

Budget Authority Approval Instructions
MyOIT.edu / Self-Serve Banner (SSB)
Business Affairs Office

Introduction:

Thank you for being a Budget Authority! These directions will take us step-by-step through the document approval process in MyOIT.edu.

The directions cover: **(1)** What We Are Approving **(2)** How to Approve **(3)** Email Notification Questions.

Please do not hesitate to reach out with any questions you may have during the approval process. Please email questions to: FIS@OIT.edu, or by phone at 541.885.1628.

(1) What Are We Approving:

Through MyOIT.edu Budget Authorities may approve vendor invoices for payment or vendor purchase orders (POs).

Banner FIS access and Budget Authority forms will need to be in place before Approval access can be granted. The BAO can help you complete the required forms and also help route for approval. Please contact the BAO at FIS@OIT.edu, or by phone at 541.885.1628.

(2) How to Approve:

- MyOIT.edu can be found on the OIT homepage, or at:
[https://my.oit.edu/ layouts/MyOIT/Login.aspx?ReturnUrl=%2f_layouts%2fAuthenticate.aspx%3fSource%3d%252F&Source=%2F](https://my.oit.edu/layouts/MyOIT/Login.aspx?ReturnUrl=%2f_layouts%2fAuthenticate.aspx%3fSource%3d%252F&Source=%2F)
- Log-in to MyOIT.edu with your credentials:

Oregon TECH MyOIT

SECURE LOGIN

Username

Password ([Forgot my password](#))

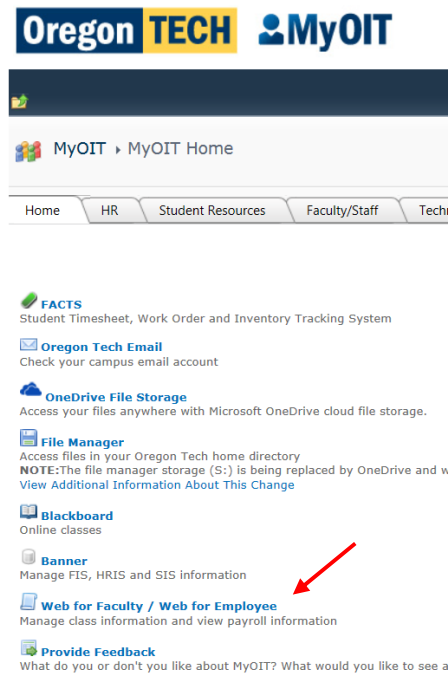
LOGIN

Faculty/Staff: [Internal Login](#)

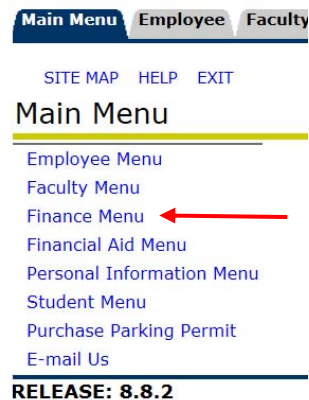
LOGIN TO ACCESS

- [Campus Announcements](#)
- [Course Registration](#)
- [Email](#)
- [DegreeWorks](#)
- [Home Directory Files](#)
- [Online Courses](#)
- [Student Records/Account Summary](#)

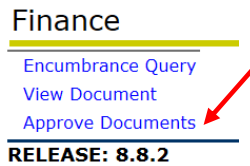
- Once logged-in, click the “Web for Faculty / Web for Employee” link on the left-hand side of the page:



- A “Main Menu” screen will appear. Select “Finance Menu”:



- The “Finance” screen will appear. Select “Approve Documents”:



- The “Approve Documents” screen will appear.
 - Your Banner User ID will automatically appear as well as defaulting to the first bullet, “Documents for which you are the next approver”:

Approve Documents

Enter Approval Parameters

User ID: MICHELLEMEYER

Document Number:

☒ Documents for which you are the next approver
☐ All documents which you may approve

Submit Query

RELEASE: 8.3

© 2018 Ellucian Company L.P. and its affiliates.

- Click the “Submit Query” button - the “Approve Documents” screen will be brought up. This screen will allow review of the actual vendor invoice (or PO information) and Approve, or Disapprove the document.

Queried Parameters

User ID	MICHELLEMEYER	Michelle Meyer
Document Number:		
Documents Shown:	Next Approver	

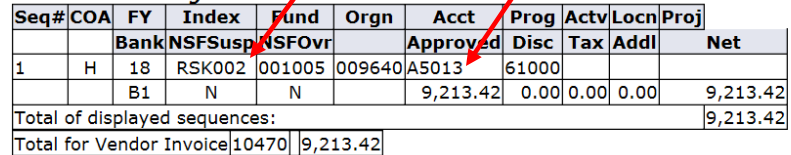
Approve Documents List

Next Approver	Type	NSF	Change Seq#	Sub#	Originating User	Amount	Queue Type	Document	History	Approve	Disapprove
Y	INV			0	DIANAANGELI	9,213.42	DOC	10251409	History	Approve	Disapprove
Y	INV	Y		0	DIANAANGELI	22,701.97	DOC	10251410	History	Approve	Disapprove
Y	INV			0	MARYCHIVERS	97.35	DOC	10251447	History	Approve	Disapprove
Y	INV			0	MARYCHIVERS	452.03	DOC	10251448	History	Approve	Disapprove
Y	INV			0	MARYCHIVERS	750.00	DOC	10251449	History	Approve	Disapprove

- To select a document, click the blue “Document Number” you would like to view.

