

8. DLP Cart Approval and Submit

Overview

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

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

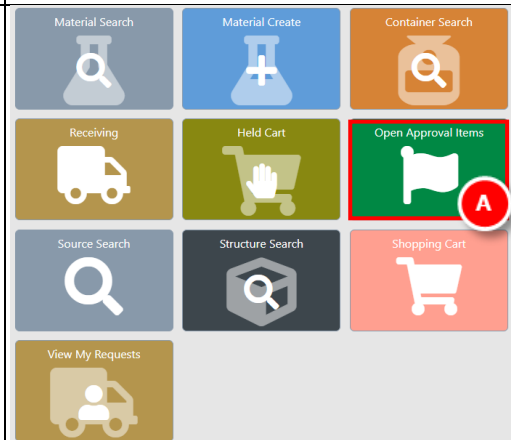
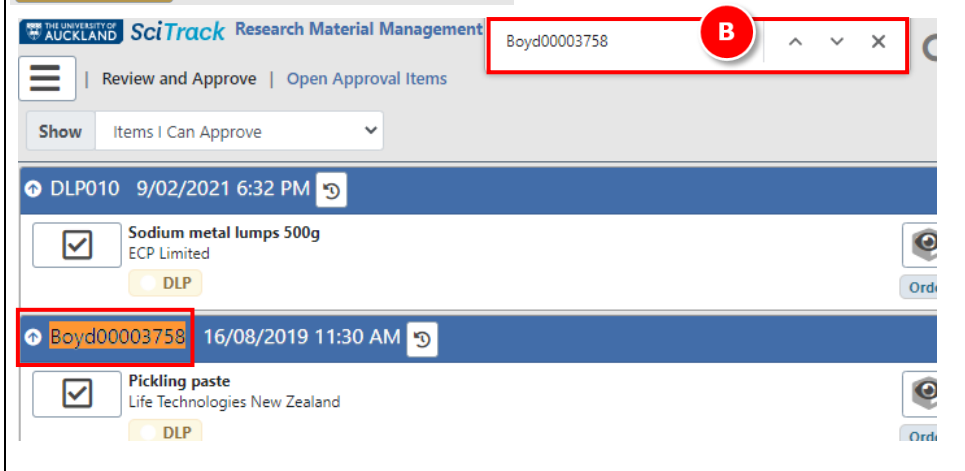
1. Find Researcher Carts to Approve

2. Review and Approve Carts

3. Submit carts to purchasing




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

Appendix 2: What is a DLP and how can I become one?

Steps	Screenshots
<p>1. Find Researcher Carts to Approve</p> <p>A. Click Open Approval Items.</p> <p>B. Search for the cart by holding CTRL-F, then type the cart name in the browser search bar. The cart you have searched should show with orange highlighting on the cart name.</p> <p>Note:</p> <ul style="list-style-type: none">➤ Open Approval Items and "Items I Can Approve" shows <u>all</u> carts in your site. Please only approve the cart(s) you have been specifically asked to.➤ If you need to approve carts from outside of your site, please update your All Sites preferences as shown in guide 2. Configure preferences.➤ DLP-approving an item does not stop the item from going through hazard approval or financial approval. Both approvals happen as an automatic workflow once the requisition is raised in PeopleSoft Financials.	 

