

WEST VIRGINIA
JOINT COMMITTEE ON GOVERNMENT AND FINANCE

PROCUREMENT PROCEDURES MANUAL



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General Information

Authority

The West Virginia Joint Committee on Government and Finance (Joint Committee) is exempt from state purchasing rules per WV Code 5A-3-1, therefore this manual contains the procedures and controls related to Procurement.

Purpose

The purpose of the Procurement Manual is to provide direction to Joint Committee staff for the operative procedures for the purchase of commodities and services.

Definitions/Terminology

ACT	wvOASIS document used to award an ARFQ or ARFP to a vendor. Vendors who have an ACT document for services in the system do not need to have an APO or ADO entered the system.
Bid	Anything that a vendor submits in response to a solicitation that constitutes an offer to the Joint Committee and includes, but is not limited to, documents submitted in response to a request for quotation, proposals submitted in response to a request for proposal, or proposals submitted in response to an expression of interest.
Buyer	An individual assigned by the Legislative Manager to order the items approved by the Legislative Manager. Buyers are normally also P-Card holders.
Commodity	Supplies, Materials, Equipment, and any other articles or things used by or furnished to a division of the Joint Committee.
Contract	An agreement between the Joint Committee and a vendor relating to the procurement of commodities or services or both.
Department	Name for a State Agency in wvOASIS it is interchangeable with agency.
Document Catalog	A central location in wvOASIS where documents can be generated and viewed.
Emergency Purchase	Purchase made when unforeseen circumstances arise, including delays by contractors, delays in transportation and unanticipated volume of work.
Master Agreement	wvOASIS procurement document which sets prices, terms and conditions, by which itemized goods or services can be purchased by agencies from a vendor at a specified price (previously known as a Statewide Contract).
MATA Table	wvOASIS Matching table – screen which shows the user a view of what has been received, invoiced, and paid against an ADO/APO/ACT. This screen also shows if a receiving report is required by the system prior to payment being processed.
Non-Reportable Assets	Commodities that are valued at less than \$1,000 or have a useful life of less than one year, or Assets expendable in nature. Examples of Non-Reportable Assets include: calculators, skids of paper, office supplies, etc.

Purchase Order (APO) or Delivery Order (ADO)	An electronic request in wvOASIS by a Requestor for the purchase of commodities and services. An ADO should be used when ordering from a Master Agreement the remainder of the time an APO will be used.
Receiver	An individual assigned by the Legislative Manager to receive items ordered by Joint Expenses and authorized to create RC Documents in wvOASIS.
Receiving Document (RC)	wvOASIS receiving report – document used to record the receipt of goods and services when they are received by the Joint Committee.
Receiving Search Page (RCSRCH)	Page which enables a user to search for APO, ADO, and ACTs that correspond to the goods and services received.
Reportable Assets	Means all equipment, vehicles, and other items, excluding expendable commodities as defined by Non-Reportable Assets, that has an original acquisition cost of \$1,000 or more and a useful life of one year or longer, except for the following: <ol style="list-style-type: none"> 1. Firearms regardless of cost; 2. All computers (including laptops, tablets, and central processing units); 3. All printers and other electronic devices with an acquisition cost of \$500 or more; and 4. Any other items determined by the Legislative Manager upon advice from Division Directors (GPS units, Portable PA systems).
Request for Proposals (ARFP)	A tool used to acquire professional and other services where the scope of work may not be well defined, and cost is not the sole factor in determining the award. All criteria by which the bidders will be evaluated must be contained within the bid document.
Request for Quotation (ARFQ)	A document, containing the specifications or scope of work and all contractual terms and conditions, which is used to solicit written bids. Conformity to specifications and price are the only factors used in the evaluation process.
Requestor	An individual assigned by the Legislative Manager to request items via wvOASIS.
Secondary Navigation Panel	Menu in wvOASIS which runs down the left-hand side of the screen, which allows the user to access different sections of a document.
Shopper (SHOP)	The Shopper (SHOP) page allows you to search multiple sources of supply for required items. You can choose the sources of supply that you want to search and enter search criteria for the selected sources of supply. You can then select items from the returned search results and add them to your Shopping Cart. If you log out of wvOASIS the items will remain in your Shopping Cart until purchased or until you remove them from the Shopping Cart Page
Shopping Cart	The Shopping Cart page displays the items that were added to the Shopping Cart from the Shopper (SHOP) page.

Stringing	Issuing a series of purchase orders or dividing or planning procurements to circumvent the various bidding thresholds.
Unit	Name for an individual Joint Committee Division in wvOASIS.
Vendor Code	The unique identifier assigned to the vendor by wvOASIS.
WV-96	Addendum to Vendor's Standard Contractual Forms – document which can be utilized to counter a vendor's submission of alternate terms and conditions. It should only be used after it is clear from the vendor's bid/quote that alternate terms and conditions have been proposed.

Additional Information

Office supplies, Equipment, Postage, duplicating facilities, etc., are to be used only for office business. Employees should not use these supplies and facilities for personal purposes.

Employees should refer to the Joint Committee Anti-Fraud Policy for reporting potential fraud or fraudulent activity to the appropriate persons.

Bidding Process

Determining the exact requirements for a commodity to perform a specific function is one of the most important tasks in the procurement process. The Division must take into consideration the problem to be resolved and what alternatives or options are available to satisfy the need.

The division should always consider any administrative lead time (time to prepare documents, solicit bids, evaluate bids and make a contract award) and delivery lead time (time for the vendor to deliver commodities or services) when preparing a procurement document.

Competitive bids must be obtained as follows:

1. Purchases \$2,500 and less: Competitive bids are not required but are encouraged when possible.
2. Purchases \$2,500.01 to \$10,000: A minimum of three (3) verbal bids are required, when possible, and the lowest bid meeting specifications must be awarded the purchase order/contract. A verbal bid form should be completed to document bids
3. Purchases over \$10,000: A minimum of three (3) written bids are required, when possible, and the lowest bid meeting specifications must be awarded the purchase order/contract.

A Request for Quotation (ARFQ) should be used to acquire all tangible property (e.g. equipment, supplies, etc.) over \$10,000. The ARFQ should contain at least the following:

1. Detailed description of, or specification for, the items being purchased;
2. Delivery date, if required;
3. Bid price per unit of the item(s);
4. Any applicable maintenance; and
5. Quantities of all items.

A Request for Proposal (ARFP) should be used for projects requiring a technical component in addition to a cost component for evaluation of bids. e.g.) Legislative Printing machines; DOH Highways Financial Audit.

Please remember the following rules regarding acceptable bids:

1. A “no bid” is considered a bid.
2. Screen prints from Internet sites in which the commodity or service is for sale and may be procured are acceptable as a valid verbal bid.
3. Screen prints from Internet sites in which the commodity or service is for sale are **not** acceptable as a valid written bid.

Both RFQs and RFPs should be entered in wvOASIS using either an ARFQ or ARFP document. (See: Appendix 1: Preparing an ARFQ or ARFP for instructions on entering these types of transactions in wvOASIS). For additional help on preparing ARFQ and ARFP please contact the Fiscal Office.

The following types of commodities and services are exempt from competitive bidding:

1. Advertising – includes any advertisement placed directly with newspapers, trade magazines, internet publications, social media or billboards. It also includes broadcast television and radio advertisements placed directly with the broadcaster or publisher;
2. Artwork and Historical Items – includes the purchase of and service to artwork and historical items;
3. Hospitality – includes expenses for food, beverages, facility rental and entertainment relating to conducting state business;
4. Professional Association Dues – includes membership fees or association dues for professional associations that perform a licensing, certification, or accreditation function for state employees or agencies (i.e., West Virginia State Bar, West Virginia Board of Accountancy, NCSL, etc.); and
5. Training Activities – includes lecturers, honorariums, copyrighted test and training materials, test monitors/examination proctors, registration fees, etc., where competition is not available.

Contracts/Service Agreement/Software Licenses

Any Contracts/Service Agreements/Software Licenses shall have a standard initial contract term of one year, with the renewal period being determined by the Legislative

Manager with input from Legislative Services. Once the contract has been approved by the Legislative Manager, or his designee, either the Fiscal Office or Office of Administration will enter the renewal date on the Contract calendar. Subsequent renewals shall be entered by the Division. Legislative Services shall review all contract/service agreement/software licenses renewals.

Ordering Commodities and Services

The Legislative Manager/Division Director will designate an individual for each Division as a Requestor. All requests for commodities or services must be entered in wvOASIS except for the following:

1. Leasing of office/meeting space;
2. Employee related travel;
3. Services provided by another state agency; and
4. Utility payments (cable, phone, etc.).
5. Legislative Association Dues and Membership Fees

The vendor must be registered with the State of West Virginia prior to the commodity or service being ordered. If the vendor is not registered in wvOASIS or if a Prevent New Orders error is received, the Requestor should contact the Fiscal Office to determine what actions need to be taken.

The Requestor will enter either an ADO or APO in wvOASIS. An ADO should be utilized when ordering from a Master Agreement. All other orders should be entered using an APO. (See Appendix 2: Preparing an ADO or Appendix 3: Preparing an APO for instructions on entering these documents in wvOASIS).

Once the ADO/APO has been submitted, the document will be reviewed by the Fiscal Office to verify funding is available and appropriate, before being approved by the Legislative Manager. Upon the Legislative Manager's approval, the document goes to a Status of Final and an electronic PDF purchase order will be available for the Requestor.

The Requestor is responsible for monitoring the status of their ADO/APOs. (See Appendix 8: Checking Documents and Printing Forms). If the item is to be paid with a P-Card a copy of the ADO/APO should be sent to the P-Card Holder. If an item is not available at the time the Buyer places the order with the Vendor, then the Buyer should notify the Requestor. If the item is to be paid with a P-Card, a copy of the ADO/APO should be sent to the P-Card Holder. **Note: Commodities and/or services cannot be ordered from the vendor without approval from the Legislative Manager.**

Verbal approval can be obtained for emergency purchases and should be documented in the Document Description on the ADO/APO. If the Legislative Manager is unavailable the Director of Administration and Director of Legislative Services will serve as backups for approving these documents.

Office Supplies

ADO's/APO's for office supplies, unless it is an emergency purchase, should be submitted no more frequently than once a week.

