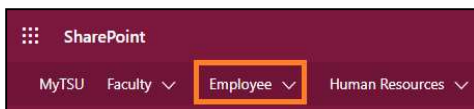**TEXAS SOUTHERN UNIVERSITY**

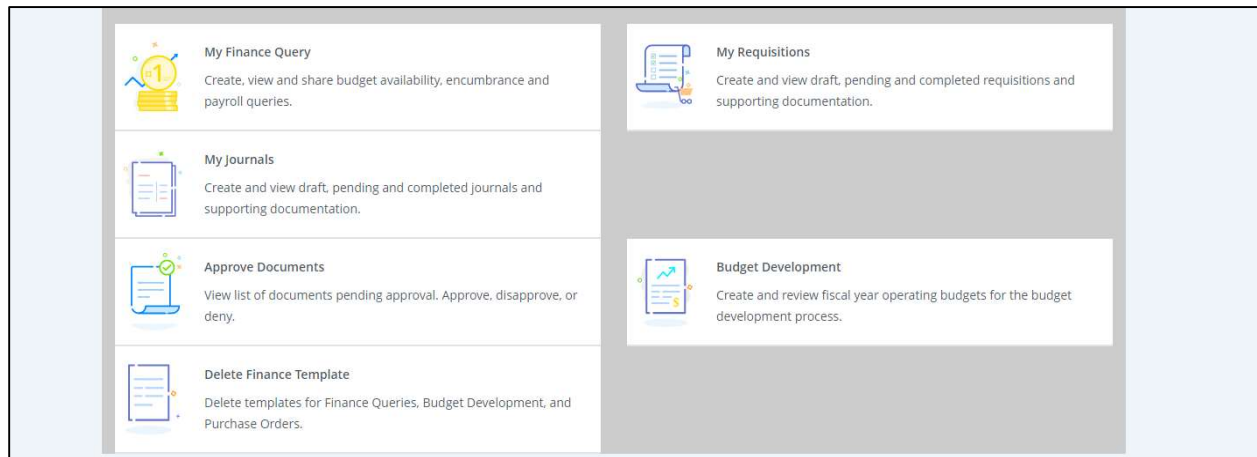# My Finance Portal
User Guide

My Finance Query

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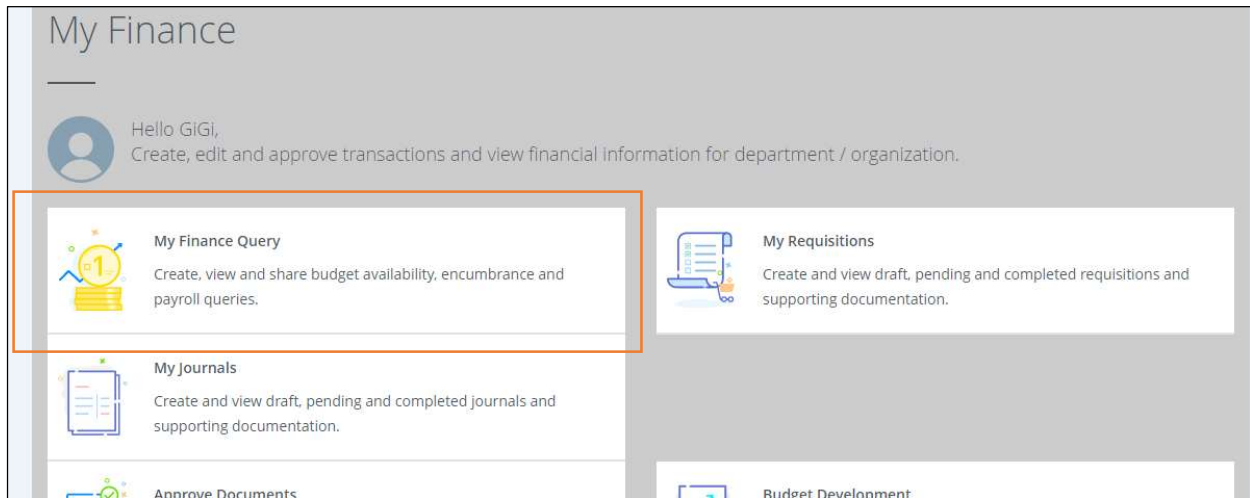

