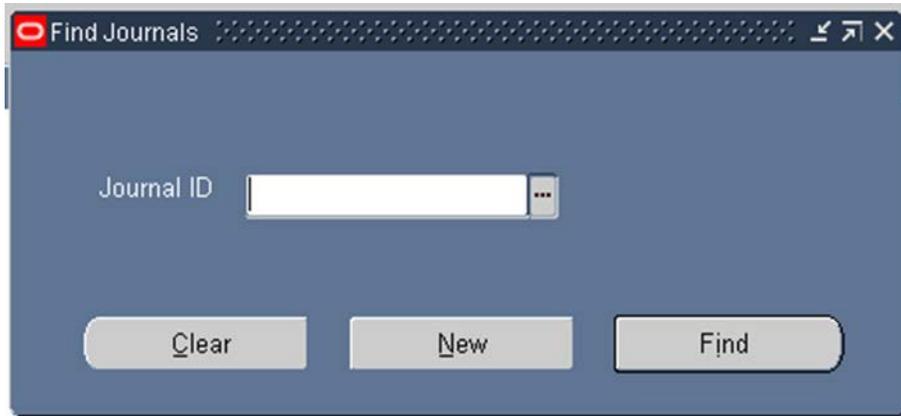

INTERDEPARTMENTAL ORDER

Interdepartmental Order

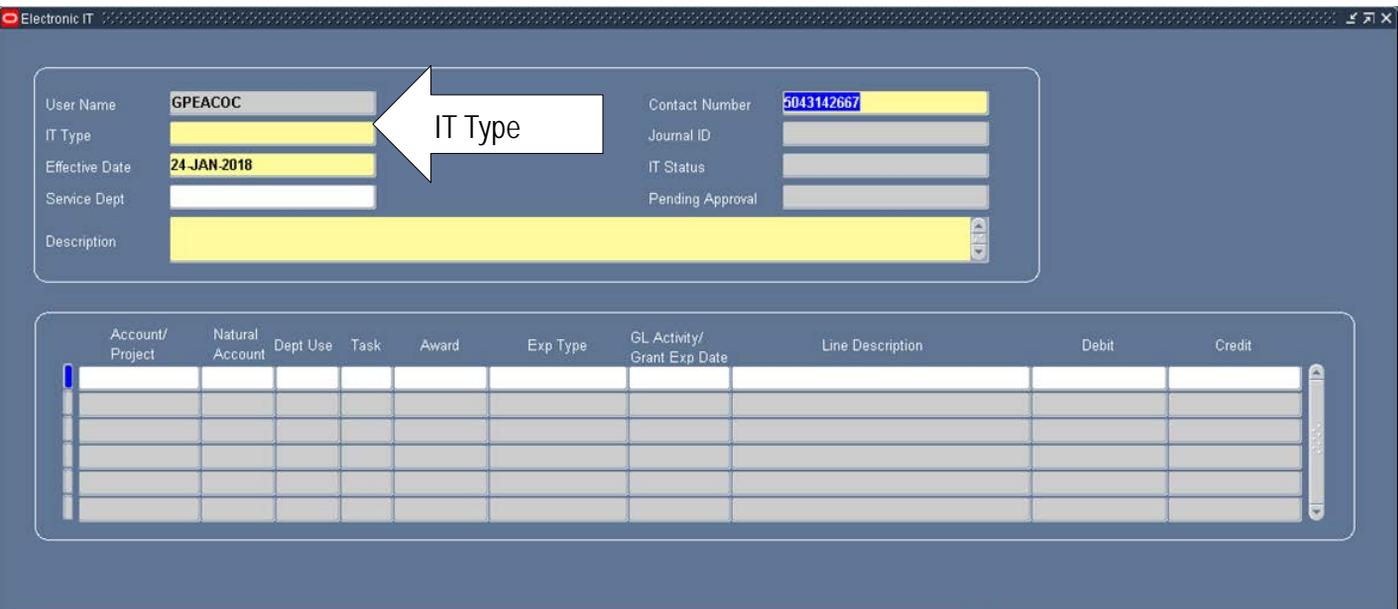
- Interdepartmental Order Forms are used for services or goods obtained within Tulane University. Some examples are:
 - Public Safety
 - Athletics
 - Tech Connect
 - Lab Services
 - Facilities
- The natural accounts for these forms should be the Recharge/Cost Recovery Natural Account numbers. The natural account to charge for the goods or service should start with 88XX.
- The Debit (or account being charged) should be the only account that is listed on the form created by the initiator.
- Once the form is submitted and approved, it will go to the Service Department where they will input the Credit account.
- Dollar amounts do not have to be input on this form.
- ***If a grant is to be charged on this form, **PLEASE LIST THE END DATE OF THE GRANT IN THE REFERENCE SECTION TO MAKE SURE THE SERVICE DEPARTMENT IS AWARE.*****

Interdepartmental Order

When opening the Electronic IT form, the Find Journals box will appear.



