

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.

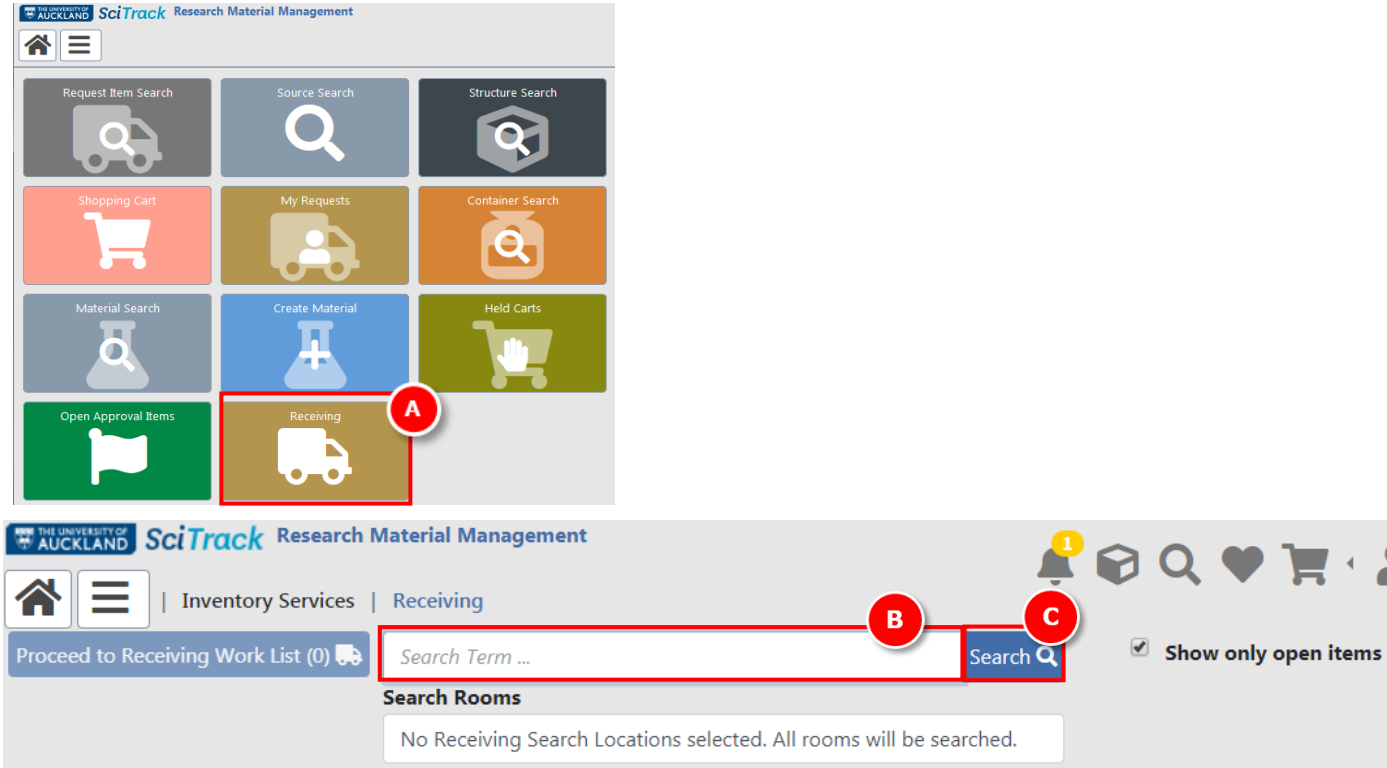
- **Receipting (aka receiving)** is sometimes completed in the inwards goods store. Otherwise items should be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP or requestor for all barcoded items.
- When an item is receipted in SciTrack, it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

1. Receipting part 1: Search for a purchase order

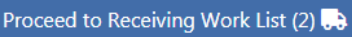
2. Receipting part 2: Select items to receive

