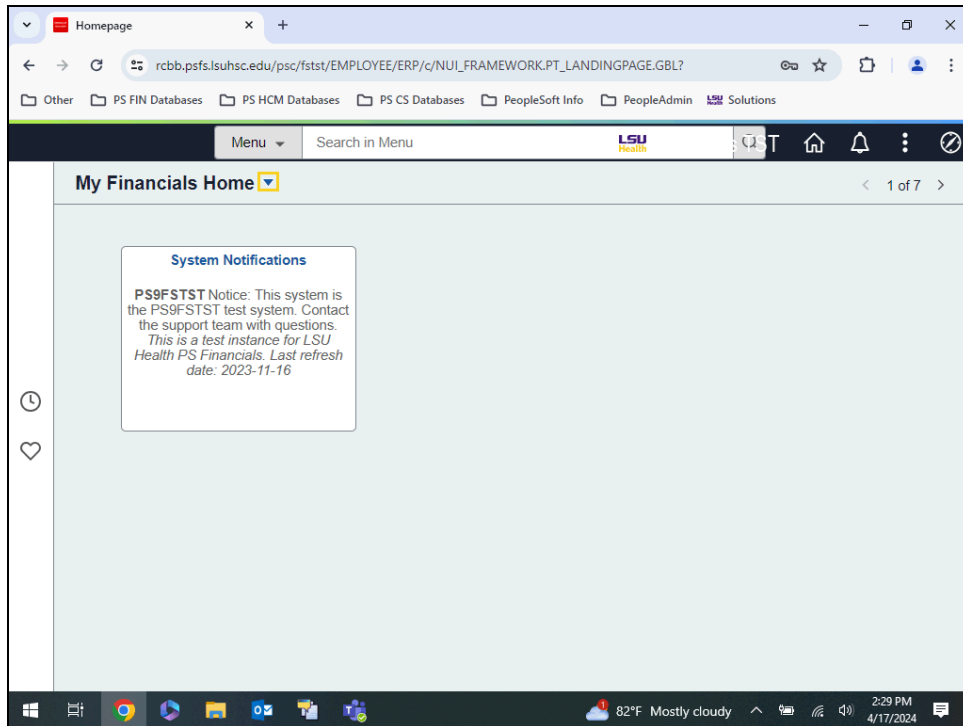
In this topic you will learn how to **Add an Internal Tr eForm**.




Step	Action
1.	<p>Internal Transactions eForms</p> <p>Users will complete Internal Transaction eForms for two purposes:</p> <ol style="list-style-type: none">1. ITs are used to charge an internal department for services/products provided by a cost center; and/or2. ITs are used to transfer costs from one department to another. Examples for this include mail, supplies, etc.

Training Guide

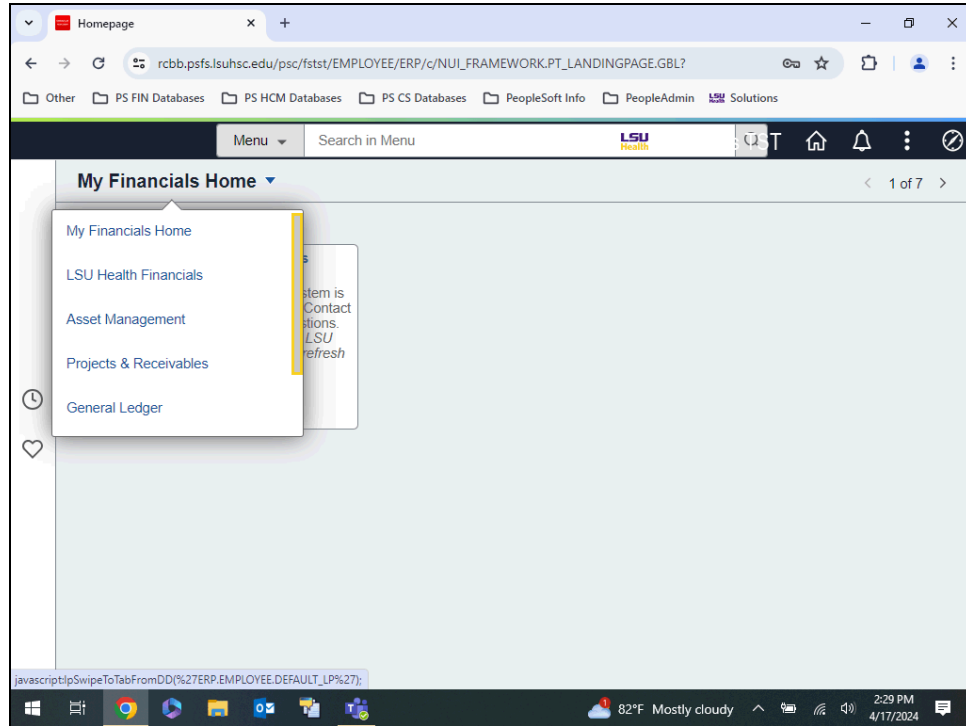
Internal Transaction Requests



Step	Action
2.	<p>A separate homepage contains GT eForms, which includes the Add an Internal Tr eForm option.</p> <p>Click the button to the right of the My Financials Home field.</p> 

Training Guide

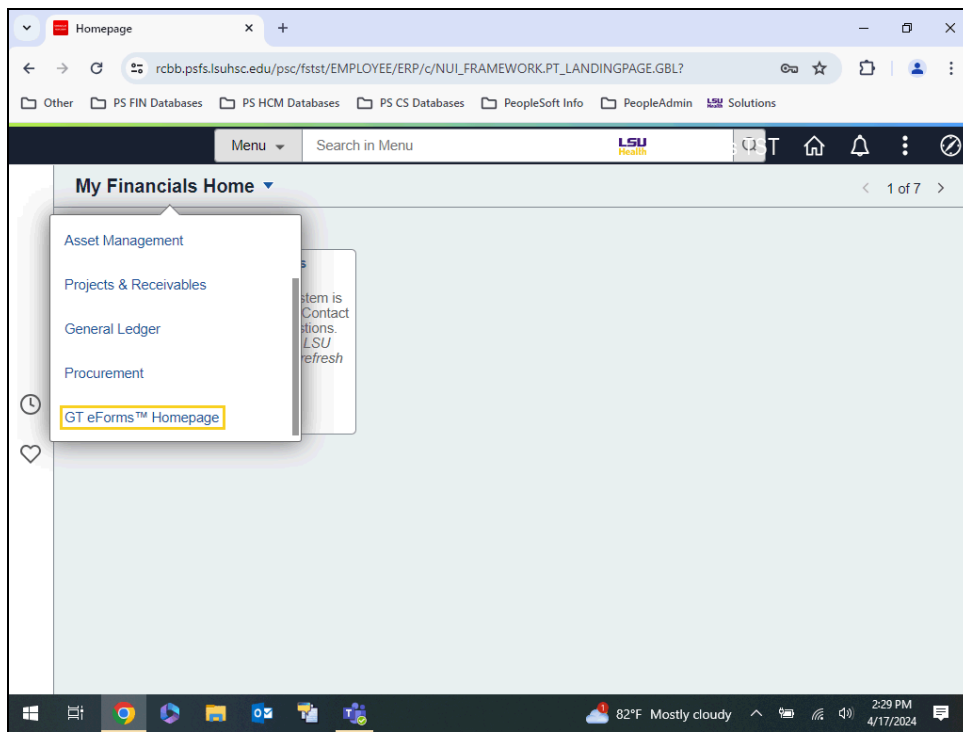
Internal Transaction Requests



Step	Action
3.	Click the Down button of the scrollbar.