Requestors should review the catalog attached to the Master Agreement for Office Supplies to determine if ordering from the Master Agreement will obtain a lower cost. The Master Agreement can be located on the Purchasing Division Agency Resource Page and a view only copy of the catalog for the current vendor can be located as follows: Navigate to www.business.officedepot.com and use Login Name "westvirginiabrowse" (without quotes) and Password "Welcome1" (without quotes).

Receiving

The Legislative Manager will designate individuals as Receivers. There are nine shipping locations (receiving areas) for Joint Committee (See Table 1).

Receivers will check that items received match packing slip and purchase order then receive the items in wvOASIS using a RC Document. Only items with commodity codes which begin with the digits 1 through 6 are required to have a receiving report prepared (See Appendix 4: Receiving Goods).

If a Reportable Asset is received the Receiver should follow the procedures in the Asset Management Manual and barcode the item prior to it leaving the Receiver's possession.

If the item was paid with a P-Card, a copy of the receiving report needs to be provided to the P-Card Holder.

Table 1: Receiving Locations

Location Code	Name
SP2071	Joint Committee on Govt & Finance (East Wing Rm E132)
SP2072	Joint Committee on Govt & Finance LASD (MB37)
SP2073	Joint Committee on Govt & Finance Duplicating (MB26)
SP2074	Joint Committee on Govt & Finance – West Wing Dock
SP2075	Commission on Special Investigations
SP2605	Joint Committee on Govt & Finance Post Audit (W329)
SP2606	Legislative Claims Commission (W334)
SP2607	Joint Committee on Govt & Finance Public Information (MB27)
SP2608	Joint Committee on Govt & Finance PERD (W314)

Appendix 1: Preparing an ARFQ or ARFP

1. Log into wvOASIS Financial and type “ARFQ” for a Request for Quotation or “ARFP” for a Request for Proposal in the Jump To Box.
2. Enter “2300” in the Dept and the appropriate Unit in the respective boxes (See Table 2 in Appendix 7 for listing of Units). Then click Create.

The screenshot shows the wvOASIS Document Catalog interface. The user is logged in as Londa Sabatino. The 'Jump to' box contains 'ARFQ'. The 'Document Identifier' section has the following fields: Code: ARFQ, Unit: 5485, Dept.: 2300, and ID: (empty). A 'Create' button is visible at the top left of the form area.

3. In the ID Box type LEG, check the Auto Numbering option and then click Create to create a new ARFQ.

The screenshot shows the wvOASIS Document Catalog interface. The user is logged in as Londa Sabatino. The 'Jump to' box contains 'ARFQ'. The 'Document Identifier' section has the following fields: Code: ARFQ, Unit: 5485, Dept.: 2300, and ID: LEG. The 'Other Options' section has the following fields: Auto Numbering: , and Create Template: . A 'Create' button is visible at the bottom left of the form area.

4. Use the Secondary Navigation Panel to move between the various sections of the ARFQ or ARFP. On the Header Section complete the following:

Document Navigator

- Header
- Schedule of Events
- Terms and Conditions
- Commodity Group
- Commodity
- Commodity T & C
- Evaluation Criteria Group
- Evaluation Criteria Line
- Vendor List
- Free Form Vendor
- Vendor Rotation
- Commodity E-mail Push
- Publishing
- Supporting Documents

Header List View

General Information | Contact | Templates | Add Templates | Reference Documents | Document Information

Additional Information

Record Date:

Document Description: example for training

Vendor List Restricted Responses?:

Prohibit Online Responses:

Bid Receiving Location: BR0147

Attention: PROCUREMENT OFFICER

JOINT COMMITTEE ON GOVT FINANCE

BLDG 1 RM 132E

1900 KANAWHA BLVD E

CHARLESTON

WV

25305

US

Procurement Folder:

Procurement Type ID: 16

Procurement Type: Agency Master Agreement

Default Form:

Solicitation Category:

[Browse](#) [Clear](#)

Procurement Location:

Location Name:

City:

Attention:

Address 1:

Department: 2300

Procurement Location	Attention	Location Name
Select BR0147	PROCUREMENT OFFICER	JOINT COMMITTEE ON GOVT FINANCE
Select BR0223	LEGISLATIVE AUDITOR POST AUDIT DIVISION	JOINT COMMITTEE ON GOVT FINANCE

[Cancel](#) [First](#) [Previous](#) [Next](#) [Last](#)

[Save](#) [Undo](#) [Load Vendor List](#) [Load T and C](#) [Assemble Document](#) [Reset Buyer](#) [View Assembly Reques](#)

- A. General Information Tab complete the following:
 - 1) Document Description – short description of commodities/services needed.
 - 2) Bid Receiving Location – use the Pick List to choose the Bid Receiving Location – Type 2300 in the Department Box then click Browse, then select the appropriate location (Either Post Audit or Fiscal Office).
 - 3) Procurement Type ID – use the Pick List to choose the Procurement Type, most will be either 16 or 18.
 - 4) Click Save to auto populate the remaining fields.

B. Contact Tab complete the following:

- 1) Requestor ID – most of the time will be same as the Issuer ID, however if a Requestor can enter for multiple divisions, the Requestor ID should be the ID of the Division’s assigned Requestor.
- 2) Buyer – use the Pick List to choose the Buyer (either the P-Card Holder or Fiscal Office) See Table 3 in Appendix 7 for a list of P-Card IDs or use sabatinol for the Fiscal Office.
- 3) Click Save to have the remaining fields auto populated.

5. On the Terms and Conditions Section - insert a new line and enter BLANK in the T & C box. Then click Save.

6. On the Commodity Section complete the following: Note: You will need to repeat these steps for each type of item being ordered - e.g. buying a digital copier with a maintenance agreement would have two lines, one for the copier (as an Item) and one for the maintenance agreement (as a Service).

The screenshot shows a software interface for managing commodity lines. On the left is a 'Document Navigator' with a tree view including 'Header', 'Schedule of Events', 'Terms and Conditions', 'Commodity Group', 'Commodity', 'Commodity T & C', 'Evaluation Criteria Group', 'Evaluation Criteria Line', 'Vendor List', 'Free Form Vendor', 'Vendor Rotation', 'Commodity E-mail Push', 'Publishing', and 'Supporting Documents'. The 'Commodity' section is selected.

The main window displays a table with the following data:

Line	CL Description	Line Amount	Inactive Line	AttachmentList
1	laptops	\$3,600.00	No	

Below the table is a 'General Information' tab with the following fields:

- CL Description:** laptops
- Commodity:** 43211500 (with a pick list icon)
- Line Type:** Item (dropdown menu)
- Quantity:** 4.00000
- Unit:** EA (with a pick list icon)
- Unit Price:** \$900.00
- Contract Amount:** (empty field)
- Service From:** (empty field with calendar icon)
- Service To:** (empty field with calendar icon)
- Catalog:** (empty field)
- Effective From:** (empty field with calendar icon)
- Effective To:** (empty field with calendar icon)
- Inactive Line:**
- Lock Order Specs:** No (dropdown menu)
- Commodity Specs:** A computer is a device that accepts information (in the digital data) and manipulates some result based on a pr...
- Ext Description:** (empty field)
- Line Amount:** \$3,600.00
- Award Date:** (empty field)

At the bottom of the window are buttons for 'Save', 'Undo', 'Insert New Line', 'Insert Copied Line', 'Edit with Grid', and 'Load T & C'. There is also an 'Additional Ex' button partially visible.

- A. General Information Tab, complete the following:
- 1) Insert a New Line and enter a description of the item requested in the CL Description.
 - 2) Commodity – use the Pick List to search for and select an appropriate commodity code (Note: This code will determine which vendors are notified via Vendor Self Service on available solicitations). For your convenience, Appendix 6 has a list of Common Commodity Codes.
 - 3) Choose a Line Type – use Item if physical items will be received, otherwise use Service.
 - 4) Enter the quantity wanted (if Line Type is Service enter 1).
 - 5) Unit – use Pick List to choose unit of measure (most common is EA).
 - 6) Unit Price – enter anticipated cost per unit (only if Line Type is Item).
 - 7) Contract Amount – enter anticipated amount (only if Line Type is Service.)
 - 8) Enter an estimated unit price (can be used to help determine extravagant bids).
 - 9) Click Save.

The screenshot shows a software interface with a 'Document Navigator' on the left and a main content area. The main content area is titled 'Commodity' and shows a table with one line item: 'laptops' with a line amount of \$3,600.00. Below the table, there are tabs for 'General Information', 'Reference', 'Shipping/Billing', 'Specifications', 'Templates', and 'Add Templates'. The 'Shipping/Billing' tab is active, showing 'Shipping Location: SP2072' and 'Billing Location: BL0432'. Below these, there are two columns of text for 'Attention' details, including 'RECEIVER FOR LEGISLATIVE AUTOMATED SYSTEMS DIVISION' and 'FISCAL OFFICE'. At the bottom, there are two 'Additional Info' text boxes.

B. Shipping/Billing Tab complete the following:

- 1) Shipping Location – enter the Shipping Location Code;
- 2) Billing Location – enter the Billing Location Code; and
- 3) Click Save.

C. If needed, additional information can be provided on the Specifications Tab regarding manufacturer, specifications of the items. Remember, if using a brand name make sure to use “or equivalent”.

7. On the Free Form Vendor Section, you can add a new line and enter the name and email for specific vendors you want the solicitation sent to. **Important – make sure to include your email and name in this section so you receive notification when the RFQ publishes.**
8. The Commodity E-mail Push Section shows all commodity codes in VSS that the solicitation will be sent to. Vendors who have registered with the state to receive electronic notifications based on commodity codes will automatically receive a notification upon publishing of the RFQ.