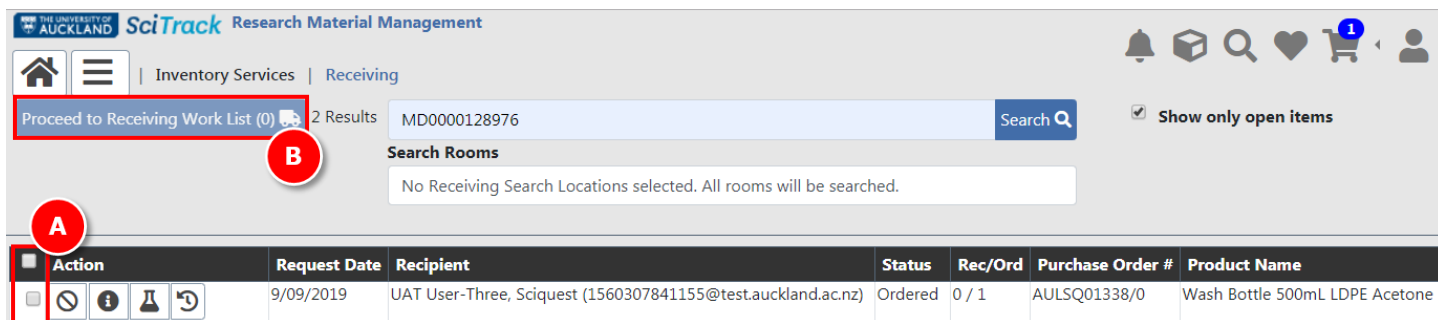
3. Receipting part 3: Review and receive an item

4. Transfer barcoded items

Steps	Screenshots
<p>1. Search for a purchase order</p> <p>A. Click Receiving.</p> <p>B. Enter P.O. number or cart name in the Search Term field.</p> <p>C. Click Search.</p> <p>Tip: 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 interface. The top navigation bar includes the University of Auckland logo and the SciTrack logo. Below the navigation bar is a grid of icons for various functions: 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' icon, which depicts a truck, is highlighted with a red box and a red circle containing the letter 'A'. Below this grid is a search interface with a 'Search Term' input field, a 'Search' button, and a 'Show only open items' checkbox. The search term field and the search button are highlighted with red boxes and labeled with 'B' and 'C' respectively. The search results area shows '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  Proceed to Receiving Work List (2) to add selected items to Work List.







SciTrack Research Material Management

Inventory Services | Receiving

Proceed to Receiving Work List (0)  2 Results MD0000128976 Search

Show only open items



Search Rooms
No Receiving Search Locations selected. All rooms will be searched.

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

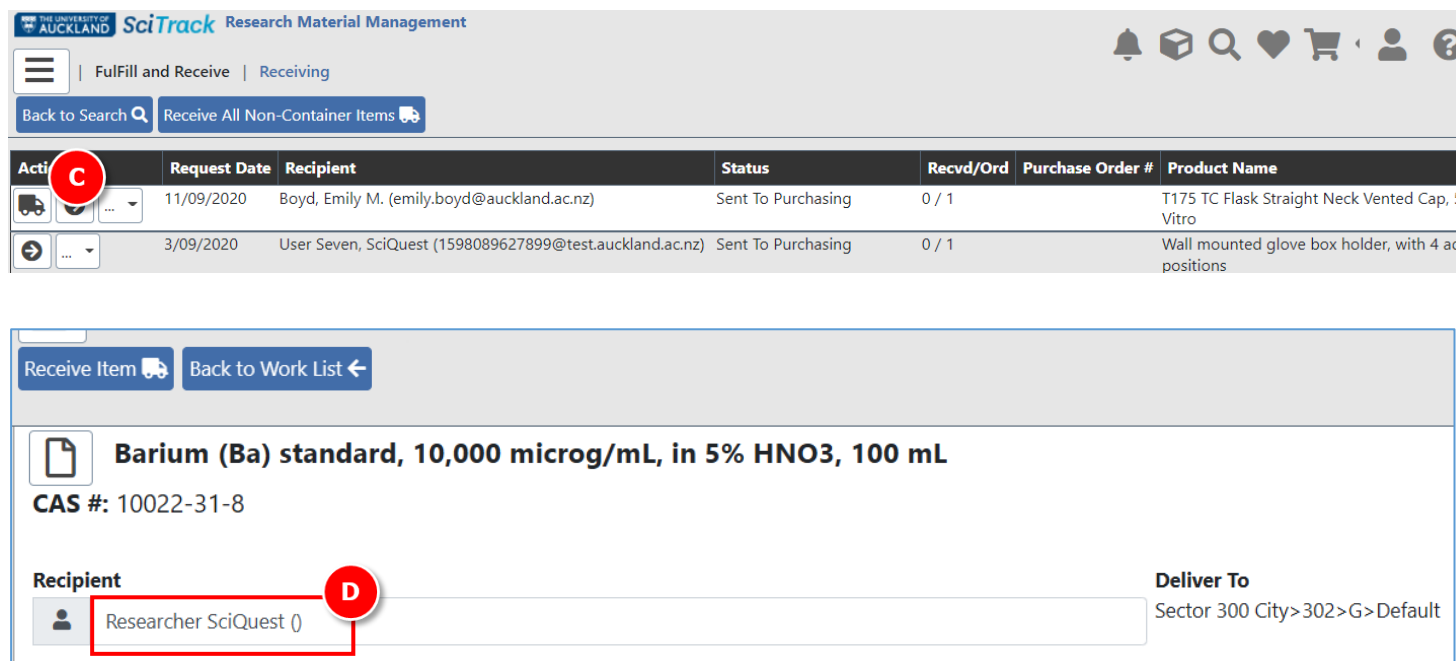
Note:

- 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.**)

3. Receive the selected items



- C. 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 continue to receiving.