Training Guide

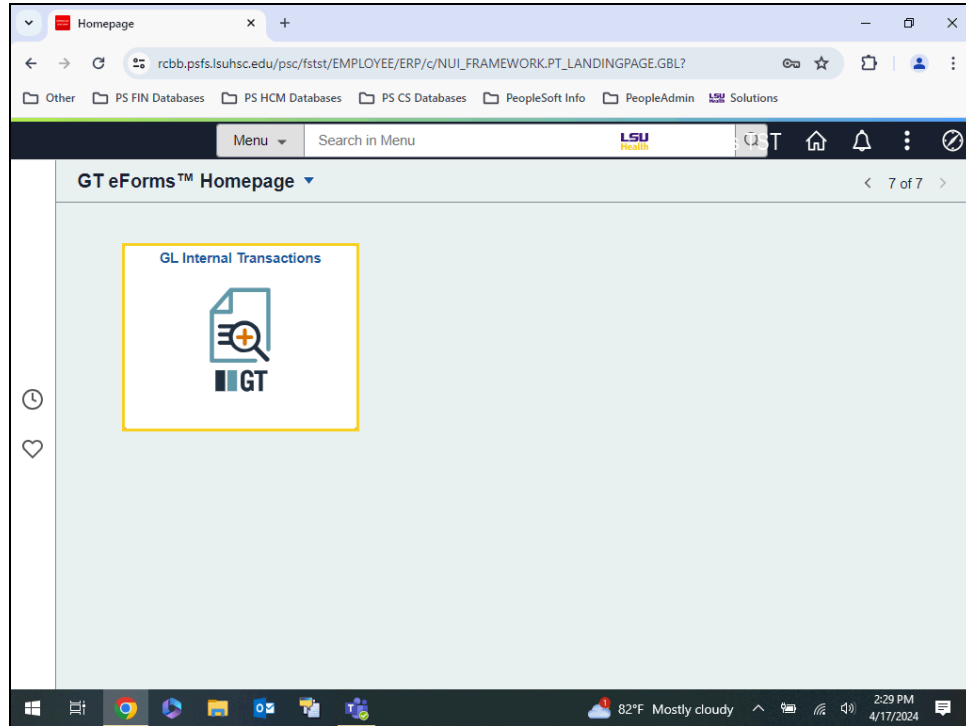
Internal Transaction Requests



Step	Action
4.	Click the GT eForms Homepage list item. GT eForms™ Homepage

Training Guide

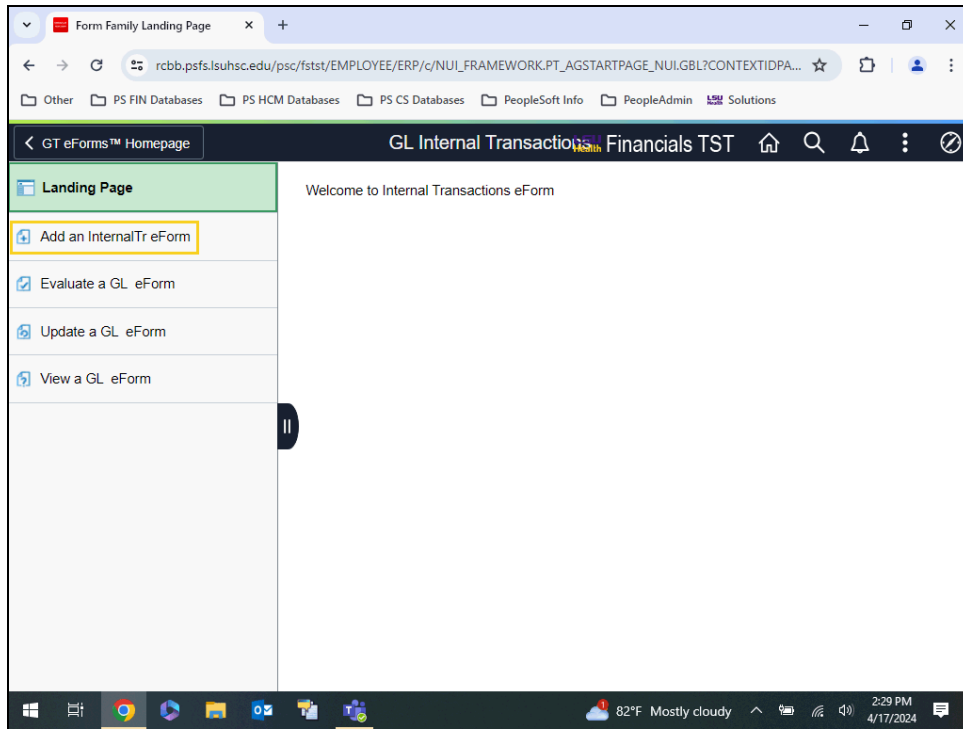
Internal Transaction Requests




Step	Action
5.	Click the GL Internal Transactions button.

Training Guide

Internal Transaction Requests



Step	Action
6.	Click in the Add an Internal Tr eForm field. 

Training Guide Internal Transaction Requests

Add Internal Transaction : Internal Transaction Form ID 10422

Form initiator must complete all required fields marked with an "*" but can complete any other available fields before submitting for processing. By submitting the form, The From Department is certifying the information is accurate and is approving the transaction on behalf of the department providing the requested services/products. The To Department (receiver of services/products) will review the Credit Section to confirm charges are accurate and complete the required chartfields in the Debit Section upon receive of email notification. The To Department will Resubmit (only if changes are made to the form) or Approve for final review by Accounting Services."

INTERNAL TRANSACTION - SERVICE OR PRODUCT REQUESTED

*Quantity	Description	*Unit Cost	Amount	Insert A Row	Delete A Row
1		0.00	0.00	+	-

Total Amount

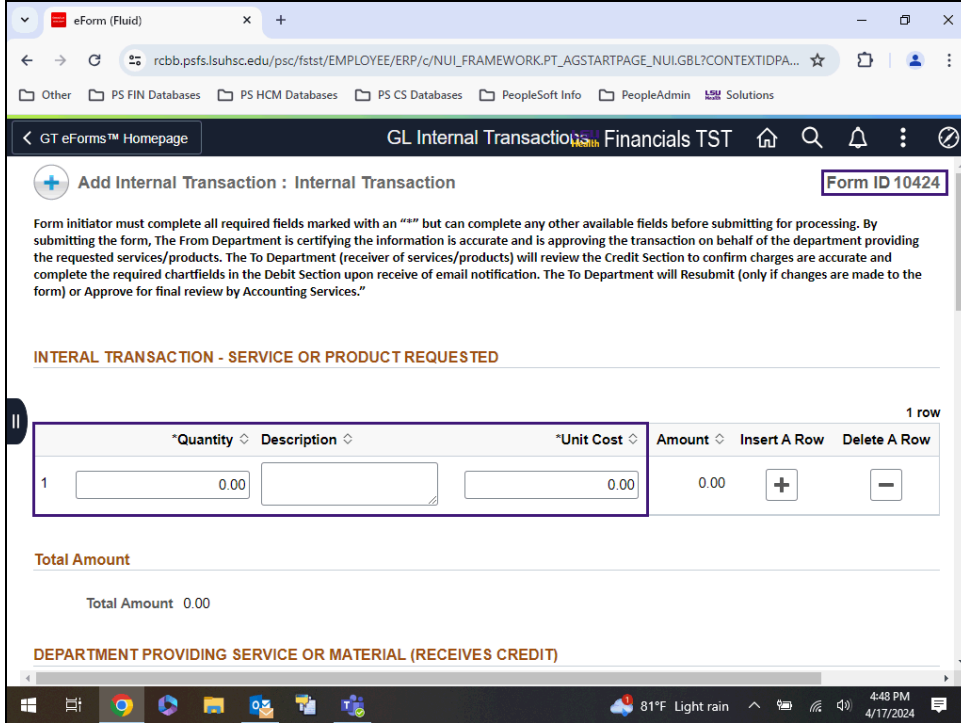
Total Amount 0.00

DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)

Step	Action
7.	<p>Add Internal Transaction : Internal Transaction Form</p> <p>The Internal Transaction eForm is divided into three (3) sections:</p> <ol style="list-style-type: none"> 1. Service and Product Requested 2. Department Providing Service or Material (Receives Credit) 3. Department Needing Service or Product (Receives Expense-Debit)

Training Guide

Internal Transaction Requests



Step	Action
8.	<p>Service or Product Requested</p> <p>This section details the <i>quantity</i>, the <i>description</i>, and the <i>cost per item</i> of the product or service.</p> <p>NOTE: The Form ID at the top right of the page is the Internal Transaction Form ID assigned by the system.</p>

Training Guide

Internal Transaction Requests

DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)

*Business Unit: LSUNO *Date: 04/17/2024

*From DEPTID: From Department

*Requested by: Requested by:

Invoice: Invoice:

I confirm services/products have been rendered satisfactorily. I further certify that the information is accurate and approve this Internal Transaction for further processing

No

Credit

*SpeedType Key	*Account	Fund Code	Department	Program Code	Class Field	Project	*Amount	Com
1							0.00	

DEPARTMENT NEEDING SERVICE OR PRODUCT (RECEIVES EXPENSE – DEBIT)

*To DEPTID: To Department

Step	Action
9.	<p>Department Providing Service or Material (Receives Credit)</p> <p>The section is completed by the Initiator of the form. It details the <i>department ID</i>, the <i>departmental invoice number</i>, a <i>certification slide box</i>, the <i>SpeedType</i> and <i>Account</i> to charge the expense, the <i>amount</i>, and <i>additional comments</i>.</p>

Training Guide

Internal Transaction Requests

The screenshot shows a web browser window with the URL `rcbb.pfs.isuhsc.edu/psc/ftst/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPA...`. The page title is "GL Internal Transactions Financials TST". The form contains several input fields and sections:

- Top section: *SpeedType Key, *Account, and *Amount fields.
- Section: **DEPARTMENT NEEDING SERVICE OR PRODUCT (RECEIVES EXPENSE - DEBIT)** with a *To DEPTID field.
- Section: **Debit** with a table for recording transactions.
- Table columns: SpeedType Key, Account, Fund Code, Department, Program Code, Class Field, Project, *Amount, and Comments.
- Section: **File Attachments**.

