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AUCKLAND
Te Whare Wānanga o Tāmaki Makaurau
NEW ZEALAND

SciQuest ERM 8.1.1

Biologicals Manual

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1 Introduction

Welcome to the SciQuest Enterprise Reagent Manager (ERM). This is a cradle to grave purchasing and inventory system for materials including hazardous chemicals and risk biological materials. The SciQuest ERM system tracks and manages the full life cycle of material from point of purchase, transport, storage, use and disposal of hazardous and restricted materials.

1.1 The purpose of this document

This manual is for DLPs or Researchers who purchase and/or create biologicals and maintain records of these for regulatory purposes. It assumes familiarity with SciQuest ERM. For more detailed training information, please visit our webpage:

<https://www.auckland.ac.nz/en/students/academic-information/postgraduate-students/sciquest-erm.html>

1.2 Training

Training is divided into topics and you should view the topics in the order they are numbered.

1. Searching for Biologicals in your inventory
2. Creating and reviewing a Shopping Cart
3. Receiving purchased items
4. Receipting purchased items
5. Creating new biologicals
6. Viewing/Editing biologicals
7. Disposing of biologicals

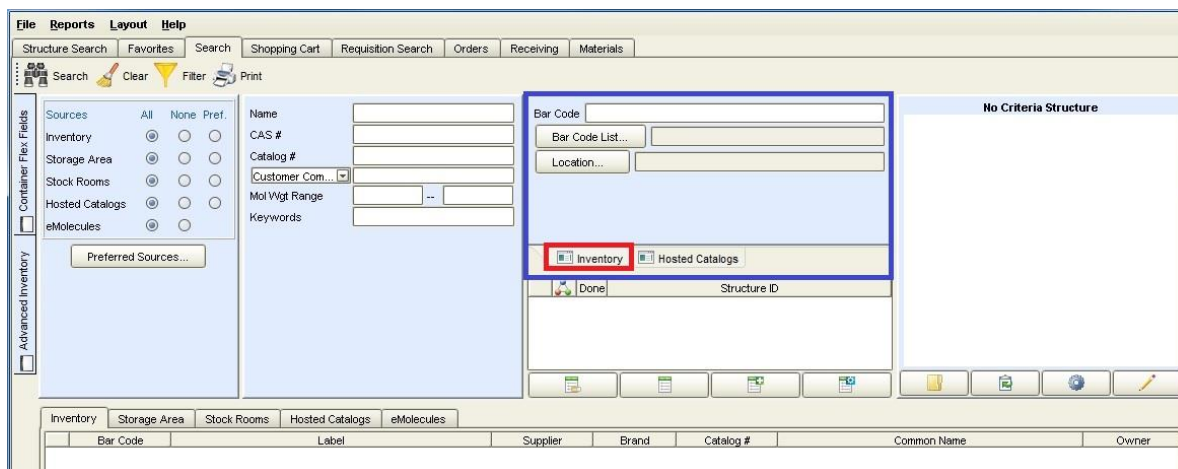
2 Searching

2.1 Searching for biologicals

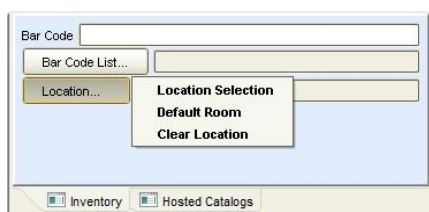
The best way to search for your biologicals is by location. Other options include searching by owner, barcode, or other regulatory information such as the Central Register Number.

2.1.1 Search by location -Inventory Tab

Searching by using a location narrows your search to a room or a sublocation (ie freezer) within a room. Click the Inventory tab in the centre of the Search screen.

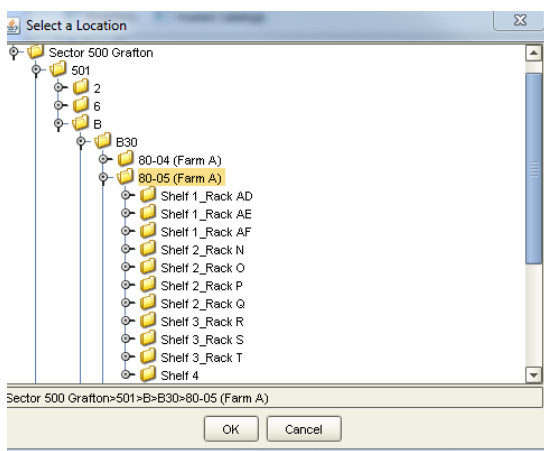


Click Location and select Location Selection. You may clear your selection by clicking Clear Location.



After choosing Location Selection, expand the location buttons until you get to the appropriate storage area you wish to search. You can choose a building, floor, room or sublocation to search. In the example we are searching -80 freezer 80-05. Select/highlight the freezer name and click OK.

You can drill down to the shelf, box or grid #. Your selected sublocation will then appear to the right of the Location button.



Select Inventory and/or Storage area for your source.

Click the search button and your results should appear in the result pane.

Click on the sublocation title to rearrange the items in descending order.

2.1.2 Search by barcode -Inventory Tab

You can search by Barcode or Barcode List using the Inventory function button. **Click** the Inventory tab in the centre of the Search screen. You may type an individual barcode into the free text field, or copy a list of barcodes from Excel and click Bar Code List to paste these in.

2.1.3 Search by owner - Advanced Inventory Tab

You can find all items owned by a PI by using the Advanced Inventory tab. **Click** the **Advanced Inventory** tab which will bring up the owner search option as well as other fields to search by.

The screenshot shows the 'Search' window with the 'Advanced Inventory' tab selected in the left sidebar. The main search area contains fields for Name, CAS #, Catalog #, Customer Com..., Mol Wgt Range, and Keywords. The 'Inventory' tab is selected in the center, showing a 'Bar Code' field and a 'Bar Code List...' button. The right sidebar shows 'No Criteria Structure'. The bottom of the window displays a table with columns: Label, Supplier, Brand, Catalog #, Common Name, and Owner.

2.1.4 Search by regulatory information – Container Flex Fields Tab

When searching for biologicals you can narrow your search using the **Container Flex Field** function.

The screenshot shows the 'Search' window with the 'Container Flex Fields' tab selected in the left sidebar. The main search area contains fields for Name, CAS #, Catalog #, Customer Com..., Mol Wgt Range, and Keywords. The 'Container Flex Fields' tab is selected in the center, showing a list of fields: A_MPL_Restricted, BACC#, Central Register, Comment, Document Repo..., Donor Species..., Host Organism..., Host Organism..., HSNO Approval #, Import Permit#, Insert DNA, Transfer Permit#, User/Creator, and Vector. The right sidebar shows 'No Criteria Structure'. The bottom of the window displays a table with columns: Label, Supplier, Brand, Catalog #, Common Name, and Owner.

Click the Container Flex Fields function and search using any of the following fields:

Search Field name	Description
MPI_Restricted	MPI restriction status marked either true or false
BACC#	Biosecurity Authority/Clearance Certificate (BACC) number
Central Register Number	The Central Register Number for restricted items
Document Repository ID#	Document repository identification number (if applicable)
Comment	Free text field
Donor Species DNA	Genetically modified organism (GMO), the insert donor species
Host Organism- Species	Species of the host organism
Host Organism- Subspecies	Subspecies of the host organism
HSNO Approval #	HSNO approval number
Import Permit #	MPI Import permit number
Insert DNA	GMO, description of insert
Transfer Permit #	MPI transfer permit
Vector	GMO, description of vector

2.1.5 Search for disposed items - Advanced Inventory Tab

If you want to find a record of disposed items, you search for items with a status of Disposed, Disposed Empty, or All (and filter the results to find the Disposed and Disposed Empty items).

In the Search tab, choose the Advanced Inventory tab. Choose a Status from the drop-down menu.

The screenshot shows the SciQuest ERM 8.1.1 Biologicals Manual search interface. The 'Advanced Inventory' tab is selected in the left sidebar. The main search area includes fields for Name, CAS #, Catalog #, Customer Com..., Mol Wgt Range, and Keywords. A 'Status' dropdown menu is set to 'AVAILABLE'. The bottom of the screen shows a table with columns: Label, Supplier, Brand, Catalog #, Common Name, and Owner.

