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 **here** 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.
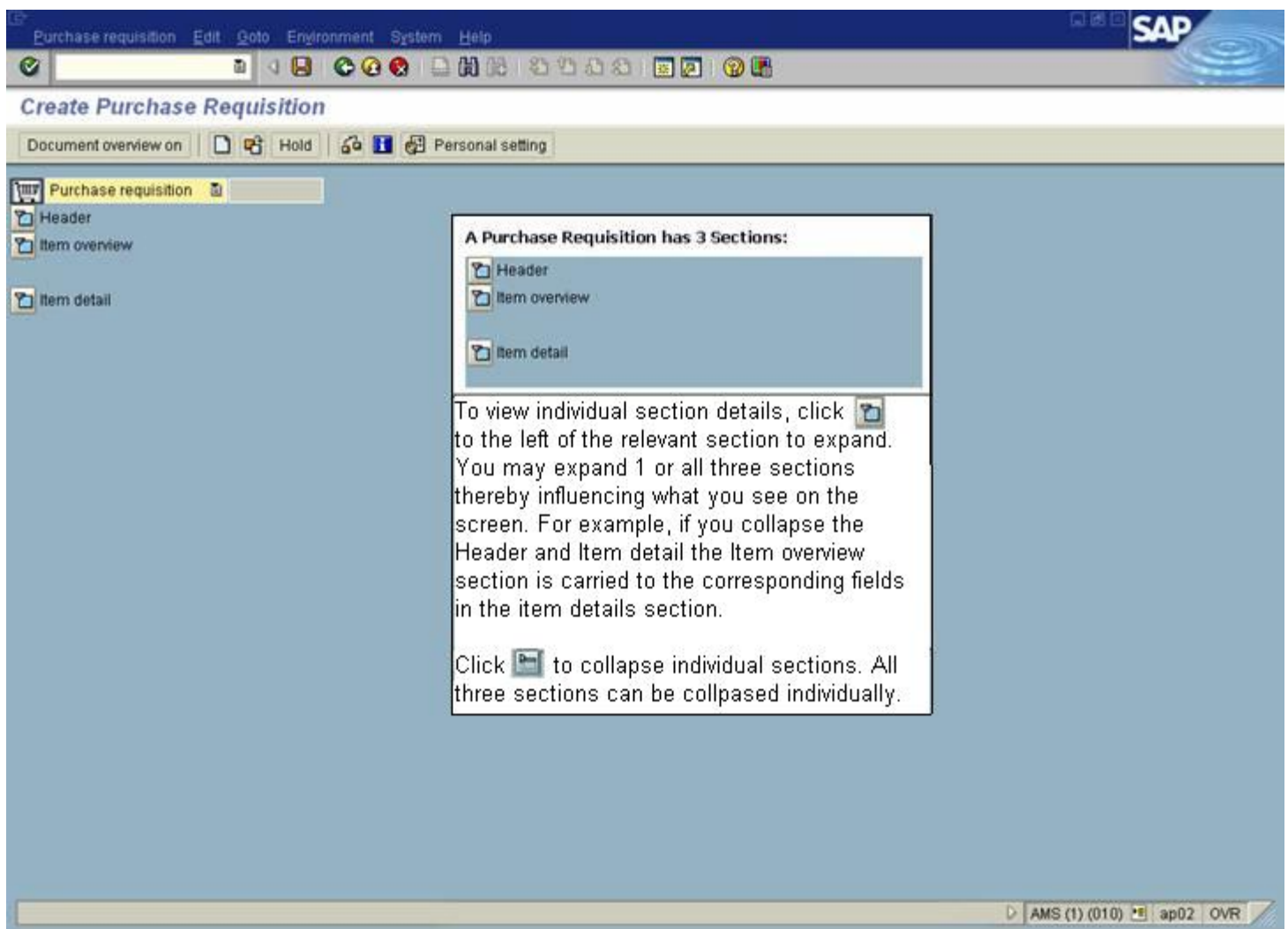
Detailed Procedures for Creation in FIS

Access the transaction using:

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

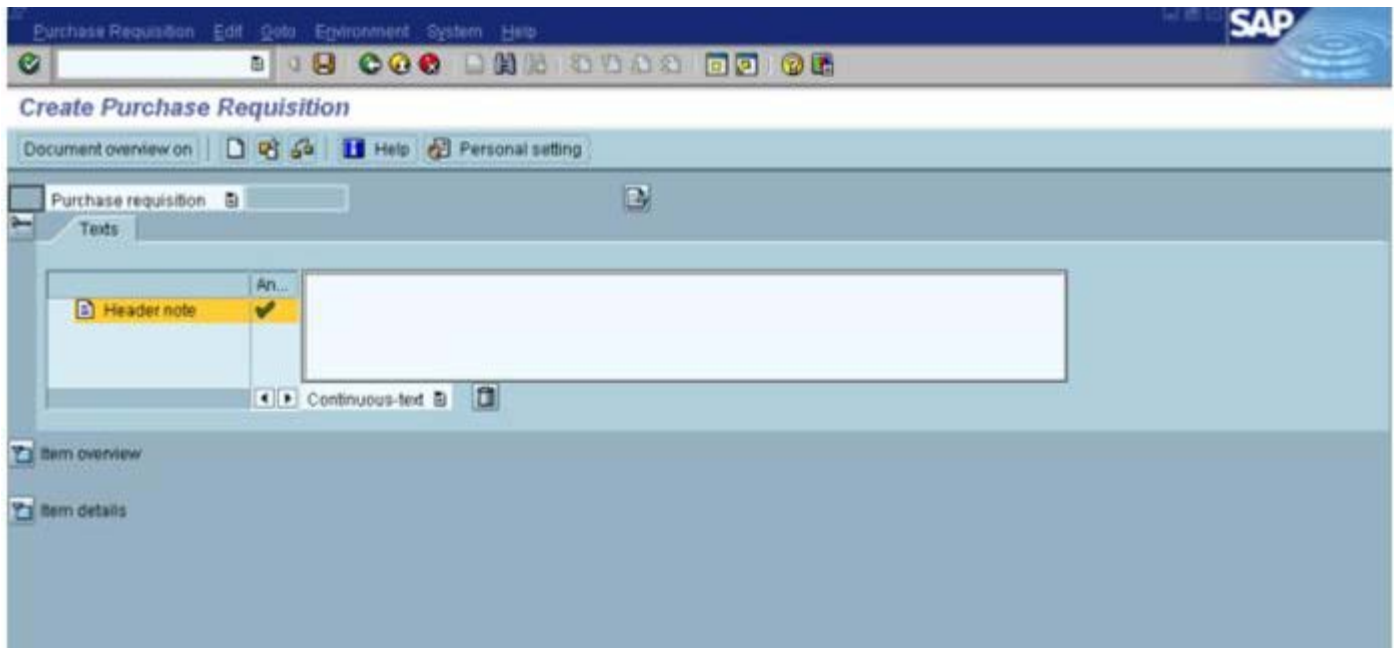**Screen: Create Purchase Requisition**

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