Document Navigator		Publishing	
Header	Procurement Folder: 497766	Create Vendor Notification:	<input checked="" type="checkbox"/>
Schedule of Events	Amendment Number:	Schedule of Events:	<input checked="" type="checkbox"/>
Terms and Conditions	Published Date:	Terms and Conditions:	<input checked="" type="checkbox"/>
Commodity Group	Published Time:	Evaluation Criteria:	<input checked="" type="checkbox"/>
Commodity	Let Date: 09/22/2018	Evaluation Criteria (Points):	<input type="checkbox"/>
Commodity T & C	Close Date: 09/25/2018	Amendment History:	<input checked="" type="checkbox"/>
Evaluation Criteria Group	Close Time: 22:30	Document Attachments:	<input checked="" type="checkbox"/>
Evaluation Criteria Line	Public Bid Opening Date:	Publish Vendor List:	<input type="checkbox"/>
Vendor List	Public Bid Opening Time:	Only Notify Vendor List:	<input type="checkbox"/>
Free Form Vendor		Commodity Description:	<input checked="" type="checkbox"/>
Vendor Rotation		Item Shipping:	<input checked="" type="checkbox"/>
Commodity E-mail Push		Item Specifications (Handling):	<input checked="" type="checkbox"/>
Publishing		Item Specifications (Details):	<input checked="" type="checkbox"/>
Supporting Documents		Commodity Terms and Conditions:	<input checked="" type="checkbox"/>
		Commodity Attachments:	<input checked="" type="checkbox"/>
		Prohibit Online Responses:	<input checked="" type="checkbox"/>

9. On the Publishing Section complete the following:
- Let Date – Date you want the RFQ to be published in VSS.
 - Close Date – Date bids must be received by.
 - Close Time – Time bids must be received by (recorded as military time e.g. 16:30 instead of 4:30 – best practice is to have the closing time end at the bottom of an hour).
 - Prohibit Online Responses – by checking this box you will not allow any Vendors to electronically submit bids through VSS.
 - Things to remember on Publishing to VSS:
 - Set the date to a future date to allow time for the Legislative Manager’s approval.
 - VSS interfaces with the Financial at the bottom of each hour from 7:30 am – 5:30 pm.

10. Return to the Header Section and attach any documents which you want sent with the Request (bid instructions, evaluation criteria, terms and conditions, etc.). **Only items attached to the header will be included in the electronic file.**

11. Click Validate. Once you get the document validated successfully message, click Assemble Request. Then click Submit Assemble Request.

The screenshot displays the 'Header' section of a software application. On the left is a 'Document Navigator' with a list of menu items including 'Header', 'Schedule of Events', 'Terms and Conditions', 'Commodity Group', 'Commodity', 'Commodity T & C', 'Evaluation Criteria Group', 'Evaluation Criteria Line', 'Vendor List', 'Free Form Vendor', 'Vendor Rotation', and 'Commodity E-mail Push'. The main area shows the 'Header' details with a 'General Information' tab selected. A dropdown menu is open, showing two options: 'ARFQ_FORM Agency Request For Quotation Form' (checked) and 'CRFQ_FORM Request for Quotes (PDF Format)'. Below the menu, there are input fields for 'Application Resource ID' (value: ARFQ), 'Print Job Code' (value: ARFQ_FORM), 'Print Job Name' (value: Agency Request For Quotation Form), and 'Print Job Description' (value: Agency Request For Quotation Form). A 'Submit Assemble Request' button is highlighted with a yellow box and a red '2'. Below this is the 'Assemble Request' section, which includes a table with the following data:

Request Id	Job Id	User Id	Start Time	End Time	Status	Message
✓ 301283	1102013	sabatinol	09-21-2018 15:34:20	09-21-2018 15:35:02	Successful	Assembly job complete

Below the table, there is a 'View Job Log Messages' link. At the bottom of the interface, there are several buttons: 'Save', 'Undo', 'Load Vendor List', 'Load T and C', 'Assemble Document' (highlighted with a yellow box and a red '1'), 'Reset Buyer', 'Copy', 'Validate', 'Submit', 'Discard', and 'Print'. A 'Refresh' button is also visible in the 'Assemble Request' section, highlighted with a yellow box and a red '3'.

12. Click Refresh until you get a Status of Successful. If you get a Failed Status, contact the Fiscal Office. Then click Back.

13. Then click Submit to send the ARFQ or ARFP for approval. The ARFQ or ARFP will not publish until after it has been approved by the Legislative Manager or his designee (Director of Administration or Legislative Services Director).

Appendix 2: Preparing an ADO

(Used for Iron Mountain, Office Depot, ARI, and other AMA/CMA contracts).

1. In the Jump To Box type SHOP. Then click Go or hit Enter.
2. Narrow Check Sources of Supply to only MA Catalog Items and Master Agreements
3. To locate the relevant catalog, type the first part of the vendor name or a keyword in the Search For along with the (%) wildcard. The wildcard should be used between words as well as at the end and beginning of the phrase. Wildcards are not needed if only a single word is used in the Search For. The click Search. Note: Appendix 5 contains a list of frequently used vendors.
4. Enter the quantity on the line showing the contract/item you want to order. For office supplies enter a quantity of 1. Then click Add to Cart.

The screenshot shows the SIS Shopper interface. At the top, there is a navigation bar with 'Jump to: SHOP' and 'Go' button. Below that, there are tabs for 'Procurement', 'Budgeting', 'Accounts Receivable', and 'Accounts Payable'. The main content area is titled 'Shopper' and contains a shopping cart icon with '0 Items : \$0.00' and buttons for 'Edit Shopping Cart' and 'Proceed to Checkout'.

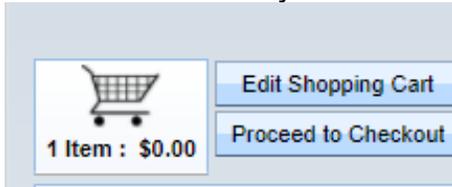
The search section includes 'Check Sources of Supply' with checkboxes for 'Select All or check Sources to be searched:', 'Inventory', 'MA Catalog Items' (checked), 'Master Agreements' (checked), 'Similar Purchases', and 'Commodities'. The 'Advanced Search' section has a search box containing '%OFFICE SUPP%' and fields for 'Department', 'Warehouse', 'Commodity', 'Expiration Date', 'Vendor', 'Part Number', 'Price (from)', and 'Price (to)'. There are also checkboxes for 'Include Expired Agreements', 'Mandatory Source Enabled', and 'Include Substitute Stock Items', and a 'Document Description' field.

Below the search section, there is a table titled 'Available From Master Agreements' with columns: 'Vend Line', 'Comm Line', 'Mandatory Source', 'Quantity', 'SC Amount', 'Unit', 'Unit Price', 'Commodity Code', 'CL Description', and 'Description'. The table contains three rows of results:

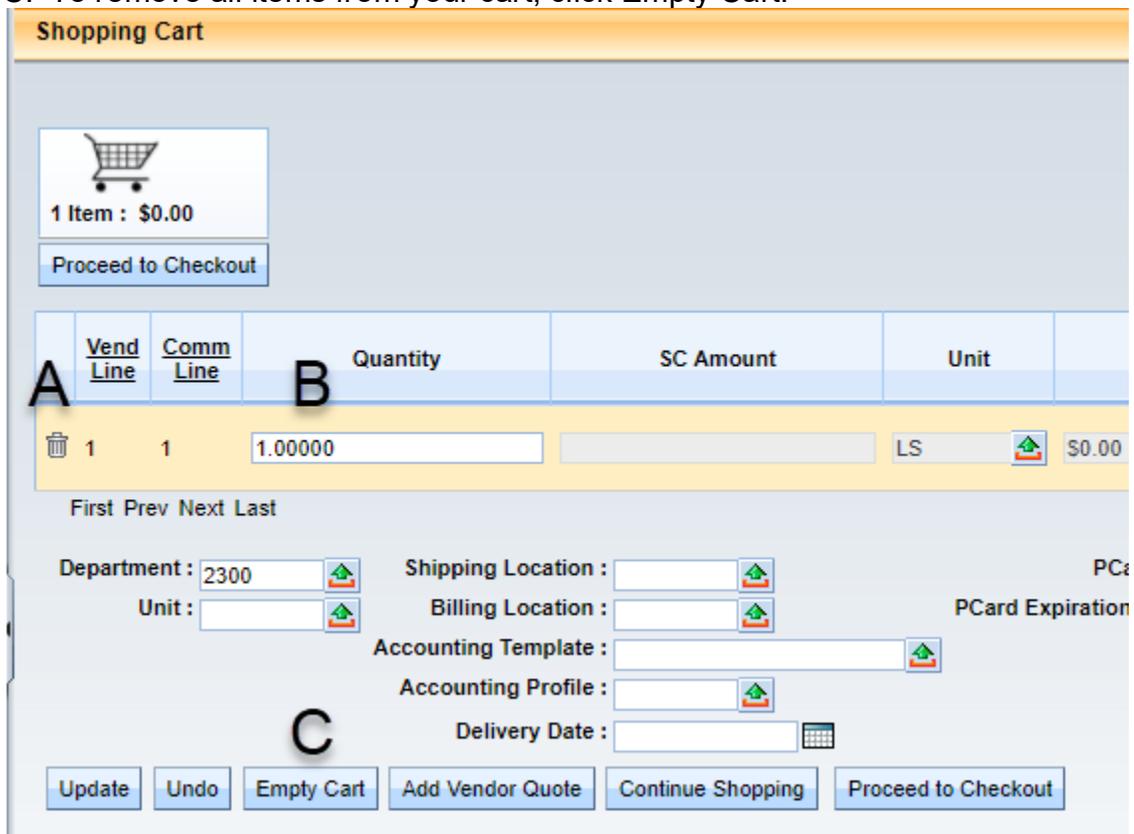
Vend Line	Comm Line	Mandatory Source	Quantity	SC Amount	Unit	Unit Price	Commodity Code	CL Description	Description
1	1	No			EA	\$35.00	44120000	POSTAGE METER LEASE	Office supplies
1	2	No			EA	\$0.00	44120000	Supplies	Office supplies
1	1	No	1		LS	\$0.00	44120000	Office supplies	Office supplies

At the bottom of the table, there are navigation buttons: 'First', 'Prev', 'Next', 'Last', and 'Add to Cart'. A red arrow points to the 'Add to Cart' button.

- The Shopping Cart will update to include the number of line items selected and total dollar amount of the items selected for the order. The items added to your cart will remain in the cart until you discard them or Checkout.



- Once you have added the items to your cart select Edit Shopping Cart if you need to make changes to the Quantities ordered or to remove specific lines.
 - To remove a single item from the Shopping Cart, click the trashcan icon at the beginning of the item line.
 - To update quantity ordered type the new quantity in the Quantity box.
 - To remove all items from your cart, click Empty Cart.



- If no changes need to be made and you are ready to Checkout click Proceed to Checkout.

8. On the Checkout Screen enter the following and click Checkout to create the ADO:
 - A. Unit number (see Table 2 in Appendix 7 for a list of Units);
 - B. LEG in the ID box;
 - C. Shipping Location – enter Shipping Location Code (see Table 1 on page 8);
 - D. Billing Location – CSI use BL0433 all other offices use BL0432;
 - E. Accounting Template - Record the Template code for the division requesting the items (Note: Computer equipment will always be LASD) (See Table 2 in Appendix 7 for listing);
 - F. Accounting Profile – will always be JCGF;
 - G. Delivery Date – when you need the supplies by; and
 - H. PCard ID - Use the pick list to choose the appropriate P-Card Holder or see Table 3 in Appendix 7 for a list of cardholders and divisions served.

