TULANE UNIVERSITY

WaveWorks!

E-IT (Electronic Internal Transfer)

User Guide

Contents

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.

All EITs are classified as Department Transactions.

Transfer of Funds is a departmental transaction with natural accounts beginning with only a 9 (9XXXX).

Departmental Corrections are departmental transactions with natural accounts NOT beginning with 9, 88/89, or 5.

Recharge/Cost Recovery using natural accounts 88xxx/89xxx should only be used on internal, recharge transactions and should **ALWAYS** net to zero.

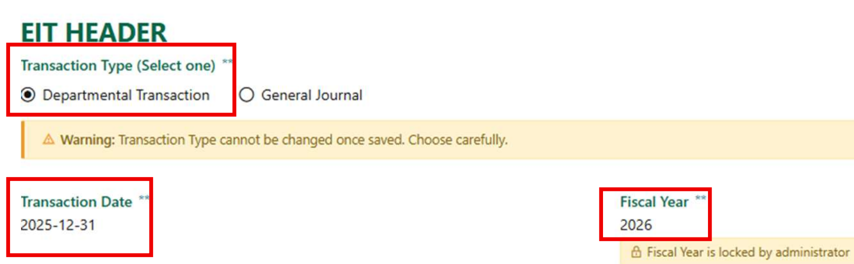
The preferred internet browser for the best EIT functionality is Chrome.

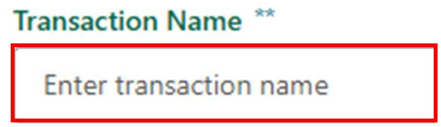
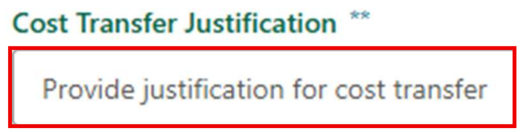
Create an E-IT

<table>
<tr><td>Sign into the Gibson Portal.

Click on the WW E-IT link under Services.</td><td>
</td></tr>
<tr><td>Click on the Create Button.</td><td>
</td></tr>
</table>

Complete the E-IT Header

<table>
<tr><td>Transaction Type, Date and Fiscal Year will automatically populate.</td><td>
</td></tr>
</table>

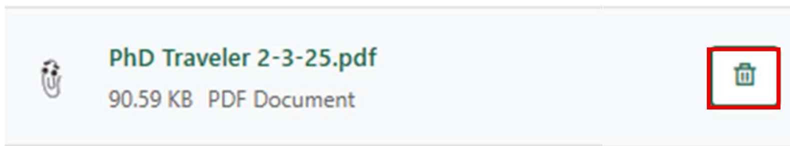
Enter the transaction name.	 This should indicate what the transaction is for Ex. Poster printing for student Smith DO NOT use special characters
Enter the Cost Transfer Justification.	 This should indicate the reason for the cost transfer Ex. Poster printing for John Smith to present at ABC conference DO NOT use special characters
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	 All E-ITs will require supporting documents. The upload will be automatically saved

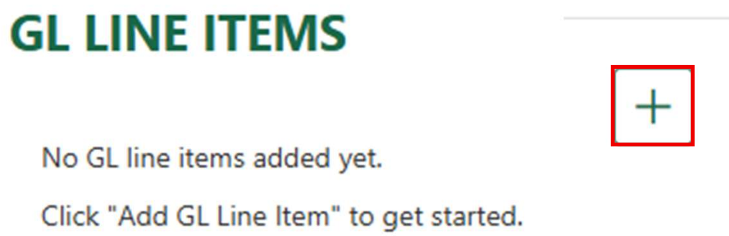
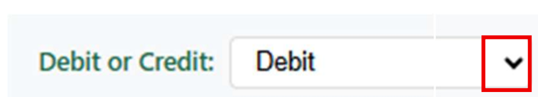
	This can be an email between departments, cost transfer justification, etc

