

## 4. Type In Purchases

### Overview

This quick guide will show you how to submit a requisition for a chemical, biological or consumable that cannot be found in the SciTrack Hosted Catalogues.

1. Shopping Cart
2. Enter item details
3. Review shopping cart
4. Checkout and submit
5. DLP Approval
6. DLP submits carts to purchasing team

### Steps

#### 1. Shopping Cart

- A. Click **Shopping Cart**.
- B. Click **Add Type In Item +**.

### Screenshots

The top screenshot shows the SciTrack Research Material Management dashboard. It features a grid of buttons: Material Search, Material Create, Container Search, Receiving, Held Cart, Open Approval Items, Source Search, Structure Search, and Shopping Cart. The Shopping Cart button is highlighted with a red circle labeled 'A'. To the right, there are search bars for Source Search and Container Search.

The bottom screenshot shows the SciTrack Research Material Management interface with a search bar and navigation options. The 'Add Type In Item +' button is highlighted with a red circle labeled 'B'. Below the navigation bar, there is a message: "There are no items in your cart."

## 2. Enter item details

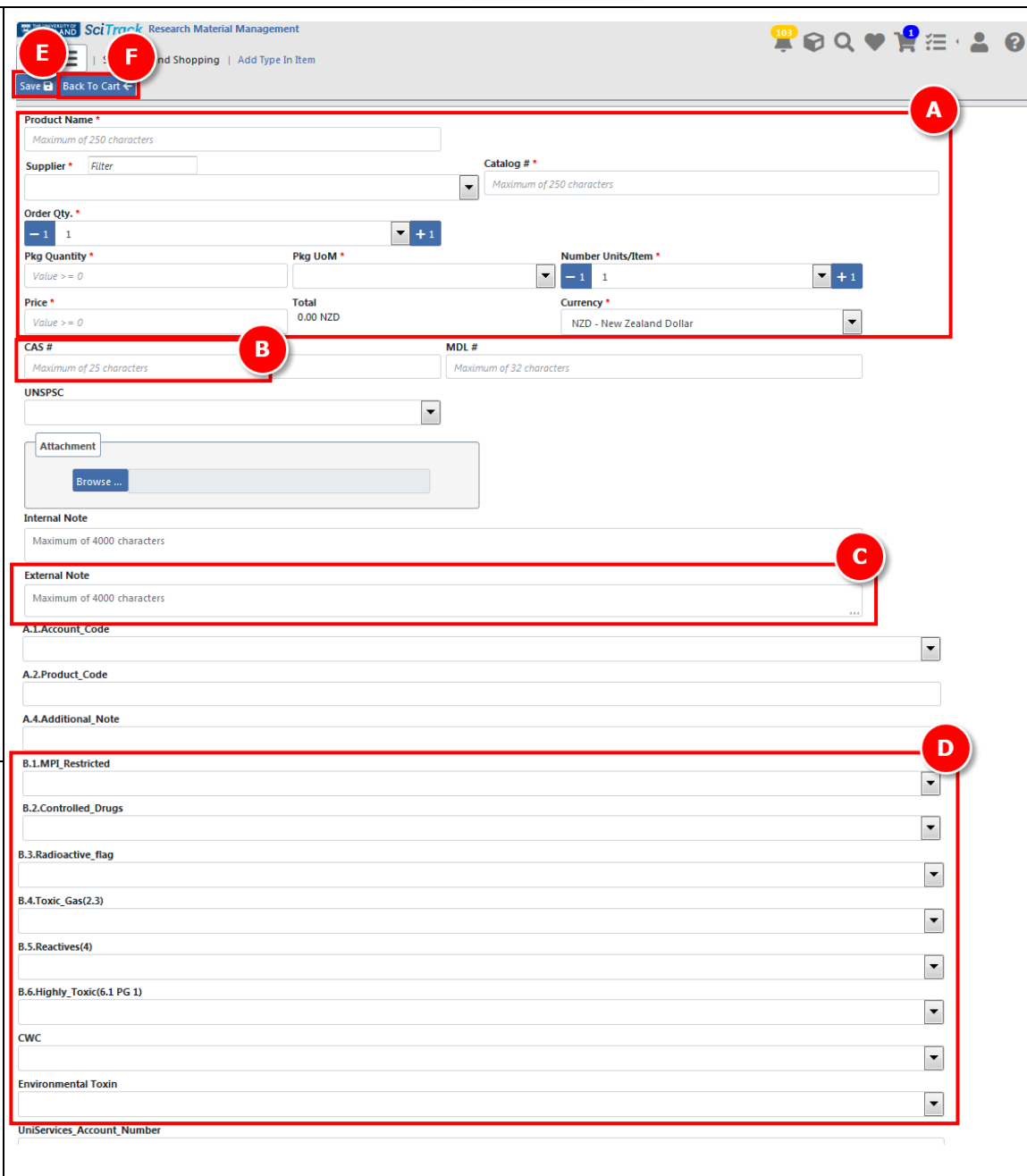
- A. Complete mandatory fields (\*).
- B. **Add the CAS number when buying a chemical.**
- C. Type **quote** numbers or other information to be sent to the supplier in the External Note field.

