

Financial Advisory Services & Training Financial Services Department www.finance.utoronto.ca/fast

Work Instruction

# **Create for Radioisotope**

# When to Use

To purchase radioisotopes material with a valid University permit. Radioisotope Purchase Requisition must be approved by Radiation Protection Services prior to ordering or receipt of the material.

## **Steps**

1. Obtain the appropriate departmental request with authorization to create the purchase requisition

2. Determine the FIS accounts to be posted to (Vendor account, General Ledger (G/L), Funds Center, Fund (if applicable) and Cost Center or Internal Order, applicable tax code, delivery date and quantity to order)

3. Create purchase requisition in FIS

4. Record FIS purchase requisition number on your departmental request documents

5. Radiation Protection Services will review FIS daily at 10:30am and release all orders that meet the requirement for approval. Departments whose requisitions do not meet the criteria for approval will be contacted by a Radiation Safety Officer

6. Create Purchase Order from approved Purchase Requisition. Click <u>here</u> for instruction on Create: Purchase Order

7. Send copy of Purchase Order to vendor through arranged method: fax, e-mail, mail.

### Note

The SAP input screen for this transaction contains many fields/tabs, this reference guide will only include information for those fields/tabs that are used in processing UofT transactions.

**Detailed Procedures for Creation in FIS** 

#### Access the transaction using:

Menu	Logistics >> Materials management >> Purchasing >> Purchase Requisition >> Create
Transaction code	ME51N

EP Purchase requisition Edit Goto Envir	onment System Help	SAP
🖉 🖬 🛛 🔂	ତ୍ତ୍ରର 🕞 🛱 🤁 ଅଧ୍ୟର୍ଥ 🗐 🖉 🗃	
Create Purchase Requisition	1	
Document overview on	🚱 🚹 🛃 Personal setting	
Purchase requisition Header Therm overview Therm detail	Establish user default fields for creating a Purchase Requisition i.e. purchasing group. This setting remains within user's profile and is defaulted into when a purchase requisition is being created. Default data can be changed when creating a purchase requisition.	

#### Click <u>here</u> for reference guide on setting your Personal setting.



#### Screen: Create Purchase Requisition

Header Text Tab

Evrchase	Requision Ed	t gota Epironment System Help	SAP
9			and a second
Create	Purchase R	equisition	
Document	overview on   L	C Ga II Help G Personal setting	
Purcha	ise requisition 🛽 🗟		
	Header note	An.	
Ta Bern ove	niew alts		
Field Name	Required (R) / Optional (O)	Description of Field Content	
Header note	0	Enter internal note related to purchase requisition. This note provides a subsequent processor with information applicable to the entire requisition and this text is NOT displayed on purchase order.	

#### Item Overview

Purchase Regula	tion Edit Goto	Environment System H	leip .					38	SA	P
0	8 0		0 0 0 0 0 6 6		3					
Create Purch	ase Reguis	ition								
Document overview	on Def 4	a Help 🛃 Persor	hal setting							
					_	_				
Purchase regul	sition 🛛 🔁									
		1 70 20 40 10			1 630	elault values	1			
St. Ite. Ma	teriai Bhort t	eid Quan	tity Unit Delivery date N	tati group Plant	Stor	loc PG	Requisnr.	Tracking	Des.vendor	Fixed vendor
				U OF T	-		macinsuz			
				UOFT	2	-	macinsuz			-
				UOFT			macinsuz			
	-			UOFT	-		macinsuz	-		-
				U OF T	(m.)		macinsuz			
	_			U OF T		_	macinsuz			-
				U OF T			macinsuz			
				×	_	/	~			
					~	/		2.2	7	
				Default I	Data f	rom Pe	rsonal	setting		
				1						
	D									
_										
ttem details										
								D TNO	(1) (010) 🔳	waldorf INS
Field	Doguirod	Decorintion of	Field Contor	<b>a</b> t						
Name	(R) /	Description of	Field Contei	iii.						
	Optional									
	(0)									
Item		Enter line item	number. As a	ruie, requi	sition	s are	at			
(Item of	0	each item of a i								
Requisition)		requirement.								
A		Enter K (cost center) or F (internal order). For other								
(Account	R	account assign								
Assignment		for possible entries.								
category										
Short text	R	Enter a short de	escription of t	he material	s.					
Quantity			an unanta di la u							
(Quantity Requested)	ĸ	Enter quantity r	equested in r	numeric forr	nat.					
Requested)										
		Enter unit of me	easure to det	ermine the	size d	of mate	erial			
Unit	_	requested, for	es							
(Unit of	R	(m(i) magabaa	Marale (Mha)	usa matabi	odo	But	ton for			
weasure)		(mci), megabequereis (Mbq) use matchcode Multion for nossible entries								
Delivery	R	Enter desired de	elivery date o	r a confirm	ed de	livery	date			
Date		by the vendor.								

