



E-IT (Electronic Internal Transfer) User Guide

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E-IT (Electronic Internal Transfer)

An E-IT is internal transfer between university projects either for sharing costs between a project or cost center or the correction of a posted transaction.

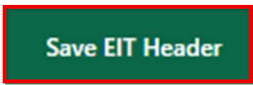
Create an E-IT

Sign into the Gibson Portal.	Services WaveWorks WaveWorks EIT
Click on the WW E-IT link under Services.	
Click on the Create Button.	Create

Complete the E-IT Header

Transaction Type, Date and Fiscal Year will automatically populate.	EIT HEADER Transaction Type (Select one) ** <input checked="" type="radio"/> Departmental Transaction <input type="radio"/> General Journal <small>Warning: Transaction Type cannot be changed once saved. Choose carefully.</small> Transaction Date ** 2025-12-31 Fiscal Year ** 2026 <small>Fiscal Year is locked by administrator</small>
Enter the transaction name.	Transaction Name ** <input type="text" value="Enter transaction name"/> This should indicate what the transaction is for Ex. Poster printing for student Smith
Enter the Cost Transfer Justification.	Cost Transfer Justification ** <input type="text" value="Provide justification for cost transfer"/> This should indicate the reason for the cost transfer Ex. Poster printing for John Smith to present at ABC conference

Save the EIT Header.



If no information is entered into the Header, the E-IT will not be saved



Once you save, a delete button will appear in case you need to delete before submission

Add Supporting Documents

Drag and Drop the supporting document or

Click on Drag and Drop to open the file

SUPPORTING DOCUMENTS

Accepted file types: DOC, DOCX, PDF, XLS, XLSX, TXT, PNG, JPG, JPEG, GIF, BMP

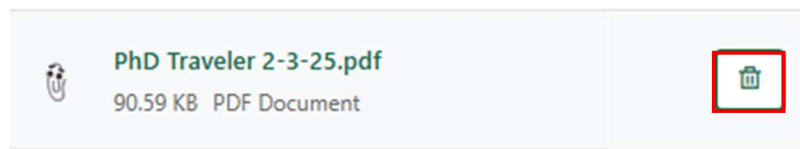
Maximum file size: 20MB per file



All E-ITs will require supporting documents. The upload will be automatically saved

This can be an email between departments, cost transfer justification, etc

Delete Supporting Documents



Delete an incorrect document after upload by using the trash can icon

Add the Accounting Information

Adding a GL Line Item

Click on the Plus sign next to GL Line Items.

GL LINE ITEMS



No GL line items added yet.

Click "Add GL Line Item" to get started.

Only projects beginning with the prefix GL will appear in the GL Line Items

****TIP**** Do not double click the plus sign; it takes a second to load

Adding a GL Line Item Using the GL Alias

Use the dropdown to choose debit or credit.

Debit or Credit: Debit 

This will determine if the project is paying from (debit) or receiving (credit) funds

Type the GLxxxxxx project number in the Alias box.

Alias:

Alternatively, searching by name is available. The search is not case sensitive
The Cost Center, Fund, Classification, and Project will auto populate and cannot be changed

Enter the Natural Account for this transaction.

Natural Account:

Search by name, number or the provided list
Natural accounts must have been previously used on the GL account to be found in this list, if a new combination is needed, please use the Skip Alias directions

Enter a Cost Center Program (previously Department Use Code in TAMS) if necessary.

Cost Center Program:

Search by name, number or the provided list


University Activity:

This will automatically populate

Enter the amount that will be debited or credited.

Amount:

Type in the date or use the provided calendar.

Activity Date: 

If this is a transfer of activity, choose the date of the activity

If this is new activity, please choose today's date
This date is informational only and will not have an impact on when the transaction is posted

Add a description for the transaction.

Description:

This description will appear on the transaction line level of your budget statements

Add more GL lines by clicking the plus sign.

GL LINE ITEMS



Save the GL Line Items.

 Save GL Line Items

Adding a GL Line Item Skipping the GL Alias

Click the Skip Alias button at the top of the GL Line-Item Box.

