

## 8. DLP Cart Approval and Submit

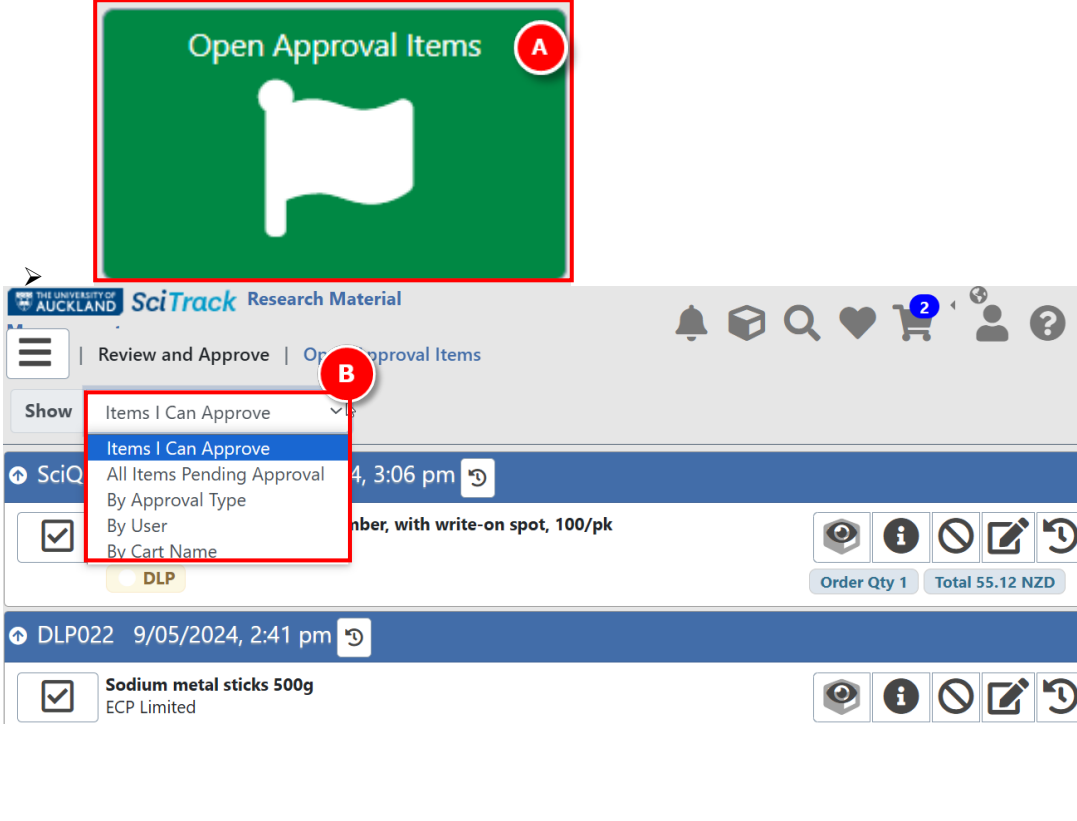
### Overview

This guide will show you how to review and approve carts in SciTrack and submit them to purchasing. Designated Lab Persons (DLPs) are responsible for approving carts for their research area and submitting them to the Shared Transaction Centre (STC).

- Carts created by DLPs do not require approval. Neither do Stockroom or Storeroom requests from internal stores.
- DLPs should only approve carts that they have been specifically asked to approve by the cart creator

1. Find Researcher Carts to Approve
2. Review and Approve Carts
3. Reviewing Chemical Purchases - CAS Numbers
4. Reviewing Chemical Purchases - Warning Flags
5. Submit carts to purchasing

