INVENTORY LINK / TAB

The Inventory Management Link or Inventory Tab provides the University of MN laboratory personnel with a set of features to allow you to properly manage the procurement and use of Radioactive Materials in compliance with your permit. Your usable radioisotope inventory is impacted by procurement, transfers, or usage (i.e. performing protocol activities as outlined by your permit). As part of the responsibilities associated with the permit, you are required to maintain a record of your inventory. This portion of IsoTrack is designed to electronically maintain this inventory record based on your lab activities. The use of these features provides a complete history of each radioactive material item within your lab. Your inventory records are available by isotope and vial at any point in time. To view them simply select the Isotope then select the vial, and the history will be displayed. (NOTE: The system is automatically calculating decay based on the isotope). Once in full use in your lab this feature should significantly reduce your paper records needs, and make the recording of radioactive material a consistent activity throughout all university lab areas.

The functionality provided from this page of IsoTrack is divided into 4 areas of the page including the following::

- Maintain Radioisotope Inventory: Provides the options available to manage the use of Radioisotopes through protocol usage and automatically maintains proper inventory records. Additionally, containers may be identified to manage working stock created during the operation of a protocol.
- Radioactive Material Ordering: Provides the ability to order isotopes associated with your permit, to review the status of your orders and to obtain departmental approvals of your orders if required by your department.
- Transfer In: Allows you to request the transfer of material from another University or University of MN location, approve requests to transfer material into your location and confirm receipt of material received at your location.
- Transfer Out: Allows you to request the transfer of material to another University or University of MN location, initiate transfers of material from your lab to the receiving location, review transfers requested from your lab location and to view the status of requests that you have made to move your inventory to another location.

The specific menu item selections and purposes are outlined within the remainder of this Quick Reference Help Text.

TABLE OF CONTENTS (MENU SELECTIONS)

Maintain Radioisotope Inventory

Inventory Quick Update by percentage

Inventory Quick Update by percentage - Multiple Pages

View / Update My Inventory by volume

Create Secondary Container (working stock)

Radioactive Material Ordering

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View / Change my past Orders

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Transfer In

Initiate Transfer Request From Other internal user

Initiate Transfer Request From external user

Confirm Received Transfer Requests

Accept incoming transfer requests

Transfer Out

Initiate Transfer Request To Other internal user

Initiate Transfer Request To external user

Review Isotope Transfer Requested from my Permits

View status of my request

Click on any of the table of content areas to obtain more detail relating to the general purpose and capabilities of these features.

MAINTAIN RADIOISOTOPE INVENTORY

Return to Table of Contents

The options grouped within this area of the inventory tab provide the ability to record inventory usage through the protocol activities, and to create secondary container (working stock) for material which will be used in subsequent protocols.

INVENTORY QUICK UPDATE BY PERCENTAGE

Return to Table of Contents

This selection allows you to select a protocol and record its operation, resulting in the adjustment of your inventory based on the protocol. You will be requested to provide the following information:

- Which isotope will be used (Selected by isotope and vial)
- Protocol and lab personnel completing the protocol
- Amount of material being used
- Waste distribution (This information is automatically entered based on the protocol definition submitted as part of your permit. The distribution can be adjusted if needed)
- Waste Containers (This information is also automatically completed based on your existing waste containers and protocol parameters).
 - If a waste container does not exist, it will be created automatically
 - If one or more appropriate waste containers exist, they will be available (visible) and may be selected as desired.

Once the information is completed, the protocol usage is recorded, and the results captured including:

- The amount of material used is subtracted from the original vial content amount. The vial content is now accurate based on the completed protocol,
- The appropriate adjustments are made to each of the waste containers, based on the amount of material used and the protocol waste distribution percentages. All waste container radioactive material content is now accurate based on the completed protocol.
- The historical record of material usage for the selected vial is recorded. The vial history now indicates the date the material was used, (protocol usage), who performed the activity; the original vial contents, the amount used, and the resulting vial content. (**NOTE**: This vial history is available when any specific material vial is selected).

INVENTORY QUICK UPDATE BY PERCENTAGE - MULTIPLE PAGES

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This selection provides the same functions as outlined above in the Inventory Quick Update by percentage. The only difference is that this method uses multiple pages (identified as a step) to present the feature, reducing the amount of information shown on the page. The pages are divided as described below:

- Which isotope will be used (Selected by isotope and vial)
- Step 1 Protocol and lab personnel completing the protocol
- Step 2 Amount of material being used
- Step 2 Waste distribution (This information is automatically entered based on the protocol definition submitted as part of your permit. The distribution can be adjusted if needed)

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- Step 3 Waste Containers (This information is also automatically completed based on your existing waste containers and protocol parameters).
 - If a waste container does not exist, it will be created automatically
 - If one or more appropriate waste containers exist, they will be available (visible) and may be selected as desired.