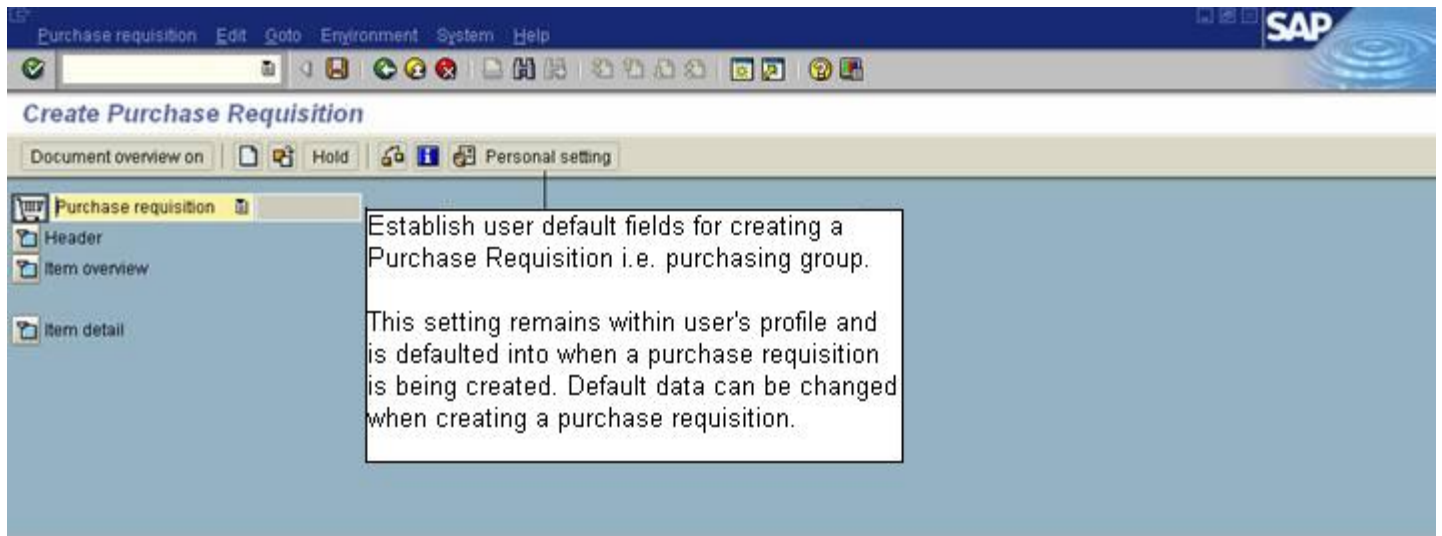
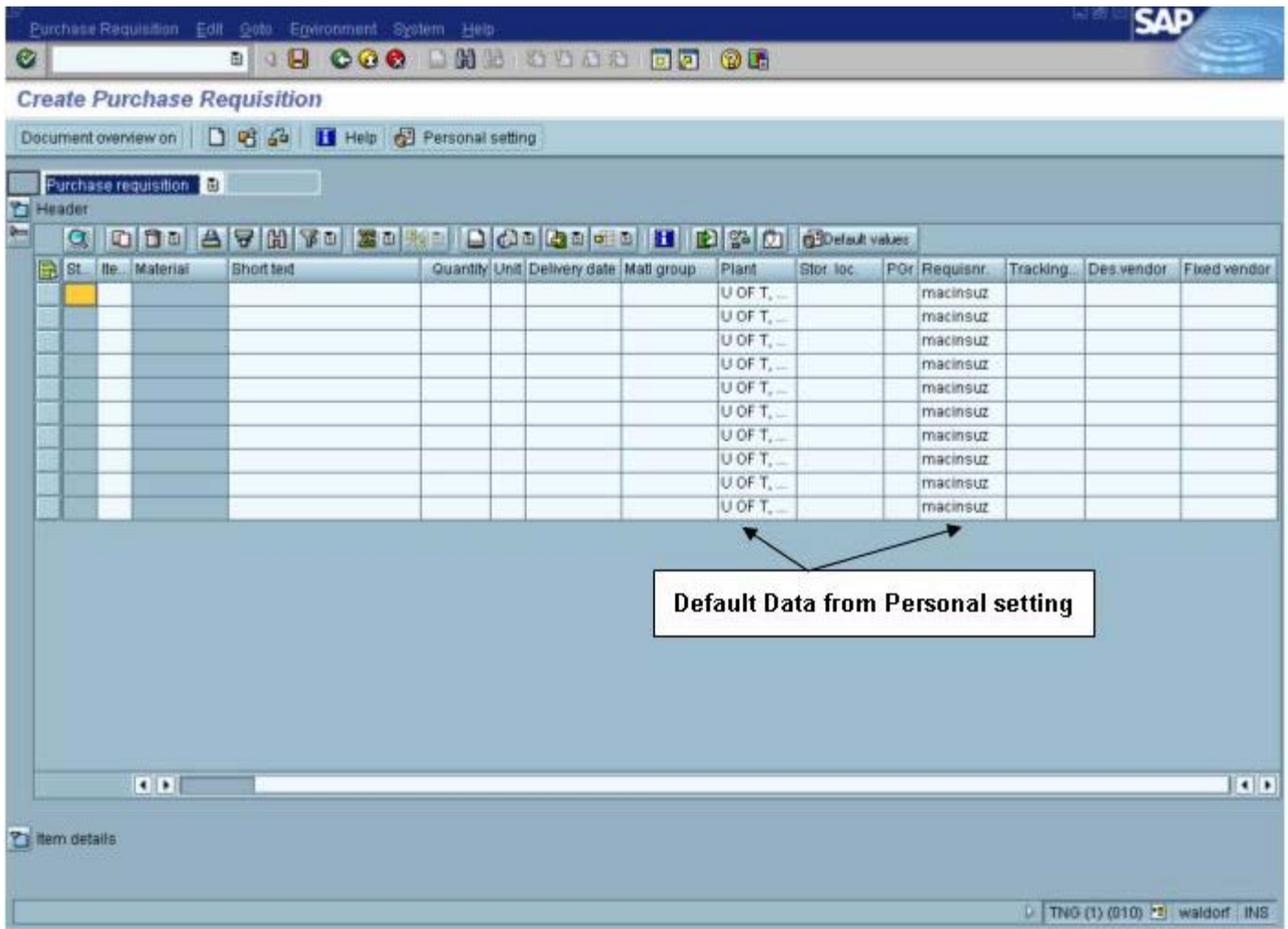Click **here** for reference guide on setting your Personal setting.

