

Purchase Request Operating Guide

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Introduction

The computerized RDA process (Purchase Request) is applicable to purchases of "specific" materials and purchases of "recurring" materials from the Research Area of Humanitas University and Humanitas Research Hospital

Specific materials are defined as "characteristic" products requested by researchers and necessary for carrying out laboratory activities. Antibodies, specific kits, etc. fall into this category, by way of non-exhaustive example.

"Recurring materials" means all the "generic" consumer goods necessary for carrying out the usual research activities at the Laboratory. In this case, the Lab Manager periodically provides for the insertion of purchase requests into the system, also indicating the reference job.

With reference to "specific" purchases, the Purchasing Department periodically assesses suppliers, with reference to which the relative price lists are annually reviewed and filed in the network by the Purchasing Department, which can be consulted by all the researchers.

RDA process

The process starts with the insertion into the system of the purchase request by the researcher, completed in all its parts and referred to the specific contract. It is specified that each line of the RDA must contain the motivation to purchase, which may be of an economic or technical nature (eg uniqueness in the product market). Each causal selected by a special drop-down menu must be discussed in the "notes" field, providing to attach, by line, any supporting documentation available.

Operatively, in the case in which a "technical motivation" is selected, the motivation of the choice must be described in detail, while, in the case in which an "economic motivation" is selected, the extremes must be indicated (eg folders / network paths) of the selected alternative offers, in order to guarantee an adequate level of traceability. All offers can be found on the intranet, under the research purchases App. (app acquisti ricerca)

Access to the system

To access the system, go to the following link <https://hunimed.zucchetti.com/infinity/> , enter the credentials (username and password) received and select your company (Humanitas University / Humanitas Mirasole).

Credenziali di accesso


2015 Infinity Project Zucchetti - Tutti i diritti riservati

vers. 2.4



The platform is accessible from the Internet and can be used with all browsers. We recommend using Google Chrome, Safari and Mozilla Firefox

After logging in, the user presents his workplace (My Desk), divided into three main areas

- **New processes:** where it is possible to create a new RDA
- **RDA to be modified:** where the RDAs that the user has created are displayed and can still be modified because not yet authorized; clicking on the symbol  you can view the detail of the RDA
- **Personal RDA:** where all the user-created RDAs and their status are displayed.

Sei in: [Workspace](#) > [My_desk](#) > Home

My desk CREA PAGINA AGGIUNGI PAGINA ? HELP

GESTIONE RDA DETTAGLIO RDA

▼ Nuovi processi

▲ RDA da Modificare

	RICH.NUM	DATA RICH	NOME UTENTE	COMPANY	GRANT ID	DES_FORN	SEDE CONSEGNA	URGENTE	STATO
Q	28	26-03-2018	utenterda	ISTHU	HEU004	BIO-OPTICA S.p.A.	003		Confermato
Q	27	22-03-2018	utenterda	ISTHU	HFR001	BIO-RAD LABORATORIES s.r.l.	003		Provvisorio
Q	26	21-03-2018	utenterda	ISTHU	HEU004	BIO-RAD LABORATORIES s.r.l.	003		Confermato

▲ RDA Personali

	RICH.NUM	DATA RICH	NOME UTENTE	COMPANY	GRANT ID	DES_FORN	SEDE CONSEGNA	URGENTE	STATO
Q	28	26-03-2018	utenterda	ISTHU	HEU004	BIO-OPTICA S.p.A.	003		Confermato
Q	27	22-03-2018	utenterda	ISTHU	HFR001	BIO-RAD LABORATORIES s.r.l.	003		Provvisorio
Q	26	21-03-2018	utenterda	ISTHU	HEU004	BIO-RAD LABORATORIES s.r.l.	003		Confermato
Q	20	28-02-2018	utenterda	ISTHU	HFR001	OBSOLETO VEDI 10734 -----DAKO ITALIA S.r	003		Approvato da PI
Q	15	15-01-2018	utenterda	ISTHU	HFR001	OLYMPUS ITALIA S.r.l.	003		Approvato da PI
Q	8	04-01-2018	utenterda	ISTHU	HFR001	EPPENDORF s.r.l.	003		Approvato da PI