Once the information is completed, the protocol usage is recorded, and the results captured including:

- The amount of material used is subtracted from the original vial content amount. The vial content is now accurate based on the completed protocol,
- The appropriate adjustments are made to each of the waste containers, based on the amount of material used and the protocol waste distribution percentages. All waste container radioactive material content is now accurate based on the completed protocol.
- The historical record of material usage for the selected vial is recorded. The vial history now indicates the date the material was used, (protocol usage), who performed the activity; the original vial contents, the amount used, and the resulting vial content. (NOTE: This vial history is available when any specific material vial is selected).

VIEW / UPDATE MY INVENTORY BY VOLUME

Return to Table of Contents

This selection allows you to select a protocol and record its operation, resulting in the adjustment of your inventory based on the protocol. You will be requested to provide the following information:

- Which isotope will be used (Selected by isotope and vial)
- Protocol and lab personnel completing the protocol
- Amount of material being used
- Waste distribution (You will be asked to provide the distribution "volumes" for this protocol. NOTE: The volume distributed values must be equal to the volume removed from the original container or an error message will appear).
- Waste Containers (This information is also automatically completed based on your existing waste containers).
 - If a waste container does not exist, it will be created automatically
 - If one or more appropriate waste containers exist, they will be available (visible) and may be selected as desired.

Once the information is completed, the protocol usage is recorded, and the results captured including:

- The amount of material used is subtracted from the original vial content amount. The vial content is now accurate based on the completed protocol,
- The appropriate adjustments are made to each of the waste containers, based on the amount of material used and the protocol waste distribution percentages. All waste container radioactive material content is now accurate based on the completed protocol.
- The historical record of material usage for the selected vial is recorded. The vial history now indicates the date the material was used, (protocol usage), who performed the activity; the original vial contents, the amount used, and the resulting vial content. (**NOTE**: This vial history is available when any specific material vial is selected).

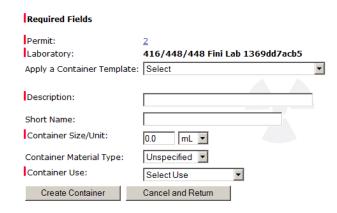
CREATE SECONDARY CONTAINER (WORKING STOCK)

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This selection allows you to create a secondary container which can be used to temporarily hold working stock.

Working Stock = Radioactive material which is created as a byproduct of a protocol and used as the primary material input for subsequent protocols).

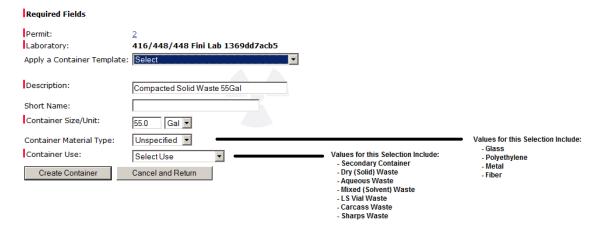
When selected, you will be requested to describe your secondary container using the form shown in the illustration below.



Within this form, your permit and lab location will be displayed. You will need to select your lab, if there is more than one associated to the permit. The remaining information may be obtained from the templates (2 are provided) or you may identify your own special descriptive information. The templates available include:

- Compacted Solid Waste 55Gal
 - Polyethylene Container (Use as Secondary)

The values associated to these templates are shown below Template = Compacted Solid Waste 55Gal



RADIOACTIVE MATERIAL ORDERING

Return to Table of Contents

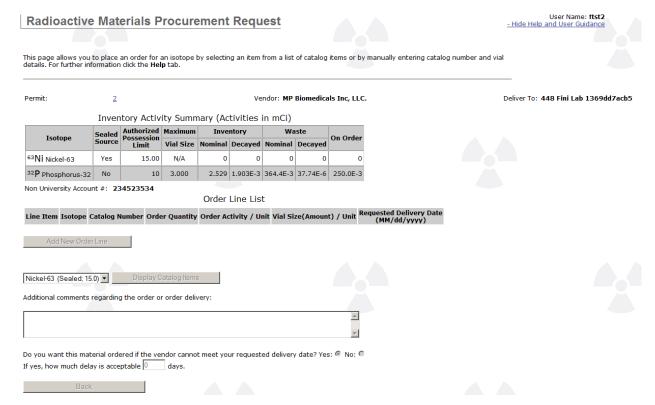
This section provides features to allow you to order new radioactive material for your labs, review and copy past orders for material and perform financial review as required by your own departmental work processes.

