

Work Instruction

Creating a Requisition to Purchase Radiation Materials

Purpose

Use this procedure to purchase radioactive materials.

Trigger

Perform this procedure when you have received the Radiation Safety Oracle Purchase Order form from an Authorized Radiation User or Principal Investigator.

Prerequisites

Verify that you have all necessary information before starting the online requisition. You can either enter this information on a Word document template and then copy it from Word and paste it into the Oracle software, or you can type it directly into the Oracle software. All fields must be completed or the requisition will be rejected back to you by the buyer.

- Vendor Catalog Number
- Radionuclide
- Compound
- Activity
- PI Name
- License #
- Expiration Date

Menu Path

Use the following menu path(s) to begin this task:

- In Internet Explorer, navigate to <http://map.wvu.edu>.
- In the E-Business Suite Home Page, choose WVU Requestor, and then Requisitions.

Helpful Hints

If you need assistance, please contact the WVU OIT Help Desk:

- 304-293-4444 x 1
- oithelp.wvu.edu

Procedure

1. Start the process using the menu path.

Oracle E-Business Suite Home




2. Double-click [WVU Requestor](#) .
3. Double-click [Requisitions](#) .

Category 1 :

Category 2 :

Requisitions

4. Optionally, complete the following field:

Field Name	R/O/C	Description
Description	O	Optional description that does not print on the purchase order. Example: Radiation material for J. Barnett  This description field should not contain full product specifications. Enter the full specifications in the Description field in step 12.

5. Tab from the Description field or click within the Descriptive Flexfield (circled below) to open it.

Descriptive Flexfield



Requisition Headers



6. Complete the following fields:

Field Name	R/O/C	Description
SELECT LOGO TO PRINT	R	The campus that will be charged for the requisition; its logo and terms and conditions will appear on the purchase order. Example: RC

7. Click  .

Title: Creating a Requisition to Purchase Radiation Materials

Category 1 :

Category 2 :

Requisitions

Requisitions (Morgantown Procurement) - [New]

Number Type **Purchase Req** Preparer **Allen, Char L**
Description **radiation for J. Ba** Status **Incomplete** Total **USD** **0.00**
[20]

Items Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	C	[]
1	Goods					Each		

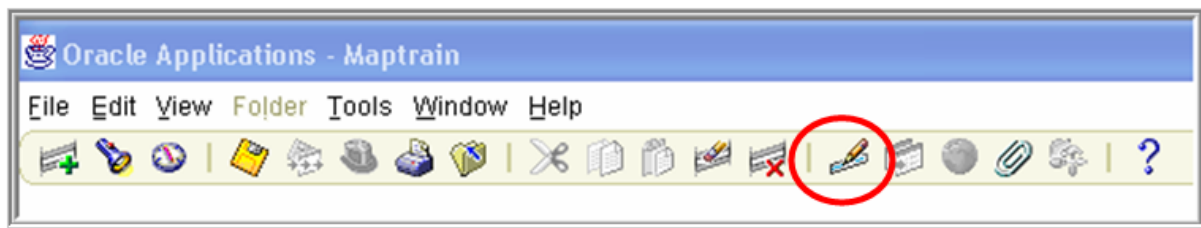
Destination Type **Expense** Source **Supplier**
Requestor **Allen, Char L** Supplier
Organization Site
Location Contact
Subinventory Phone

8. Complete the following fields:

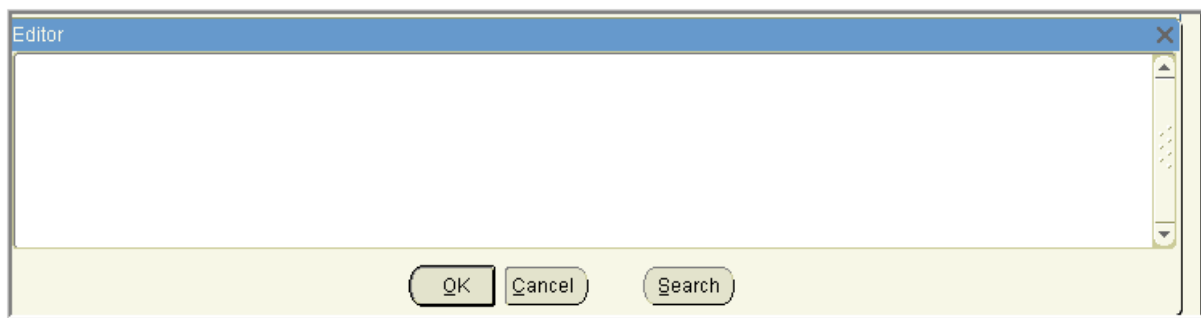
Field Name	R/O/C	Description
Type	R	Broad category of purchase Example: HazMat
Category	R	Category of Purchase Example: Radioactive Material

