

## My Finance Portal User Guide

# **My Requisitions**

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



2. Choose "Finance/Requisitions"

Finance/Requisitions

"My Finance" dashboard will launch.



## **My Requisitions**

Purchase Requisition Overview Purchase Requisition allows you to create and submit a purchase requisition. You can create a purchase requisition using either document-level or commodity-level accounting.

You can also use this application for the following:

- Save requisition as a draft (Draft status)
- Edit a draft requisition and submit a draft requisition
- Delete a draft requisition
- View requisition status
- Copy a completed requisition
- Add comments (public and private)
- Add and delete attachments using Banner Document Management
- · Recall your requisition from Banner Finance approvals
- View a requisition as a PDF

The following pages contain screenshots and instructions to walk you through the process of creating a requisition and submitting the requisition for approval.



3. Click "My Requisitions" widget.



Your My Requisition Dashboard will open.

- The dashboard contains your Draft, Pending and Converted to PO requisitions.
- 4. Click "Create Requisition" button to begin a new request.

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My Finance • My Requisitions						
My Requisitions		Search Requisition		٩	Crea	te Requisition
Requisition Date	Vendor	Amount	Status			
Draft Requisitions 0						
Pending Requisitions 0						
Completed Requisitions						

- A Draft is a requisition you have started but not completed.
- A Pending requisition is a request you have completed and sent for approval.
- A Converted to PO is a requisition that has been approved and the Purchasing department has converted to a Purchase Order.
- 5. Click on "Create Requisition" button to start a new requisition.
- 6. "Requestor Information" page will open.
- 7. Fill out the required fields, denoted by an asterisk (\*)

**NOTE**: In this example, Commodity Level Accounting is used. See below for explanations on the difference between 'Document Level Accounting' and 'Commodity Level Accounting.

8. Click "Next" once done filling out the required fields.

My Finance • My Requisitions	s - <u>Create Requisitio</u>	٥						
Create Requisition								
1 Requestor Information	Vendor Informa	tion 🔞 Add Item & A	counting				Requisition Summary	Save as draft
Requestor *				Chart*				
Gigi Cupp				C Texas Southern University		×v		
Transaction Date*	Delivery Dat	•		Organization *				
01/05/2021	01/06/202	1		31200 Information Technology & S	ystems	× ¥		Click to save it as a
Requestor Email				Ship To Location*				Draft. It will be
gigi.cupp@tsu.edu				TSUWRE Dan McCormick		ж¥	Add details and click Next to build this summa	
Choose Accounting Type				Attention To *	Tax Group			added to the <b>Draft</b>
Comment Level Accounting     Commodity Level Accounting				Dan McCormick	Choose Tax Group			Requisitions section
Requisition Comments				Ship To Location				neguisicions section
Public Comment				Attention: Dan McCormick TEXAS SOUTHERN UNIVERSITY 3715 Blodgett St.				on the dashboard.
Test requisition. This comment ca	an be viewed by anyone.			Houston TX 77004				
Private Comment								
Private Comment entered by use	er for Purchasing departme	nt.						

Choose Accounting Type:

- **Document Level Accounting** If you have only one item, or several items that are all being charged to a single FOAPAL (except fixed assets), select the Document Level Accounting. This will allow you to enter a FOAPAL once and it will be applied to all items on the requisition.
- **Commodity Level Accounting** If you are purchasing items that need to be charged to different FOAPALs, or purchasing a fixed asset(s), then select Commodity Level Accounting. This allows you to use separate FOAPAL for each item on your requisition.
- 9. Once you click "**Next**" you will receive confirmation that you have created a requisition and the number associated.



You will be on the Vendor page.

10. Uncheck, "Choose Vendor for me" box.

To select a vendor, start typing the vendor's name.

• A dropdown will appear, and you can scroll through to pick the correct vendor.

**NOTE**: Depending on how many vendors are in the database, it may take a few seconds for this field to load and populate.

inance - My Requisitions - R0123668	You can attach a pdf. Instructions to follow.	→ Ø Atta	chments
Requestor Information     Requestor Information     Add Item & Accounting     Choose vendor for me  ndor		Requisition Summary Requisition Number	Save as draft R0123668
Chose Vendor		i can delete ir requisition.	You can save your requisition as a dra
office Depot (159266395) 0.0. box 70049 Santa Ana CA 92725-0049			

- 11. Once you have your vendor selected click the "**Next**" button to move to the next section
- 12. You will be brought to the commodity page.
  - On the "Add Item(s)" field, you can type and select from the options shown.
    - You can type a new item, if it already does not exist.