**Quotes:** If you have a quote, you can enter this number into the External Note field for the first item in the cart only. External notes will not be sent to the supplier for other cart items.

- D. If an item is restricted or hazardous, the appropriate field should be set to "true" from the drop down box. Otherwise leave these fields blank.
- E. Click **Save**.
- F. Click Back To Cart once you are finished adding items. Note only one supplier and currency per cart.

### **Note:**

- **Attachments:** You may attach a file to your cart but this **will not** be carried through to the purchase order. Any attachments for the supplier should be added to the STC request.
- **Currency** defaults to NZD.
- **Catalogue number** needs to exactly match the catalogue number provided by the supplier. If not available, use N/A.



The screenshot shows the 'Add Type In Item' form in the SciTrack system. Red boxes and letters A-F highlight key areas:

- A:** The main form area containing fields for Product Name, Supplier, Catalog #, Order Qty, Pkg Quantity, Pkg UoM, Number Units/Item, Price, Total, and Currency.
- B:** The CAS # field, which is mandatory for chemicals.
- C:** The External Note field, used for entering quote numbers.
- D:** A group of hazard-related fields including B.1.MPL\_Restricted, B.2.Controlled\_Drugs, B.3.Radioactive\_flag, B.4.Toxic\_Gas(2.3), B.5.Reactives(4), B.6.Highly\_Toxic(6.1 PG 1), CWC, and Environmental Toxin.
- E:** The Save button.
- F:** The Back To Cart button.

### 3. Review shopping cart

- A. Optional- click icons to **Delete** or **Edit Item**, see similar materials in stock, or view SDS. See the appendix for a description of each icon.
- B. Complete any required actions (see Matching Materials section on the next page).
- C. **Select the correct material class.**

