

# 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.

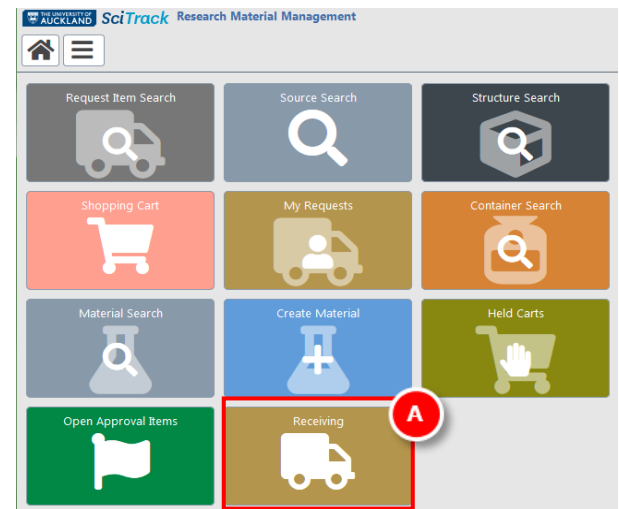
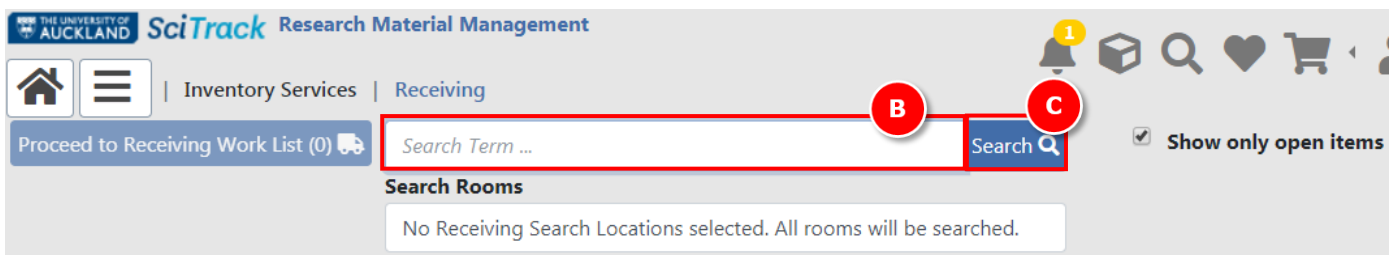
- **Receipting (aka receiving)** is sometimes completed in the inwards goods store. Otherwise items should be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP or requestor for all barcoded items.
- When an item is receipted in SciTrack, it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

### 1. Receipting part 1: Search for a purchase order

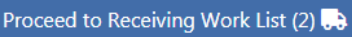
### 2. Receipting part 2: Select items to receive

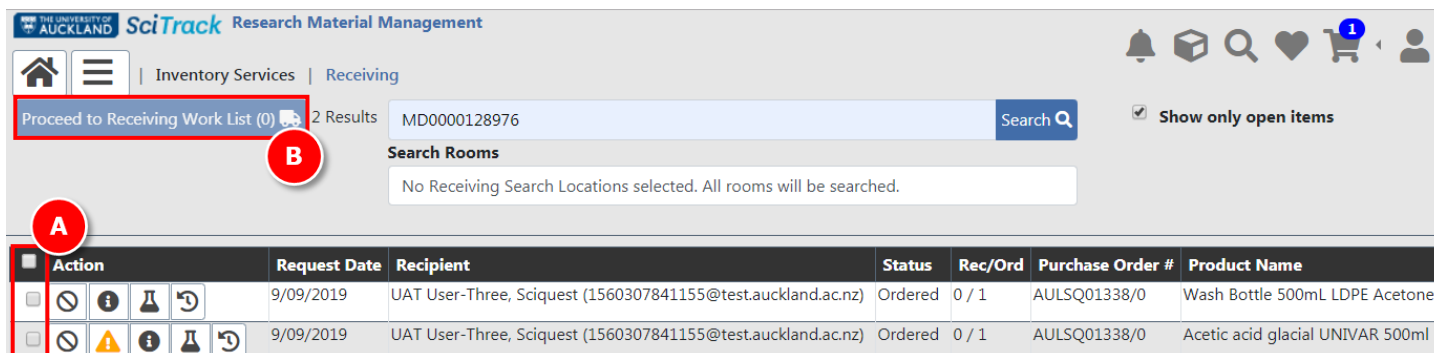
### 3. Receipting part 3: Review and receive an item