Step	Action
10.	<p><i>Department Needing Service or Product (Receives Expense - Debit)</i></p> <p>This section requires the <i>Initiator</i> to complete the *To DEPTID and the Debit Account field. The remaining fields will be completed by the department receiving the product or service, and includes the SpeedType and account to charge the expense, the amount, and additional comments.</p>

Training Guide

Internal Transaction Requests

Add Internal Transaction : Internal Transaction Form ID 10422

Form initiator must complete all required fields marked with an "*" but can complete any other available fields before submitting for processing. By submitting the form, The From Department is certifying the information is accurate and is approving the transaction on behalf of the department providing the requested services/products. The To Department (receiver of services/products) will review the Credit Section to confirm charges are accurate and complete the required chartfields in the Debit Section upon receive of email notification. The To Department will Resubmit (only if changes are made to the form) or Approve for final review by Accounting Services."

INTERNAL TRANSACTION - SERVICE OR PRODUCT REQUESTED

*Quantity	Description	*Unit Cost	Amount	Insert A Row	Delete A Row
1		0.00	0.00	+	-

Total Amount

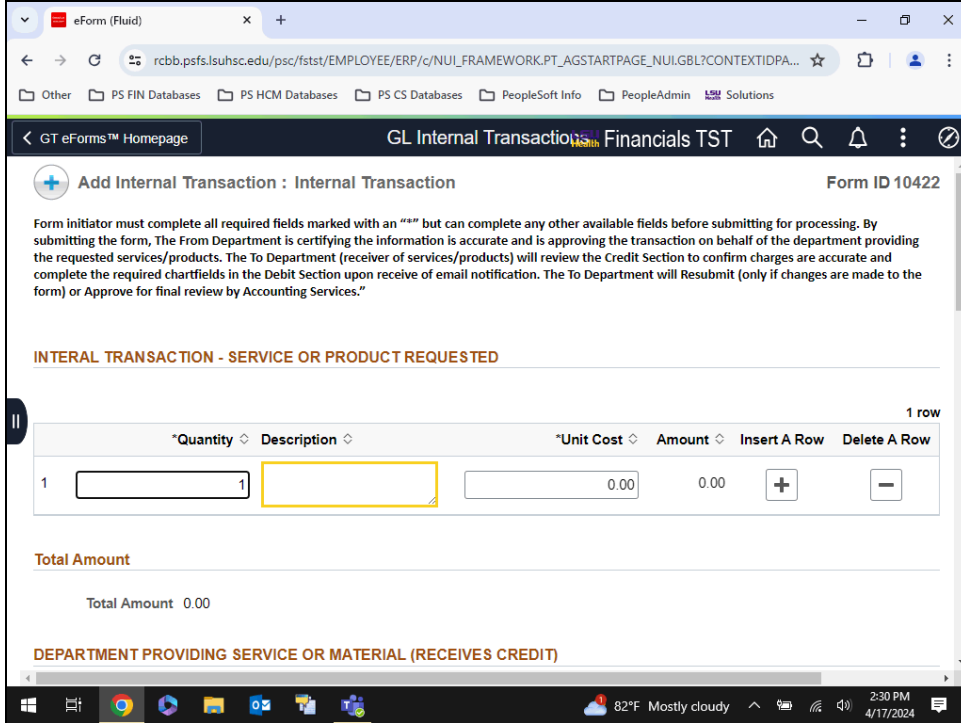
Total Amount 0.00

DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)

Step	Action
11.	<p>Service or Product Requested</p> <p><i>NOTE: The Initiator of the IT Form is required to complete every field marked with an "*".</i></p> <p>Enter the desired information into the field. Enter "1".</p>

Training Guide

Internal Transaction Requests



Step	Action
12.	<p>A user can enter up to 30 characters in the Description field. This field will be the general ledger journal description for reporting.</p> <p>Enter the desired information into the field. Enter "copy paper".</p>

Training Guide

Internal Transaction Requests

Add Internal Transaction : Internal Transaction Form ID 10422

Form initiator must complete all required fields marked with an "*" but can complete any other available fields before submitting for processing. By submitting the form, The From Department is certifying the information is accurate and is approving the transaction on behalf of the department providing the requested services/products. The To Department (receiver of services/products) will review the Credit Section to confirm charges are accurate and complete the required chartfields in the Debit Section upon receive of email notification. The To Department will Resubmit (only if changes are made to the form) or Approve for final review by Accounting Services."

INTERNAL TRANSACTION - SERVICE OR PRODUCT REQUESTED

*Quantity	Description	*Unit Cost	Amount	Insert A Row	Delete A Row
1	copy paper	0.00	0.00	+	-

Total Amount

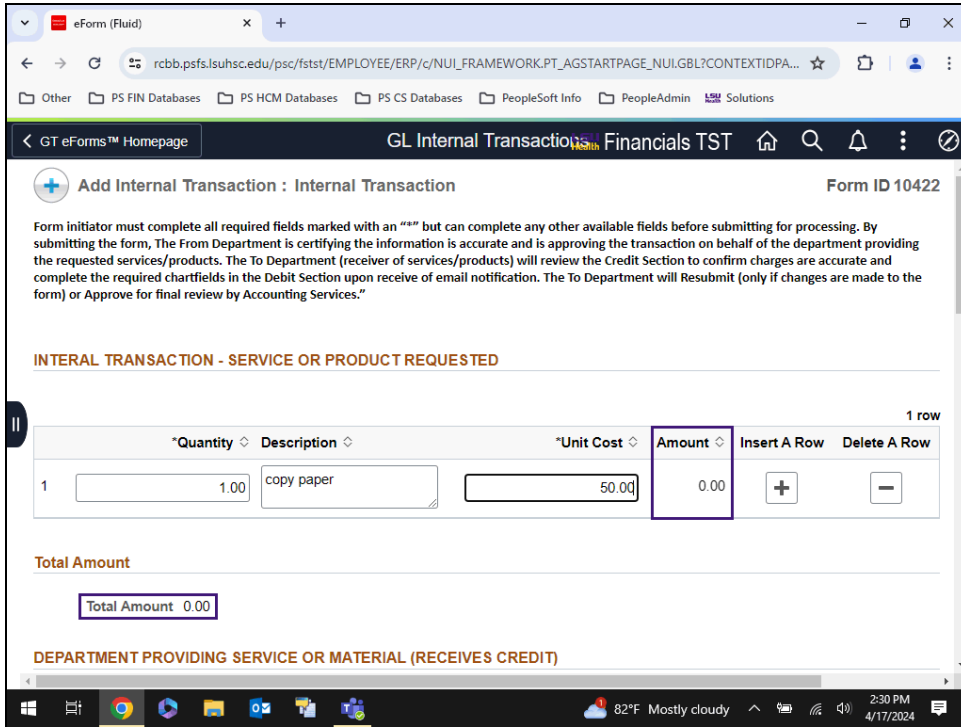
Total Amount 0.00

DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)

Step	Action
13.	Enter the desired information into the field. Enter " 50.00 ".

Training Guide

Internal Transaction Requests



Step	Action
14.	When the <i>*Unit Cost</i> is entered, the Amount and Total Amount will automatically calculate after pressing the Tab key. Press [Tab] .

Training Guide

Internal Transaction Requests

Add Internal Transaction : Internal Transaction Form ID 10422

Form initiator must complete all required fields marked with an "*" but can complete any other available fields before submitting for processing. By submitting the form, The From Department is certifying the information is accurate and is approving the transaction on behalf of the department providing the requested services/products. The To Department (receiver of services/products) will review the Credit Section to confirm charges are accurate and complete the required chartfields in the Debit Section upon receive of email notification. The To Department will Resubmit (only if changes are made to the form) or Approve for final review by Accounting Services."