Checkout



1 Item : \$0.00

▼ Document Identifier

Code : <input type="text" value="ADO"/>	Department : <input type="text" value="2300"/>	ID : <input type="text" value="LEG"/>	
	Unit : <input type="text" value="5485"/>	Auto Numbering : <input checked="" type="checkbox"/>	

▼ Additional Information

Shipping Location : <input type="text" value="SP2071"/>	Accounting Template : <input type="text" value="LMFD"/>	PCard ID : <input type="text"/>
Billing Location : <input type="text" value="BL0432"/>	Accounting Profile : <input type="text" value="JCGF"/>	PCard Expiration Date : <input type="text"/>
	Delivery Date : <input type="text" value="09/25/2020"/>	Group Purchases By : <input type="text" value="Allow System to Choose Grouping"/>

9. The system generates a new Agency Delivery Order (ADO). To finish preparing the order, complete the following:

A. Header Section

The screenshot displays the MOASIS system interface for an Agency Delivery Order (ADO). The header section is visible, showing the 'General Information' tab selected. The form includes fields for Document Name, Record Date, Budget FY, Fiscal Year, Period, Document Description, and various financial amounts (Actual, Closed, Open). It also features fields for Procurement Type ID, Default Form, and other administrative details. The interface is user-friendly with clear labels and input fields.

- 1) On the General Information Tab (shown above):
 - a. Document Name – a short description.
 - b. Document Description – same as document name.
 - c. Procurement Type ID – must be 12.
 - d. Default Form – set to WV_ADO_Form (click Pick List)
- 2) Click Save.

Agency Delivery Order(ADO) Dept: 2300 ID: LEG1900000004 Ver.: 1 Function: New Phase: Draft Modified by sabatinol , 09/19/2018

Header

General Information | Contract Details | Reference | **Requestor Issuer Buyer** | Modification | Extended Description | Default Shipping/Billing | Reporting

Fixed Asset Intent Reference | Document Information

Issuer ID: sabatinol
 Londa Sabatino
 (304) 347-4860
 londa.sabatino@wvlegislature.gov

Requestor ID: [Redacted]

Name: [Redacted]
 Email: [Redacted]
 Phone Number: [Redacted]
 Requesting Dept: [Redacted]

Buyer Team:
Buyer: [Redacted]
 Award Officer Name: [Redacted]
 Award Officer Phone Number: [Redacted]
 Award Officer Phone Extension: [Redacted]
 Award Officer Email: [Redacted]

- 3) On the Requestor Issuer Buyer Tab:
 - a. Requestor ID – normally same as Issuer Id.
 - b. Buyer ID – if paying by a P-Card use the Pick List to select the cardholder or see Table 3 in Appendix 7 for a a list of P-Card Holder Id's, otherwise enter sabatinol for the Fiscal Office.

- 4) Click Save.

Agency Delivery Order(ADO) Dept: 2300 ID: LEG1900000004 Ver.: 1 Function: New Phase: Draft Modified by sabatinol , 09/19/2018

Header

General Information Contract Details Reference Requestor Issuer Buyer Modification Extended Description **Default Shipping/Billing** Reporting

Fixed Asset Intent Reference Document Information

Shipping Location: SP2071 Billing Location: BL0432

JOINT COMMITTEE ON GOVT & FINANCE JOINT COMMITTEE ON GOVT & FINANCE
 RECEIVING CLERK FISCAL OFFICE
 BLDG 1 RM 132E BLDG 1, RM 132E
 1900 KANAWHA BLVD E 1900 KANAWHA BLVD E
 CHARLESTON CHARLESTON
 WV WV
 25305 25305
 US US

Shipping Method: 01 Best Way
 Free On Board: 5 FOB Dest, Freight Prepaid
 Delivery Date:

Shipping Additional Info: Billing Additional Info:

Ship/Bill To Lines
 Load Accounting Profile
 Assemble Document
 Reset Buyer
 Assemble Request Activity
 View Procurement Folder

Save Undo Related Actions

Accounting Distribution	Total Lines: 0	Line: none	Distribution %: none
Vendor	Vendor Customer: 000000126524	Legal Name: IRON MOUNTAIN INCORPORATED	
Commodity	Total Lines: 10+	Line: 1	Commodity: 78131804 Open Amount: 0.00 Line Amount: \$0.00
Accounting	Total Lines: 0	Line: none	Line Amount: none Line Open Amount: none
Posting	Total Lines: 0	Posting Line: none	
Special Instructions	Total Lines: 0	Special Instruction Line: none	Special Instructions Code: none
Supporting Documents	Total Lines: 0	Line Number: none	File Name: none

Copy Validate Submit Discard Processing Workflow File Close

5) On the Default Shipping/Billing tab: verify the shipping and billing locations have prefilled

6) Check the Vendor Section for any discounts.

B. Commodity Section

Note: The following steps will have to be repeated for each commodity line listed. To move to another line, click on the next line listed.

Commodity Total Lines: 1 Line: 1 Commodity: 44120000 Open Amount: \$0.00 Line Amount: \$0.00

Line	CL Description	Line Amount	Open Amount	Closed Amount	Modified
1	Office supplies	\$0.00	\$0.00	\$0.00	No

From 1 to 1 Total: 1

General Information Reference Shipping/Billing Fixed Asset Intent Reference Specifications Matching Retainage Tolerance

Discount

CL Description: Office supplies

Warehouse: []

Commodity: 44120000

Office supplies

Stock Item Suffix: []

Supplier Part Number: []

Line Type: Item

Quantity: 1.00000

Unit: LS

Unit Price: \$0.00

Discounted Unit Price: \$0.00

List Price: \$0.00

Contract Amount: \$0.00

Service From: []

Service To: []

Accounting Profile: JCGF

Accounting Template: LMFD

Tax Profile: NOTAX

Leased Item:

External Warehouse: []

Fixed Asset:

Lock Order Specs:

Lock Catalog List Price: []

Allow Promotional Pricing:

Vendor Preference Level: 99

Inactive Line:

Shipping Charge:

Commodity Specs: []

Extended Description: []

Non-Reserved Funding
Open Amount Total:
Item Sub Total: \$0.00
Tax Amount: \$0.00
Line Amount: \$0.00
Total Acctg Amt: \$0.00
Closed Amount: \$0.00
Open Amount: \$0.00
Open Accrual Amount: \$0.00

Save Undo Insert New Line Insert Copied Line Edit with Grid

1) General Information Tab:

1. CL Description – leave as is unless you are ordering Office Supplies then change to a description of the item ordered
2. Enter the Supplier Part Number or Item Number from suppliers' catalog if available (required for office supplies)
3. Update the Quantity
4. For Office Supplies also update Unit Price
5. If item is a Service, record total cost in the Contract Amount.
6. Service From – today's date.

7. Service To: - Future date (when you would like items by).
 8. If you need additional room for more information/special instructions use the Extended Description Field
- 2) Click Save.
 - 3) Verify the Shipping/Billing auto inferred from Header.
 - 4) Click Save.

C. Accounting Section

Note: The following steps will have to be repeated for each commodity line listed. To move to another line, click on the next line listed.

Accounting				
Total Lines: 0		Line: none	Line Amount: none	Line Open Amount: none
Line	Line Amount	Line Closed Amount	Line Open Amount	Modified
From 0 to 0 Total: 0				
First Previous Next Last				
General Information Reference Fixed Asset Intent Reference Fund Accounting Detail Accounting Payment Details				
Event Type:	<input type="text"/>	Budget FY:	<input type="text"/>	
Accounting Template:	<input type="text"/>	Fiscal Year:	<input type="text"/>	
Line Description:	<input type="text"/>	Period:	<input type="text"/>	
Line Amount:	<input type="text"/>	Freight %:	<input type="text"/>	
Reserved Funding:	<input type="text"/>	Modified:	<input type="text"/>	
Line Closed Amount:	<input type="text"/>	Number of Attachments:	<input type="text"/>	
Line Closed Date:	<input type="text"/>	Outyear Adjustments Amount:	<input type="text"/>	
Line Open Amount:	<input type="text"/>	Obligation Amt Adjusted for Outyear:	<input type="text"/>	
Roll Indication 1: <input type="checkbox"/>		Related Accounting Line:	<input type="text"/>	
Roll Indication 2: <input type="checkbox"/>				
Insert New Line Insert Copied Line Edit with Grid				
Posting		Total Lines: 0	Posting Line: none	
Special Instructions		Total Lines: 0	Special Instruction Line: none	Special Instructions Code: none
Supporting Documents		Total Lines: 0	Line Number: none	File Name: none
<input type="button" value="Copy"/>	<input type="button" value="Validate"/>	<input type="button" value="Submit"/>	<input type="button" value="Discard"/>	<input type="button" value="Processing"/> <input type="button" value="Workflow"/> <input type="button" value="F"/>

1. On the General Information Tab complete the following:
 - a. Click Insert New Line, then click Save.
 - b. Make sure the following items auto populated:
 - 1) Event Type – PR05.
 - 2) Accounting Template

2. Click Validate to auto populate the remaining fields.

- On the Reference Tab make sure the Ref Type is Partial.

General Information **Reference** Fixed Asset Intent Reference Fund Accounting Detail Accounting Payment Details

Ref Code: Ref Vendor Line: 0

Ref Dept: Ref Commodity Line: 0

Ref ID: Ref Accounting Line:

Ref Type: **Partial**

- On the Fund Accounting Tab, make sure the Fund, Sub Fund, Department, Unit, Appr Unit, and Object have prefilled. Click the Pick List on the Sub Object and choose a code which describes what you are ordering.