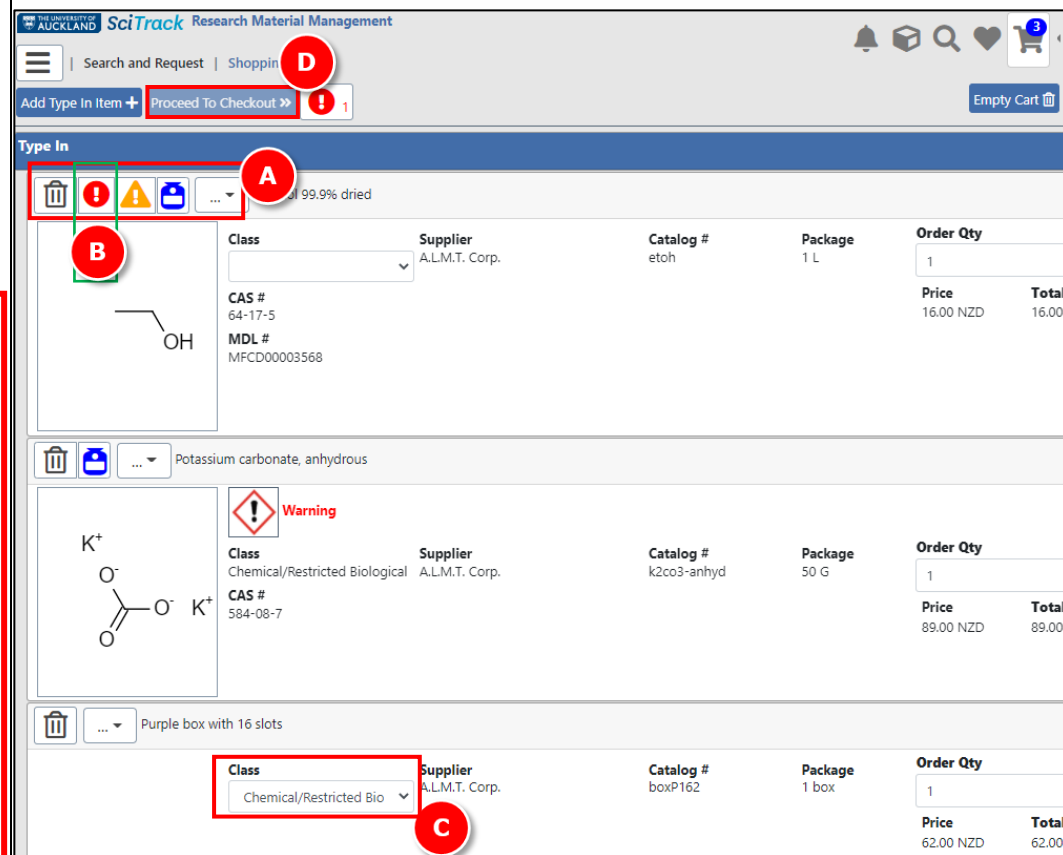
#### Choosing a material class

If an item has not been purchased before, you must select an appropriate Material Class before clicking Proceed to Checkout. These are the classes to choose from:

Class	Examples
<b>Chemical</b>	Single chemical with a CAS number or a combination of hazardous chemicals.
<b>Restricted biological</b>	Restricted cell lines, animal tissue, or kits containing animal serum (e.g. ELISA kits with BSA), usually imported from overseas.
<b>Other non-hazardous</b>	Lab equipment, unrestricted antibodies, sterile growth media, saline solutions, non-hazardous buffers

- If you don't select a class, it will default to **Chemical/Restricted Biological** and require a barcode.
- Items classified as **Other non-hazardous** will not require barcodes during receipting.
- Items classified as **Chemical** or **Restricted Biological** will require barcodes by default during receipting (but DLPs can override this if necessary).
- Material classes can be changed by editing the material in Material Search. *Please see the Quick Guide 11. Creating Materials and Containers for instructions.*

D. When finished, click Proceed to Checkout



The screenshot shows the SciTrack Research Material Management interface. At the top, there are navigation tabs for 'Search and Request' and 'Shopping'. A 'Proceed To Checkout' button is highlighted with a red box and callout 'D'. Below this, the 'Type In' section lists three items in the shopping cart:

- Item 1:** 99.9% dried. Callout 'A' points to the 'Proceed To Checkout' button. Callout 'B' points to the 'Class' dropdown menu.
- Item 2:** Potassium carbonate, anhydrous. Callout 'A' points to the 'Warning' icon.
- Item 3:** Purple box with 16 slots. Callout 'C' points to the 'Class' dropdown menu.

## **Matching Materials**


If your item can be matched to multiple materials, you will be prompted to choose the most suitable material before submitting the cart.

First click the exclamation icon  next to item name. Then click the wrench icon.

- Select the most accurate material match by selecting the radio button next to the material name. Then click **Select** to complete the matching process.
- For chemicals, ALWAYS select a material with a CAS number. Usually the one with the most hazard signs is the right one!
- If no suitable match is shown, you can try searching for something more appropriate.

Otherwise tick **"No Suitable Match Listed, Create Material"**. Please do not to choose this option for anything with a CAS number, unless you have no choice.

### Actions Required



Item matches multiple materials.