Material Group	R	Enter material group, use <b>RADIATION</b>
Plant	R	Code should be within 1XXX or 2XXX. Use matchcode button to find your Plant code; if a specific one is not available, use general campus code (ie. 1000 for Scarborough Campus, 1500 for Mississauga Campus 2000 for UofT St. George Campus).
Stor.loc. (Storage Location)	R	Enter your storage location, if unknown use matchcode button for possible entries.
PGr (Purchasing Group)	R	Enter your purchasing group, if unknown use matchcode objection for possible entries.
Requisnr	0	Enter name of requisitioner.
TrackingNo (Tracking Number)	Ο	This is an open text field that can be used to further track postings. (10 character field similar to the ASSIGNMENT field).
Des.vendor (Desired Vendor)	R	Enter desired vendor number, if unknown use matchcode button for possible entries.
Fixed vendor	N/A	This field should be left blank. Use Des.vendor field.

Click on checkmark white button or use button to expand Item details.

### Item details: Account Assignment Tab

Eurchase Requisitio	n Edil <u>B</u> eto E	Environment System Help		5 1011-00-00-00-00-00-00-00-00-00-00-00-00					SAP	-
0	90		0000	0 2 0	6				1	
Create Purcha	se Requisiti	ion								
Document overview of	n D 43 53	🗿 🚹 Help 🛃 Persona	i setting		-					
Purchase requisit	ion 🗈		Warning m	essage						
					0 6	Default values		iii		n
B St Ile	Material Bho	rt text Quanti	ty Lnit Delivery date	Matl group	Plant	Stor. loc	Por Requiser.	Tracking	Des vendor	Fixed
	NEG	3 030H 1	WCI 04.04.2005	Radioactives	U OF T,	PURCHA	000 macinsuz macinsuz			
K					U OF T,		macinsuz			
K					U OF T,		macinisuz			
nem [	1 ) NEG 030H	8			-		8			
Bueinecc area CO area Cost center Commitment item Funds center	Required (R) / Optional	Fund Description of F	ield Conter	nt						
	0	Multiple Account / line item to be sp The distribution ca percentage.	Assignment blit among s an be carrie	allows several d ed out b	purcha differei y quar	ise requ nt accou ntity or	uisition unts. by			
		To display or prin assignment, click	t the proce <u>here</u> : Mul	dure for tiple Acc	multi count /	ple acco Assignm	ount nent.			
	О	Repeat Account A to use the same a requisitioned line	ssignment a account ass items.	allows p ignment	ourchas t for se	se requi everal o	sition r all			
		To display or prin assignment, click	t the proce <u>here:</u> Repe	dure for eat Acco	repea ount As	nt accou ssignme	int nt.			
		Enter <b>K</b> (cost cen	ter) or <b>F</b> (ii	nternal	order)	. For ot	her			
AcctAssnCat	R	account assignme for possible entrie overview screen o	ent category es. Data on of the same	use ma this fiel field na	atchcoo d cam ame.	de 🙆 e from	utton Item			
Distribution	R	Distribution indica purchase requisiti among the indivic	ator how the ion or purch dual accoun	e quanti nase ord t assign	ty and ler are ment i	l value apport tems. L	of this ioned Jse			

		matchcode button for possible entries.
Unloading point	R	Enter the room and/or floor number where the goods or services will be delivered.
Recipient	R	Enter the name of the person receiving the goods or services.
G/L account no.	R	Enter the G/L account number identifying the type of expense. <i>For Material Group - <b>RADIATION</b> , use G/L <b>825700</b>.</i>
Business area	R	Business area will default based on the cost centre entered. All areas except the ancillary operations enter business area 1000.
Cost Center or Internal Order	R	Enter either the cost center or internal order number that the expense is to be posted to.
Commitment Item	R	Commitment item defaults from the G/L account entered and should not normally be changed. The commitment item must be changed to post expenses against budgets in specific commitment items (i.e.; EXP-UTFA, SPECIALS). When a commitment item is changed a warning message will appear. Hit enter to acknowledge the warning message and continue.
Funds Center	R	Enter the funds center number that the expense is to be posted to. The funds center identifies the budget which the expense will be paid from. (Note: When fund centre and fund are both entered the expense is posted against the budget in the funds center/fund combination).
Fund	0	Enter a fund in combination with a funds center to post the expense against the budget in the funds center/fund combination. A fund cannot be entered without a fund center.

Choose Valuation Tab.