Delete Supporting Documents

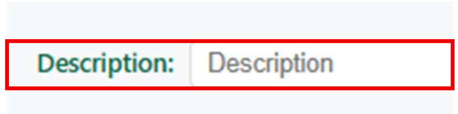
	 Delete an incorrect document after upload by using the trash can icon

Add the Accounting Information

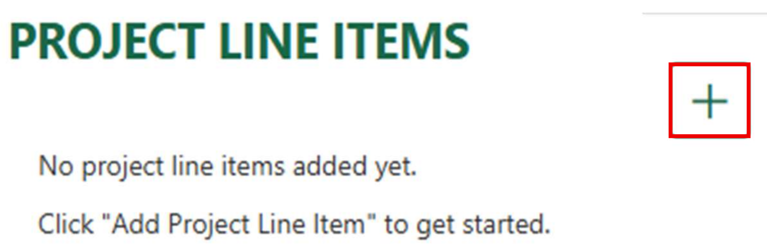
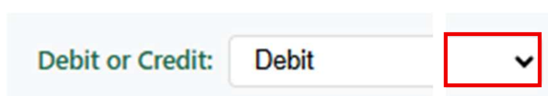
Adding a GL Line Item

Click on the Plus sign next to GL Line Items.	 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
Use the dropdown to choose debit or credit.	 This will determine if the project is paying from (debit) or receiving (credit) funds

Type the GLxxxxxx project number in the Alias box.	Alias: Type to search and select 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 To use a deposit or clearing account, search for the GL000000 account for your Cost Center (example GL000000-Student Depos)
Enter the Natural Account for this transaction.	Natural Account: Type to search Natural Account Search by name, number or the provided list Any natural account available may be used with any GL Project
Enter a Cost Center Program (previously Department Use Code in TAMS) if necessary.	Cost Center Program: Select or type to search Search by name, number or the provided list Any CCP may be used with any GL Project
	University Activity: This will automatically populate
Enter the amount that will be debited or credited.	Amount: Enter amount (required)
Type in the date or use the provided calendar.	Activity Date: 01/02/2026 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 <u>not</u> have an impact on when the transaction is posted

Add a description for the transaction.	 This description will appear on the transaction line level of your budget statements
Add more GL lines by clicking the plus sign.	
Save the GL Line Items.	

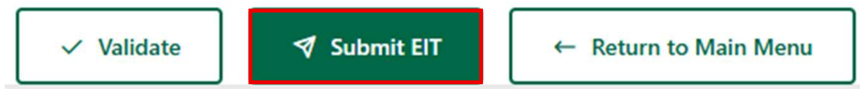
Adding a Project Item Line

Click on the Plus sign next to Project Line Items.	 **TIP** Do not double click the plus sign; it takes a second to load
Use the arrow to choose debit or credit.	 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** +

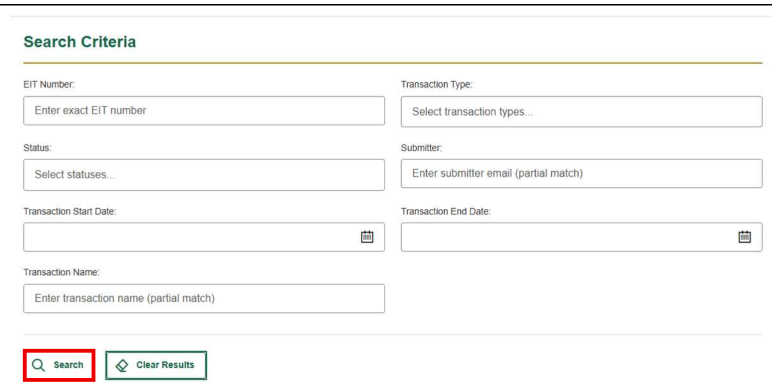
Save the Project Line Items.	