Click on the button labelled "New".



Account/ Project	Natural Account	Dept Use	Task	Award	Exp Type	GL Activity/ Grant Exp Date	Line Description	Debit	Credit

The form will automatically populate with the Initiator's name and telephone number.

All fields that are in yellow are required fields that will not allow the User to continue until those fields are filled in.

Click in the field "IT Type".

Interdepartmental Order

The image shows a screenshot of the 'Electronic IT' system interface. On the left, there is a form with the following fields: 'User Name' (GPEACOC), 'IT Type' (a dropdown menu), 'Effective Date' (24-JAN-2018), 'Service Dept' (empty), and 'Description' (empty). A callout box labeled 'List of Values' points to the 'IT Type' dropdown. On the right, a 'Journal Type' dialog box is open, showing a search field 'Find %' and a list of options: 'E IT Type', 'Departmental Correction' (highlighted), 'Transfer of Funds', and 'Interdepartmental Order'. The dialog box has 'Find', 'OK', and 'Cancel' buttons at the bottom.

- Click on the "List of Values" to pick one of the different Journal types.
- You could select Interdepartmental Order (Services), Departmental Correction or Transfer of Funds.
- **SHORTCUT:** You can type the first letter of the Journal Type and hit the Tab key to select the Journal.
- Select Interdepartmental Order and double click or hit the OK button.

Interdepartmental Order

Electronic IT

User Name: GPEACOC

IT Type: Interdepartmental Order

Effective Date: 24-JAN-2018

Service Dept: [Field]

Description: [Field]

Contact Number: 5043142667

Journal ID: [Field]

IT Status: [Field]

Pending Approval: [Field]

Service Department

- Another field is now required – Service Dept.
- Click in the Service Department field and click on the List of Values.

Service Department

Find % Wildcard

Servicing_Department

- 11011 - PRESIDENT'S OFFICE
- 12620 - EDITORIAL AND CREATIVE SERVICES
- 12710 - TECHNOLOGY SERVICES/INFRASTRUCTURE VP
- 12740 - TELECOMMUNICATIONS-UPTOWN
- 13022 - UNIVERSITY PLANNING OFFICE
- 13071 - TELECOMMUNICATIONS-HSC
- 13141 - MATERIALS MANAGEMENT
- 13211 - FACILITIES SERVICES
- 13310 - PUBLIC SAFETY
- 13320 - TUHSC PUBLIC SAFETY
- 13472 - PARKING SERVICES
- 13474 - HOUSING - HSC DEMING
- 13520 - REAL ESTATE

Find OK Cancel

- All Departments identified as a Service Department are in the list
- To find a Department, the number can be typed in if known, or you can search by name using the wildcard – “%”.

Interdepartmental Order

The screenshot shows the 'Service Department' selection window with a search bar containing '%fac'. The list of departments includes '13211 - FACILITIES SERVICES' (highlighted), '36120 - COORDINATED INSTRUMENT FACILITY', and '44710 - TNPRC FACILITIES/MAINTENANCE'. Below this is the 'Electronic IT' form with fields for 'GPEACOC', 'Interdepartm', '30-JAN-2018', and '13211 - FACIL'. A 'Description' field is highlighted in yellow. A 'Note' popup is open over the Description field, containing the text: 'Type detailed information of your request in this field, including specific location and applicable reference information'. An 'OK' button is visible in the Note popup. A callout box points to the Description field with the text: 'List details, location, Grant End Date and quote number if applicable.'

- The Description field is a required field for entry.
 - A Note appears when you tab into the Description field.
 - Type detailed information of your request in this field, including specific location and applicable reference information such as quote numbers.
 - If using a Grant, also list the End Date of the Grant for the Service Department.
 - The Description field hold up to 1,000 characters.
 - The more information typed in this field, the less likely the Service Department will return it to you.
 - The information in this field **DOES NOT** appear on the Budget Statement.
- **HINT: If you want the information in the Description Field to appear on the Budget Statement, highlight all wording and copy before leaving the Heading area. You can paste it into the Line Description where the first 250 characters will appear on the Budget Statement.**

Interdepartmental Order

The screenshot shows the 'Electronic IT' application window. The 'Header' section contains the following fields:

- User Name: GPEACOC
- IT Type: Interdepartmental Order
- Effective Date: 30-JAN-2018
- Service Dept: 13211 - FACILITIES SERVICES
- Description: Pete destroyed his office in a fit of rage over someone taking the last piece of chocolate. Holes in the walls need to be repaired as well as windows to be replaced. 1020 Audubon Place Room C.
- Contact Number: 5043142667
- Journal ID: I000281
- IT Status: (empty)
- Pending Approval: (empty)

The 'Journal' section is a table with the following columns: Account/Project, Natural Account, Dept Use, Task, Award, Exp Type, GL Activity/Grant Exp Date, and Line Description.

