

## FAQ Document – Internal Transactions

The purpose of this document is to build a running list of common questions regarding Internal Transaction Processing for the LSUNO and LSUSH Business Units

### 1. I created an Internal Transactions for a service my department (Credit) provided to another department (Debit) for which I am also an approver. Why can I not approve the Internal Transaction as the Debit department approver?

A user may not approve a request that he or she created even if they have approval access for the receiving department. We highly recommend having 2 approvers assigned for every department so that the other approver may complete the approval in these cases.

### 2. How can I find Internal Transactions pending my approval?

- a. Users can use their email to update as well as approve internal transactions by selecting the link within the email.

From: PS Financials Development <psfindev@lsuhsc.edu>  
 Sent: Monday, May 20, 2024 10:08 AM  
 To: Lovell, B.J. <BLovel@lsuhsc.edu>; Sanford, Clayton H. <csanf4@lsuhsc.edu>; Bonura, Karen <kbonur@lsuhsc.edu>; Gonzales, Michele S. <mgonza@lsuhsc.edu>; Liu, Shiyong <SLiu1@lsuhsc.edu>; Williams, Tlesia M. <twil11@lsuhsc.edu>  
 Subject: LSUNO Internal Transaction Form 10335 is Pending Dept Approval

You have an internal transaction request to evaluate. You may follow the link below to approve it.  
 eForm ID: 10335  
 Request Date: 2024-01-16  
 From Department: Surgery  
 To Department: Center-Cancer  
 Invoice: CIAIM-3999192; Amount: 120

Link to Update the IT eForm: [https://rcbb.psf.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH\\_FL.GBL?Page=G3SEARCH\\_FL&Action=U&G3FORM\\_ID=10335&G3FORM\\_TASK=UPD](https://rcbb.psf.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=10335&G3FORM_TASK=UPD)  
 Link to Approve IT eForm: [https://rcbb.psf.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH\\_FL.GBL?Page=G3SEARCH\\_FL&Action=U&G3FORM\\_ID=10335&G3FORM\\_TASK=EVL](https://rcbb.psf.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=10335&G3FORM_TASK=EVL)

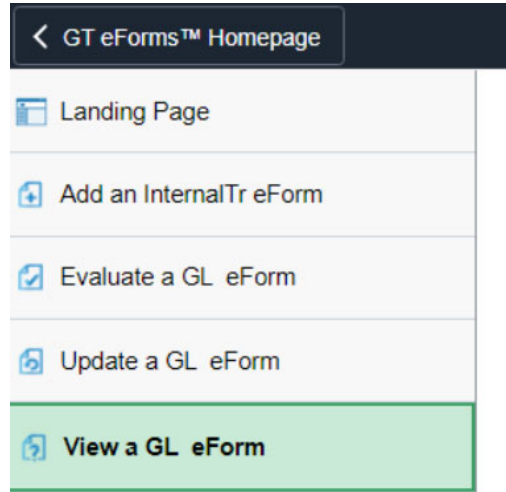
To enter information and review

Reply Reply all Forward

- b. Users can navigate to their Worklist to view internal transactions. If the data is fully complete, the user can approve. However, if the data requires completion, the user will not be able to approve from the Worklist.

From	Date From	Work Item	Priority	Worked By Activity	Business Process Name	Link	
Liu, Shiyong	05/20/2024 10:08:28AM	Notification Worklist			G3FORM_ALL	<a href="#">InternalTr eForm - Form ID: 10335</a>	Mark
Liu, Shiyong	04/22/2024 12:28:54PM	Notification Worklist			G3FORM_ALL	<a href="#">ClinCards eForm - Form ID: 10425</a>	Mark
Liu, Shiyong	04/01/2024 9:35:33AM	Notification Worklist			G3FORM_ALL	<a href="#">InternalTr eForm - Form ID: 10243</a>	Mark
Keegan, John	03/22/2024 8:48:24AM	Notification Worklist			G3FORM_ALL	<a href="#">InternalTr eForm - Form ID: 10239</a>	Mark
Liu, Shiyong	03/19/2024 2:08:57PM	Notification Worklist			G3FORM_ALL	<a href="#">InternalTr eForm - Form ID: 10240</a>	Mark
						<a href="#">Requisition 691861, 79860, CANCELED 2012-10-</a>	

- c. Users can navigate via the GTeForms Home. The user can choose to Update the form to enter data, add attachments, make comments. The Evaluate menu option is used to Approve the internal transaction form. The View menu option may be used to review and print an internal transaction form.



**3. How can I easily find Internal Transactions where my department is either the credit department (provider of goods/service) or the debit department (receiver)?**

There are 3 easy ways to search for the Internal Transactions for your department.

- a. There is a query called INTERNAL\_TRANSACTION\_FORM\_DEPT that prompts for the business unit and deptid from or to. It displays all Internal Transactions where the entered department id is either the provider or receiver of the transaction. The query results display 2 rows per internal transaction that show the debit and credit sides of the data.

