



TEXAS SOUTHERN UNIVERSITY

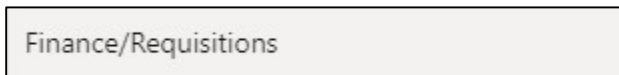
My Finance Portal User Guide

My Journals

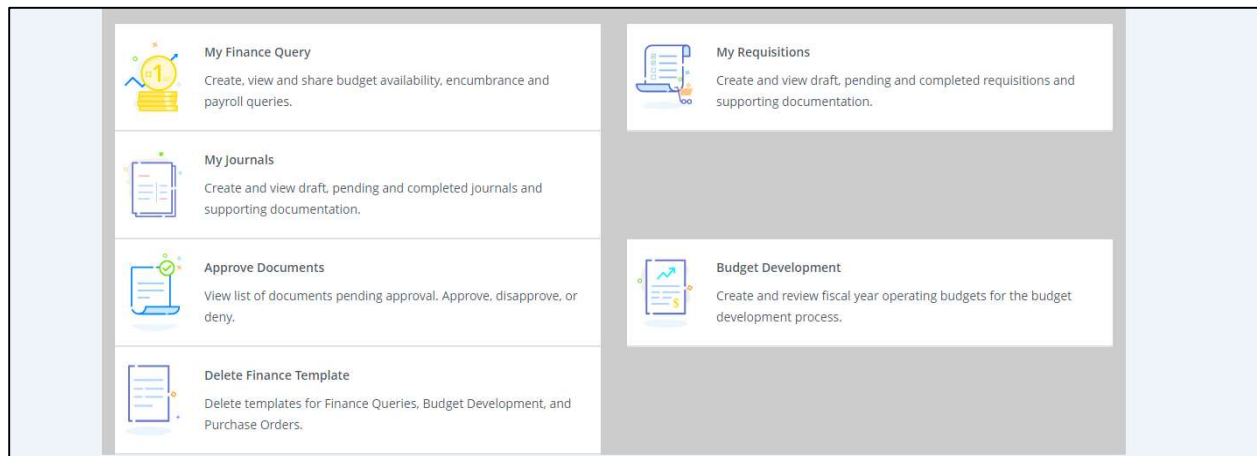
1. Navigate to MyTSU portal landing page click, **'Employee'**



2. Choose **"Finance/Requisitions"**



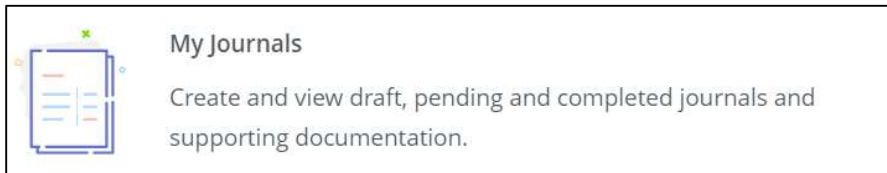
"My Finance" dashboard will launch.



My Journals

In “My Journals” you can enter budget transfer entries and attached backup documents to the entries. You can also view your entries that are pending approval or your completed & approved entries.

3. Choose “**My Journals**” widget.



4. You will be brought to the My Journals status dashboard.

It has 3 sections:

- **Draft Journals** – journals that are started, but not completed.
- **Pending Journals** – journals that are completed, but not approved.
- **Completed Journals** – journals that are completed and approved.

5. Click on “**Create Journal**” to start a new budget transfer.



6. Enter the journal entry header information, such as ‘**Transaction Date, Document Total, Journal Description** and **Journal Type**.’

Create Journal

Transaction Date *

01/11/2021

Redistribution

NSF Checking

Distribution Total

2.00

Deferred Edit

Journal Type DBTF Department Budget Trans... x v	Description test journal entry
Bank Code Choose Bank Code v	Deposit
Budget Period 05 x v	Currency Choose Currency Code v

7. Click **“Create.”**



The journal entry main section will open.

Budget transfer entry requires at least two (2) lines.