Item details: Valuation Tab

Eurchean Requ	isidon Edit ( D		ni Helb Gi (b) (68	0000							54	-
create Pure	hase Req	uisition	hitt+F3									
ocument overvi	ew on	8 🖧 🚺 Help 🛃 P	Personal settin	0								
Purchase reg	uisition 🗟			3								
Header												
9 0							Default values		1			
B SL Ne_	A Material	Short text	Quantity	Unit Delivery	date Mati group	Plant	Stor Joc.	PO	Requisir.	Tr_	Des vendor	Fixed vendor
		NEO 030H	1.	MCI 04.04.20	US Pradioactives	U OF T	PURCHA.	000	macinsuz		100250	
	ĸ		-			UOFT		-	macineuz			
	ĸ					U OF T		+	macineuz			
	ĸ					U OF T		-	macinsuz			
	ĸ					U OF T.		-	macinsuz			
112	K					U OF T.		-	macinsuz			
	ĸ					U OF T.			macinsuz			
	K					U OF T,			macinsuz			
	K.					U OF T,			macinsuz			
	K	31	- 1	8-0		U OF T.	4	1	macinisuz	0		
Bern // Guantit Valuation pric	(1) NEG 030 Besidatos Va	DH sluation Account assig CAD / 1	a primient s MCI T	ource of suppl	y   Status   50.00	Contact per	nson 👔 Rel	wase	strategy 👔	Texts	Delivery	ad.   🕕
Invoice re OR non-vi	ceipt slusted									1000		
ield Iame	Requ Opt	uired (R) / ional (O)	Descrip	otion of	Field Cor	ntent						
aluation		R	Enter ne before t	et price he taxes	of materia s.	l good	ls or se	rvio	es			

Goods receipt	R	Indicator default setting is <b>ON ( %</b> ).
Invoice receipt	R	Indicator default setting is <b>ON ( %</b> ).

Choose Texts tab.

Item details: Texts Tab

Purchase Requise	tion Edit Goto Er	wronment System	Help										NP.
0	0		00 08	80 V	0001		3						
Create Purch	ase Requisitio	on											
Document overview	ron 🗋 📽 🖓	🚹 Help 🛃 Pers	onal settin	g					_		_		
Purchase requi	sition 💿	]	-		D								
	10 8 8 8		0		0000	1 1 1 3ª		Default values					
St_ Ite. A	Material Short	text	Quantity	Unit	Delivery date	Mati group	Plant	Stor. loc.	PGr	Requisir.	T	Des vendor	Fixed vendor
K	inco.	33011		mor	04.04.2000	Radioacares	U OF T.		000	macinsuz	-	100100	
К	2					1	U OF T,			macinsuz			
K K	-			_		-	U OF T,	f	-	macinsuz	-		
K							U OF T.	5		macinsuz	-		
К							U OF T.			macinsuz			
K						-	U OF T.			macinsuz	+	-	
K		1					U OF T.			macinsuz			
K							U OF T,	6		macinsuz		1	
Material	PO tavt	ntinuous-text 🛍											
3R										Û	T	NG (1) (010) 🛅	waldorf IN
Field Name	Required (R) / Optional (O)	Descriptio	on of F	-ie	ld Cont	ent							
Item Text	R	Enter addit text will be • Pern • Radi • Cher • Activ • Num • Venc	ional t displa nit Ho oisoto nical vity po ber o dor Na	tex aye olde ope Foi er of s am	t descri ed on th er Nam e rm unit sto tock via e Date	ption rel e purch e ock vial als orde	ated t ase or (mCi, <b>red</b>	o the li der. uCi or	ne MB	item. T q)	ſhi	s	
Item note	0	Expe Deliv Requ Enter intern NOT be dis	nal no	Da one te i d oi	te of D ation (l r's Nar related n the pu	elivery Building ne to the li urchase	and r ne ite order.	oom nu m. This	mb tex	er) <t th="" will<=""><th></th><th>_</th><th></th></t>		_	
address (Override)	0	required de order Ship	y ove elivery To Ad	ad dre	ie stora Idress. ess.	ge locati This will	appea	ar on th	na ie p	ourchas	se		

After completing the item details entry and no further line item entry is required, check ensure warning errors have been rectified.

The following processing options are available:

Action	Icon	Description
Check	6	Check to ensure that all required fields have been completed and additional data necessary have been entered to the header note or item text fields as necessary.
Post		Posts the document and provides a document number. Record document number on original invoice and file.

End of procedure.

# **Resource Information**

# **Related Topics/Sites:**

Personal Settings

Create Purchase Order from Purchase Requisition - Radioisotope

Create Purchase Order

Purchasing Radioactive Substances

How To Purchase Goods or Services

# **Guide to Financial Management:**

Purchasing Policy and Regulations