



Internal Purchase Funding Transfers (PT) Training

The Internal Purchase Funding Transfer (IPFT) module of the Financial Transaction System (FiTS) allows departments to transfer funds for professional services, continuing professional education, and other internal purchases of goods or services that are not in the normal course of business from one FOP (Fund-Organization-Program) to another. The Fund and Organization fields are 6-digit required codes and the Program field is a 2-digit required code. The Activity field is not a required field and should not be populated.

IPFT operating policy and procedure information is available in [HSC OP 50.29](#), Use of Internal Purchase Funding Transfer.

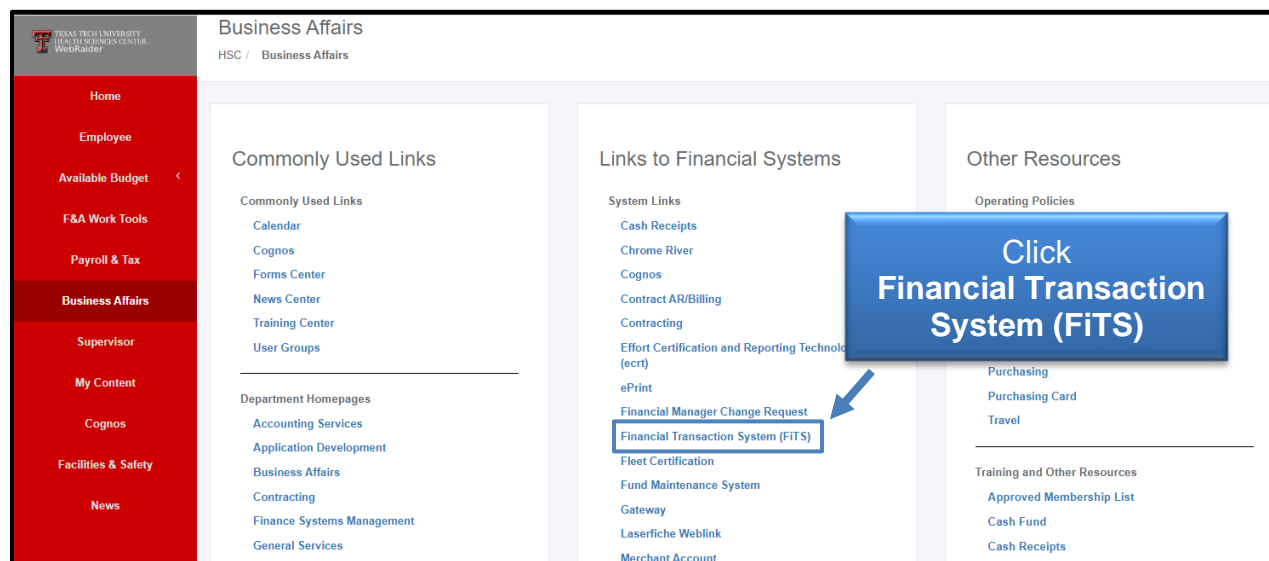
After review and approval, the system will post the IPFT to Banner. Departmental approval, functional review, and final approvals are managed through FiTS. Transaction tracking, archiving, and retrieving of information related to the IPFT is managed within the system as well.

FiTS allows a departmental user to do the following:

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

The system can be accessed from:

- [FiTS](#)
- [WebRaider portal](#) > Business Affairs tab > Links to Financial Systems > Financial Transaction System (FiTS)



Creating an IPFT

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

TEXAS TECH UNIVERSITY SYSTEM

PRODUCTION | V5.0142 | Texas Tech University |

Welcome to FITS

Create Cost Transfer Create IV Create Revenue JV **Create IPFT** Status History

Welcome to FITS

The Financial Transaction System consists of 3 modules, which include:

- Cost Transfers
Allows departments to move current fiscal year expenditures between departmental FOAPs

Begin each IPFT by selecting the letter H from the Chart drop-down box under the Purchase Transfer In section.

Continue under the Purchase Transfer In section by entering the Fund-Orgn-Prog or FOP of the department receiving payment for the professional services, continuing professional education, and other internal purchases of goods or services.

