Internal Transaction Requests - LSUNO

Version Date: November 5, 2025

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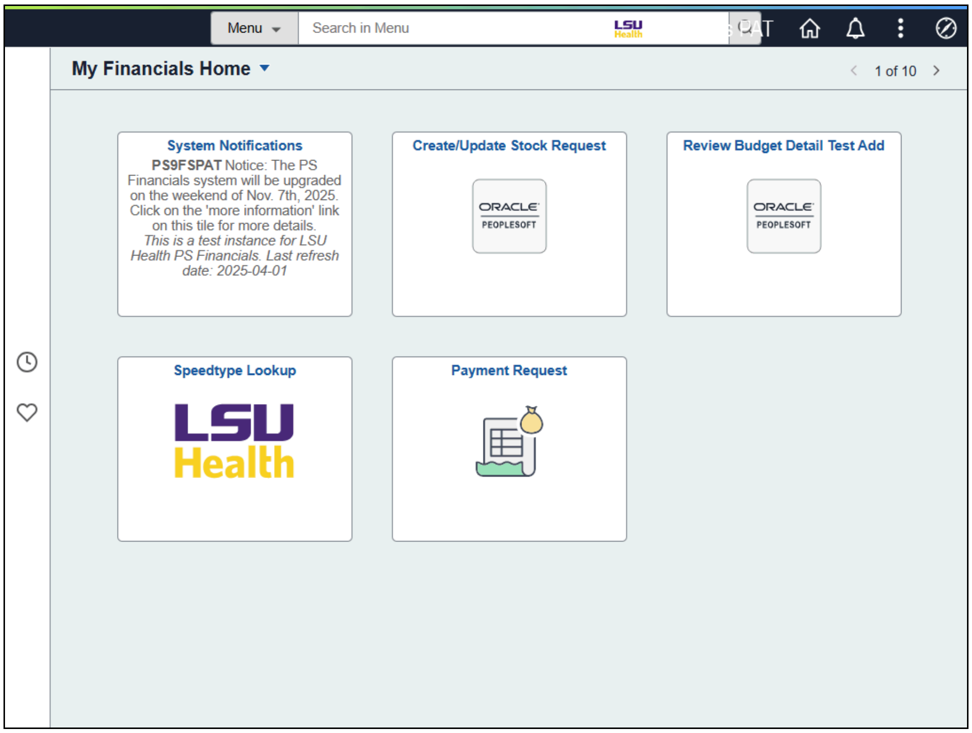
Internal Transaction Requests - LSUNO

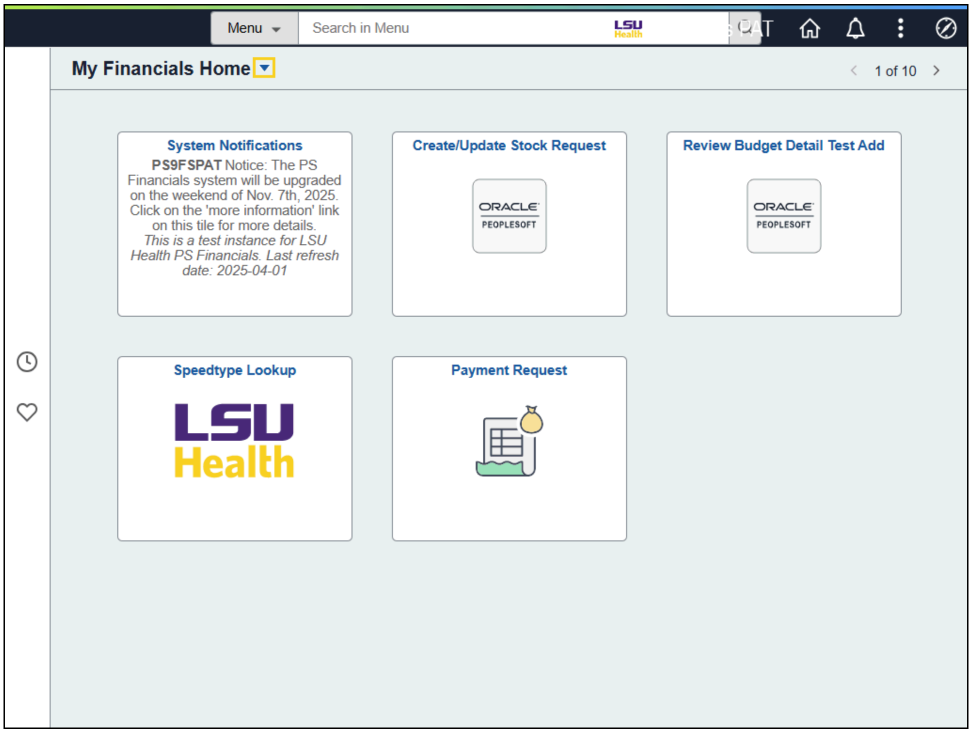
Add InternalTr eForm

Procedure

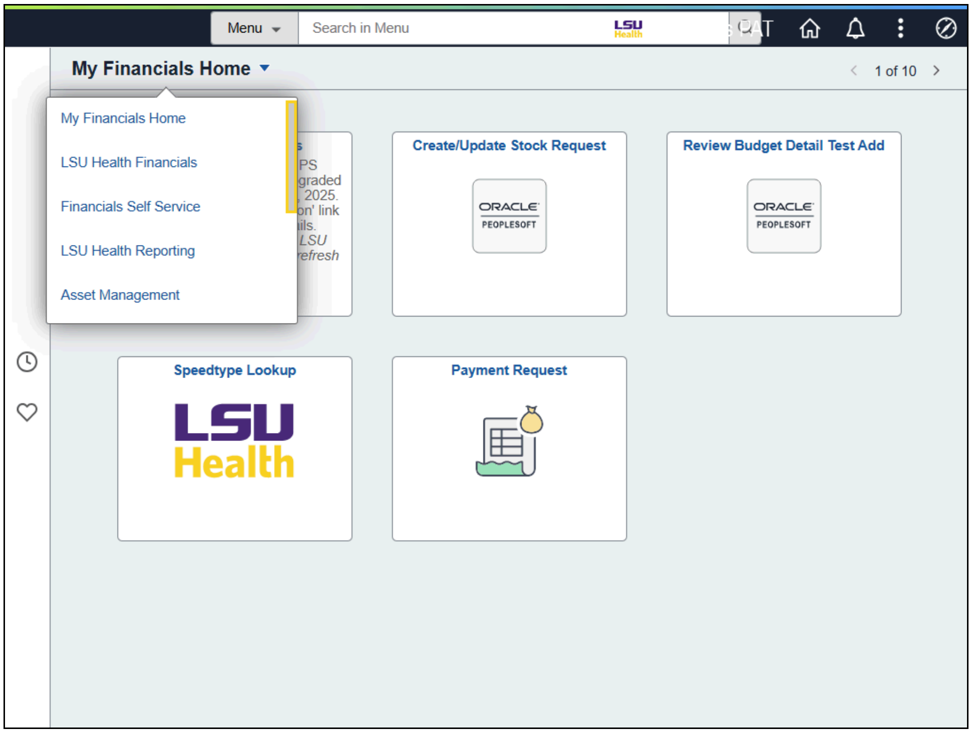
In this topic you will learn how to **Add an InternalTr eForm**.



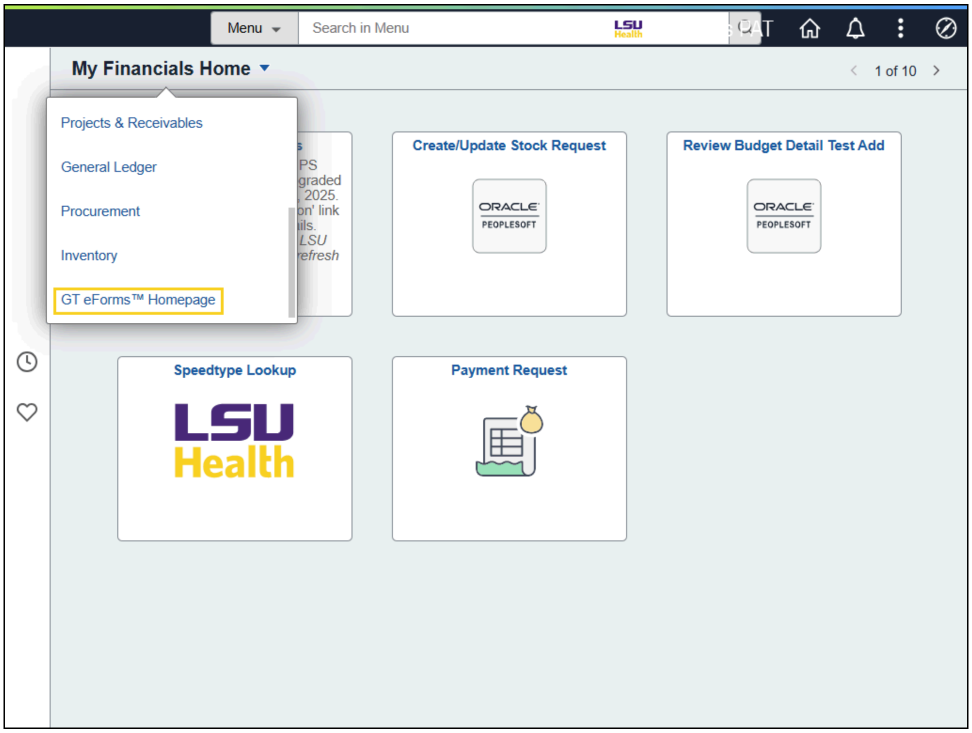
Step	Action
1.	**Internal Transactions eForms** Users will complete Internal Transaction eForms (ITs) for two purposes: **1.** ITs are used to charge an internal department for services/products provided by a cost center; and/or **2.** ITs are used to transfer costs from one department to another. Examples for this include mail, supplies, etc.