- D. For items with barcodes that will create a container in SciTrack, you can change the owner here. Select the Recipient field, and type either the first or last name of the new owner.






SciTrack Research Material Management



FulFill and Receive | Receiving

Back to Search  Receive All Non-Container Items 

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

Receive Item  Back to Work List 

 **Barium (Ba) standard, 10,000 microg/mL, in 5% HNO3, 100 mL**
CAS #: 10022-31-8

Recipient  Researcher SciQuest () 

Deliver To
Sector 300 City>302>G>Default

Continued on next page...

- E. Change the **Quantity to Receive** value if you have received a partial order.
- F. 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:

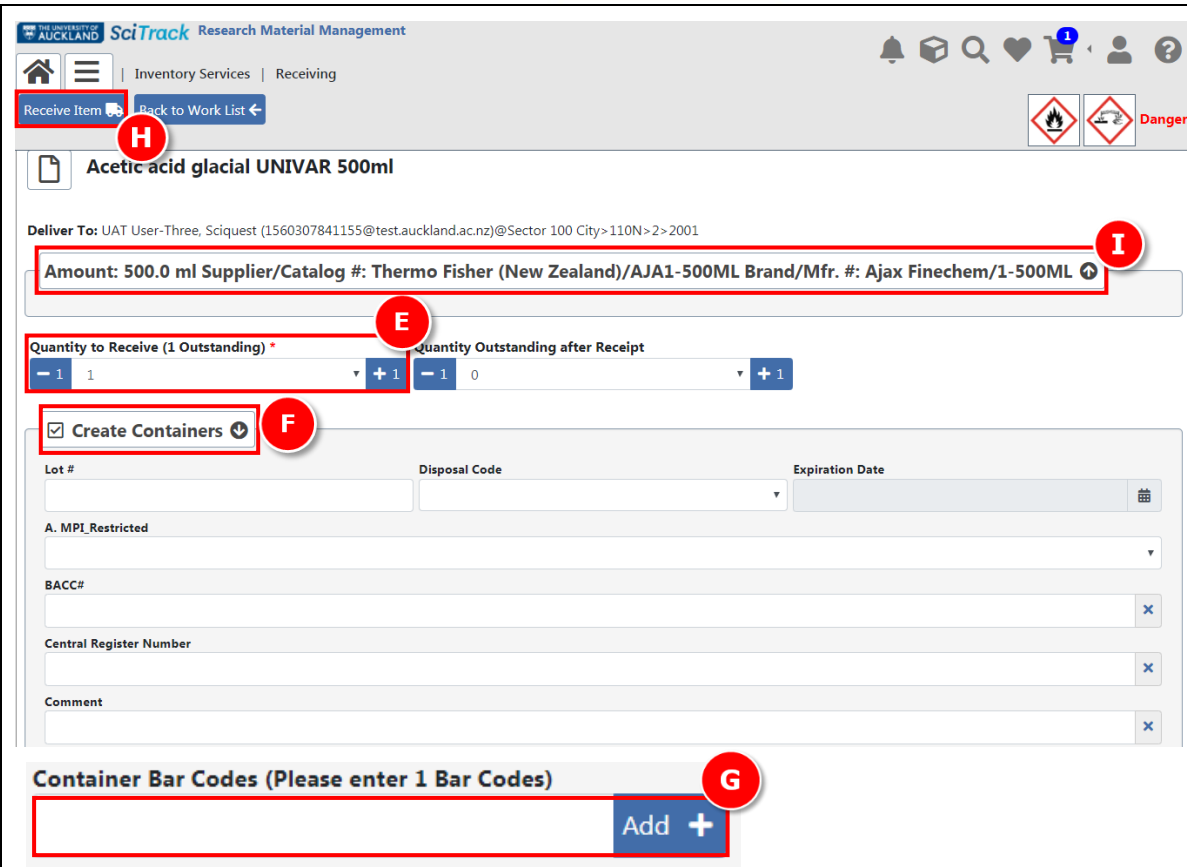
- Please make sure you only uncheck Create Containers (F) for non-hazardous items.
- Unchecking Create Containers on chemicals or restricted biologicals may breach the Health and Safety at Work Hazardous Substances Regulations, HSNO Regulations and the University Health, Safety and Wellbeing Policy.