Accounting Total Lines: 1 Line: 1 Line Amount: \$53.00 Line Op

Line	Line Amount	Line Closed Amount	Line Open Am
1	\$53.00	\$0.00	

From 1 to 1 Total: 1

General Information Reference Fixed Asset Intent Reference **Fund Accounting** Detail Accounti

Choose

[Browse](#) [Clear](#)

Fiscal Year: Object:

Sub Object: Name:

Active: Effective From:

Effective To:

Object: 3200

Sub Object:

Revenue:

Revenue:

BSA:

BSA:

	Fiscal Year	Object	Sub Object	Name	Active
Select	2019	3200	0000	Default	Yes
Select	2019	3200	3223	INK AND TONER	Yes
Select	2019	3200	3400	ARCHIVE SRV/OFFICE EXPENS	Yes
Select	2019	3200	3401	CON EDUC WORKSHOPS	Yes
Select	2019	3200	3402	DEPOSIT-MISCELLANEOUS	Yes
Select	2019	3200	3403	DEPOSITS - TAPES MAG CT	Yes
Select	2019	3200	3404	FILM & FILM SUPPLIES	Yes
Select	2019	3200	3405	ONLINE SUBSCRIPTION SRVS	Yes
Select	2019	3200	3406	SUBSCRIPTIONS	Yes
Select	2019	3200	3407	GENERAL OFFICE SUPPLIES	Yes

Posting Line: none

Special Instruction Line: none Special I

Line Number: none File Name: none

- On the Fund Accounting Tab, click the Pick List and choose a Sub Object code which describes generally what you are requesting. **DO NOT USE 0000 except for rare cases**
- Click Save, then Validate. If you get validation errors, fix the errors, and then click the Validate button again. Once you get the “Document Validated Successfully” message, click Submit.

Appendix 3: Preparing an APO

(Majority of purchases will be under an APO – single purchase from a vendor.)

1. In the Jump to Box type APO then click Go.

The screenshot shows the WOASIS Document Catalog interface. At the top, there is a 'Jump to:' box containing 'APO' and a 'Go' button. Below this, the user is logged in as 'Londa Sabatino' and is in the 'Procurement' section. The main area is titled 'Document Catalog' and features a 'Create' button. Underneath, the 'Document Identifier' section contains the following fields: 'Code' (APO), 'Unit' (5485), 'Dept.' (2300), and 'ID' (empty). There are also expandable sections for 'User Information' and 'Document State'.

2. Enter 2300 for the Dept. and the respective Unit code in the Unit (see Table 2 in Appendix 7) then click Create.
3. Type LEG in the ID box and check the Auto Numbering box, then click Create.

This screenshot shows the 'Document Catalog' 'Create' form after the previous steps. The 'Code' field is 'APO', 'Unit' is '2300', and 'Dept.' is '2300'. The 'ID' field now contains 'LEG'. In the 'Other Options' section, the 'Auto Numbering' checkbox is checked, and the 'Create Template' checkbox is unchecked. A 'Create' button is visible at the bottom of the form.

4. The system generates a new Agency Purchase Order (APO). To finish preparing the order complete the following:

A. Header Section

Header

[List View](#)

General Information
Contract Details
Reference
Requestor Issuer Buyer
Modification
Extended Description
Default Shipping/Billing

Reporting
Fixed Asset Intent Reference
Document Information

<p>Document Name: <input type="text" value="survey monkey annual subscription"/></p> <p>Record Date: <input type="text"/> </p> <p>Budget FY: <input type="text"/></p> <p>Fiscal Year: <input type="text"/></p> <p>Period: <input type="text"/></p> <p>Document Description: <input type="text" value="survey monkey annual subscription"/></p> <p>Actual Amount: \$0.00</p> <p>Closed Amount: \$0.00</p> <p>Closed Date: <input type="text"/></p> <p>Supplier Received Date: <input type="text"/></p> <p>Open Amount: \$0.00</p> <p>Open Accrual Amount: \$0.00</p> <p>Not to Exceed Amount: <input type="text" value="\$0.00"/></p> <p>Amendment Number: <input type="text"/></p>	<p>PCard ID: <input type="text"/> </p> <p>PCard Exp: <input type="text"/></p> <p>Procurement Folder:</p> <p>Procurement Type: Agency Purchase Order</p> <p>Procurement Type ID: <input type="text" value="19"/> </p> <p>Vendor Registration Exemption: <input type="text"/> </p> <p>Cited Authority: <input type="text"/> </p> <p>Escrow ID: <input type="text"/> </p> <p>Effective Begin Date: <input type="text"/> </p> <p>Expiration Date: <input type="text"/> </p> <p>Authorization Date: <input type="text"/> </p> <p>Accounting Profile: <input type="text"/> </p> <p>Terms Template: <input type="text"/> </p> <p>Confirmation Order: <input type="checkbox"/></p> <p>Electronic Order Type: <input type="text"/></p> <p>Default Form: <input type="text" value="WV_APO_FORM"/> </p> <p>Last Print Date: <input type="text"/></p>
--	--

- 1) General Information Tab complete the following:
 - a. Document Name – short description of commodity/service e.g. Office Supplies for LASD;
 - b. Document Description – same as document name;
 - c. Procurement Type ID – choose one of the following:
 - i. 15 – Lease Purchases (use for Xerox, Superior, etc.);
 - ii. 19 – Purchase Order (all other purchases which are not a lease purchase); and
 - d. Default Form – Use the Pick List to choose the WV_APO_FORM option.

Header

List View

General Information | Contract Details | Reference | **Requestor Issuer Buyer** | Modification | Extended Description | Default Shipping/Billing | Reporting

Fixed Asset Intent Reference | Document Information

Issuer ID: jeffreyki1 Kimberly A Jeffrey (304) 347-4860 kimberly.jeffrey@wvlegislature.gov Requestor ID: jeffreyki1 Name: Kimberly A Jeffrey Phone Number: (304) 347-4860 Email: kimberly.jeffrey@wvlegislature.gov Requesting Dept:	Buyer Team: Buyer: sabatinol Londa Sabatino (304) 347-4860 londa.sabatino@wvlegislature.gov Award Officer Name: Award Officer Phone Number: Award Officer Phone Extension: Award Officer Email:
--	---

- 2) On the Requestor Issuer Buyer Tab:
 - a. Requestor ID – normally same as Issuer ID; and
 - b. Buyer ID – if paying by a P-Card enter the Id for the PCard holder who will be purchasing the item, otherwise enter sabatinol for the Fiscal Office.
- 3) Click Save.

General Information | Contract Details | Reference | Requestor Issuer Buyer | Modification | Extended Description | **Default Shipping/Billing** | Reporting

Fixed Asset Intent Reference | Document Information

Shipping Location: SP2073 JOINT COMMITTEE ON GOVT & FINANCE DUPLICATING RECEIVER FOR LEGISLATIVE DUPLICATING BLDG 1 RM MB26 1900 KANAWHA BLVD E CHARLESTON WV 25305 US Shipping Method: Free On Board: Delivery Date: Delivery Type: Shipping Additional Info:	Billing Location: BL0432 JOINT COMMITTEE ON GOVT & FINANCE FISCAL OFFICE BLDG 1, RM 132E 1900 KANAWHA BLVD E CHARLESTON WV 25305 US Billing Additional Info:
--	---

- 4) On the Default Shipping/Billing tab:
 - a. Shipping Location - Change to the appropriate Shipping Location (see Table 1 on page 8).
 - b. Billing Location - Change to the appropriate Billing Location.
 - i. All offices other than CSI, use BL0432.
 - ii. CSI uses BL0433.
 - c. Click the Related Actions button, and then select the Ship/Bill to Lines.
- 5) Click Save.

General Information	Contract Details	Reference	Requestor Issuer Buyer	Modification	Extended Description	Default Shipping/Billing	Reporting
Fixed Asset Intent Reference		Document Information					

Reporting 1: 1	Reporting 4:
Unclassified	Reporting 5:
Reporting 2:	Reporting 6:
Reporting 3:	Reporting 7:

6) On the Reporting Tab in Reporting 1 field, enter 1.

B. Vendor Section

Vendor	Discount
---------------	----------

Vendor Customer: 000000106592	Vendor Contact ID:
Legal Name: XEROX CORP	Vendor Contact Name:
Alias/DBA:	Vendor Contact Phone:
Address Code: CV10004	Vendor Contact Phone Ext.:
PO BOX 802555	Vendor Contact Email:
CHICAGO	Fax:
IL	Fax Extension:
606802555	Secondary Reason:
US	Modified: No
Vendor Preference Level: 99	
Web Address http://:	

- 1) Use the Pick List to look up the wVOASIS Vendor ID as follows:
 - a. Type a portion of the vendor name surrounded by the (*) wildcard in the Legal Name box then click Browse.
 - b. Make sure you choose the ID which has an active status and has Yes in the VSS Registered (unless paying with a P-Card then VSS can be No).
 - c. Click Select to choose the Vendor.
 - d. If you are in doubt of which Vendor ID to choose, please contact the Fiscal Office. Also, Appendix 5 has a listing of some frequently used vendors.
- 2) Verify the Address Code listed is the correct address if mailing a paper APO. If it is not the correct address, click the Pick List and choose the correct address from the list provided.
- 3) The Discount tab should always be set to No. There must be a zero in the Discount 1 % and Days in the 1st row.

Vendor	Discount	List View
---------------	-----------------	-----------

Discount 1 %: 0	Days: 0	Disc Alw: No
Discount 2 %:	Days:	Disc Alw:
	Days:	Disc Alw:

General Information	Reference	Fixed Asset Intent Reference	Shipping/Billing	Specification	Matching	Retainage	Tolerance	Discount	Worksites
Commodity Ref Code:	<input type="text"/>	Solicitation Code:							
Commodity Ref Dept:	<input type="text"/>	Solicitation Dept:							
Commodity Ref ID:	<input type="text"/>	Solicitation ID:							
Commodity Ref Commodity Line:	<input type="text" value="0"/>	Solicitation Commodity Group Number:							
Ref Type:	Partial <input type="button" value="v"/>	Solicitation Comm Line:							
Tracking Number:	<input type="text"/>	UR Ref Code:							
Agreement Code:		UR Ref Dept:							
Agreement Dept:		UR Ref ID:							
Agreement ID:		UR Ref Group Line:	0						
Agreement Comm Line:	<input type="text"/>	UR Ref Commodity Line:	0						

2) On the Reference Tab make sure the Ref Type is set to Partial.