INTERNAL TRANSACTION - SERVICE OR PRODUCT REQUESTED

*Quantity	Description	*Unit Cost	Amount	Insert A Row	Delete A Row
1	copy paper	50.00	50.00	+	-

Total Amount

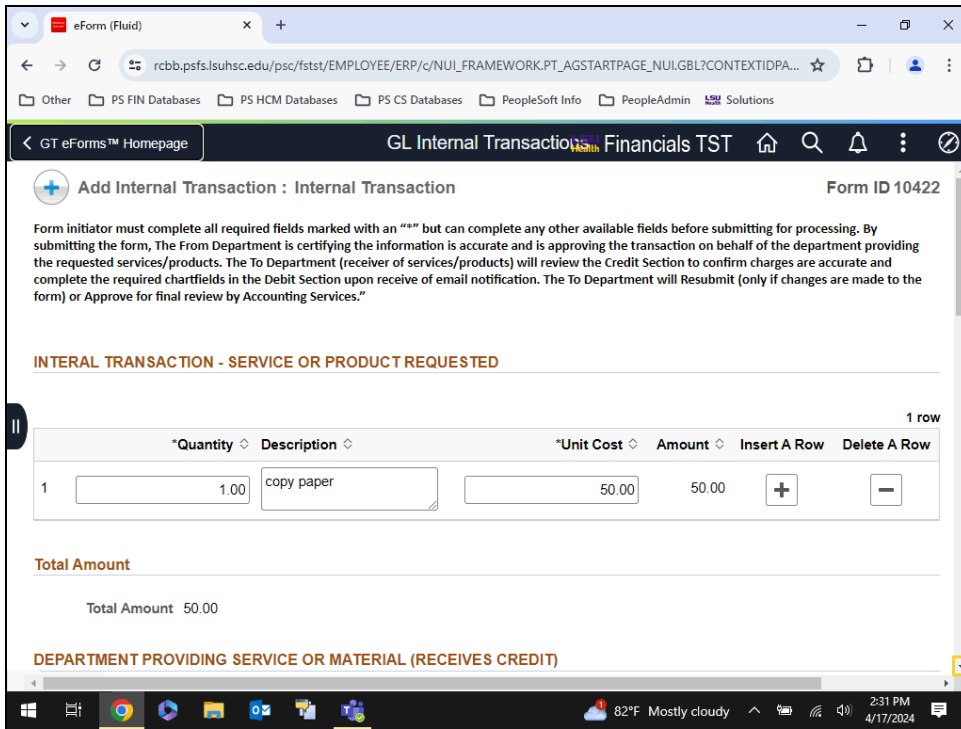
Total Amount 50.00


DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)

Step	Action
15.	If more rows are needed, select the "+" to add a row. The "-" will delete a row.

Training Guide

Internal Transaction Requests



Step	Action
16.	Click the Down button of the scrollbar. 

Training Guide

Internal Transaction Requests

The screenshot shows a web browser window with the URL `rcbb.pfs.lsuhs.edu/psc/fstst/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPA...`. The page title is "GL Internal Transaction Requests Financials TST". The main heading is "DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)".

Fields on the form include:

- *Business Unit: LSUNO
- *Date: 04/17/2024
- *From DEPTID
- *Requested by: K
- Invoice

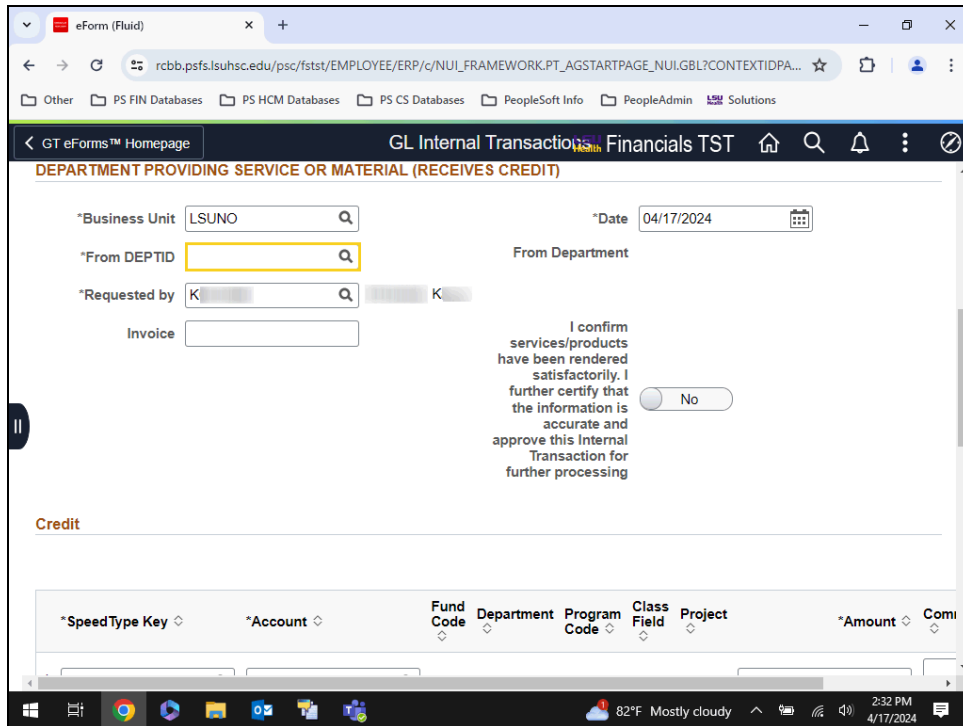
A confirmation statement is present: "I confirm services/products have been rendered satisfactorily. I further certify that the information is accurate and approve this Internal Transaction for further processing." A "No" button is visible next to the statement.

Below the form is a table header with the following columns: *SpeedType Key, *Account, Fund Code, Department, Program Code, Class Field, Project, *Amount, and Com.

Step	Action
17.	<p>Department Providing Service or Material (Receives Credit)</p> <p>Confirm the *Business Unit is LSUNO.</p> <p>The *Date defaults to the current date, and can be changed if needed.</p> <p>The *Requested by field will default with the current user's ID and name.</p>

Training Guide

Internal Transaction Requests



Step	Action
18.	<p>The *From DEPTID is the department that will receive the credit for products or services rendered.</p> <p>Enter the desired information into the *From DEPTID field. Enter "1651000".</p>

Training Guide

Internal Transaction Requests

The screenshot shows a web browser window with the URL `rcbb.pfsf.edu/psc/fstst/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPA...`. The page title is "GL Internal Transaction Requests Financials TST". The main heading is "DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)".

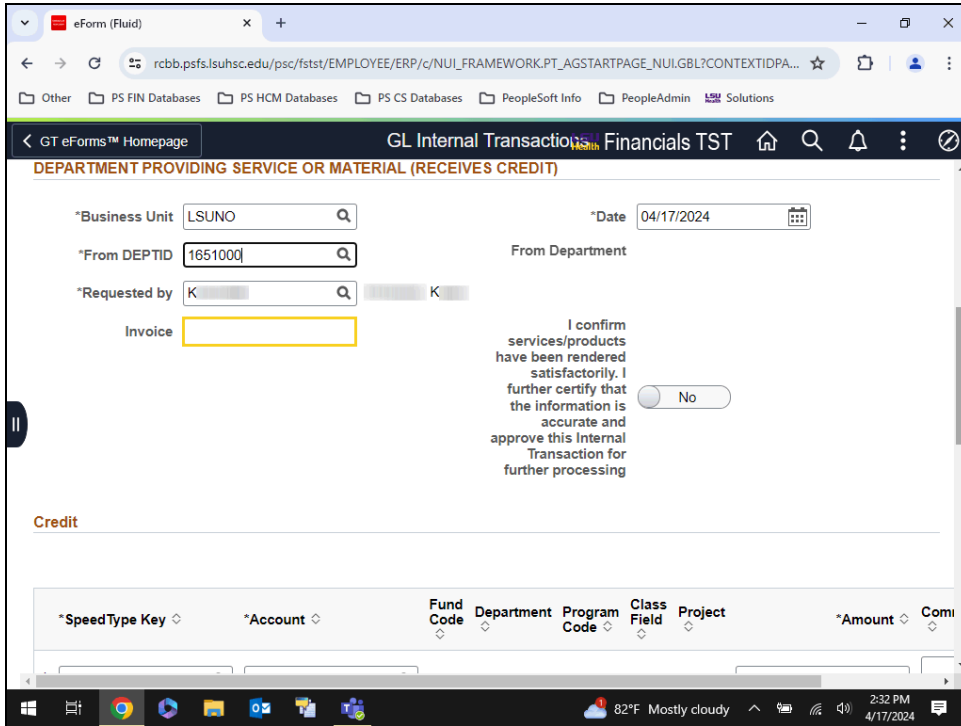
Fields visible on the form include:

- *Business Unit: LSUNO
- *Date: 04/17/2024
- *From DEPTID: 1651000
- *Requested by: K
- Invoice: (empty field)
- From Department: (empty field)
- A confirmation section with the text: "I confirm services/products have been rendered satisfactorily. I further certify that the information is accurate and approve this Internal Transaction for further processing." with a "No" button.
- A table header for "Credit" with columns: *SpeedType Key, *Account, Fund Code, Department, Program Code, Class Field, Project, *Amount, and Com.