### 4. Transfer barcoded items

Steps	Screenshots
<p><b>1. Search for a purchase order</b></p> <p>A. Click <b>Receiving</b>.</p> <p>B. Enter P.O. number or cart name in the <b>Search Term</b> field.</p> <p>C. Click <b>Search</b>.</p> <p><b>Tip:</b> Uncheck the “Show only open items” box to view orders that have already been receipted.</p>	 <p>The screenshot shows the SciTrack Research Material Management dashboard. A grid of buttons includes 'Request Item Search', 'Source Search', 'Structure Search', 'Shopping Cart', 'My Requests', 'Container Search', 'Material Search', 'Create Material', 'Held Carts', and 'Open Approval Items'. The 'Receiving' button, which features a truck icon, is highlighted with a red border and a red circle containing the letter 'A'.</p>  <p>The second screenshot shows the search interface. The breadcrumb navigation reads 'Inventory Services   Receiving'. A search bar contains the text 'Search Term ...' and is highlighted with a red box and the letter 'B'. To the right of the search bar is a blue 'Search' button with a magnifying glass icon, highlighted with a red box and the letter 'C'. A checkbox labeled 'Show only open items' is visible to the right of the search bar. Below the search bar, a message states: 'No Receiving Search Locations selected. All rooms will be searched.'</p>

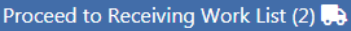


## 2. Select items to receive

- A. Check the items you want to receive.
- B. Click  to add selected items to Work List.





Action	Request Date	Recipient	Status	Rec/Ord	Purchase Order #	Product Name
   	9/09/2019	UAT User-Three, Sciqest (1560307841155@test.auckland.ac.nz)	Ordered	0 / 1	AULSQ01338/0	Wash Bottle 500mL LDPE Acetone l
   	9/09/2019	UAT User-Three, Sciqest (1560307841155@test.auckland.ac.nz)	Ordered	0 / 1	AULSQ01338/0	Acetic acid glacial UNIVAR 500ml

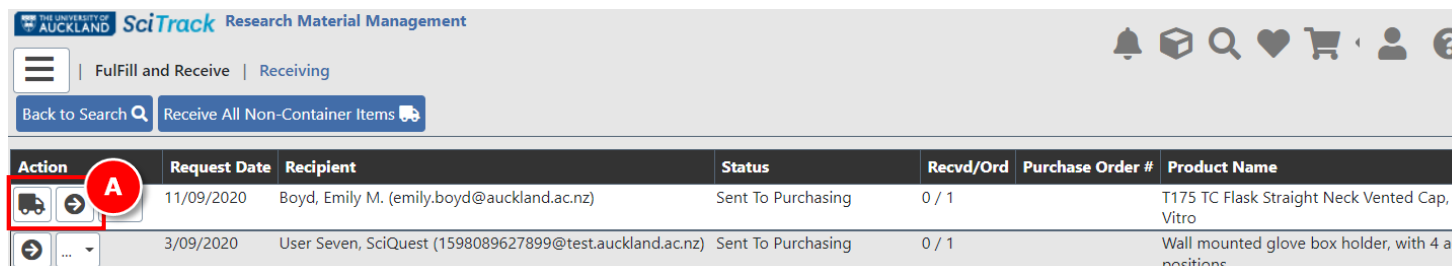
### Note:




- **Proceed to Receiving Work List**  displays the number of items to be added to your Work List. The **Work List** is a group of request items that are ready to be received, but not necessarily from the same shopping cart.
- 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).

## 3. Receive the selected items

- A. **If** the quick receipt icon  is available, click this to instantly fully receipt the item without barcodes. This is for items classified as "Other non-hazardous". Otherwise, click  to enter the receipting window.

Continued on next page...



Action	Request Date	Recipient	Status	Recvd/Ord	Purchase Order #	Product Name
 	11/09/2020	Boyd, Emily M. (emily.boyd@auckland.ac.nz)	Sent To Purchasing	0 / 1		T175 TC Flask Straight Neck Vented Cap, 5p Vitro
 ...	3/09/2020	User Seven, SciQuest (1598089627899@test.auckland.ac.nz)	Sent To Purchasing	0 / 1		Wall mounted glove box holder, with 4 adj positions

- B. Change the **Quantity to Receive** value if you have received a partial order.
- C. Make sure **Create Containers** is checked for all chemicals and restricted biologicals. Uncheck it to receive a non-hazardous item without barcodes (DLPs only).