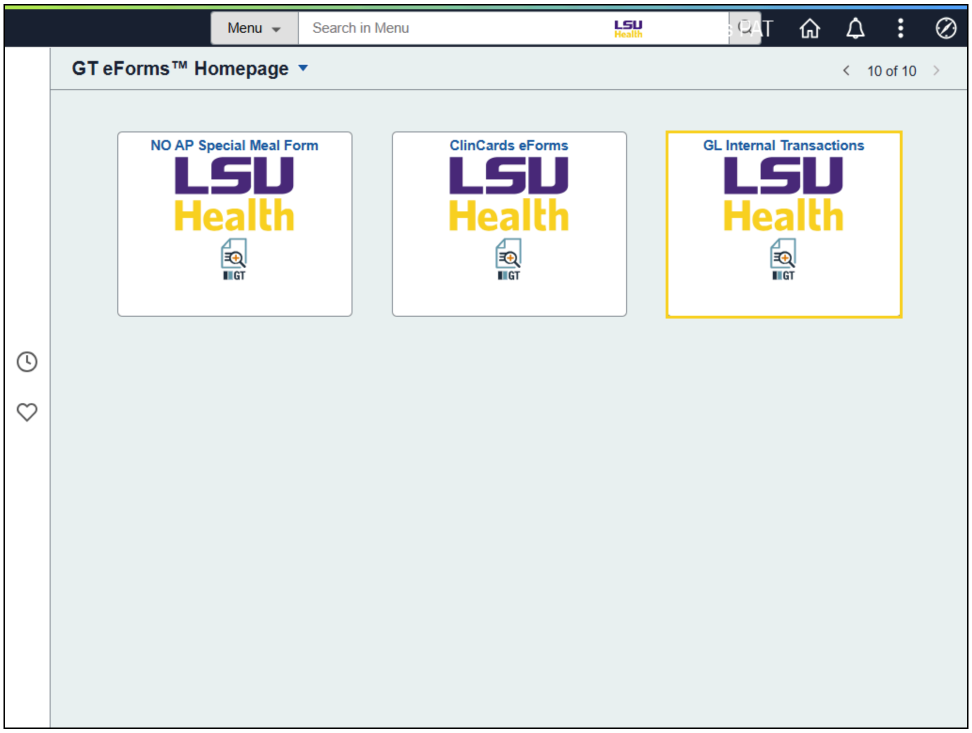
Step	Action
2.	A separate homepage contains **GT eForms**, which includes the Add an Internal Tr eForm option. Click the button to the right of the **My Financials Home** field. 



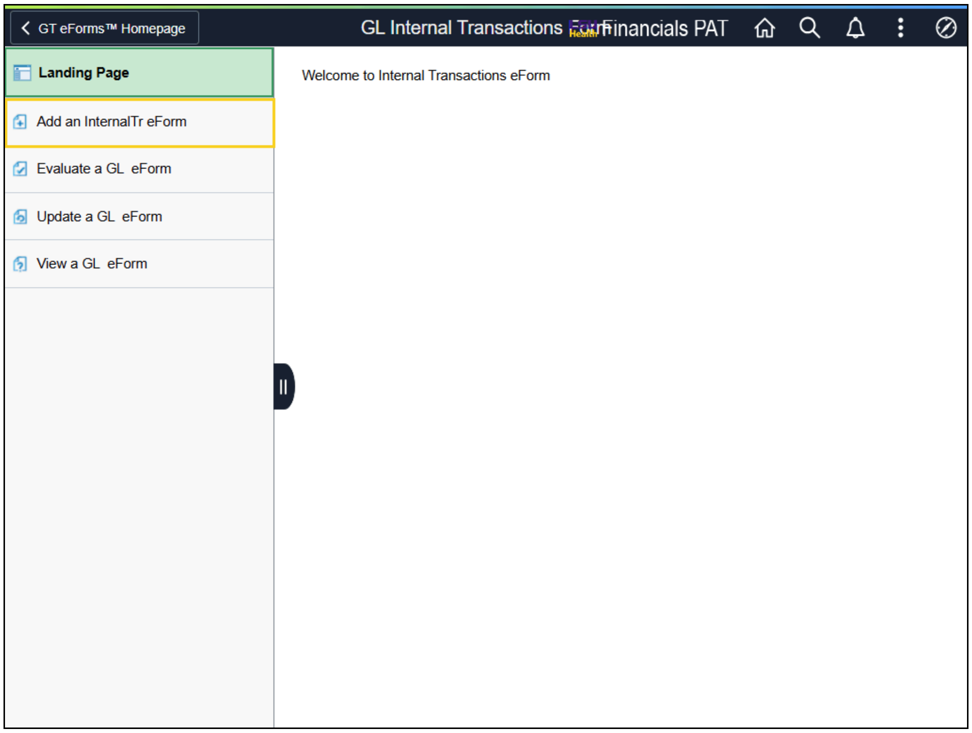
Step	Action
3.	Click the **Down** button of the scrollbar. ***NOTE: This step serves as an example for scrolling up and down the menu. Users may also scroll left/right using the scroll buttons at the bottom of the page. No other scrolling steps will be included in this topic.***

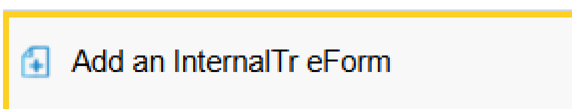


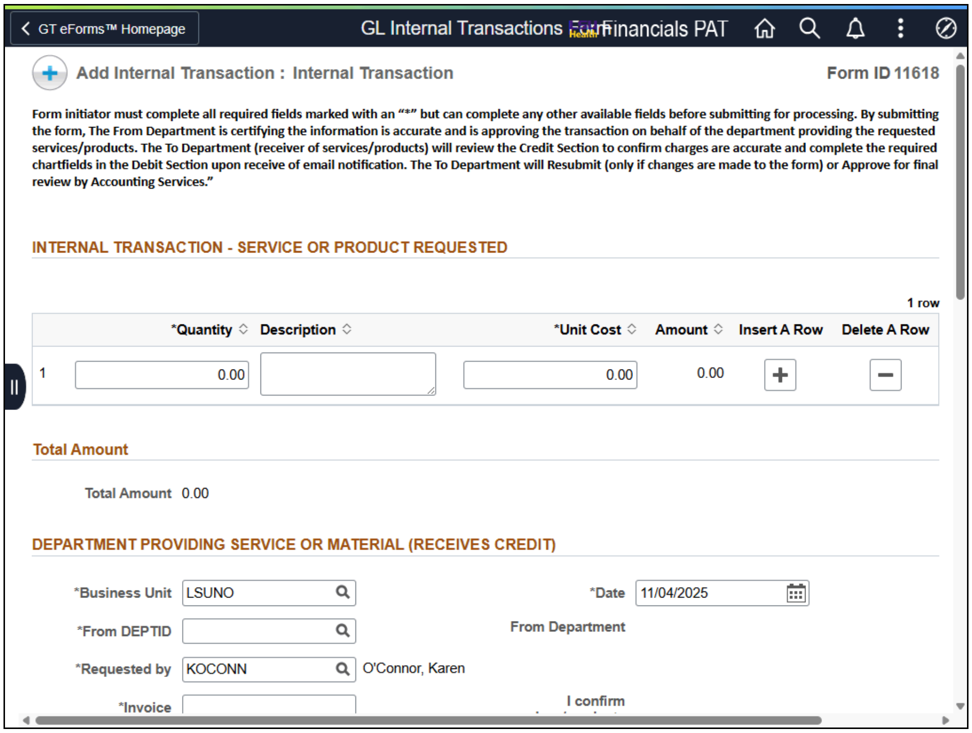
Step	Action
4.	Click the **GT eForms Homepage** link. GT eForms™ Homepage



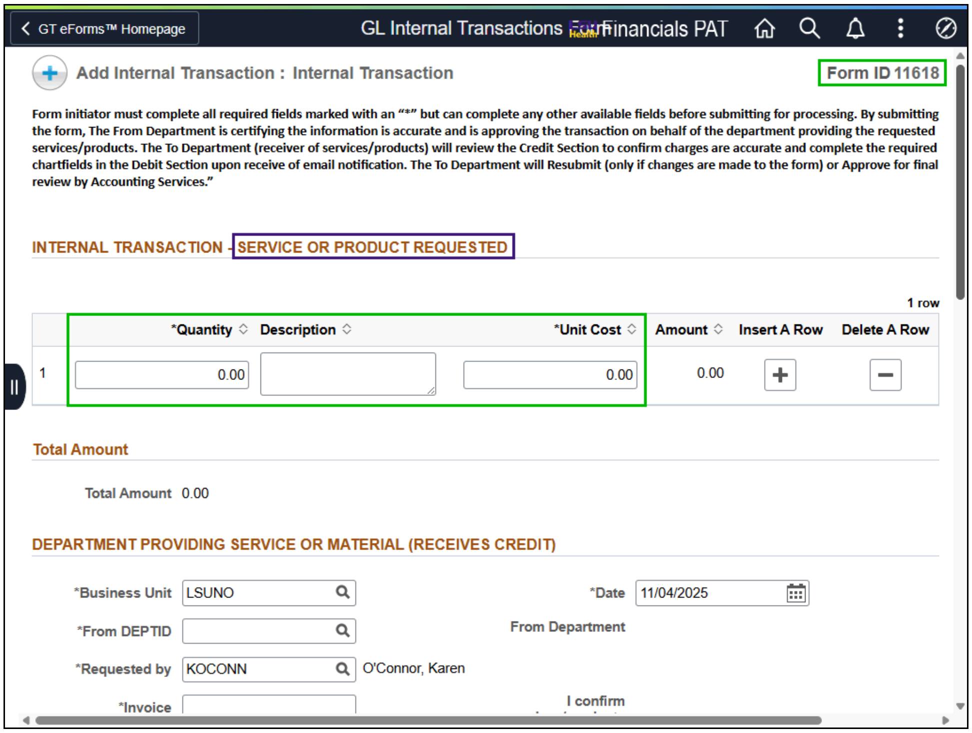
Step	Action
5.	Click the **GL Internal Transactions** tile.



