

# WHOI Procurement Webform Requisitioning Guide

INSTRUCTION GUIDE

WHOI PROCUREMENT

508-289-2371

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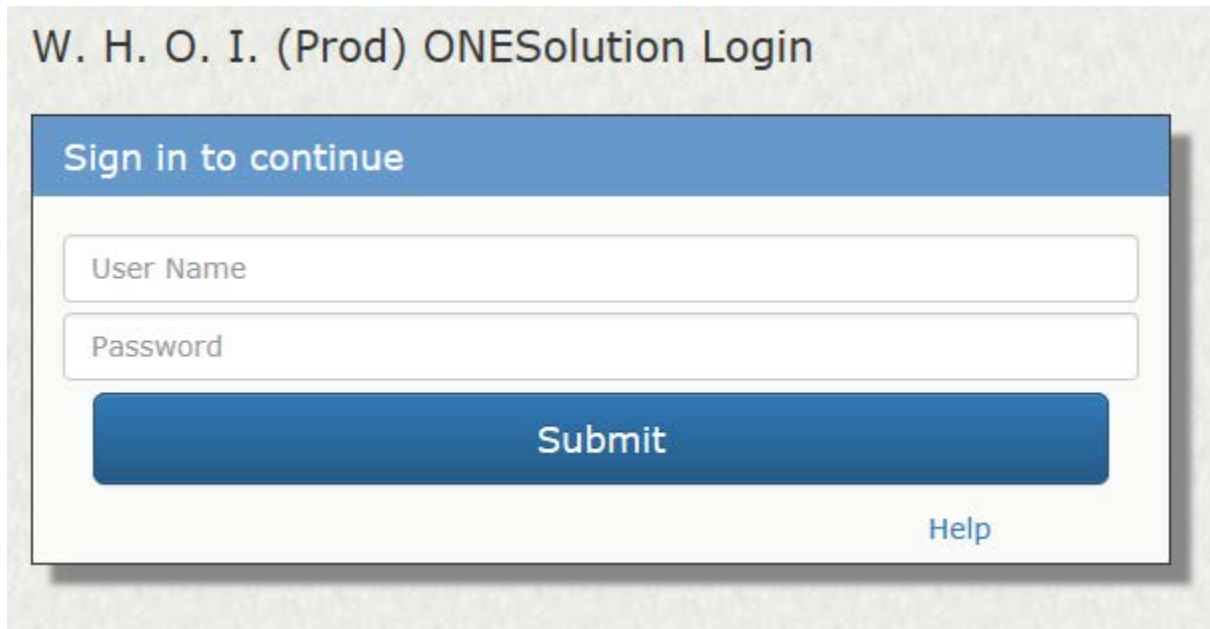
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A few considerations,

- 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.who.edu>
- Upon arrival on the web form tool you will be prompted to login.
  - Use your WHOI email login to access the form.



