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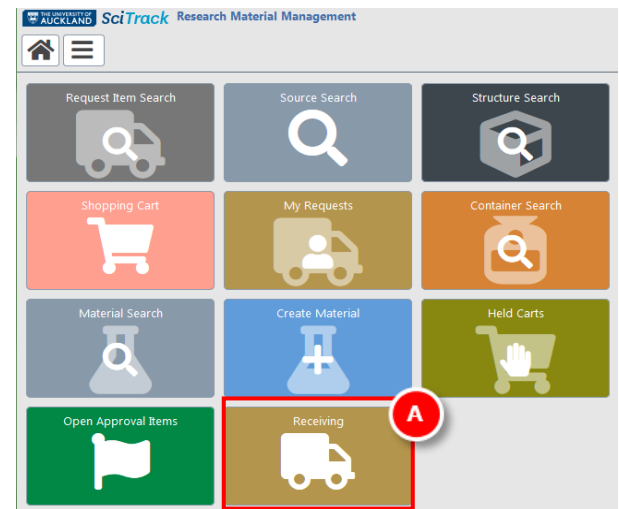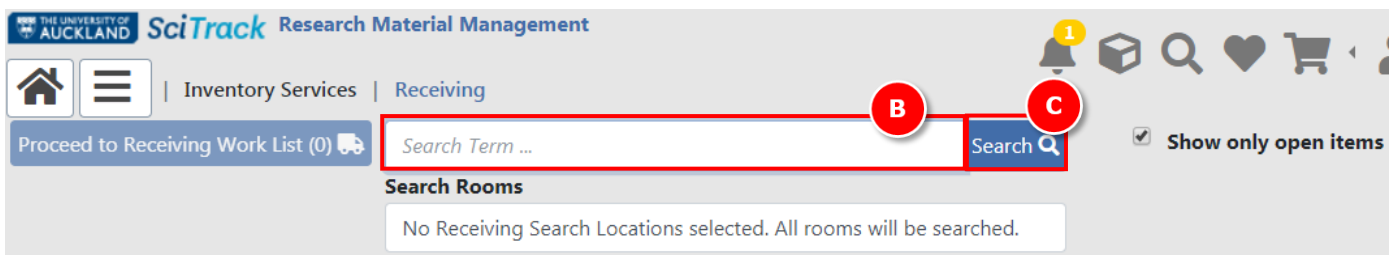
- **Receipting** (**aka receiving**) is sometimes completed in the inwards goods store. Otherwise items should be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP or requestor for all barcoded items.
- When an item is receipted in SciTrack,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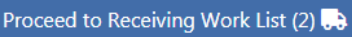
1. Receipting part 1: Search for a purchase order
2. Receipting part 2: Select items to receive
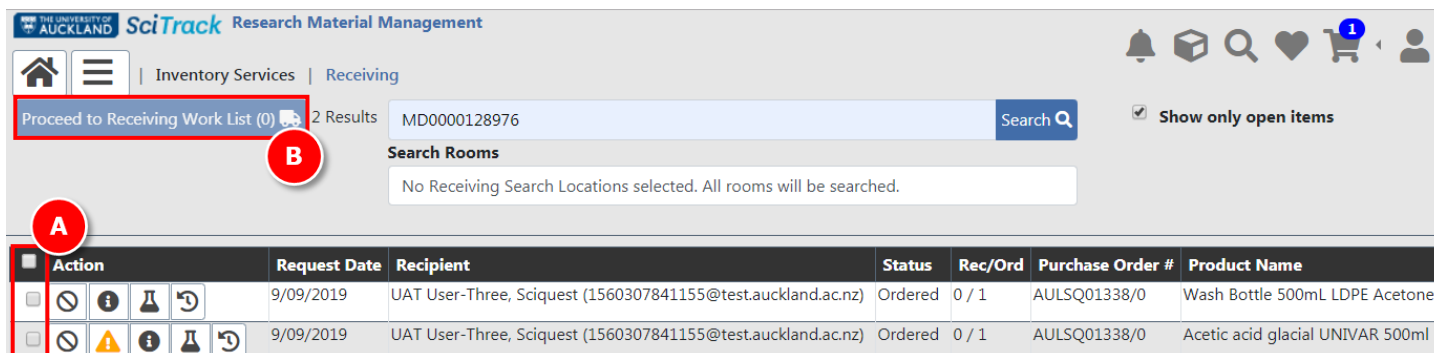**3. Receipting part 3: Review and receive an item**
4. Transfer barcoded items

| Steps	Screenshots
1. Search for a purchase order A. Click **Receiving**. B. Enter P.O. 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.	

