WHOI Procurement
Webform Requisitioning
Guide

INSTRUCTION GUIDE
WHOI PROCUREMENT
508-289-2371
A few considerations,

- Please remember that this process is for Procurements (not for Sub awards or other Grant and Contract Service business)

- If the approver does not respond to the approval request within 24 hours, it will progress to the next approver

- If you are an approver and you will be out of the office, please notify Karen Flaherty to set your Out of Office for the approvals (and, let her know when you return so she can toggle it off)

- Change orders cannot be processed through this application

- While approval and disapprovals can be handled via e-mail, the attachments are only viewable on WHOI’s intranet (VPN required to view attachments)

- Approvers have the ability to communicate by enclosing the message in [[ brackets ]] but the brackets must be included for this to work
Access and Login

- The Webform can be found at [https://purchasereq.whoi.edu](https://purchasereq.whoi.edu)
- Upon arrival on the web form tool you will be prompted to login.
  - Use your WHOI email login to access the form.

- Once logged in you will find the web requisitioning tool.
Creating your Requisition

- Select your Vendor by typing the vendors name or vendor number (PEID) into the vendor field.

  - The list will populate as you type.
    - 4 characters starts the search
  - The Vendor Address will populate with the primary address, but other options might be available for you to choose.
    - All available addresses can be accessed for the chosen vendor by using the drop-down box.
  - If your vendor is not found
    - Please Choose Vendor “Best Source”
    - In NOTES, please name the vendor you want us to use
    - Attach the quote from the unlisted vendor with contact information on it (email, phone number)

- Provide the Vendor Contact if there is a specific party to contact at the vendor

  - Enter the name of the vendor contact in the Vendor Contact field

- Using the Required Date field, notify us of your required date

- If you are requisitioning for someone else, this option allows you to identify a Requester.

  - This field helps WHOI Shipping and Receiving deliver to the proper person

- If you are tracking a Shop Work Order (not an OOI WO number) enter it here
• The Object Lookup allows you to search and identify Object codes

Object Lookup: 

• Advise us where we are going to deliver (Drop Ship covered in the next section)

Delivery Location: Building [ ] Room [ ]

  o Use the dropdown to select the Delivery Building, include the Room Number.
    ▪ These are required fields unless using a dropship address.
    ▪ If you are shipping outside of WHOI, leave this blank and fill in that info in Drop Ship Address

Drop Shipping Orders
• Drop Ship Address

Drop Ship Address: [ ]

  o If you are shipping to a destination off of WHOI’s campus, enter the location in the Drop Ship Address box
  o Note the 150 Character Maximum

Object Code Lookup
• Object Code Lookup

  o An Object Code Lookup field is provided for your convenience
  o Object codes can be looked up by text or number
  o This is a reference field only

Purchase Line Details
• Use the Lines Items section provide the information for the procurement

  o Use the Add line button to add lines, the red X to remove them
- **Account**
  - Project or Cost Center – must be a valid/active number

- **Object**
  - Object code
    - Some objects are restricted from use and if chosen, will give you an error

- **WO (Only used for OOI)**
  - Work order number
    - this is for OOI only
    - The number must be predefined in OneSolution
    - Will give you and error if not defined

- **Description**
  - This description should match your quotes description
  - There is a limit of 280 characters

- **Catalog**
  - Enter the item catalog number (if applicable)

- **Freight**
  - If you know the freight, enter it
    - This is line specific

- **Qty**
  - Enter the number of items being purchased on the line item

- **UOM**
  - Using the drop down, select the unit of measure
    - If the desired UOM is not available, please contact Procurement

- **Unit Price**
  - The unit price of the item

- **Amount**
  - Auto populated calculated field (you cannot enter this info)
    - Amount = Qty * Unit Price + Freight if applicable

- If the order meets either of the following criteria, please use the radio buttons to identify as such

- **Service or Custom Product?**

- **Radioactive Material?**

- **Service**
  - If the vendor is providing a service, please check the box.

- **Custom Product**
  - If the product is not “off the shelf” or is specifically designed by request it is a Custom Product, please check the box.

Services or Custom products require a SOW (Statement of Work) that accurately and completely describes the service or, custom product being provided.

- **Radioactive Material**
  - Radioactive Material, please check this box
  - Checking this box will seek approval from Safety
Attachments

- Attachments

ATTACHMENTS

![Add Attachments]

- Attach any applicable documentation here.

- The Add Attachments button is used for attachments.
  - Clicking the Add Attachments button will Pop Up the Web Form Attachment window.
  - If it doesn’t appear, please check your pop-up blocker

![Web Form Attachments]

- To add attachments
  - Enter a Description for the Attachment
  - Please use the Naming Convention
    - Quote (Every Order when Possible)
      - Used for Quotes
    - SOW
      - Used for Statement of Work
    - Quote/SOW
      - Statement of Work may be the same as the quote in which case call it Quote/SOW
    - Sole Source
      - Required on all orders > $9,999.99
      - Unless you submit two written quotes and are using the lowest of the two
      - Use the Sole Source to document the sole source rational for audit
    - WHOI’s sole source document can be found on the intranet
      - [http://www.whoi.edu/procurement/purchasing](http://www.whoi.edu/procurement/purchasing)
  - Click Browse
    - Browse to the attachment and select it
  - Click Upload
- The Attached Document will be listed in the “List of Attachments” with an ID and name.
• **List Of Attachments**

| 17F900 > Sole Source |

- **Remove Attachment**
  - Removes the attachment
- **View Attachment**
  - Allows the user to view the attachment
- **Close Window**
  - Closes the attachment dialogue box, and returns you to the PR form.

• **Notes**

- Use the notes field to communicate information to the buyer
- 250 character maximum

• **Action Bar**

| Action Bar: | Submit | Copy | Save | Clear | Log Off |

- **Submit**
  - Validates and sends the requisition to workflow where approvals will begin.
  - Once fully approved, the requisition will be sent to Purchasing.
  - If the requisition is rejected, it will appear on your dashboard in the appropriate area.

- **Copy**
  - This button allows you to ‘copy’ a completed requisition saving you time when reordering the same items, you previously purchased.

- **Save**
  - Will save your requisition locally – not sending it for approvals.
  - This option allows you to continue creating the requisition or edit the requisition as needed.

- **Clear**
  - Will clear the screen

- **Log Off**
  - Please make sure you log off when done with your requisitions
Search Requisition History
- Find a P.R.
  - Click Find a PR to search for Purchase Requisitions previously submitted using this WebForm
    - Select a category and filter
    - Enter search criteria in the fillable field
    - Search yours or, by Department
  - When the list populates, click the circle beside the one you want
  - Press Fill Form
    - Information from the previous PO will populate the Webform.
  - To Exit, press Exit
Your Dashboard

- My Dashboard

  - Click My Dashboard to view your Dashboard.

  - Use the dashboard to track and work with your requisitions.
    - Unsubmitted Purchase Requisitions (previously saved but not submitted) will be available for you to resume working on them.
      - Use these 🔄 to edit the requisition the Webform or ✗ to delete it from your dashboard.
    - Rejected Purchase Requisitions will be listed
    - If you are an approver, and you reject a requisition, please enter comments – these will be viewable by the requisitioner and will assist them in making any necessary changes to the requisition prior to resubmitting.
    - Active Purchase Requisitions will be listed
    - Active requisitions are in the approval cycle and cannot be ‘pulled back’ to be edited.