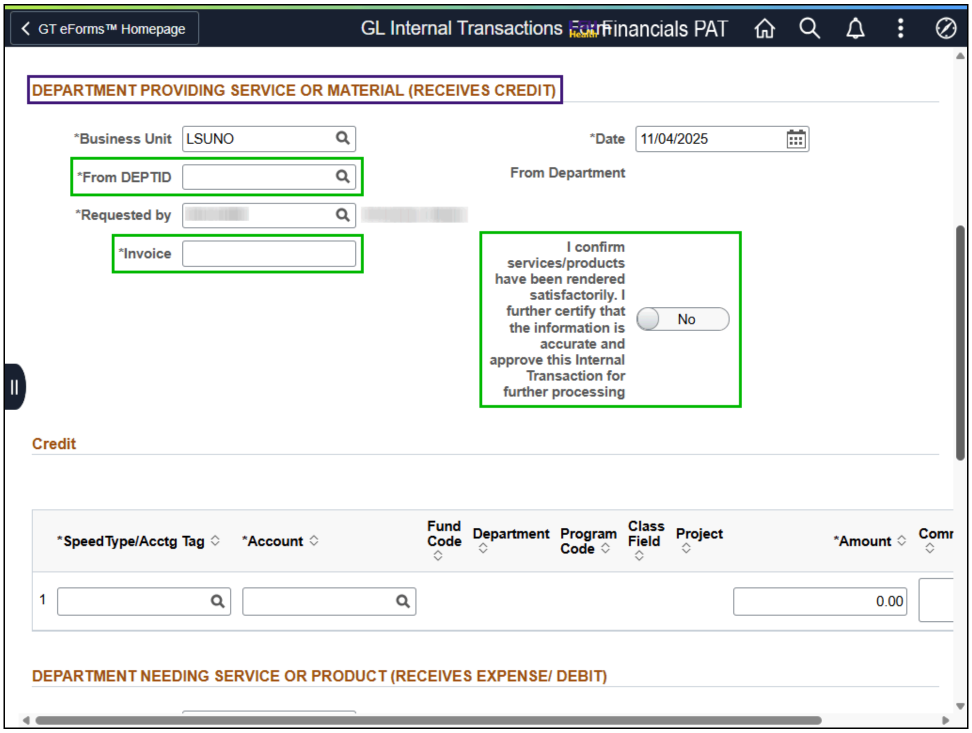
Step	Action
6.	Click in the **Add an InternalTr eForm** field. 



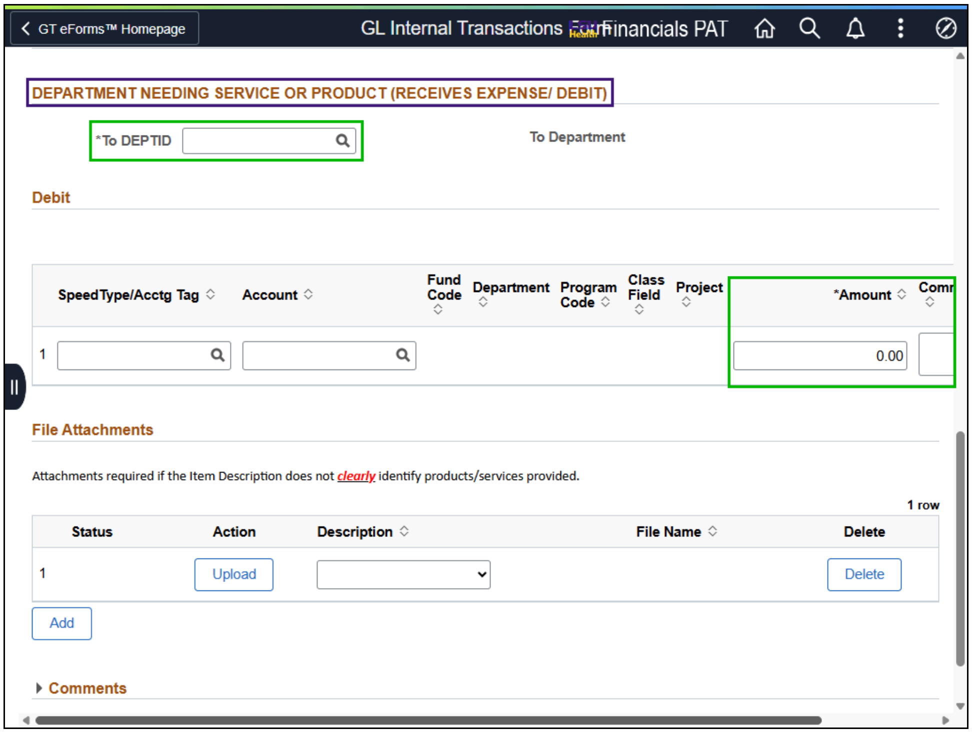
Step	Action
7.	**Add Internal Transaction: Internal Transaction Form** The **Internal Transaction eForm** is divided into three (**3**) sections: **1.** Service and Product Requested **2.** Department Providing Service or Material (Receives Credit) **3.** Department Needing Service or Product (Receives Expense-Debit)



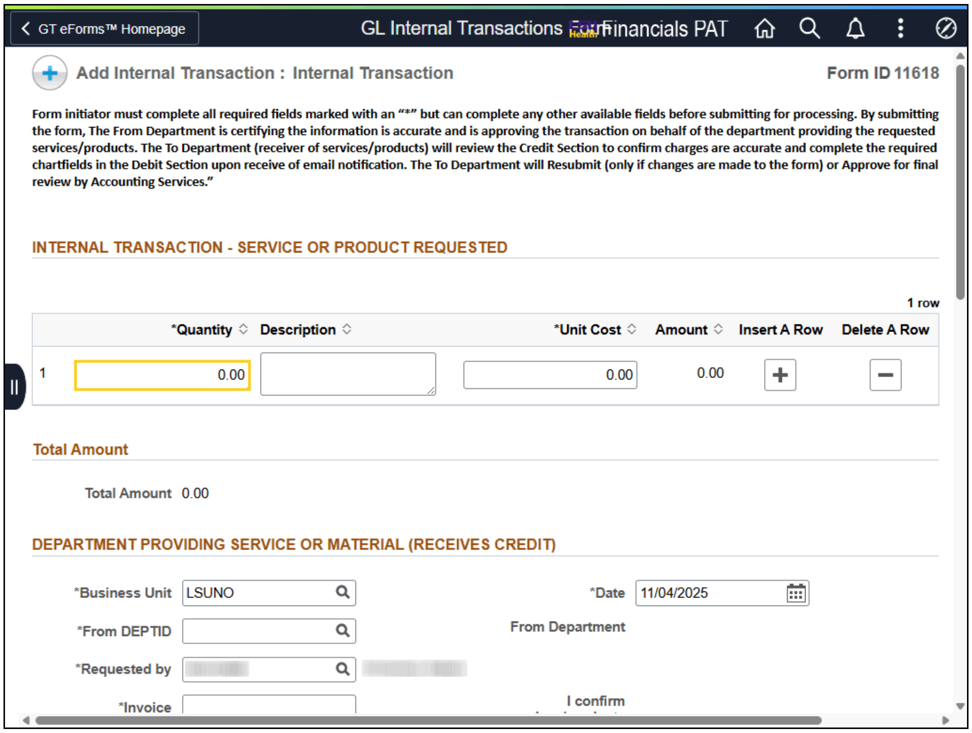
Step	Action
8.	**Service or Product Requested** This section details the *quantity*, *the description,* and *the cost per item* of the product or service. ***NOTE: The Form ID at the top right of the page is the Internal Transaction Form ID assigned by the system.***



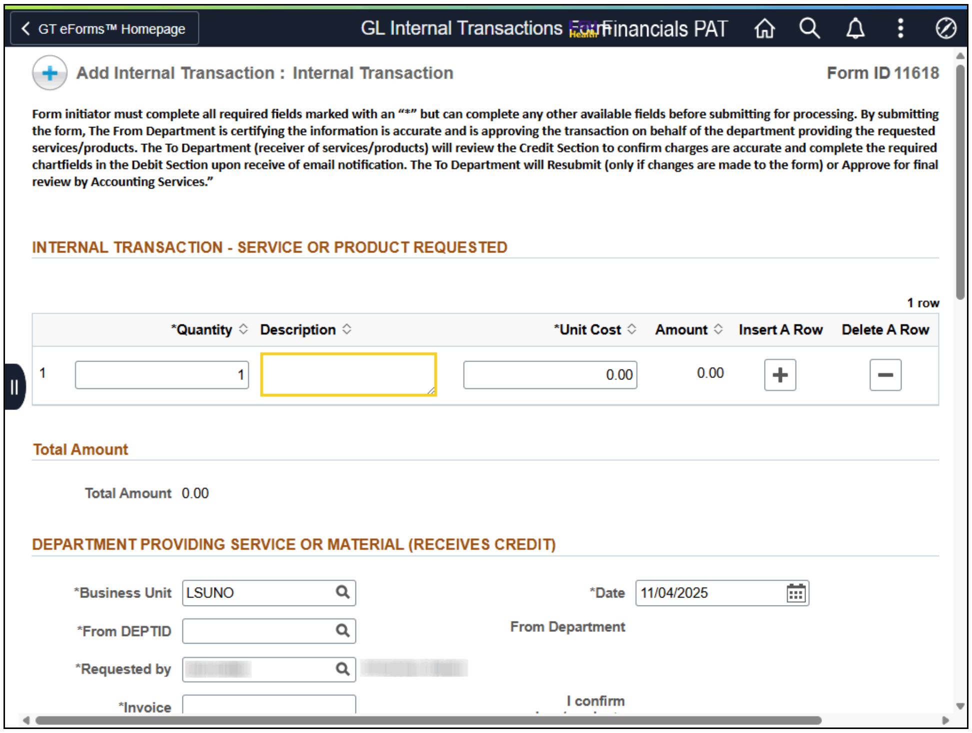
Step	Action
9.	**Department Providing Service or Material (Receives Credit)** The section is completed by the Initiator of the form. It details the *department ID*, the *departmental invoice number*, a *certification slide box*, the *SpeedType* and *Account* to charge the expense, the *amount*, and *additional comments*.