Logo Azienda: HUMANITAS UNIVERSITY 28-03-2018

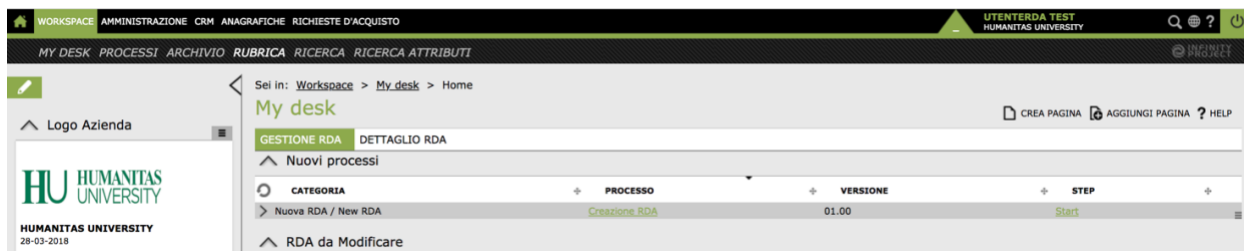
Cambio rapido azienda: COMPANY HUMANITAS MIRASOLE

Shortcuts: CAMBIO PASSWORD, RUBRICA

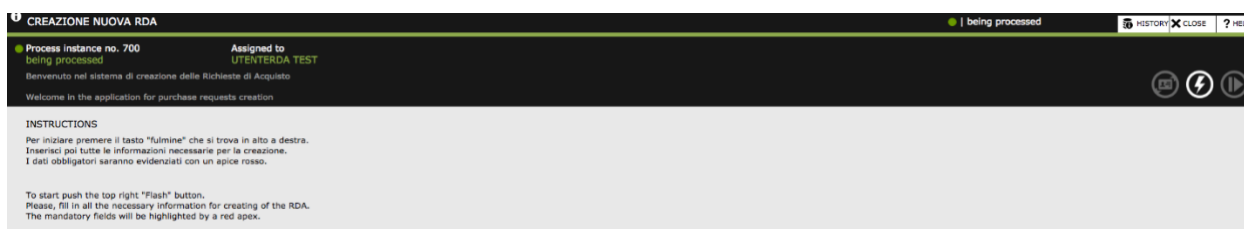
Calendario: Mercoledì 28 Marzo 2018

RDA creation

To create a purchase request, in the **New Jobs** area (**nuovi processi**), click on **Create RDA (Creazione RDA)**



and follow the directions



To start, press the "lightning" key located at the top right

The form relating to the purchase request will open, which must be completed by the researcher in each of its parts.

The form is divided into several sections:

- Grant ID Information (where to select the order code on which to make the request)
- Delivery data (where to specify the place of delivery of the material)
- Notes (possible field to insert Notes from the researcher)
- RDA detail (where to insert the items to be requested by line)

When the contract of interest is selected, the total available budget is shown (only for Humanitas University jobs)

RICHIESTE D'ACQUISTO

RICHIESTA ALLEGATI

Request Nr 26 del 21-03-2018 Stato richiesta Confermato


Richiesta urgente


GRANT ID INFORMATION

Azienda AHR ISTHU HUMANITAS UNIVERSITY

GRANT ID HEU004 NATOLI - ERC 2015 - MEDICI - GA692789 - HUNIMED Budget di commessa 1.853.006,39 EUR

Fornitore 10078 BIO-RAD LABORATORIES s.r.l.

If you know the supplier of the product (s) to be requested, you must enter it by clicking on the symbol  in the Supplier field

To enter the required items, go to the RDA Details area and click on the symbol  in the article field

DETTAGLIO RDA

Riga	Articolo	Descrizione	U.M.	Quantità	Prz. unitario	Cod. IVA	Netto di riga	Dt. prev. evas.	Voce di costo	Evasa
10				0,000	0		0			

Descr. suppl.