9. Click within the Description field and then click on the Edit icon in the toolbar (circled below).

Toolbar



Edit screen



10. Within Microsoft Word, complete all fields in the Radiation Purchase Template without tabbing from field to field. Then highlight the text, and choose **Edit** → **Copy**.

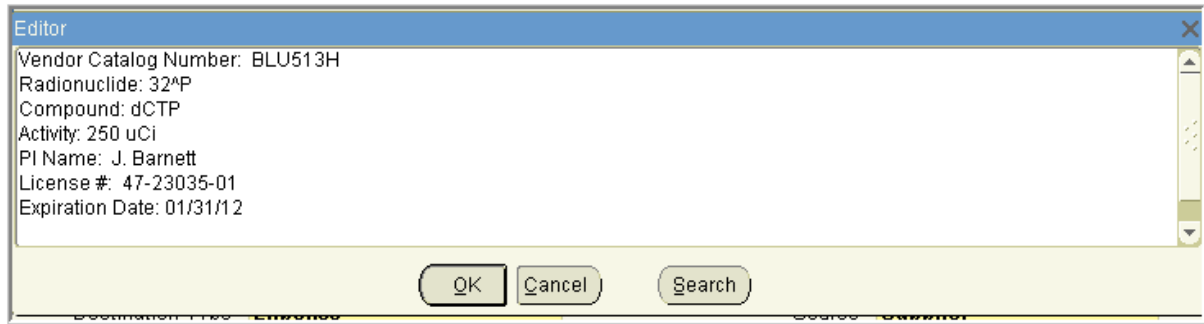


The required information is the following:

- Vendor Catalog Number
- Radionuclide
- Compound
- Activity
- PI Name
- License #
- Expiration Date

11. Go back to the Oracle software.
12. Use the Control-V command to paste the required information about your purchase into the Description field Edit screen.

Completed Edit Screen



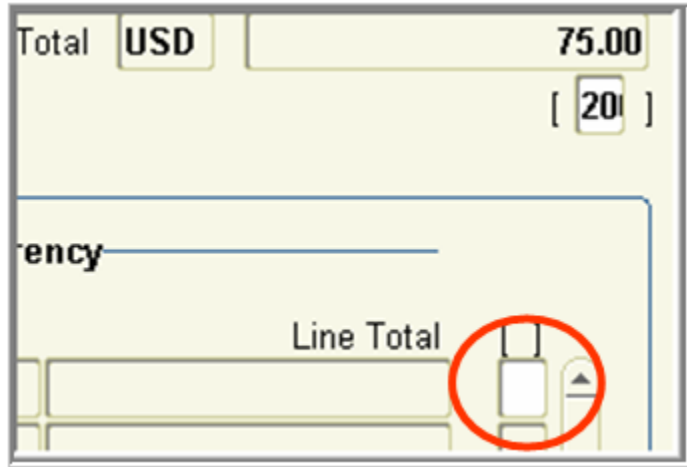
13. Click  .