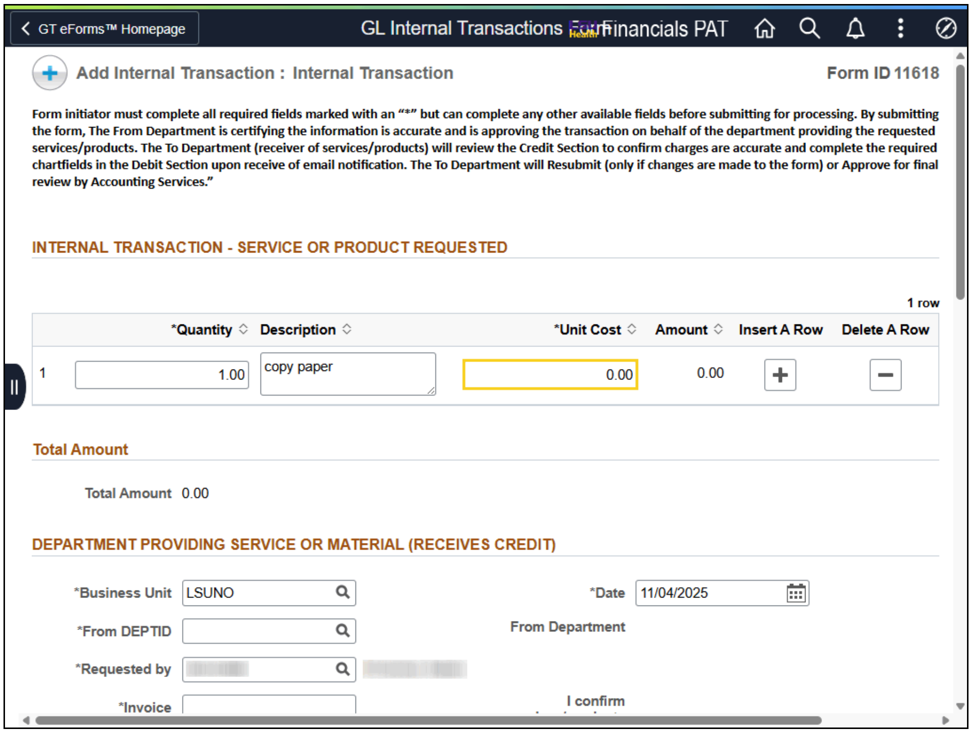
Step	Action
10.	***Department Needing Service or Product (Receives Expense - Debit)*** This section requires the *Initiator* to complete the ***To DEPTID** and the **Debit Account** field. The remaining fields will be completed by the department receiving the product or service and includes the SpeedType and account to charge the expense, the amount, and additional comments.



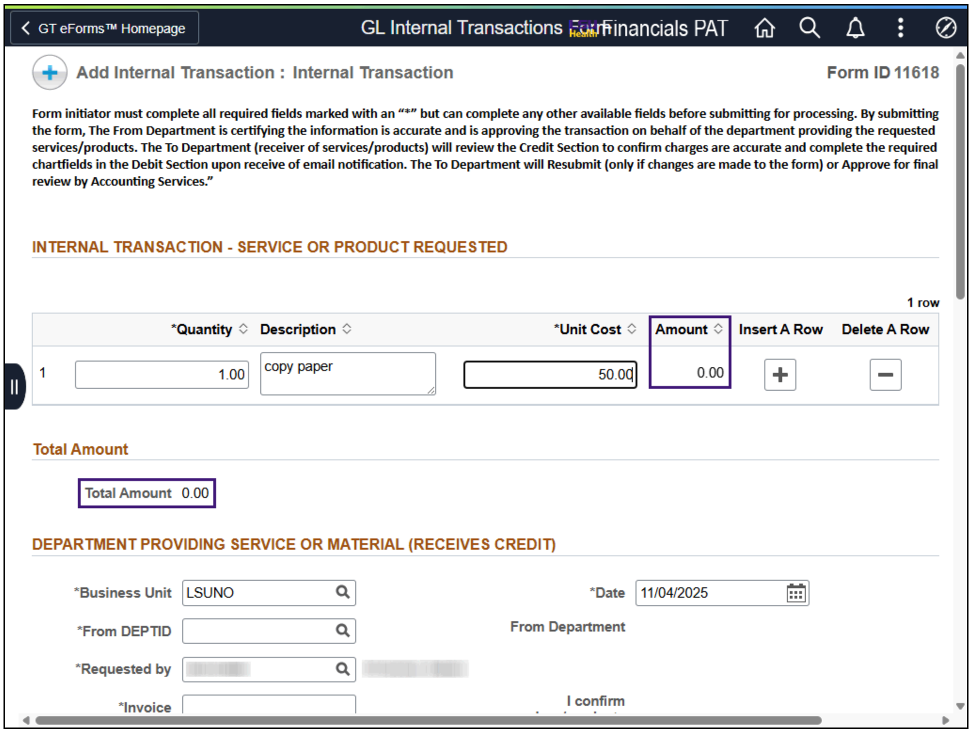
Step	Action
11.	**Service or Product Requested** ***NOTE: The Initiator of the IT Form is required to complete every field marked with an "*."*** Enter the desired information into the field. Enter "**1**".



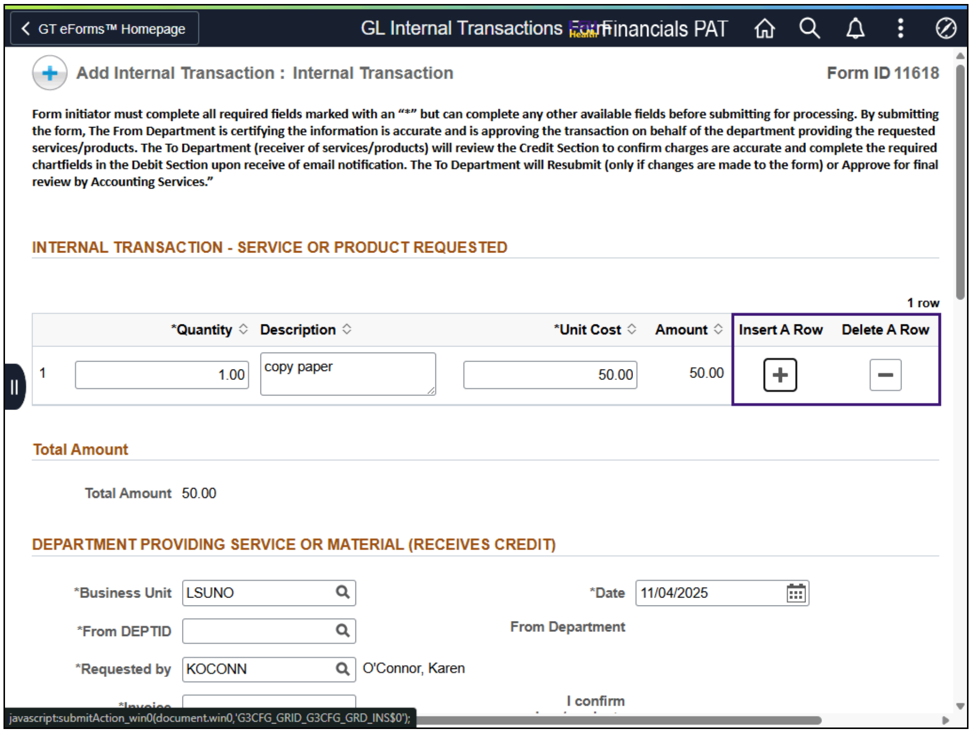
Step	Action
12.	A user can enter up to 30 characters in the **Description** field. This field will be the general ledger journal description for reporting. Enter the desired information into the field. Enter "**copy paper**".



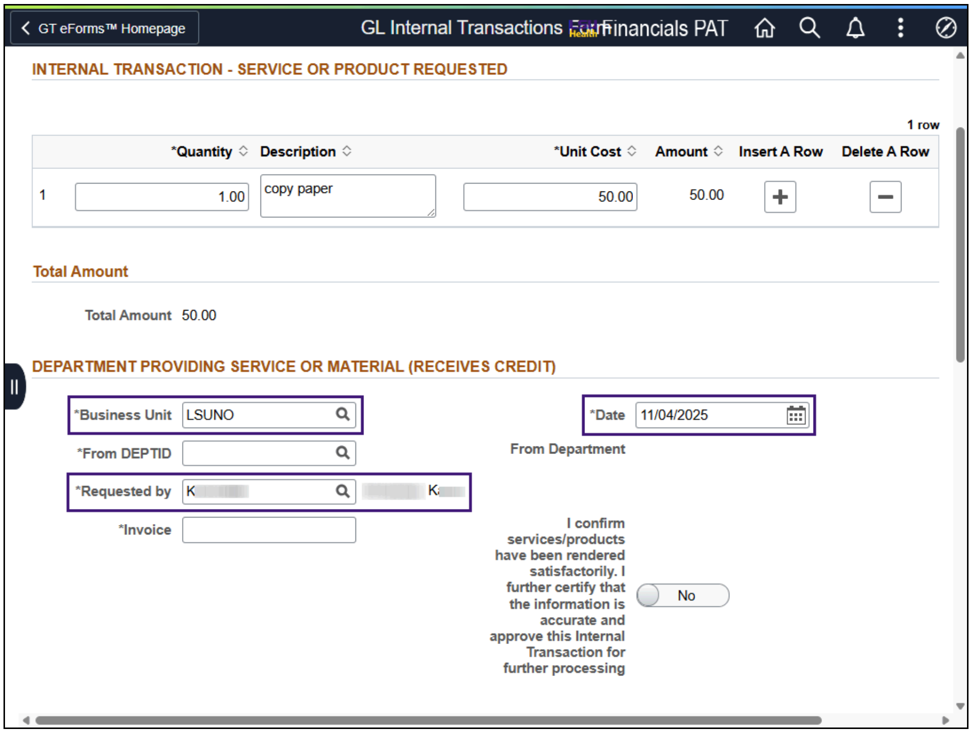
Step	Action
13.	Enter the desired information into the ***Unit Cost** field. Enter "**50.00**".



