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.

![Find Journals](image)

Click on the button labelled “New”.

![Electronic IT form](image)

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

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 – “%”.
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.
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.
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.**

- 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.
• 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.