Step	Action
19.	<p>The Invoice number is the department invoice number. It can be up to 30 characters long. The Invoice number will be the general ledger journal description.</p> <p><i>NOTE: General Accounting's recommended practice is to begin with the department's Invoice number and then add any additional language needed to be seen in the general ledger. Examples would include IRB Fee, Morphology Core, CME, Mailroom, etc</i></p>


Training Guide

Internal Transaction Requests



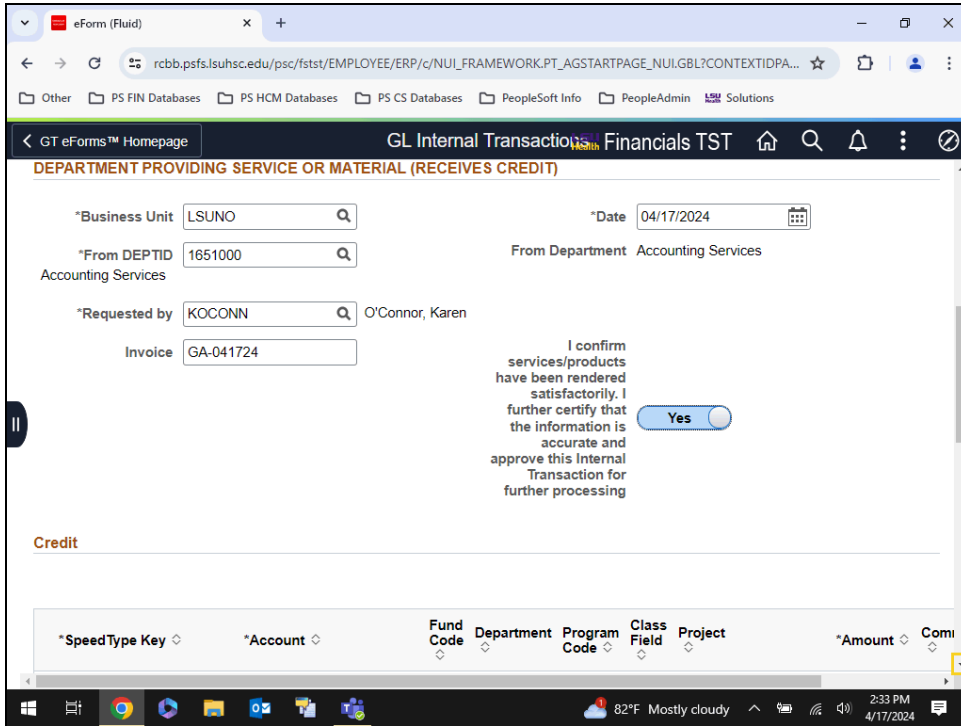
Step	Action
20.	<p>The Invoice number is the department invoice number. It can be up to 30 characters long.</p> <p>Enter the desired information into the Invoice field. Enter "GA-041724".</p>


Training Guide Internal Transaction Requests

Step	Action
21.	<p>The certification statement requires confirmation. Read the statement. To confirm, click on the button to change the response to "Yes."</p> <p>NOTE: Users may only submit the IT after the user slides the confirm button in the top of the form from "No" to "Yes". Click in the field.</p> 

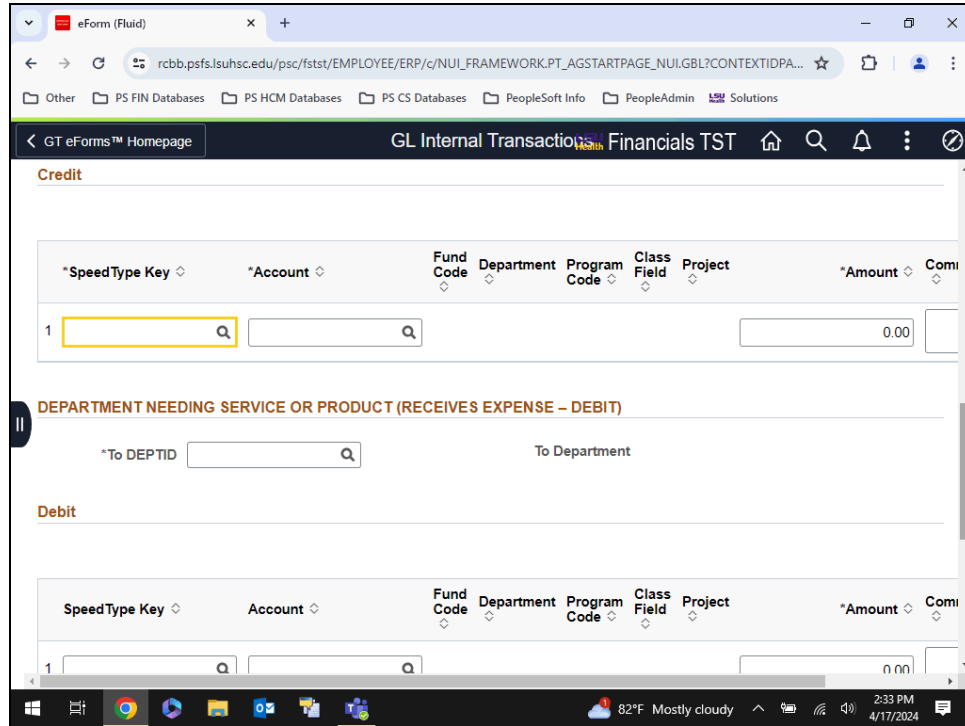
Training Guide

Internal Transaction Requests



Step	Action
22.	Click the Down button of the scrollbar. 

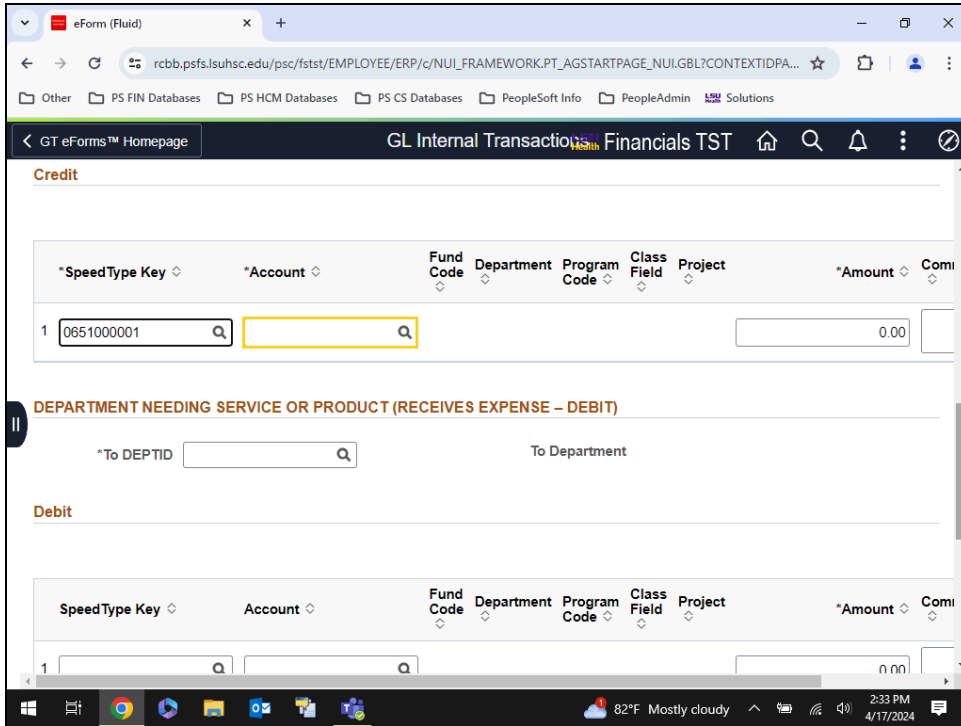
Training Guide Internal Transaction Requests



Step	Action
23.	Enter the SpeedType and Account for the <i>department receiving</i> the credit. Enter the desired information into the field. Enter " 0651000001 ".