8. Enter the first sequence,

Add accounting

Sequence Number : 1 Status :

Journal Type *
DBTF Department Budget Trans... x v

Chart * Index
C Texas Southern University x v Choose Index v

Fund
0247 TSU Current Treasury Fund x v

Organization
31200 Information Technology & Systems x v

Account
7300 Consumables x v

SAVE ADD ACCOUNTING

Add accounting

Sequence Number : 1 Status :

Program Location
70 Institutional Support x v Choose Location

Activity Project
Choose Activity v Choose Project

Percent

Amount * Debit/Credit *
1.00 + Plus x v

NSF Override Document Reference

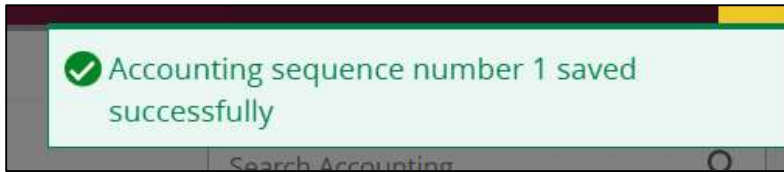
SAVE ADD ACCOUNTING

Enter **+ Plus** for the FOAPAL you are transferring budget in, and **- Minus** for the FOAPAL you are transferring budget out.

9. Click **“Add Accounting”** to add the subsequent lines.

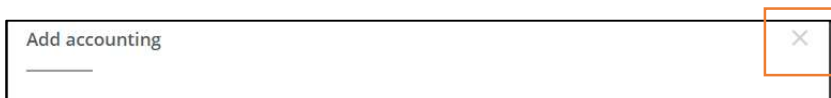


You will see a message that indicates the sequence has been successfully created and saved.

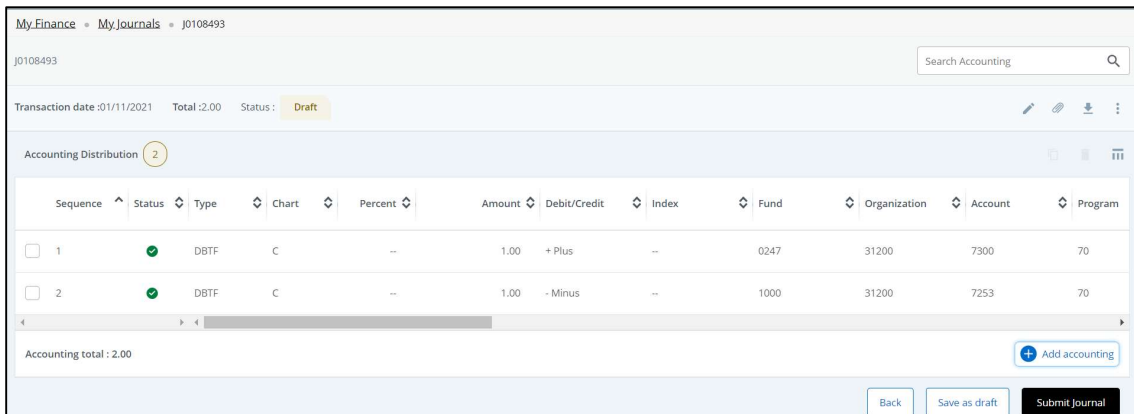


Continue entering the remaining FOAPALs.

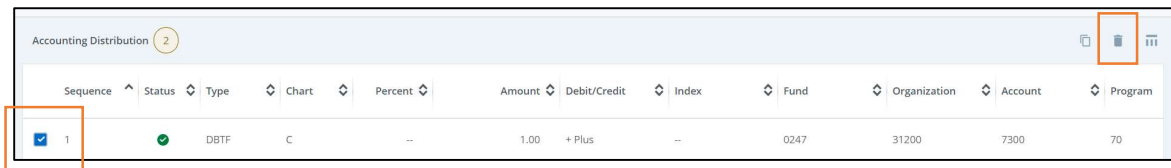
Once done, simple click on the X button to get out.