TEXAS TECH UNIVERSITY SYSTEM

PRODUCTION | V5.0142 | Texas Tech University |

Welcome to FITS

Create Cost Transfer Create IV Create Revenue JV **Create IPFT** Status History

Step 1 - IPFT Step 2 - Questions Attachments Comments Step 3 - Finish

Internal Purchase Funding Transfer

Purchase Transfer In

Total Transfer In :

CHART	FUND	ORGN	ACCT	PROG	ACTIVITY	AMOUNT	DESCRIPTION
H							

Add Clear

Purchase Transfer Out

Total Transfer Out :

CHART	FUND	ORGN	ACCT	PROG	ACTIVITY	AMOUNT	DESCRIPTION
-------	------	------	------	------	----------	--------	-------------

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

Internal Purchase Funding Transfers (PT) Training

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

Click **Add** after all required information is entered to save the progress.

Internal Purchase Funding Transfers

Purchase Transfer Id

Purchase Transfer In

Total Transfer In :

CHART	FUND	ORGN	ACCT	PROG	ACTIVITY	AMOUNT	DESCRIPTION
H	181836	251001		60		1.00	IPFT Transfer

Add Clear

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

When the Purchase Transfer In section has been completed, move to the Purchase Transfer Out section to enter the FOP of the department to be charged for the service(s) provided. Then enter the Amount of the payment to purchase to be transferred out, the Description of the purchase transfer out, which is limited to 35 characters, and click **Add**.

Internal Purchase Funding Transfers

Purchase Transfer Id **PT016850**

Posting Date : ☐ Prior EOM ☒ Current Date 05/01/2025

Purchase Transfer In

Total Transfer In : **1.00**

CHART	FUND	ORGN	ACCT	PROG	ACTIVITY	AMOUNT	DESCRIPTION
H	181836	251001		60		1.00	IPFT Transfer

Purchase Transfer Out

Total Transfer Out : **0.00**

CHART	FUND	ORGN	ACCT	PROG	ACTIVITY	AMOUNT	DESCRIPTION
H							

Add Clear

Selecting **Add** on the Purchase Transfer Out line will notify you of any budgetary errors that may exist in the form of a pop-up message.

Welcome to FiTS | Create Cost Transfer | Create IV | Create Revenue JV | Create IPFT | Status

Step 1 - IPFT | Step 2 - Questions Attachments Comments | Step 3 - Finish

Internal Purchase Funding Transfers

Purchase Transfer Id **PT016850**

Purchase Transfer In

Error Message, Click OK

Not enough available balance for fund 131001 orgn 511231 program 40. The available balance is .00

Click OK and then fix the errors.

OK

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

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

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

The screenshot displays the 'Internal Purchase Funding Transfers' interface. At the top, the 'Purchase Transfer Id' is PT016850. Below this, the 'Purchase Transfer In' section shows a total transfer in of 1.00. The 'Purchase Transfer Out' section shows a total transfer out of 1.00. A table lists the transfer lines with columns: CHART, FUND, ORGN, ACCT, PROG, ACTIVITY, AMOUNT, and DESCRIPTION. The first line is for Fund 181836, and the second line is for Fund 181061. A blue arrow points from a 'Click Edit' button to the 'Edit' button on the second line.

CHART	FUND	ORGN	ACCT	PROG	ACTIVITY	AMOUNT	DESCRIPTION
H	181836	251001	812BG0	60		1.00	IPFT Transfer
H	181061	111001	822BG0	60		1.00	IPFT Transfer

When editing the Purchase Transfer In line, changes to the Fund require that the Purchase Transfer Out line be deleted. This requirement is due to the system's auto-population of Account codes. Once the change to the Fund is made, the Purchase Transfer Out line must be reentered and added.

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

The screenshot shows the 'Step 2 - Questions Attachments Comments' tab. A blue arrow points to the 'Edit Answers' button. Another blue arrow points to the 'Select Step 2 - Questions Attachments Comments' button. The interface includes a table for questions and answers.

Question	Answer
Please attach documentation that supports the amount being charged for the good or service.	
What internal goods or services have been provided?	
Are these goods or services provided to TTUHSC departments on a regular basis?	
Is the rate charged for the goods or services used consistently for all TTUHSC department funds?	

In the Step 2 - Questions Attachments Comments tab, all of these questions must be answered with clear and adequate information. The three standard questions are:

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

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

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

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

After completing all of the required questions, click the **Save Answers** button. If you do not click **Save Answers** before navigating to another tab or page, the system will not save your answers and all the information entered will be lost.

