

Oregon Tech

Budget Authority Invoice Approval Process

Effective in Fiscal Year 2016-17

Beginning with our new fiscal year (2016-17), all invoice documents will be approved electronically in our system. For budget authorities, this means you will no longer be required to manually sign paper documents. Approvals can be done via MyOIT in a web-based format, so you can approve from anywhere you are able to log into MyOIT.

Office managers and other support personnel will be entering the invoice information into our Banner system. Once the Banner document has been completed, it will electronically route to your approval queue. You will receive an email notification of documents awaiting approval.

Approval Process Steps:

- Log into MyOIT.
- Choose the “Web for Faculty / Web for Employee” link.

Oregon TECH MyOIT

MyOIT › MyOIT Home

Home HR Student Resources Faculty/Staff Technology Services Reporting

Oregon Tech Email
Check your campus email account

File Manager
Access files in your Oregon Tech home directory

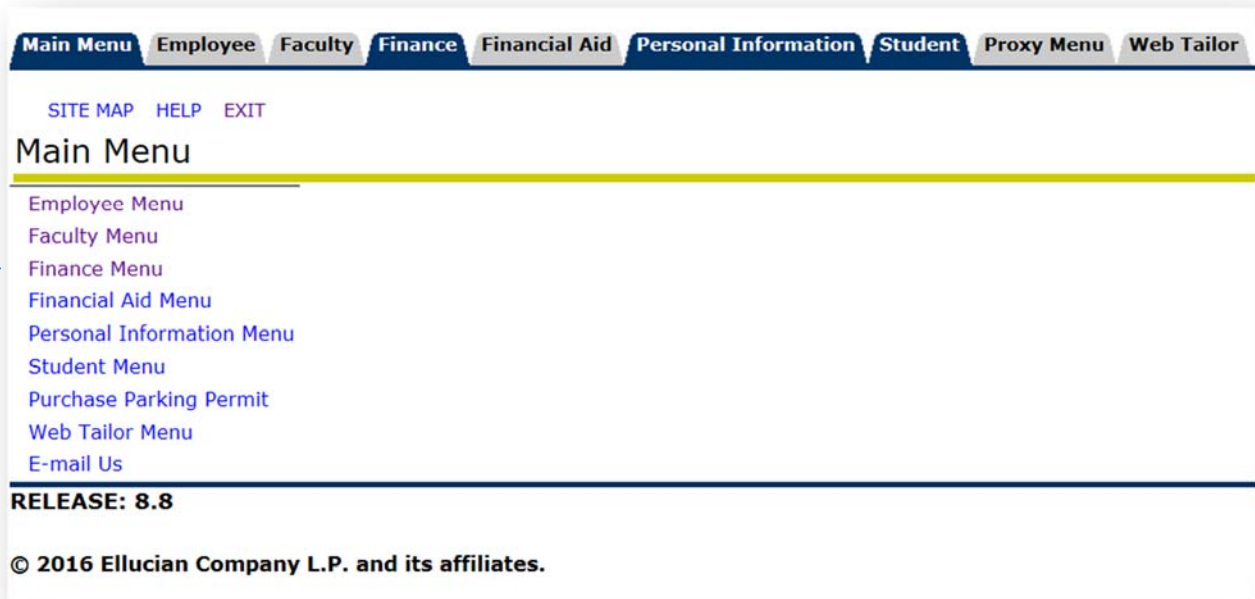
Blackboard
Online classes

Banner
Manage FIS, HRIS and SIS information

Web for Faculty / Web for Employee
Manage class information and view payroll information