Screen: Create Purchase Requisition

Header Text Tab

Create Purchase Requisition

Field Name	Required (R) / Optional (O)	Description of Field Content
Header note	O	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
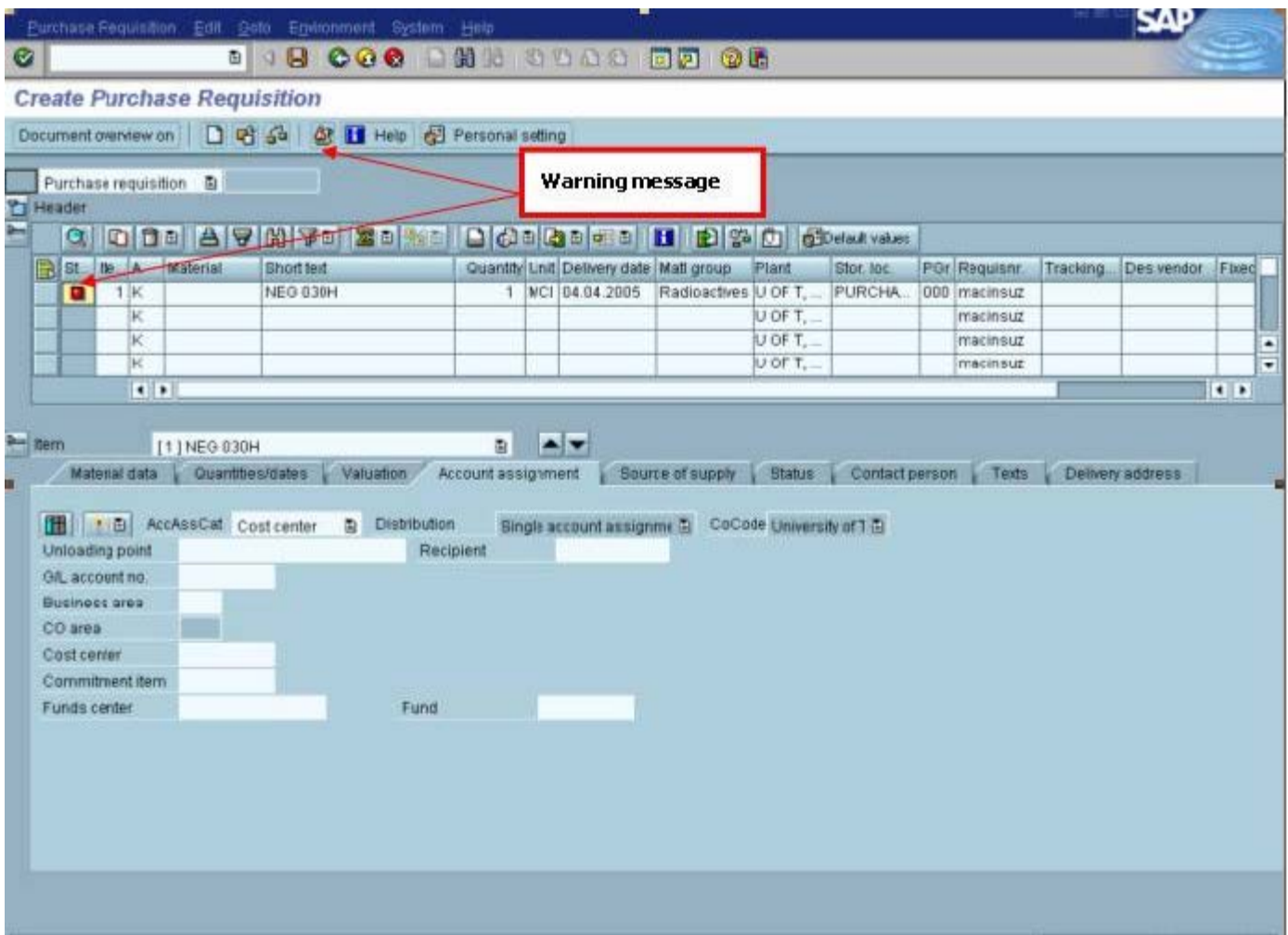
Create Purchase Requisition

