

SciQuest ERM Quick Reference Guide – Search, Order, Use and Dispose

Searching for Materials

1. **Click** Search Tab: **Select** any source to search. Use **All** or **Preferred** radio buttons for searching in Inventory, Storage Areas and Stock Rooms on your site or those that you are assigned to.
2. Use the **All** radio button for searching Hosted Catalogues (products from major suppliers) or e-Molecules (smaller chemical suppliers).
3. Narrow search results by entering any search criteria in the text fields: text **name** (a Wildcard* can be used), **CAS #** (Hint: dashes are not required), **Catalogue #**, **Customer Identifier**, **Molecular weight range** or **Keywords**.
4. For advanced searching Inventory icon will allow you to search using **Barcodes** and **Location**.
5. **Click Search**. Your results will show.

Searching for Biologicals

1. **Click** Search Tab: Use **Container Flex Fields** function and **enter** any search criteria in the flex fields.

Searching by Drawing a Structure

1. **Click** Search Tab or Structure Search Tab: Search using either SciQuest ERM Structure Drawing Programme or import a file from external programmes i.e. Chemdraw.
2. To draw a structure, **Click** on the  icon to **open** the SciQuest ERM Structure Drawing Programme. Once complete **Click** the **Close** button and results show in Structure ID pane. Select structure(s) and Press Search.
3. To import a file, **Click** Import . Navigate to the location of the .mol file you want to import
4. To paste a structure from an external structure drawing tool, copy the structure from the external application and **Click** Paste. 

Note: If using this method files must be saved as either an MDL SD File (.sdf) or an MDL Molfile (.mol).

Creating Orders

Different processes exist depending on where you order from.

Hosted Catalogue and e-Molecule Ordering

1. **Search** for required material in the Search tab:
2. **Add material to the Shopping Cart:**
Click  next to the item to add to the Shopping Cart. A consolidated message appears.
Review any messages that appear including COP warnings, and existing inventory reminders.
Click the OK button to add to the Shopping Cart and Repeat to add additional materials to your requisition.
Note: Multiple Items in a Shopping Cart must be from a single Supplier.
3. **Complete the Shopping Cart order:**
Click Shopping Cart Tab.
Click the Hosted Catalogue or e-Molecules Source sub tab where you have created your requisition.

Check all fields are correct and complete. **Click** the Edit icon next to the item to make any changes.

It is **mandatory** to declare when the item is MPI restricted or hazardous.

Under Supplemental information be sure to fill in the A.1.MPI-Restricted field which is mandatory. If your item is not MPI restricted, choose 'false'.

If a Restricted or Hazardous material is ordered an additional step is required. i.e. **You must Click** the Edit icon next to the material. The Line Item window appears. **Change** the appropriate hazard descriptor to true.

Press Save to return to the Shopping Cart.

4. **Save and Email the order to your DLP:**
Click the **Save As** button. A prompt to save and name your requisition appears. **Note:** Name the Shopping Cart in the following format: **Requestor name_date_a number** (this distinguishes the orders placed by the same Researcher on the same date). If you reuse a cart name it will save over your previous cart. **Click** OK.

Email the DLP for review. **Note:** The email must have the following:

- Saved requisition name
- Supporting documentation such as MPI Import permit (when importing restricted materials)

If there is an issue with the Order the DLP advises you to remedy in SciQuest ERM and save and resend an email.

Quick Tip: Once the Shopping Cart is closed you can't add anything to it so **Click** **Reset** button to make another Shopping Cart.

5. **Order Arrives:**
ALL orders are received by the Stock Room and checked into SciQuest ERM. The DLP determines where the material is to be located.

Non-Hosted Catalogue Ordering

If a material is not in the Hosted catalogues, purchase through Non-Hosted Catalogue. If a Supplier is not found a formal process to establish the Supplier must be undertaken with STC.

1. **Click Shopping Cart Tab** and **Click** the Non-Hosted Catalogue Source sub Tab.
Press  **Add Item** and complete the Line Item window details. **Check** all fields are correct and complete.
Note: If choosing the UniServices cost codes these are only used for TechOne orders and you also need to fill in the "Supplemental Information" section using RH_UniServices_Account_Number field. Orders will fail if UniServices and UoA cost codes are on the same Order.
2. **Complete the Shopping Cart order:**
Press Save to return to the Shopping Cart.
3. **Save and Email the order to your DLP:**
Follow the same process as Hosted Catalogues.
4. **Order Arrives:**
Follow the same process as Hosted Catalogues.