2. Select items to receive

A. Check the items you want to receive.

B. Click [Proceed to Receiving Work List (2)] to add selected items to Work List.

Note:

➢ **Proceed to Receiving Work List** [Proceed to Receiving Work List (2)] 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.

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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…

B. Change the **Quantity to Receive** value if you have received a partial order.

C. Make sure **Create Containers** is <u>checked</u> for all chemicals and restricted biologicals. Uncheck it to receive a non-hazardous item without barcodes (DLPs only).

<div style="border: 2px solid red;">

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.
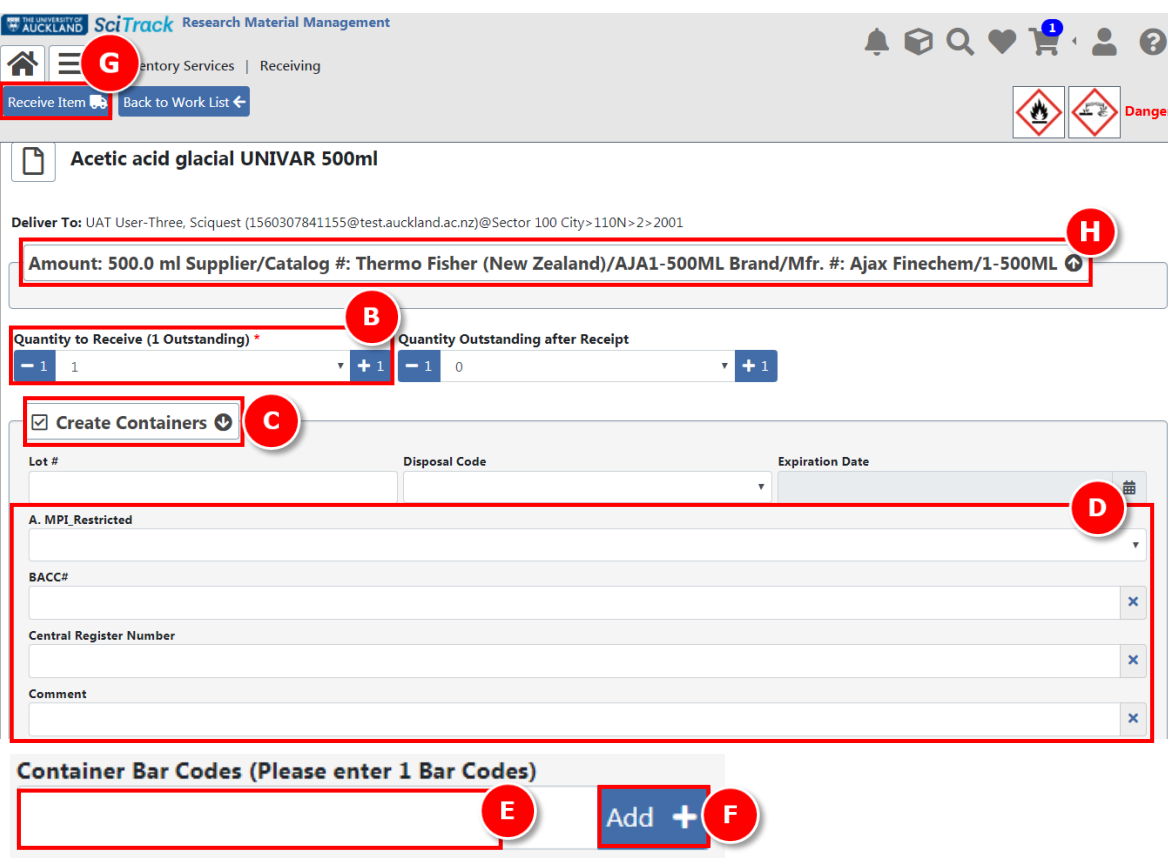
</div>

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.

