

**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](mailto:FIS@OIT.edu), or by phone at 541.885.1628.

Budget Authority Approval Instructions are also available on the BAO webpage:  
<https://www.oit.edu/faculty-staff/ba>

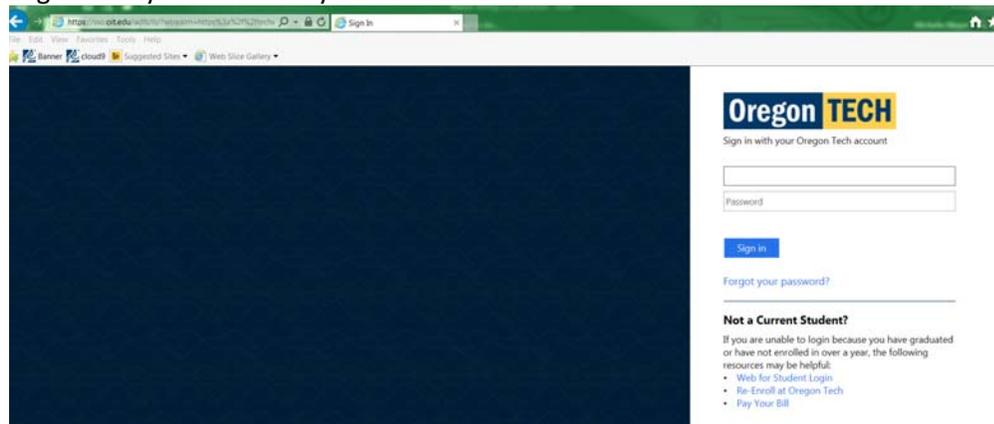
**(1) What Are We Approving:**

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

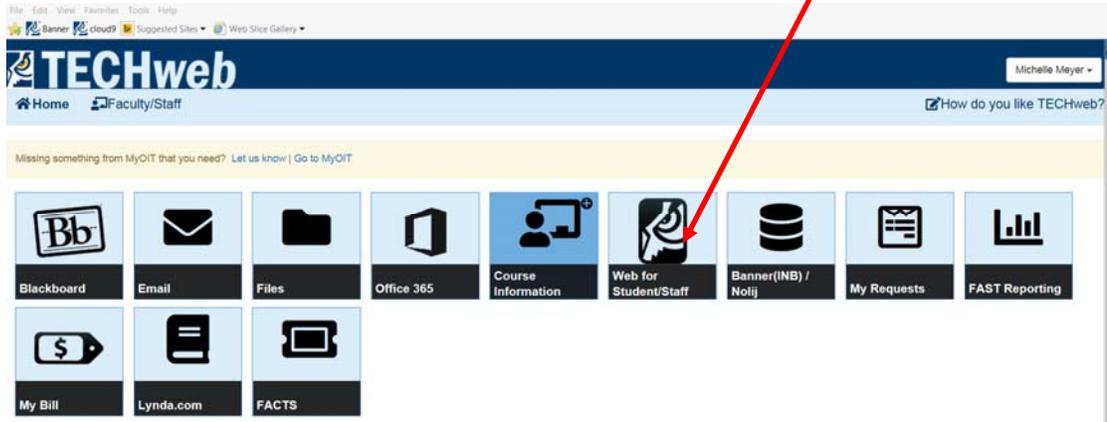
Banner FIS access and Budget Authority forms will need to be in place before Approval access can be granted. The BAO can help you complete the required forms and also help route for approval. Please contact the BAO at [FIS@OIT.edu](mailto:FIS@OIT.edu), or by phone at 541.885.1628.

**(2) How to Approve:**

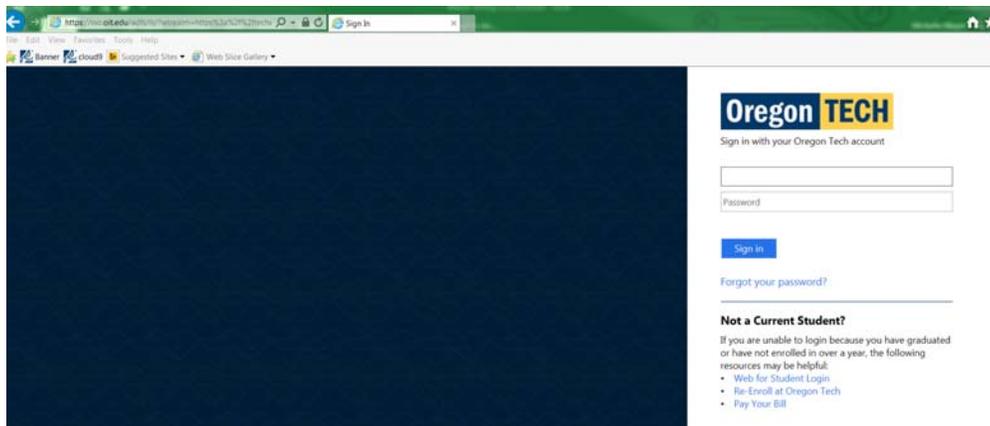
- MyOIT.edu can be found on the OIT homepage, or at:  
[https://my.oit.edu/layouts/MyOIT/Login.aspx?ReturnUrl=%2f\\_layouts%2fAuthenticate.aspx%3fSource%3d%252F&Source=%2F](https://my.oit.edu/layouts/MyOIT/Login.aspx?ReturnUrl=%2f_layouts%2fAuthenticate.aspx%3fSource%3d%252F&Source=%2F)
- Log-in to MyOIT.edu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



