

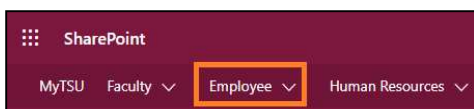


TEXAS SOUTHERN UNIVERSITY

My Finance Portal User Guide

My Requisitions

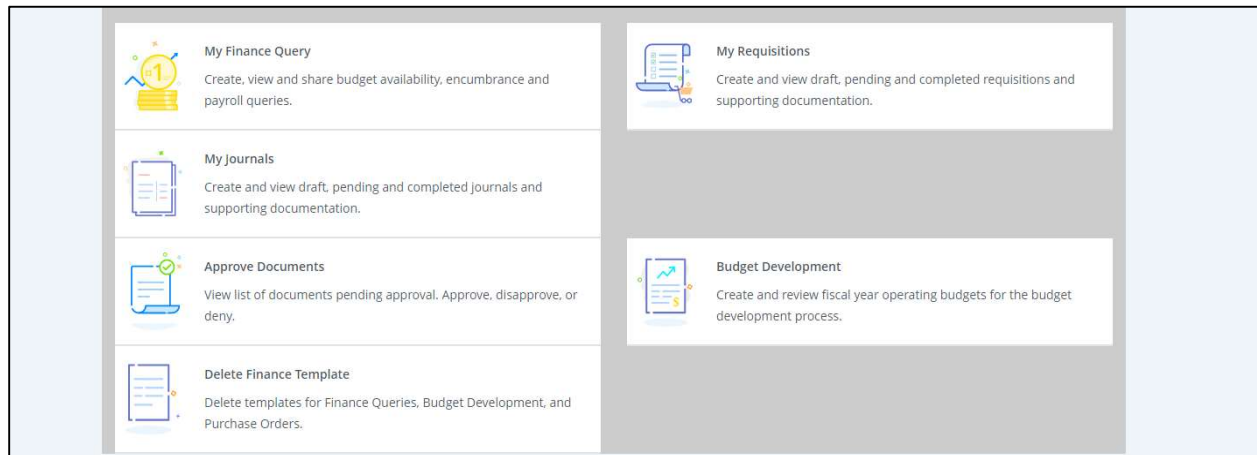
1. Navigate to MyTSU portal landing page click, ‘Employee’



2. Choose “Finance/Requisitions”



“My Finance” dashboard will launch.



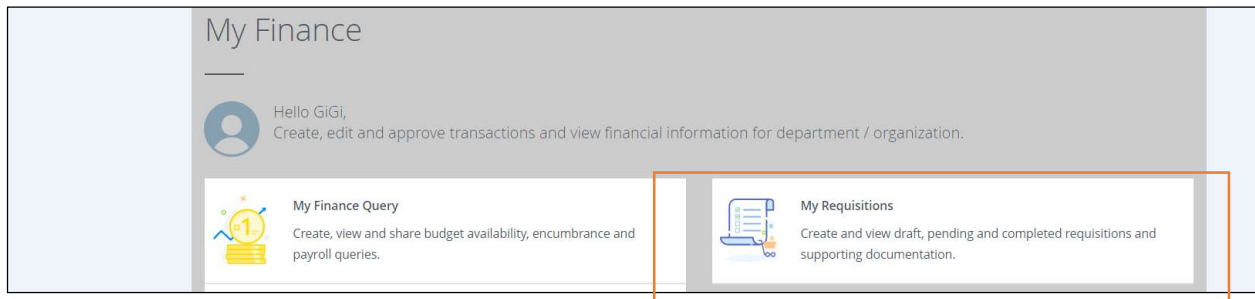
My Requisitions

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.

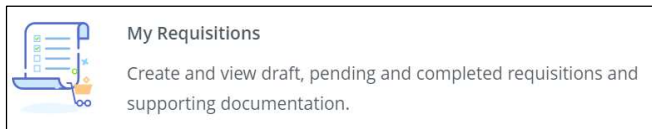
You can also use this application for the following:

- 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.