Questions Attachments and Comments

PT016850

Questions

Save Answers Cancel

Click Save Answers

Question

Answer

Please attach documentation that supports the amount being charged for the good or service.

What internal goods or services have been provided?

TEST

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

In the Comments section, to add a comment, type the text into the box, then click **Add** to save the comment. Comments cannot be deleted after they have been added.

Attachments

Upload Attachment

Click Upload Attachment

Maximum File Size : 5 MB

Allowed file types: csv - doc - docx - pdf - ppt - pptx - xls - xlsx - xml

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

Comments

Add

Click Add to save a Comment

COMMENT

After all of the questions are answered, the required attachments are added, and any additional comments are provided, 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** (Started and will mark Complete later)
 - Saves your progress but will not mark the IPFT as complete.
 - Once clicked, it will return to a blank Step 1 - IPFT tab to begin a new IPFT, if desired.
 - To mark the IPFT as Complete after clicking this option, search for the IPFT in the Status tab (instructions located below).
- **Complete** (Mark as Complete)
 - Marks the IPFT as complete in the system, but will not route through approvals.
 - To send the IPFT to approvals after clicking this option, search for the IPFT in the Status tab (instructions located below).
- **Approvals** (Submit to Approvals)
 - Sends the IPFT to the Approval queues for each fund's TEAM App Financial Manager and Approver(s) and Accounting Services for review, approval, or rejection.

Step 1 - IPFT | Step 2 - Questions Attachments Comments | Step 3 - Finish

Finish Process

PT016850

Started and will mark Complete later

Mark as Complete

Submit to Approvals

Select Task

Selecting **Complete (Mark as Complete)** does not send the IPFT to approvals. In order to send the IPFT to approvals, navigate to the Status tab and locate the IPFT by the FiTS ID. Once located, click **Approvals**.

Status

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

Date from: Date to: Clear Dates

FITS Id: Search Clear Search

Select a Document Type: ☒ ALLOCTO ☐ VORTOPT

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			
PT016849	Completed	Shannon Myers	04 / 24 / 2025	Shannon Myers	Edit	Delete	Approvals
PT016850	Completed	Shannon Myers	05 / 01 / 2025	Shannon Myers	Edit	Delete	Approvals

Click Approvals

After the IPFT is submitted to approvals, the TEAM App Financial Managers or Approvers, along with Accounting Services will have the option to either Approve or Reject the IPFT. If errors or lack of justification are found, the IPFT will be rejected.

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

Questions Attachments and Comments

PT008319

Questions

[Edit Answers](#)

Question	Answer
Please attach documentation that supports the amount being charged for the good or service.	
What internal goods or services have been provided?	Test
Are these goods or services provided to TTUHSC departments on a regular basis?	Test
Is the rate charged for the goods or services used consistently for all TTUHSC department funds?	Test

Attachments

[Upload Attachment](#)

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

DOCUMENT NAME	DATE	ACTION
All Receipts.pdf	04/10/2020	Open

Click Comment

Comments

[Add](#)

COMMENT

PT1-SEE COMMENTS Request has been rejected

The rejection reason and any comments about the rejection will be shown in the form of a pop-up message.

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

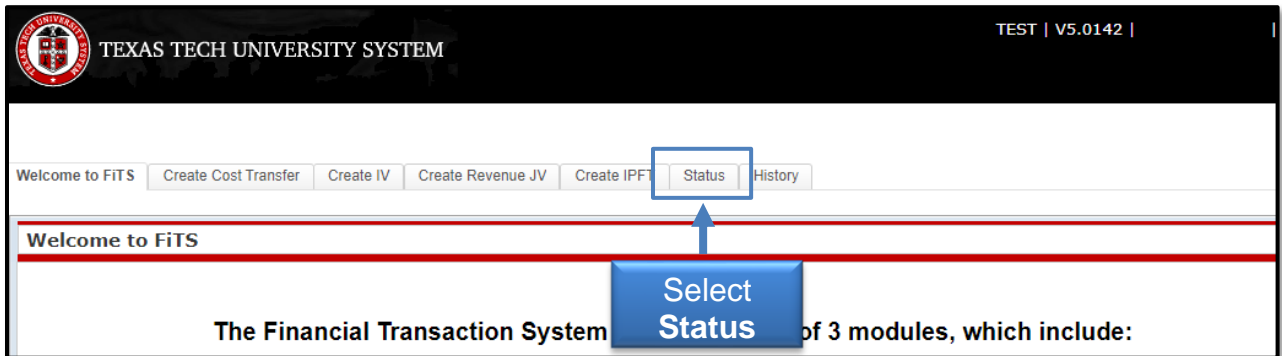
Note: IPFT requests not submitted for approval after 14 days will be automatically deleted for inactivity.