2. Choose **"Finance/Requisitions"**
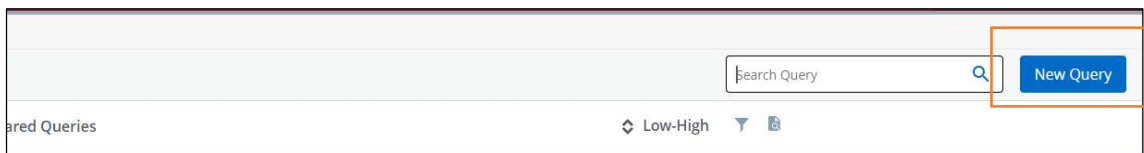

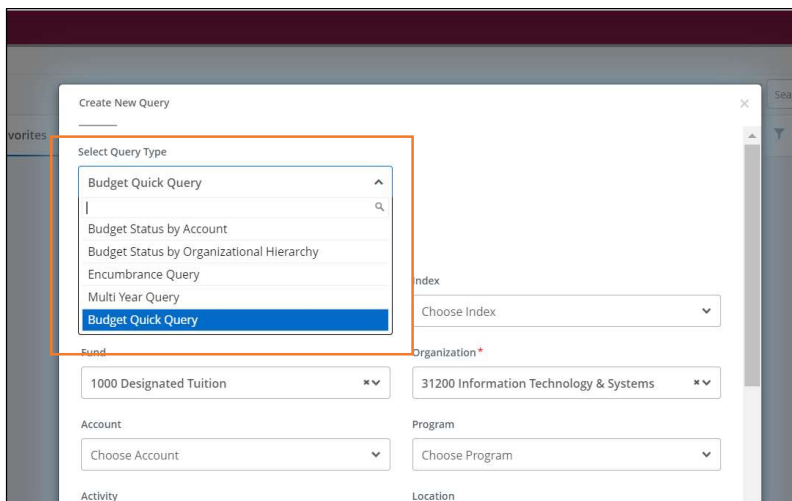**"My Finance"** dashboard will launch.

My Finance Query

In **My Finance Query**, you can run different financial queries/reports based on your Fund and Org access. In this widget, you can favorite, share, save, and download the queries which you created.
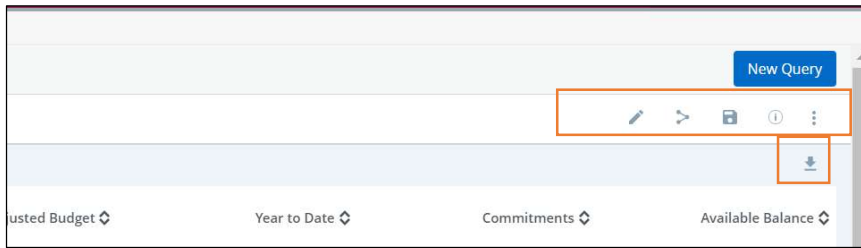

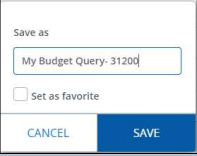3. To start a new query, click on the **"New Query"** button

4. Click on **"Select Query Type"** to see list of queries available

5. After running any of the reports, you will see the following icons on top of screen.

Key:

Icon	Description
	Edit your current query parameters and re-run your query.
	Share your current query with others, as a template. They will be able to run and see results, if they have access to the same fund and org as you do.
	Save your current query. When you click this, it will prompt you to give it a name and save it.
	Set as favorite checkbox to save a frequently used function.
	View parameters you used to run the current query.
	View Available Balance and **View Pending Documents.**
	Download the query results onto your computer as a .csv file.

Budget Quick Query

This query will give you a quick snapshot and overview of your budget.

The report contains:

- Account
- Account Title
- Adjusted Budget
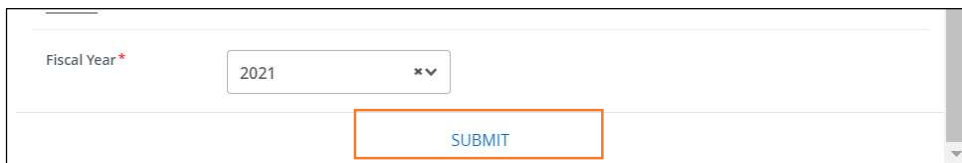- Year-to-Date expenditure
- Commitments
- Available Balance