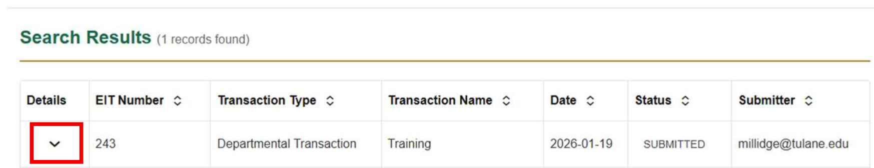
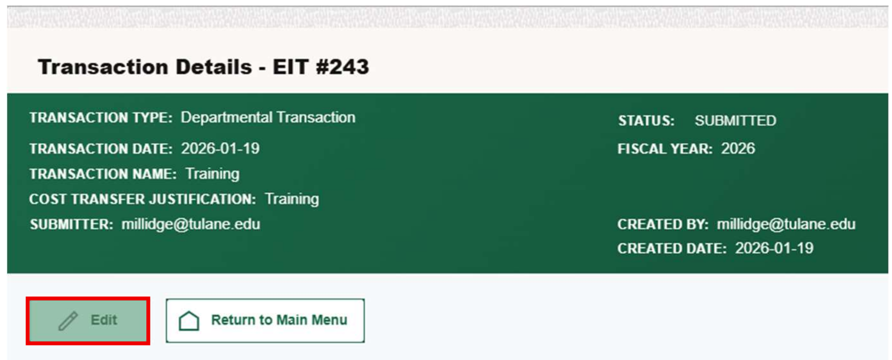
Submit an E-IT

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

Edit an E-IT

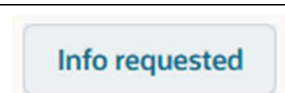
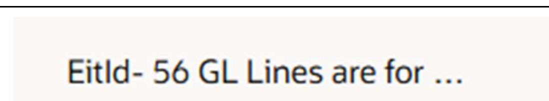
Only E-ITs in draft mode may be edited.

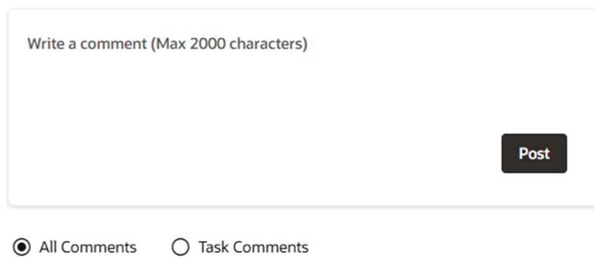
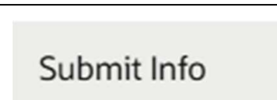
Sign into the Gibson Portal. Click on the WW E-IT link under Services.	
Click on the Inquire Button.	
Enter appropriate Search Criteria and press the Search button.	 Not all fields are required for a search The search will only return EITs you initated or approved **TIP** If a second search is needed, clear results first

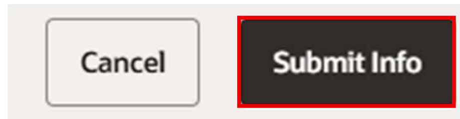
Select Transaction to be edited from the search results by clicking the dropdown arrow.	
Select the Edit button.	 The EIT must have a status of DRAFT to edit it
Edit the E-IT.	Delete E-IT, Update Header, Update Attachments, Update/Delete GL lines, Update/Delete Project Lines, submit for approval

Provide Requested Info to an Approver

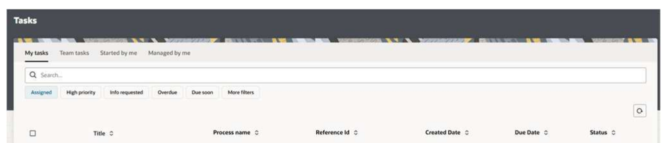
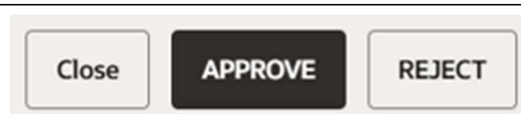
If information is requested by an approver, the EIT initiator will receive an email. These are the steps to provide that information.

Sign into the Gibson Portal. Click on the WW E-IT link under Services.	
Click on the Approve Button.	
Toggle to Info Requested on the My Tasks tab.	 The EIT needing more information should appear here
Click on the EIT needing attention.	