RADIOACTIVE MATERIALS PROCUREMENT REQUEST

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This selection provides the ability to electronically place a request to order radioactive material and track the order process. To complete a radioactive material order request, select the "Radioactive Materials Procurement Request" Link within the Radioactive Material Ordering section of the Inventory page. If you have multiple permits, you will need to select the permit number prior to completing the request. If you have only one permit it will be identified at the top of your request form. You will be presented with the Procurement Request page which identifies your permit number, the current isotopes associated with your permit "Inventory Activity Summary", then begins the order request. This is completed by:

- 1. Enter the EFS Account Code Information for you lab area, or a Non-University Account number is available for non-university of MN personnel who are ordering through the system.
- Select the Vendor from the available Pull down list or enter the vendor in the space provided.
- 3. Select the "Deliver To" address from the pull down list. The list will include labs associated to your permit. Once completed, the order page is presented as shown below.



4. Select the material name that you will be ordering using the pull down list provided. This list will contain all of the Isotopes that you have associated to your lab.



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- If you will use the vendor's catalogue based on the selected vendor, Click on the "Display Catalogue Items", and you will be provided a complete list of all items of this material available for ordering from the vendor catalogue.
 - a. Select the appropriate catalogue and add it to your order request, by clicking on the "Select Catalog Item: Button. It will appear in the Order Line List once requested, as shown below, You can Add New Order Lines, Edit Order Lines, or Remove Order Lines by selecting the order line and the applicable action Button.

	Order Line List					
Line Item	Isotope	Catalog Number	Order Quantity	Order Activity / Unit	Vial Size(Amount) / Unit	Requested Delivery Date (MM/dd/yyyy)
1	O Phosphorus-32	64013	1	10.0 mCi	0.0 mL	01/02/2013
	Add New Order Line	Edit Order Line	Ren	nove Order Line		

- 6. Once all items have been added to your request, complete it by adding any additional comments regarding your order in the text box provided.
- 7. Indicate if you wish to receive the order even if it cannot be delivered on your requested delivery date by selecting either **Yes** or **No**. (Note: The delivery date for catalogue items defaults to the current date, while the delivery date for manually entered line items will default to the current date + 2 days).
- 8. If you indicated Yes, enter the number of days delay which is acceptable.
- 9. Submit the request by clicking on the "Submit Procurement Request" Button. It will be immediately sent to RPD for ordering.
- 10. If your department requires financial review of all purchase requests, click on the "Submit to Accountant" Button instead of the "Submit Procurement Request" Button noted in step 9 above. This will allow you to forward the request to your account who will then submit it to the RPD. When selected, you will be presented with a Search function to locate and select your accountant. The search will include all individuals associated to the University of MN.
 - a. Enter the name or a portion of it or any of the other parameters shown
 - b. Click on the "Search" Button
 - c. Select the appropriate individual from the search results list
 - d. Click on the "Forward to this Person" Button
- 11. The material request form is forwarded via email to the individual selected and will be sent to the RPD for ordering once they have approved it.

VIEW / CHANGE MY PAST ORDERS

Return to Table of Contents

This selection provides you the ability to review, previous procurement requests based on their RPP numbers. These requests can also be modified and resubmitted as desired. To view past orders, select the "View / Change my past Orders" Link within the Radioactive Material Ordering section of the Inventory page. If you have multiple permits, you will need to select the permit number prior to completing the request. If you have only one permit it will be identified at the top of the initial search page information. You will be allowed to filter the orders based on isotope, order dates, vendors or status. Select the filter, then:

- 1. Click on the "**Search**" Button. A complete list of all previous orders matching the filter criteria is displayed.
- 2. Select the appropriate RPP Number
- 3. Click the available Buttons to complete the following actions as desired:
 - a. Re-Submit Order Line allows you to copy and submit the line item as a new request, or to modify it and submit it as a new request.
 - b. Cancel Order Line Cancels any order line which has not yet been received.
 The status for the line will change to indicate "Cancelled"

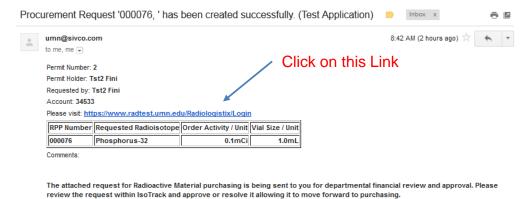
- c. Download Report Not available at this time
- d. Finished Returns to the Inventory page.