At a minimum, you need Organization and Fiscal Year code to run this query. You can narrow your search by populating it with additional FOAPAL elements.
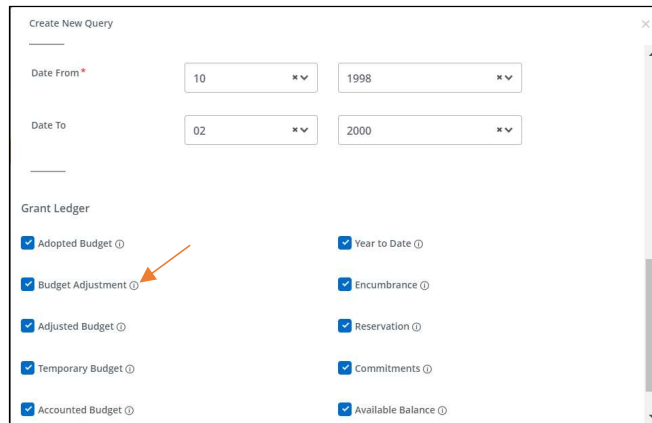
- Click **"Submit"** after you have the desired fields populated.

Multi Year Query

- This query is used for querying budget information for a multi-year fund.
  - You can run the query between two dates that can cross multiple fiscal years.
- After selecting your fund and dates, you can pick and choose which columns to include in your query.
- If you click on the information icon, next to year column name, it will give you a brief explanation of each column.

- In this report, on top of the usual actions you can take – such as save, share, and download, you can also create your own **"custom"** column.
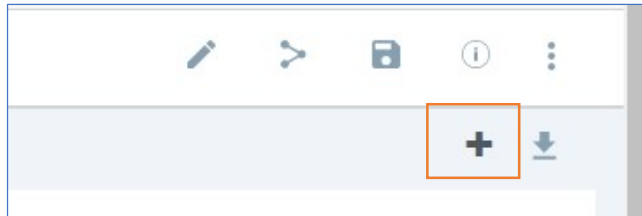
- Click on the **"Plus icon."**

- You can create a calculated column based on existing columns of the query

Encumbrance Query

This query will display all open encumbrance for your chosen FOAPAL for the period specified.

- The query will show information such as the document number, description, the original encumbrance amount, and remaining amount.
- You can see the encumbrance detail by click on the document number.
- Also, you can see the approval history of the document by clicking on the **"Information icon"** next to the document code.

Encumbrance Query

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Query Results

Account ^	Account Title ⇕	Document Code ⇕	Description ⇕	Original Commitments	Encumbrance Adjustments
7262	Maintenance and Repair-Computer SW	P0164102 ⓘ	Software House International	$99,881.86	$0.00

Budget Status by Organizational Hierarchy

You can run this query to see a comparative budget information between two (2) distinct periods.

You can also pick and choose the columns you wish to include in your query.
- The query will allow you to create your own "custom" calculated column once the result comes back.

- When the result returns, it will give you a single row of record.
  - This is the total budget information for the org you have chosen to run the query with.
- However, you can drill down to see details by clicking on anything that appears in blue font (like the org code shown below).

Budget Status by Account

This query is similar to Budget Status by Organizational Hierarchy shown above. You can run it for comparative periods, pick and choose the columns to include.

- It will return all accounts and their account information for the chose FOAPAL.
- Also, anything shown in blue font can be clicked to drill down and see additional details.

Account	Account Title	Health	FY21/PD14 Adopted Budget	FY20/PD14 Adopted Budget	FY21/PD14 Budget Adjustment	FY20/PD14 Budget Adjustment	FY21/PD14 Year to Date	FY20/P
7330	Parts-Furnishings and Equipment	✓	$24.08	$24.08	$0.00	$0.00	$326.83	

For example, when I click on the highlighted amount, it will show me list of all transactions that made up this amount.

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description		Amount	Rule Class Code
10/31/2020	11/02/2020	FU000382 ⓘ	cables		$326.83	JE16
Report Total (of all records)					$326.83	

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."

GET IT HELP
The IT Service Center is open 24/7/365 for your convenience. To report an IT problem, go to: itservicecenter.tsu.edu

To request assistance,
Email: ITServiceCenter@tsu.edu
Self-Service: http://ITServiceCenter.tsu.edu
Call: 713-313-4357 or 713-313-HELP