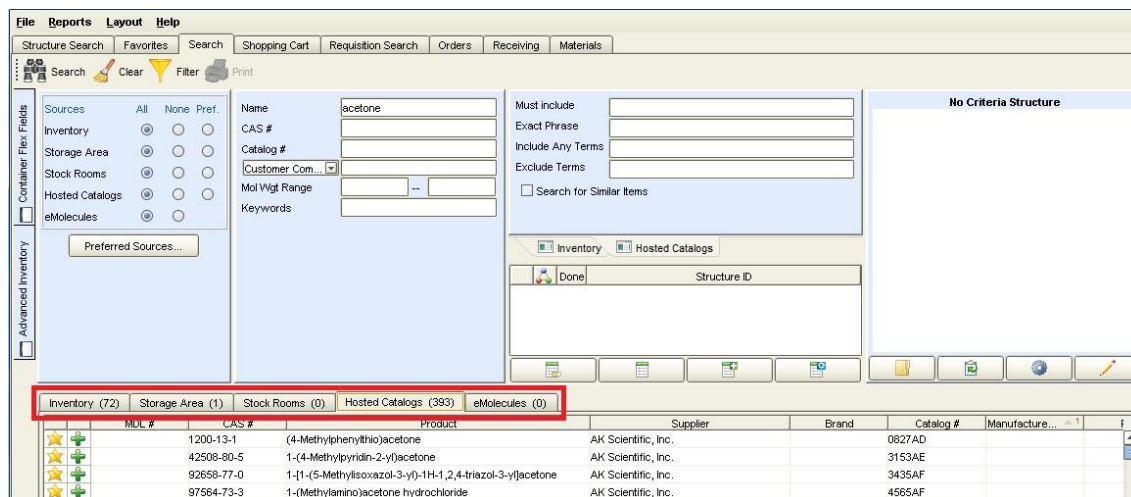
This search needs to be combined with other search criteria such as location, owner, or name.

2.2 Refining your searches using the result pane

Search results will be displayed on a set of 5 sub-tabs corresponding to the internal and external sources. The number of materials available in each source appears in the sub-tabs e.g. Inventory (1).

- **Refining your results**

You can further refine results by sorting or filtering columns.



- **Sorting columns**

Click on any column heading. The upward arrow will sort ascending. By clicking on the column heading again, the arrow will change to a downward arrow indicating the sort is descending. Clicking the column heading once again will remove the sort.

Unit	Price ▲ 1
20.00	Fishe
20.50	SIGM

- **Sort using multiple criteria**

To sort by multiple criteria, press and hold the Control key while you click the criteria in the order they are to be sorted. The number next to each of the selected columns indicates the sort order.

Unit	Price ▲ 1
20.00	Fishe
20.50	SIGM

Package Qty ▼ 2	L
1.0	L
1.0	mL

2.3 Exporting results to Excel

After performing a search you can export your results as a .csv file.

- 1) Select the lines you wish to export (or select all by holding CTRL-A, or right click and choose select all)
- 2) Right click and choose Copy Rows (Include headers)
- 3) Paste into an Excel spreadsheet

2.4 Using grid maps

Grid maps of various sizes have been designed for use with the SciQuest ERM inventory, and can be found on the SciQuest ERM website. The purpose of these is to quickly identify visually which grid positions are empty. To use a grid map you will need to perform a search for your items (best to search by location), and copy the sublocations and item names into the grid map tab.

Note: you must use the correctly sized grid map for accurate results.

To copy the data to paste into the grid maps, after performing a search you can either:

- export your results to Excel (as described above) and then copy the sublocations and item names into the Grid Map tab
- click and drag to select all of the sublocations and copy (Ctrl + C or right click and choose 'Copy Cell'). Then repeat for the Label column to get the item names. **Note: when dragging the selection box it can get 'stuck' before it reaches the bottom. Slowly move your mouse up and down once you get to the bottom to make sure you have reached the end of the list.**

	Sublocation	Expiration
13	80-02>Shelf-02_Rack-D>Box-17>Grid A10	
13	80-02>Shelf-02_Rack-D>Box-17>Grid A11	
13	80-02>Shelf-02_Rack-D>Box-17>Grid A12	
13	80-02>Shelf-02_Rack-D>Box-17>Grid A13	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I02	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I03	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I04	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I05	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I06	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I07	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I08	
13	80-02>Shelf-01_Rack-I>Box-12>Grid I09	
13	80-02>Shelf-01_Rack-I>Box-12>Grid G01	
13	80-02>Shelf-01_Rack-I>Box-12>Grid G02	
13	80-02>Shelf-01_Rack-I>Box-12>Grid G03	
13	80-02>Shelf-01_Rack-I>Box-12>Grid G04	
13	80-02>Shelf-01_Rack-I>Box-12>Grid G05	
13	80-02>Shelf-01_Rack-I>Box-12>Grid G06	

3 Shopping Cart Processes

When purchasing biologicals you need to be sure about the requirements for MPI restricted items. If you are not sure whether an item is restricted, please email containment@auckland.ac.nz for advice.

There are different Shopping processes when requesting items. A process exists for

- Hosted Catalogues and e-Molecules
- Non-Hosted Catalogues

The procedure for including mandatory regulatory information is the same for both types of orders.

3.1 Requisition Header

Information from the requisition header will apply to all the items in the same shopping cart unless it is changed at line item level.

Panel	Field Name	Description
Supplemental Information	MPI Restricted 	Indicate whether the requested item is MPI restricted. This field must be filled in. If all items are <u>not</u> MPI restricted Click the button and select false . If all items are not restricted, they do not need to be modified individually at the requisition line items level as long as the header says false. If some items are restricted, choose True.

3.2 Requisition Line Items

The requisition line items field displays the individual items being requested.

Ordered	CAS #	Catalog #	Product	Supplier	Package Qty	Package Unit	Price	Currency
1	647-14-5	793566-25KG	SODIUM CHLORIDE, ANHYDRO...	Sigma-Aldrich (Ne...	25.0KG		576.00NZD	
1	0816-12-0	75632-10ML	Osmium tetroxide solution, for el...	Sigma-Aldrich (Ne...	10.0ML		412.50NZD	

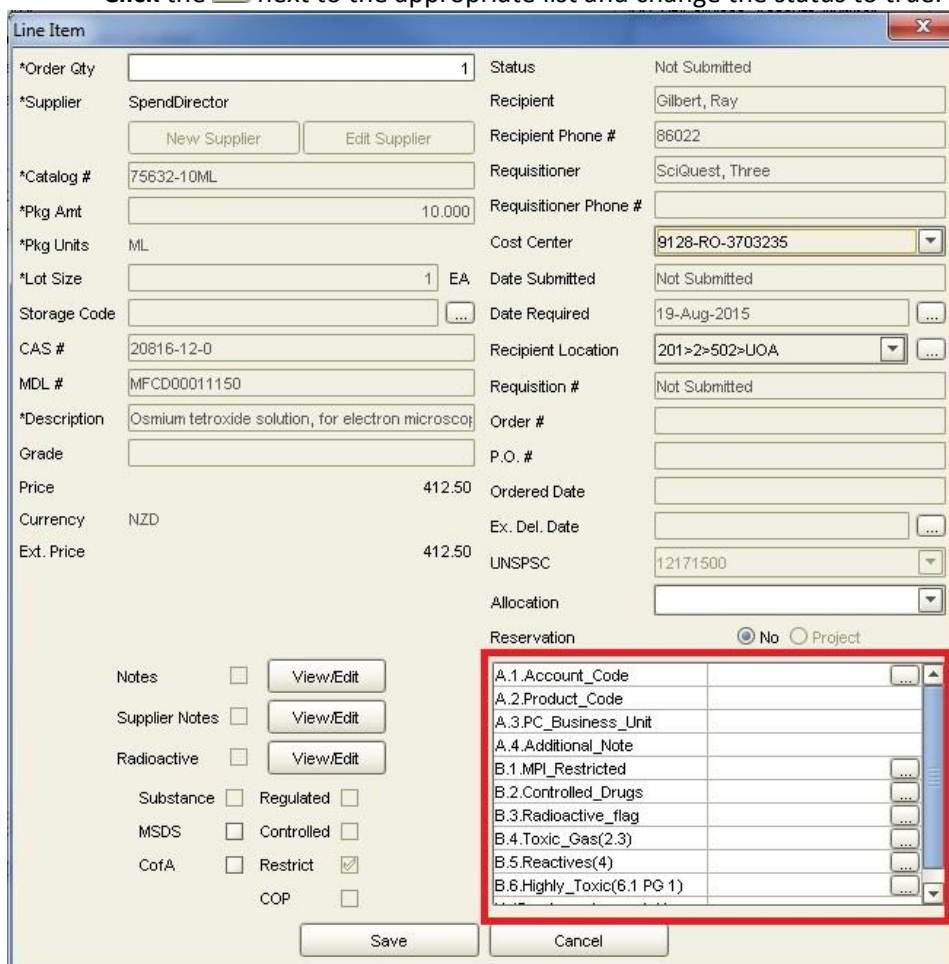
For Hosted Catalogue items, you can edit the line items by right-clicking the item and choosing **View/Edit Line item** or **Click** the pencil to open the line for editing.

