



THE UNIVERSITY OF
AUCKLAND
Te Whare Wānanga o Tāmaki Makaurau
NEW ZEALAND

SciQuest ERM 8.1.1

Researcher Master Manual

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1 Introduction

Welcome to 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.

SciQuest ERM also allows you to share materials that are surplus to requirements.

1.1 The purpose of this document

There are three types of system roles in SciQuest ERM

- Researcher
- Designated Laboratory Person (DLP)
- the Hazard Approver

This manual is for a Researcher and the permissions you have in SciQuest ERM allow you to:

- Search for materials
- Create and save a requisition in the form of a Shopping Cart
- Create materials and containers
- Transfer materials
- Dispose of materials

Other roles in SciQuest ERM are the Designated Laboratory Person (DLP) who approves your Shopping Cart and the Hazard Approver who approves any Shopping Carts with hazardous or restricted materials.

1.2 Training

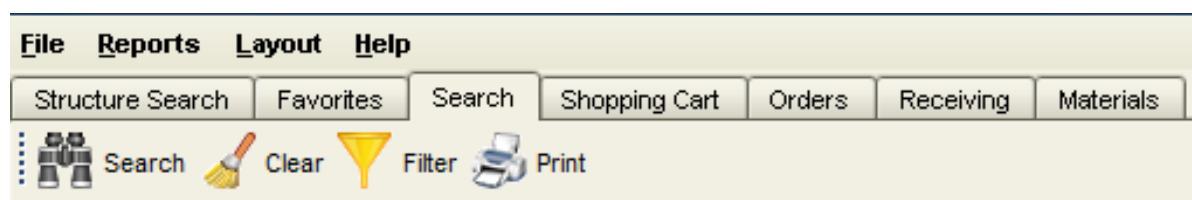
Training is divided into topics and you should view the topics in the order they are numbered.

1. Overview of Tabs and their uses
2. Setting up your Preferences
3. Searching for materials
4. Creating a requisition as a Shopping Cart
5. Receiving processes
6. Working with Materials
7. Working with Containers
8. Disposing processes

1.3 Overview of Tabs and their Uses

Clicking on the top-level tabs in the browser window gives you access to functions of the system. Tabs are hidden or displayed depending on your user permissions.

The following Tabs focus on the permissions of a Researcher / Student.

