ARC Radioactive Materials (RAM) Procurement Instructions:

(Note: You must have Procurement privilege within the ARC system to be able to process a requisition within that site. View the Finance page http://finance.columbia.edu/ to learn how to gain access from the Finance team.)

Login to ARC: Access the ARC Portal by visiting MyColumbia: https://my.columbia.edu/
Login with your UNI and Password. Choose the ARC Portal tab as pictured below.

The following page is an informational page that lets you know of any updates with the ARC system. Click the Go to ARC button at the lower left to enter the ARC system.

Clicking the above link opens up your ARC center in a separate window.

Note: Both ARC windows will time out after 15 minutes of inactivity.

Created by Jillian D. Sacheli (jp2696) September 2012
**Access eProcurement:** Your ARC center will show a blue box on the left side of the screen that is your main menu for the functions you are permitted to access within ARC.

To begin submitting a requisition, click on the **eProcurement** link within the blue box. On the following page, click **Create Requisition.** You are now brought to the below page.

**1. Define Requisition:**

**Top section** (highlighted above): Provide a title for your requisition in the **Requisition Name** field. Reset the **Priority** field as needed and declare whether this is a **Sole/Single Source** purchase (follow Purchasing’s guidelines on [http://finance.columbia.edu/](http://finance.columbia.edu/) for that information.)

**Line Defaults section** (from above): Choose the **Vendor** by using the eyeglass icon next to that field to search vendors. Once you choose a vendor, the field to the right titled **Vendor Location** will automatically populate based on the vendor you chose but double-check the address using the eyeglass feature to the right of that field (some vendors have more than one address so you should always double-check). You can choose the **Buyer** using the eyeglass feature beside that field, however, the ARC system will route to the proper buyer regardless of whether you choose one. The most important field to focus on is the **Category** field as it will route the **Shipping** of your RAM requisition.
Choose **Category Lookup** by clicking the eyeglass icon to the right of the **Category** field. Search Category by setting the search criteria to **Description** (default is ‘category’ so use the pull-down menu to instead choose ‘description’) then type in **RAD** and click **Find**. Click on the desired category code to choose it.

Notice campus designations are included in the Category numbers as MC (Medical Center) and MS (Morningside) as well as within the description titles. Be sure to choose the correct campus designation. In the case of ordering Radio nucleotides, the isotopes are shipped directly to the Radiation Safety Office. So in choosing the MC or MS designation you will lock in the shipping address as the MC or MS Radiation Safety Office locations, respectively. Please see additional notes below on shipping to the Radiation Safety Offices.

**Shipping Defaults Section:**

Example 1: *Choosing a Radio nucleotide to be shipped to the MS Campus.* You will need to enter additional information by clicking the **Modify Onetime Address** to the right of the **Ship To** Field which has now auto-populated with the text **RADSAFE-MS**

Clicking the **Modify Onetime Address** brings you to the below screen where you should input the Radiation Safety Office **Telephone** number at Morningside 212-854-8749 (input without hyphens as shown below) then click **OK**.

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Example 2: *Choosing a Radio nucleotide to be shipped to the MC Campus.* You will need to enter additional information by clicking the **Modify Onetime Address** to the right of the **Ship To** Field which has now auto-populated with the text **RADSAFE-MC**

Clicking the **Modify Onetime Address** brings you to the below screen where you should input the Radiation Safety Office **Telephone** number at Medical Center 212-305-0303 (input without hyphens as shown below) then click **OK**.

Next you will enter the **Bill To Location ID** field by clicking the eyeglass icon to the right of that field as pictured below.

The **Look Up Bill To Location ID** search screen will pop up permitting you to search for your billing address. In the example below, I input the numbers the billing location begins with as 1150 and clicked **Look Up**. Two choices appeared. I clicked on 1150 Saint Nicholas Avenue in this example.
After choosing the **Bill To Location ID**, you are returned to the **Define Requisition** screen where you should complete the Billing address entry by clicking the Modify Bill To Address as pictured below.

Clicking **Modify Bill To Address** allows you to add more detail for your shipping address like the **Building** title, **Floor** and **Room** and your **Telephone** number in case the vendor needs to contact you. Click **OK** when done.

You are again returned to your **Define Requisition** page which now appears as shown below. You can enter the chartstring information under the **Accounting Defaults** if you are using the same account for all line items. If you are using different accounts for different line items, you will have an opportunity to input Speedchart information later. For the purposes of this example, I will skip this part and click the **Continue** button at the bottom of the screen.
2. **Add Items and Services:**

You have now entered the 2nd Step of submitting your RAM requisition where you will now enter information for the items to be purchased. Please visit [http://finance.columbia.edu/](http://finance.columbia.edu/) for Purchasing’s full guidelines for making purchases. In this example, I will choose **Special Item**.

In the below window that appears, input all necessary fields marked with an asterisk (*). My below example shows basic information inputted into the required fields. When done, click **Add Item**.
The next screen that appears signifies the 2nd line item you are adding and repeats the steps you did previously. Notice the right-side **Requisition Summary** screen has begun tallying items and pricing you’ve entered. As before, click **Add Item** to add this 2nd item.

When you are done adding line items, click the **Review and Submit** tab at the top.
3. **Review and Submit:**

Your Review and Submit screen defaults to the below appearance.

To see more information and add/edit the accounting information, click each of the triangles next to line items 1 & 2 as highlighted above. Your view and detail for each line item are now expanded. Line item 1 information is shown below. Click the **Chartfield 2** tab to view what you’ve already entered. You can also begin populating chartfield information at this point using the **Speedchart** function. *(Note: the Account number chosen in the first field must be one already budgeted by your Finance Manager. If the chosen account number has not been budgeted you will receive a budgeting error.)* You can again collapse the view of this line item by again clicking the triangle in front of the line.

```
<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>RAM Isotope 1</td>
<td>PERKIN ELMER INSTRUMENTS INC</td>
<td>1.0000</td>
<td>Each</td>
<td>10.0000</td>
<td>10.0000</td>
</tr>
</tbody>
</table>
```

You again have an opportunity to modify address and provide additional shipping comments.
Once you’ve input/double-checked information for all line items, click the check box for each line and run the Check Budget.

After the Check Budget has been done you can Save & Submit.

Once you click Save & Submit, you are routed to a Confirmation page. The top portion shows your requisition info.
Scroll down on the Confirmation page using the vertical scroll bar to see the Approvals section. Your requisition is first routed for Departmental Approvals for your Department. Once they provide approval, the requisition is then routed to Radiation Safety for RAM Prior Approvals. (Radiation Safety RAM Prior Approvers CANNOT see this requisition until your department has provided Departmental Approval first.) You can click on the underlined words ‘Multiple Approvers’ within any of the approver windows to see the list of approvers who can approve your requisition.

At the very bottom of the Confirmation/Approvals screen you can click the underlined words to View printable version, Manage Requisitions, Create New Requisition or you can also click the above button to Edit Requisition. Note any time you edit a requisition you re-route it back through the approval process. Therefore if your department provided approval but then you make a change after that approval, it goes back to your department again for approval.

After submitting your requisition, upload any relevant documents to the EDM website at https://procurement.columbia.edu/documents/summary. Click the Purchasing tab, Log in and enter the Requisition ID number you received previously on your requisition confirmation page. Browse and upload any relevant documents if needed.