Voce di costo

Motivazione

Note riga

Totale righe 0

Totale imposta 0

Totale lordo 0

in this way it will open the registry of all the products present in the registry.

ELENCO ARTICOLI

CODICE	DESCRIZIONE	DESCRIZIONE SUPPLEMENTARE	ARTICOLO	CODICE VOCE DI COSTO	DESCRIZIONE VOCE DI COSTO	COD. FORNITORE	RAG. SOC. FORNITORE
125-2-45	PANNELLO SUGHERO NATURALE CORNICE IN ALL		30001480	5820307	CANCELLERIA	000002	TIPOGRAFIA FRATELLI VERDERIO S.N.C.
30001481_FOR	BLOCCO A4 A QUADRETTI 5MM.		30001481	5820307	CANCELLERIA	000002	TIPOGRAFIA FRATELLI VERDERIO S.N.C.
30001480	PANNELLO SUGHERO NATURALE CORNICE IN ALL		30001480	5820307	CANCELLERIA		
30001481	BLOCCO A4 A QUADRETTI 5MM.		30001481	5820307	CANCELLERIA		

The search within the product registry can take place for different keys:

- Item number

- Description
- Manufacturer code
- Supplier code

If the product you wish to request is not included in the registry, to insert a new product, choose a generic product from the product master list, as detailed in the table below.

Codice prodotto	Descrizione generica	Note
G5010001	Materiale di consumo	
G5800000	Materiale di consumo a lunga durata	
Serv. Ricerca	Servizi per la Ricerca	

Subsequently it is necessary to insert in the description of the article, in the DETAIL RDA box, the correct description of the product to be purchased

Warning! The generic code must only be used only when the requested product is not present in the article registry

It is specified that each line of the RDA must contain the motivation to purchase, which may be of an economic or technical nature (eg uniqueness in the product market). Each causal selected by a special drop-down menu must be discussed in the "notes" field, providing to attach, by line, any supporting documentation available.

Operatively, in the case in which a "technical motivation" is selected, the motivation of the choice must be described in detail, while, in the case in which an "economic motivation" is selected, the extremes must be indicated (eg folders / network paths) of the selected alternative offers, in order to guarantee an adequate level of traceability. All offers can be found on the intranet, under the research Purchasing App (acquisti ricerca)



To complete the process, simply click on the SAVE (salva) button in the upper right menu

The image is a screenshot of the 'RICHIESTE D'ACQUISTO' (Purchase Requests) form. The top navigation bar includes 'RICHIESTE D'ACQUISTO' and a menu with 'SALVA', 'CHIUDI', 'ALLEGATI', 'ATTRIBUTI', 'POST-IN', and 'HELP'. The main form area is titled 'RICHIESTA ALLEGATI'. It contains fields for 'Request Nr' (27), 'del' (22-03-2018), and 'Stato richiesta' (Confermato). There is a checkbox for 'Richiesta urgente'. The 'GRANT ID INFORMATION' section includes 'Azienda AHR' (ISTHU HUMANITAS UNIVERSITY), 'GRANT ID' (HFR001), 'SOLDA' - AFM TELETHON - UO INGM - HUNIMED', and 'Budget di commessa' (37.569,47 EUR). The 'Fornitore' field is '10078 BIO-RAD LABORATORIES s.r.l.'. The 'DATI CONSEGNA' section includes 'Sede di consegna' (003 Humanitas University), 'Indirizzo' (Via Rita Levi Montalcini), 'CAP / Località / Provincia' (20090 Pieve Emanuele MI), and 'Per conto di' (Prosperino).

If the amount of the RDA exceeds the planned budget, a pop-up will be displayed that warns about the budget checks that have not been exceeded (only for Humanitas University orders). In this case the RDA can not be completed because it has no economic coverage and is saved in Provisional status. Later it can be changed and completed.

RICHIESTE D'ACQUISTO

RICHIESTA ALLEGATI

Request Nr 27 del 22-03-2018 Stato richiesta Confermato

Richiesta urgente

GRANT ID INFORMATION

Azienda AHR ISTHU HUMANITAS UNIVERSITY

GRANT ID HFR001 SOLDA' - AFM TELETHON - UO INGM - HUNIMED

Fornitore 10078 BIO-RAD LABORATORIES s.r.l.