W. H. O. I. (Prod) ONESolution Login

Sign in to continue

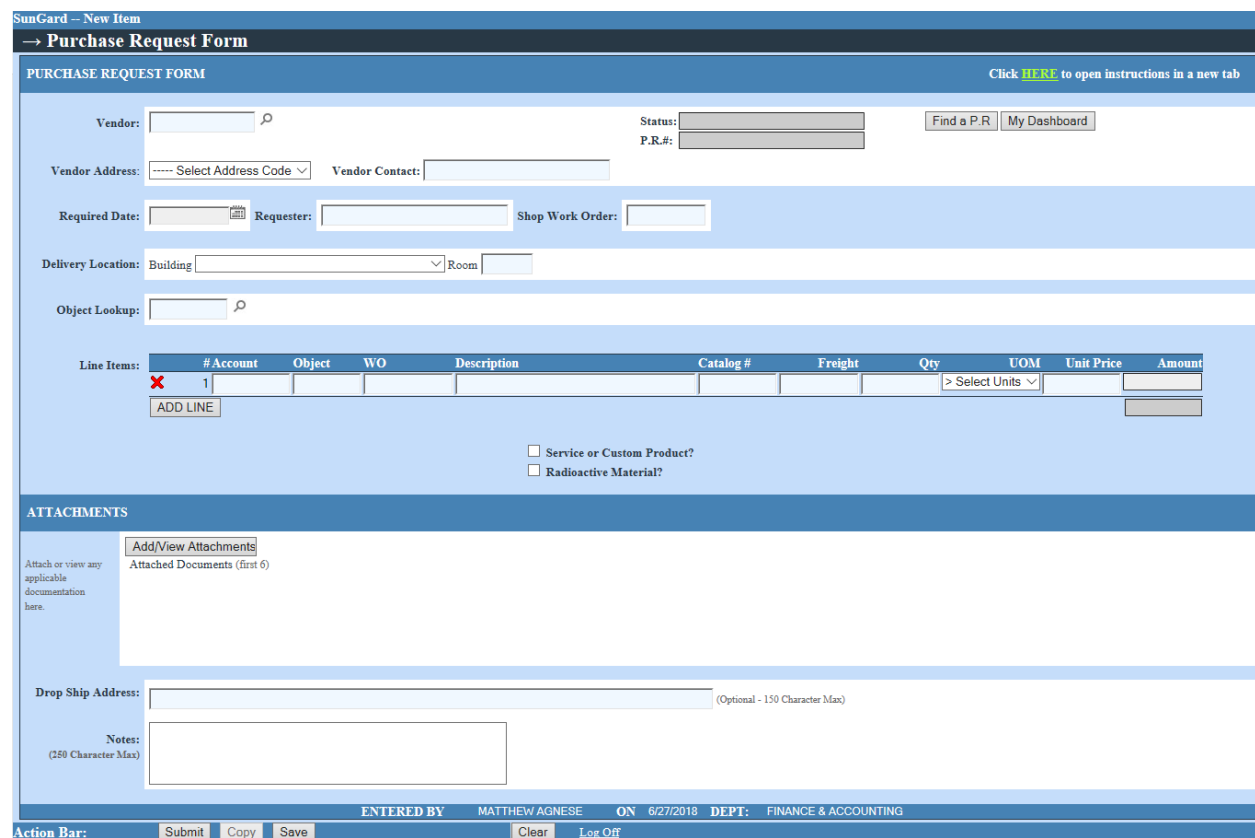
User Name

Password

Submit

Help

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



SunGard - New Item  
→ Purchase Request Form

PURCHASE REQUEST FORM [Click HERE to open instructions in a new tab](#)

Vendor:  Status:  Find a P.R. My Dashboard  
P.R.#:

Vendor Address:  Select Address Code Vendor Contact:

Required Date:  Requester:  Shop Work Order:

Delivery Location: Building  Room

Object Lookup:

Line Items:	# Account	Object	WO	Description	Catalog #	Freight	Qty	UOM	Unit Price	Amount
✖	1							> Select Units		
<input type="button" value="ADD LINE"/>										

☐ Service or Custom Product?  
☐ Radioactive Material?

ATTACHMENTS

Attached Documents (first 6)

Drop Ship Address:  (Optional - 150 Character Max)

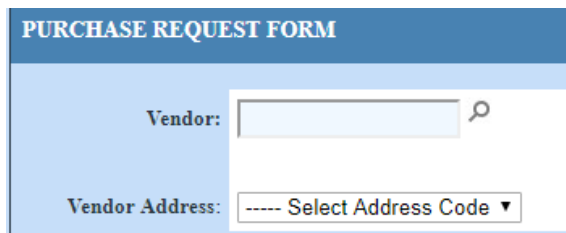
Notes:  (250 Character Max)

ENTERED BY: MATTHEW AGNESE ON: 6/27/2018 DEPT: FINANCE & ACCOUNTING

Action Bar:

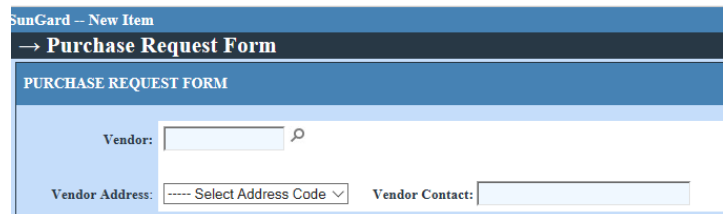
## Creating your Requisition

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



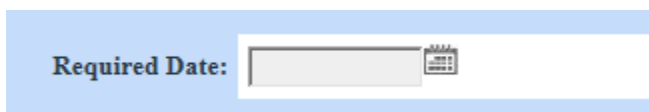
The screenshot shows a blue header bar with the text "PURCHASE REQUEST FORM". Below it, on a light blue background, are two fields: "Vendor:" followed by a text input box with a magnifying glass icon, and "Vendor Address:" followed by a dropdown menu labeled "----- Select Address Code ▾".

