

SciQuest ERM Cheat Sheet – Reviewing Shopping Carts for DLPs

Saving the Shopping Cart and Reviewing

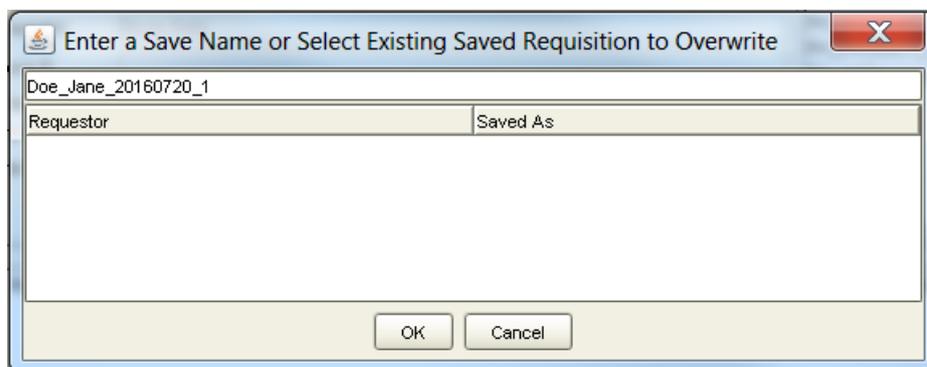
Once all the information is checked and correct, the Shopping Cart can be saved.

Saving the Shopping Cart

Click the **Save As** button.

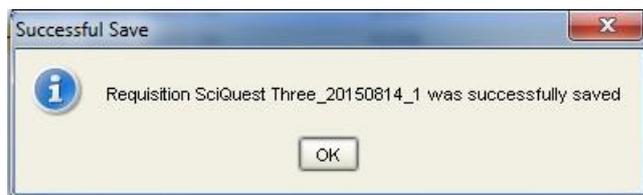


The dialogue window **Enter a Save Name or Select Existing Saved Requisitions to Overwrite** appears and prompt you to save and name your requisition.



Note: Name the Shopping Cart in the following format: **Requestor name_date_a number** (this distinguishes the Shopping Carts placed by the same Researcher on the same date)

Click **OK** and a dialogue window confirming your Shopping Cart has been successfully saved appears.



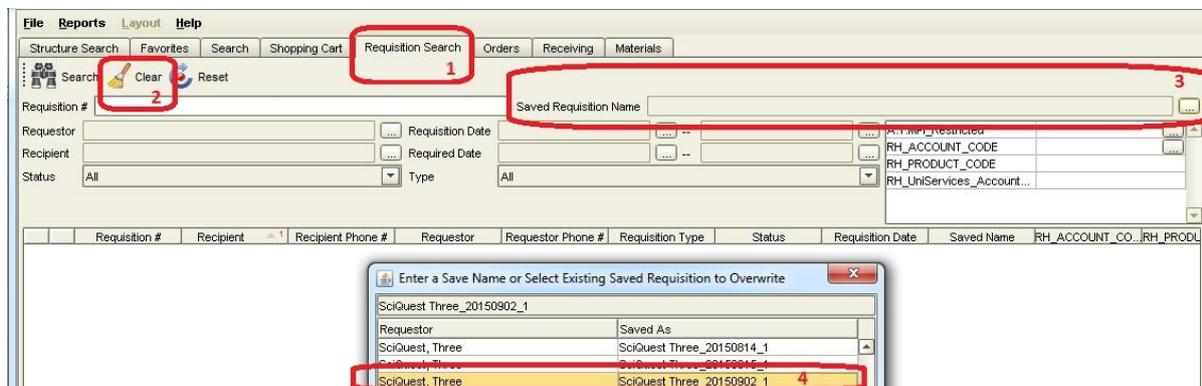
Click **OK** to continue.

The next step is to Review the cart.

Reviewing and Submitting Shopping Carts

Reviewing the Shopping Cart

After the Shopping Cart has been saved, it needs to be reviewed. You will do this for your own Shopping Carts, as well as for those sent to you by Researchers.

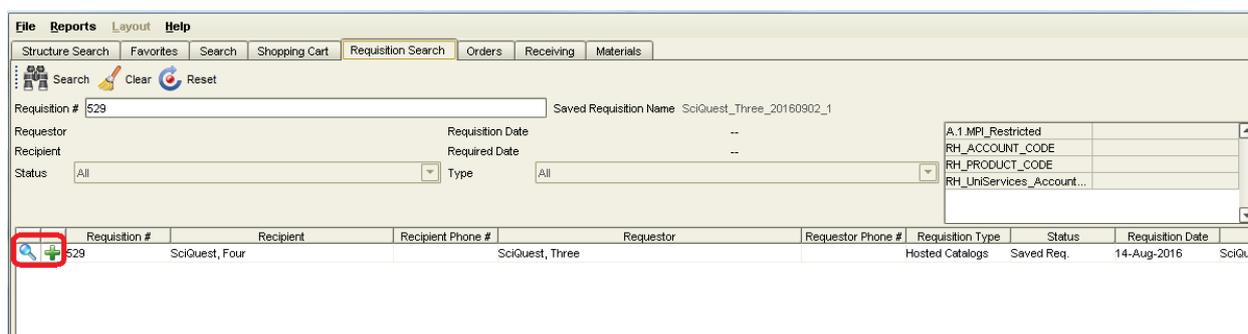


- Go to the **Requisition Search** tab
- Press the **Clear** button
- Click the ellipsis button  next to the “**Saved Requisition Name**” field
- Find the saved requisition and click **OK**.