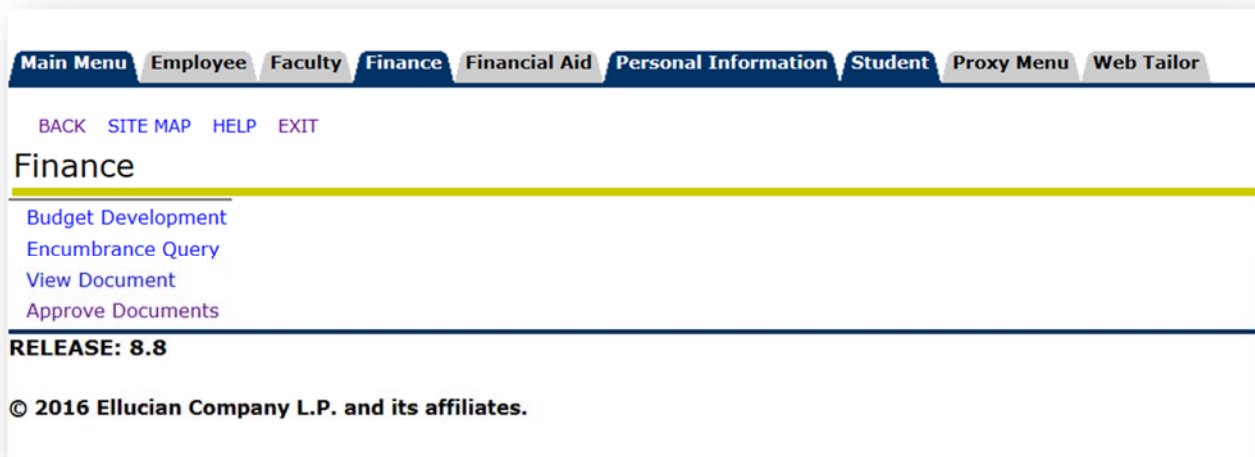
Provide Feedback
What do you or don't you like about MyOIT? What would you like to see added?

- Choose the “Finance Menu” link.



The screenshot shows a web application interface with a top navigation bar containing links: Main Menu, Employee, Faculty, Finance, Financial Aid, Personal Information, Student, Proxy Menu, and Web Tailor. Below the navigation bar, there are links for SITE MAP, HELP, and EXIT. The main heading is "Main Menu". A list of menu items follows: Employee Menu, Faculty Menu, Finance Menu, Financial Aid Menu, Personal Information Menu, Student Menu, Purchase Parking Permit, Web Tailor Menu, and E-mail Us. A blue arrow points to the "Finance Menu" link. Below the menu items, there is a section labeled "RELEASE: 8.8" and a copyright notice: "© 2016 Ellucian Company L.P. and its affiliates."

- Choose the “Approve Documents” link.



The screenshot shows the Finance page of the web application. The top navigation bar is the same as in the previous screenshot, with "Finance" highlighted. Below the navigation bar, there are links for BACK, SITE MAP, HELP, and EXIT. The main heading is "Finance". A list of links follows: Budget Development, Encumbrance Query, View Document, and Approve Documents. A blue arrow points to the "Approve Documents" link. Below the links, there is a section labeled "RELEASE: 8.8" and a copyright notice: "© 2016 Ellucian Company L.P. and its affiliates."

- Your User ID will automatically populate. If you have a specific document you are looking for, you can also enter the Document Number (Banner assigned number, begins with "I" and has 8 characters).
- You can choose to look only at the documents where you are the next approver in line, or you can choose to look at all documents that will eventually route to you for approval.
- Click on the "Submit Query" icon.

Main Menu **Employee** **Faculty** **Finance** **Financial Aid** **Personal Information**

[BACK](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Approve Documents

Enter Approval Parameters

User ID

Document Number:

Documents for which you are the next approver

All documents which you may approve

RELEASE: 8.3


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- The documents you requested will be listed, along with links to view the details and approval history of each one. There are also links to approve or disapprove the document. If you want to go back and query on something different, click on the “Another Query” icon at the bottom of the screen.

[Main Menu](#)
[Employee](#)
[Faculty](#)
[Finance](#)
[Financial Aid](#)
[Personal Information](#)
[Student](#)
[Proxy Menu](#)
[Web Tailor](#)

[BACK](#)
[SITE MAP](#)
[HELP](#)
[EXIT](#)

Approve Documents

 Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve/Disapprove link, if enabled, to disapprove the document.