General Information	Reference	Fixed Asset Intent Reference	Shipping/Billing	Specification	Matching	Retainage	Tolerance	Discount	Worksites
Shipping Location:	<input type="text"/>	Billing Location:	<input type="text"/>						
Shipping Method:	<input type="text"/>	Additional Info:	<input type="text"/>						
Free On Board:	<input type="text"/>								
Delivery Date:	<input type="text"/>								
Delivery Type:	<input type="text"/>								
Additional Info:	<input type="text"/>								

Save	Undo	Insert New Line	Insert Copied Line	Edit with Grid	Related Actions
					Load T and C Ship/Bill From Header Extended Description

- 3) On the Shipping/Billing Tab if the Shipping Location and Billing Location did not infer from the Header, select the Related Actions link and select Ship/Bill From Header.
- 4) Repeat Steps 1 – 3 as many times as needed. Another option instead of retyping each line is to use the Copy Line and Insert Copied Line feature:
 - a. To copy the Line, click the Copy Icon on the Commodity Line, then click the Insert Copied Line instead of Insert New Line.
 - b. Remember to change the information copied as the system will create an exact duplicate of the original line.

Line	CL Description	Line Amount	Modified
0	No		

From 1 to 1 Total: 1

First Previous Next Last

Go to line: Go

D. Accounting Section:

Note: Each Commodity line will need an Accounting line.

General Information	Reference	Fixed Asset Intent Reference	Fund Accounting	Detail Accounting	Payment Details
Event Type: PR05					Budget FY: <input type="text"/>
Accounting Template: LMDP					Fiscal Year: <input type="text"/>
Line Description: XEROX					Period: <input type="text"/>
Line Amount: \$250.77					Freight %: 0.0000
Reserved Funding: No					Modified: No
Roll Indication 1: <input type="checkbox"/>					Number of Attachments: 0
Roll Indication 2: <input type="checkbox"/>					Line Closed Amount: \$0.00
					Line Closed Date:
					Line Open Amount: \$250.77
					Referenced Line Amount: \$0.00
					Outyear Adjustments Amount: <input type="text"/>
					Obligation Amt Adjusted for Outyear: \$250.77
					Related Accounting Line: <input type="text"/>

- 1) On the General Information Tab complete the following:
 - a. Click Insert New Line, then click Save.
 - b. Make sure the following items auto populated:
 1. Event Type – PR05.
 2. Accounting Template - choose from the listing on Table 2 in Appendix 7.
- 2) Click Validate to auto populate the remaining fields.
- 3) On the Reference Tab make sure the Ref Type is Partial.

General Information	Reference	Fixed Asset Intent Reference	Fund Accounting	Detail Accounting	Payment Details
Ref Code: <input type="text"/>					Ref Vendor Line: 0
Ref Dept: <input type="text"/>					Ref Commodity Line: 0
Ref ID: <input type="text"/>					Ref Accounting Line: <input type="text"/>
					Ref Type: Partial

- 4) On the Fund Accounting Tab, make sure the Fund, Sub Fund, Department, Unit, Appr Unit, and Object have prefilled. Click the Pick List on the Sub Object and choose a code which describes what you are ordering.

The screenshot shows the Accounting system interface. At the top, it displays "Accounting" and "Line: 1 Line Amount: \$336.00 Line Open Amount: \$0.00". Below this, there are input fields for "Fiscal Year", "Sub Object", "Object", and "Effective From". A "From" button is visible on the left. A table lists commodity lines with columns for "Fiscal Year", "Object", "Sub Object", "Name", "Active", and "Effective". The first row is highlighted in yellow. Below the table, there are tabs for "General Information", "Reference", "Fixed Asset Intent Reference", "Fund Accounting", and "Detail A". The "Fund Accounting" tab is selected. At the bottom, there are input fields for "Fund: 0175", "Sub Fund: 0000", "Object: 3247", and "Sub Object: []". The "Sub Object" field is highlighted in yellow.

- 5) Repeat steps 1-4 as many times as needed to record an accounting line for all commodity lines. Another option, instead of retyping each line, is to use the Copy Line and Insert Copied Line feature:
 - a. To copy the Line, click the Copy Icon on the Commodity Line, then click the Insert Copied Line instead of Insert New Line.
 - b. Remember to change the information copied (if needed) as the system will create an exact duplicate of the original line.

The screenshot shows the Commodity system interface. At the top, it displays "Commodity" and "Total Lines: 1 Line: 0 CL Description: Line Amount:". Below this, there is a table with columns for "Line", "CL Description", "Line Amount", and "Modified". The first row is highlighted in yellow. A "Copy" icon is circled in the table row. Below the table, there are buttons for "First", "Previous", "Next", and "Last". A "Go to line:" field and a "Go" button are also visible.

E. Terms and Condition Section:

- 1) Insert a New Line and select Blank from the T & C Pick List.
5. Click Save, then Validate. If you get validation errors, fix the errors then click the Validate button again. Once you get the "Document Validated Successfully" message, click Submit.

Appendix 4: Receiving Goods

All purchases for commodities where the first digit of the commodity code is less than 7 will require a receiving report to be prepared in the system.

1. In the Jump To box, type RCSRCH then click Go.
2. On the Receiving Search Screen perform one of the following steps then click Browse:
 - a. To view all open Purchase orders for the entire Joint Committee type 2300 in the Doc Dept.
 - b. To view open Purchase Orders for a specific division, type 2300 in the Doc Dept and the division unit code in the Doc Unit box (see Table 2 in Appendix 7).

W O A S I S

Welcome, Kimberly A Jeffrey

Jump to: RCSRCH Go Home Personalize Acc

Procurement Budgeting Accounts Receivable Accounts Payable

Receiving Search

Memo Receipt Browse Clear

Doc Code :

Doc Dept : 2300

Doc Unit :

Doc ID :

Procurement Folder :

Vendor :

Commodity Code :

Shipping Location Code :

Issuer Code :

Requestor Code :

Doc Code	Doc Dept	Doc Unit	Doc ID	Phase	Description	Vendor	Name	# of Lines	Date
ADO	2300	5483	LEG1900000003	Final	IRON MOUNTAIN STORAGE	000000126524	IRON MOUNTAIN INCORPORATED	1	09/06/2018
APO	2300	5486	LEG1900000003	Final	SUPPLEMENTAL	000000105639	MATTHEW BENDER & CO INC	2	09/14/2018
APO	2300	5490	LEG1900000004	Final	AIR QUALITY TESTING	000000208254	ASTAR ABATEMENT INC	1	09/14/2018

Copy First Prev Next Last

Select Lines To Receive

3. Click on the line for the Purchase Order you want to receive to highlight it, then click the Select Lines to Receive link.
4. There are various options for receiving:
 - a. If all items listed require a receiving report and have been received, click the Receive All Lines check box.
 - b. If you only have received a portion of the items or the PO contains lines which do not require receiving (commodity code begins with 7, 8, or 9) then click the individual lines to receive.
 - c. Once all the received items have been checked, click the Receive link.

Menu

Receive All Lines

Receive All Unselected Lines

Line	Document Id	Commodity	Commodity Description	Rec. Quantity	Rec. Contract	Rec. Final	Quantity	Unit	Unit Price	CL Description	Contract Amount	Non-Reserved Funding Open Amount Total
<input type="checkbox"/>	1	LEG1900000003	55101524 Reference books	0.00000	\$0.00	<input type="checkbox"/>	7.00000	EA	\$103.00	WV LEGISLATIVE REVIEW SERVICE 2018	\$0.00	\$721.00
<input type="checkbox"/>	2	LEG1900000003	78121603 Freight fee	0.00000	\$0.00	<input type="checkbox"/>	0.00000		\$0.00	SHIPPING CHARGES	\$72.46	\$72.46

First Prev Next Last

Receive Cancel

- The Receiving Document will open. On the Header General Information Tab, enter the Receiving Location (See Table 1: Receiving Locations on page 8) or choose from the Pick List.

Header

General Information | Extended Description | Document Information

Document Name: SUPPLEMENTAL

Receiving Location: SP2071

Allow Part. Recpts.:

Received Date: 09/20/2018

Ref Doc Code: APO

Receiver: jeffreyki1

Ref Doc Dept: 2300

Name: Kimberly A Jeffrey

Ref Doc ID: LEG1900000003

Phone: (304) 347-4860

Procurement Folder: 494626

Ext:

Procurement Type ID: 19

Email: kimberly.jeffrey@wvlegisl.

Procurement Type:

- On the Commodity General Information Tab, enter the received quantity or if it was a lump sum amount enter the Received SC Amount (Note: you will only use one option for each item).

Header

Vendor Code: 000000105639 Name: MATTHEW BENDER & CO INC

Commodity Total Lines: 2 Commodity Line: 1 Commodity: 55101524 Total Qty Received: 7.00000

Commodity Line	Commodity	CL Description	Received Qty	Rejected Qty	Received SC Amount	Total Qty Received
1	55101524	WV LEGISLATIVE REVIEW SERVICE 2018	7.00000	0.00000	\$0.00	7.00000
2	78121603	SHIPPING CHARGES	0.00000	0.00000	\$72.46	0.00000

From 1 to 2 Total: 2

General Information | Tolerance Information

Line Type: Item

Commodity Match Type: 3

Ref Award Line: 1

MSDS Required:

MSDS Received:

CL Description: WV LEGISLATIVE REVIEW SERVICE 2018

Shipment Indicator: Partial

Commodity: 55101524

Condition:

Reason:

Stock Item Suffix:

Unit: EA

Ordered Qty: 7.00000

Received Qty: 7.00000

Rejected Qty: 0.00000

Total Qty Received: 7.00000

Comments:

Ordered SC Amount: \$0.00

Received SC Amount: \$0.00

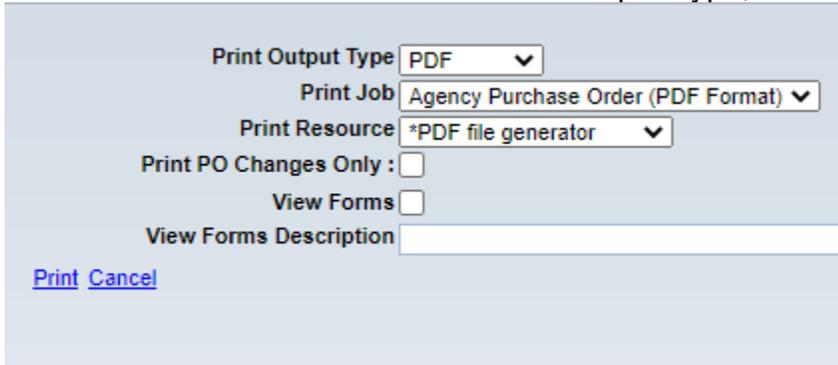
Commodity Description: Reference books

Save | Undo | Insert New Line | Insert Copied Line | Edit with Grid

Copy | Validate | Submit | Discard | Print | Processing | Workflow | File | Close