Deleting an IPFT

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

Internal Purchase Funding Transfers (PT) Training

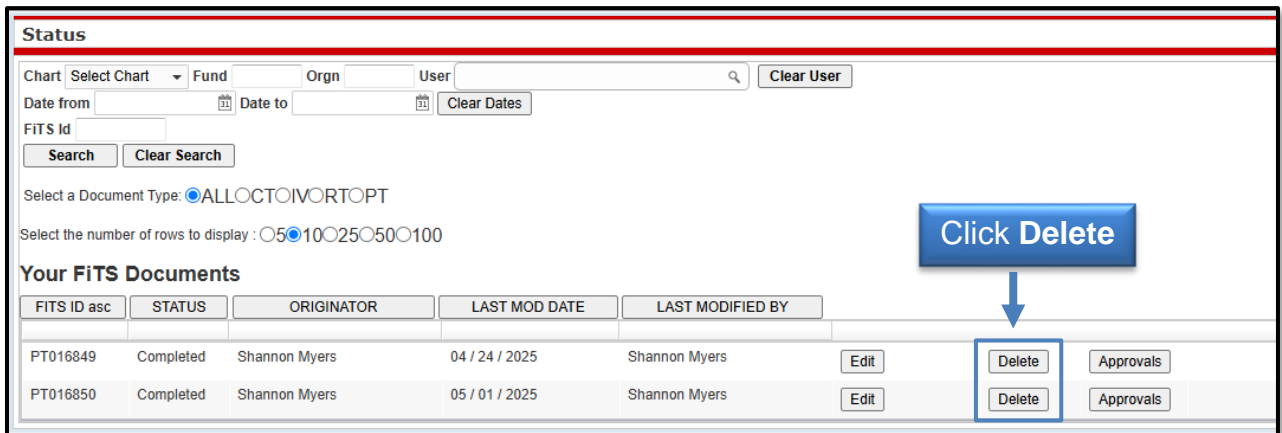
To delete an IPFT in FiTS, select the **Status** tab. The screen will populate with all of the FiTS documents you originated and have not been completely approved and processed or that need your approval (if you are a TEAM App Financial Manager or Approver).



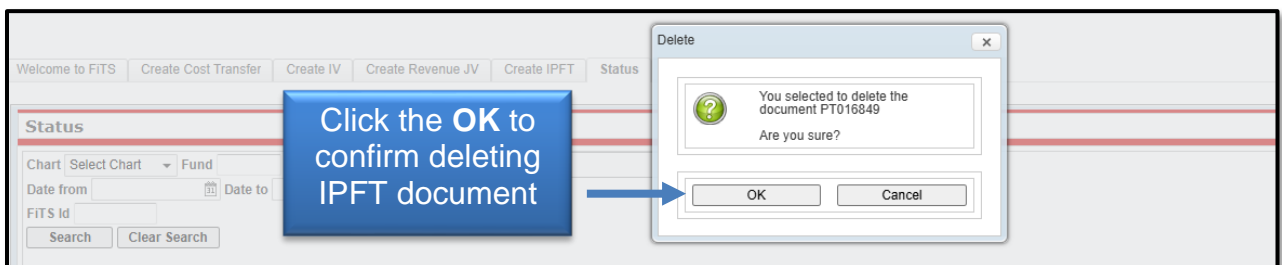
Search for the IPFTS(s) you wish to delete by Fund, Orgn, a Date Range that the IPFT was last modified, and/or FiTS ID, or by using the forward and back buttons at the bottom of the page.

*For more detailed instructions on how to use the search capabilities on the **Status** page, see page 13 of this training document.

Once the IPFT to be deleted is located, click **Delete** on the line of the selected IPFT.



After clicking Delete, a pop-up message will appear to confirm the selected IPFT document should be deleted. If the document selection is correct, click **OK**. If not, click **Cancel**.



If the IPFT does not have the Delete button populated to the right, you are not able to delete the request. In order to delete the IPFT, contact the TEAM App Financial Manager or Approver or Accounting Services Approver who is in the next approval queue to have it rejected in the system so you can then delete the request.