Account/Project	Natural Account	Dept Use	Task	Award	Exp Type	GL Activity/Grant Exp Date	Line Description
221017	8812-RECH	0000				31-JAN-2018	Pete destroyed his office in a fit of rage over
555773		0000	M1	555773A1			

Callouts in the image point to: 'Save Icon' (top left), 'What needs to be done along with location' (description field), 'IT Number' (Journal ID field), 'Task and award' (Task and Award columns in the Journal table), and 'Journal' (the table itself).

- Once you click into the Journal Section, the IT will be saved and the IT number will appear.
- Once you type in your account number and hit the TAB key, it will fill in the GL Activity date.
 - **NOTE: If you did not copy the Description Field to copy into the Line Description Field, you will have to complete the 1st line before clicking back into the Header area again.**
 - General Ledger accounts and Grant accounts are in the same section
 - Once the Grant number is typed in, Task and Award are automatically filled in.
 - The System knows automatically when using a Grant to go to the Exp Type field instead of Natural Account.

NOTE: IF USING A GRANT, PUT THE GRANT END DATE IN THE DESCRIPTION FIELD SO THE SERVICE DEPARTMENT WILL KNOW WHEN IT ENDS.

Interdepartmental Order

Account/ Project	Natural Account	Dept Use	Task	Award	Exp Type
221017	8812-RECH	0000			
555773		0000	M1	555773A1	88%

Search with wildcard

- A search can be done for Natural accounts using the % wildcard
 - 88XX Natural accounts are used on the Interdepartmental Order Forms.
 - The Initiator of the Interdepartmental Order Form **ONLY PUTS IN THE ACCOUNTS TO BE CHARGED.**
 - The Interdepartmental Order can be submitted without dollar amounts. The Service Department will fill them in if not known.
 - The Service Department can also change Natural Accounts and add additional lines.
 - The Service Department **CANNOT** change an account number.

Account/ Project	Natural Account	Dept Use	Task	Award	Exp Type	GL Activity/ Grant Exp Date
221017	8812-RECH	0000				30-JAN-2018
555773		0000	M1	555773A1	8817-Recharge-Othe	01-JAN-2016

Out of range

 Note

Expenditure Date should be between 01-JAN-17 and 31-DEC-23

- Grant Exp Date is a validated field. If the Grant is out of the date range, a note will pop up telling you the correct Expenditure Date Range.
- The Expenditure Date will need to be changed before any more information is allowed.

Interdepartmental Order

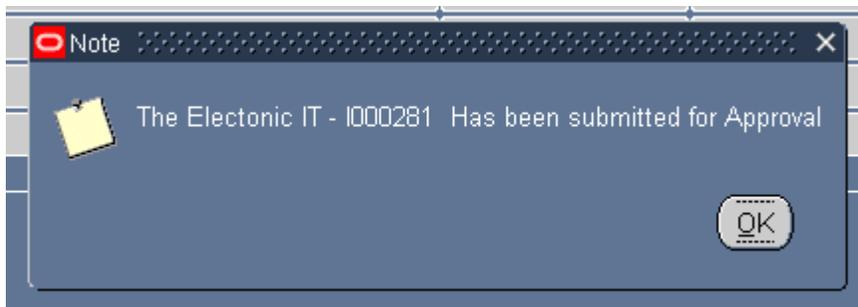
Account/ Project	Natural Account	Dept Use	Task	Award	Exp Type	GL Activity/ Grant Exp Date	Line Description	Debit	Credit
221017	8812-RECH	0000				30-JAN-2018	Pete destroyed his office in a fit of rage ove		
555773		0000	M1	555773A1	8817-Recharge-Othe	30-JAN-2018	Pete destroyed his office in a fit of rage ove		

Send to Service Org

Service Org button

Copied Text from line above.

- Any Field in the Journal Section can be copied by holding down the Shift key and hitting the F5 key at the same time.
- Once all information is input, hit the Send to Service Org button.



- Once the Interdepartmental Order has been submitted to the Service Department, a note will pop up saying your IT has been submitted.



- Once OK is clicked, another Note box will appear saying the Transaction is complete. Hit OK again.