PROCUREMENT REQUEST FISCAL REVIEW

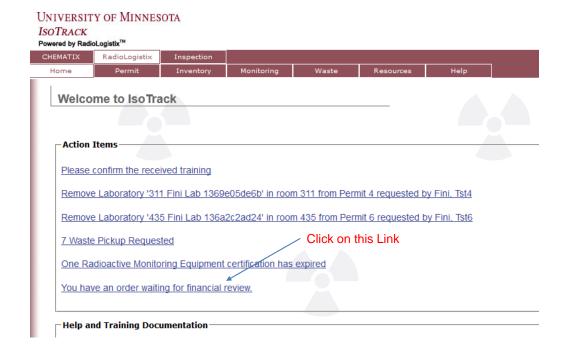
Return to Table of Contents

This selection provides you the ability to review and approve the procurement request. This feature is used by your accounting reviewer, whenever a procurement request is submitted to them for review. To review a procurement request from an Email Notification,

 Open the email message with the subject line "Procurement Request '000076,' has been created successfully.' it will appear as shown below. (NOTE: The numeric portion of the subject line reflects the order RPP Number and changes for all items ordered).



2. Click on the link provided as shown above. The IsoTrack application will open at the Home Page as shown below.



- An action item link to the review record is displayed within the Action Items section. Click on the link to display the records waiting for review.
- 4. Select the appropriate record from the list of records available for review and Click on the "Select Order to Review" Button. Complete it using the Buttons provided as appropriate:
 - a. **Approve Order** Submits the request to RPD for ordering the material
 - b. Reject Order Stops the order from being submitted (NOTE: You as the financial reviewer should discuss and resolve this with the requesting individual).
 - c. Cancel & Return Leaves the request pending financial review and approval

If you select the "Procurement Request Fiscal Review" link from the Radioactive Material Ordering portion of the Inventory Tab, the list of all items waiting for your review will be presented. These can be addressed as described in step 4 above. If there are no items waiting for your review an error message is displayed as shown below.



STOP Activity Status: Action can not be completed

You do not have any Procurement Request Orders to Review

TRANSFER IN

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This section provides features to allow you to transfer radioactive material from another lab space internal to the University of MN or from an external (not affiliated to the U of M) lab area. You may only request the transfer of material which is authorized for your permit. Additionally, you may only request transfers of material which will not result in possession of material exceeding the possession limits set for your permit. All transfer requests are reviewed and approved by the RPD, and additionally must be accepted by the group from which you are requesting the transfer.

INITIATE TRANSFER REQUEST FROM OTHER INTERNAL USER

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This selection provides the ability to electronically initiate a request for the transfer of radioactive material from another University of MN lab space to your lab. To complete this request, the following rules must be met:

- 1. You can only request material which is authorized for your permit
- 2. You can only request amounts of material which will not exceed your authorized possession limits once received
- 3. You can have no active violations on your permit
- 4. The permit / lab from which you are requesting the transfer must have sufficient material to fulfill the request
- 5. The RPD must approve the request (based on material, possession limits, open permit violations / holds etc.).
- 6. The permit from which you are requesting the material must approve the transfer

To initiate a transfer request from another internal user (U of M Permit / Lab location), click on the "Initiate Transfer Request From Other Internal User" link within the "Transfer In" section of the Inventory Tab, and complete the following steps:

1. Using the Search for user function, locate the user from which you will be requesting the material.

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- 3. From the list titled "My Permit Isotope List (Activities in mCi), select the Isotope that you are requesting to be transferred to your lab. (Set the Associated Radio Button)
- 4. Enter the Activity Amount requested (in mCi)
- 5. Select the delivery location if needed. If you only have one lab associated to your permit, this entry will default to that lab, no entry is required.
- 6. Enter an account number if desired. (NOTE: This is a text field and will require you to enter proper formatting if it is used).
- 7. Enter any additional information comments desired. These will be visible to anyone viewing the request, i.e. RPD or the individual / permit you are requesting material from.
- 8. Click on the "Send Request" to submit the request.