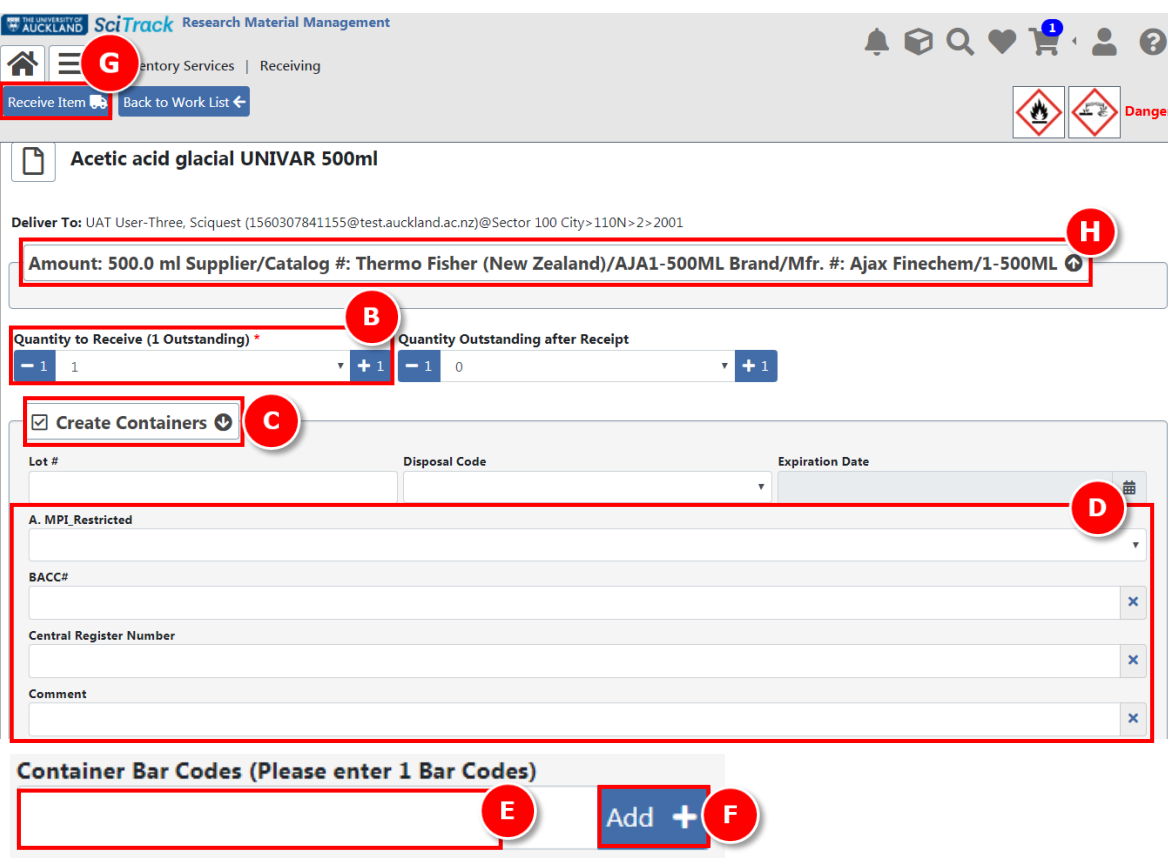
### Important:

- Please make sure you only uncheck Create Containers (C) for non-hazardous items.
- Unchecking Create Containers on chemicals or restricted biologicals may breach the Health and Safety at Work Hazardous Substances Regulations, HSNO Regulations and the University Health, Safety and Wellbeing Policy.

- D. If a container is to be created, fill in all relevant fields (mainly used for biologicals).
- E. Scroll to the bottom of the page to enter/scan the pre-printed barcode to be attached to the item.
- F. Click **Add +** after each bar code.
- G. Click **Receive Item** to complete the receipt.

### Note:

- Click Package Information button to open Package Information Details pane and edit if required (H). **This lets you change the Lot Size which determines how many barcodes are asked for.**
- Click **Back to Work List** to stop receiving.