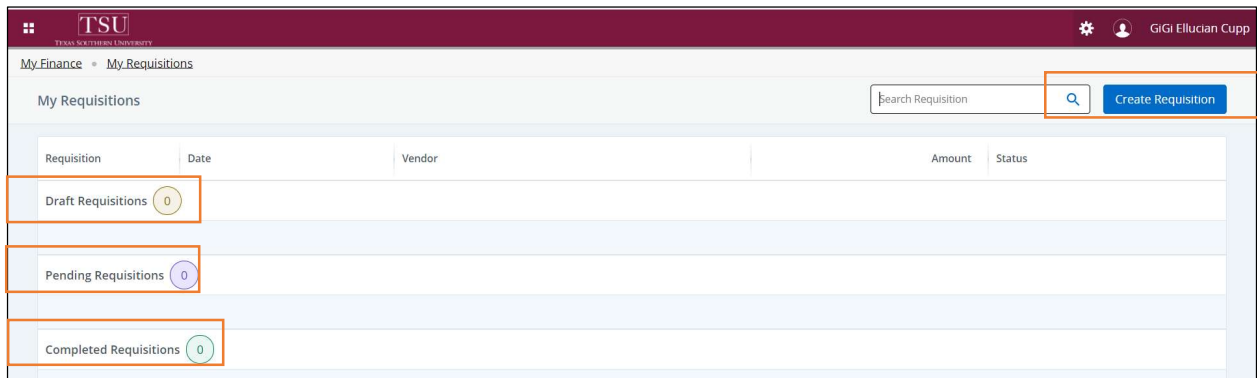
3. Click “My Requisitions” widget.



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.



- 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.

MyFinance - My Requisitions - Create Requisition

Create Requisition

1 Requestor Information 2 Vendor Information 3 Add Item & Accounting

Requestor *
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Transaction Date* 01/05/2021 Delivery Date* 01/06/2021

Requestor Email
gicupp@tsu.edu

Choose Accounting Type
Document Level Accounting
Commodity Level Accounting

Requisition Comments
Public Comment
Text requisition. This comment can be viewed by anyone.

Private Comment
Private Comment entered by user for Purchasing department.

Chart *
C Texas Southern University

Organization *
31200 Information Technology & Systems

Ship To Location *
TSUWRE Dan McCormick

Attention To *
Dan McCormick

Tax Group
Choose Tax Group

Ship To Location
Attention: Dan McCormick
TEXAS SOUTHERN UNIVERSITY
3713 Budget St.
Houston TX 77004

Requisition Summary
Add details and click Next to build this summary view.

Save as draft

Click to save it as a Draft. It will be added to the **Draft Requisitions** section on the dashboard.

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.

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✔ Draft Requisition R0123668 created successfully

