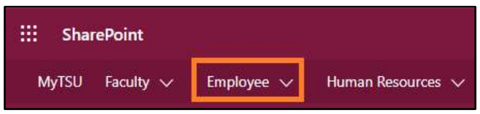
My Finance Portal
Administrator User Guide

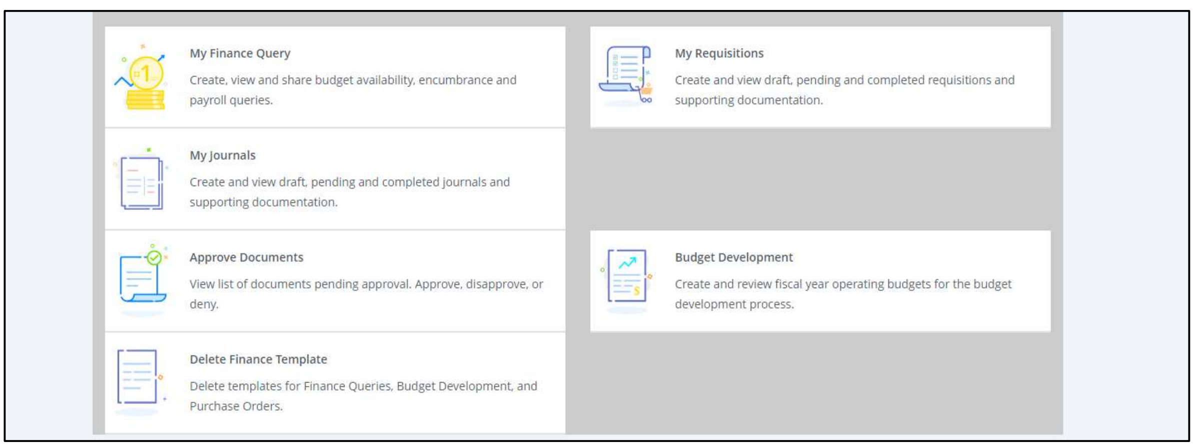
General Overview

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



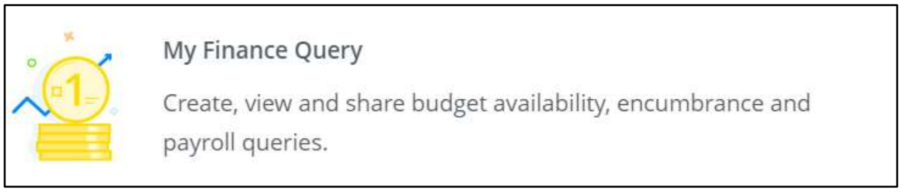
2. Choose **“Finance/Requisitions”**

“My Finance” dashboard will launch.



- Texas Southern University (TSU) administrators can create, edit, and approve transactions and view financial information for department/organization.
- New and improved MyTSU portal integrated with Finance Self-Service Banner 9 is user friendly and easy to navigate. It that looks and feels like any modern web application, and end users can effortlessly perform many tasks.

3. Choose **“My Finance Query”** widget.

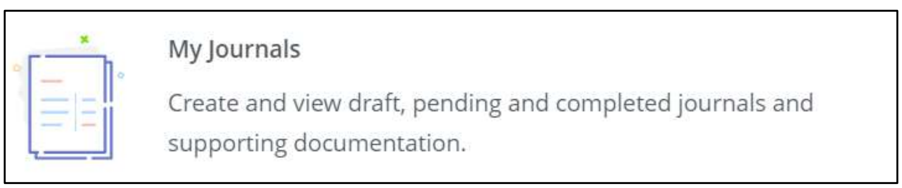


- Here, administrators can easily create, view, share new budget, and payroll queries for encumbrances, budgets, and salary expenses.

  - Click on ***New Query*** to start a new query. There are Budget Status by Account, Encumbrance Query, Multi Year Query, just to name a few. Each query requires a fund and organization code at a minimum. Administrators will only be able to access different reports based on access/privileges role.

  - After creating a query, administrators can ***Save*** a query as a ***Favorite***. The next time a user logs into Finance Self Service, the same query will be bookmarked in your My Finance Query dashboard. The query gets updated instantly and always up to date.

4. Choose **“My Journals”** widget.



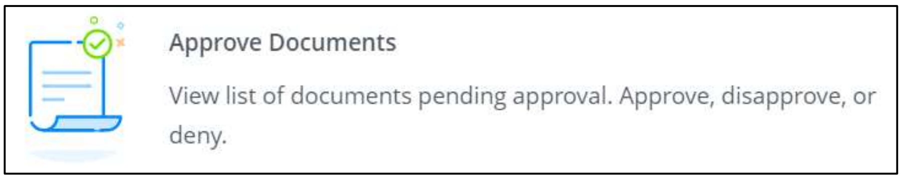
- Here administrators can enter Budget Transfer requests or other allowed journal entries, with supporting documentation.

- Administrators can also see list of entries they entered and the statuses on the dashboard.

  - While creating a journal entry, administrators can take advantage of the Banner Document Management (BDM) feature available in Finance Self-Service. BDM allows users to attach relevant documents to a journal which will be forwarded to an approver along with the journal entry. The approver will be able to retrieve the attachment added and review it for accuracy before sign-off.

  - After completing a journal, administrators can also check whose approval queue a document is in by clicking on the information icon next to the document status.

5. Choose **“Approve Documents”** widget.



- Here approvers can search for a specific document to approve or view all the documents that are pending in a queue.

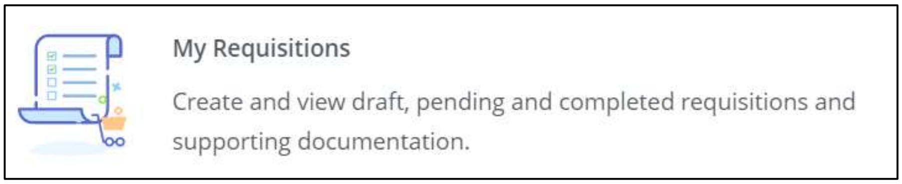
- Administrators can view list of documents pending approvals.
  - Approve, disapprove, or deny.
  - This dashboard will show document number, the originating user, and whether a document has attachment.

6. Choose **“Delete Finance Template”** widget.

- Administrators can delete any ‘Finance Query,’ ‘Budget Development,’ and ‘Purchase Orders’ created in the “My Finance Query” card/tile.

- Users can delete entry from “Delete Finance Template” card/tile.

7. Choose **“My Requisitions”** widget.



- Create and view draft, pending and completed requisitions and supporting documentation.
- Here administrators can easily enter a requisition and check the status on the dashboard. If they are completed and pending approval, users can see whose queue the requisition is sitting in. Or if the requisition is completed, administrators can check which buyer the requisition has been assigned to.
- Administrators can also use “Banner Document Management (BDM” feature to attach relevant documents to a requisition. Attachments are forward a approval along with a requisition.

8. Choose **“Budget Development”** widget.

- Create and review fiscal year operating budgets for the budget development process.
- This feature is only available for department leaders for making proposed budget changes and adjustments during the TSU’s budget planning period.
  - This module will be open only for specific fund and organization security, for designated officers.

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."