For Non-Hosted Catalogue orders, the editing box opens when you choose “Add Item”.

It is compulsory to declare the item’s hazardous and restricted status if the requested item is one of the below.

- 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 (UN6.1 PG1)

- Click the  next to the appropriate list and change the status to true.



Line Item

*Order Qty: 1 Status: Not Submitted

*Supplier: SpendDirector Recipient: Gilbert, Ray

New Supplier Edit Supplier Recipient Phone #: 86022

*Catalog #: 75632-10ML Requisitioner: SciQuest, Three

*Pkg Amt: 10.000 Requisitioner Phone #:

*Pkg Units: ML Cost Center: 9128-RO-3703235

*Lot Size: 1 EA Date Submitted: Not Submitted

Storage Code: Date Required: 19-Aug-2015

CAS #: 20816-12-0 Recipient Location: 201>2>502>UOA

MDL #: MFCD00011150 Requisition #: Not Submitted

*Description: Osmium tetroxide solution, for electron microscop Order #:

Grade: P.O. #:

Price: 412.50 Ordered Date:

Currency: NZD Ex. Del. Date:

Ext. Price: 412.50 UNSPSC: 12171500

Allocation:

Reservation: ☒ No ☐ Project

Notes: ☐ View/Edit

Supplier Notes: ☐ View/Edit

Radioactive: ☐ View/Edit

Substance: ☐ Regulated ☐

MSDS: ☐ Controlled ☐

CofA: ☐ Restrict ☒


COP: ☐

Save Cancel

Press **Save** to return to the **Shopping Cart** tab.

3.3 Reviewing Shopping Carts sent to you by Researchers

If you have been sent a cart with MPI restricted items, please review it to ensure the correct regulatory information has been included.

- 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.

File Reports Layout Help

Structure Search Favorites Search Shopping Cart Requisition Search Orders Receiving Materials

Search Clear Reset

Requisition # 529 Saved Requisition Name SciQuest_Three_20160902_1

Requestor Requestion Date --

Recipient Required Date --

Status All Type All

A.1.MPI.Restricted
RH_ACCOUNT_CODE
RH_PRODUCT_CODE
RH_UniServices_Account...

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

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 should check that the MPI_Restricted fields have been selected correctly. Once you save the cart again it will have a new Requisition number.

3.4 Submitting the Shopping Cart

Remember to attach supporting documentation such as MPI import permit (where required)

4 Receiving

Biological items that you have ordered through SciQuest ERM will need to be **Received** into SciQuest ERM.

4.1 Receiving an item

To Receive items go to **Receiving** tab.

File Reports Layout Help

Structure Search Favorites Search Shopping Cart Requisition Search Orders Receiving Materials

Search Clear Receive Item Cancel Close

P.O./Requisition # EX0000014158 1 Alerts

Recipient/Requestor

Receiving Room

Vendor/Brand

Catalog #

CAS #

Line Item Status ☒ Open Items ☐ All Items

Health & Safety/COP more...

Notes

Description Cyanogen bromide, reagent grad

Qty Ordered 1

*Qty Received 1

*Pkg Amount 25

*Pkg Units G

*Lot Amount 1

*Outstanding Qty 1

Status Ordered

Identifier Value

Catalog # C91492-25G

Vendor Sigma-Aldrich (New)

Brand SIGMA-ALDRICH

Mfg Part # C91492

Expiration Date

Lot #

Storage Code

Purity 97.0000%

A. MPI_Restricted

BACC#

Document Repository...

Donor Species DNA

Host Organism - Spe...

Host Organism - Sub...

PO #	Line #	Requisition #	Line Status	Order #	Requisition Date	Ordered	Cost Center	CAS #	Catalog #	Description
EX0000014158	1	815 Ordered	943	13-Jul-2015	12429	506-68-3	C91492-25G	Cyanogen bromide...		
EX0000014158	2	815 Ordered	943	13-Jul-2015	12429	7786-30-3	68475-100ML-F	Magnesium chlorid...		

- 1) Search for the item by entering the PO number in the **P.O./Requisition** field (1). Note that for T1 orders (UniServices purchasing system), PO numbers have different versions depending on the status. When receiving a Uniservices order you should add a wild card to ensure the order version is found, for example, **AULSQ00016***.

- 2) Items that match the search criteria will be displayed in the result pane (2). A highlighted row indicates that the item has one or more alerts or is associated with a note. Select the item to be received.
- 3) Verify that the description and amount matches what you have received (3a). Click the Receive Item icon.

Please see the DLP manual for more details about receiving.

Advanced Note:

To save yourself a step later, you can enter the regulatory information for the container into the Identifier pane (3b) before receiving the item. This has the same outcome as following Step 2 in the Receipting process.

After receiving, items with barcodes must be receipted into SciQuest ERM by the DLP into their final location. Please refer to Section 5 Receipting.

5 Receipting

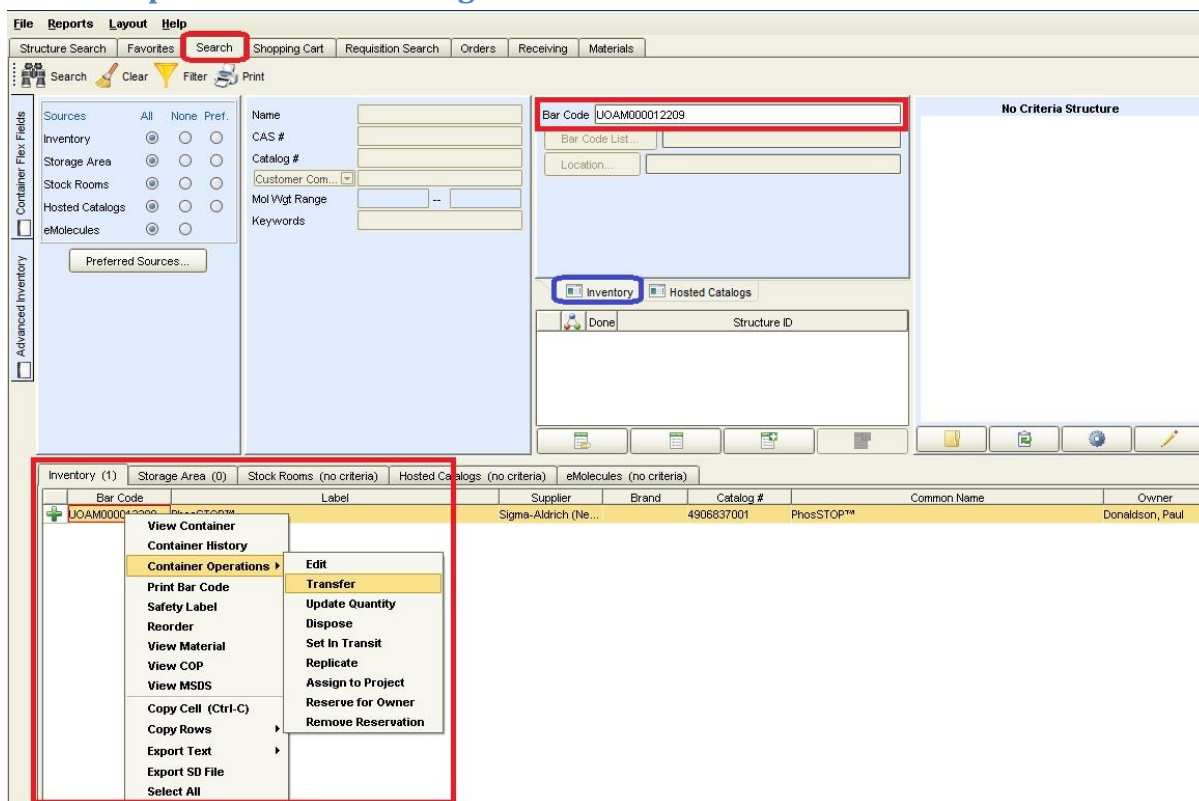
Receipting biologicals is a three-step process that must be performed by the DLP after receiving the items.