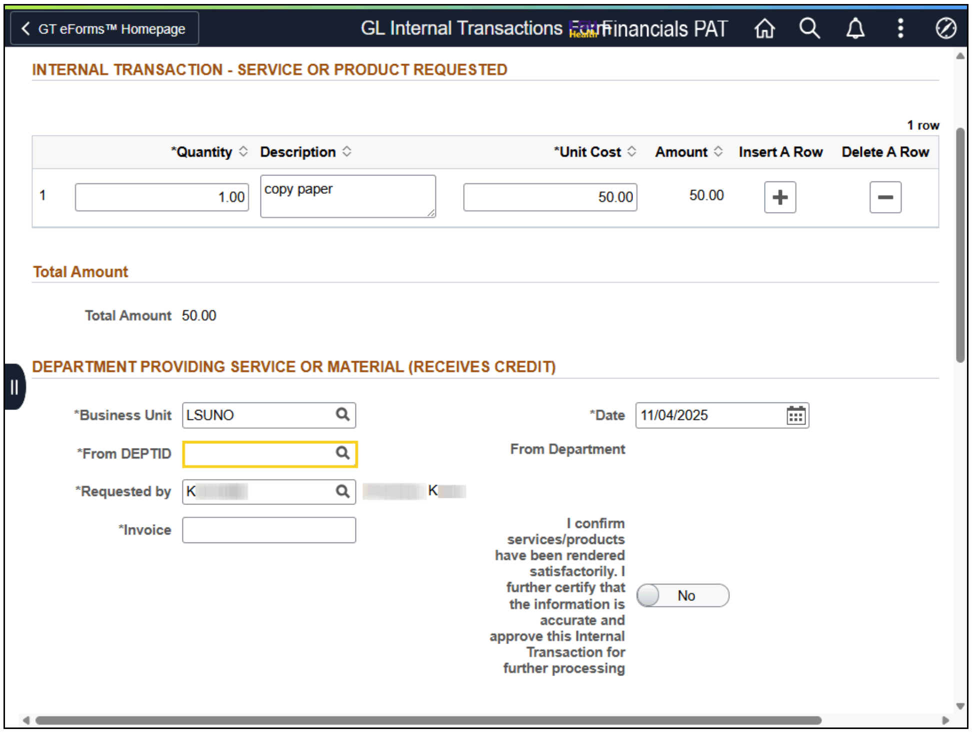
Step	Action
14.	When the ******Unit Cost* is entered, the **Amount** and **Total Amount** will automatically calculate after pressing the **Tab** key. Press **[Tab]**.



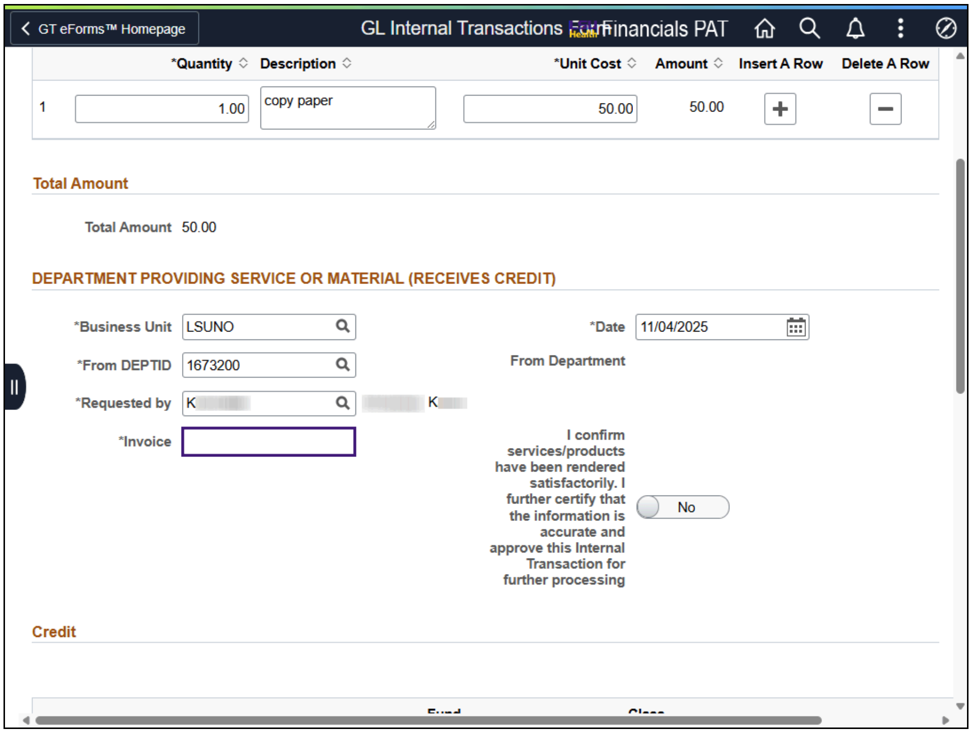
Step	Action
15.	If more rows are needed, select the "+" to add a row. The "-" will delete a row.



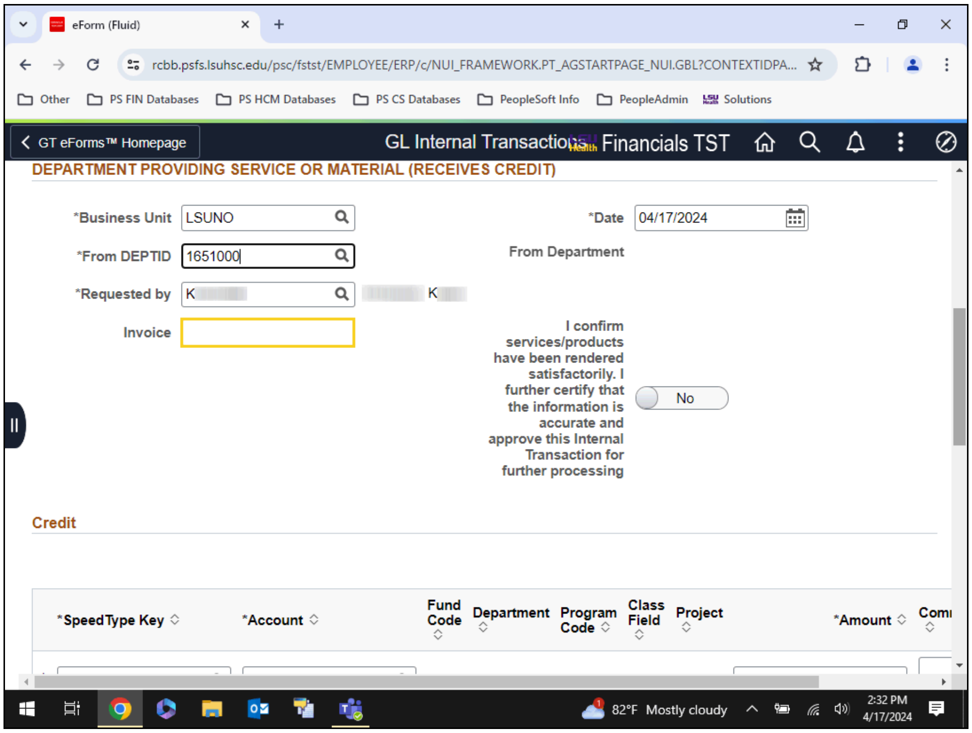
Step	Action
16.	**Department Providing Service or Material (Receives Credit)** Confirm the ***Business Unit** is LSUNO. The ***Date** defaults to the current date and can be changed if needed. The ***Requested by** field will default with the current user's ID and name.



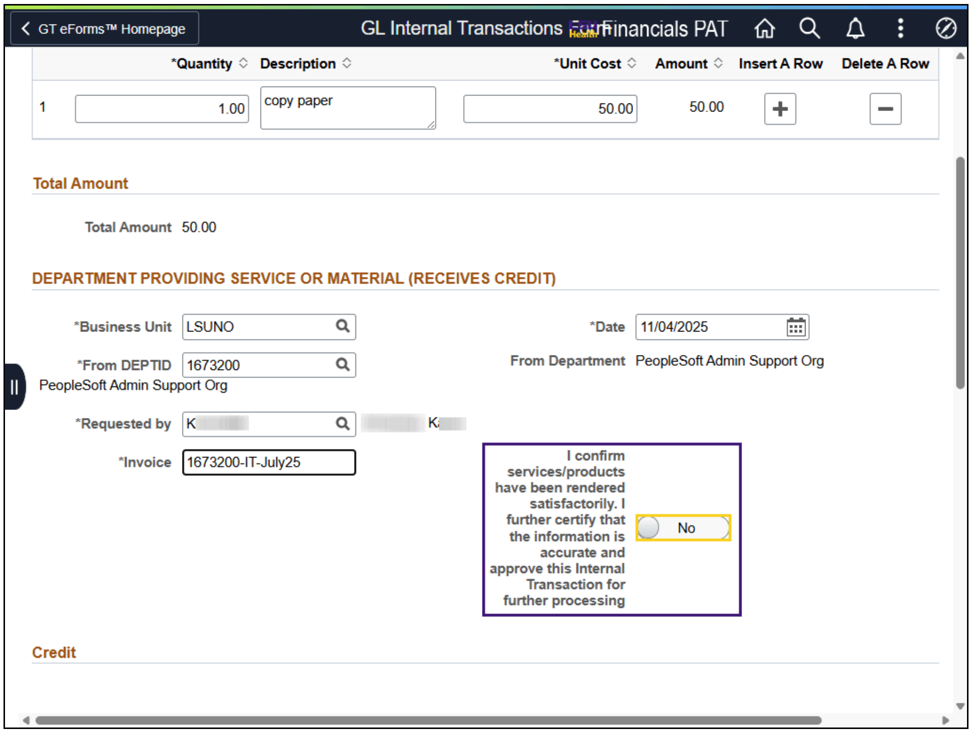
Step	Action
17.	The ***From DEPTID** is the department that will receive the credit for products or services rendered. Enter the desired information into the ***From DEPTID** field. Enter "**1673200**".