DATI CONSEGNA

Sede di consegna 003 Humanitas University

Indirizzo Via Rita Levi Montalcini

CAP / Località / Provincia 20090 Pieve Emanuele MI

Per conto di Prosperino

NOTE

Note richiesta

Da hunimed.zucchetti.com

Controlli di budget voce di costo '5B20537' non superati.

Importi per voce di budget 'SERVICE':
 importo previsto: 0,00.
 totale RDA: 12,20.
 totale già utilizzato: 0,00.
 eccedenza: 12,20.

Stato richiesta impostato automaticamente su 'Provvisorio'.

OK

The researcher can view all his RDAs in his My Desk in the Personal RDA area.

When the RDA is successfully saved it is made available to the PI for approval.

WORKSPACE AMMINISTRAZIONE CRM ANAGRAFICHE RICHIESTE D'ACQUISTO UTENTERDA TEST HUMANITAS UNIVERSITY

MY DESK PROCESSI ARCHIVIO RUBRICA RICERCA RICERCA ATTRIBUTI

Sei in: Workspace > My_desk > Home

My desk

GESTIONE RDA DETTAGLIO RDA

Nuovi processi

RDA da Modificare

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RDA Personali

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26	21-03-2018	utenterda	ISTHU	HEU004	BIO-RAD LABORATORIES s.r.l.	003		Confermato
20	28-02-2018	utenterda	ISTHU	HFR001	OBSOLETO VEDI 10734 ---- DAKO ITALIA S.r	003		Approvato da PI
15	15-01-2018	utenterda	ISTHU	HFR001	OLYMPUS ITALIA S.r.l.	003		Approvato da PI
8	04-01-2018	utenterda	ISTHU	HFR001	EPENDORF s.r.l.	003		Approvato da PI

Logo Azienda HUMANITAS UNIVERSITY 28-03-2018

Cambio rapido azienda COMPANY HUMANITAS MIRASOLE

Shortcuts CAMBIO PASSWORD RUBRICA

Calendario Mercoledì 28 Marzo 2018


Approval by the PI

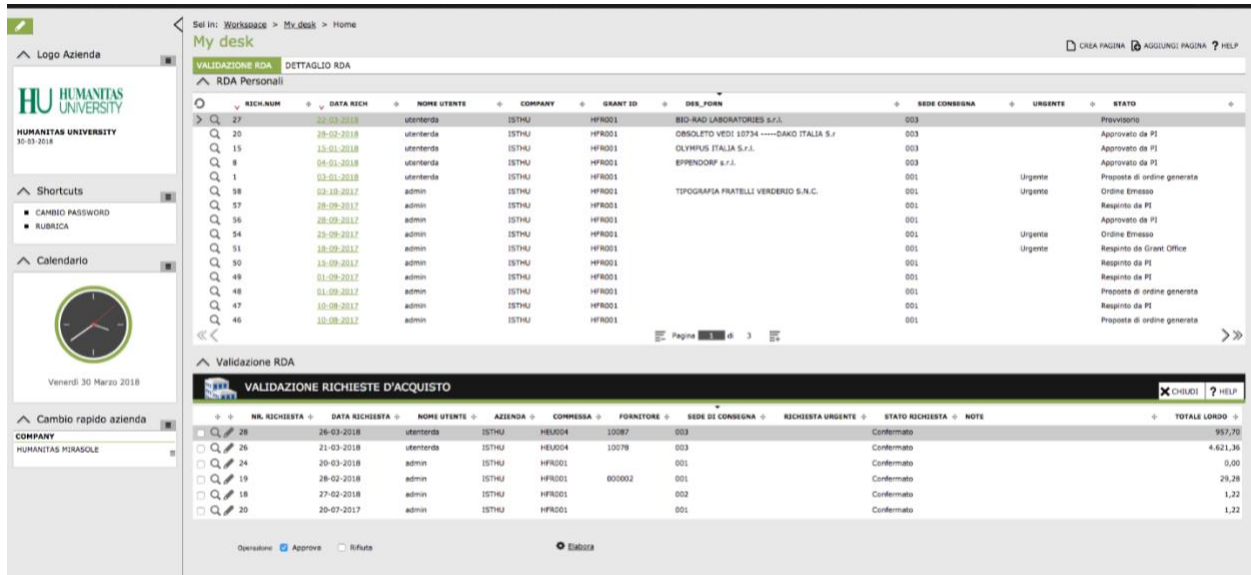
To access the system, go to the following link <https://hunimed.zucchetti.com/infinity/>, enter the credentials (username and password) received and select your company (Humanitas University / Humanitas Mirasole).