Default Data from Personal setting

Field Name	Required (R) / Optional (O)	Description of Field Content
Item (Item of Requisition)	O	Enter line item number. As a rule, requisitions are processed on an item-by-item basis. This means that each item of a requisition represents a separate requirement.
A (Account Assignment Categor)	R	Enter **K** (cost center) or **F** (internal order). For other account assignment category use matchcode button for possible entries.
Short text	R	Enter a short description of the materials.
Quantity (Quantity Requested)	R	Enter quantity requested in numeric format.
Unit (Unit of Measure)	R	Enter unit of measure to determine the size of material requested , for example microcuries (uCi), millicuries (mCi), megabequerels (Mbq) use matchcode button for possible entries.
Delivery Date	R	Enter desired delivery date or a confirmed delivery date by the vendor.

Material Group	R	Enter material group, use **RADIATION**
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 button for possible entries.
Requisnr	O	Enter name of requisitioner.
TrackingNo (Tracking Number)	O	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 button or use button to expand Item details.

**Item details: Account Assignment Tab**

Create Purchase Requisition

Field Name	Required (R) / Optional (O)	Description of Field Content
⊞	O	Multiple Account Assignment allows purchase requisition line item to be split among several different accounts. The distribution can be carried out by quantity or by percentage. To display or print the procedure for multiple account assignment, click **here** : Multiple Account Assignment.
⊡ ⊟	O	Repeat Account Assignment allows purchase requisition to use the same account assignment for several or all requisitioned line items. To display or print the procedure for repeat account assignment, click **here:** Repeat Account Assignment.
AcctAssnCat	R	Enter **K** (cost center) or **F** (internal order). For other account assignment category use matchcode ⊡ button for possible entries. Data on this field came from Item overview screen of the same field name.
Distribution	R	Distribution indicator how the quantity and value of this purchase requisition or purchase order are apportioned among the individual account assignment items. Use