14. Complete the following fields:

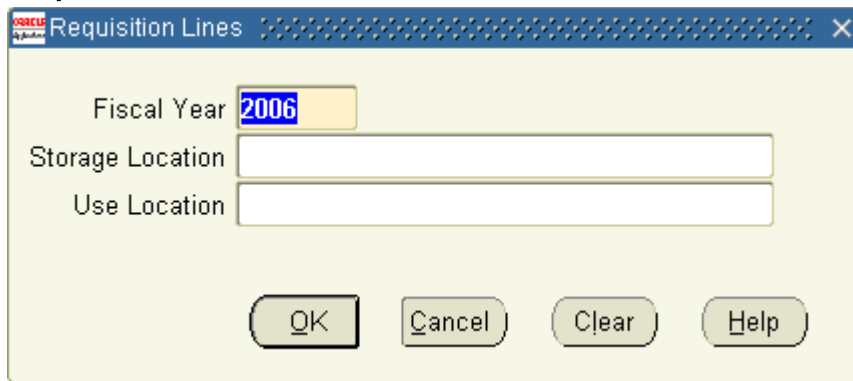
Field Name	R/O/C	Description
UOM	R	Unit of Measure Example: Each
Quantity	R	Number to be purchased Example: 1
Price	R	Price per item Example: 75

15. Tab through all Lines fields or click the Descriptive Flexfield (circled below) to open it.

Descriptive Flexfield



Requisition Lines



16. Complete the following fields:

Field Name	R/O/C	Description
Storage Location	R	Storage Location. of the hazardous material Example: HS HSC NORTH 2052
Use Location	R	Use Location of the hazardous material Example: HS HSC NORTH 2052

Category 1 :
Category 2 :

Requisition Lines

Fiscal Year **2006**
Storage Location **HS HSC NORTH 2052**
Use Location **HS HSC NORTH 2052**

OK **Cancel** **Clear** **Help**

17. Click **OK**.

Requisitions

Number [] Type **Purchase Req** Preparer **Allen, Char L**
Description **radiation for J. Ba** Status **Incomplete** Total **USD 75.00**
[20]




Items | Source Details | Details | Currency

Num	Rev	Category	Description	UOM	Quantity	Price	Need-By	[]
1		RADIOACTIVE M	Vendor Catalog Num	Each	1	75		20

Destination Type **Expense** Source **Supplier**
Requestor **Allen, Char L** Supplier []
Organization [] Site []
Location [] Contact []
Subinventory [] Phone []

Catalog... **Distributions** **Approve...**

18. Complete the following fields:

Field Name	R/O/C	Description
Requestor	R	<p>The Employee requesting the goods or services</p>  <p>The Requestor field defaults to the name of the requisition preparer. Change this, if necessary, to the person who can best answer the buyer's or supplier's questions about the purchase. Locate the employee's name using the List Of Values (LOV), or enter the name directly using the format Last name, First name Middle initial (e.g., Smith, Joan A).</p>
Organization	R	<p>Example: Morgantown Procurement</p>  <p>Type m and then press the Tab key on your keyboard. Morgantown Procurement populates the field.</p>  <p>Never choose GLO-State</p>
Location	R	<p>Delivery Location</p> <p style="text-align: right;">HS HSC SOUTH G252</p>

Category 1 :

Category 2 :

Requisitions


The screenshot shows the 'Requisitions' window for 'Morgantown Procurement' - [New]. The window title bar includes a 'Save' icon. The main form contains the following fields:

- Number: [Empty]
- Type: **Purchase Reqt**
- Preparer: **Allen, Char L**
- Description: **radiation for J. Ba**
- Status: **Incomplete**
- Total: **USD 75.00**

Below the main form are tabs for 'Items', 'Source Details', 'Details', and 'Currency'. The 'Items' tab is active, displaying a table with the following data:

Num	Rev	Category	Description	UOM	Quantity	Price	Need-By	[]
1		RADIOACTIVE M	Vendor Catalog Numb	Each	1	75		20

At the bottom of the window are fields for 'Destination Type' (**Expense**), 'Requestor' (**Allen, Char L**), 'Organization' (**Morgantown Procurement**), 'Location' (**HS HSC NORTH 2052**), 'Subinventory', 'Source' (**Supplier**), 'Supplier', 'Site', 'Contact', and 'Phone'. There are also buttons for 'Catalog...', 'Distributions', and 'Approve...'.