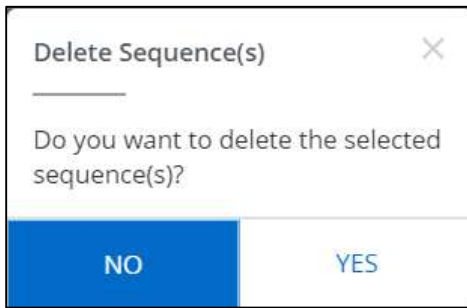
You will be brought to the summary page, where all the sequences you have entered are listed.



10. If you need to delete a sequence, click on the checkbox next to the sequence number, then click on the trash can icon.

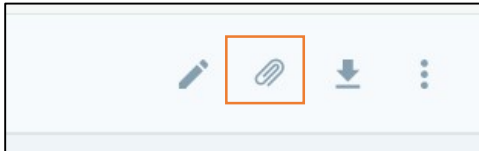


You will be prompted to confirm your selection.



You can attach a backup document to you journal entry.

11. Click on the paperclip icon.

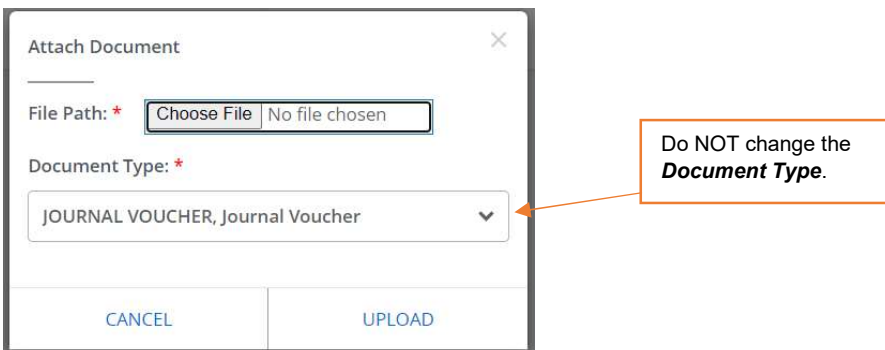


You will be brought to the **Attachments** screen.

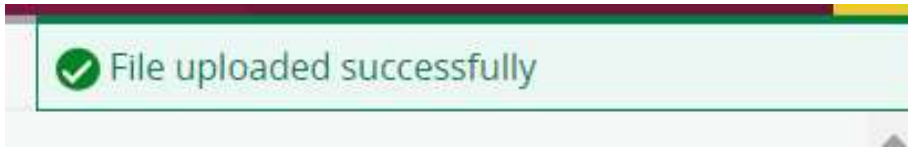
12. Click on the Attach File



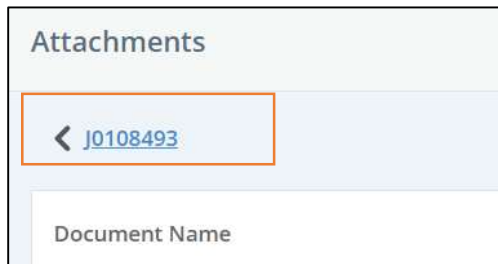
13. Choose your file you want to attach, then click **Upload**.



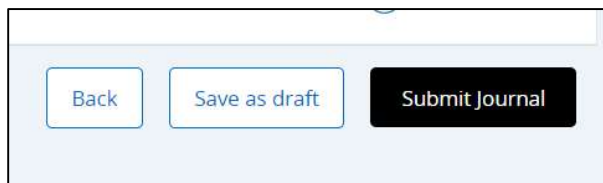
Upon successful upload you will receive a success message.



14. Click on the journal entry number to go back.



15. Once done, click **“Submit Journal.”**



Contact a representative in the Division of Administration and Finance for detailed explanation.

tsu.edu/about/administration/finance/contact-us

Technical support is available 24/7 by emailing IT Service Center: **itservicecenter@tsu.edu** or submitting a case: **<http://itservicecenter.tsu.edu>**

As always, we appreciate your support as we continue to improve the tools that ensure “Excellence in Achievement.”