<table>
<tr><td>Use the icons on complete the appropriate action.</td><td></td></tr>
<tr><td>Post a Comment.</td><td></td></tr>
<tr><td>Click Post.</td><td>
</td></tr>
<tr><td>Add an attachment.</td><td></td></tr>
<tr><td></td><td>
</td></tr>
<tr><td>Review the history of the request.</td><td></td></tr>
<tr><td>See more information.</td><td></td></tr>
<tr><td>After adding comments or attachments, click More Actions.</td><td>
</td></tr>
<tr><td>Click Submit Info.</td><td>
</td></tr>
</table>

Add a Comment.	
Click Submit Info.	

Approve an E-IT

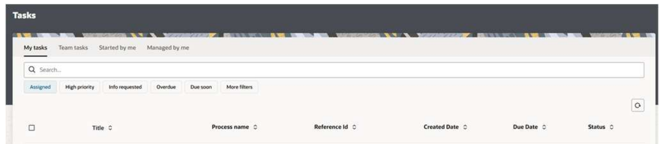
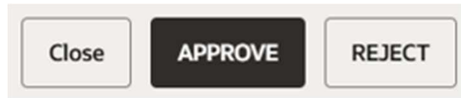
Sign into the Gibson Portal. Click on the WW E-IT link under Services.	
Click on the Approve Button.	
Approve an E-ITs assigned to you.	 If no EITs are available, check My Team Tasks
View Attachments from the Approver Screen.	 Attachments may also be viewed from the email notification
Approve or Reject the E-IT.	 **TIP** Add comments **before** pressing the Reject Button for the initiator including the reason and the action to correct; the initiator will receive an email with the rejection and the reason
Assign to another approver using More Actions.	

Delegate the Approval of an E-IT

Sign into the Gibson Portal. Click on the WW E-IT link under Services.	**Services** WaveWorks WaveWorks EIT
Click on the Delegate Button.	Delegate
Search for the user to assign as the delegate	**Delegated To** ** Delegated To Search is by Tulane email address
Choose a Start Date.	**Start Date** ** Start Date
Choose an End Date.	**End Date** ** End Date
Click Save Profile.	**Save Profile** ← **Return to Main Menu**

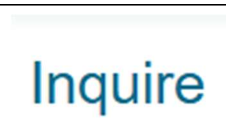
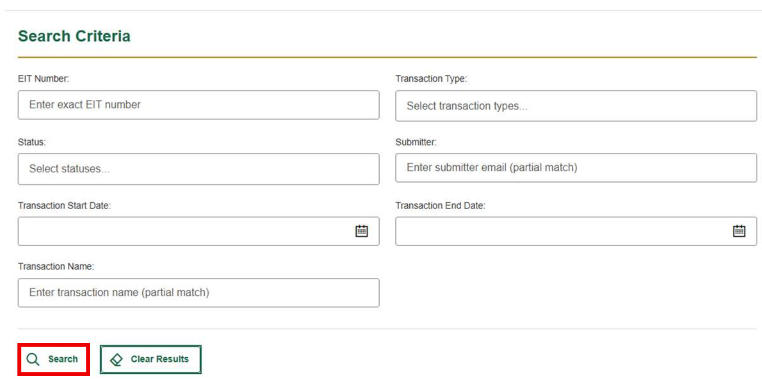
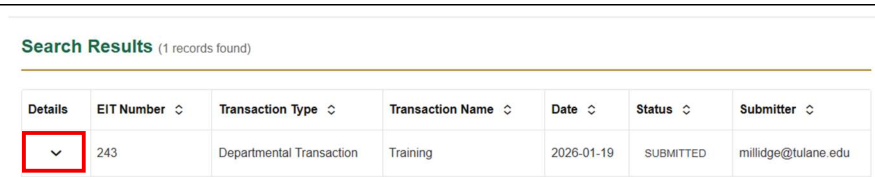
Add an Approver to the EIT Workflow as an Approver