### Appendix 1: Anticipated tasks associated with the DLP role in SciTrack

| Steps  | Screenshots  |
|--|--|
| <p><b>1. Find Researcher Carts to Approve</b></p> <p>A. Click <b>Open Approval Items</b>.</p> <p>B. Filter and search options are available in the "Show" drop-down. Alternatively, hold CTRL-F to search for the cart name in your browser search.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"><li>➤ <b>Open Approval Items</b> and "Items I Can Approve" shows <u>all</u> carts in your accessible site(s). <b>Please only approve the cart(s) you have been specifically asked to.</b></li><li>➤ If you need to approve carts from outside of your site, please update your Sites preferences as shown in SciTrack Quick Guide <b>2. Configure Preferences</b>.</li><li>➤ DLP-approving an item does not stop the item from going through hazard approval or financial approval. Those approvals happen as an automatic workflow once the requisition is raised in PeopleSoft Financials.</li></ul> |  <p>The screenshot displays the SciTrack Research Material interface. At the top, a green button labeled 'Open Approval Items' is highlighted with a red box and a circled 'A'. Below it, a dropdown menu is open, showing options: 'Items I Can Approve' (highlighted with a red box and a circled 'B'), 'All Items Pending Approval', 'By Approval Type', 'By User', and 'By Cart Name'. The main content area shows a list of items, including 'Sodium metal sticks 500g' from 'ECP Limited'.</p> |

## 2. Review and Approve Carts

Please review the cart using the checklist on the following page (page 3).

- A. To see a summary of the cart information, click . Note that any fields left blank will not show in the summary.
- B. For chemical purchases, click the material properties icon to check the CAS number has been entered. If the icon isn't showing, the item is likely missing its CAS number. Edit the cart to add this, following instructions in section 3.
- C. If available, click the warning flag to review it. Please refer to section 4 to see what actions may be required.
- D. To edit the cart, click . Changes are saved as you go. Click through to Proceed to Checkout and click **Submit** once you are finished.

### Approve each cart item

- E. **Click the tick icon next to each item in the cart to approve it.**

The screenshot shows the SciTrack interface. At the top, there's a navigation bar with 'Review and Approve' and 'Open Approval Items'. Below that, a dropdown menu shows 'Items I Can Approve'. A user bar indicates 'UAT User: Seven00004061' on '8/09/2020 1:51 PM'. A cart summary shows 'Order Qty 1' and 'Total 20.00 NZD'. A list of items is shown, with 'Acetone' selected. A red box highlights a tick icon (labeled 'E') next to the item name. To the right of the item name are icons for information (labeled 'A'), material properties (labeled 'B'), a warning flag (labeled 'C'), and an edit icon (labeled 'D').


The 'View material properties window' for 'Sodium hydride' is shown below. It includes hazard warnings like 'Hazardous' and 'Danger'. A sidebar on the left lists categories: 'General Info', 'Health/Safety', and 'GHS'. The 'Identifiers' section is active, showing details like 'Status Not Reviewed', 'Creator ERMSUPERUSER, ERMSUPERUSER', 'Primary CAS # 7646-69-7', 'Material Type', 'Material Source', 'Material Class Chemical/Restricted Biological', and 'Formula HNa'. A table at the bottom lists 'Cust Compound ID', 'CAS # 7646-69-7' (with a red box and label 'B'), and 'MDL # MFCD00003471'.

### 3. Reviewing Chemical Purchases- CAS Numbers


#### Adding CAS Numbers if required

All chemical cart items must have a CAS number assigned. This ensures any warning flags are applied. To add a CAS number to a cart item, go to the Shopping Cart screen. (Refer to step 2B for how to check if a CAS is assigned, and step 2D to edit a cart).

#### Adding a CAS number to a Type-in item

- A. On the Shopping Cart screen, click the  icon and click Edit Item.
- B. Type the CAS number into the CAS # field. Only put in the numbers and dashes.

#### Adding a CAS number to a Hosted Catalogue item

- C. On the Shopping Cart screen, click the  icon and click Match Material
- D. Type the CAS number into the search bar and click Search.
- E. Select the most appropriate match from the list and click Select.

\*A CAS number is a unique internationally recognised identifying code for single chemicals. You can find it on the Safety Data Sheet, supplier website, or Google. Chemical mixtures don't have a CAS and should instead be matched where possible to an existing SciTrack material, as shown in steps 3C-E above.