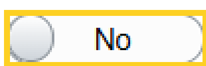


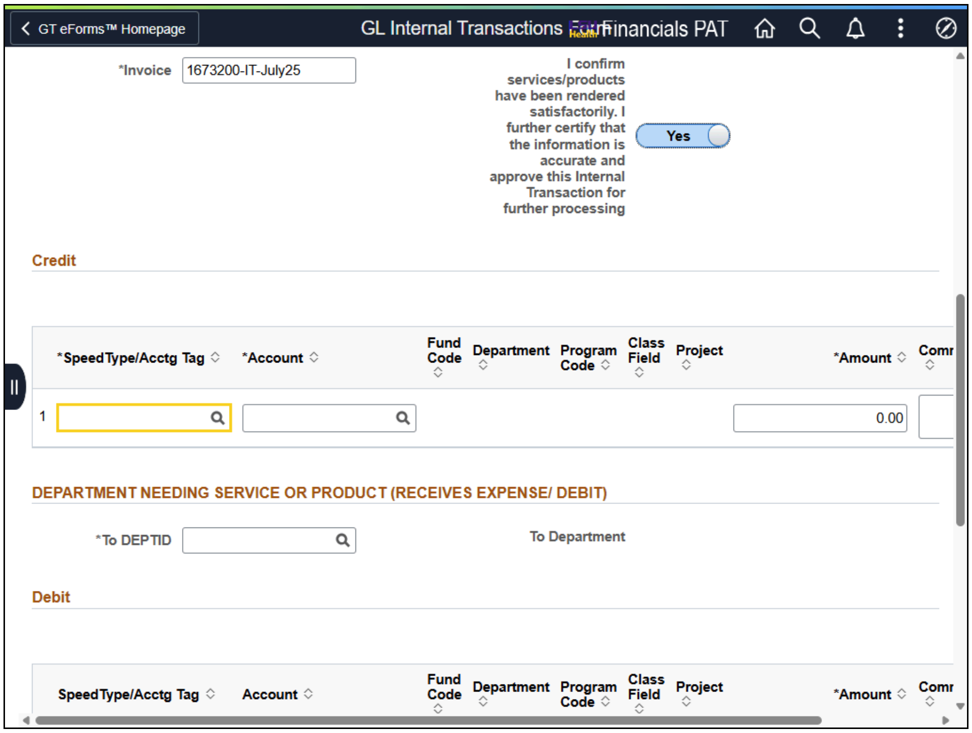
Step	Action
18.	The **Invoice** number is the department invoice number. It can be up to 30 characters long. The **Invoice** number will be the general ledger journal description. ***NOTE: General Accounting's recommended practice is to begin with the department's Invoice number and then add any additional language needed to be seen in the general ledger. Examples would include IRB Fee, Morphology Core, CME, Mailroom, etc***



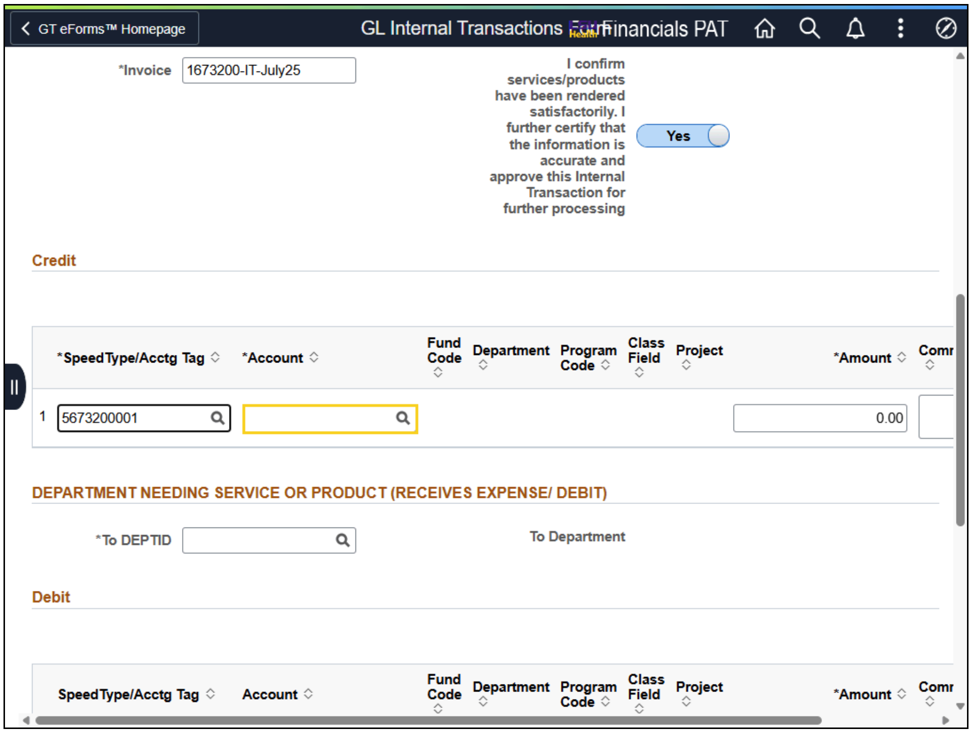
Step	Action
19.	The **Invoice** number is the department invoice number. It can be up to 30 characters long. Enter the desired information into the **Invoice** field. Enter "**1673200-IT-July25**".



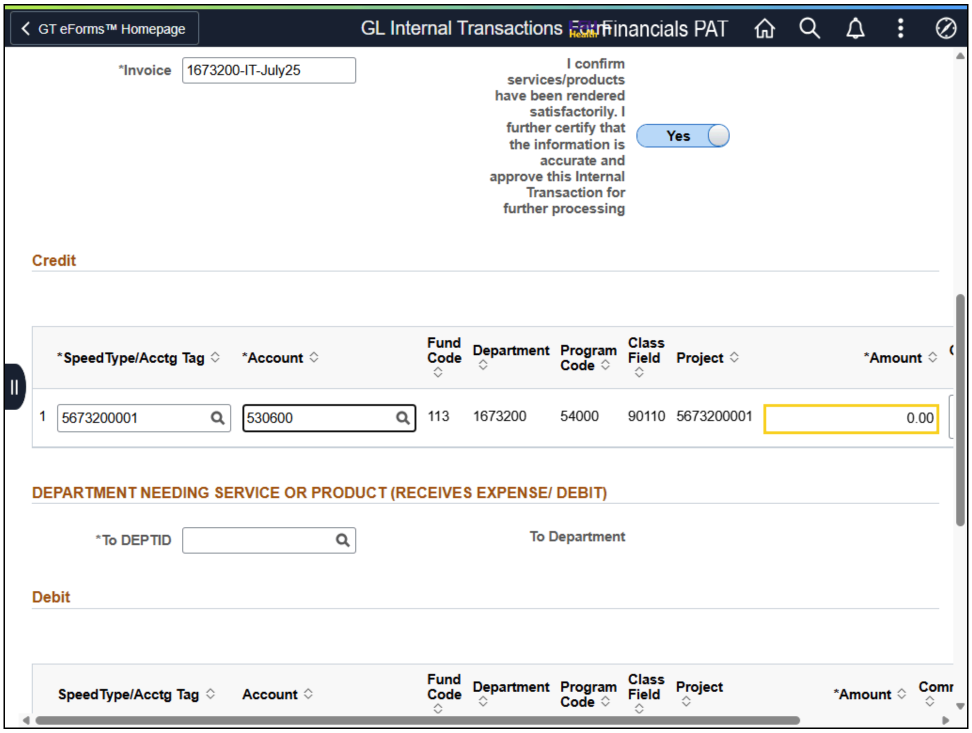
Step	Action
20.	The certification statement requires confirmation. Read the statement. To confirm, click on the button to change the response to "**Yes**." ***NOTE: Users may only submit the IT after the user slides the confirm button in the top of the form from "No" to "Yes".*** Click the **Confirmation** option. 



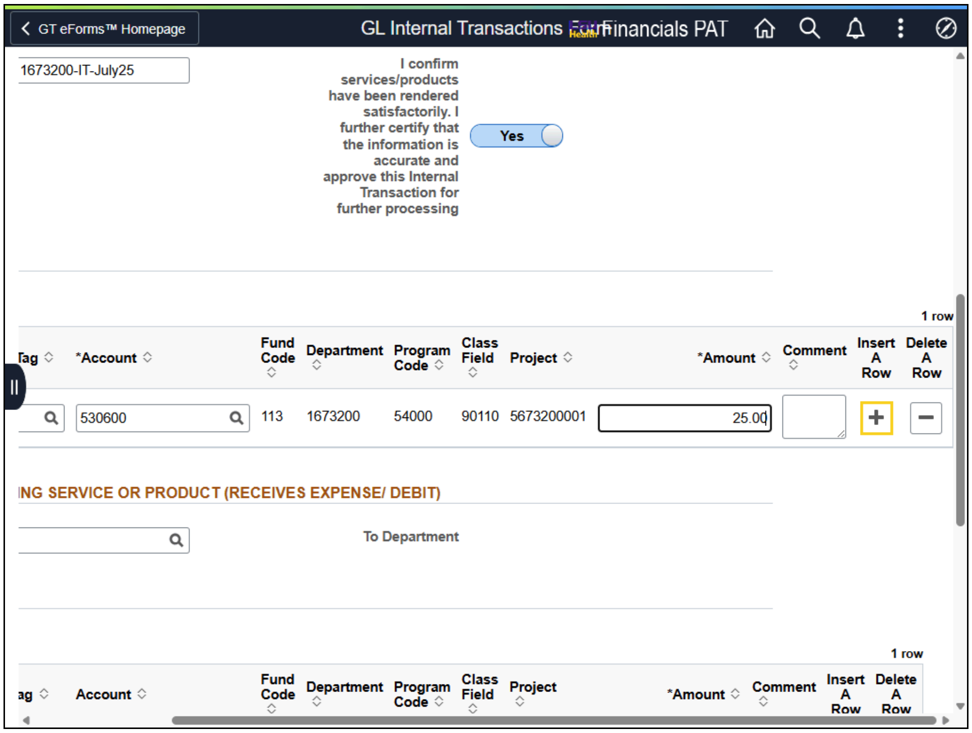
Step	Action
21.	Enter the **SpeedType** and **Account** for the *department receiving* the credit. Enter the desired information into the field. Enter "**5673200001**".