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My Finance My Requisitions © R0123668		
R0123668	Attachments	Delete Requisition
Requestor information     Yendor Information     Add Item & Accounting	Requisition Summary	Save as draft
Add Item(s)	Requisition Number	R0123668
Choose Item	Office Depot (159266395) 6225 West by Northwest Blvd. Houston TX 77040	
Houston Community College (7726)		
#MX-FRX6U COMMODITY #985-02-48020-9 (9850248020)		
#MX-NSX1 COMMODITY #985-02-48015-9 (9850248015)		
190102 TS200 Pelican Internet Prg.Thermostat (BU)		
2 Full page color ad & eblast for TSU advertisment (7713)		
ADVERTISING SERVICES (7281)		

<ol> <li>Requestor Information</li> </ol>	Vendor Information	3 Add Item & Ac	counting	
dd Item(s) Choose Item Some Item	•	^ Q	New item description.	
Some item (Add as new item)				

- Once you add the item. You will be prompted to enter rest of the info, such as quantity, price, and U/M.
- If you are using *Commodity Level Accounting*, you will need to add a FOAPAL for each item you enter.
  - For *Document Level Accounting*, you can add all your items first, then add the FOAPAL at the end.

0123668		
Requestor Information	2 Vendor Information	Add Item & Accounting     Commodity     description.
ommodity Description		Commodity Comments
Some item		Public Comment
nit Of Measure *	Tax Group*	Model ABC Serial# 123456789
EACH (EA) × •	Choose Tax Group	
uantity*	Unit Price*	Private Comment
1.00	10.0000	Enter comments for the commodity item
Quantity) X (Unit Price)	USD 10.00	
iscount Amount	Additional Amount	
0.00	0.00	
ax Amount		Because we are using Commodity Level Accounting,
0.00		we have to add FOAPAL for each item we enter.
ommodity Item Total	USD 10.00	
	030 1000	

13. Then click "Add Accounting."

You will be brought to the accounting page.

Enter your FOAPAL info.

TIESAS SCATHORN UNIVERSITY						🔅 🧕 GiGi Ellucian Cup
My Finance   My Requisitions	R0123668 • Some item					
Some item						Delete Requisition
Requestor Information	2 Vendor Information	Add Item & Accounting			Requisition Summary	Save as draft
Reguisition Number (R0123668)	Currency USD	7			Requisition Number	R0123668
	Index Choose Index	Distributio	on Amount* Distribution Pe	ercent*	Office Depot (159266395) 6225 West by Northwest Blvd. Houston TX 77040	
Fund*		Discount A		ount	Commodities (1)	
0247 TSU Current Treasury Fund Organization*	× v	0.00 Tax Amour	0.00		Some Item Quantity 1.00 @ 10.0000 Additional Charges 0.00	10.00 Discount 0.00 Tax 0.00
31200 Information Technology & Sy Account*	stems	0.00 Dist (	Click <b>Save</b> once	10.00	Accounting Total	0.00
7300 Consumables	×v		entered the FOAPAL		Commodity Total	10.00
Program*	Activity	Rem	nfo. This FOAPAL	0.00	Balanced	.0%
70 Institutional Support	Choose Activity 🗸	V	will only be applied			
Location	Project		this commodity.			
Choose Location 🗸	Choose Project 🗸		o this contributy.		Grand Total - All Commodities	10.00
	,,			- 🖌	Grand Total - All Accounting	0.00
				Back	View as PDF Submit Requisition	

• When you click "**Save**", the FOAPAL info for the item will be attached to the commodity. Then you can add the subsequent items.

My Finance • My Requisitions • R0123668			Accounting added	to requisition R012366
R0123668			Ø Attachments	Delete Requisition
Requestor Information     Vendor Informati	an 3 Add Item & Accounting		Requisition Summary	Save as dra
Add (tem(s)		You can start adding	Regulsition Number	R012
Choose Item	~	the subsequent	Office Depot (159266395) 6225 West by Northwest Blvd.	
Commodities (1)			Houston TX 77040	
Some item	10.00	item. Repeat the	Commodities (1)	
Quantity 1.00 @ 10.0000	Discount 0.00	same steps.	Some item	
Additional Charges 0.00	Tax 0.00		Quantity 1.00 @ 10.0000	Discour
Funding	100%		Additional Charges 0.00	Ta
			Funding	1
			Grand Total - All Commodities	
		Back	View as PDF Submit Requisition	
8				
	em & Accounting			
	<b>^</b>			
1 am adding (Add as new item)				
tem 10.00				
ty 1.00 @ 10.0000 Discount 0.00 inal Charges 0.00 Tax 0.00				
ing 100%				
100%				

🔅 🧕 GiGi Ellucian Cupp My Finance • My Requisitions • R0123668 R0123668 Attachments
Image: Delete Requisition Vendor Information Requestor Information 3 Add Item & Accounting Requisition Summary Save as draft Add Item(s) Requisition Number R0123668 Office Depot (159266395) 6225 West by Northwest Blvd. Houston TX 77040 Choose Item ~ Commodities (2) Commodities (2) Some item 10.00 Quantity 1.00 @ 10.0000 Each item has Discount 0.00 Some item 10.00 Additional Charges 0.00 Tax 0.00 separate FOAPAL. Quantity 1.00 @ 10.0000 Discount 0.00 100% Funding Additional Charges 0.00 Tax 0.00 100% Funding 2nd item I am adding 12.00 100% Funding Grant total for all 2nd item I am adding 12.00 100% Funding items. Click on the 100% Grand Total - All Commodities 22.00 button to see the Grand Total - All Accounting 22.00 FOAPAL. View as PDF Submit Requisitio Back