19. Click the Save icon  in the toolbar. A system-generated number then populates the Number field.

Category 1 :

Category 2 :

Requisitions

Requisitions (Morgantown Procurement) - [New]

Number **10039936** Type **Purchase Reqt** Preparer **Allen, Char L**
 Description **radiation for J. Ba** Status **Incomplete** Total **USD 75.00**
 [20]





Items Source Details Details Currency


Num	Rev	Category	Description	UOM	Quantity	Price	Need-By	[]
1		RADIOACTIVE M	Vendor Catalog Numb	Each	1	75		20

Destination Type **Expense** Source **Supplier**
 Requestor **Allen, Char L** Supplier
 Organization **Morgantown Procurement** Site
 Location **HS HSC NORTH 2052** Contact
 Subinventory Phone

Catalog... Distributions Approve...

20. Complete the following fields:

Field Name	R/O/C	Description
Supplier	R	<p>Company supplying the radioactive materials. Example: PerkinElmer LAS, Inc.</p>  <p>Select the vendor through the List Of Values to ensure you are selecting a registered vendor.</p>
Site	R	<p>State financial system registration number Example: 0000068928</p>  <p>If one only site is available, it will populate the Site field after you click on the LOV. If more than one site appears in the LOV, choose the site that corresponds to the address the supplier has given you. If you are not sure if the site listed in the LOV matches the address the supplier gave you, contact Procurement Services before forwarding the Requisition.</p> <p>If the LOV is empty, you need to return to the Supplier field LOV to choose a valid Supplier.</p>
Contact	O	<p>Supplier employee who could answer a buyer's questions</p>  <p>Many suppliers do not have a contact listed in the LOV. If you do have a contact name, do not enter it here; enter it in the Note to Buyer field.</p>
Phone	O	<p>Supplier phone number</p>  <p>Many suppliers do not have a phone number listed in the LOV. If you do have a contact phone, do not enter it here; enter it in the Note to Buyer field.</p>

21. Click  to identify the account that will pay for the purchase.

Distributions

Distributions (Morgantown Procurement) - [New]

Accounts Project

Num	Quantity	Charge Account	Recovery Rate	GL Date	Budget Account
1	1			10-NOV-2005	

Account Description

Charge Budget

Accrual Variance

22. Perform one of the following:

If	Go To
You are charging the purchase to a Grant	Step 23
You are charging the purchase to a General Ledger account	Step 26

23. If you are charging the purchase to a grant account, click **Project** and complete the following fields:

Field Name	R/O/C	Description
Project	R	The segment that identifies the activity. Example: 10005203
Task	R	The segment that identifies a subset of the activity. Example: 1
Award	R	The segment that identifies the funding source. Example: 1002068R
Expenditure Type	R	The segment that identifies the expenditure classification Example: Ge Exp Res & Educ Sup
Organization		The segment that identifies the unit on campus that has been awarded the funding Example: Microbiology Accts
Date		The current date Example: 10-NOV-2005

24. Click .

Category 1 :

Category 2 :

Project Screen Completed

Num	Project	Task	Award	Type	Org	Dc
1	10005203	1	1002068R	Ge Exp Res & Ed	Microbiology Ac	11

Account Description

Charge	WVU Health Scie.Microbiology Ac.RC	Budget	WVU Health Scie.Microbiology Ac.RC
Accrual	WVU Health Scie.Microbiology Ac.RC	Variance	WVU Health Scie.Microbiology Ac.RC

25. Go to step 29.



26. If you are charging the purchase to a General Ledger Account, tab to the Charge Account field. The Charge Account field should open.

Category 1 :

Category 2 :