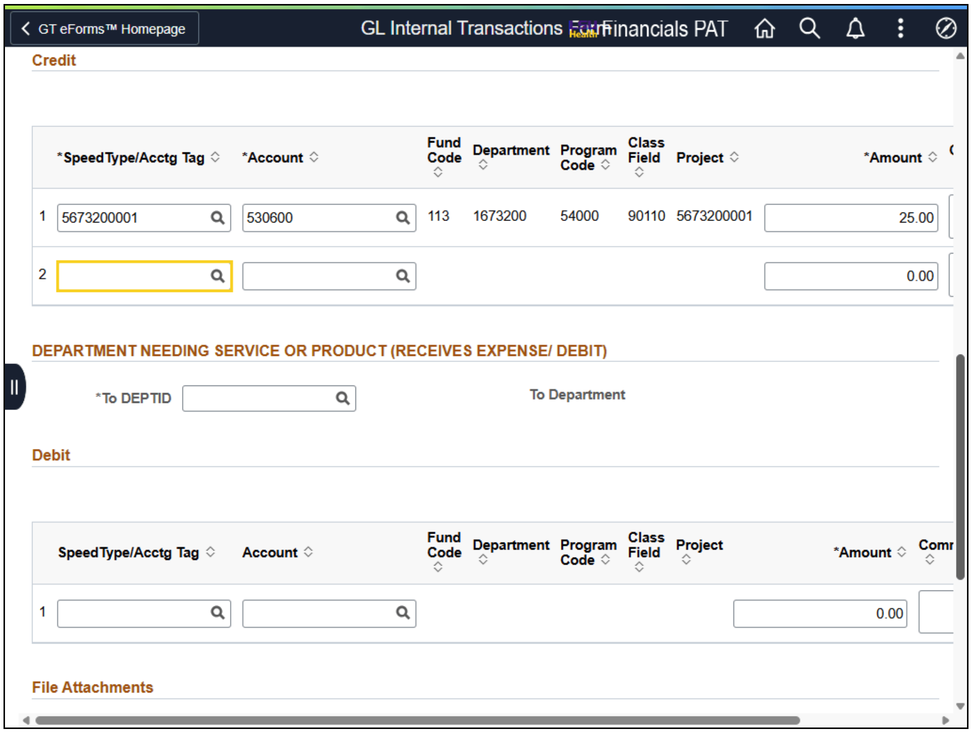
Step	Action
22.	***General Accounting NOTE: In most cases, the account number will be 530600. Consult General Accounting if you have any questions.*** Enter the desired information into the field. Enter "**530600**".



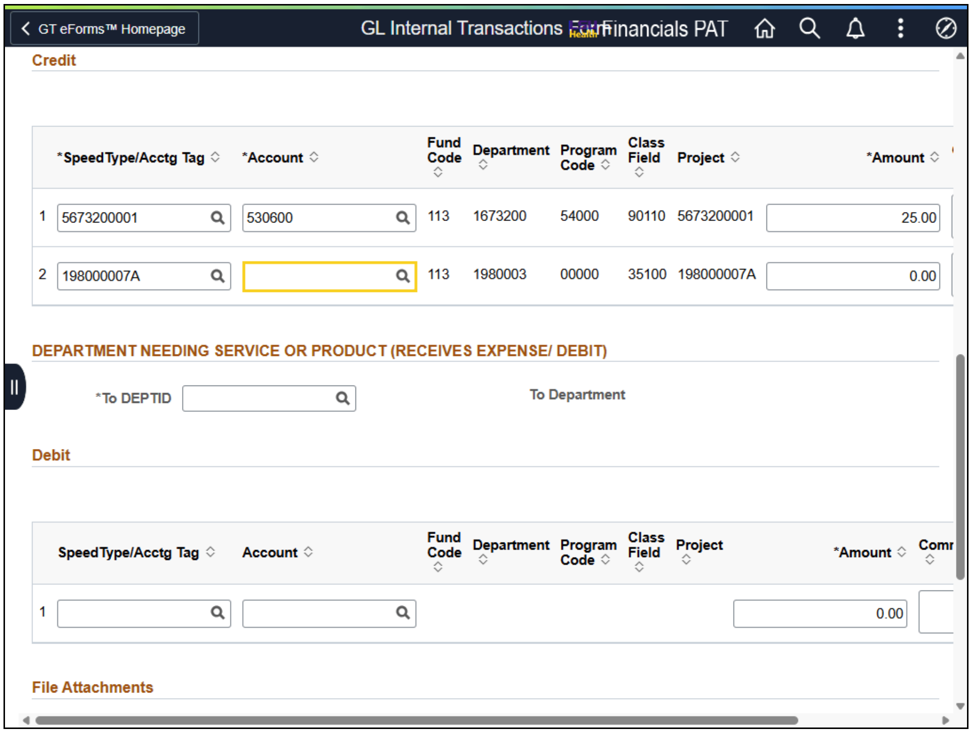
Step	Action
23.	Enter the total amount from the **Service or Product Request** area if using a **single** SpeedType Key. For this example, two SpeedType Keys will be used, so an additional line will be inserted. The second SpeedType Key, account and the remaining amount will be entered on Line 2. *Comments* are not required. Enter the desired information into the **Amount** field. Enter "**25.00**".



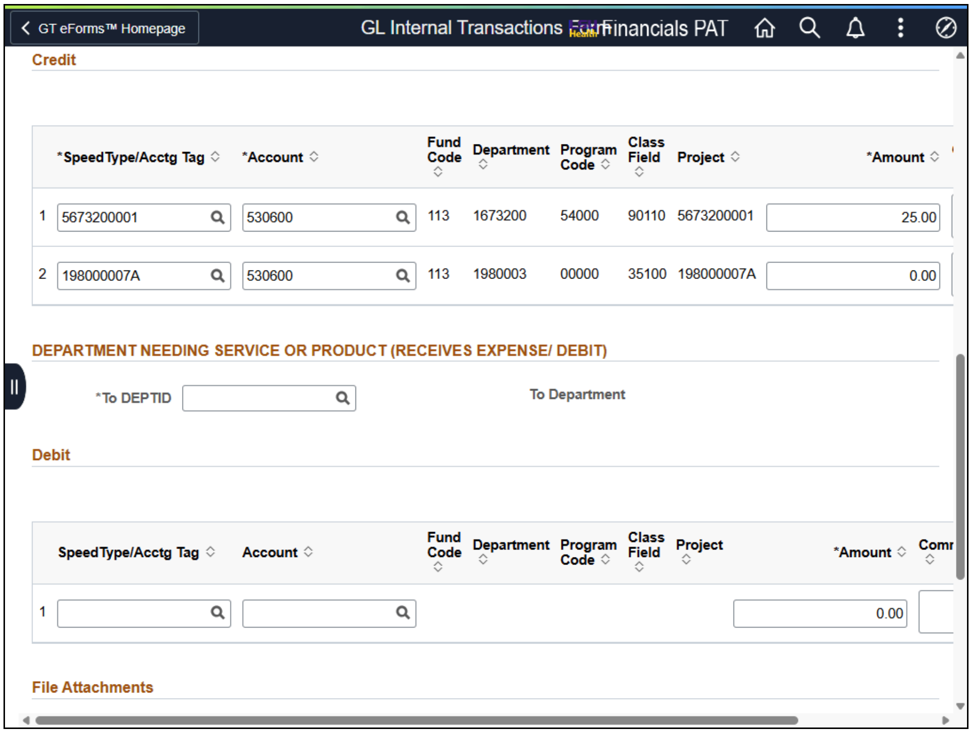
Step	Action
24.	Click the **Add a New Row** button. 