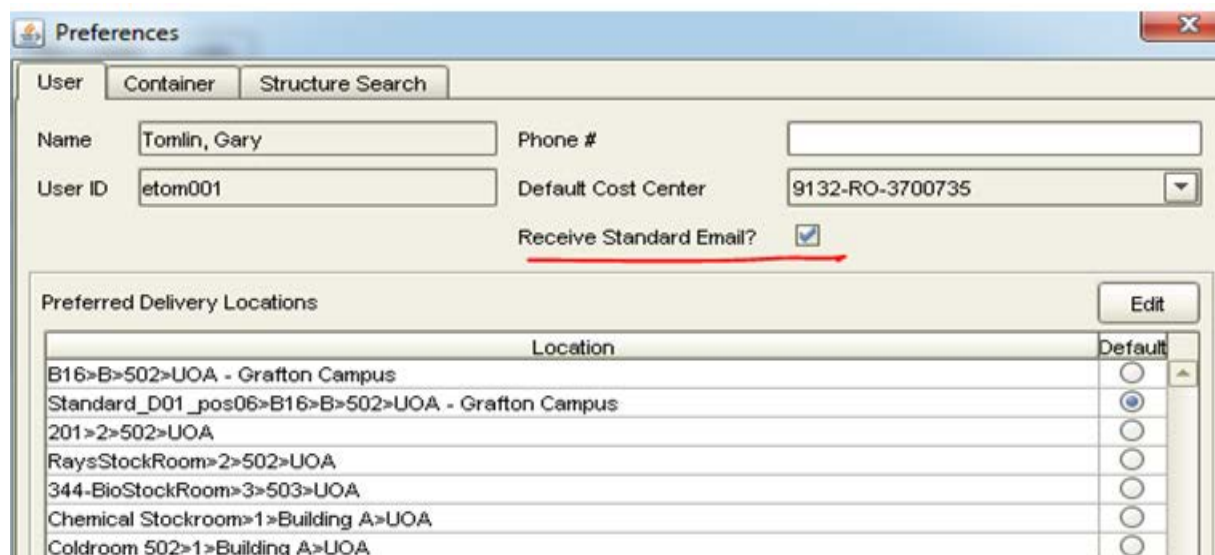


Structure Search Tab	You can search for structures by various identifiers. The search provides results in the form of individual structure renderings that can be manipulated according to your needs.
Favourites Tab	You can create and maintain a list of favourite materials from Hosted Catalogues and Stockrooms. Materials from this list of favourites can be added directly to the Shopping Cart tab from the Favourites tab.
Search Tab	You can search in a number of ways for chemical or non-chemical materials or containers via Hosted Catalogues, Inventory, Storage Area, Stock Rooms, e-Molecules sources.
Shopping Cart Tab	Displays the requested materials from your Search. You can save requisitions and container requests.
Orders Tab	You can search for and view historical Shopping Carts and also select to be ordered again using the same information.
Receiving Tab	Allows you to receive containers, assign and or print Barcodes.
Materials Tab	You can search for and view ERM materials by various criteria. ALL researchers have the ability to create containers and create materials.

1.4 Setting up your Preferences

Click **File** and **Choose Preferences**. Then you must **Set Up** or check the following:

1.4.1 User Tab

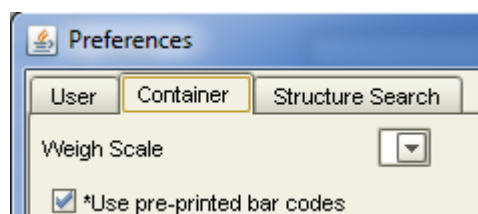


The screenshot shows the 'Preferences' dialog box with the 'User' tab selected. The 'Name' field contains 'Tomlin, Gary', 'User ID' is 'etom001', and 'Default Cost Center' is '9132-RO-3700735'. The 'Receive Standard Email?' checkbox is checked and highlighted with a red arrow. Below this is a table of 'Preferred Delivery Locations' with an 'Edit' button.

Location	Default
B16>B>502>UOA - Grafton Campus	<input type="radio"/>
Standard_D01_pos06>B16>B>502>UOA - Grafton Campus	<input checked="" type="radio"/>
201>2>502>UOA	<input type="radio"/>
RaysStockRoom>2>502>UOA	<input type="radio"/>
344-BioStockRoom>3>503>UOA	<input type="radio"/>
Chemical Stockroom>1>Building A>UOA	<input type="radio"/>
Coldroom 502>1>Building A>UOA	<input type="radio"/>

1. Check that the “**Receive Standard Email**” has been checked.
2. Check that your **Preferred Delivery Location** is correct. If your location is not on the list, **Click** the Edit button and find your location in the left hand panel, **Click >>** and then **Click** the OK button. You can now select the location from the Preferred Delivery Location list.
3. If you are a Principal Investigator, check that your **Default Cost centre** is correct, if applicable. If you are the owner of grants you may also check that you have access to all the cost centres you require by looking through the drop-down list of Cost Centres. If any are missing, please email sciquest@auckland.ac.nz .

1.4.2 Container Tab

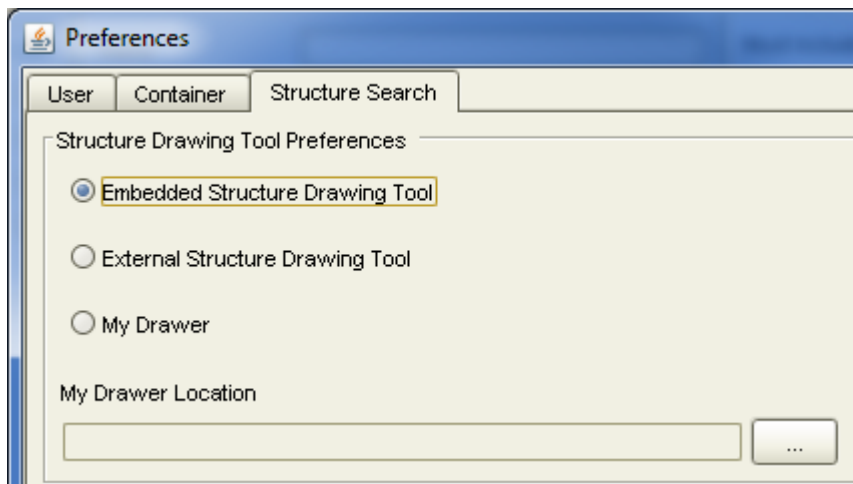


The screenshot shows the 'Preferences' dialog box with the 'Container' tab selected. The '*Use pre-printed bar codes' checkbox is checked.