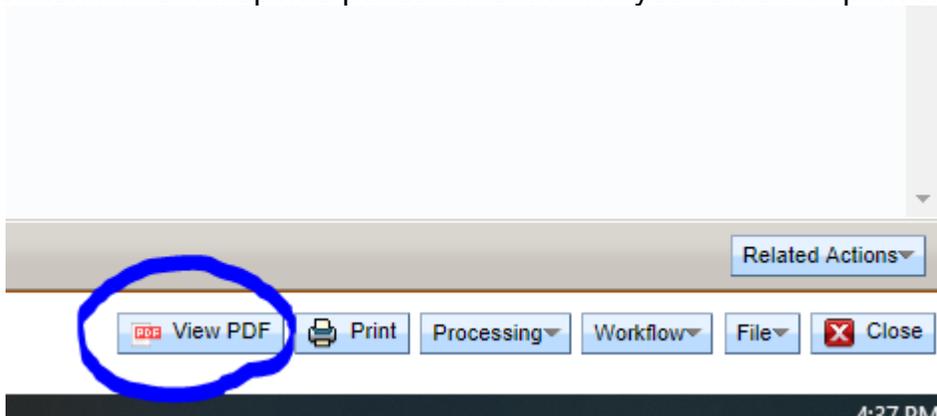
- If only a partial shipment was received, you must choose an option on the Condition Pick List and include information in the reason and/or comment box.
- Click Save and move to next commodity line, if necessary. Repeat steps 6 & 7 for all commodity lines. Once all items have been recorded as received, click Validate and correct any validation errors.

9. Once you get Document Validated Successfully, click Submit. Then click the Print button. Then choose "PDF" as the Print Output Type, then click Print.



Print Output Type PDF ▼
Print Job Agency Purchase Order (PDF Format) ▼
Print Resource *PDF file generator ▼
Print PO Changes Only:
View Forms
View Forms Description
[Print](#) [Cancel](#)

10. The screen will revert to the document then click the View PDF button at the bottom. This will open a pdf document which you can either print or save.



Appendix 5: Frequently Used Vendors

Name	Code
ARI (ADO)	000000115021
Capitol Car Wash	000000209393
Dell	000000223330
Iron Mountain (ADO)	000000126524
Lexis Nexis (Matthew Bender)	000000105639
Liberty Distributors	000000206075
Lowe's	000000213630
Office Depot (ADO)	000000217322
Pitney Bowes (ADO)	000000101263
Staples	000000100820
Superior Office	000000201104
Thomson Reuters	000000184365
Tyler Mountain	000000202284

Appendix 6: Common Commodity Codes

Commodity Code	Description	Object Code	Sub Object
43211521	Computer - All in one	3248 (under \$5,000) 5210 (over \$5,000)	3914 5324
43211602	Computer - Dock	3248 (under \$5,000) 5210 (over \$5,000)	3914 5324
43211900	Computer – Monitor (LCD)	3248 (under \$5,000) 5210 (over \$5,000)	3724 5324
43211501	Computer - Servers	3248 (under \$5,000) 5210 (over \$5,000)	3914 5324
43211607	Computer - Switch Boxes	3246 (under \$5,000) 5210 (over \$5,000)	3913 5324
43232502	Computer Based Training Software	3242	3694
43210000	Computer Equip. & Accessories	3248 (under \$5,000) 5210 (over \$5,000)	3914 5324
81110000	Computer Services	3214	0000
43211507	Computers - Desktop	3248 (under \$5,000) 5210 (over \$5,000)	3722 5324
43211503	Computers – Notebook/Laptop	3248 (under \$5,000) 5210 (over \$5,000)	3723 5324
43211509	Computers - Tablet	3248 (under \$5,000) 5210 (over \$5,000)	3725 5324
56000000	Furniture	3249 (under \$5,000) 5200 (over \$5,000)	0000 5300
44000000	General Office Equipment	3249 (under \$5,000) 5200 (over \$5,000)	0000 5301
44103105	Ink Cartridges	3200	3223
44121500	Mailing Supplies	3200	3407
43232801	Network Monitoring Software	3247 (under \$5,000) 8203 (over \$5,000)	4212 8250
44120000	Office Supplies	3200	3407
44101601	Paper Cutting Accessories	3249 (under \$5,000) 5200 (over \$5,000)	0000 5301
14121812	Photography Paper	3200	3407
45000000	Printing & Photographic Equipment	3249 (under \$5,000) 5200 (over \$5,000)	0000 5301
55101524	Reference Books – for standing orders	5208	5311
55101524	Reference Books – law library	5208	5000
55101524	Reference Books – state code books	5208	5312
43211711	Scanner	3249 (under \$5,000) 5210 (over \$5,000)	0000 5324

Appendix 7: Various Tables

Table 2: Accounting Template Listing/Unit Listing

Division	Accounting Templates	Unit Number
Administration/Legislative Manager's Office	LMADM	5481
Budget	LMBD	5482
Claims Commission	LMCC	5483
CSI	LMCSI	5484
CSI – Special Fund	CSI	5484
Fiscal Office	LMFD	5485
Legislative Services	LMLS	5486
Post Audit	LMPA	5487
PERD	PERD	5488
Public Info	LMPI	5489
Joint Committee	JCGF	5490
Rule Making	LMR	5493
LASD	LASD	5494
CVCF	CVCF	5495
Print Shop/Duplicating	LMDP	5496

Table 3: Purchase Card Holders with IDs

P-Card ID	Cardholder Name	Buyer ID	Division served
50789	RICKY D EPLIN	Eplinri1	CSI
47501	WILLIAM H SPENCER	spencerw	Post Audit; PERD; Legislative Services; Budget; Legislative Manager's; Fiscal Division
34947	SHERRY M LAWSON	Lawsonsh3	CSI
35132	DENNIS LOUDERMILK	Loudermilkde1	Public Information
35296	JOINT EXPENSE\GHOST	riffek	All
35438	DREW J ROSS	Rosssdr1	Public Information; LASD; Duplicating
47030	LESLIE R ROBERTS	Robert sle1	Claims Commission; Crime Victims

Appendix 8: Checking Documents and Printing Forms

Once a document has been submitted to workflow it will be sent to the appropriate worklist for approval. If a document needs to be returned for corrections or additional information, the rejected document will be found in the employees wvOASIS worklist.

Documents which have been returned by the Inventory Coordinator and/or Fiscal Office for corrections will be listed on the employees wvOASIS Worklist. The Worklist is also where the Inventory Coordinator/Fiscal Office will grab documents for approval.

How to access your worklist

A Worklist is a listing of all documents assigned to you, which are awaiting approval. Click the Message Center in the Secondary Navigation Panel, then Click Worklist. The Worklist page opens displaying the work items for you, with your name displayed in the Select Worklist field. Your Worklist should be reviewed at least daily.

wwOASIS PROD FIN

Worklist

Select Worklist: Londa Sabatino [Change Worklist Role Order](#)

Level:

Code:

Dept:

ID:

Submitter ID:

Escalated Item:

[Browse](#) [Clear](#)

Level	Code	Dept	ID	Escalated Item	Comments	Creator ID	Submitter ID
-------	------	------	----	----------------	----------	------------	--------------

First Prev Next Last [Approve](#) [Reject](#) Take Task [Return Task](#) [Refresh](#)

[Menu Recall](#)

How to approve documents

The Fiscal Office and the Legislative Manager will have additional workflow roles. Each type of document has its own Worklist. To select a role, click the Select Worklist dropdown list to display the various roles you are assigned. Selecting the role will open its Worklist to show any documents which require approval.

wwOASIS PROD FIN

Worklist

Select Worklist: Londa Sabatino [Change Worklist](#)

Level: ARE Lvl 1 Dept:2300

Code: BG92AMND Lvl 1 Dept:2300

Code: BG92SEC Lvl 1 Dept:2300

Code: BG92TRF Lvl 1 Dept:2300

Dept: BG94E Lvl 1 Dept:2300

ID: BG95E Lvl 1 Dept:2300

Submitter ID: BGE92 Lvl 1 Dept:2300

Escalated Item: BGEX90 Lvl 1 Dept:2300

[Browse](#) [Clear](#)

BGPDE Lvl 1 Dept:2300

BGPHE Lvl 1 Dept:2300

BGPHE Lvl 1 Dept:2300

BGR91 Lvl 1 Dept:2300

Welcome, Londa Sabatino

wwOASIS PROD FIN

- Message Center
 - Inbox
 - Alerts
 - Broadcasts
 - Worklist**
 - Forms
- Search
- History
- Favorites
- Administration

Worklist

Select Worklist: TVE Lvl 1 Dept:2300 [Change Worklist Role Or...](#)

Level:

Code:

Dept:

ID:

Submitter ID:

Escalated Item:

[Browse](#) [Clear](#)

	Level	Code	Dept	ID	Escalated Item	Comments	Creator
<input type="checkbox"/>	4	TVE	2300	1900013116	No	No	jeffreyki1
<input type="checkbox"/>	4	TVE	2300	1900013134	No	No	jeffreyki1
<input type="checkbox"/>	4	TVE	2300	1900013131	No	No	jeffreyki1
<input type="checkbox"/>	4	TVE	2300	1900013222	No	No	jeffreyki1

First Prev Next Last [Approve](#) [Reject](#) [Take Task](#) [Return Task](#) [Refresh](#)

[Menu](#) [Recall](#)

To approve documents: Click the checkbox and then click the Take Task link to add the documents into your Worklist. Then click the Worklist link on the Secondary Navigation Panel to return to your Worklist. The selected items will now be listed.

Welcome, Londa Sabatino

wwOASIS PROD FIN

- Message Center
 - Inbox
 - Alerts
 - Broadcasts
 - Worklist**
 - Forms
- Search
- History
- Favorites
- Administration

Worklist

Select Worklist: Londa Sabatino [Change Worklist Role C...](#)

Level:

Code:

Dept:

ID:

Submitter ID:

Escalated Item:

[Browse](#) [Clear](#)

	Level	Code	Dept	ID	Escalated Item	Comments	Creato
<input type="checkbox"/>	4	TVE	2300	1900013116	No	No	jeffreyk
<input type="checkbox"/>	4	TVE	2300	1900013131	No	No	jeffreyk
<input type="checkbox"/>	4	TVE	2300	1900013134	No	No	jeffreyk
<input type="checkbox"/>	4	TVE	2300	1900013222	No	No	jeffreyk

First Prev Next Last [Approve](#) [Reject](#) [Take Task](#) [Return Task](#) [Refresh](#)

[Menu](#) [Recall](#)

Once the items are in your Worklist, click the ID hyperlink to open the Document. The Fiscal Office will review the document to ensure all necessary fields and attachments are included. Once the review is complete the Inventory Coordinator/Fiscal Office will choose either Approve or Reject as applicable.