UNIVERSITY OF AUCKLAND SciTrack Research Material Management

Inventory Services | Receiving

Receive Item **G** Back to Work List ←

**Acetic acid glacial UNIVAR 500ml**

Deliver To: UAT User-Three, Sciquest (1560307841155@test.auckland.ac.nz)@Sector 100 City>110N>2>2001

**Amount: 500.0 ml Supplier/Catalog #: Thermo Fisher (New Zealand)/AJA1-500ML Brand/Mfr. #: Ajax Finechem/1-500ML** **H**

Quantity to Receive (1 Outstanding) \* **B** Quantity Outstanding after Receipt

- 1 1 + 1 - 1 0 + 1

**Create Containers** **C**

Lot #	Disposal Code	Expiration Date
A. MPI Restricted <b>D</b>		
BACC#		
Central Register Number		
Comment		

Container Bar Codes (Please enter 1 Bar Codes)

**E** **Add +** **F**

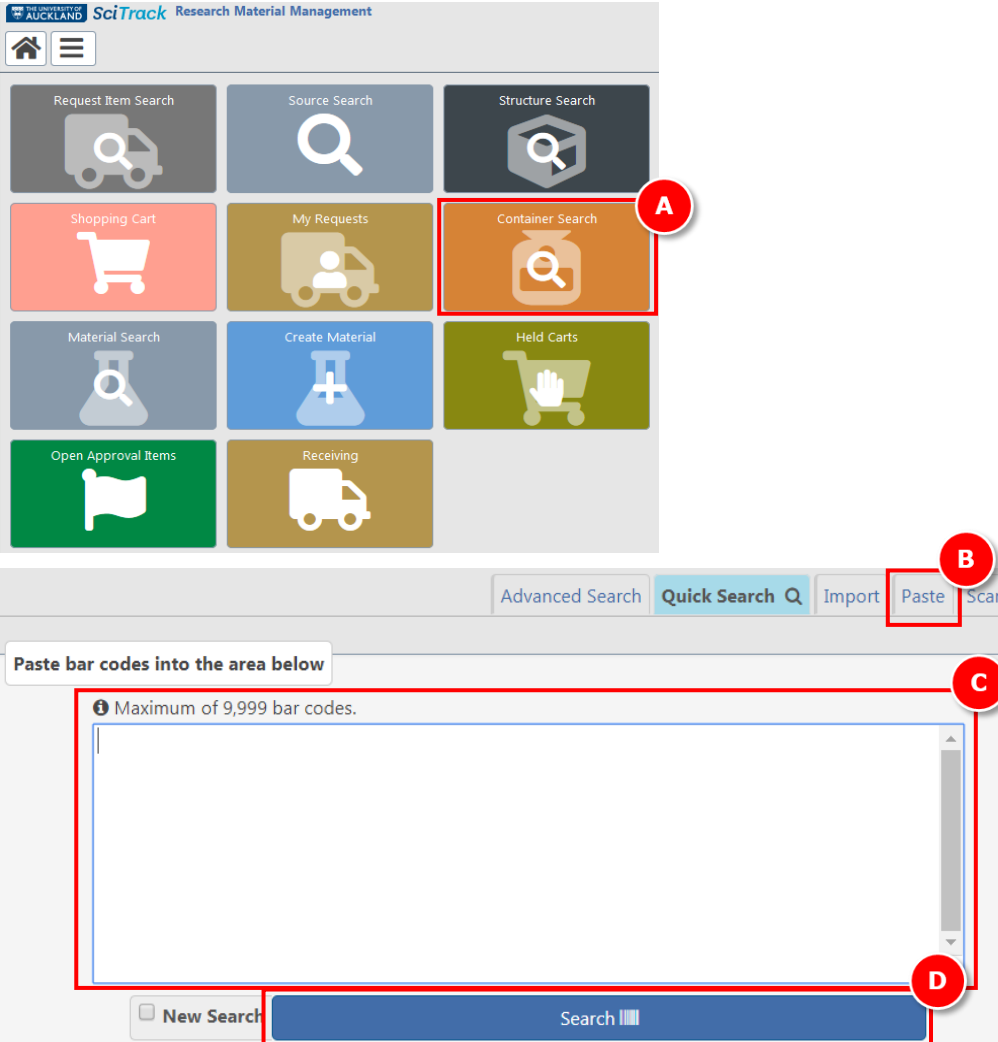
### Receiving partial orders:

- If you receive a partial order, the Quantity Outstanding after Receipt will automatically calculate what is outstanding.
- 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.