Charge Account field

27. Complete the following fields:

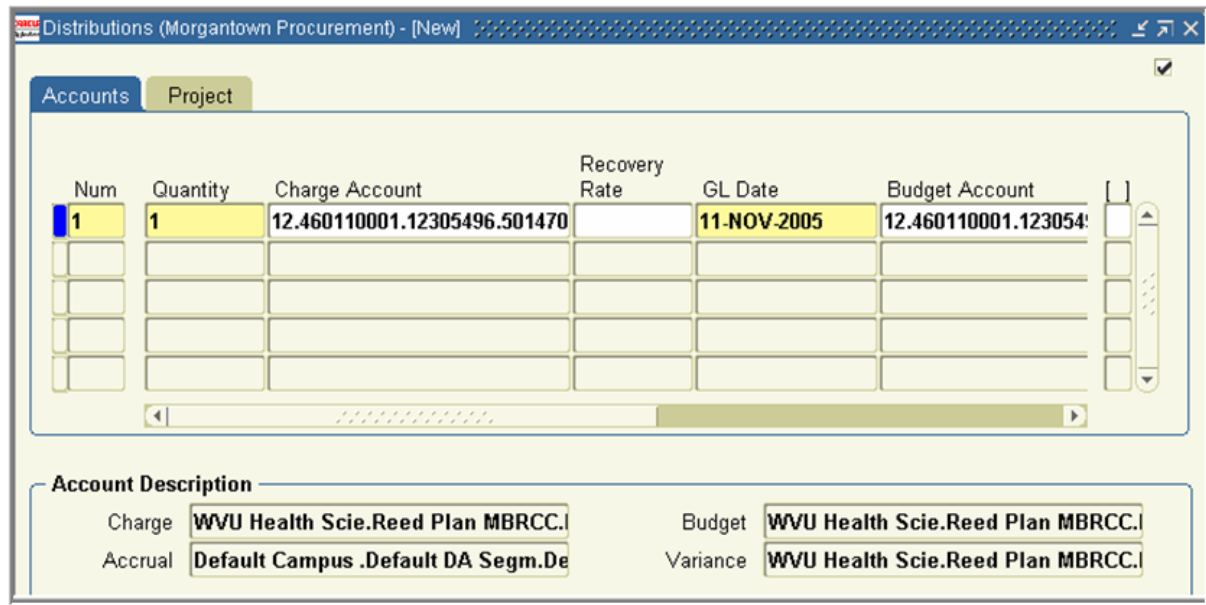
Field Name	R/O/C	Description
Campus	R	Identifies which WVU campus is purchasing the item. Example: 12
Departmental Activity	R	Identifies campus unit with expenditure control. Example: 460110001
Fund	R	Identifies ownership of assets, liabilities, and fund balances as opposed to expenditure authority. Example: 12305496
Line Item	R	Classifies activity for accounting and budgeting purposes. Example: 5014701  Always use this line item when purchasing radioactive materials for research.
Function	R	Classifies purpose of purchase for reporting purposes. Example: 151
Project	R	Identifies whether a sponsored agreement is funding this purchase. Example: 99999999.  When a sponsored agreement is not paying for the purchase, then enter the default Project, 99999999, in this field.

Category 1 :

Category 2 :

28. Click  .

General Ledger Account Completed



Num	Quantity	Charge Account	Recovery Rate	GL Date	Budget Account
1	1	12.460110001.12305496.501470		11-NOV-2005	12.460110001.123054

Account Description

Charge	WVU Health Scie.Reed Plan MBRCC.	Budget	WVU Health Scie.Reed Plan MBRCC.
Accrual	Default Campus .Default DA Segm.De	Variance	WVU Health Scie.Reed Plan MBRCC.

29. Click  to exit the Distributions screen and return to the main Requisition screen.

Category 1 :

Category 2 :

Requisitions

Requisitions (Morgantown Procurement) - [New]

Number: 10039936 Type: Purchase Req Preparer: Allen, Char L
Description: radiation for J. Ba Status: Incomplete Total: USD 75.00
[20]

Items Source Details Details Currency

Num	Rev	Category	Description	UOM	Quantity	Price	Need-By	[]
1		RADIOACTIVE M	Vendor Catalog Num	Each	1	75		20

Destination Type: Expense Source: Supplier
Requestor: Allen, Char L Supplier: PERKINELMER LAS INC
Organization: Morgantown Procurement Site: 0000068928
Location: HS HSC NORTH 2052 Contact: ...
Subinventory: Phone:

Catalog... Distributions Approve...

30. If you need a second line for shipping, click in row two of the main requisition screen and select **Edit** → **Duplicate** → **Record Above**. The second line of the requisition will be copied from the first line. You can then change the fields that are different.