INITIATE TRANSFER REQUEST FROM OTHER EXTERNAL USER

Return to Table of Contents

This selection provides the ability to electronically initiate a request for the transfer of radioactive material from a non-University of MN lab space to your lab. To complete this request, the following rules must be met:

- 1. You can only request material which is authorized for your permit
- 2. You can only request amounts of material which will not exceed your authorized possession limits once received
- 3. You can have no active violations on your permit
- 4. The RPD must approve the request (based on material, possession limits, open permit violations / holds etc.).
- 5. The permit from which you are requesting the material must be willing to send the material to the RPD.

To initiate a transfer request from non-University of MN location, click on the "Initiate Transfer Request From Other External User" link within the "Transfer In" section of the Inventory Tab, and complete the following steps:

- 1. Enter the Institution Name
- 2. Enter the Researchers Name
- Enter the Researchers Contact information including:
 - a. Phone Number
 - b. Email Address
 - c. Address
- 4. From the list titled "My Permit Isotope List (Activities in mCi), select the Isotope that you are requesting to be transferred to your lab. (Set the Associated Radio Button)
- 5. Enter the Activity Amount requested (in mCi)
- 6. Select the delivery location if needed. If you only have one lab associated to your permit, this entry will default to that lab, no entry is required.
- 7. Enter an account number if desired. (NOTE: This is a text field and will require you to enter proper formatting if it is used).
- 8. Enter any additional information comments desired. These will be visible to anyone viewing the request, i.e. RPD or the individual / permit you are requesting material from.
- 9. Click on the "Send Request" to submit the request.

CONFIRM RECEIVED TRANSFER REQUESTS

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This selection provides the ability to confirm that you have received the material which you requested to be transferred to your permit / lab. Once confirmed, the new material will be added

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to your isotope material inventory. To Confirm a Received Transfer Request, click on the "Confirm Received Transfer Requests" link within the "Transfer In" section of the Inventory Tab, and complete the following steps:

- 1. Select the line item which has been received.
- 2. Click on the "Confirm Transportation" Button. The inventory is noted as received and is added to your isotope inventory.

ACCEPT INCOMING TRANSFER REQUESTS

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This selection provides the ability to accept or accept and confirm incoming material to your permit / lab. This option is used when the material being accepted is delivered to your lab by the RPD. This acceptance is only required for material which you is being transferred into your lab from another facility, and which is being delivered by RPD. The following rules apply to the acceptance of material to your permit.

- 1. You can only receive material which is authorized for your permit
- 2. You cannot receive material which will put you in excess of your authorized possession limits for the isotope
- 3. You can only accept material which has been approved for delivery to your lab

To accept an incoming isotope transfer, click on the "Accept Incoming Transfer Requests" link within the "Transfer In" section of the Inventory Tab, and complete the following steps:

- 1. Select the line item to be accepted or rejected
- 2. Click on the "Accept Incoming Request" Button
- 3. Select the Delivery Location from the pull down list of available labs
- 4. Click on the "Accept Incoming Request" Button a second time to complete the transfer to the selected lab.
 - a. If you click on the "**Accept Incoming Request**", you will receive a message indicating that you should "Confirm the Receipt" of the isotope once it is delivered.
 - b. If you click on the "Accept and Confirm" Button, it will confirm that you have accepted the isotope and it has been delivered. It is now added to your inventory.
 - c. If you click on the "**Reject Incoming Request**", the request is denied and no further action is needed. Your inventory remains unaffected.



TRANSFER OUT

Return to Table of Contents

This section provides features to allow you to transfer radioactive material <u>from</u> your permit / lab location to another lab space internal to the University of MN or to an external (not affiliated to the U of M) lab area. You may only request the transfer of material which is authorized for your permit. the possession limits set for your permit. All transfer requests are reviewed and approved by the RPD, and additionally must be accepted by the group from which you are requesting the transfer. Additionally, you may only request transfers of material which will not result in possession of material exceeding

INITIATE TRANSFER REQUEST TO OTHER INTERNAL USER

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This selection provides the ability to electronically initiate a request for the transfer of radioactive material to another University of MN lab space from your lab. To complete this request, the following rules must be met:

- 1. You can only move material which is authorized for your permit
- 2. You can only select existing vials (inventory items) for transfer
- 3. The RPD must approve the request (based on material, possession limits, open permit violations / holds etc.).
- 4. The permit to which you are transferring the material must approve the transfer

To initiate a transfer request to another internal user (U of M Permit / Lab location), click on the "Initiate Transfer Request To Other Internal User" link within the "Transfer Out" section of the Inventory Tab, and complete the following steps:

