



Requisition Process

Before starting the requisition process please review the Business Office Purchasing Policy and Procedures on Web Advisor.

1. Log into Web Advisor
2. Click on “Enter Requisition for goods and services” under Financial Information
3. Enter the Vendor ID Number or Vendor Name, select Vendor Name, click submit
 - a. If the vendor is not in the system, you will need to have the vendor complete a W-9. This will need to include the following:
 - i. Correct company name (the name the check will print to)
 - ii. Remit address (must include a 9 digit zip code)
 - iii. Federal Identification Number (FEI#)
 - iv. Signature
 - v. E-mail address
 - vi. Phone number
4. Once your vendor is selected you are ready to enter your requisition
 - a. If you need to review your budget at any time, select “View Budget”
5. **Requisition Date:** Enter the Requisition Date (today's date).
 - a. Per state statute a PO must be created prior to funds being obligated. The only circumstance where a PO will be back dated prior to invoice date will be due to year end closing.
6. **Vendor Name or ID Number:** This will be the vendor you selected on the first page. If you need the check to be mailed to another address please put the address in the printed comment box. (make sure to highlight when you turn PO back in)
7. **AP Type:** Please leave this blank.
8. **Item Department and Vendor Item:** Type the item description.
9. **Quantity and Unit of Issue:** Enter the amount you want to order and use the drop down box to select the correct unit of issue: each –ea, box, doz, etc.
10. **Price:** Enter the unit price for each item
11. **Cost Center:** Select the department you wish to purchase from
12. **Object Code:** The drop down box will list all state object codes that are set up for the department that you selected. If you do not see an object code that describes your item, please contact the Business Office and we can set the code up for you.
 - a. If the item is \$500 or more you must use a fixed asset object code. (these start with 54)
 - b. You only have 12 lines to enter items. If you need more, you will have to split the purchase order into 2 requisitions.
13. **Comments:**

- a. Use Printed Comments if you need to add comments for your vendor or special instructions for the Business Office (mail check to __, hold check for __)
 - b. Use Comments if you want to leave a message to the approvers or the Business Office. Comments do not appear on the purchase order.
 - i. Enter Comment to create Blanket PO if you need a Blanket PO
14. Submit the requisition once you are sure all information is correct. Corrections cannot be made on the web once a requisition is submitted. Any changes or deletions must be made by the Business Office at this point.
15. All requisitions require at least two approvers.
- a. Log in to WebAdvisor
 - b. Select 'Approve Documents' under 'Financial Information'
 - c. Click on the 'Approve' box to select the requisitions you wish to approve
 - d. Click on 'Submit'
 - e. It will then show a list of the requisitions that you approved
 - f. It will also inform you if there are additional approvals required
 - g. Any information that is **blue** or underlined can be selected to view details.

Steps following Requisition

1. The Business Office will process your requisition after it has been approved and e-mail the Purchase Order to the initiator.
2. After Items have been received or services rendered initiator must receive goods and services in Web Advisor.
 - a. From Main Menu select "Receive goods & services"
 - b. Enter quantity accepted on line corresponding to vendor and PO number
 - c. Then click submit
3. Turn PO with signed invoice into Business Office for payment. **Invoice must be issued from vendor and include the following:**
 - a. Address, must match W-9
 - b. Quantity
 - c. Description of item
 - d. Unit price
 - e. Total price of goods received
4. Absolutely no Oklahoma Sales Tax charges will be paid.