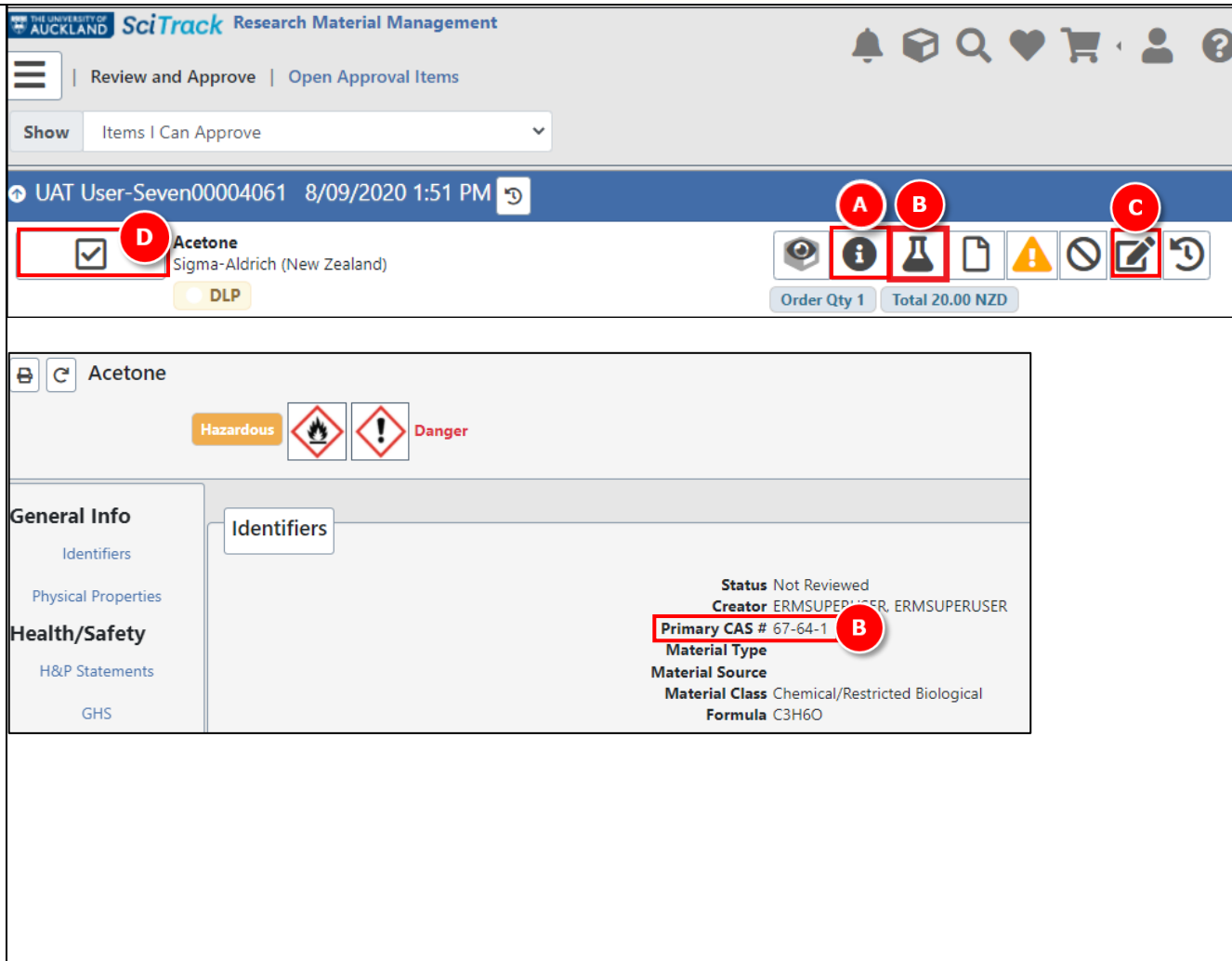
2. Review and Approve Carts

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.
- C. 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

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



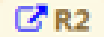
The screenshot shows the SciTrack Research Material Management interface. At the top, there is a header with the University of Auckland logo and the SciTrack logo. Below the header, there is a navigation bar with "Review and Approve" and "Open Approval Items" links. A dropdown menu shows "Items I Can Approve". The user information bar displays "UAT User-Seven00004061" and the date/time "8/09/2020 1:51 PM".

The main content area shows a cart item for "Acetone" by "Sigma-Aldrich (New Zealand)". The item card includes a checklist with a tick icon (D), a material properties icon (B), and an edit icon (C). The item is marked as "DLP". The order quantity is 1 and the total is 20.00 NZD.

The detailed view of the item shows "Acetone" with "Hazardous" and "Danger" labels. The "General Info" section includes "Identifiers" and "Physical Properties". The "Health/Safety" section includes "H&P Statements" and "GHS". The "Identifiers" section shows "Status Not Reviewed", "Creator ERMSUPERUSER, ERMSUPERUSER", "Primary CAS # 67-64-1" (B), "Material Type", "Material Source", "Material Class Chemical/Restricted Biological", and "Formula C3H6O".

Important - DLPs must review carts to check:

Stage	Description
Before purchasing	Check inventory for existing stock.
Before purchasing	Permits obtained for any restricted items.
Before purchasing	Ensure there are appropriate storage facilities for the item (e.g. solvent cabinet for flammables).
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. Hazard flags should be set automatically based on the CAS number, but if missing please flag manually in the item details.
Shopping Cart	Quote numbers need to be typed into the External Notes section for the first line item.
Shopping Cart	Correct material class is selected (see note below).
Checkout	Recipient is a DLP or Principal Investigator (PI).
Checkout	Cost Centre/product code selected are approved for use.
Checkout	MPI Restricted is set to TRUE for restricted biologicals, but FALSE otherwise.
Checkout	RH ACCOUNT CODE is correct for the cost centre (if a PReSS account is used, 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. Other 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 for assistance.

3. 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/>
 - Choose SciTrack as the supplier
 - 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.

Home Search Results Submit a request My requests

Submit a question to our service team

Service *

Shared Transaction Centre (STC) ▼

Request to Purchase ▼

e-Quote Purchase Request /SciTrack ▼

[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

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
- 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
- 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
- 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.staff.auckland.ac.nz/en/human-resources/health-safety-and-wellbeing/health-and-safety-risk-management/chemical-safety.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.

Appendix 2: What is a DLP for SciTrack and how can I become one?

A Designated Laboratory Person (DLP) is a staff member with technical knowledge about the items they need to purchase through SciTrack.

What does a DLP do?

The main role is to approve SciTrack carts. All SciTrack carts created by non-DLPs (excluding stockroom orders) must have DLP approval before they can be processed by the Shared Transaction Centre (STC).

A SciTrack DLP:

- ➔ Approves and has oversight of shopping carts to ensure health and safety standards are adhered to.
- ➔ Usually submits the cart request to the STC.
- ➔ Ensures ordered items are receipted in SciTrack and updated with the correct owner and location.

What is DLP approval?

DLP approval is to check that a SciTrack cart has been created correctly. This is different from financial approval of the use of a grant which happens later in PeopleSoft Financials.

The DLP checks:

- Correct cost centre/account code selected (that the cart creator is allowed to charge to)
- Recipient is either the PI or a DLP (**not a student**).
- The laboratory has appropriate facilities to store the item safely
- Order quantity is appropriate; only buy what you need and check the inventory first to see if you can borrow from someone else
- Restricted biologicals or chemicals have the appropriate permits and authorisation, and are flagged correctly in SciTrack

After a non-DLP SciTrack user creates a SciTrack cart, they need to email their DLP with the name of their cart to approve. There is no automatic notification to the DLP.

How can I be a DLP?

Please complete the "Request change in cost centres, location, or DLP role" form on the Getting Started page of the [SciTrack website](#). Your request will be reviewed to check that you are an eligible staff member (not on a casual contract), and that there is a need to have an additional DLP in your area.