- 1. Using the Search for user function, locate the user to which you will be transferring the material.
- 2. From the list of users, select the appropriate user then click on the "Select" Button
- 3. From the list titled "My Permit Isotope List (Activities in mCi), select the Isotope that you are requesting to be transferred. (Set the Associated Radio Button)
- 4. Click on the "**Show Detail Inventory**" Button. A complete list of all current Vial Level Details will be presented.
- 5. Select the RPP Number (line item) that you will be transferring.
- 6. Enter an account number if desired. (**NOTE:** This is a text field and will require you to enter proper formatting if it is used).
- 7. Enter any additional information comments desired. These will be visible to anyone viewing the request, i.e. RPD or the individual / permit you are requesting material from.
- 8. Click on the "Send Request" to submit the request.

INITIATE TRANSFER REQUEST TO EXTERNAL USER

Return to Table of Contents

This selection provides the ability to electronically initiate a request for the transfer of radioactive material to a non-University of MN lab space from your Permit / lab. To complete this request, the following rules must be met:

- 1. You can only move material which is authorized for your permit
- 2. You can only select existing vials (inventory items) for transfer
- 3. The RPD must approve the request (based on material, possession limits, open permit violations / holds etc.).
- 4. The permit to which you are transferring the material must approve the transfer

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- 1. Enter the Institution Name
- Enter the Researchers Name
- 3. Enter the Researchers Contact information including:
 - a. Phone Number
 - b. Email Address
 - c. Address
- 4. From the list titled "My Permit Isotope List (Activities in mCi), select the Isotope that you are requesting to be transferred from your lab. (Set the Associated Radio Button)
- 5. Click on the "Show Detail Inventory" Button. A complete list of all "Vial Level Details" currently noted as inventory in your lab for the selected isotope will be presented.
- 6. Select the RPP Number (Line Item) that you will be transferring.
- 7. Enter an account number. Please note this is required for external transfers. (NOTE: This is a text field and will require you to enter proper formatting if it is used).
- 8. Enter any additional information comments desired. These will be visible to anyone viewing the request, i.e. RPD or the individual / permit you are requesting material from.
- 9. Click on the "Send Request" to submit the request.

REVIEW ISOTOPE TRANSFER REQUESTED FROM MY PERMITS

Return to Table of Contents

This selection provides the ability to review, approve or deny any requests for the transfer of radioactive material from your permit. To review transfer requests from your permit, click on the "Review Isotope Transfer Requested from my Permits" link within the "Transfer Out" section of the Inventory Tab. A list of all isotopes requested for transfer from your permit will be presented.

- 1. Select the line item (isotope requested) to be reviewed
- 2. Click on the "Select Request" Button. Information is displayed to identify the request including: the date of request, who submitted the request, the isotope and amount requested. This will be followed by a complete list of all of your current inventory for the requested isotope by RPP (Vial) identification number.
- Select the RPP Number(s) which you will provide to the requestor, if you intend to approve the transfer
- 4. Add any additional comment information you wish to be included, within the text area provided
- 5. Click on the "Grant Request" Button to approve the transfer
- 6. Click on the "Reject Request" Button to reject the transfer.

NOTE: There is no impact on your inventory until the receiving location verifies that the transferred material has been received.

VIEW STATUS OF MY REQUEST

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This selection provides the ability to review the status of all inventory transfers associated to your lab. To view the status of your isotope transfers click on the "View Status of my Request" link within the "Transfer Out" section of the Inventory Tab. The status for all transfer requests is displayed as shown below:



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List of Isotope Transfer Requests

User Name: ftst2 - Hide Help and User Guidance

This page allows you to check on the status of a requested transfer, or cancel the transfer request if desired. For further information click the Help tab.



The information displayed includes:

- 1. Status Indicates the status of the specific request and may be
 - a. Requested Request has been submitted
 - b. Authorized Request has been authorized by RPD
 - c. Granted Request has been granted by the permit / location to whom the request was submitted
 - d. Completed Request has been completed
 - e. Revoked Request has been removed (revoked)
- 2. Date Requested
- 3. Date Authorized
- 4. Date Granted
- 5. Date Completed
- 6. Container identification
- 7. Isotope transferred
- 8. Amount transferred
- 9. Requested by Who requested the transfer
- 10. In/Out Indicates the direction of the transfer
 - a. ← = Transferred into the Initiated By Permit Holder's permit
 - b. → = Transferred out from the initiated By Permit Holder's permit
- 11. Provided By Who fulfilled the transfer request