Step 1 is when the DLP transfers received barcoded items into their actual storage location, and chooses the PI as the owner.

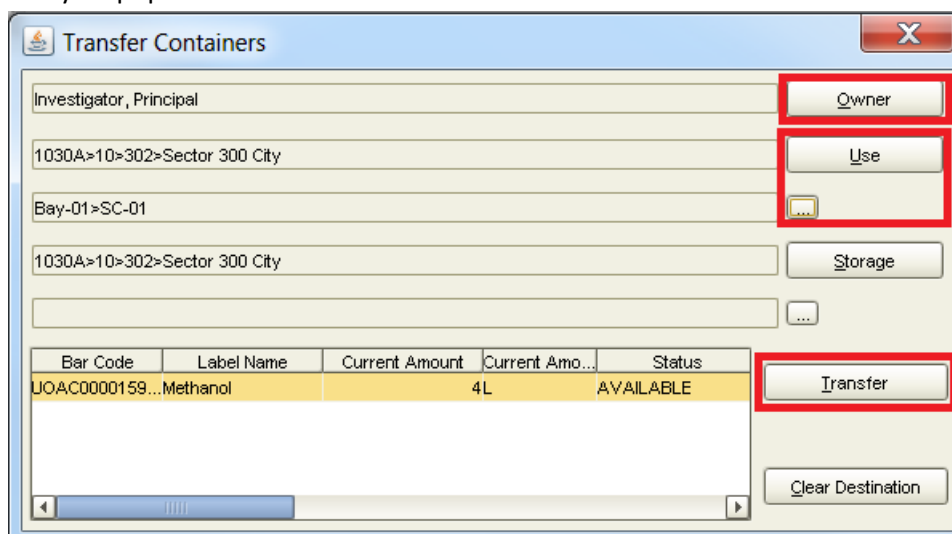
Step 2 is to edit the container to add further information regarding the regulation of the biological.

Step 3 is to edit the material to add a Customer Compound ID of **GMO** or **RB**, which identifies the item as restricted.


5.1 Step 1: Transfer to storage location and select the PI



- Go to the **Search** tab. Search for the item by **barcode** in the **inventory** tab.
- **Right Click** the selected container in the result pane.
- **Select Container Operations**, then **Transfer**. The default location of the current user will automatically be populated.



- Change the owner of the container **to the Principal Investigator who will be the responsible owner of the container**. Press the **Owner** button, find the new owner by his/her last name, select the new owner. The new owner's default location will be automatically populated.

- Change the location. Press the **Use** button and change the location (Sublocations can be found by pressing the ellipsis icon  underneath, after the room location has been selected). **The Storage location will auto update to the Use location and sublocation automatically once you click Transfer, as long as you don't touch the Storage button.**
- Press the **Transfer** button to confirm the transfer.

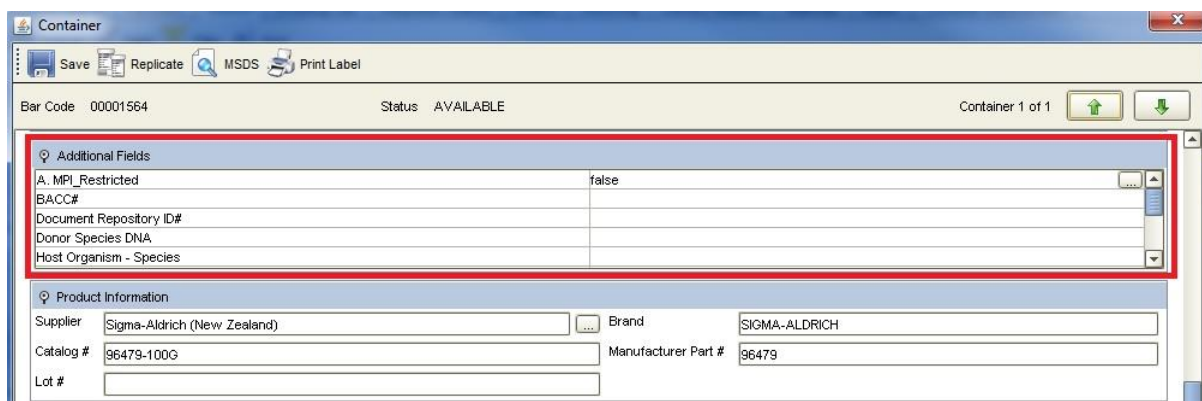
5.2 Step 2: Enter regulatory information

For MPI restricted items, it is compulsory to enter the following information into SciQuest ERM (where applicable):

- MPI restricted status (true)
- BACC#
- Central Register number
- Donor species DNA (insert donor species) (only for GMO)
- Host organism – species (only for GMO)
- Host organism – subspecies (only for GMO)
- HSNO approval # (for GMO and competent cells)
- Import permit number
- Insert (only for GMO)
- Transfer permit # (this can be obtained from the lab manager/technical team leader)
- Vector (only for GMO)

To input the above information:

- Right click the selected container in the result pane
- Select **Container Operations**, then **Edit**
- Enter the information under the **Additional Fields** table



The screenshot shows the 'Container' window in SciQuest ERM. The window has a title bar 'Container' and a menu bar with 'Save', 'Replicate', 'MSDS', and 'Print Label'. Below the menu bar, there is a status bar showing 'Bar Code 00001564', 'Status AVAILABLE', and 'Container 1 of 1'. The main area is divided into two sections: 'Additional Fields' and 'Product Information'. The 'Additional Fields' section contains a table with the following data:

Field Name	Value
A. MPI_Restricted	false
BACC#	
Document Repository ID#	
Donor Species DNA	
Host Organism - Species	

The 'Product Information' section contains the following data:


Supplier	Sigma-Aldrich (New Zealand)	Brand	SIGMA-ALDRICH
Catalog #	96479-100G	Manufacturer Part #	96479
Lot #			

Alternatively, this step can be performed at the time of receiving (see advanced note in section 4.1)

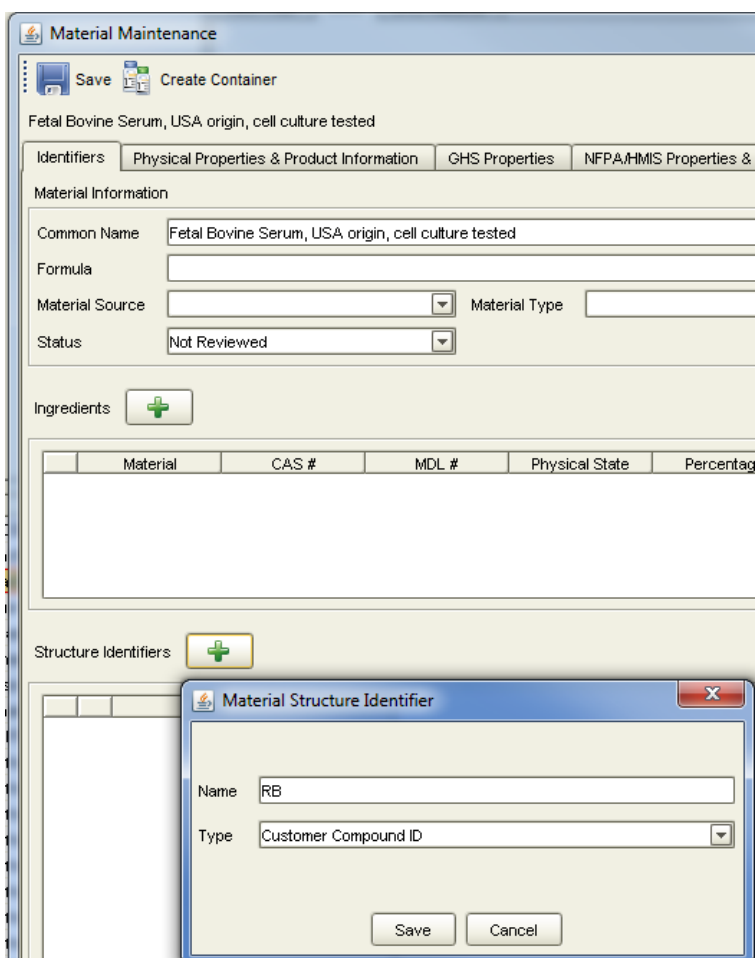
5.3 Step 3: Identify the material as GMO or RB

In the Materials tab, search for the material (see Section 6.1). The easiest way is to copy and paste the common name. Alternatively use wildcards (*) to find your material, ie *fetal*bovine*.