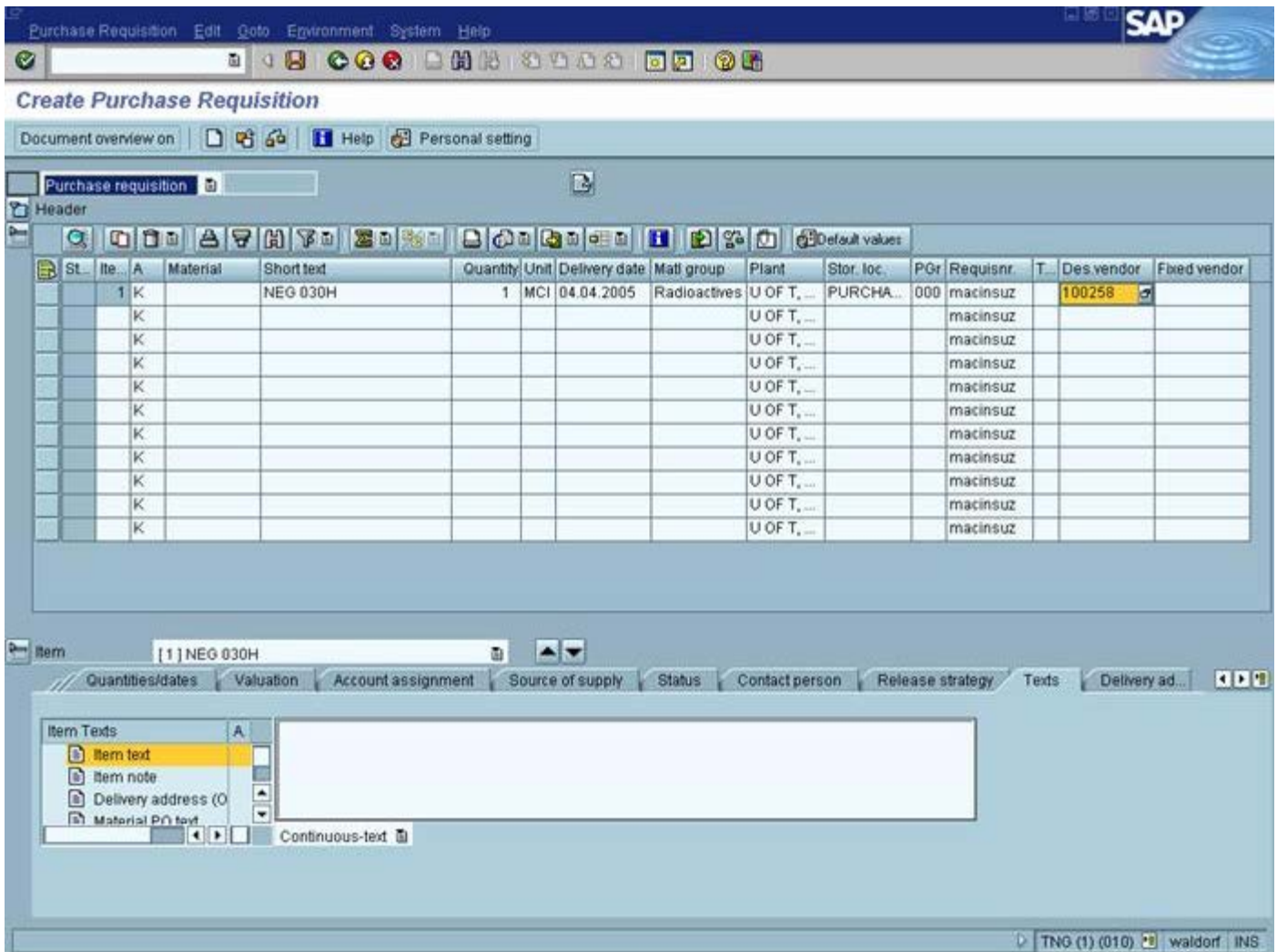|		matchcode button for possible entries.
Unloading point	R	Enter the room and/or floor number where the goods or services will be delivered.
Recipient	R	Enter the name of the person receiving the goods or services.
G/L account no.	R	Enter the G/L account number identifying the type of expense. *For Material Group -* **RADIATION** *, use G/L* **825700** *.*
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	O	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