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

1. The FROM and TO Financial Manager are in the first approval group. If any one of these persons have not approved or rejected the request they will be able to reject the request (when a request is approved or rejected the Approve/Reject, Approved By, and Approval Date fields are populated with the noted information).
2. The FROM and TO Accountant are in the second approval group. If both the FROM and TO Financial Managers have not approved the request the persons in the FROM and TO Accountant will not be able to reject the request.

Approvals				
PT016841				
APPROVAL LEVEL	APPROVER	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Financial Manager	Approved	Jill	04/18/2025
TO Financial Manager	TEAM Financial Manager	Approved	Blai	04/18/2025
FROM Accountant	Fund Class Group - H 15 Micheal Evan West	Approved		04/18/2025
TO Accountant	Fund Class Group - H 13 Micheal Evan West	Approved		

After the IPFT has been rejected, you will need to search the Status tab for the FiTS ID to be deleted. You should now have the option to delete the IPFT.

Originators will receive an email from ITIS Transaction Entry System for any PTs that remain in the Status tab and have not been modified for 7 days informing them that the PT will be deleted the following Monday. To prevent the PT from being deleted, the Originator will need to make the necessary corrections before the following Monday.

Approving and Rejecting an IPFT

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

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

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

This screenshot shows the 'Approvals' tab for IPFT PT004318. The interface includes a top navigation bar with links like 'Welcome to FITS', 'Create Cost Transfer', 'Create IV', 'Create Revenue JV', 'Create IPFT', 'Status', 'History', and 'Control Tables'. Below this are three tabs: 'Step 1 - IPFT', 'Step 2 - Questions Attachments Comments', and 'Approvals'. The 'Approvals' tab is active, displaying a table with columns: 'APPROVAL LEVEL', 'APPROVAL GROUP', 'APPROVERS', 'APPROVE/REJECT', 'APPROVED BY', and 'APPROVAL DATE'. The table contains two rows of approval data. A blue callout box with an arrow points to the 'Step 2 - Questions Attachments Comments' tab, containing the text 'Click Step 2 to review justification'. Another blue callout box with an arrow points to the 'Step 1 - IPFT' tab, containing the text 'Click Step 1 to review IPFT'. At the bottom of the table, there is a 'Select' dropdown menu and a 'Save' button.

TEAM App Financial Manager and Approver(s) can edit the answers provided in the Questions section by selecting the **Edit Answers** button, then selecting **Save Answers** after the edits have been made. TEAM App Financial Managers and Approvers can add additional information in the form of an attachment or comment before approving or rejecting the IPFT.

After reviewing the IPFT, TEAM App Financial Managers and Approvers can choose whether to **Approve** or **Reject** the IPFT from the drop-down box. Only one approval or rejection from a TEAM App Financial Manager or Approver is required.

This screenshot shows the 'Approvals' tab for IPFT PT004318, similar to the previous one. A blue callout box with the text 'Select Approve or Reject' has an arrow pointing to the 'APPROVE/REJECT' column of the table. The dropdown menu for this column is open, showing two options: 'Approve' and 'Reject'. The table structure and other elements are consistent with the previous screenshot.

The TEAM App Financial Manager or Approver choosing to approve an IPFT will need to select **Approve** from the drop-down box on the Approvals tab and then click **Save**.

TEXAS TECH UNIVERSITY SYSTEM

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

Step 1 - IPFT | Step 2 - Questions Attachments Comments | **Approvals**

Approvals

PT004318

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group				
TO Financial Manager	TEAM Fund Group		Approve		

Save

After selecting **Save**, the system will ask to confirm approval for the IPFT. If a TEAM App Financial Manager or Approver has more than one fund on an IPFT, selecting **Yes** will initiate a blanket approval for all funds that belong to them.

If one of the funds needs to be rejected, select **Reject** first, otherwise the blanket approval will go into effect and will forward the IPFT to Accounting Services for approval and processing.

TEXAS TECH UNIVERSITY SYSTEM

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

Step 1 - IPFT | Step 2 - Questions Attachments Comments | **Approvals**

Approvals

PT004318

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group				
TO Financial Manager	TEAM Fund Group				
FROM Accountant					

Approve

Are you sure you wish to approve this document?

By clicking YES at this approval level then 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 at.