Upon the Approval of the Fiscal Office and Legislative Manager, the document will go to the Phase Final and update the record in the system.

What to do about rejected documents?

If the Fiscal Office or Legislative Manager rejects the document, it will reappear in the Worklist of the person who submitted the document. The Fiscal Office will also email the individual the reason(s) the document was rejected. Once the corrections have been made the document should be Submitted again into workflow.

How to Print my Documents

Option 1: Saves a copy of your document in Forms which can be accessed later.

The screenshot displays a software interface with a 'Commodity' table and a 'Print' dialog box. The table has columns for Commodity Line, Commodity, CL Description, Received Qty, Rejected Qty, Received SC Amount, and Total Qty Received. The 'Print' dialog box is open, showing options for Print Output Type (PDF), Print Job (RC Document Form (PDF Format)), Print Resource (PDF file generator), and View Forms (checked). A blue arrow points to the 'Print' button in the bottom right corner of the dialog box.

Commodity Line	Commodity	CL Description	Received Qty	Rejected Qty	Received SC Amount	Total Qty Received
1	55101524	WV LEGISLATIVE REVIEW SERVICE 2018	7.00000	0.00000	\$0.00	7.00000
2	78121603	SHIPPING CHARGES	0.00000	0.00000	\$72.46	0.00000

From 1 to 2 Total: 2

Print Output Type: PDF
Print Job: RC Document Form (PDF Format)
Print Resource: PDF file generator
View Forms:
View Forms Description: receiving report example

Print

1. Open your document Print button then choose “PDF” as the Print Output Type. Check the View Forms checkbox and enter a short description so you can identify the form, then Click Print.
2. Close the document and using the Secondary Panel, open the Message Center menu then click Forms.
3. Click the View PDF for your document to download a PDF file which you will either save to a folder on your computer or print out.

vvOASIS PROD FIN

View Forms [Menu Back](#)

[Browse](#) [Clear](#) [Refresh](#)

Doc Code :

Doc Dept :

Document ID :

Description :

Status	Description	Doc Code	Doc Dept	Document ID	File Name	
✓ Pending	receiving report example	RC	2300	1900000007338	sabatinol_434565_RC_2300_1900000007338_1	View PDF
Completed	for OIG Auditors	CR	2300	1500097709	sabatinol_429579_CR_2300_1500097709_1	View PDF
Completed	court fee	CR	2300	1600051622	sabatinol_429642_CR_2300_1600051622_1	View PDF
Completed	oig	CR	2300	1500051278	sabatinol_429645_CR_2300_1500051278_1	View PDF
Completed	auditors	CR	2300	1700002391	sabatinol_429658_CR_2300_1700002391_1	View PDF
Completed	auditor	CR	2300	1700120514	sabatinol_429674_CR_2300_1700120514_1	View PDF
Completed	audit	CR	2300	1800025005	sabatinol_429678_CR_2300_1800025005_1	View PDF
Completed	rc	RC	2300	1900000007338	sabatinol_429296_RC_2300_1900000007338_1	View PDF
Completed		ADO	2300	LEG1900000003	sabatinol_427309_ADO_2300_LEG1900000003_1	View PDF
Completed		APO	2300	LEG1900000003	sabatinol_427310_APO_2300_LEG1900000003_1	View PDF

Option 2: Immediately opens document in pdf for saving or printing

1. Open your document Print button then choose "PDF" as the Print Output Type, then click Print.

Print Output Type

Print Job

Print Resource

Print PO Changes Only :

View Forms

View Forms Description

[Print](#) [Cancel](#)

2. The screen will revert to the document then click the View PDF button at the bottom

Related Actions ▾

 View PDF  Print  Close

4:37 PM

How do I know where my document is at in the workflow?

There are two ways to check the status of your documents, one using the Approval Log and the other using the Document Catalog.

1. Document Catalog

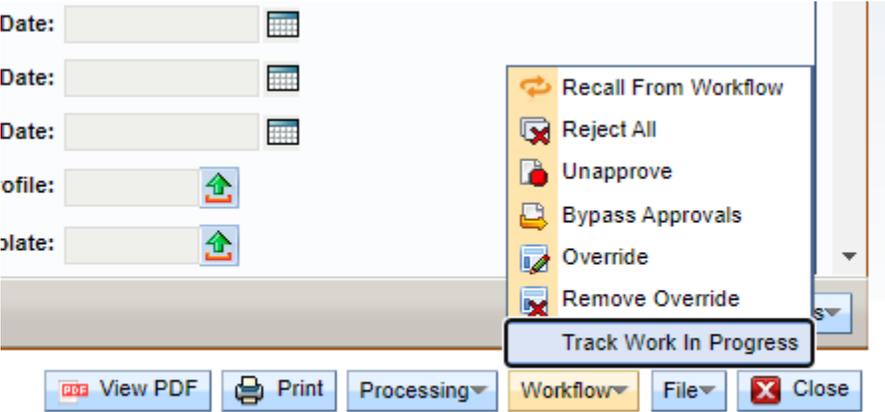
Click Search on the Secondary Navigation Panel, then Click Document Catalog

The screenshot displays the wvOASIS Document Catalog interface. The top navigation bar includes the wvOASIS logo, a 'Jump to: IWF10' field, and buttons for 'Go', 'Home', 'Personalize', and 'A'. Below the navigation bar, the user is logged in as 'Londa Sabatino'. The left sidebar contains a 'Secondary Navigation Panel' with options: Message Center, Search, Document Catalog (highlighted), Contract Catalog, Report Search, History, Favorites, and Administration. The main content area is titled 'Document Catalog' and features a 'Create' button. It is divided into three sections: 'Document Identifier' with input fields for Code, Unit, Dept., and ID; 'User Information' with input fields for Create User ID and Create Date; and 'Document State' with dropdown menus for Function, Status, and Phase. At the bottom of the form are 'Browse' and 'Clear' links.

Click the Arrow next to User Information and Document State to view those options. Type your wvOASIS User Id in the Create User ID box to search for all documents created by you. You can also use the following prompts to help narrow the search:

- A. Code: Type the letter code of the document type
- B. ID: Type the document id of the document you are searching for. Note: You can use the (*) wildcard to replace the zeros after the first 2 digits i.e.) Doc Id 1900013222 can be typed as 19*13222.
- C. Create Date: Date you created the document
- D. Phase: Status of the request
 1. Draft – Document either has not been submitted for approval or has been rejected for correction
 2. Pending – Document has been submitted for approval but has not completed the approval process
 3. Final – Document has been approved and assets have been added/updated in system
- E. Status: You can also use this to specifically look for Rejected Documents by selecting Rejected as the Status.

If the document is in a Pending status you can click the hyperlink to open the document and then Click Workflow and select Track Work in Progress.



A Log will display showing where the document is in workflow and if anyone has taken the document into their worklist. You can see a visual graphic of the progress by clicking View Visual rather than the grid.

SIS Jump to:

Procurement | Budgeting | Accounts Receivable | A

Track Work in Progress - APO - 2300 - LEG210000063 - 2

Date Submitted : 9/11/2020 Submitter : Terri L Stowers

Approval Rule ID	Seq No	Approval Level	Assignment Date	Initial Assignee Name	Approval Status	Approval User Name
✓ 4280	3	3	2020-09-11	APO Lvl 1 Dept:2300	Pending	Pending
4280	5	5		APO Lvl 2 Dept:2300	Pending	Pending

[View Log](#) [View Visual](#)

Current Assignee

Approval Level	Current Assignee Name
✓ 3	Londa Sabatino

[First](#) [Prev](#) [Next](#) [Last](#)

2. Approval Log

Type IWF09 in the Jump to Box and hit Enter. On the Screen enter the Doc Code and Doc ID of the document you are looking for, then click Browse. Note: This log only works if the document has already been approved and/or rejected by the Fiscal Office or Legislative Manager.

AMS Advantage - Internet Explorer
 https://prod-fin.wvoasis.gov/webapp/prdfin11/Advantage

wvOASIS
 Jump to: IWF09 Go Home Personalize Accessibility App Help About

Welcome, Londa Sabatino
 Procurement Budgeting Accounts Receivable Accounts Payable

wvOASIS PROD FIN
 Approval Log [Menu](#) [Back](#)

[Browse](#) [Clear](#)

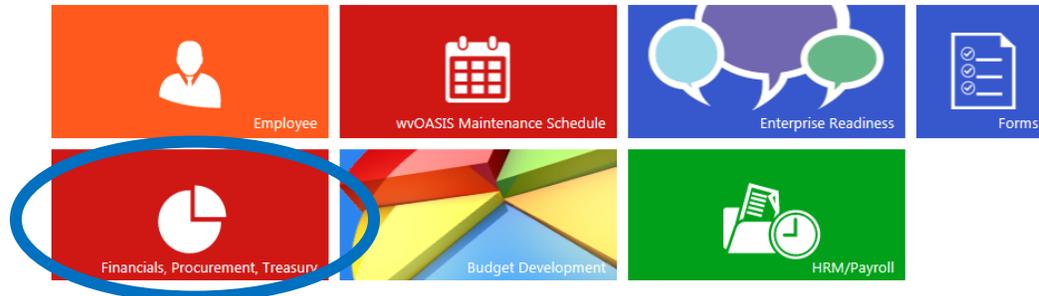
Approval Rule ID: Doc Dept: User ID:
 Doc Code: FM Doc ID: 19*1170

Approval Rule ID	Doc Code	Doc Dept	Doc ID	User ID	Doc Vers.	Event Date	Approval Level	Status Before	Status After
✓ 4321	FM	2300	190000001170	sutherlandfe1	1	9/17/2018 11:22:12 AM	4	Pending	Approved
4321	FM	2300	190000001170	sabatino1	1	9/18/2018 4:51:54 PM	5	Pending	Approved

First Prev Next Last

Appendix 9: Logging into Oasis Financials

1. Log into myApps
2. Click the Red Financials Procurement Treasury Button



3. This will open the Financial module, which opens in a new window.