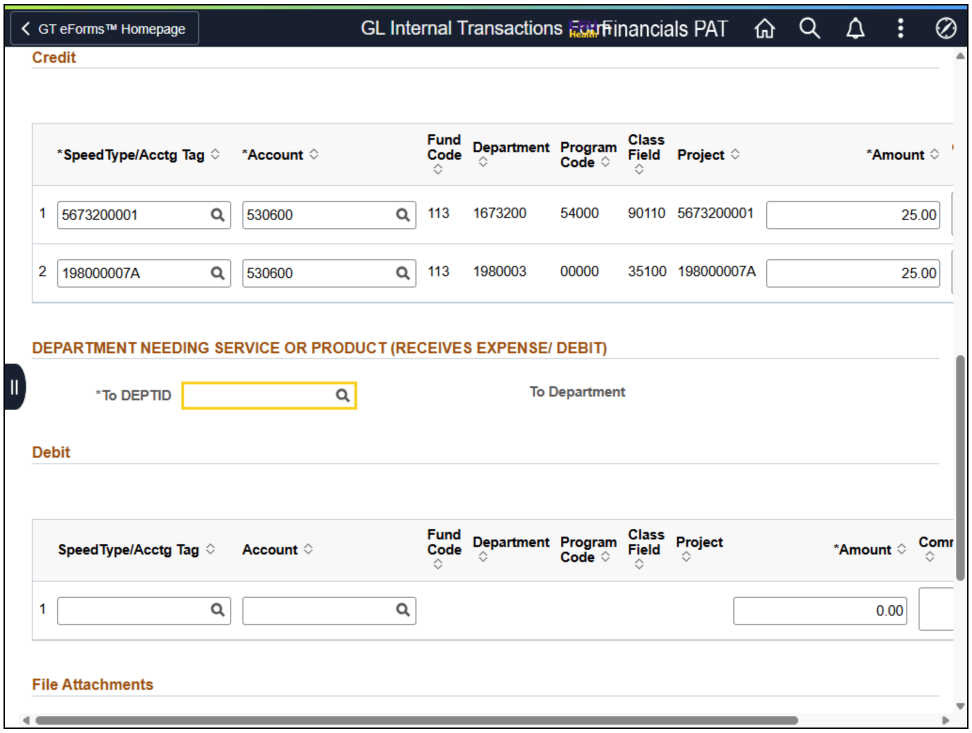
Step	Action
25.	Enter the desired information into the **Line 2 SpeedType Key** field. Enter "**198000007A**". ***NOTE: Press the tab key to populate the chartfields of the speedtype.***



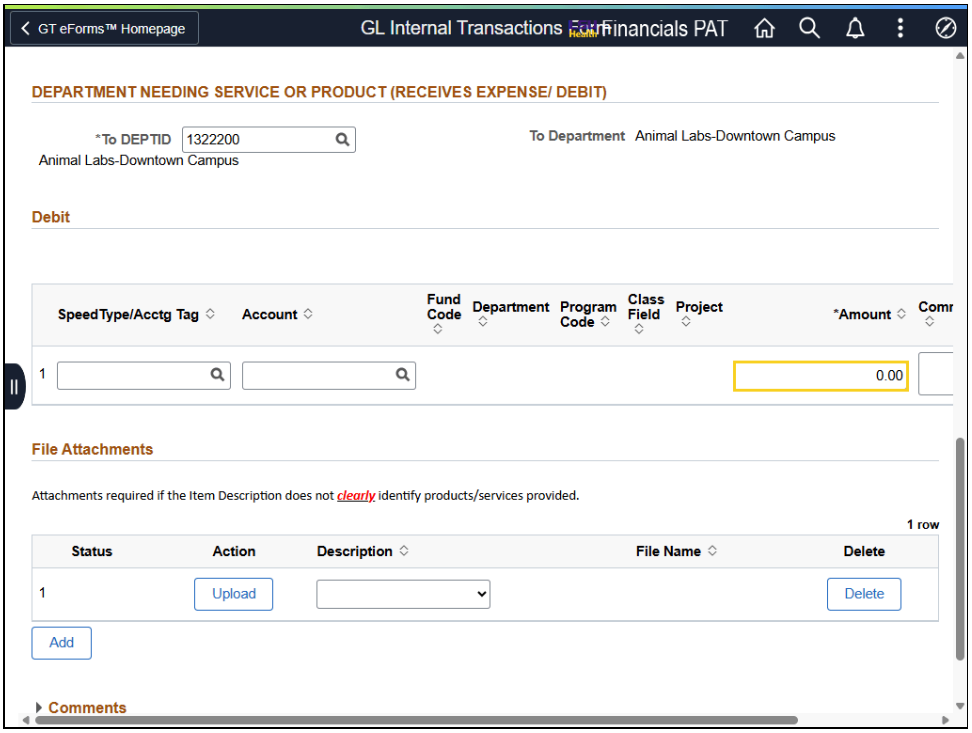
Step	Action
26.	Enter the desired information into the **Account** field. Enter "**530600**".



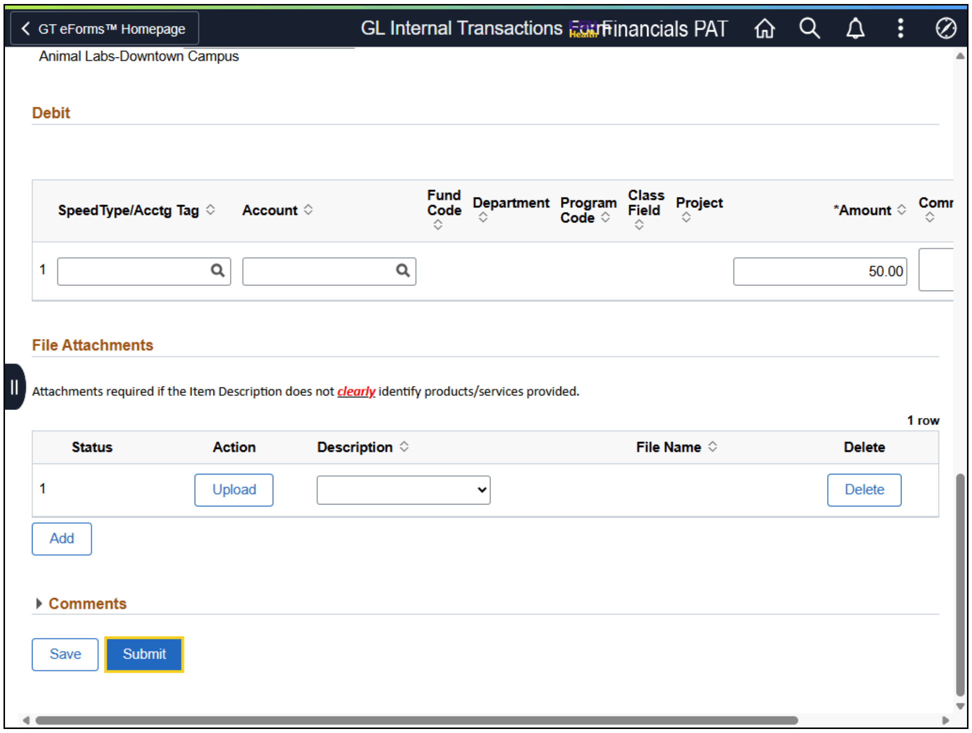
Step	Action
27.	Enter the desired information into the **Amount** field. Enter "**25.00**". ***NOTE: The Amount for Line 1 and Line 2, when added together, should equal the Total Amount from the Service or Product Request area.***



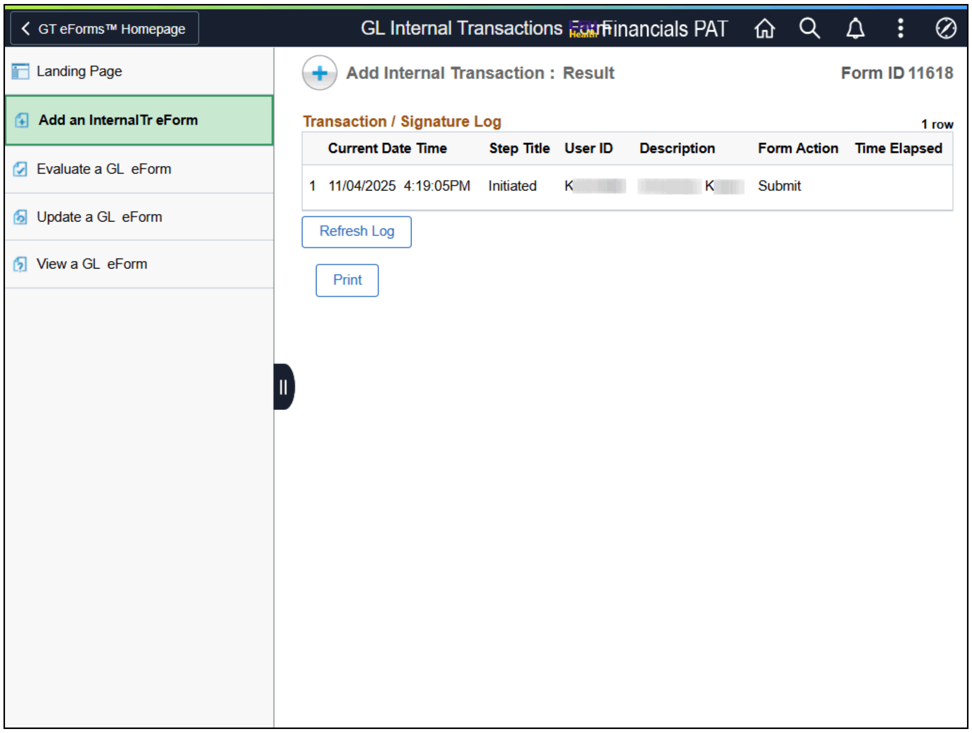
Step	Action
28.	The DeptID for the department receiving the product or service will be entered in the *To DEPTID. Enter the desired information into the ***To DEPTID** field. Enter "**1322200**".



Step	Action
29.	Enter the **Total Amount** that will be charged to the receiving department. The Initiator may continue to enter the SpeedType and Account number for the department receiving the products or services. However, this is not required. Enter the desired information into the **Amount** field. Enter "**50.00**".
30.	***NOTE: The File Attachment Section appears below the Debit section. Attachments are RECOMMENDED but not required. Attachments will benefit both departments as well as Accounting Services as the attachments remain with the documentation in PeopleSoft and paper copies will not be required. Select the Upload button to choose and attach the department's invoice. Multiple attachments may be added by selecting the Add button below the Attachment grid section. If the user chooses to remove an attachment, the user will select the Replace button that appears on the right side of the attachment row. It is only active once an attachment has been added.***
31.	The form is completed by the credit department and must be sent to the department for additional information before processing.



Step	Action
32.	Click the **Submit** button. 



Step	Action
33.	The **Transaction / Signature Log** displays showing the form has been submitted and the process initiated.
34.	This completes ***Add an InternalTr eForm***. **End of Procedure.**