**Match Material - ETHANOL 96% REAG. PH EUR2,5 L** X

CAS # 64-17-5

**Warning**


No Suitable Match Listed, Create Material

Ethyl alcohol, Pure 64-17-5 MFC00003568 **Danger** **Controlled** **Hazardous**

ETHANOL ABSOLUTE ANALAR NP ACS/R.PE 64-17-5 MFC00003568

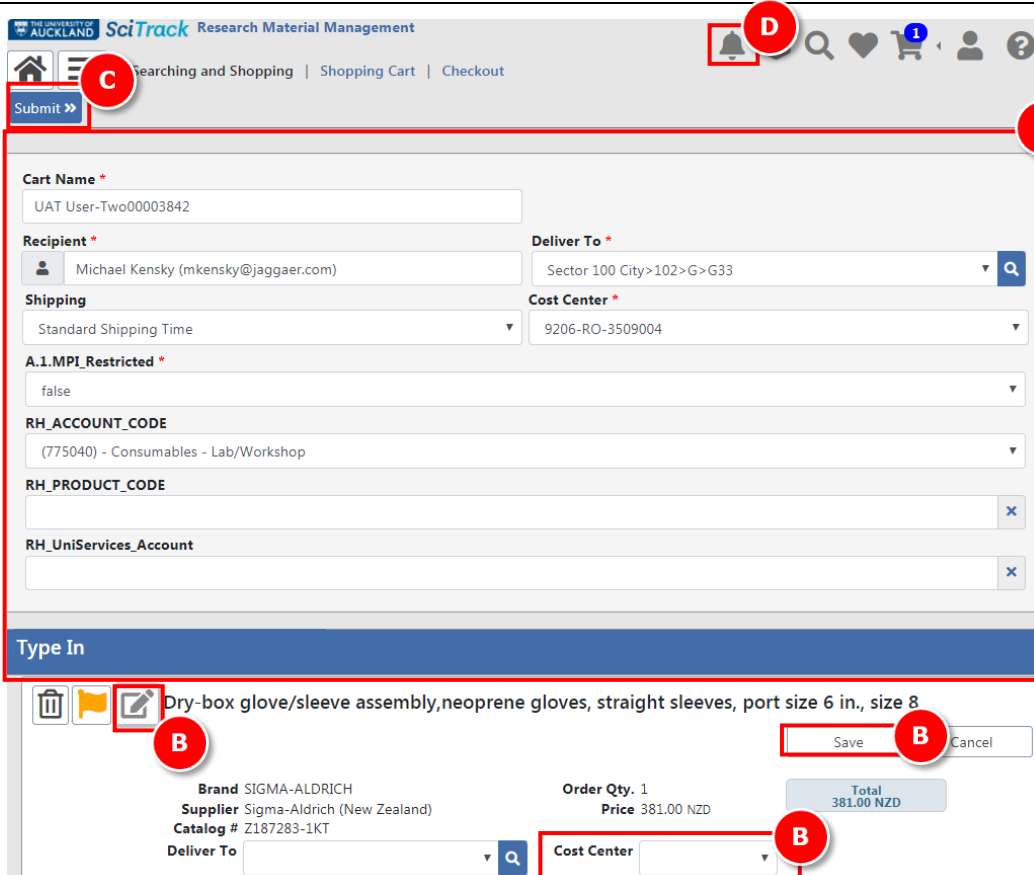
#### 4. Checkout and Submit

- A. Complete the fields (refer to Appendix).
  - **IMPORTANT:** Please do not change the Cart Name from the default
- B. Optional: you may choose a different cost centre for each line item. The 'Cost Center' selected in the header field (A) applies to all line items unless a different cost centre is selected for the line.
  - Click the pencil for the line item to display more fields
  - Choose another cost centre from the drop-down list
  - Click **Save**
- C. Click **Submit**.
- D. A notification will be generated with a pdf report of your cart. Click the notification bell, then open the report by clicking 

#### Tip:

To change the **recipient** name:

In the Checkout screen, click on your name in the Recipient field. Then type **either** the first or last name of the recipient (not both!). Wait a moment, then click the correct one.



The screenshot shows the SciTrack checkout page. At the top, there are navigation links: Home, Submit (C), Searching and Shopping, Shopping Cart, and Checkout. A notification bell (D) is in the top right. The main form contains the following fields:

- Cart Name \***: UAT User-Two0003842
- Recipient \***: Michael Kensky (mkensky@jaggaer.com)
- Deliver To \***: Sector 100 City>102>G>G33
- Shipping**: Standard Shipping Time
- Cost Center \***: 9206-RO-3509004
- A.1.MPI.Restricted \***: false
- RH\_ACCOUNT\_CODE**: (775040) - Consumables - Lab/Workshop
- RH\_PRODUCT\_CODE**: [Empty]
- RH\_UniServices\_Account**: [Empty]

Below the form is a 'Type In' section for a line item: 'Dry-box glove/sleeve assembly, neoprene gloves, straight sleeves, port size 6 in., size 8'. It includes a pencil icon (B) to edit, a 'Save' button (B), and a 'Cancel' button. Item details show: Brand SIGMA-ALDRICH, Supplier Sigma-Aldrich (New Zealand), Catalog # Z187283-1KT, Order Qty. 1, Price 381.00 NZD, and Total 381.00 NZD. A 'Cost Center' dropdown (B) is also visible.