- “View Document Screen” will appear.
 - The “Invoice Accounting” section towards the bottom of the screen shows the amount charged to an index and the account code used.
 - Sometimes an invoice or PO is charged to multiple indexes. The various indexes will also be listed in this section. This can help double check that the correct amount has been charged to an index(s).

Invoice Accounting



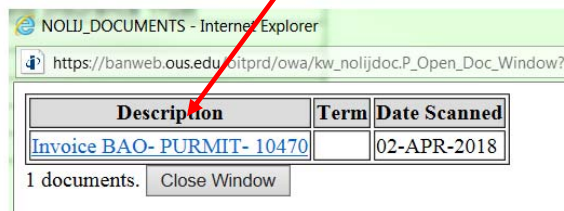
Seq#	COA	FY	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj
			Bank	NSFSusp	NSFOvr	Approved	Disc	Tax	Addl	Net
1	H	18	RSK002	001005	009640	A5013	61000			
		B1	N	N		9,213.42	0.00	0.00	0.00	9,213.42
Total of displayed sequences:										9,213.42
Total for Vendor Invoice				10470	9,213.42					

- To view the vendor invoice, click the grey “Nolij Documents” button at the bottom of the screen:

Nolij Documents

RELEASE: 8.5.0.4

- A pop-up window will appear, click the blue link under “Description”:

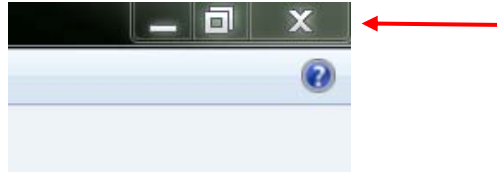


Description	Term	Date Scanned
Invoice BAO- PURMIT- 10470		02-APR-2018

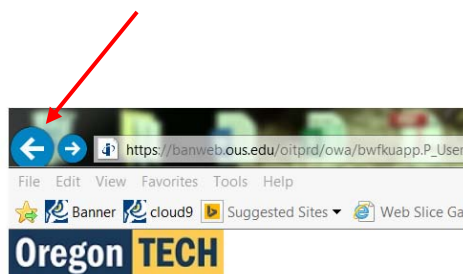
1 documents. [Close Window](#)

- The vendor invoice will appear and can be used to review to ensure the vendor and dollar amount to be paid are correct and to see if the goods/services have been received and accepted.

- When done viewing, close the invoice window and the Noli Documents window by clicking the “X” in the upper right-hand corners.



- To approve, or disapprove the document: (1) Click back button, and (2) Click the “Approve” or “Disapprove” blue links on the Approve Documents List.



Queried Parameters

User ID	MICHELLEMEYER	Michelle Meyer
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	INV				0	DIANAANGELI	9,213.42	DOC	I0251409	History	Approve	Disapprove
Y	INV	Y			0	DIANAANGELI	22,701.97	DOC	I0251410	History	Approve	Disapprove
Y	INV				0	MARYCHIVERS	97.35	DOC	I0251447	History	Approve	Disapprove
Y	INV				0	MARYCHIVERS	452.03	DOC	I0251448	History	Approve	Disapprove
Y	INV				0	MARYCHIVERS	750.00	DOC	I0251449	History	Approve	Disapprove

- The “Approve” button will send the document to the next approver.
- The “Disapprove” button will send the document to the Originating User to make any needed changes. After making the changes, the Originating User resubmits the document. Once resubmitted, the document will reappear for your approval.

(3) Email Notification Questions

- A Budget Authority may receive a nightly automated email that a document is ready for their approval, but when logged in, no documents appear. While the Budget Authority may need to approve, it has not yet been approved by the “Next” approver (an individual who proceeds the Budget Authority in the approval process).
 - The document can be viewed and approved by changing the default option at the “Approve Documents” screen.
 - Log-in as normal until the “Approve Documents” screen is reached
 - Select the second button, “All documents which you may approve” and click the grey “Submit Query” button.

Approve Documents

Enter Approval Parameters

User ID: MICHELLEMEYER

Document Number:

☐ Documents for which you are the next approver

☒ All documents which you may approve

Submit Query

RELEASE: 8.3

- All documents available for approval will appear. The regular steps to view and approve/disapprove a document can be followed.

Please do not hesitate to let us know if we can help with any questions you may have, or if we can improve the instructions. Please contact us at FIS@oit.edu, or by phone at 541.885.1628.

Thank you!

-Business Affairs Office