- 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



This screenshot shows the same form as above but with an additional field. Below the "Vendor Address:" dropdown, there is a "Vendor Contact:" label followed by a text input box. The top of the form shows a breadcrumb trail: "SunGard -- New Item" followed by "→ Purchase Request Form".

- Enter the name of the vendor contact in the Vendor Contact field
  -
- Using the Required Date field, notify us of your required date



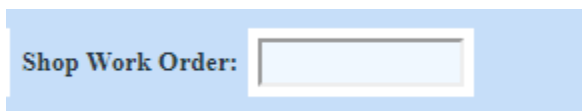
The screenshot shows a light blue box containing the label "Required Date:" followed by a date input field with a calendar icon.

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



The screenshot shows a light blue box containing the label "Requester:" followed by a text input field.

- 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 screenshot shows a light blue box containing the label "Shop Work Order:" followed by a text input field.

- 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

- 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:  (Optional - 150 Character Max)



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

## Object Code Lookup

- Object Code Lookup

Object Lookup:  

Line Items:	# Account	Object
1		


 

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

## Purchase Line Details



- Use the Lines Items section provide the information for the procurement

Lines Items:	# Account	Object	WO	Description	Catalog	Freight	Qty	UOM	Unit Price	Amount
1								> Select Units		



- Use the Add line button to add lines, the red X to remove them

Lines Items:	# Account	Object
1		
2		

- 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 an 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)
    - $\text{Amount} = \text{Qty} * \text{Unit Price} + \text{Freight if applicable}$
- If the order meets either of the following criteria, please use the radio buttons to identify as such

- ☐ **Service or Custom Product?**

☐ **Radioactive Material?**

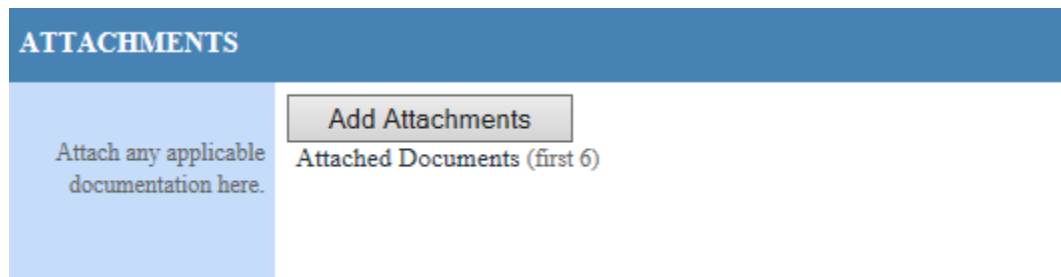
- Service
  - If the vendor is providing a service, please check the box.
- Custom Product
  - If the product is not “off the shelf” or is specifically designed by request it is a Custom Product, please check the box.

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

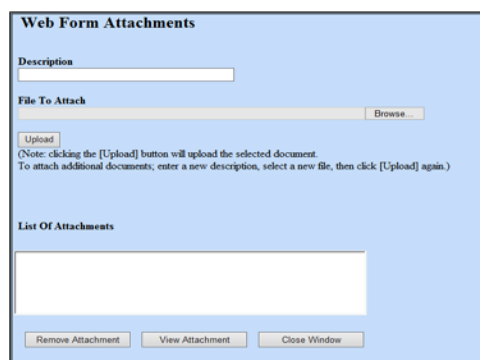
## Attachments

- Attachments



The screenshot shows a blue header bar with the word "ATTACHMENTS" in white. Below the header, on the left, is a light blue box with the text "Attach any applicable documentation here." To the right of this box is a button labeled "Add Attachments". Below the button, the text "Attached Documents (first 6)" is displayed.

- 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



The screenshot shows a window titled "Web Form Attachments". It contains a "Description" text field, a "File To Attach" text field with a "Browse..." button, and an "Upload" button. Below the "Upload" button is a note: "(Note: clicking the [Upload] button will upload the selected document. To attach additional documents, enter a new description, select a new file, then click [Upload] again.)". At the bottom, there is a "List Of Attachments" section with a large empty box. At the very bottom are three buttons: "Remove Attachment", "View Attachment", and "Close Window".