Yes No

If rejecting, a TEAM App Financial Manager or Approver must select **Reject** from the drop-down box under the Approvals tab. After selecting **Reject**, a Rejection Reason is required to be selected from the drop-down box and provide an explanation.

Internal Purchase Funding Transfers (PT) Training

The screenshot shows the 'Approvals' section for IPFT PT004318. A table lists approval levels and groups. A blue box labeled 'Select Reject' points to the 'APPROVE/REJECT' dropdown menu, which is currently set to 'Reject'. Another blue box labeled 'Select Rejection Reason' points to the 'REJECTION REASON: Select One' dropdown menu, which is currently set to 'PT1-SEE COMMENTS'. The 'Save' button is visible at the end of the row.

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group		Reject		
TO Financial Manager	TEAM Fund Group				
FROM Accountant	Fund Class Group				
TO Accountant	Fund Class Group - H 18				

Additional Routing

REJECTION REASON: Select One

PT1-SEE COMMENTS

Save

A TEAM App Financial Manager or Approver can add comments to clarify the reason for rejection or to request additional information from the Originator of the IPFT. After selecting the Rejection Reason and providing an explanation, click **Save** to save your progress.

The screenshot shows the 'Approvals' section for IPFT PT004319. The 'APPROVE/REJECT' dropdown menu is set to 'Reject'. A blue box labeled 'Click Save' points to the 'Save' button. Another blue box labeled 'Add Comments' points to the 'Optional Text:' text area, which contains the text 'Test Text'.

APPROVAL LEVEL	APPROVAL GROUP	APPROVERS	APPROVE/REJECT	APPROVED BY	APPROVAL DATE
FROM Financial Manager	TEAM Fund Group		Reject		
TO Financial Manager	TEAM Fund Group				
FROM Accountant	Fund Class Group - H 13				
TO Accountant	Fund Class Group - H 18				

Additional Routing

REJECTION REASON: Select One

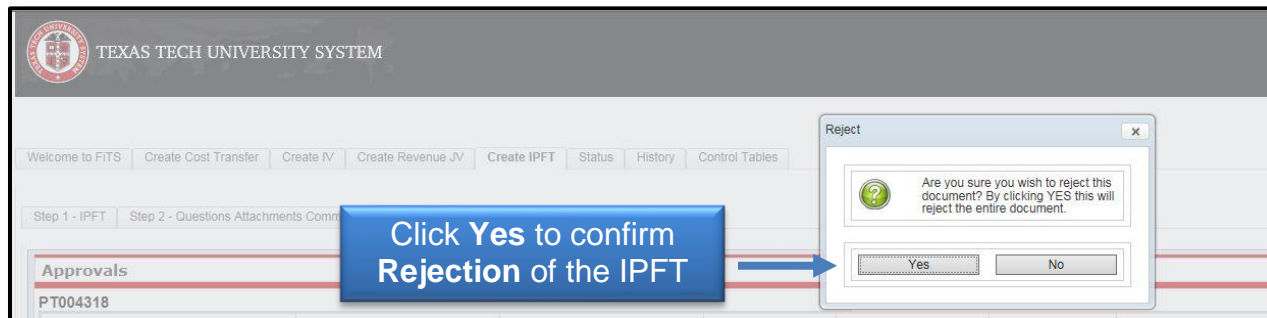
PT1-SEE COMMENTS

Optional Text:

Test Text

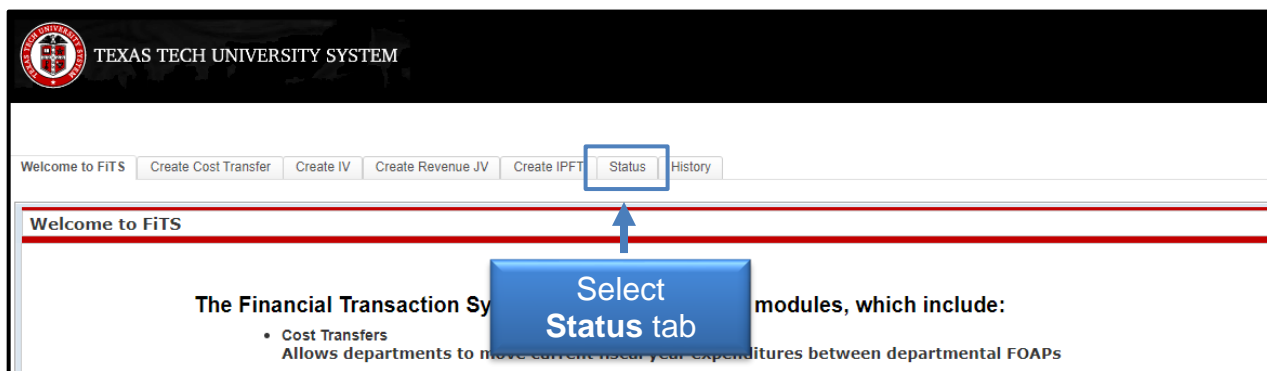
Save

After clicking Save, the system will ask you, in the form of a pop-up message, to confirm the rejection of the IPFT. If the selection is correct, click **Yes**. If not, click **No**.



Searching the Status Tab

The **Status** tab can be used to search for any IPFT(s) that have not been completely processed and are pending Completion or Approvals. To begin, click the **Status** tab from the home page.



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

Users can search for a specific IPFT the following ways:

- Chart: Use "H" for Health Sciences Center
- Fund & Orgn: Search by either Fund or Orgn, or both
- User: Search for all FiTS transactions a user is involved in; use the magnifying glass to select the correct name
- Date Range: Search by the last date a transaction was modified using the Date from field or by a date range
- FiTS ID: Search by 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.

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

The screenshot shows the top section of the application interface. A blue callout box labeled "Enter Search Parameters" points to the search input fields. Another blue callout box labeled "Click Search" points to the "Search" button. The interface includes fields for "Chart", "Fund", "Orgn", "User", "Date from", "Date to", and "FITS Id". There are also "Clear User" and "Clear Dates" buttons. At the bottom, there are radio buttons for "PT" and "CT", and a "Select the number of rows to" dropdown with options 5, 10, 25, 50, and 100.

Depending on how many results are returned, 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.

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

The screenshot shows the search results section. A blue callout box labeled "Select Document Type (PT)" points to the "Select a Document Type" dropdown menu, which has radio buttons for "ALLOCTO", "IV", "VORT", and "PT". Another blue callout box labeled "Select the Number of Rows to Display" points to the "Select the number of rows to display" dropdown menu, which has radio buttons for "5", "10", "25", "50", and "100". Below these are the search buttons and a table titled "Your FiTS Documents".

FITS ID asc	STATUS	ORIGINATOR	LAST MOD DATE	LAST MODIFIED BY			
PT016849	Completed	Shannon Myers	04 / 24 / 2025	Shannon Myers	Edit	Delete	Approvals
PT016850	Completed	Shannon Myers	05 / 01 / 2025	Shannon Myers	Edit	Delete	Approvals

The results will be sorted numerically by the FiTS ID. To sort the results by any of the other columnar fields, click the column header to sort by that field.

The search results will also display the following information:

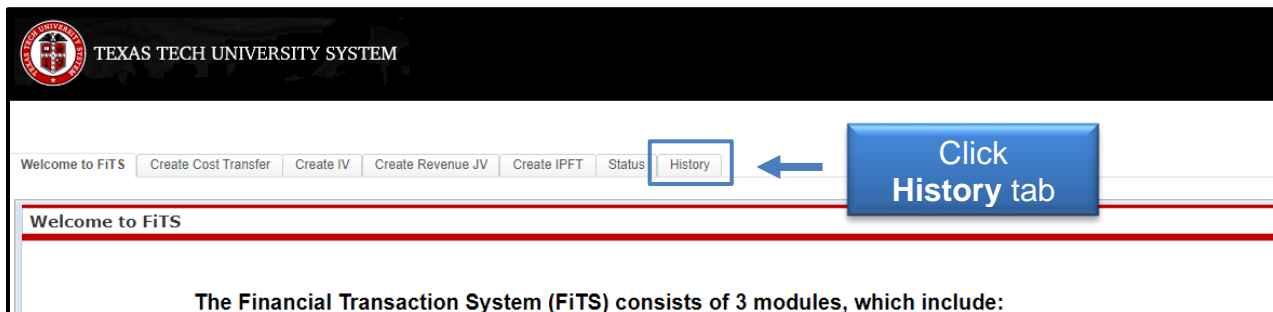
- Status: Stage of the FiTS process for the IPFT
- Originator: Person who submitted the IPFT
- Last Mod Date: Date of the last modification to the IPFT
- Last Modified By: User who last modified the IPFT