Right-click the material and select Edit Material.

Select the  icon next to "Structure Identifiers. Select "Customer Compound ID" in the Type field and enter "GMO" (for genetically-modified organism) or "RB" (for restricted biological) in the Name field. Press Save.

Click the Save button at the top to save the material.



The screenshot shows the "Material Maintenance" window with the "Material Information" tab selected. The "Common Name" field contains "Fetal Bovine Serum, USA origin, cell culture tested". The "Material Source" and "Material Type" fields are empty. The "Status" field is set to "Not Reviewed". Below the "Material Information" tab is a table with columns: Material, CAS #, MDL #, Physical State, and Percentag. Below the table is a "Structure Identifiers" section with a plus icon. A "Material Structure Identifier" dialog box is open, showing the "Name" field with "RB" and the "Type" field with "Customer Compound ID". The dialog box has "Save" and "Cancel" buttons.

Material	CAS #	MDL #	Physical State	Percentag
----------	-------	-------	----------------	-----------

6 Creating New Biologicals

The process for creating new biologicals is:

- 1) Search for the material name in the Materials Tab. If it does not exist, create a new material. (see section 6.2)
- 2) Create a new container based on that material (see section 6.3)

To add biologicals in bulk (~20 or more items at once):

You may fill out a bulk upload template and email it to sciquest@auckland.ac.nz. The template can be found on the SciQuest ERM website, and instructions are included in the file.

To replicate a container for a series of related biologicals (ie when freezing down a cell line):

- 1) Search for the container to replicate in the Search tab, and replicate it (see section 6.4)
- 2) Search for each of the barcodes of the new containers you have made, in the Search tab. Edit each container to select the correct sublocation (see section 7.1)

To add new sublocations to your freezer/dewar:

Email SciQuest@auckland.ac.nz with the details of the sublocations you need to have created.

6.1 Searching for materials

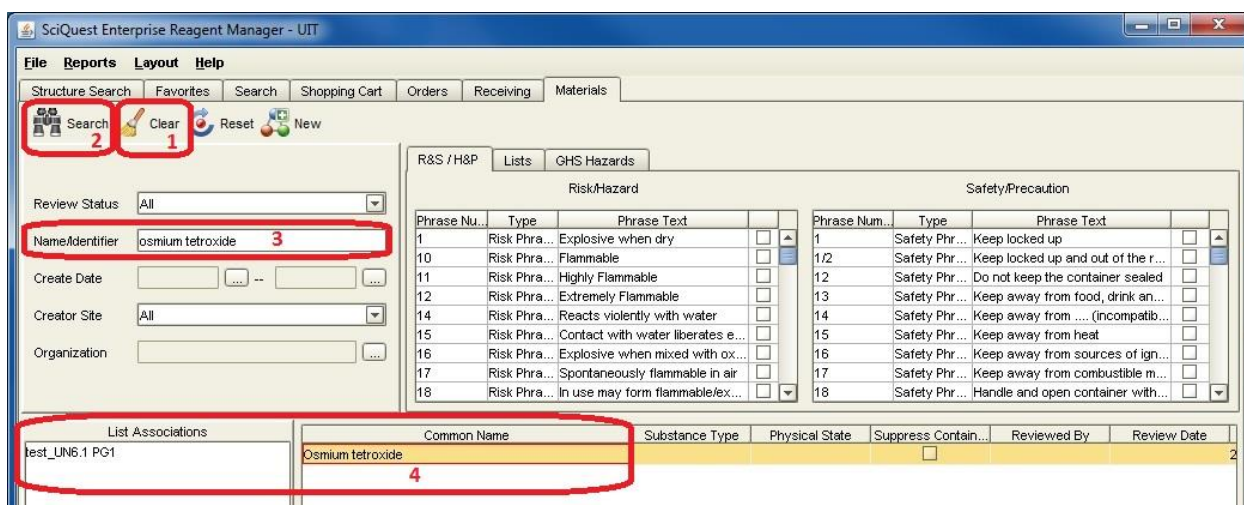
Search for materials using the **Materials Tab**

Begin your search by **Clicking** the **Clear** button  to re-set the search to the default criteria.

Enter your text with wildcards in the Name/Identifier field. It helps to search with wildcards around key words, for example, *e*coli*plasmid*

Click the **Search** icon  to get your results which are displayed in the Search Results pane.

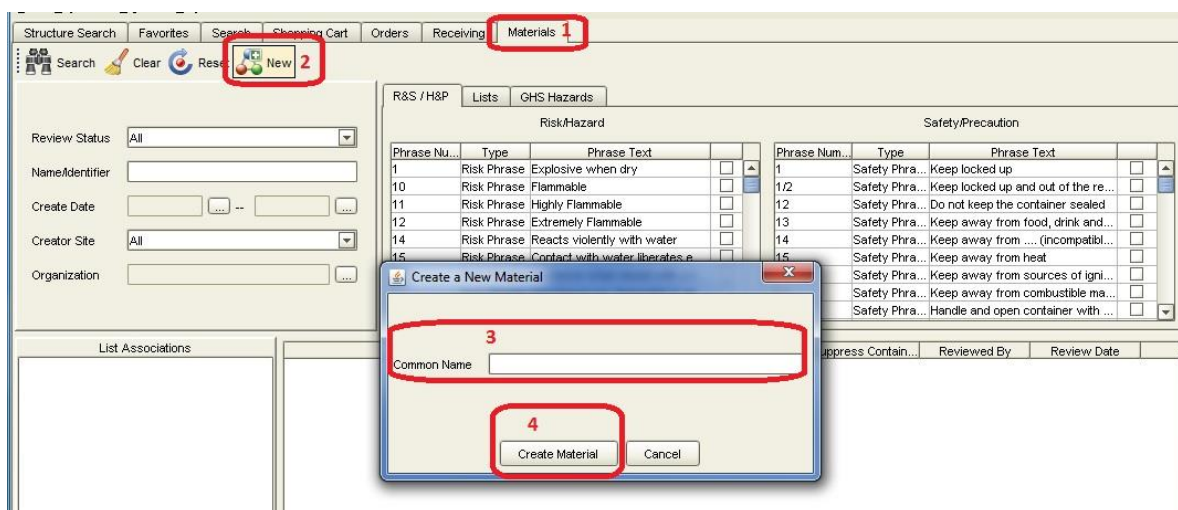
Selecting any individual material populates the List Associations pane (if any lists are associated with the material). This includes the GMO and RB lists.




Tip: To make a container of the material you have found, right click it and choose **Create Container**.


6.2 Creating a new material

You may create a new material when you create a new biological. To create new materials go to the **Material** tab. Make sure the material has not already been created by searching with wildcards (*) in the Name/Identifier field.

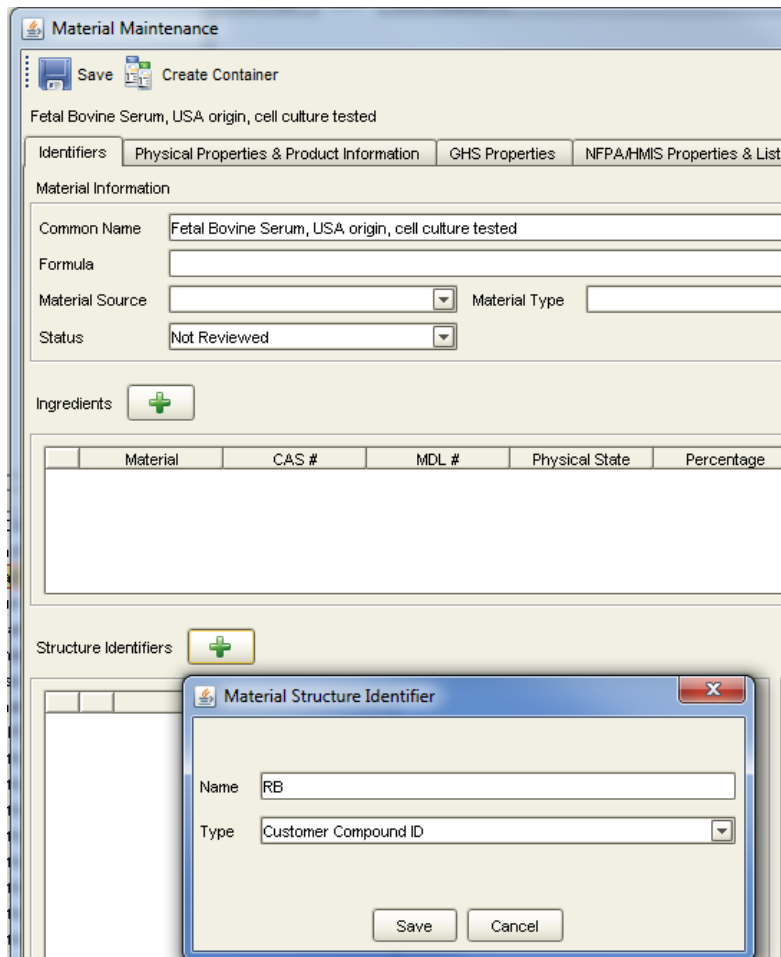


- Click the **New** substance icon  to open the **Create a New Material** dialogue window
- Enter a material common name.
- Click the **Create material** button which opens the **Material Maintenance** dialogue window. This is where you can enter information of the new material.