Training Guide

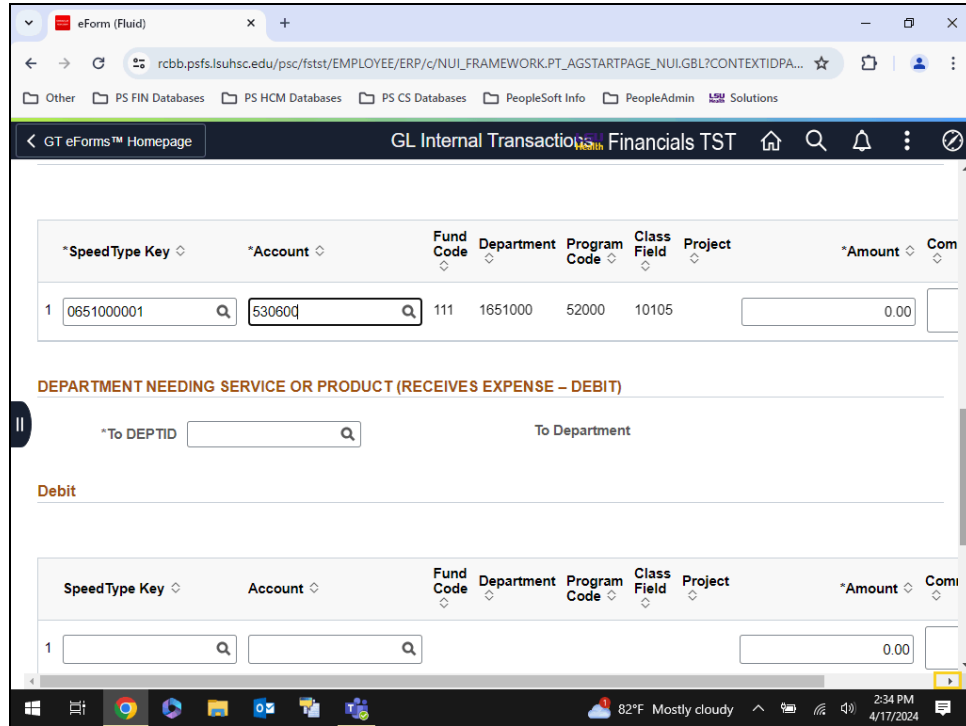
Internal Transaction Requests




Step	Action
24.	<p>General Accounting NOTE: In most cases, the account number will be 530600. Consult General Accounting if you have any questions.</p> <p>Enter the desired information into the field. Enter "530600".</p>

Training Guide

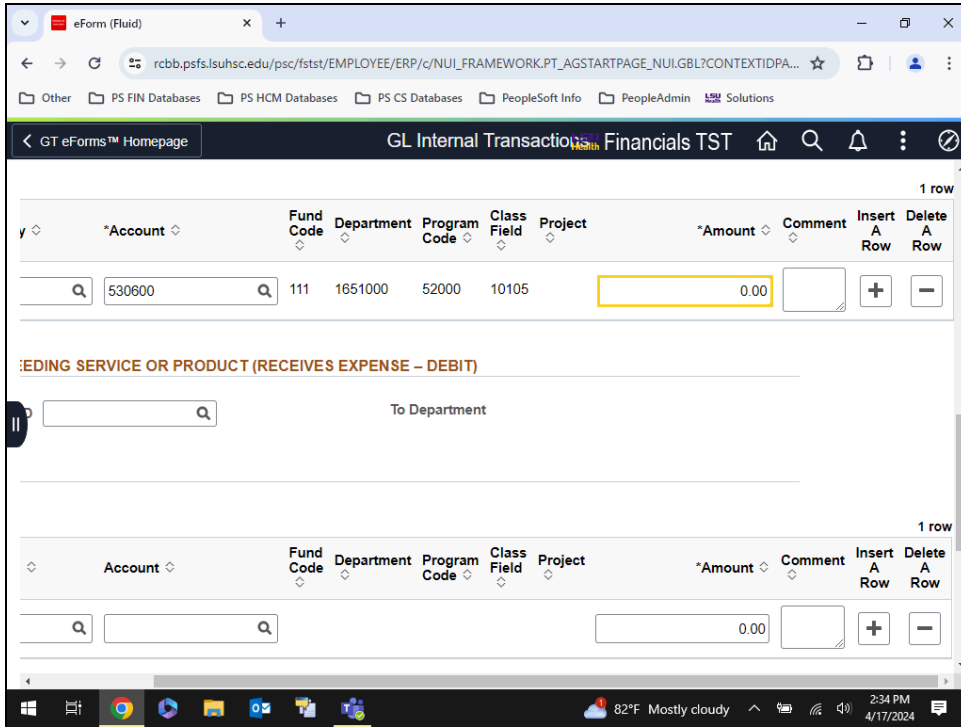
Internal Transaction Requests



Step	Action
25.	Click the Right button of the scrollbar. 

Training Guide

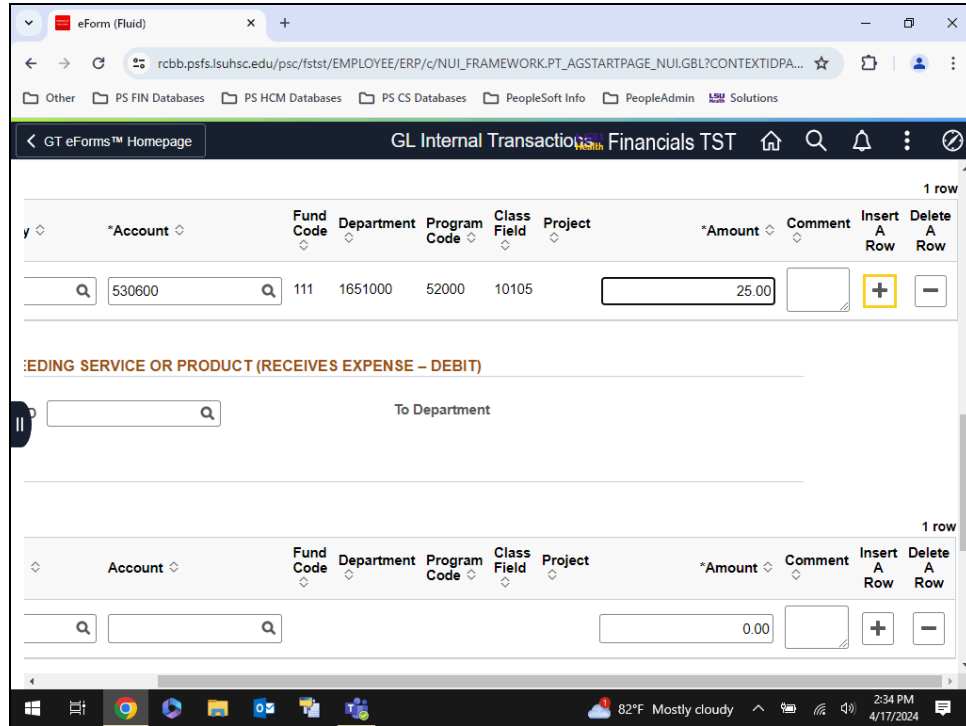
Internal Transaction Requests




Step	Action
26.	<p>Enter the total amount from the Service or Product Request area if using a single SpeedType Key. For this example, two SpeedType Keys will be used, so an additional line will be inserted. The second SpeedType Key, account and the remaining amount will be entered on Line 2.</p> <p><i>Comments</i> are <u>not</u> required.</p> <p>Enter the desired information into the Amount field. Enter "25.00".</p>