The saved requisition will return in the result pane, with a requisition number.

To review shopping carts sent to you by Researchers, click the  button.

To review your own shopping cart, click the  button. If you need to make changes to your cart, click the  button.



When clicking the  button, any warnings that the Researcher saw when creating the cart will pop up again.

The shopping cart will then show up under the **Shopping cart** tab and you will have to check the following to ensure that accurate information is provided:

Under requisition header:

The screenshot shows the requisition header form with the following fields highlighted:

- 1**: Recipient Name (SciQuest, Three)
- 2**: Recipient Location (B061>5>301>UOA - City Campus)
- 2**: Select Cost Center (9448-UOA-PMAT747)
- 3**: Supplemental Information field A.1 MPI_Restricted (false)
- 4**: Supplemental Information field RH_UniServices_Account_Num...

- Recipient (will be the PI who is the owner of the requested item)
- Cost centre
- MPI restricted status (This field cannot be left blank! Either true or false has to be selected)
- UniServices account number (if applicable)

Under requisition line items:

The screenshot shows the requisition line item form with the following fields highlighted:

- 1**: Supplier (Sigma-Aldrich (New Zealand))
- 2**: Cost Center (9448-UOA-PMAT747)
- 3**: Supplemental Information field B.1 MPI_Restricted (false)

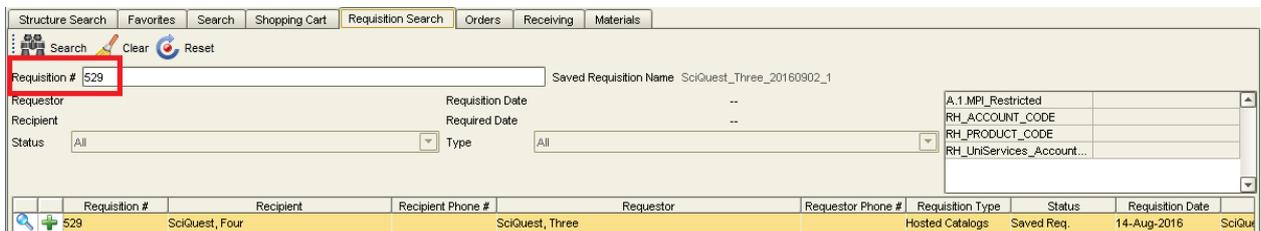
- Item information
- Cost centre is determined by the Requisition Header field value, so should not be different.
- Item’s hazardous and restricted status (It is compulsory to declared the item’s hazardous and restricted status if the requested item is:

- MPI restricted
- Controlled drugs
- Radioactive
- Toxic gas (UN 2.3)
- Highly reactive (UN 4.1 PG1, UN 4.2 PG1, UN 4.3 PG1)
- Highly toxic (UN 6.1 PG1)

If you clicked the  button to review your own cart, the requisition number remains the same. If you clicked the  button to review a Researcher’s cart (or to edit your own), you need to click Save As to save the shopping cart again and it will receive a new cart number. Find this new requisition number in the Requisition Search tab:

- Go to the **Requisition Search** tab
- Press the **Clear** button
- Click the ellipsis button  next to the “**Saved Requisition Name**” field
- Find the saved requisition and click **OK**.

The saved requisition will return in the result pane, with a requisition number.



The screenshot shows the 'Requisition Search' tab in a software interface. At the top, there are navigation tabs: Structure Search, Favorites, Search, Shopping Cart, Requisition Search (active), Orders, Receiving, and Materials. Below these are buttons for Search, Clear, and Reset. A search input field contains '529' and is highlighted with a red box. To the right, there is a 'Saved Requisition Name' field with the value 'SciQuest_Three_20160902_1'. Below the search area, there are fields for Requisition Date, Requisition Date, and Required Date, all set to '--'. There are also dropdown menus for Status (set to 'All') and Type (set to 'All'). On the right side, there is a list of filters: A.1 MPI Restricted, RH_ACCOUNT_CODE, RH_PRODUCT_CODE, and RH_UniServices_Account... At the bottom, there is a table with the following data:

Requisition #	Recipient	Recipient Phone #	Requestor	Requestor Phone #	Requisition Type	Status	Requisition Date
529	SciQuest, Four		SciQuest, Three		Hosted Catalogs	Saved Req.	14-Aug-2016