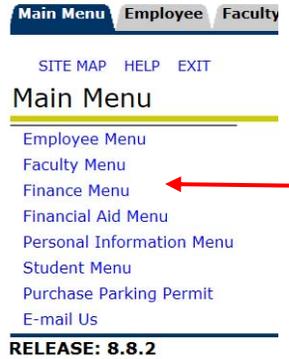
- Once logged-in, click the “Web for Student/Staff” icon in the middle-top portion of the page:



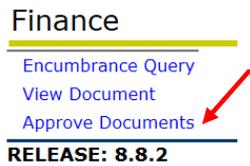
- You will be redirected to log-in a second time with your Oregon Tech account credentials:



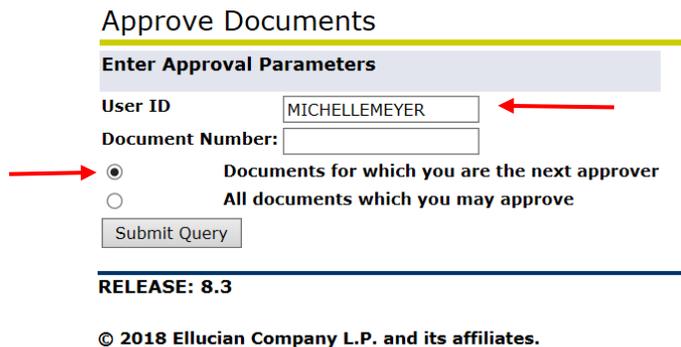
- A “Main Menu” screen will appear. Select “Finance Menu”:



- 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”:



- 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        | <a href="#">I0251409</a> | History | Approve | Disapprove |
| Y             | INV  | Y   |        |      | 0    | DIANAANGELI      | 22,701.97 | DOC        | <a href="#">I0251410</a> | History | Approve | Disapprove |
| Y             | INV  |     |        |      | 0    | MARYCHIVERS      | 97.35     | DOC        | <a href="#">I0251447</a> | History | Approve | Disapprove |
| Y             | INV  |     |        |      | 0    | MARYCHIVERS      | 452.03    | DOC        | <a href="#">I0251448</a> | History | Approve | Disapprove |
| Y             | INV  |     |        |      | 0    | MARYCHIVERS      | 750.00    | DOC        | <a href="#">I0251449</a> | 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**

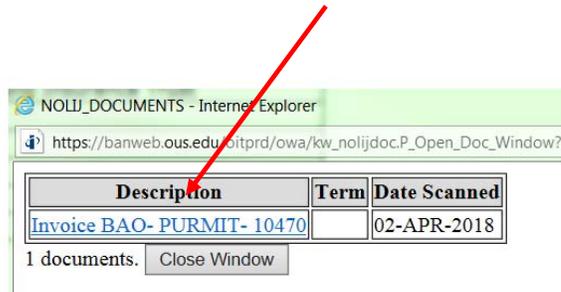
| Seq#                          | COA | FY | Index  | Fund   | Orgn   | Acct     | Prog  | Actv | Locn | Proj             |
|-------------------------------|-----|----|--------|--------|--------|----------|-------|------|------|------------------|
|                               |     |    | Bank   | NSFSus | 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:

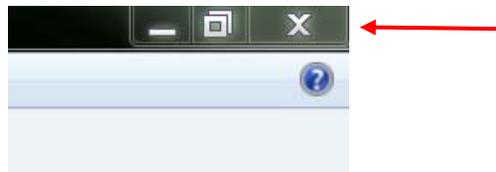
Nolij Documents

RELEASE: 8.5.0.4

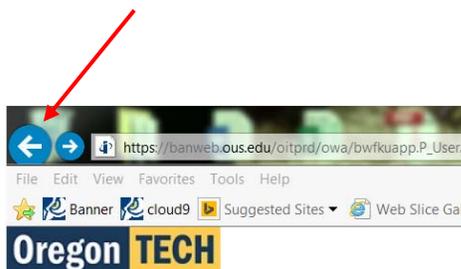
- A pop-up window will appear, click the blue link under “Description”:



- 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 Nolij 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.

Main Menu Employee Faculty Finance Financial Aid Person

BACK SITE MAP HELP EXIT

### 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](mailto:FIS@oit.edu), or by phone at 541.885.1628.

Thank you!

-Business Affairs Office