The screenshots illustrate the following steps:

- Step A:** On the Shopping Cart screen, a dropdown menu is opened for the item "Sodium metal sticks 500g". The "Edit Item" option is highlighted.
- Step B:** The "CAS #" field is shown with the value "7440-23-5" entered.
- Step C:** On the "Hosted Catalogs" screen, a dropdown menu is opened for the item "diisopropylether ACS 4L JTBakr". The "Match Material" option is highlighted.
- Step D:** The "Match Material" screen shows a search for "108-20-3". A suitable match is found: "Diisopropyl ether" with CAS number "108-20-3" and MFCD "MFCD00008880". Hazard icons for flammable and irritant are displayed.

#### 4. Reviewing Chemical Purchases- Hazard Flags

Once a chemical is correctly classified in SciTrack by its CAS number or a material match, the warning flag sign may display. The requestor and DLP must review all warnings before submitting the cart.

The EHS List section shows you which lists\* the chemical is associated to.

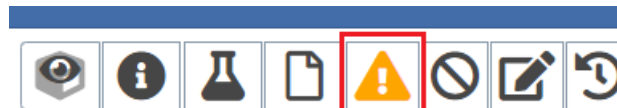
| EHS List Severity  | Actions to take  |
|--------------------|--|
| <b>Restricted</b>  | The chemical is highly hazardous and/or controlled and will be flagged for hazard approval. If you are unaware of the requirements for ordering this, contact your Hazard Approver for advice before placing the order. Read the COPs. |
| <b>Warning</b>     | The chemical has hazardous properties that you need to be aware of before placing the order. Read the COPs.  |
| <b>Information</b> | Information lists are mainly used for searching and reporting on different groups of chemicals. They are for information, no action required.  |

**If there are no EHS lists, or only those with 'Information' severity, the warning flag can be ignored.**

**If Codes of Practice (COPs)** are available, please click on the description to read additional important information

\*List Names starting with HSNO or UN contain chemicals associated with the specified HSNO or UN classification.

#### Warning flag in Open Approval Items:



**Warnings**

Controlled Restricted **Warning** Hazardous


**EHS List**


| Severity     | List Name                     |
|--------------|-------------------------------|
| Restricted 2 | UN4.3 PG1 - Highly Reactive   |
| Restricted 2 | UN6.1 PG1 - Highly Toxic      |
| Warning      | HSNO 4.3A                     |
| Warning      | HSNO 6.1A                     |
| Warning      | Unstable on prolonged storage |
| Information  | HSNO 3.1A                     |
| Information  | HSNO 6.1B                     |
| Information  | UN4 - Reactive Solids         |

**COPs**

- > Highly Reactive Solids
- > Highly Toxic Substances

**Important - DLPs must review carts to check:**

| Stage             | Description  |
|-------------------|--|
| Before purchasing | Check inventory for existing stock.  |
| Before purchasing | Before purchasing items that you know are restricted, check that required permits/licenses have been obtained.   |
| Before purchasing | Ensure there are appropriate storage facilities for the item (e.g. solvent cabinet for flammables). Refer to the SMOU for the class of chemical for details. <a href="https://www.auckland.ac.nz/en/health-safety-wellbeing/health-safety-topics/laboratory-safety/chemical-safety/lab-rules-and-safe-methods.html">https://www.auckland.ac.nz/en/health-safety-wellbeing/health-safety-topics/laboratory-safety/chemical-safety/lab-rules-and-safe-methods.html</a> |
| Shopping Cart     | Check that the item and quantity are appropriate. Consider end-of-life disposal costs and only buy the amount you require.   |
| Shopping Cart     | If ordering chemicals, CAS number must be included (refer to section 3 above). Hazard flags should be set automatically based on the CAS number, but if missing please flag manually in the item details.  |
| Shopping Cart     | Review any warning flags  and take action as required, shown in section 4 above.  |
| Shopping Cart     | Quote numbers need to be typed into the External Notes section for the first line item only.   |
| Shopping Cart     | Correct material class is selected (see note below).   |
| Checkout          | Recipient is a staff member.   |
| Checkout          | Cost Centre and product code selected are correct and approved for use.  |
| Checkout          | MPI Restricted is set to TRUE for restricted biologicals, but FALSE otherwise.   |
| Checkout          | Account code is correct (if a PReSS account is used, account code must be 312775).   |