Attachments Delete Requisition

Requisition Summary
Save as draft

Requisition Number R0123668

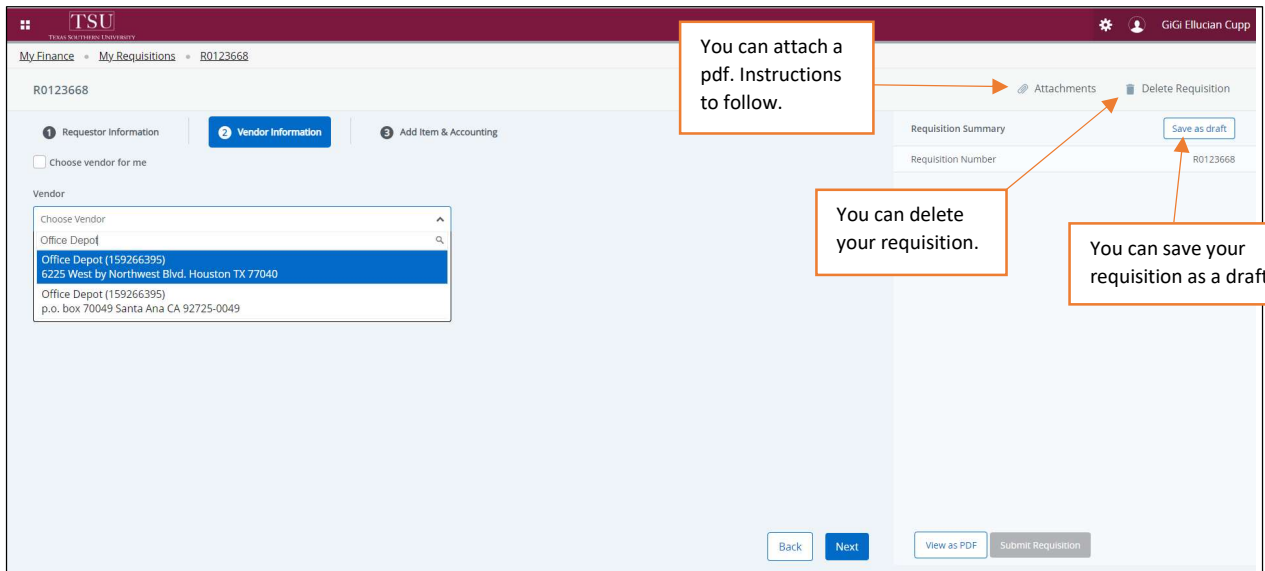
You will be on the Vendor page.

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.

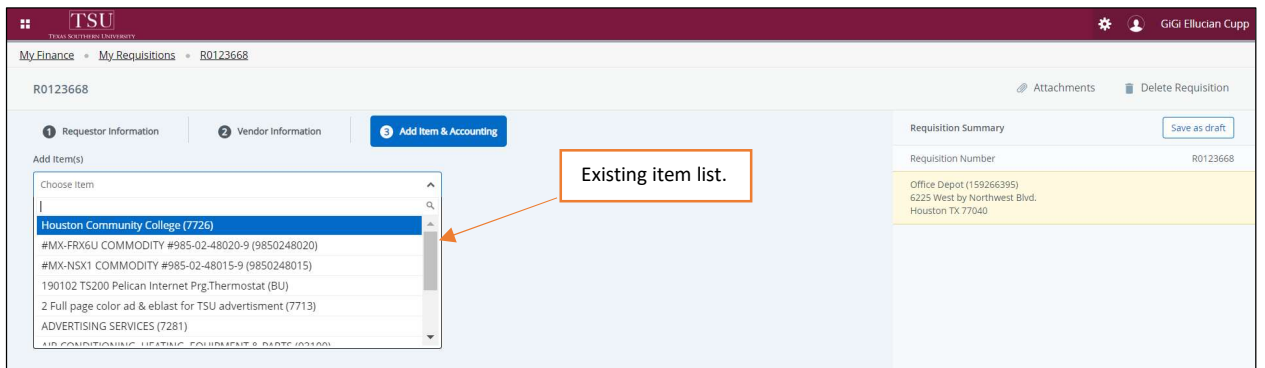


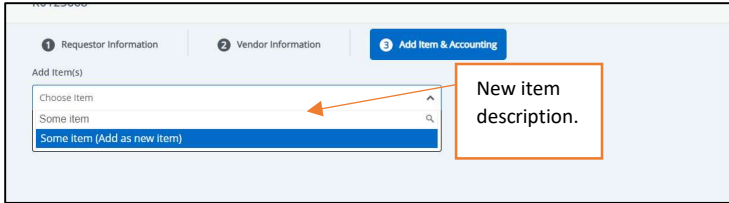
11. Once you have your vendor selected click the “**Next**” button to move to the next section