The PI will receive a daily summary email of all the RDAs awaiting its approval, which contains a direct access link to the platform.

Within your MyDesk the PI will be able to see the following areas:

- Personal RDAs (all RDAs for which it is responsible)
- RDA validation (list of all RDAs awaiting its validation)

clicking on the symbol  you can view the detail of the RDA.

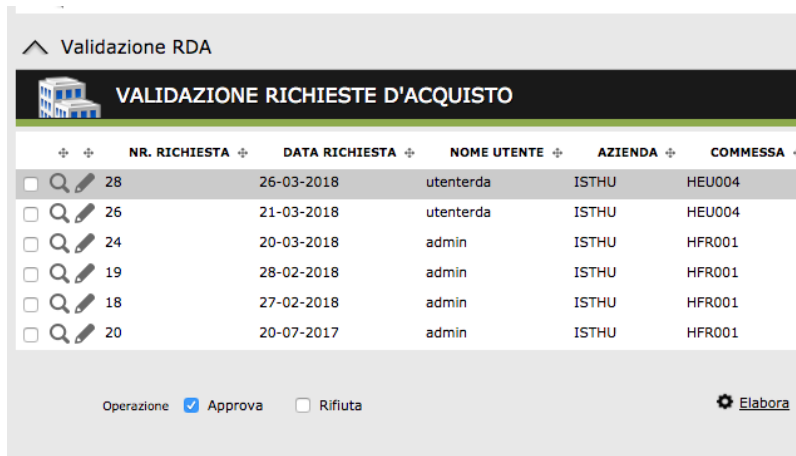


The screenshot shows the 'My desk' interface with a sidebar on the left containing navigation options like 'Logo Azienda', 'Shortcuts', 'Calendario', and 'Cambio rapido azienda'. The main area displays 'VALIDAZIONE RDA' with a table of personal requests. Below this, there is a section for 'Validazione RDA' and a table for 'VALIDAZIONE RICHIESTE D'ACQUISTO'.

NR. RICHIESTA	DATA RICHIESTA	NOME UTENTE	AZIENDA	COMMESSA	FORNITORE	SEDE DI CONSEGNA	RICHIESTA URGENTE	STATO RICHIESTA	NOTE	TOTALE LORDO
28	26-03-2018	utenterda	ISTHU	HEU004	10078	003		Confermato		957,70
26	21-03-2018	utenterda	ISTHU	HEU004	10078	003		Confermato		4.621,36
24	20-03-2018	admin	ISTHU	HFR001		001		Confermato		0,00
19	28-02-2018	admin	ISTHU	HFR001	600002	001		Confermato		29,38
18	27-02-2018	admin	ISTHU	HFR001		002		Confermato		1,22
20	20-07-2017	admin	ISTHU	HFR001		001		Confermato		1,22

To approve RDA requests you need :

- select one or more rows relating to each RDA
- select the action to be performed (Approve / Reject) (Approva / Rifiuta). In case of refusal it is necessary to fill in a refusal note field
- click on the Process key (elabora) to confirm the action



This screenshot shows a detailed view of the 'VALIDAZIONE RICHIESTE D'ACQUISTO' table. At the bottom, there are radio buttons for 'Approva' (checked) and 'Rifiuta', and a gear icon labeled 'Elabora'.