-  indicates the item has been flagged as highly hazardous or restricted.
- Each item in a cart needs to be approved individually.
- The material class is set to “Chemical/Restricted Biological” by default. Non-hazardous items should have the material class set to “Other non-hazardous” so that barcodes are not required at time of receipting. If the material class is incorrect and cannot be changed in the cart, the material itself will need to be edited. Please refer to quick guide **11. Creating materials and containers** or email [scitrack@auckland.ac.nz](mailto:scitrack@auckland.ac.nz) for assistance.

## 5. Submit carts to purchasing

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

Select supplier

SciTrack
▼

Do you have a cart name or a replenishment number?

SciTrack cart name

SciTrack replenishment request number

SciTrack cart name

## SciTrack Quick Guide – DLP Cart Approval and Submit (Version 3.0)

### Appendix 1: Anticipated tasks associated with the DLP role in SciTrack

#### DLP working in a restricted biological containment area

- Attend the DLP Containment training course (sign up on Career Tools)
- Purchase all biologicals through SciTrack. If the supplier you need is not set up in SciTrack, contact [scitrack@auckland.ac.nz](mailto:scitrack@auckland.ac.nz)
- All restricted biological purchases should be received in SciTrack and updated in SciTrack with the correct location, owner, and BACC# or central register number (as applicable) **within 1 week of delivery**. This also applies to restricted biologicals transferred into a containment facility.
- Restricted biologicals that are created in-house (not purchased) should be entered into SciTrack **within 1 month of creation**. This can be done by sending the SciTrack biologicals upload template to [scitrack@auckland.ac.nz](mailto:scitrack@auckland.ac.nz)
- Ensure the SciTrack containers of restricted biologicals include all applicable identifiers (e.g. BACC#, central register number (e.g. GRAF#), HSNO application#), and have owner/location updated as required.
- When disposed of or destroyed, the SciTrack container must be recorded as disposed and the method of disposal or destruction noted. Transfers out to other facilities and exports must also be recorded as disposed.

#### DLP required to purchase chemicals

- Purchase all chemicals through SciTrack. If the supplier you need is not set up in SciTrack, contact [scitrack@auckland.ac.nz](mailto:scitrack@auckland.ac.nz)
- Include the CAS number when purchasing chemicals, and ensure any highly hazardous chemicals have the appropriate hazard class flag (e.g. UN6.1 PG1 Highly Toxic).
- All chemical purchases must be received in SciTrack with a physical barcode applied, then transferred in to the correct SciTrack location and owner within 1 week of receipt.
- When disposed of or destroyed, the SciTrack container must be recorded as disposed empty (if used up) or disposed (if sent away for chemical disposal). Transfers out to other facilities and exports must also be recorded as disposed.
- <https://www.auckland.ac.nz/en/health-safety-wellbeing/health-safety-topics/laboratory-safety/chemical-safety/purchase-storage-disposal-chemicals.html>

#### DLP not lab-based (typically purchases only non-hazardous items)

- Seek advice before creating or approving carts that may contain chemicals or restricted biologicals.
- All purchases through SciTrack-listed suppliers must go through SciTrack, including raising purchase orders for repairs or maintenance.
- Receipt all SciTrack orders in SciTrack (unless they have already been receipted by the staff at the delivery point). Once receipted in SciTrack, you do not have to request receipt through the Staff Service Centre.
- Dispose of any barcodes in SciTrack that have been applied during receipting by mistake.