## 4. Transferring items

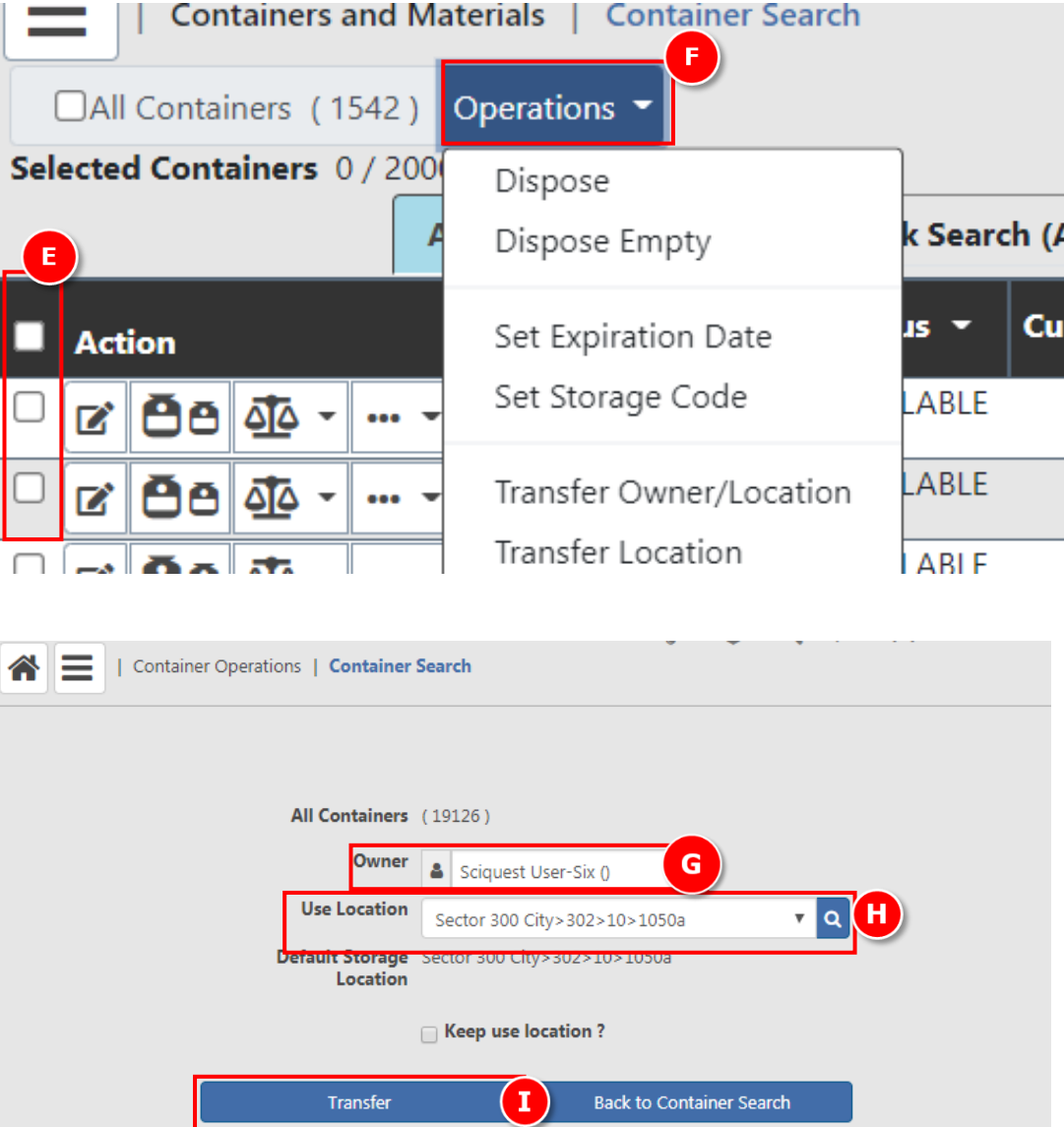
This feature allows you to change the location and/or the owner of inventory items. For more information about the Container Search window, please see *SciTrack Quick Guide "10. Container Search and Operations"*

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



The screenshot displays the SciTrack Research Material Management interface. The top navigation bar includes a home icon, a menu icon, and the SciTrack logo. Below this is a grid of search and management options: Request Item Search, Source Search, Structure Search, Shopping Cart, My Requests, Container Search (highlighted with a red box and labeled 'A'), Material Search, Create Material, Held Carts, Open Approval Items, and Receiving. Below the grid is a search bar with tabs for Advanced Search, Quick Search Q, Import, Paste (highlighted with a red box and labeled 'B'), and Scan. Below the search bar is a text input area labeled 'Paste bar codes into the area below' (labeled 'C') with a note 'Maximum of 9,999 bar codes.' and a search button (labeled 'D').

- 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**.



The screenshot displays the SciTrack interface for container operations. The top section shows a table of containers with an 'Operations' dropdown menu open, highlighting 'Transfer Owner/Location'. The bottom section shows the 'Container Operations' form with fields for 'Owner' (Sciquest User-Six) and 'Use Location' (Sector 300 City>302>10>1050a), and a 'Transfer' button.

**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"