Queried Parameters

User ID	LORIHARRIS	Lori Harris
Document Number:		
Documents Shown:	Next Approver	

Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	PO				DIANEPATTERSON	1,535,500.00	DOC	P0032390	History	Approve	Disapprove
Y	PO	Y			DIANEPATTERSON	2,584.85	DOC	P0032401	History	Approve	Disapprove
Y	INV	Y		0	JEANNETTEWESSEL	675.39	NSF	I0238998	History	Approve	Disapprove
Y	INV	Y		0	JEANNETTEWESSEL	23.06	NSF	I0239000	History	Approve	Disapprove
Y	JV	Y		0	TRISHAHOWER	240.00	DOC	J0044524	History	Approve	Disapprove
Y	JV			0	TRISHAHOWER	160.00	DOC	J0044553	History	Approve	Disapprove
Y	JV			0	TRISHAHOWER	30.00	DOC	J0044582	History	Approve	Disapprove
Y	JV			0	TRISHAHOWER	10.00	DOC	J0044583	History	Approve	Disapprove
Y	JV	Y		0	TRISHAHOWER	20.00	DOC	J0044584	History	Approve	Disapprove
Y	JV	Y		0	HATFIELD	1,727,023.78	NSF	J0044588	History	Approve	Disapprove
Y	JV	Y		0	SUECAIN	2,400.00	DOC	J0044646	History	Approve	Disapprove
Y	JV			0	VICKIGOHEEN	4,246.84	DOC	J0044647	History	Approve	Disapprove

RELEASE: 8.3

- The example below is of Document # I0239000 listed above. If there are any scanned backup documents to view, there will be a link to them at the bottom of the form.



Invoice	Sub#	Purchase Order	Invoice Date	Trans Date	Payment Due	Total
I0239000	0		May 12, 2016	May 26, 2016	May 26, 2016	23.06
Complete:	Y	Approved:	N	Vendor Inv	628449	
Open Paid:	O	Suspense:	N	Hold:	N	
Credit Memo:	N	Cancel Date:		Recurring:	N	
1099 Tax Id:	020302143	1099 Vendor:	Y	Income Type	NA	
Accounting:	Document Level					
Vendor:	918190541	Yankee Book Peddler Inc dba YBP Library Services				
	PO Box 277991					
	Atlanta, GA 30384 7991 United States of America					
Collects Tax:	Collects No Taxes					
Discount Code:						
Currency:						

Invoice Commodities

Vendor Invoice:	628449	Vendor Inv Item	1					
Item	Commodity	Description						
1		order for item listed in doctext						
P O Item	U/M	Tax Group	TolOverride	Final Pmt	Last Rcv	Suspense		
						N		
			Approved	Disc	Addl	Tax	Net	
Amount			23.06	0.00	0.00	0.00	23.06	
Total of all Commodities		23.06						

Invoice Accounting

Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj
		Bank	NSF	Susp	NSFOvr	Approved	Disc	Tax	Addl	Net
1	H	16	LIB002	001005	001610	40190	30001	LGB6		
		B1	Y	N		23.06	0.00	0.00	0.00	23.06
Total of displayed sequences:										23.06




✓ No Related Documents Available

RELEASE: 8.5.0.4

- If you click on the “History” link for a document, it will show you all users who have previously approved or disapproved the document.

View Document

Document Identification



Document Number	I0239000	Type	Invoice
Originator:	JEANNETTEWESSEL	Jeannette Wessel	

Approvals required

Queue	Description	Level	Approvers
NSF	NSF QUEUE	1	
			Denise Reid aaa
			Lori Harris aaa
			Michelle Meyer aaa
			Diana Angeli
			Lori Harris
			Sue Cain

Approvals recorded

Queue	Level	Date	User
LIB2	1	May 26, 2016	Jeannette Wessel
APAY	1	Jun 06, 2016	Jessica Barnett

RELEASE: 8.5.0.4

- If you wish to approve the document, click on the “Approve” link for the document from the document listing screen. Adding a comment is optional. Click on the “Approve Document” icon to complete the approval process. NOTE: If you click on the “Disapprove” link, the same type of box will appear stating the document has been disapproved. Please notify the originator of the document of the disapproval so that it can be corrected and re-submitted.

BACK SITE MAP HELP EXIT

Approve Document

Document Information

Document Number:	I0239000	Type:	INV
Change Seq#		Sub#	0
Amount:	23.06		

Comment:

RELEASE: 8.4

- The following notification will display confirming the document was approved.

Main Menu Employee Faculty Finance Finance

BACK SITE MAP HELP EXIT

Document Pending Approval

✔ Document I0239000 has your approval.

- Click on the “Continue” icon to return to the listing of documents waiting to be approved.