When creating a new genetically-modified organism (GMO) or restricted biological (RB), add the following steps before saving:

Select the  icon next to “Structure Identifiers. Select “Customer Compound ID” in the Type field and enter “GMO” (for genetically-modified organism) or “RB” (for restricted biological) in the Name field. Press Save. Once the material is created, a container of this material should be created.

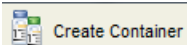
Click the **Save** button to save the material.



The screenshot shows the 'Material Maintenance' window. At the top, there are tabs for 'Identifiers', 'Physical Properties & Product Information', 'GHS Properties', and 'NFPA/HMIS Properties & List'. The 'Identifiers' tab is active. Below the tabs, there is a 'Material Information' section with fields for 'Common Name' (Fetal Bovine Serum, USA origin, cell culture tested), 'Formula', 'Material Source' (a dropdown menu), 'Material Type' (a dropdown menu), and 'Status' (Not Reviewed). Below this is an 'Ingredients' section with a plus icon. At the bottom, there is a 'Structure Identifiers' section with a plus icon. A dialog box titled 'Material Structure Identifier' is open over the 'Structure Identifiers' section. It has a 'Name' field with 'RB' and a 'Type' dropdown menu with 'Customer Compound ID' selected. There are 'Save' and 'Cancel' buttons at the bottom of the dialog box.

Material	CAS #	MDL #	Physical State	Percentage
----------	-------	-------	----------------	------------

Tip: To make a container of the material right away, you can click the Create Container button

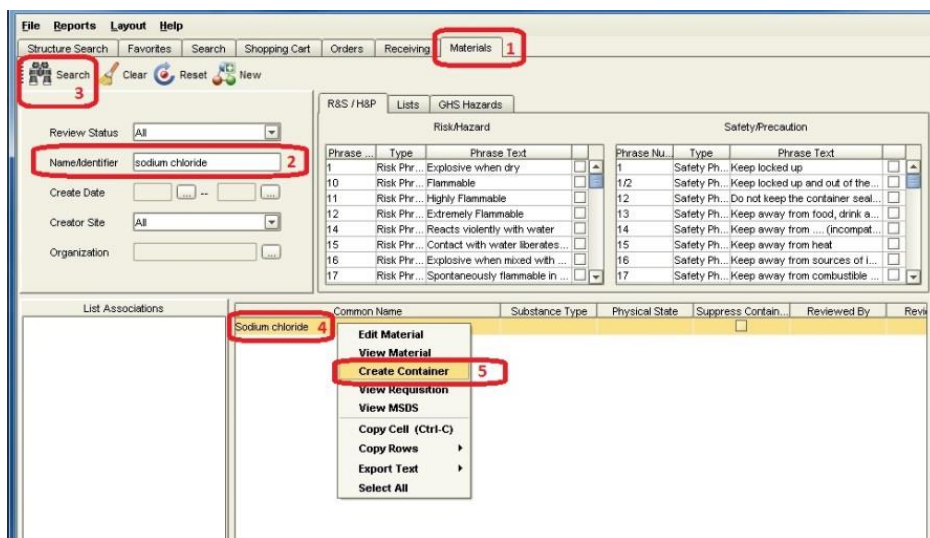


6.3 Creating a new container

To create a new container of an existing material, go to the **Materials** tab and find your material by searching (see section 6.1)

Right Click the selected material in the result pane

Select the “Create Container” option



A **Container** dialogue window appears.

Complete the container information. It is compulsory to change the owner to the **Principal Investigator** who will be the responsible owner of the container. Locations of containers are also required.

Fill out the required fields, paying particular attention to:

- **Owner** (click the ellipsis and type in the owner's last name)
- **Location** (click the ellipsis and choose the desired sublocation)
- **Additional Fields** (scroll down to see all the available descriptors)

Container

Save MSDS

Bar Code: Status: AVAILABLE

General

*Label Name: Biological

*Current Amt: [] [v]

*Original Amt: []

Tare: []

Gross: [] G [v] []

Purity: []

Disposal: []

Product Description: []

Owner: Boyd, Emily

Phone: []

Email: emily.boyd@auckland.ac.nz

Site: Sector 500 Grafton

Building: 529

Room: G43

Organization: The University of Auckland

Structure Identifiers

RB

Additional Names

Common Name: Biological

Synonyms: []

Locations

Dates

Opened: [] Expiration: [] Disposed: []

Site Acquired: 08-Nov-2016 Room Acquired: 08-Nov-2016 Created: 08-Nov-2016

Last Inventoried: [] Last Test: [] Next Test: []

Additional Fields

A. MPI_Restricted: []

BACC#: []

Central Register Number: []

Comment: []

Document Repository ID#: []

Product Information

*Supplier: [] Brand: []

Catalog #: [] Manufacturer Part #: []

Lot #: []

For MPI restricted items, it is compulsory to enter the following information into SciQuest ERM (where applicable):

- MPI restricted status (true)
- BACC#
- Central Register Number
- Donor species DNA (insert donor species) (only for GMO)
- Host organism – species (only for GMO)
- Host organism – subspecies (only for GMO)
- HSNO approval # (for GMO and competent cells)
- Import permit number
- Insert (only for GMO)

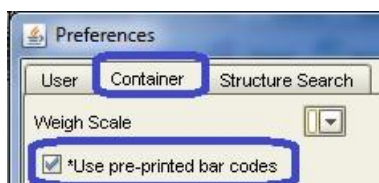
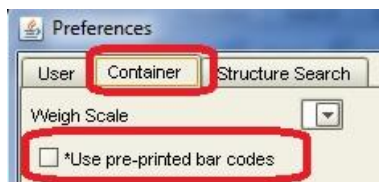
- Transfer permit # (this can be obtained from the lab manager/technical team leader)
- Vector (only for GMO)

Note: For Supplier, Select “**UOA created**” if the material is newly created in the University of Auckland, or “**Non-Commercial Collaborator**” for items that have been transferred or imported from other sources but not purchased.