12. You will be brought to the commodity page.

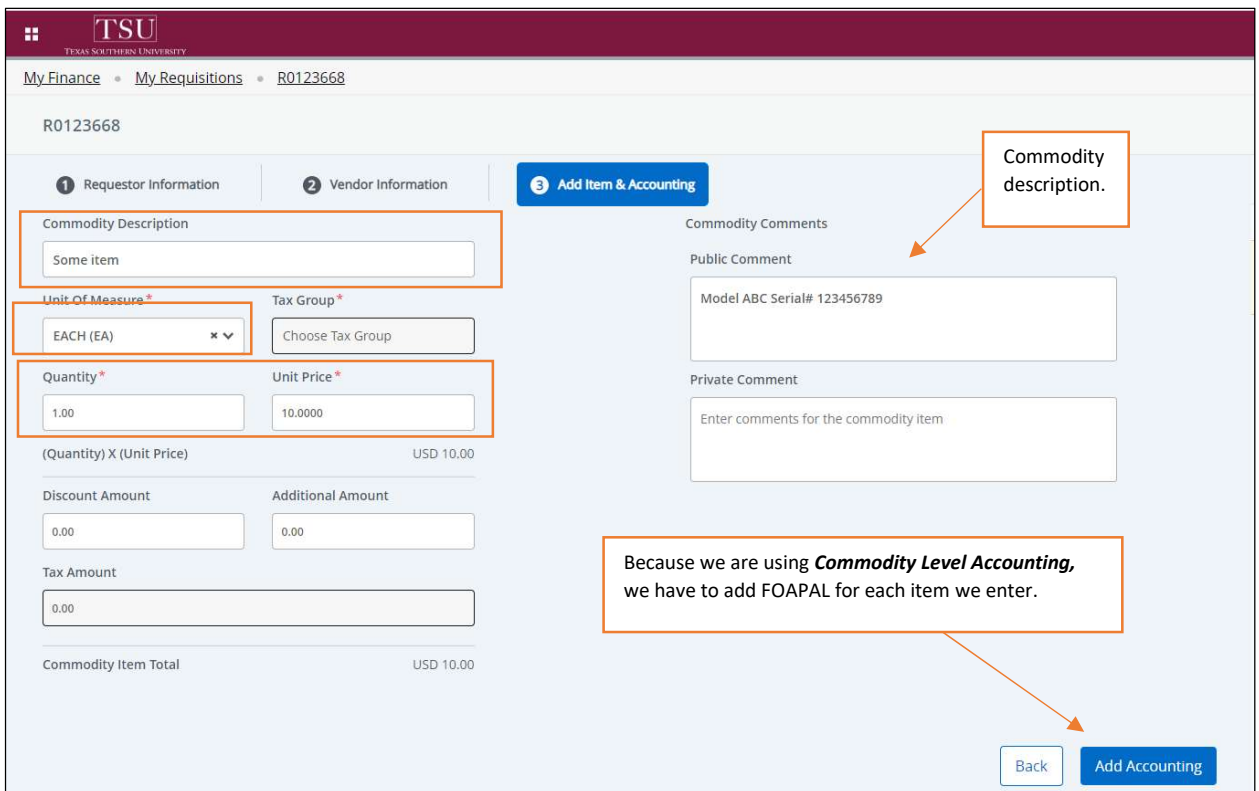
On the “**Add Item(s)**” field, you can type and select from the options shown.

- You can type a new item, if it already does not exist.





- 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.



13. Then click “Add Accounting.”

You will be brought to the accounting page.

Enter your FOAPAL info.

Requisition Summary	
Requisition Number	R0123668
Office Depot (159266395) 6225 West by Northwest Blvd. Houston TX 77040	
Commodities (1)	
Some Item	10.00
Quantity 1.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Accounting Total	0.00
Commodity Total	10.00
Balanced	0%
Grand Total - All Commodities	10.00
Grand Total - All Accounting	0.00

- When you click “Save”, the FOAPAL info for the item will be attached to the commodity. Then you can add the subsequent items.