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Stock Room Ordering

1. **Search** for required material in the Search tab:

In the Search Tab, select the Stock Rooms All radio button then Search for the item(s). The results will appear on the Stock Rooms tab. To see all items sold through your Stock Room, perform a Stock Rooms search with two wildcards (**) in the Name field.

2. **Add** material to the Shopping Cart:

Click  icon next to the item and add to the Shopping Cart.

3. **Complete** the Shopping Cart order:

Click the Shopping Cart Tab and then the Stock Room sub tab where you have created your requisition. **Complete** all fields marked with an asterisk (*)

- The Recipient may be you if you have the authority to access your PI's account codes
- Change the amount requested by typing over the number in the Ordered column
- If ordering from a UniServices account select "Uniservices Project" as the Cost Center and right click on the item in your shopping cart and click 'View/Add notes'. Put the UniServices Project code here.

4. **Press the submit button.** Collect your order from the

Stock Room. 

Working with Materials

Searching for Materials

1. **Click** Materials Tab to search for existing materials. Use ALL and a CAS number if available or any other common search criteria (a Wildcard* can be used). Results show with any regulatory lists associated to the materials. Select individual materials to display.
2. For more information **Right Click** the material and **Select** View Material to display material properties.

Creating Materials

1. **Click** Materials Tab, **Click New Substance** icon to open. **Create** a New Material window and complete as many details as possible, including the CAS number if available. **Click** Save.

Working with Containers

Creating a Container for items not entered in SciQuest ERM

1. **Click** Materials tab. **Enter** search criteria in Name/Identifier field. It can be a common name, MDL#, CAS # or Custom Compound ID. Wildcards (*) should be used to assist your search.
2. **Click** the **Search** icon. If the required material doesn't exist, create a new material as described in the previous section Creating Materials
3. **Right Click** the selected material and **Select** "Create Container" option.
4. **Complete** the Container information.
Note: For Supplier **Select** "UoA created" if the material is newly created in the University.
5. **Enter/Scan** a pre-printed Barcode. **Click** Save.

Replicating an existing Container

1. **Search** for Container in Search Tab and Advanced Inventory. Enter Barcode and results will appear.
2. **Right Click** the container. **Select** Container Operations and **Select** Replicate.
3. **Complete** the Replicate window information.

Viewing/Editing a Container

1. **Search** for the Container through Search Tab and Advanced Inventory. Enter Barcode and results will appear. **Right Click** the container.
2. **Select** View Container or Edit Container (depending on assigned permissions).

Disposing

Restricted or Hazardous chemical/biological materials are transferred to a holding area (e.g. hazardous goods bunker) before disposal. Notify your DLP of such items. You may also dispose of items using a scanner.

Chemicals

1. **Search** for Container in the **Search Tab** and **Right Click** container in results pane.
2. **Select** Container Operations>Dispose Containers.
3. **Select** **Dispose** (if container is not empty) or **Dispose Empty**.

Biologicals

1. **Search** for Container in the **Search Tab** and **Right Click** container in results pane.
2. **Select** **View Container**, **Click** **Edit** icon.
3. **Click** **Storage/Disposal** field icon.
4. **Select** **Destroyed – Chemical Disinfection** or **Destroyed autoclaved**. **Click** OK.
5. **Click** Save.
6. **Right Click** the selected container in the results pane.
7. **Select** Container Operations
8. **Select** Dispose.

Hot Tips

- A material is a substance, and a container is the vessel which holds the material.
- One supplier one cart.
- Do not mix Technology One and PeopleSoft orders in the same cart.
- You can only have one cost centre per cart.
- PI is responsible for all items held by the research group.
- If the items in your shopping cart are not restricted biologicals you must select MPI_Restricted as false.
- Use Wildcards (*) often when searching by names.

For more information and for access to SciQuest ERM go to the University of Auckland SciQuest ERM Internet page:

<https://www.auckland.ac.nz/en/for/current-students/cs-current-pg/sciquest-erm.html>