Category 1 :

Category 2 :

Requisitions

Requisitions (Morgantown Procurement) - [New]

Number: 10039936 Type: Purchase Reqt Preparer: Allen, Char L
 Description: radiation for J. Ba Status: Incomplete Total: USD 150.00
 [20]

Items Source Details Details Currency

Num	Rev	Category	Description	UOM	Quantity	Price	Need-By	[]
1		RADIOACTIVE M	Vendor Catalog Numb	Each	1	75		20
2		RADIOACTIVE M	Vendor Catalog Numb	Each	1	75		20

Destination Type: Expense Source: Supplier
 Requestor: Allen, Char L Supplier: PERKINELMER LAS INC
 Organization: Morgantown Procurement Site: 0000068928
 Location: HS HSC NORTH 2052 Contact:
 Subinventory: Phone:

Catalog... Distributions Approve...

31. Complete the following fields:

Field Name	R/O/C	Description
Category	R	Description of the Category. Example: Freight Transportation
Description	R	The full description Example: Shipping and Handling
Each	R	Unit of Measure Example: Each
Quantity	R	Number to be purchased Example: 1
Price	R	Price per item Example: 15

Category 1 :

Category 2 :

Requisitions

Requisitions (Morgantown Procurement) - [New]

Number: 10039936 Type: Purchase Req Preparer: Allen, Char L
Description: radiation for J. Ba Status: Incomplete Total: USD 90.00


[20]


Num	Rev	Category	Description	UOM	Quantity	Price	Need-By	[]
1		RADIOACTIVE M	Vendor Catalog Num	Each	1	75		20
2		FREIGHT TRANS	Shipping and Handlin	Each	1	15		20

Destination Type: Expense Source: Supplier
Requestor: Allen, Char L Supplier: PERKINELMER LAS INC
Organization: Morgantown Procurement Site: 0000068928
Location: HS HSC NORTH 2052 Contact: ...
Subinventory: Phone:

Buttons: Catalog... Distributions Approve...

32. Click  .

33. Click  to enter the account numbers that are paying for the purchase. Be sure to use the line item or expenditure type for research (Ge Exp Res & Ed Sup & Ser) (5014701) instead of using a line item corresponding to shipping.

34. Click  and return to the main Requisitions screen.

Category 1 :

Category 2 :

Requisitions

Requisitions (Morgantown Procurement) - [New]

Number: 10039936 Type: Purchase Req Preparer: Allen, Char L
Description: radiation for J. Ba Status: Incomplete Total: USD 90.00

[20]

Items Source Details Details Currency

Num	Rev	Category	Description	UOM	Quantity	Price	Need-By	[]
1		RADIOACTIVE M	Vendor Catalog Numb	Each	1	75		20
2		FREIGHT TRANS	Shipping and Handlin	Each	1	15		20

Destination Type: Expense Source: Supplier
Requestor: Allen, Char L Supplier: PERKINELMER LAS INC
Organization: Morgantown Procurement Site: 0000068928
Location: HS HSC NORTH 2052 Contact:
Subinventory: Phone:
Catalog... Distributions Approve...

35. Click  .

Approve Document (Morgantown Procurement) - 10039936

Approve Document (Morgantown Procurement) - 10039936

Reserve

Unreserve Unreserve Date

Submit for Approval

Forward Forward From

Approval Path

Forward To

Note

Print

OK Cancel

36. Click Reserve .

37. Click Forward .

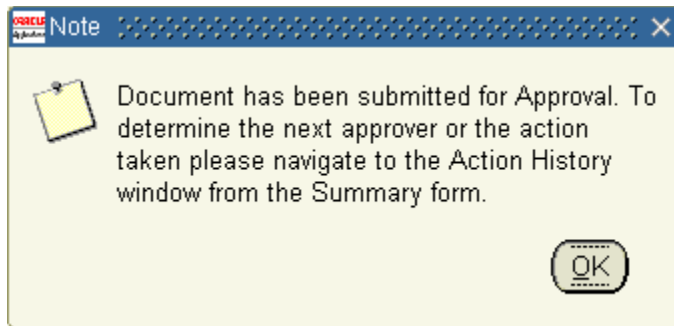
38. Click .

Note



39. Click  .

Note



40. Click  .

41. You have completed this task.

Result

You have created a requisition for radioactive materials.

Comments