

9. Receipting and Transferring Orders

Overview

Items that you have ordered through SciTrack need to be **receipted** in SciTrack and then **transferred** to the owner and final location. This quick guide will show you how to do so.

- **Receipting** (aka receiving) is sometimes completed in the inwards goods store. Otherwise items should be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP or requestor for all barcoded items.
- When an item is receipted in SciTrack, it will be automatically receipted in PeopleSoft Financials/UniServices Purchasing within 1-3 days.
- 1. Receipting part 1: Search for a purchase order
- 2. Receipting part 2: Select items to receive
- 3. Receipting part 3: Review and receive an item
- 4. Transfer barcoded items

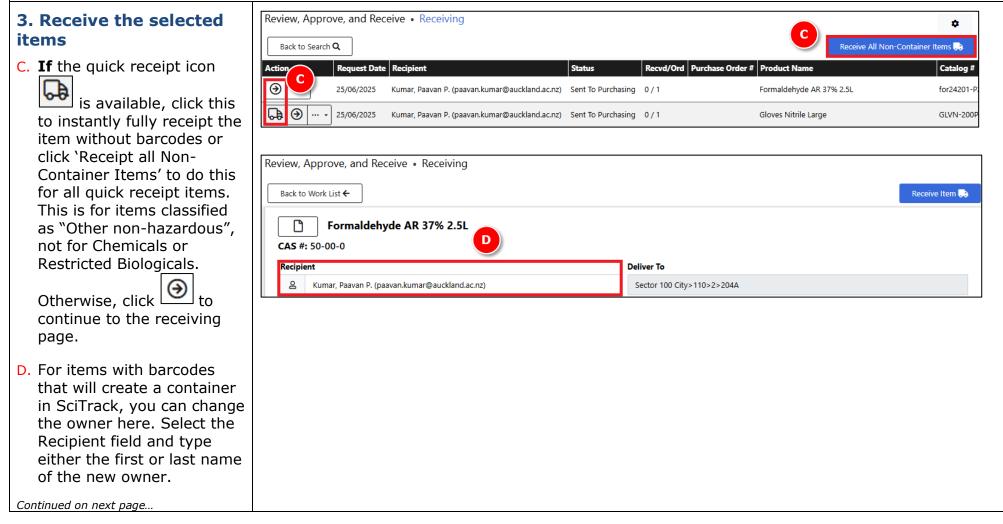
Steps	Screenshots
 Search for a purchase order A. Click Receiving. B. Enter PO number or cart name in the Search Term field. C. Click Search Tip: Uncheck the "Show only open items" box to view orders that have already been receipted. 	Review, Approve, and Receive • Receiving • No Receiving Search Locations selected. All rooms will be searched. • Emergence • Show only open items
 2. Select items to receive A. Check the items you want to receive. B. Click Proceed to Receiving Work List (1) to add selected items to Work List. 	Review, Approve, and Receive • Receiving 2 Results Proceed to Receiving Work List (0) 2 Results Proceed to Receiving Work List (0) Image: Comparison of the

Document Owner: Hazards and Containment Manager Content Manager: Chemical Risk Management Advisor SciTrack



Note:

- Click heading to select all items in the search screen.
- Click to cancel the request item (note that this will not cancel the purchase order for the supplier you will need to contact the STC for this.



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- E. Change the **Quantity to Receive** value if Review, Approve, and Receive • Receiving you have received a partial order. Back to Work List 🗲 F. Make sure **Create Containers** is checked Formaldehvde AR 37% 2.5L D for all chemicals and restricted biologicals. CAS #: 50-00-0 Uncheck it to receive a non-hazardous item Recipient **Deliver** To without barcodes (DLPs only). & Kumar, Paavan P. (paavan.kumar@auckland.ac.nz) Sector 100 City>110>2>204A Amount: 2.5 L Supplier/Catalog #: ECP Limited/for24201-P2500 Brand/Mfr. #: ECP Brand/24201-P2500 Important: > Please make sure you only uncheck Quantity to Receive (1 Outstanding) **Dutstanding after Receipt** Create Containers (F) for non-hazardous + items. Unchecking Create Containers on Create Co chemicals or restricted biologicals may Label Name breach the Health and Safety at Work Formaldehyde AR 37% 2.5L Value will be set to purity from the request ite Hazardous Substances Regulations, Lot # **Container Storage Code** Expiration Date HSNO Regulations and the University Ē 28/6/2028 Health, Safety and Wellbeing Policy. Container Bar Codes (Please enter 1 Bar Codes) G G. Scroll to the bottom of the page to Add 🕂 type/scan the pre-printed barcode to be attached to the item. If typing, click Add + after each bar code. **Receiving partial orders:** Receive Item H. Click to complete the > If you receive a partial order, the Quantity Outstanding receipt. after Receipt will automatically calculate what is Note: outstanding. \geq Click Package Information button to open Package Information Details pane and edit if
 - If the quantity received is less than what is outstanding and you are not expecting any further receipts for the item, change Quantity Outstanding after Receipt to 0.

required (I). Expanding this section lets you

barcodes are asked for.

change the Lot Size, which determines how many



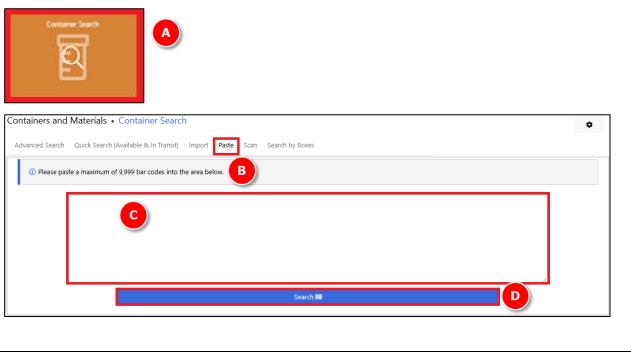
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4. Transferring items

This feature allows you to change the location and/or the owner of inventory items. For more information about the Container Search window, please see SciTrack Quick Guide "10. Container Search and Operations"

- A. Click **Container** Search.
- B. Click Paste tab.
- C. Type or paste in the barcode(s).
- D. Click Search.





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- E. Select the containers to transfer.
- F. Click **Operations** and select **Transfer Owner/Location.**
- G. Changing owner:
 - a. Enter first name or surname.
 - b. Select desired user.
- H. Changing location:
 - a. Select location from drop-down list **OR**
 - b. If required location is not available, use location search button to select the location.
- I. Click Transfer.

Note:

- > Owner defaults to the logged-in user.
- The locations drop-down is populated by the selected recipient's alternate delivery locations. You may change your own alternate delivery locations in User Preferences.
- For more details on how to transfer only the owner or location, please see the SciTrack Quick Guide "10. Container Search and Operations"

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