Row	Form ID	Unit	Request Date	From DEPT	From Department	To DEPTID	To Department	Requestor	Invoice	SpeedType	Account	Fund	Dept	Program	Class	Project	Comment
1	10396	LSUNO	03/26/2024	1673200	Peoplesoft Admin Support Org	1651000	Accounting Services	MGONZA_IT_TEST01		5651000007	530600	113	1651000	52000	45700	5651000007	Debit dept entry ex
2	10396	LSUNO	03/26/2024	1673200	Peoplesoft Admin Support Org	1651000	Accounting Services	MGONZA_IT_TEST01		5673200001	530600	113	1673200	54000	90110	5673200001	-50.00 Ex for document
3	10397	LSUNO	03/26/2024	1673200	Peoplesoft Admin Support Org	1651000	Accounting Services	MGONZA_IT_2_PSFIN		5651000001	530600	113	1651000	52000	40110	5651000001	300.00
4	10397	LSUNO	03/26/2024	1673200	Peoplesoft Admin Support Org	1651000	Accounting Services	MGONZA_IT_2_PSFIN		5673200001	530600	113	1673200	54000	90110	5673200001	-300.00
5	10415	LSUNO	04/09/2024	1673200	Peoplesoft Admin Support Org	1490100	M_S-Administration	MGONZA_TEST_CARLY_APPRVR									200.00 Testing Widgets
6	10415	LSUNO	04/09/2024	1673200	Peoplesoft Admin Support Org	1490100	M_S-Administration	MGONZA_TEST_CARLY_APPRVR		5673200001	541200	113	1673200	54000	90110	5673200001	-200.00 Testing

The test data results are displayed for business unit LSUNO where deptid 1673200 was either the debit or credit department.

- b. The user could navigate to the GTeForms Home, select the View a GL eForm menu navigation. Enter the Business unit. You may enter any additional information you have such as the form id, date, requested by userid or the from or to department. After entering the data, press the Search button.

In this example, search for LSUNO Internal Transactions requested by KOCONN.

The screenshot shows the search interface for GL Internal Transactions. The search criteria are: Business Unit: LSUNO, Requested by: KOCONN. The 'View a GL eForm' menu item is highlighted.

The results display.

Business Unit	Date	Form ID	Form Status	Requested by	Invoice	From DEPTID	From Department	To DEPTID	To Department
1 LSUNO	2024/04/08	10411	Withdrawn	KOCONN	GA-031924	(blank)	Accounting Services	(blank)	Animal Labs-Downtown Campus
2 LSUNO	2024/04/11	10421	On Hold	KOCONN	GA-041124	(blank)	Accounting Services	(blank)	Animal Labs-Downtown Campus
3 LSUNO	2024/04/17	10422	Executed	KOCONN	GA-041724	(blank)	Accounting Services	(blank)	Animal Labs-Downtown Campus

Each of the Internal Transactions created by KOCONN display. In the list, you can see that one was withdrawn, one is on hold, and one was executed. You may select the link on any of the forms to view the details, and all comments for that form.

**4. What is the difference between the Form Id and the Invoice ID?**

The Form ID is the system generated number assigned to the internal transaction form. The Invoice ID is the number that the department submitting the internal transaction uses for their internal record keeping. The journal line description that the accounting team will enter for the journal will include the invoice number entered by the department. The journal id will include the IT number.

**5. How do I request to add access or remove access to the Internal Transaction Form for staff?**

- a) For access additions or removals for LSUNO, submit the request to [generalaccounting@lsuhsc.edu](mailto:generalaccounting@lsuhsc.edu), attn: Karen Bonura.
- b) For access additions or removals for LSUSH, submit the request to [steven.mcalister@lsuhs.edu](mailto:steven.mcalister@lsuhs.edu)
- c) Roles, route controls profiles, and User Preference needs for a user to be an Internal Transaction Requester, a user who initiates the request:
  - Role - LSU\_GL\_GT\_INTTRANS\_REQUESTER
  - Route Control – BU\_XXXX, for the campus
  - User Preference settings – General – Setid = SHARE and BU for the campus, either LSUNO or LSUSH
- d) Roles, route controls profiles, and User Preference needs for a user to be an Internal Transaction Approver, a user who approves a request:
  - Role - LSU\_GL\_GT\_INTTRANS\_APPROVER
  - Route Control – BU\_XXXX, for the campus and the department route control. List all department ids for which the user may approve.
  - User Preference settings – General – Setid = SHARE and BU for the campus, either LSUNO or LSUSH
- e) Roles, route controls profiles, and User Preference needs for a user to be an Internal Transaction Requester for Internal Transactions created as well as an Approver for Internal Transactions from another department.
  - Roles – LSU\_GL\_GT\_INTTRANS\_REQUESTER, LSU\_GL\_GT\_INTTRANS\_APPROVER
  - Route Controls – BU\_XXXX and all department ids for which the user may approve
  - User Preference General Settings – Setid = SHARE and BU = their campus
  - REMINDER- users may not approve Internal Transactions that they initiate.