

## My Finance Portal User Guide

## **My Journals**

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



2. Choose "Finance/Requisitions"

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.

Journals			bearch journal Q Create Journ
Document	Date	Description	Total Status
Draft Journals 0			
Pending Journals	)		

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		
	Distribution Total	
Redistribution	Distribution Total	

Journal Type	Description
DBTF Department Budget Trans × V	test journal entry
Bank Code	Deposit
Choose Bank Code	
Budget Period	Currency
05 **	Choose Currency Code 🗸

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		×	] [	Add accounting			×
Sequence Number : 1	Status :			Sequence Number : 1		Status :	
Journal Type *				Program		Location	Enter + <i>Plus</i> for the FOAPAL you are
DBTF Department Budget Trans × V		- 1		70 Institutional Support	×	Choose Location	transferring budget
		- 1		Activity		Project	<u>in</u> , and – <i>Minus</i> for
Chart *	Index			Choose Activity	~	Choose Project	the FOAPAL you are
C Texas Southern University 🛛 🗙 🗸	Choose Index	~					transferring budget
Fund				Percent			<u>out</u> .
0247 TSU Current Treasury Fund		×v					
Organization				Amount *		Debit/Credit *	
31200 Information Technology & Systems		× •		1.00		+ Plus	× •
Account							
7300 Consumables		×v		NSF Override		Document Reference	
SAVE	ADD ACCOUNTING			SAVE		ADD ACC	OUNTING

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.

Add accounting	$\times$

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

My Finance  My Jo	ournals = J0108493											
J0108493									Search Accounting			۹
Transaction date :01/11/	/2021 Total :2.00	Status : Draft								1 0	Ŧ	:
Accounting Distribution	on 2											Π
Sequence ^	Status 🗘 Type	≎ Chart ≎	Percent 🗘	Amount 🗘	Debit/Credit	S Index	Fund	Organizatio	n 🗘 Account	٥	Prog	ram
1	Ø DBTF	с	-	1.00	+ Plus	-	0247	31200	7300		70	
2	OBTF	C		1.00	- Minus	-	1000	31200	7253		70	
4	$\rightarrow$ . (											+
Accounting total : 2.00	0									🕂 Add a	account	ing
								Back	Save as draft	Submi	t Journa	

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

Accou	untin	ıg Distribu	tion 2														Ō	Î	Ξ
	Seq	luence 🖌	Status 🕻	Туре	Chart	Percent \$	Amount 🗘	Debit/Credit	۰ ۵	ndex	٥	Fund	٥	Organization	٥	Account	٥	Progr	am
~	1		٥	DBTF	C		1.00	+ Plus		-		0247		31200		7300		70	

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*.

Attach Document		×	
File Path: * Choose File    Document Type: *	No file chosen		Do NOT change the <b>Document Type</b> .
JOURNAL VOUCHER, Journa	al Voucher	•	
CANCEL	UPLOAD		

Upon successful upload you will receive a success message.



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

Attachments	
<b>∢</b> <u>J0108493</u>	]
Document Name	

15. Once done, click "Submit Journal."

Back	Save as draft	Submit Journal
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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."