6.3.1 Barcodes for biologicals

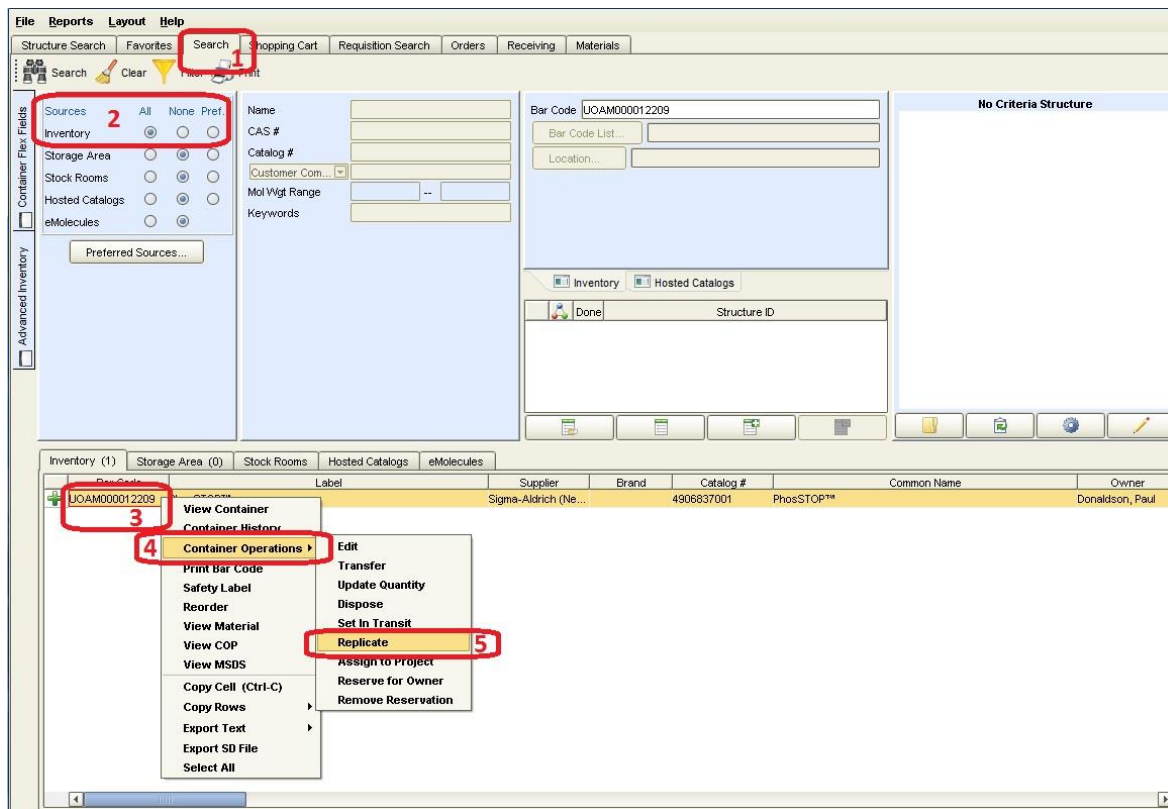
Please use pre-printed barcodes where possible. Options include cold-resistant barcodes, microtube labels, or Nunc® tubes with etched barcodes. These are available from your Stockroom.

Depending on your preference settings, either SciQuest ERM automatically generates a virtual barcode number for the new container (circled in red in the following screenshots) or you can scan/enter a pre-printed barcode (circled in blue in the following screenshots).



6.4 Replicating an existing container

- Go to the **Search** tab and Search for the container.
- **Right Click** the selected container in the result pane.
- Select **Container Operations** and Select **Replicate**.



A **Replicate** dialogue window appears.

Enter the number of containers to create. Check the **Copy Dates from Original Container** box if preferred.



Depending on your preference setting, SciQuest ERM either automatically generates a BarCode(s) for the new container(s) or allows you to scan/enter pre-printed Barcode(s).

The location of the new containers needs to be changed individually. Search for each of the barcodes of the new containers you have made, in the Search tab. Use Container Transfer to change the sublocation (see section 7.2).

7 Editing Biologicals

7.1 Editing a container

- To edit the **owner** or the **location** of a container please see section 7.2, Transferring a Container.
- To add a **Restricted tick** for a container, you need to edit the material by adding GMO or RB. Please see the instructions in section 5.3 (Step 3: Identify the material as GMO or RB).
- To edit the **barcode** please contact sciquest@auckland.ac.nz

To edit something else in the container:

- Go to the **Search** tab. Search for the container.
- **Right Click** the selected container in the result pane.
- Select **Container Operations**, then **Edit**

For more information on how to fill out the container details please see section 6.3.

7.2 Transferring a container


- 1) Go to the **Search** tab. Search for the container.
- 2) **Right Click** the selected container in the result pane.
- 3) Select **Container Operations**, then **Transfer**.

Note: When you open this tab, the Owner defaults to the logged-in user. Please check that the correct Owner and Use location are showing before clicking Transfer.

Bar Code	Label Name	Current A...	Current Amount Units	Status
TESTBIOTI...	TEST E.Coli	1 VIAL	AVAILABLE	

Reminder: Only a Principal Investigator may be a container owner.

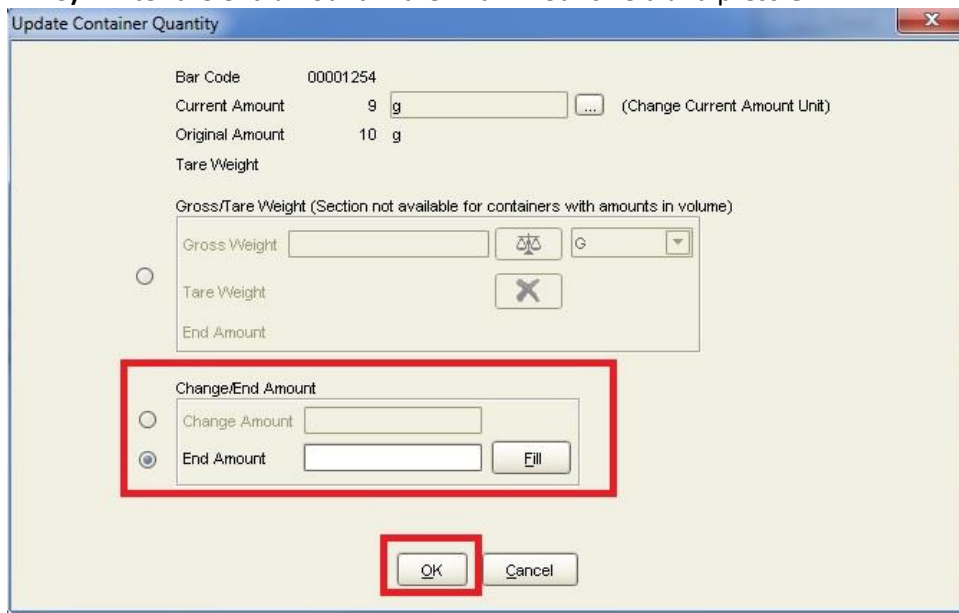
- 4) **Select the Owner** by clicking the **Owner** button. Find the Owner using their last name and choose Okay. The owner's default location is automatically populated.
- 5) **Choose the Location** by clicking the **Use** button and selecting the room. Click OK

- 6) **Choose the Sublocation** by clicking the  button to select a sublocation. Note that the “Storage” location will auto-update to match the “Use location” if you don’t touch it.
- 7) Press the **Transfer** button to confirm the transfer.

The transfer of ownership and location is recorded and can be checked under **Container History**

7.3 Updating the quantity of material in a container

- 1) Go to the **Search** tab. Search for the container of interest (as outlined in section 2).
- 2) **Right Click** the selected container in the result pane and Select **View Container**, then **Update Quantity**.
- 3) Enter the end amount in the **End Amount** field and press **OK**.



Update Container Quantity

Bar Code 00001254

Current Amount 9 g (Change Current Amount Unit)

Original Amount 10 g

Tare Weight

Gross/Tare Weight (Section not available for containers with amounts in volume)

Gross Weight Tare Weight End Amount

Change/End Amount

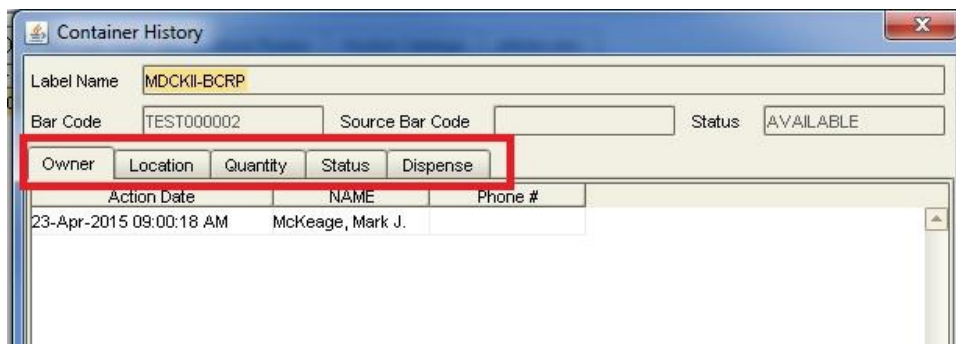
Change Amount End Amount

OK Cancel

7.4 Checking container history

- Go to the **Search** tab. Search for the container.
- **Right Click** the selected container in the result pane.
- Select **Container History**.

The information on owner, location, quantity, status and dispense are displayed under different tabs.



Container History

Label Name MDCKII-BCRP

Bar Code TEST000002 Source Bar Code Status AVAILABLE

Owner Location Quantity Status Dispense

Action Date	NAME	Phone #
23-Apr-2015 09:00:18 AM	McKeage, Mark J.	