G. Scroll to the bottom of the page to enter/scan the pre-printed barcode to be attached to the item. Click **Add +** after each bar code.

H. Click **Receive Item** to complete the receipt.

Note:

- Click Package Information button to open Package Information Details pane and edit if required (I). This lets you change the Lot Size which determines how many barcodes are asked for.



The screenshot shows the SciTrack interface for receiving an item. The item is 'Acetic acid glacial UNIVAR 500ml'. The 'Deliver To' field is populated with 'UAT User-Three, Sciqquest (1560307841155@test.auckland.ac.nz)@Sector 100 City> 110N> 2> 2001'. The 'Amount' is 500.0 ml. The 'Quantity to Receive' is set to 1. The 'Create Containers' checkbox is checked. The 'Container Bar Codes' section is empty, and the 'Add +' button is visible.

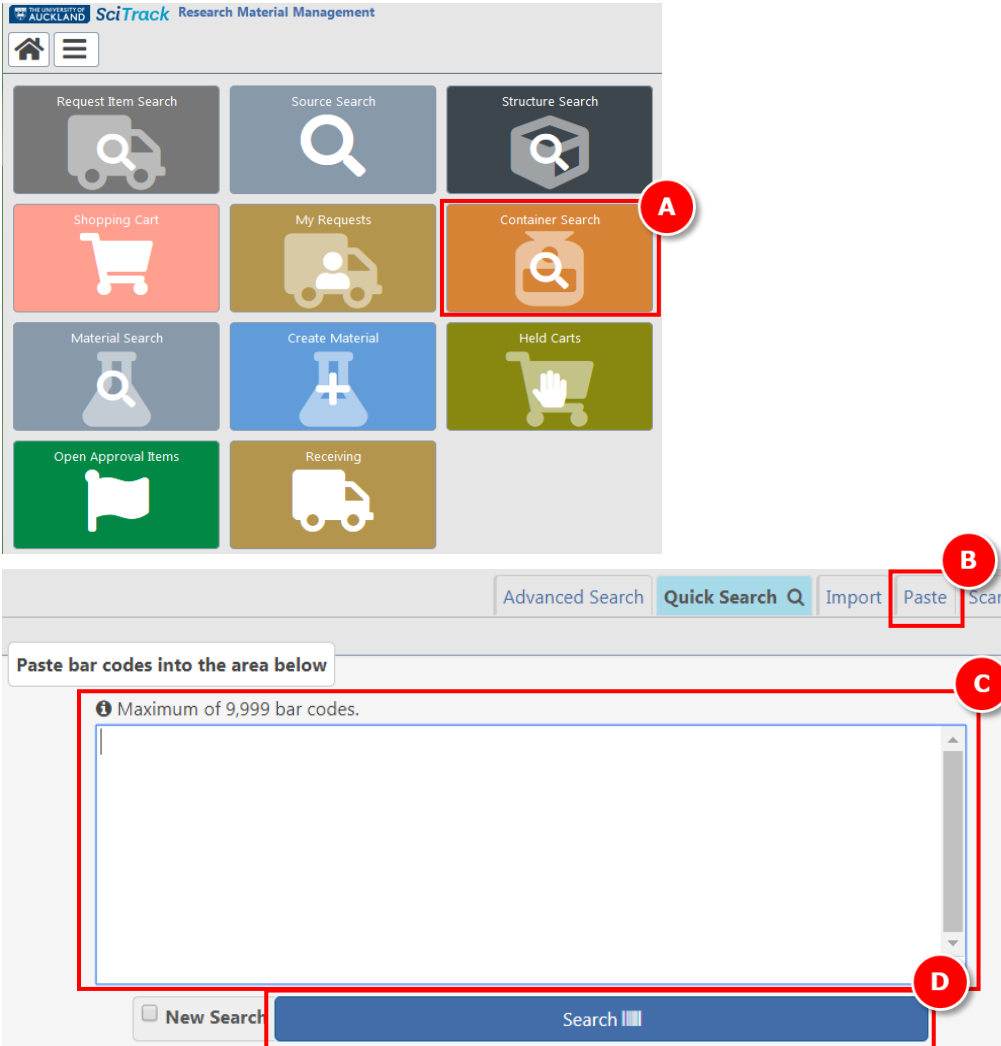
Receiving partial orders:

- 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 functional buttons: 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'. Underneath 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 'Search' (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**.

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"