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

- **Started:** IPFT has been started by the Originator, but not marked complete. An Originator for an IPFT has the option to Edit or Delete the IPFT from FiTS.
- **Completed:** IPFT has been marked complete, but not submitted to Approvals. An Originator for an IPFT will have the option to Edit, Delete, or Approve. Selecting Approvals will send the IPFT into the approval process.
- **Submitted:** IPFT has been submitted for approvals. An Originator for the IPFT will be able to check the progress of the approvals. A Fund Manager or Approver will have the option to Approve or Reject the IPFT after clicking Review.
- **Rejected:** IPFT has been rejected in FiTS by a Fund Manager, Approver, or Accountant. An Originator will have the option to Edit or Delete the IPFT.
- **Errors:** IPFT has incurred an error while trying to post. Please contact Financial Systems Management at fsm@ttuhsc.edu for assistance.

Searching the History Tab

The History tab can be used to search for any IPFT(s) that has been processed and posted. To begin, click the **History** tab from the home page of FiTS.



The History tab does not automatically populate with any IPFTs. Users can search for a specific IPFT the following ways:

- **Chart:** Use H for Health Sciences Center
- **Fund & Orgn:** Search by either Fund or Orgn, or both
- **User:** Search all FiTS documents a user is involved in, use the magnifying glass to select the correct name
- **Date Range:** Search by the last date a transaction was modified using the Date from field or by a date range
- **Transaction Date:** Search by the documents Banner transaction date
- **Doc ID:** Search by all or a portion of the Banner Document ID that the IPFT was assigned when it was fully processed and posted
- **FiTS ID:** Search by 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.

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

The screenshot shows the Banner interface for the Texas Tech University System. At the top, there is a navigation bar with the university logo and the text "TEXAS TECH UNIVERSITY SYSTEM". Below this, there is a "Welcome to" message and a series of tabs: "Create Revenue JV", "Create IPFT", "Status", and "History". The "History" tab is currently selected. Below the tabs, there is a search section with various input fields: "Chart" (a dropdown menu), "Fund", "Orgn", "User" (with a search icon), "Date from", "Date to", "Trans Date", "Doc Id", and "FiTS Id". There are also "Clear User" and "Clear Dates" buttons. At the bottom of the search section, there are "Search" and "Clear Search" buttons. A blue box labeled "Enter Search Parameters" points to the search fields, and another blue box labeled "Click Search" points to the "Search" button.

Depending on how many results are returned, 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.

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

The results will be sorted numerically by the FiTS ID. To sort by any of the other columnar fields, click the column heading to sort by that field.

The search results will also display the following information:

- Doc ID: Banner Document number assigned when processed
- Originator: Person who submitted the IPFT
- Last Modified By: User who last modified the IPFT
- Last Modified Time: Date of the last modification to the IPFT
- Transaction Date: Transaction date the IPFT was posted to Banner

To view the detail of the processed IPFT, click **View**.

Internal Purchase Funding Transfers (PT) Training

The screenshot shows the 'History' page of the IPFT system. It includes a search bar with fields for 'Chart', 'Date from', 'Date to', 'Doc ID', and 'FITS ID'. Below the search bar is a 'Document Type' dropdown menu with 'PT' selected. A 'Select the Number of Results to Display' dropdown is set to '50'. A 'Click View' callout points to a 'View' button in the table. A 'Back & Forward Arrows' callout points to the navigation buttons at the bottom. The table lists five transactions with columns for FITS ID, DOC ID, ORIGINATOR, LAST MODIFIED BY, LAST MODIFIED TIME, and TRANSACTION DATE.

FITS ID asc	DOC ID	ORIGINATOR	LAST MODIFIED BY	LAST MODIFIED TIME	TRANSACTION DATE
PT016744	CZ012428	Tristyn	Nicole	04 / 08 / 2025	03 / 31 / 2025
PT016745	CZ012427	Tristyn	Nicole	04 / 08 / 2025	03 / 31 / 2025
PT016759	CZ012433	Linda	Adrie	04 / 09 / 2025	03 / 31 / 2025
PT016767	CZ012412	Brandon			
PT016769	CZ012418	Brandon			

If you have a policy question regarding the IPFT process, please contact Accounting Services at hscacc@ttuhsc.edu.

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