Training Guide

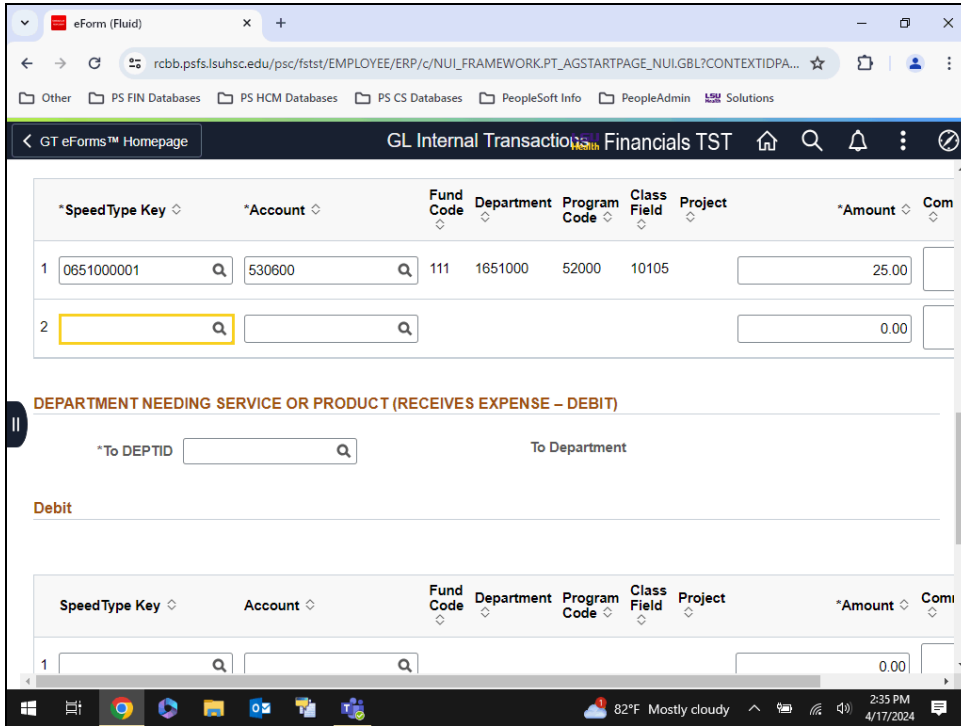
Internal Transaction Requests



Step	Action
27.	Click the Add a New Row button. 

Training Guide

Internal Transaction Requests



Step	Action
28.	Enter the desired information into the Line 2 SpeedType Key field. Enter "19800007A" .

Training Guide

Internal Transaction Requests

Step	Action
29.	Enter the desired information into the Account field. Enter " 530600 ".

Training Guide

Internal Transaction Requests

	*SpeedType Key	*Account	Fund Code	Department	Program Code	Class Field	Project	*Amount
1	0651000001	530600	111	1651000	52000	10105		25.00
2	198000007A	530600	113	1980003	00000	35100	198000007A	0.00

DEPARTMENT NEEDING SERVICE OR PRODUCT (RECEIVES EXPENSE - DEBIT)

*To DEPTID To Department

Debit

	SpeedType Key	Account	Fund Code	Department	Program Code	Class Field	Project	*Amount	Com
1	<input type="text"/>	<input type="text"/>						0.00	<input type="text"/>

Step	Action
30.	<p>Enter the desired information into the Amount field. Enter "25.00".</p> <p><i>NOTE: The Amount for Line 1 and Line 2, when added together, should equal the Total Amount from the Service or Product Request area.</i></p>

Training Guide Internal Transaction Requests

The screenshot displays the 'GL Internal Transaction Financials TST' application. It features a table with the following data:

*Speed Type Key	*Account	Code	Department	Program Code	Field	Project	*Amount
1	0651000001	530600	111	1651000	52000	10105	25.00
2	198000007A	530600	113	1980003	00000	35100 198000007A	25.00

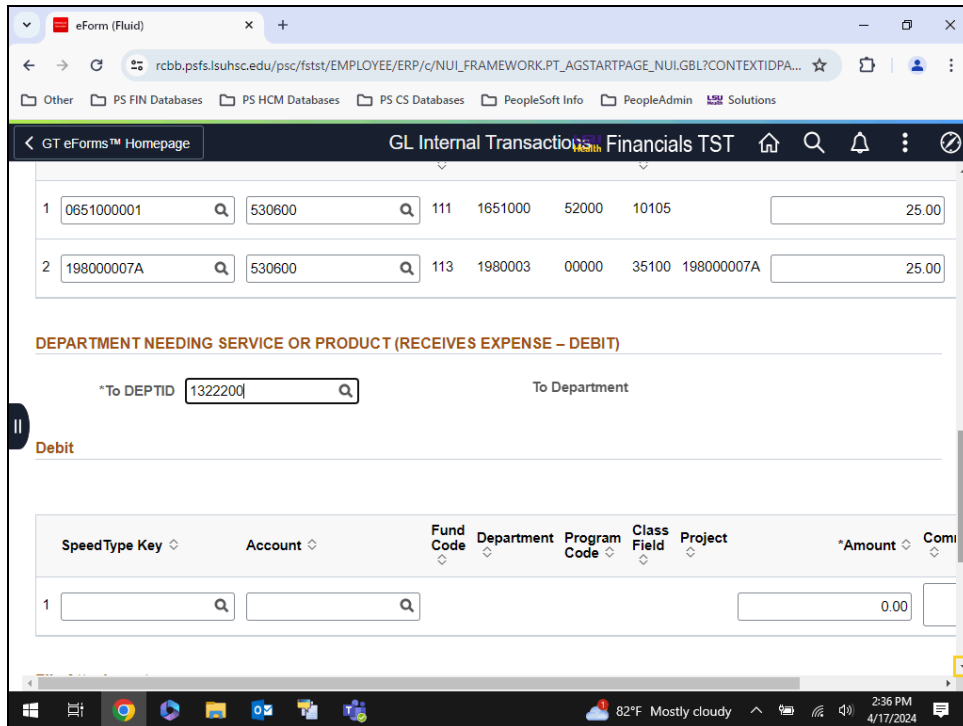
Below the table, the section 'DEPARTMENT NEEDING SERVICE OR PRODUCT (RECEIVES EXPENSE - DEBIT)' contains a 'To DEPTID' field, which is highlighted in yellow. Below this is a 'Debit' section. At the bottom of the application, there is another table with the following data:


Speed Type Key	Account	Fund Code	Department	Program Code	Class Field	Project	*Amount	Com
1							0.00	

Step	Action
31.	<p>The DeptID for the department receiving the product or service will be entered in the *To DEPTID.</p> <p>Enter the desired information into the *To DEPTID field. Enter "1322200".</p>

Training Guide

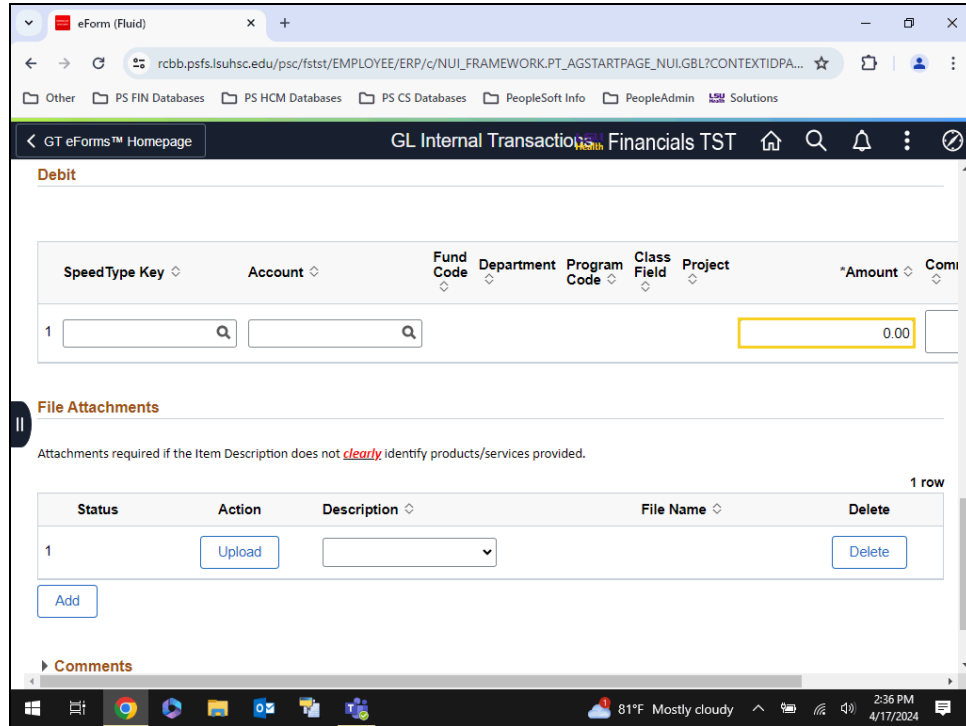
Internal Transaction Requests



Step	Action
32.	Click the Down button of the scrollbar. 