1. If pre-printed Barcode labels are being used then **Select** the “**Use pre-printed bar codes**” box.
2. Uncheck the box if Barcode labels are going to be generated by SciQuest ERM.

1.4.3 Structure Search Tab

Select the drawing tool to be used.

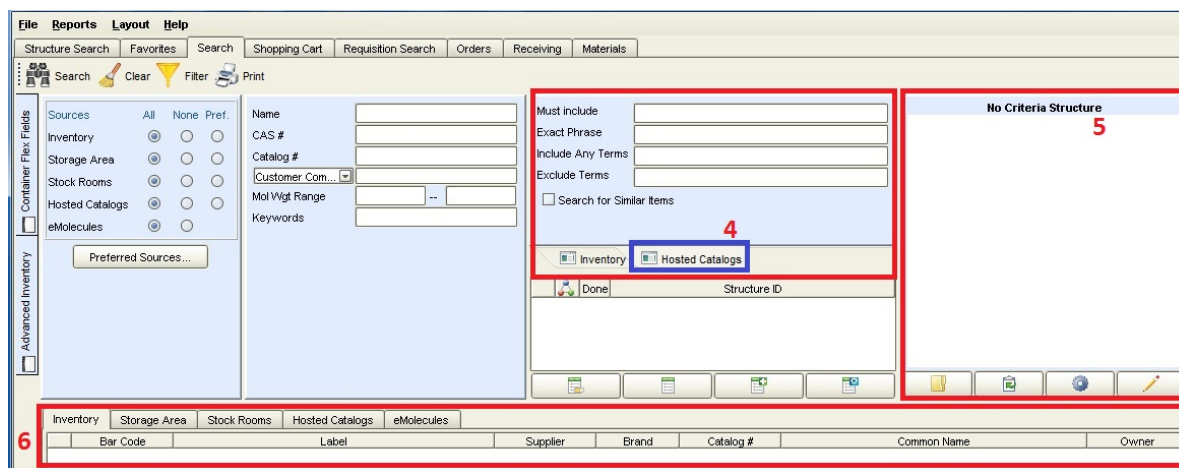
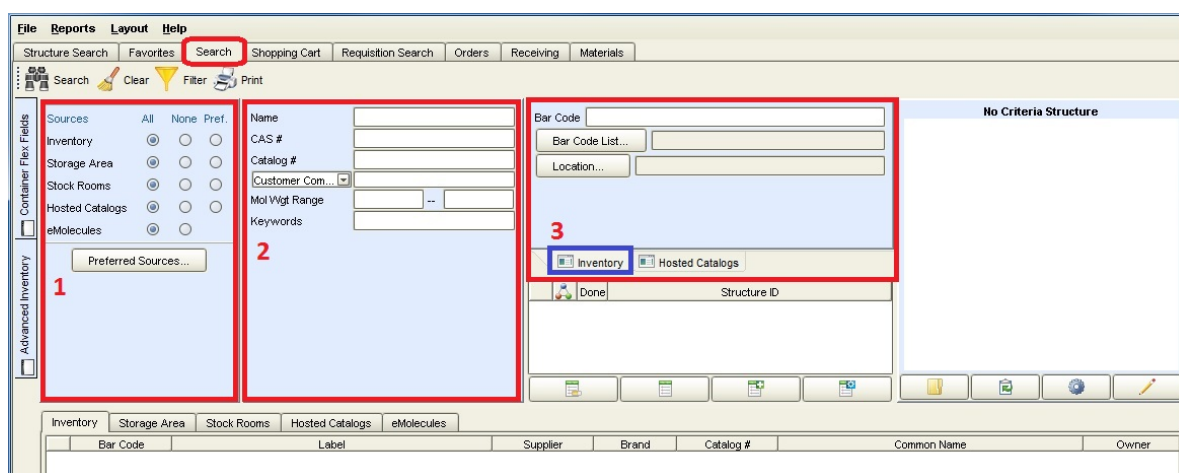


2 Searching

A key benefit of SciQuest ERM is that it allows you to search for materials in sources **Internal and External** to the University.