CREATE

Skip Alias

×

Proceed with all steps outlined above with the addition of manually adding the Cost Center, Fund, Classification and Project.

A screenshot of a 'CREATE' form. The form has a green 'CREATE' button at the top left. Below it are several input fields: 'Debit or Credit' (set to 'Debit'), 'Alias' (set to 'Not Selected'), 'Cost Center' (with a red box around the 'Type to search' text), 'Fund' (with a red box around the 'Type to search' text), 'Natural Account' (with 'Type to search' text), 'Classification' (with 'Type to search' text), 'Cost Center Program' (set to '00000 | Undefined Cost Center Program'), 'University Activity' (set to '0000 | Undefined University Activity'), 'Project' (with a red box around the 'Type to search' text), 'Amount' (with 'Enter amount (required)' text), 'Activity Date' (set to '01/19/2026'), and 'Description' (with 'Description' text).

If the combination you enter is not valid, you'll receive an error message
****TIP**** If using this to enter a new GL/Natural Account combination, find the GL information and screenshot the cost center, fund, and classification before clicking skip alias

Adding a Project Item Line

Click on the Plus sign next to Project Line Items.

PROJECT LINE ITEMS



No project line items added yet.

Click "Add Project Line Item" to get started.

****TIP**** Do not double click the plus sign; it takes a second to load

Use the arrow to choose debit or credit.

A screenshot of a 'Debit or Credit' dropdown menu. The text 'Debit or Credit:' is followed by a dropdown menu showing 'Debit' and a red box around the dropdown arrow.

This will determine if the project is paying from (debit) or receiving (credit) funds

Type the Project Number in the Project & Task box.

Project & Task: * Type to search and select project & task

Alternatively, searching by name is available. The search is not case sensitive

Only projects **not** beginning with the prefix GL will appear in the Project Line Items

Default Task (T01) and Cost Center Programs will be available as tasks-- chose Default Task (T01) if the charge is not associated with a Cost Center Program

The Project will appear in a box under the search.

Project & Task: *
Selected: ROBERT E
FLOWERREE FUND IN
PSYCHOLOGY (ER420089) |
Default Task (T01)

Only valid projects and tasks may be used

Enter the Expenditure Type (natural account).

Expenditure Type: * Type to search and select expenditure type

Enter the amount that will be debited or credited.

Amount: Enter amount (required)

Type in the date or use the provided calendar.

Expenditure Date: * 04/12/2026 

The Expenditure Date will determine the period in which the transaction line is posted in Projects

This cannot be a future date

Add a description for the transaction.

Description: Description

This description will appear at the transaction line level on your budget statements

Add more Project lines by clicking the plus sign.

PROJECT LINE ITEMS




Save the Project Line Items.

 Save Project Line Items

Submit an E-IT

Once all lines have been added, Validate the E-IT.


 Validate

 Submit EIT

 Return to Main Menu

Submit the E-IT.

 Validate

 Submit EIT

 Return to Main Menu

Edit an E-IT

Only E-ITs in draft mode may be edited.

Sign into the Gibson Portal.

Services
WaveWorks



Click on the WW E-IT link under Services.

Click on the Inquire Button.

Inquire

Enter appropriate Search Criteria and press the Search button.

Search Criteria

EIT Number: <input type="text" value="Enter exact EIT number"/>	Transaction Type: <input type="text" value="Select transaction types..."/>
Status: <input type="text" value="Select statuses..."/>	Submitter: <input type="text" value="Enter submitter email (partial match)"/>
Transaction Start Date: <input type="text" value=""/>	Transaction End Date: <input type="text" value=""/>
Transaction Name: <input type="text" value="Enter transaction name (partial match)"/>	
<input type="button" value="Search"/> <input type="button" value="Clear Results"/>	

Not all fields are required for a search

The search will only return EITs you initiated or approved

****TIP**** If a second search is needed, clear results first

Select Transaction to be edited from the search results by clicking the dropdown arrow.

Search Results (1 records found)

Details	EIT Number	Transaction Type	Transaction Name	Date	Status	Submitter
▼	243	Departmental Transaction	Training	2026-01-19	SUBMITTED	millidge@tulane.edu

Select the Edit button.