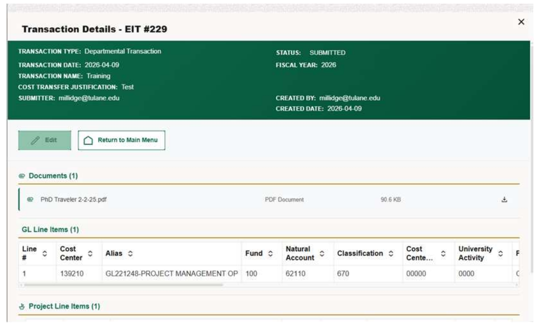
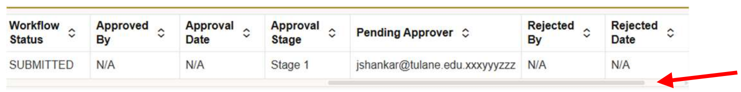
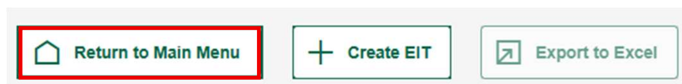
Sign into the Gibson Portal. Click on the WW E-IT link under Services.	**Services** WaveWorks WaveWorks EIT
Click on the Approve Button.	Approve

<table>
<tr><td>Open the E-IT.</td><td>
If no EITs are available, check My Team Tasks</td></tr>
<tr><td>Add the additional Approver.</td><td>
This is just under Comments</td></tr>
<tr><td>Approve the EIT.</td><td>
Approving the EIT will send to the additional approver</td></tr>
</table>

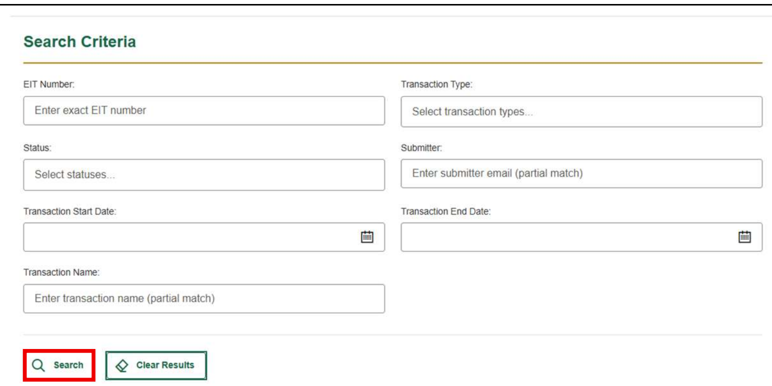
View an E-IT including Workflow

<table>
<tr><td>Sign into the Gibson Portal.

Click on the WW E-IT link under Services</td><td></td></tr>
<tr><td>Click on the Inquire Button.</td><td></td></tr>
<tr><td>Enter appropriate Search Criteria and press the Search button.</td><td>
Not all fields are required for a search
The search will only return EITs you initated or approved</td></tr>
<tr><td>Click on the Down Arrow to open the E-IT.</td><td></td></tr>
</table>

	
Use the scroll bar to see workflow status.	 Each line has its own workflow status Stage 2 Aprovers are from the accounting group responsible for the approval
Click Return to Main Menu.	

Export an E-IT

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.	

Click Export to Excel.	 The export will download to the computer’s preferred location

E-IT Statuses

Draft	The EIT has not been submitted for approval.
Submitted	The EIT has been validated and has entered the approval flow.
Approved	All EIT lines have been approved at all stages.
Rejected	If a single line is rejected by any approver, the entire EIT is returned to the initiator for correction. Once the correction is made and the EIT is resubmitted, the approval workflow restarts from the beginning, and both GL and Project lines return to Stage 1 approval.
Imported	The EIT has been processed in the WaveWorks finance module (ERP).
Request for More Information	When an approver requests additional information, the initiator receives an email notification. Users can also monitor these requests through My Tasks. Change the view from Assigned to Info Requested to view.
Stage 1 Approval	Approval needed from Cost Center or Task Managers
Stage 2 Approval	Approval needed from the Core Accounting group responsible for the approval.