



SciQuest ERM Quick Reference Guide for DLPs – Submitting, Receiving, and Receipting Orders; New Containers; Scan Transactions

Reviewing a Researcher's Order

- DLPs will receive an email from the Requestor (Researcher) in the following format:
 - Saved requisition name
 - Supporting documentation such as MPI Import permit (when importing restricted materials)
- Search for the saved requisition, click the plus  button to "Copy As New"

Find 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.
 - Alternatively search by Requestor
- DLP advises Researcher of any required changes and asks these to be remedied in SciQuest ERM and for an updated email to be sent.

Submitting an Order

After reviewing and saving your own or a Researcher's cart you submit it through the SSC Portal or by emailing the UniServices Purchasing team.


Note: You don't need to click the 'Submit' button in SciQuest ERM for these orders

Process through the SSC Portal:

- SciQuest Shopping Cart** is the Requisition Number
- Department** is that which the Cost Centre being ordered from belongs to.

Receiving


Most items will be 'Received' by Stores technicians

- Items ordered through SciQuest ERM, and subsequently delivered to the University of Auckland will need to be "Received" through SciQuest ERM.
- Receiving of items can be carried out under the "Receiving" tab.
- Click** on the Receiving tab.
- Enter** the Purchase Order number (PO number) for the item to be received in the PO Number/ Req Number field in the Criteria pane.
- Click** Search to retrieve the item to be received.
Note: If there is more than one item associated to the PO Number, **click** on the appropriate line item to display the requisition detail in the upper pane. **Enter the Qty Received** and any other identifiers you wish to populate.
- (If you have modified the Qty Received, **Press** the Tab button on your keyboard; the outstanding quantity will be automatically calculated.)
- Click** Receive Item  (Ctrl V). The Container Bar Codes window will open displaying the number of containers to be created.

Note: If you are using pre-printed bar code labels the Barcode field will be blank, allowing you to scan or type in the new Barcodes you will be using.

Click OK.

Receipting

- DLPs will pick up items received through SciQuest ERM from the stockroom or certain holding areas.
 - DLPs will have to transfer the item to the storage location and record the transfer in SciQuest ERM.
- 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. 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 storage location. Press the **Use** button and change the location (Sublocations can be found by pressing the ellipsis icon  underneath). Note that you do not need to change the Storage location as well.
 - Press the **Transfer** button to confirm the transfer.
 - For MPI restricted items, enter the information required by MPI by right clicking the selected container in the result pane.
 - Select Container Operations, then Edit.
 - Enter the information under the Additional Fields table.

Creating a Container for items not entered in SciQuest ERM

- Click** Materials tab. **Enter** search criteria in Name/Identifier field (preferably CAS number). Wildcards (*) should be used to assist your search.
- Click** the **Search** icon. If the required material doesn't exist, create a new material:

Creating Materials

- Click New Substance** icon and type a Common Name, click OK. **Create a New Material** window opens - complete as many details as possible, including the CAS number if available. **Click** Save then search for material.
- Right Click** the selected material and **Select** "Create Container" option.
 - Complete** the Container information.
Note: For Supplier **Select** "UoA created" if the material is newly created in the University.
 - Enter/Scan** a pre-printed Barcode. **Click** Save.
 - Complete** the Container information.

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Receipting with a Scanner / Changing item owner or location with a Scanner

DLPs can carry out a Scan Transaction to Receipt the item in SciQuest ERM instead of performing a manual Container Transfer. This is the same process used to change the location or owner of containers.

1. Set up and print a barcode worksheet in **File > Bar Code Worksheet**, with the “Check In” barcode. You may select up to four users (PIs)
2. Go to **File > Scan Operations**
3. Scan the **Check In** barcode
4. Scan the barcode of the item’s owner (PI)
5. Scan the barcode of the item’s new location or sublocation
6. Scan the SciQuest ERM barcode of the item(s) that are to be transferred (or type in by clicking Keyboard Entry)
7. Scan the Done barcode

Disposals with a Scanner

Chemicals may be quickly disposed of in bulk using Scan Operations. Biological items require a more rigorous record of disposal – please refer to your manual.

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

Suppress Scanner Power Up Beeps

Scan a bar code below to select whether or not to suppress scanner beeps upon power up.



***Do Not Suppress Power Up Beeps
(0)**



**Suppress Power Up Beeps
(1)**

Suppress Scanner Decode Beeps

Scan a bar code below to select whether or not to suppress scanner beeps after a good decode.



***Beep After Good Decode
(Enable)
(1)**



**Do Not Beep After Good Decode
(Disable)
(0)**

Change Scanner Beep Volume

Scan a bar code below to change the volume of the scanner beep.



**Low Volume
(2)**



**Medium Volume
(1)**



***High Volume
(0)**