Transaction Details - EIT #243

TRANSACTION TYPE: Departmental Transaction
 TRANSACTION DATE: 2026-01-19
 TRANSACTION NAME: Training
 COST TRANSFER JUSTIFICATION: Training
 SUBMITTER: millidge@tulane.edu

STATUS: SUBMITTED
 FISCAL YEAR: 2026
 CREATED BY: millidge@tulane.edu
 CREATED DATE: 2026-01-19

 Edit  Return to Main Menu

The EIT must have a status of DRAFT to edit it

Edit the E-IT.

Delete E-IT, Update Header, Update Attachments, Update/Delete GL lines, Update/Delete Project Lines, submit for approval

Approve an E-IT

Sign into the Gibson Portal.

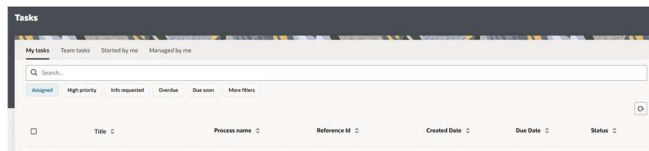
Services
 WaveWorks
 WaveWorks EIT

Click on the WW E-IT link under Services.

Click on the Approve Button.

Approve

Approve an E-ITs assigned to you.



Approve or Reject the E-IT.

APPROVED REJECTED

Click Approved to approve an E-IT
 Click Rejected to reject an E-IT

Assign to another approver using More Actions.

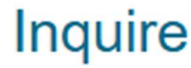
View an E-IT including Workflow

Sign into the Gibson Portal.



Click on the WW E-IT link under Services

Click on the Inquire Button.



Enter appropriate Search Criteria and press the Search button.

Search Criteria

EIT Number: Transaction Type:

Status: Submitter:

Transaction Start Date: Transaction End Date:

Transaction Name:

Not all fields are required for a search
The search will only return EITs you initiated or approved

Click on the Down Arrow to open the E-IT.

Search Results (1 records found)

Details	EIT Number	Transaction Type	Transaction Name	Date	Status	Submitter
▼	243	Departmental Transaction	Training	2026-01-19	SUBMITTED	millidge@tulane.edu

Transaction Details - EIT #229

TRANSACTION TYPE: Departmental Transaction STATUS: SUBMITTED
 TRANSACTION DATE: 2026-04-09 FISCAL YEAR: 2026
 TRANSACTION NAME: Training
 COST TRANSFER JUSTIFICATION: Test CREATED BY: millidge@tulane.edu
 SUBMITTER: millidge@tulane.edu CREATED DATE: 2026-04-09

Documents (1)

- PRD Traveler 2-0-25.pdf PDF Document 91.6 KB

GL Line Items (1)

Line #	Cost Center	Alias	Fund	Natural Account	Classification	Cost Cent.	University Activity
1	139210	GL221248-PROJECT MANAGEMENT OP	100	62110	670	00000	0000

Project Line Items (1)

Use the scroll bar to see workflow status.

Workflow Status	Approved By	Approval Date	Approval Stage	Pending Approver	Rejected By	Rejected Date
SUBMITTED	N/A	N/A	Stage 1	jshankar@tulane.edu.xxxxxxxx	N/A	N/A

Each line has its own workflow status

Click Return to Main Menu.

[Return to Main Menu](#) [+ Create EIT](#) [Export to Excel](#)

Export an E-IT

Sign into the Gibson Portal.

Services
WaveWorks
[WaveWorks EIT](#)

Click on the WW E-IT link under Services

Click on the Inquire Button.

Inquire

Enter appropriate Search Criteria and press the Search button.

Search Criteria

EIT Number: Transaction Type:

Status: Submitter:

Transaction Start Date: Transaction End Date:

Transaction Name:

[Search](#) [Clear Results](#)

Click Export to Excel.

[Return to Main Menu](#) [+ Create EIT](#) [Export to Excel](#)

The export will download to the computer's preferred location