Create Purchase Requisition
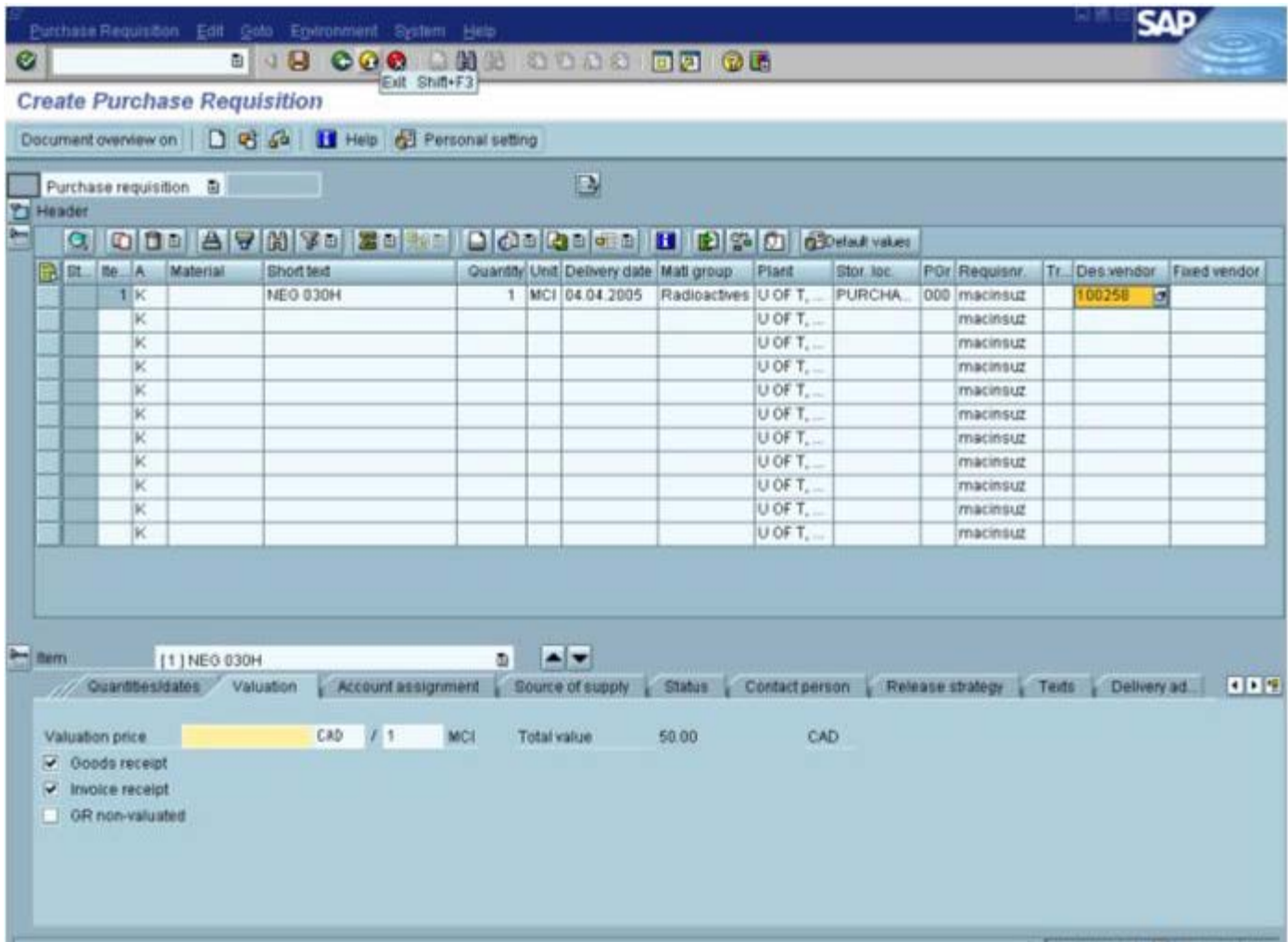
Field Name	Required (R) / Optional (O)	Description of Field Content
Valuation price	R	Enter net price of material goods or services before the taxes.
Goods receipt	R	Indicator default setting is **ON (✔)**.
Invoice receipt	R	Indicator default setting is **ON (✔)**.

Choose Texts tab.

Item details: Texts Tab

Create Purchase Requisition

Field Name	Required (R) / Optional (O)	Description of Field Content
Item Text	R	Enter additional text description related to the line item. This text will be displayed on the purchase order. • **Permit Holder Name** • **Radioisotope** • **Chemical Form** • **Activity per unit stock vial** (mCi, uCi or MBq) • **Number of stock vials ordered** • **Vendor Name** • **Requisition Date** • **Expected Date of Delivery** • **Delivery Location** (Building and room number) • **Requisitioner's Name**
Item note	O	Enter internal note related to the line item. This text will NOT be displayed on the purchase order.
Delivery address (Override)	O	If necessary override storage location address and enter required delivery address. This will appear on the purchase order Ship To Address.

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

The following processing options are available:

Action	Icon	Description
Check		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