8 Disposing of Biologicals

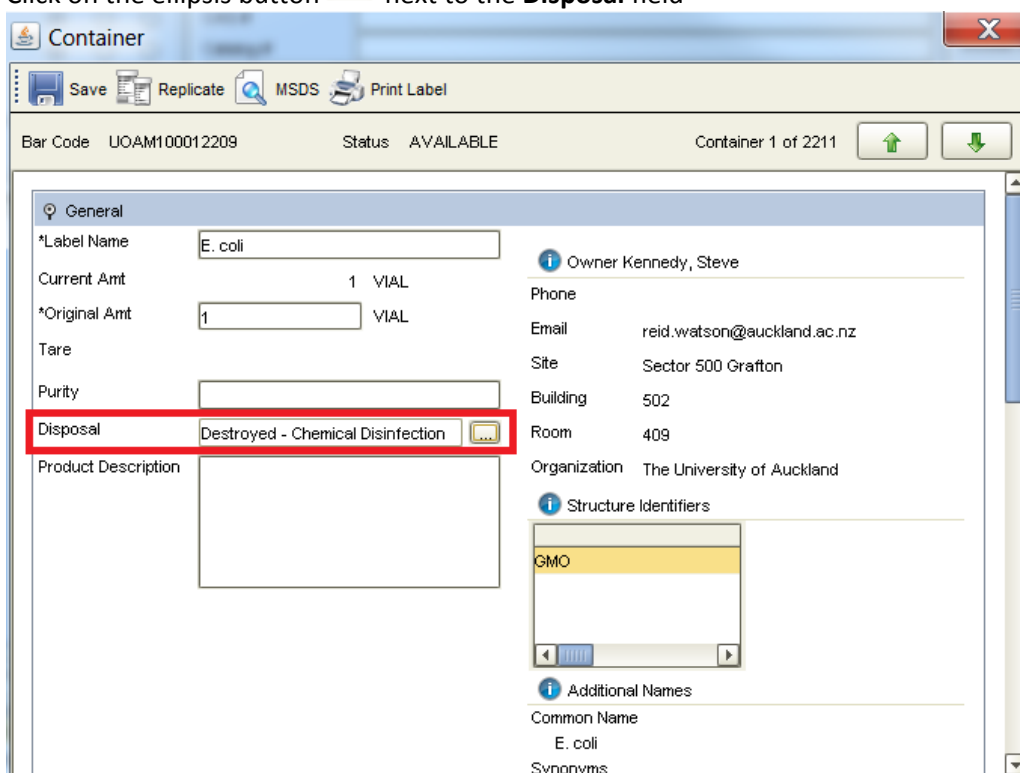
8.1 Step 1: Indicate disposal method

Note that this step is only required where MPI needs a record of disposal. When disposing cell lines that are thawed for use or culture, this step is not required and the items should be “disposed empty”.

Go to the **Search** tab. Search for the container.

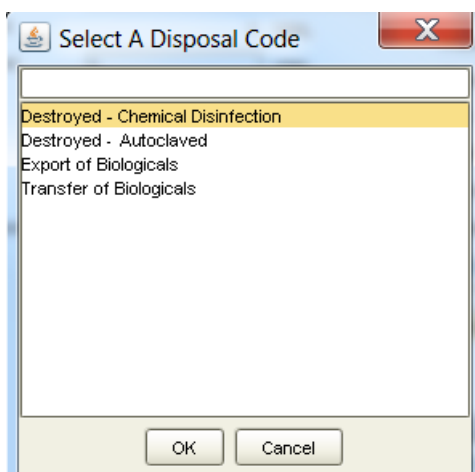
Right Click the selected container in the result pane and choose **Container Operations -> Edit**

Click on the ellipsis button  next to the **Disposal** field



The screenshot shows the 'Container' edit window. The 'Disposal' field is highlighted with a red box, and the ellipsis button next to it is also highlighted. The window displays the following information:

- Bar Code: UOAM100012209
- Status: AVAILABLE
- Container 1 of 2211
- General tab selected.
- *Label Name: E. coli
- Current Amt: 1 VIAL
- *Original Amt: 1 VIAL
- Tare:
- Purity:
- Disposal: Destroyed - Chemical Disinfection (highlighted)
- Product Description:
- Owner: Kennedy, Steve
- Phone:
- Email: reid.watson@auckland.ac.nz
- Site: Sector 500 Grafton
- Building: 502
- Room: 409
- Organization: The University of Auckland
- Structure Identifiers: GMO
- Additional Names: Common Name: E. coli, Synonyms:

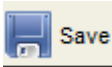


The screenshot shows the 'Select A Disposal Code' dialog box. It contains a list of disposal codes:

- Destroyed - Chemical Disinfection (selected)
- Destroyed - Autoclaved
- Export of Biologicals
- Transfer of Biologicals

Buttons for OK and Cancel are at the bottom.

Depending on the disposal method, choose either **Destroyed – Chemical Disinfection** or **Destroyed – autoclaved**. If the biological has been exported or transferred out of the University of Auckland rather than disposed, select the correct code here. Click **OK**.

Save the change by clicking the **Save** button 

The next step is to set the status of the container to “Disposed”. This can be done in bulk using a scanner or manually as follows:

8.2 Step 2: Dispose of the container in SciQuest ERM

8.2.1 Dispose manually

Go to the **Search** tab. Search for the container.

Right Click the selected container in the result pane and choose **Container Operations -> Dispose**

Select **Dispose** if the material in the container was not used up, or **Dispose Empty** if it was.

8.2.2 Dispose with a scanner

Containers may be quickly disposed of in bulk using Scan Operations.

- 1) Use the provided Barcode Disposal Sheet, or generate a barcode worksheet with the functions “Dispose” and “Dispose Empty”
- 2) Select **File > Scan Operations**
- 3) Scan the “Dispose” or “Dispose Empty” barcode as required (Dispose Empty means that the material was used up before disposal and “Dispose” means that some material was disposed).
- 4) Scan the barcodes to be disposed
- 5) Scan the “Done” barcode

Glossary

Term	Description
Biological	A material created from a living organism
CAS number	A unique number used to identify chemicals
Container	Any vessel that holds a material. All containers must be owned by a current PI.
Container Flex Field	A field to record important details regarding your biological items
DLP	The Designated Laboratory Person is responsible for validation and control of Shopping Carts and communications with STC regarding these. Ensures quality, health and safety standards are adhered to and also receives and identifies the final location of goods
eMolecules	A gateway to search for smaller chemical companies
SciQuest ERM	SciQuest Enterprise Reagent Manager
Hazard Approver	Able to approve Shopping Carts of Hazardous chemicals and biologicals which require extra precautions, permits and documentation
Hosted Catalogs	A number of suppliers form the Hosted Catalogs. These are the University's key suppliers of laboratory products and most of them are managed by way of formal contracts. Price comparisons are able to be made.
Material	Any chemical or biological in the inventory system
MDL	Chemical table file format. They are text files that adhere to a strict format for representing multiple chemical structure records and associated data fields.
MPI	Ministry for Primary Industries, a regulatory body for hazardous and restricted materials
MPI Restricted	An item that requires MPI authorisation to import or transfer.
MSDS	Material Safety Data Sheets
Non-Hosted Catalogue	Requests for Non-Hosted Catalogue items can only be made through SciQuest ERM if the vendor is set up in PeopleSoft Financials.

PeopleSoft Financials	Financial and purchasing system used by the University of Auckland
PI	A PI (Principal Investigator) in SciQuest ERM is the responsible owner of chemicals and risk biologicals purchased by them or for them
Receiving Locations	Primary delivery locations for receiving SciQuest ERM Orders into the University
Recipient	This is the Principal Investigator or the project leader. In all cases the Principal Investigator is responsible for Health & Safety and Containment
Researcher	A researcher in SciQuest ERM is a PI, technician, or student
Shopping Cart	Requisitions are saved in the form of a Shopping Cart
STC	Shared Transaction Centre. A team within University of Auckland Finance Service Division who are responsible for processing Shopping Carts (purchase orders) placed through SciQuest ERM.
Stock Room	On-site stores that sell commonly used consumables and/or chemicals. Internal requests can be made to purchase items in the stockrooms. Stockrooms are also where most orders are delivered.
Storage Area	Location where chemicals may be stored but, no wet lab activity is carried out
Super User	A frequent user of SciQuest ERM and first point of contact for minor issues
TechnologyOne	The Finance system used by Uniservices



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SciQuest ERM

<https://www.auckland.ac.nz/en/students/academic-information/postgraduate-students/sciquest-erm.html>

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