Training Guide

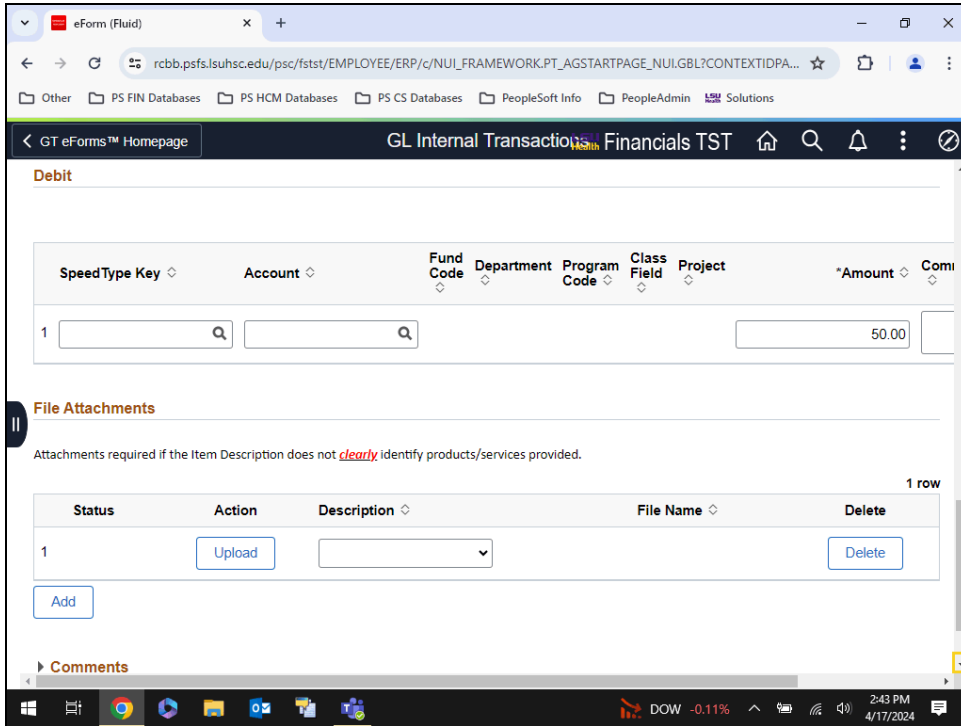
Internal Transaction Requests




Step	Action
33.	<p>Enter the Total Amount that will be charged to the receiving department.</p> <p>The Initiator may continue to enter the SpeedType and Account number for the department receiving the products or services. However, this is <u>not</u> required.</p> <p>Enter the desired information into the Amount field. Enter "50.00".</p>
34.	<p>NOTE: The File Attachment Section appears below the Debit section. Attachments are RECOMMENDED but not required. Attachments will benefit both departments as well as Accounting Services as the attachments remain with the documentation in PeopleSoft and paper copies would not be required. Select the Upload button to choose and attach the departments invoice. Multiple attachments may be added by selecting the Add button below the Attachment grid section. If the user chooses to remove an attachment, the user would select the Replace button that appears on the right side of the attachment row. It is only active once an attachment has been added.</p>

Training Guide

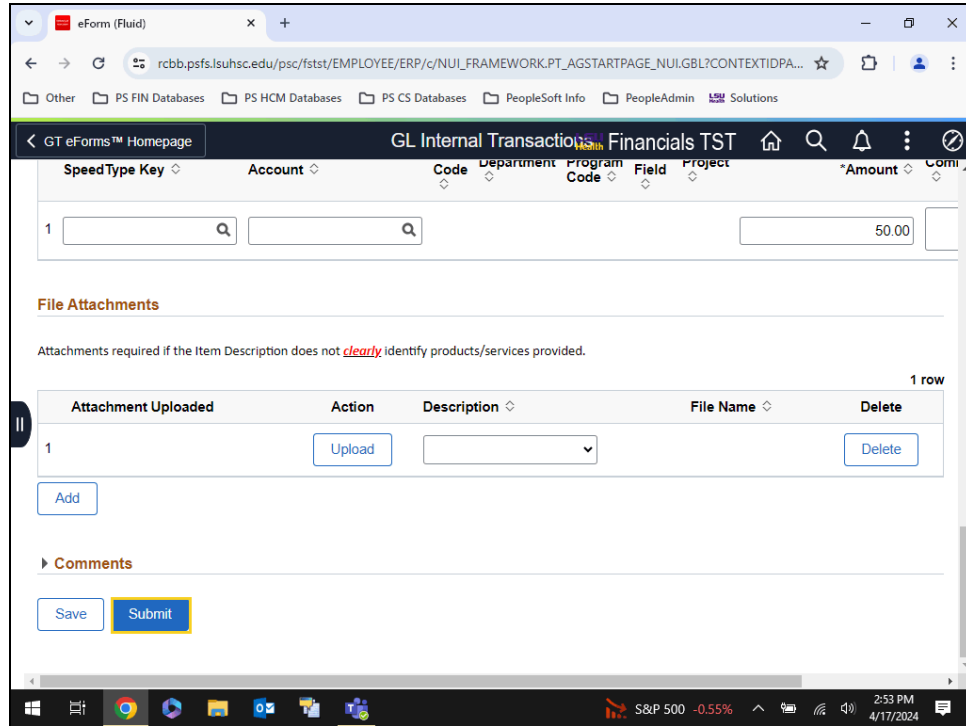
Internal Transaction Requests

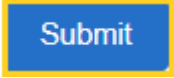


Step	Action
35.	<p>The form is complete and must be sent to the department for additional processing. Scroll to the bottom of the page and then select the Submit button.</p> <p>Click the Down button of the scrollbar.</p> 

Training Guide

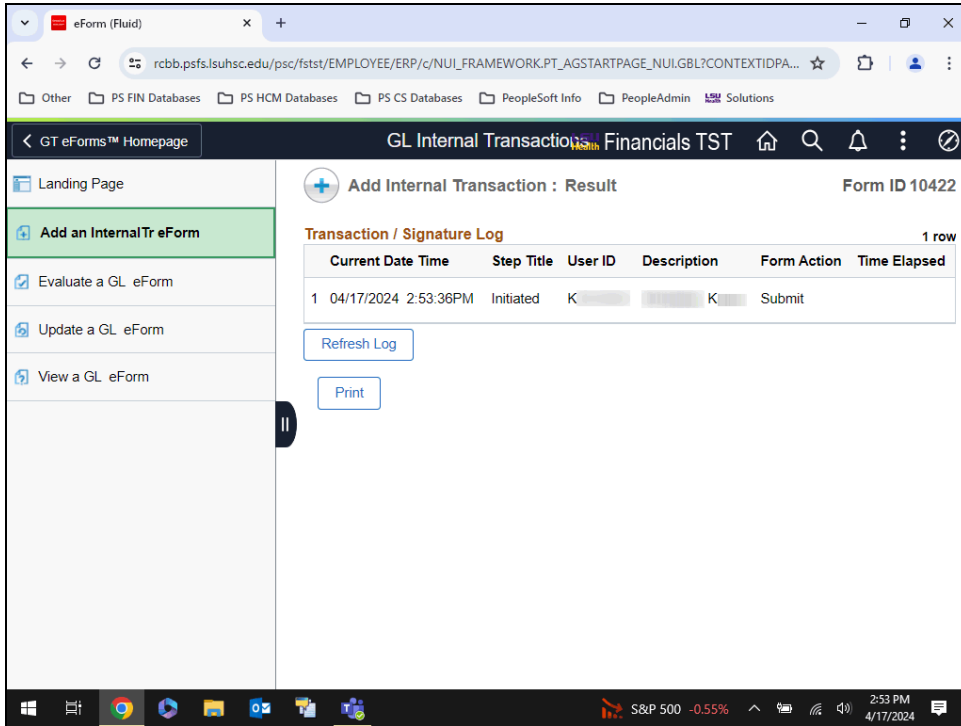
Internal Transaction Requests



Step	Action
36.	Click the Submit button.
	

Training Guide

Internal Transaction Requests



Step	Action
37.	The Transaction / Signature Log displays showing the form has been submitted and the process initiated.
38.	This completes <i>Add an Internal Tr eForm</i> . End of Procedure.