Budget and Requisition Approval in MYOakwood

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Login MyOakwood

Click on MYOakwood (see red arrow)
Login MyOakwood

Type in your User Name and Password
Access Employee Information

Click on the Tab “Employee Info”

Click on the “Staff” Title in the Left Column
Approving Requisitions

Click on “Item Approval”
Approving Requisitions

• Select “Item Approval” under the Staff Title on the Left.

• At bottom of Screen click “view more detail” This will give you more information about your requisition.

• Review your Requisition budget, description of items purchased and account number.

• Select box for requisitions to be approved.

• Click on the button below “Approve Selected Items” to approve requisition and erase them from your approval list.
### Approving Requisitions

(Display of Detail of Items)
GL Account Lookup

- Click “GL Account Lookup” under the Staff Title.
- Fill in your information and criteria.
- Full year or Period Range (July – Sept.)
- Full account number or Partial (just dept code; 3rd component)
- Select the year beginning the Fiscal year. Ex. Select 2012 for fiscal year 2012-2013.
- Begin Period (July is the first month of the Fiscal year)
- End Period (June would include the entire year)
- Click Go.
• Doesn’t this look Wonderful.
• See your Account Number, Account description displayed
• All Balances reflect the period specified in the previous menu.
• Unposted Balance for unposted or unapprove transactions.
• Posted Balance for Posted transactions.
• Encumbrance for Purchase Orders.
• Total Against the Budget includes Unposted Bal + Posted Bal + Encumbrance.
• Total Budget for period specified.
• Over/Under Budget includes Total Against Budget – Total Budget.
GL Account Lookup

Here are some of the things you can do in this screen:

- Print to your printer (right top corner)
- Double click on item underlined in the screen and a drop-down detail report will list the transactions that correlates to the total amount.
- Export budget to EXCEL (bottom left corner)
- Budget Bottom-Line (bottom right corner)
- Overbudget mean Total Against Budget is more than Total Period Budget. This is a “Negative Variance”.
- Refine or create a new search by clicking on the tabs at the bottom
Transaction Detail Example
WHAT’S COMING IN ACCOUNTING

• Payroll Automation  Nov. 1st – Be sure to sign-up for the training. (Oct. 23 )
• Accounting RPA Refresher Training  (Oct. 18, 22, 29)
  Sign-up at Distribution.
• All trainings will be in the BB&T Building bottom floor.
• You will be responsible for the information given at these training whether you attend or not. And please take time to view our Website and Financial Affairs Policy Manual.
ARE THERE ANY QUESTIONS?