#### Here are the 2 items I added to my requisition.

#### Item# 1

#### Item# 2

Some item Quantity 1.00 @ 10.0000 Additional Charges 0.00	10.00 Discount 0.00 Tax 0.00	Some Item Quantity 1.00 @ 10.0000 Additional Charges 0.00	10.0 Discount 0.0 Tax 0.0
Funding	Amount	Funding	100%
C-0247-31200-7300-70	10.00	2nd item I am adding	12.0
Accounting Total	10.00	Funding	Amou
Commodity Total	10.00	C-1000-23660-7201-10	12.0
Balanced	100%	Accounting Total	12.
2nd item I am adding	12.00	Commodity Total	12.
Funding	100%	Balanced	100

14. At any point in the requisition, you can add "Attachment" to your requisition.

• Simply click the paperclip icon.

Attachments	Delete Requisition

You will be brought to the "Attachments" page.

#### 15. Click on *Attach File*.

Attachments			
Requisition Number R01236	68		Attach File
Document Name	Document Type	Owner Name	Date of Attachment

- A prompt screen will open for you to upload your file.
- 16. Click on "Choose File" to choose your file.
- 17. Once chosen, click "Upload" button.

File Path:* Choose File No file chosen Document Type:*	Please do not change the <i>Document Type</i> . It will default to the type itself.
REQUISITION, Requisition	,

• Upon successful upload, you will receive a success message and the name of your file will be shown.

	You can add more files		*	
My.Finance • My.Requisitions • R0123668 • Attachments	by clicking Attach File.		Sile uploade	d successfully
Attachments	Or you can delete the			Delete Requisition
Requisition Number R0123668	attachment.		Requisition Summary	Save as draft
Attachments		Attach File 🖒 Refresh Attachments	Requisition Number	R0123668
Document Name Document Type	Owner Name	Date of Attactment	Office Depot (159266395) 6225 West by Northwest Blvd.	
FINANCE SELF SERVICE - BASIC NAVIGATION.PDF REQUISITION	GIGI ELLUCIAN CUPP	01/06/2021	Houston TX 77040	
			Common dialog (D)	

- 18. Click on "Attachments" to go back to the requisition.
  - When you are ready, you can now click "**Submit Requisition**" to submit your requisition.

Srand Total - All Commodities 22.00			
Srand Total All Accounting 22.00	Grand Total - Al	Commodities	22.00
Stand Total - All Accounting 22.00	Grand Total - All Accounting		22.00

Your requisition is now on your My Requisition Dashboard as Pending. The requisition is pending approval. While your requisition is in a pending status, you can recall the requisition for changes, delete the requisition once recalled and view attachments added to the requisition.

# Additional Available Functions:

## Copy a requisition

You can copy a completed requisition and use it as a template for a new requisition.

## Steps:

- 1. On the My Requisition dashboard page, click the completed requisition you want to copy. The requisition opens on the Requestor Information page.
- 2. Click Copy Requisition.
- 3. On the copy prompt, choose the appropriate option.
  - Yes The system copies the requisition and creates an identical new requisition that you can edit.
  - No The system cancels the copy.
- 4. Edit the requisition as appropriate, just as you would a new requisition.

## Delete a requisition

You can delete any requisition that is in a Draft status.

## Steps:

- 1. On the My Requisitions dashboard page, click the requisition in Draft status you want to delete. The requisition will open in the Requestor Information page (tab).
- 2. Click Delete Requisition.
- 3. On the dele prompt, choose the appropriate option.
  - Yes The system deletes the requisition
  - No The system cancels the delete

## Edit a requisition

You can edit requisitions in Draft status. To edit a requisition in Pending status, you must recall the requisition.

## Steps:

- 1. On the My Requisition dashboard page, click Draft in the Status column for the requisition that you want to edit.
- 2. Using the Next and Back Button s, edit the Requestor Information, Vendor Information and Add item & accounting pages as necessary.
- 3. Click Save as draft if you want to return to the requisition before submitting or submit requisition to send the requisition for approvals.

## Recall a requisition

You can recall requisitions that are in pending status.

#### Steps:

- 1. On the My Requisition dashboard page, open the pending requisition that you want to recall.
- 2. Click Recall My Requisition.
- 3. On the recall prompt, choose the appropriate option.
  - **Yes** The system recalls the requisition, The My Requisition dashboard page loads with the recalled requisition placed in the draft requisition section with a draft status.
  - No The system cancels the recall

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."

