



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.

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

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 **

This should indicate what the transaction is for
Ex. Poster printing for student Smith
DO NOT use special characters

Enter the Cost Transfer Justification.

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

SUPPORTING DOCUMENTS

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

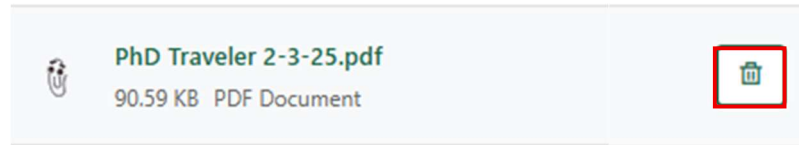
Maximum file size: 20MB per file

Drag and Drop
Select or drop files here.

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



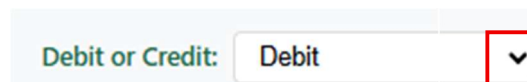
No GL line items added yet.

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

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 GL0- and choose the account for your Cost Center (example GL0-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 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 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.

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.

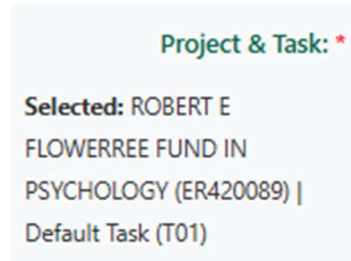
A screenshot of a search box with the label "Project & Task: *" and a placeholder text "Type to search and select project & task". The box is highlighted with a red border.

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

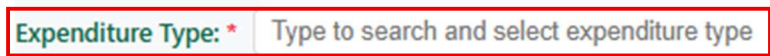
Default Task (T01) and Cost Center Programs will be available as tasks-- chose Default Task (T01) if the charge is not associated with a Cost Center Program

The Project will appear in a box under the search.

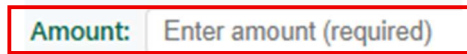
A screenshot of a dropdown menu for "Project & Task: *". The selected item is "ROBERT E FLOWERREE FUND IN PSYCHOLOGY (ER420089) | Default Task (T01)".

Only valid projects and tasks may be used

Enter the Expenditure Type (natural account).

A screenshot of a search box with the label "Expenditure Type: *" and a placeholder text "Type to search and select expenditure type". The box is highlighted with a red border.

Enter the amount that will be debited or credited.

A screenshot of an input field with the label "Amount:" and a placeholder text "Enter amount (required)". The field is highlighted with a red border.

Type in the date or use the provided calendar.

A screenshot of an input field with the label "Expenditure Date: *" and a date value "04/12/2026". A calendar icon is visible to the right of the field. The field is highlighted with a red border.

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.

A screenshot of an input field with the label "Description:" and a placeholder text "Description". The field is highlighted with a red border.

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)"/>	

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

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.

Services
 WaveWorks
 WaveWorks EIT

Click on the WW E-IT link under Services.

Click on the Approve Button.

Approve

Toggle to Info Requested on the My Tasks tab.

Info requested

The EIT needing more information should appear here

Click on the EIT needing attention.

EitId- 56 GL Lines are for ...

Use the icons on complete the appropriate action.



Post a Comment.



Click Post.

Write a comment (Max 2000 characters)

Post

All Comments Task Comments

Add an attachment.



Drag and Drop

Select a file or drop one here



Review the history of the request.



See more information.



After adding comments or attachments, click More Actions.

Save

More Actions ▼

Click Submit Info.

Submit Info

Add a Comment.

Comments

Click Submit Info.

Cancel

Submit Info

Approve an E-IT

Sign into the Gibson Portal.

Services

WaveWorks

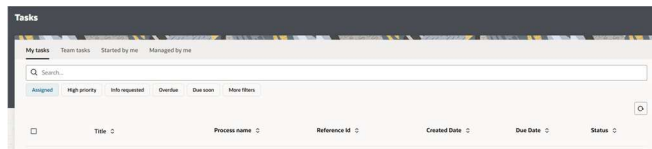
WaveWorks EIT

Click on the WW E-IT link under Services.

Click on the Approve Button.

Approve

Approve an E-ITs assigned to you.



If no EITs are available, check My Team Tasks

View Attachments from the Approver Screen.

Attachments

Attachments may also be viewed from the email notification

Approve or Reject the E-IT.

Close

APPROVE

REJECT

****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.

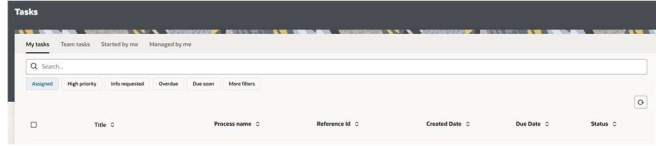
Delegate the Approval of an E-IT

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

Add an Approver to the EIT Workflow as an Approver

Sign into the Gibson Portal. Click on the WW E-IT link under Services.	<p>Services WaveWorks WaveWorks EIT</p>
Click on the Approve Button.	<p>Approve</p>

Open the E-IT.



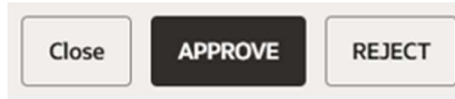
If no EITs are available, check My Team Tasks

Add the additional Approver.

Additional Approver

This is just under Comments

Approve the EIT.



Approving the EIT will send to the additional approver

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.

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:

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

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	<p>If a single line is rejected by any approver, the entire EIT is returned to the initiator for correction.</p> <p>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.</p>
Imported	The EIT has been processed in the WaveWorks finance module (ERP).
Request for More Information	<p>When an approver requests additional information, the initiator receives an email notification.</p> <p>Users can also monitor these requests through My Tasks. Change the view from Assigned to Info Requested to view.</p>
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.