Commodities (1)	
Some Item	10.00
Quantity 1.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%

Commodities (1)	
Some Item	10.00
Quantity 1.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%

Here are the 2 items I added to my requisition.

Each item has separate FOAPAL.

Click on the 100% button to see the FOAPAL.

Grant total for all items.

Requisition Summary	
Requisition Number	R0123668
Office Depot (159266395) 6225 West by Northwest Blvd. Houston TX 77040	
Commodities (2)	
Some Item	10.00
Quantity 1.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%
2nd item I am adding	12.00
Funding	100%
Grand Total - All Commodities	
22.00	
Grand Total - All Accounting	
22.00	

Item# 1

Commodities (2)	
Some Item	10.00
Quantity 1.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	Amount
C-0247-31200-7300-70	10.00
Accounting Total	
10.00	
Commodity Total	10.00
Balanced	100%
2nd item I am adding	12.00
Funding	100%

Item# 2

Commodities (2)	
Some Item	10.00
Quantity 1.00 @ 10.0000	Discount 0.00
Additional Charges 0.00	Tax 0.00
Funding	100%
2nd item I am adding	12.00
Funding	Amount
C-1000-23660-7201-10	12.00
Accounting Total	
12.00	
Commodity Total	12.00
Balanced	100%

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

- Simply click the paperclip icon.

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

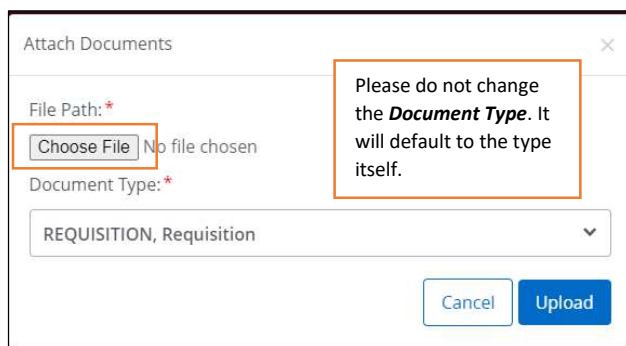
15. Click on **Attach File**.



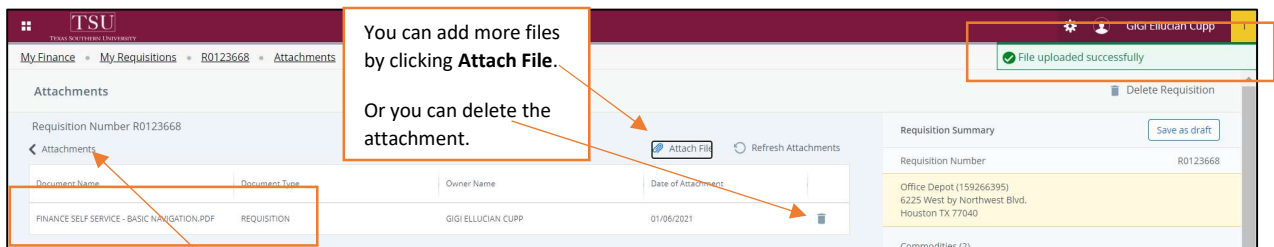
- A prompt screen will open for you to upload your file.

16. Click on “**Choose File**” to choose your file.

17. Once chosen, click “**Upload**” button.

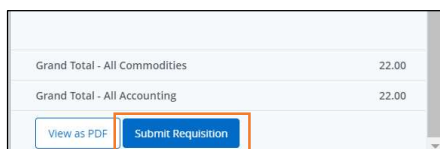


- Upon successful upload, you will receive a success message and the name of your file will be shown.



18. Click on “**Attachments**” to go back to the requisition.

- When you are ready, you can now click “**Submit Requisition**” to submit your requisition.



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 Buttons, 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.”