#### 5. DLP approval

- **IMPORTANT:** Carts that are not created by DLPs require DLP approval before they can be processed by the purchasing team. Please email your cart name to your DLP who can approve the order in SciTrack.
- **DLPs please see the SciTrack Quick Guide "8. DLP cart approval and submit".**

## 6. DLPs Submit carts to purchasing

- A. Submit the request to the Shared Transaction Centre through e-Quote Purchase Order Requests.
- Go to the e-Quote request form:  
<https://www.forms.auckland.ac.nz/en/staff/financial-services/e-quote-purchase-order-request.html/>
  - Enter **cart name** into the **SciTrack cart name** field (e.g. Boyd00043128).
  - Attach supporting documentation for the supplier where required, e.g. MPI import permit.
- B. **OR** Submit **UniServices** orders to UniServices Purchasing:
- Fill out **UniServices Request Template** found on the [University SciTrack website](#)
  - Email request to [purchasing@uniservices.co.nz](mailto:purchasing@uniservices.co.nz).

Home
Search Results
Submit a request
My requests

### Submit a question to our service team

**Service \***

**[To submit a request,CLICK HERE](#)**

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Select supplier

Do you have a cart name or a replenishment number?

SciTrack cart name

SciTrack replenishment request number

SciTrack cart name






### **Note:**

- To view or edit a cart after clicking Submit, please see the SciTrack Quick Guide "7. Edit carts, track carts and reorder".

## Appendix:

Field Name	Description
<b>Recipient*</b>	<b>The recipient is the person who the item will be addressed to. Only staff members are allowed to be the recipient.</b> Note – the ownership of all barcoded items must be transferred to the Principal Investigator once the items are received. The Principal Investigator owns the ordered materials and has health and safety accountability under the Health and Safety at Work Hazardous Substances Regulations and the University Health, Safety and Wellbeing Policy.
<b>Deliver To*</b>	The delivery location will default based on the building you choose as the delivery location. This is the main inwards goods or delivery point for the building. For example, if you pick room 502-201 as the delivery location, the PO will default to the delivery address for building 502 which is 501-B33, 85 Park Avenue.
<b>Cost Center*</b>	The Cost Centres displayed are those assigned to the Recipient. If a recipient's codes are missing, please create a Staff Service Centre ticket to update SciTrack cost centres. <b>UniServices:</b> <ul style="list-style-type: none"> <li>When a UniServices cost centre code is selected ("UniServices Project") it is also necessary to supply the UniServices account number (see <b><i>RH_UniServices_Account_Number below</i></b>)</li> </ul>
<b>MPI Restricted*</b>	This will apply to all items in the cart unless MPI_Restricted has been selected at the individual line item level. This should be TRUE for any restricted biologicals.
<b>RH_PRODUCT CODE</b>	Optional: Enter the product code associated with the grant, e.g. A76x. Do not use this field for any other codes please
<b>RH_UniServices_Account_Number</b>	This field must be populated when "UniServices Project" cost centre code has been selected and must be in the appropriate format e.g. 99999.999 (5 digits, full stop, 3 digits)
<b>RH_ACCOUNT CODE</b>	Select the GL Account code this order will be charged to. ➤ <b>IMPORTANT:</b> When using a PReSS account, you must select the RH_ACCOUNT_CODE of <b>312775</b>

### Shopping Cart Icons:

	View warnings and Codes of Practice associated to the material. A link to a COP is given only for high-risk materials.		Click to see what action is required to submit your cart. Click the Fix button  to take action.
	View similar items that already exist in the inventory.		Click to check status of DLP approval. If status shows "Pending ERM Approval", you need to ask a DLP to approve the item after you submit the cart. If you are a DLP, your carts will not require DLP approval.