- 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>
  - 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**

179988-> Sole Source

Remove Attachment View Attachment Close Window

- 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

**Notes:**  
(250 Character Max)

- 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.

Find a P.R.

My Dashboard

- Click Find a PR to search for Purchase Requisitions previously submitted using this WebForm

**P.R. Search**

Choose a search category and a filter type then enter a search term to find your P.R.'s

**Category**  
☒ Vendor  
☐ Date Created  
☐ Key Word  
☐ Account Number

**Filter Type**  
☐ Requester  
☐ P.R. Number  
☐ Ship Work Order  
☐ All PR's

☐ Show All Active, Rejected & Approved  
☐ Show Only Active  
☐ Show Only Rejected  
☐ Show Saved and Not Submitted

**Choose Department to Search**  
 120 - 8101-001

Enter Search Term:

**Purchase Requisition Search Results**

PR ID	IS ID	IS Status	Ship W.O.	Vendor Name	Created	Revised	Account	Object	Description	Qty	UOM	Unit Price
-------	-------	-----------	-----------	-------------	---------	---------	---------	--------	-------------	-----	-----	------------

Choose a purchase requisition line item from the list and press 'Fill Form' button

- Select a category and filter
- Enter search criteria in the fillable field
- Search yours or, by Department

**P.O. Search**

Choose a search category and a filter type then enter a search term to find your P.O.'s

**Category**  
☐ Vendor  
☐ Date Created  
☐ Key Word  
☐ Account Number  
☒ All PO's

**Filter**  
☒ Show All Active, Rejected & Approved  
☐ Show Only Active  
☐ Show Only Rejected  
☐ Show Saved and Not Submitted

**Department**  
 All Departments

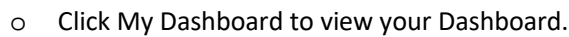
**Purchase Order Search Results**



PO ID	IS ID	IS Status	Status Date	Vendor Name	Created	Revised	Account	Object	Description	Qty	UOM	Unit Price
673	R001476	Submitted	4/27/2017	Marine Imaging Technologies LLC	4/27/2017	4/28/2017	57040	5210	terfel	1	EA	10
572	R001106	Approved	12/23/2016	WB MASON CO INC	12/21/2016	12/28/2016	57040	5210	Rad Ferran	0	EA	5000
567	R001101	Approved	12/1/2016	BEST SOURCE	12/1/2016	12/2/2016	57040	5210	test	10	EA	1000
449	R000997	Approved	11/3/2016	WB MASON CO INC	11/1/2016	11/4/2016	57040	5210	Rad Ferran	2	EA	100000
448	R000996	Approved	11/3/2016	Marine Imaging Technologies LLC	11/1/2016	10/10/2016	57173	5210	strong buckles	1	EA	10000
448	R000996	Approved	11/3/2016	Marine Imaging Technologies LLC	11/1/2016	10/10/2016	57173	5210	strong buckles	4	EA	300
449	R000996	Approved	11/3/2016	Marine Imaging Technologies LLC	11/1/2016	10/10/2016	57173	5210	straight jacket	1	EA	10000
449	R000996	Approved	11/3/2016	Marine Imaging Technologies LLC	11/1/2016	10/10/2016	57173	5210	strong buckles	4	EA	300
332	R000995	Submitted	1/18/2017	Marine Imaging Technologies LLC	10/31/2016	10/10/2016	57173	5210	straight jacket	1	EA	10000
332	R000995	Submitted	1/18/2017	Marine Imaging Technologies LLC	10/31/2016	10/10/2016	57173	5210	strong buckles	4	EA	300
230	R000994	Submitted	10/31/2016	Marine Imaging Technologies LLC	10/13/2016	10/10/2016	57173	5210	straight jacket	1	EA	10000
230	R000994	Submitted	10/31/2016	Marine Imaging Technologies LLC	10/13/2016	10/10/2016	57173	5210	strong buckles	4	EA	300

Choose a purchase order line item from the list and press 'Fill Form' button

- When the list populates, click the circle beside the one you want
- Press 
  - Information from the previous PO will populate the Webform.
- To Exit, press Exit

- My 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 X 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.