SciTrack Research Material Management

Receive Item 🚚 | 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 ⊕

Quantity to Receive (1 Outstanding) *
− 1 | 1 | + 1

Quantity Outstanding after Receipt
− 1 | 0 | + 1

☑ **Create Containers** ⊕

Lot #	Disposal Code	Expiration Date
	▼	📅

A. MPI_Restricted
▼

BACC#
✕

Central Register Number
✕

Comment
✕

Container Bar Codes (Please enter 1 Bar Codes)

[   ]   Add +
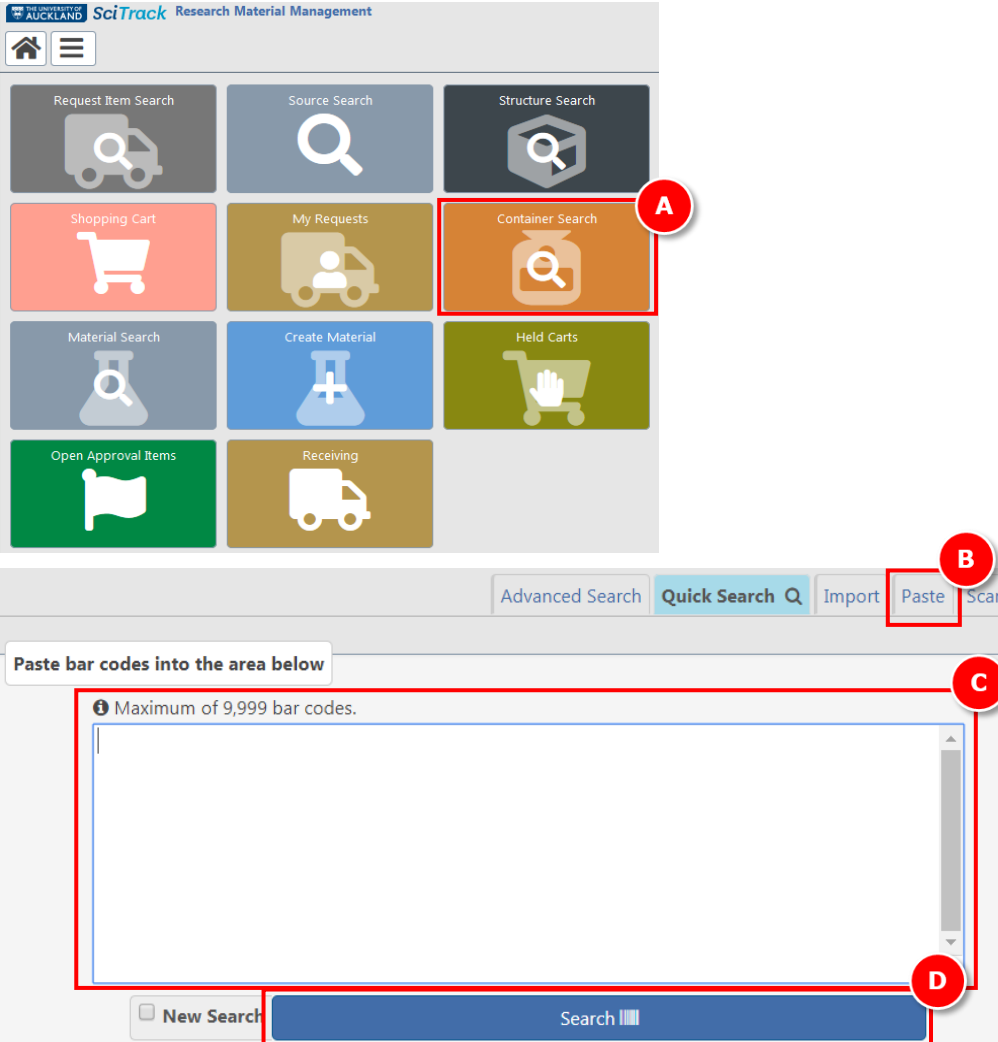

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Receiving partial orders:

➢ 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.
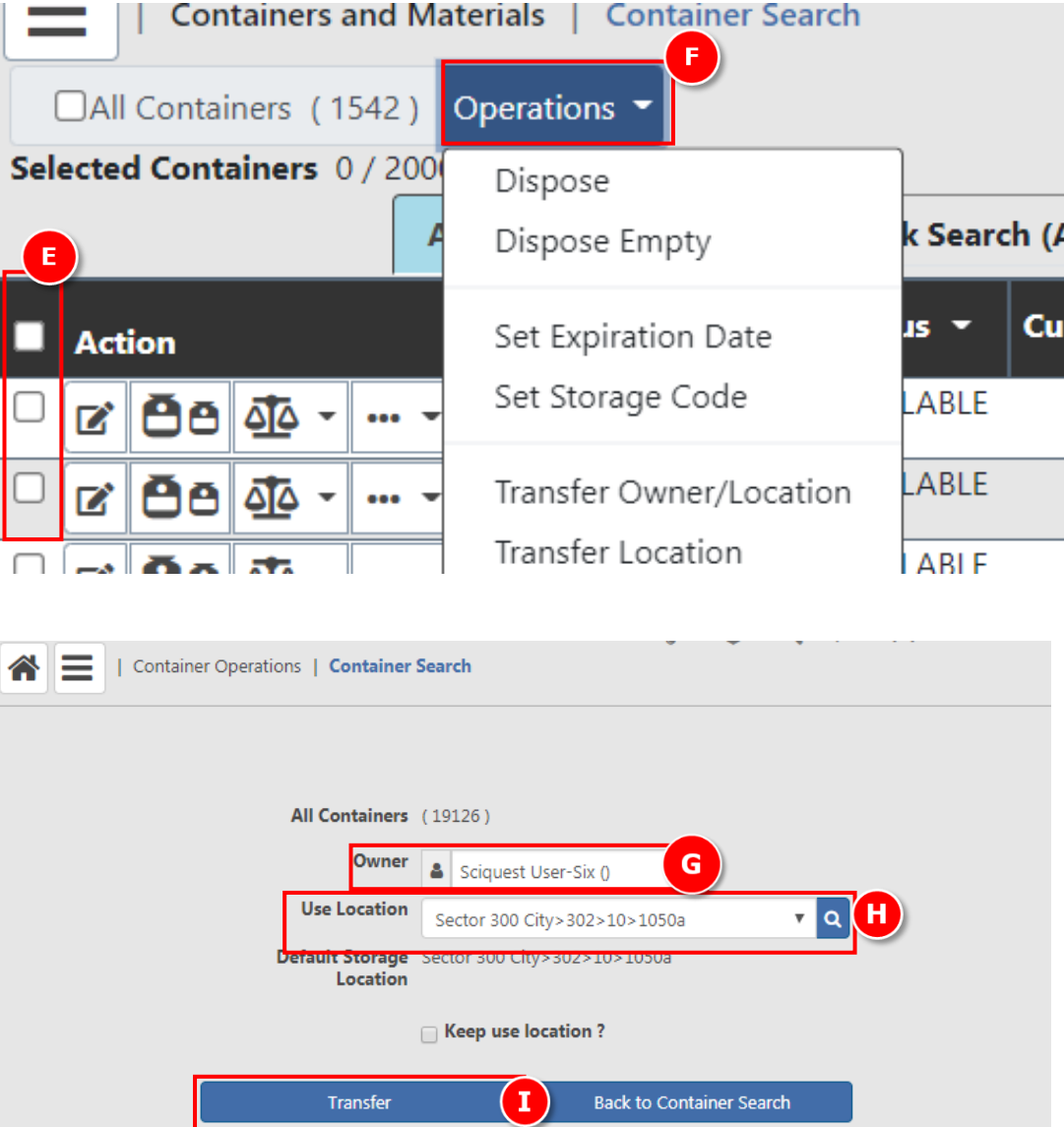
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4. Transferring items

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**.

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"