- **Internal sources** are laboratories, Storage Areas and Stock Room on your site or that you are assigned to.
- **External sources** are Hosted Catalogues of our major suppliers and e-Molecules which is a gateway to smaller chemical companies' catalogues.

1. Searches are carried out under the “**Search**” tab.



- The Sources pane is where the source(s) can be selected (1)
- The main search criteria pane is where you can input main criteria (2)
- The Inventory icon is where you can carry out an advanced search with barcode and location (3)
- The Hosted Catalogue tab is where you can carry out an advanced search in Hosted catalogues by including and/or excluding certain phrases/terms/keywords (4)
- The structure quick search pane is where you can search by structure (5)

- The result pane is where the results of your search will appear. It is divided into 5 sub-tabs (6) Sub-tabs: Inventory, Storage Area, Stock Rooms, Hosted Catalogues, e-Molecules corresponding to the internal and external sources.

2. **Select a Source** for the search i.e. Internal Sources - Inventory, Storage Areas, Stock Rooms, and External Sources - Hosted Catalogues and e-Molecules.

Sources	All	None	Pref.
Inventory	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Storage Area	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stock Rooms	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hosted Catalogs	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
eMolecules	<input checked="" type="radio"/>	<input type="radio"/>	

- **Inventory searches**

Searches all materials stored in the laboratories on your site or that you are assigned to.

- **Storage Area searches**

Searches specific areas used for storage of chemicals where no wet lab activity is carried out.

- **Stock Rooms searches**

On-site stores that sell commonly-used consumables and/or chemicals are searched.

Note: Use the **All** or **Preferred** radio buttons for searching Inventory, Storage Areas and Stock Rooms.

- **Hosted Catalogue searches**


Products from our major suppliers are searched. You have the ability to compare prices between suppliers.

Note: Use the **All** radio button for searching Hosted Catalogues. Refer to Ordering processes in this manual to help you place orders from Non-Hosted catalogues for materials not found.

- **e-Molecule searches**

A gateway for smaller chemical suppliers is searched.

Note: Use the **All** radio buttons for e-Molecule searches.

3. Enter the CAS number if available. Alternatively you may search by name using wildcards (*), or by other criteria such as molecular weight range or MDL number. Press the search button.  Search

Name	<input type="text" value="*Sodium*bicarbonate*"/>
CAS #	<input type="text"/>
Catalog #	<input type="text"/>
Customer Com...	<input type="text"/>
Mol Wgt Range	<input type="text"/> -- <input type="text"/>
Keywords	<input type="text"/>



2.1 Basic Searches

When performing a search by name, consider the criteria you are using. Entering specific criteria or combining criteria from different fields will return fewer results than using broader terms.

The image shows a search form with the following fields:

- Name: [Text input box]
- CAS #: [Text input box]
- Catalog #: [Text input box]
- Customer Com...: [Dropdown menu]
- Mol Wgt Range: [Text input box] -- [Text input box]
- Keywords: [Text input box]

Search field name	Description
Name	<p>Chemical name, description or alias. Text can be entered or pasted from another application.</p> <p>Searching Hosted Catalogues:</p> <p>No wildcards are used for searching Hosted Catalogues. Search by product name, such as potassium chloride or gloves. This searches for the words in the order listed, so latex gloves gives different results to gloves latex.</p> <p>Searching Inventory and Storage Areas (your inventories):</p> <p>Wildcards (*) can be used. Searching by name must exactly match the name in SciQuest ERM, therefore may not always give you a result without wildcards; consider the text you are using as naming conventions may differ. Try different aliases or use wildcards (*) to search for partial text strings:</p> <p>E.g. to search for Potassium chloride:</p> <p>Potas* will return all materials that begin with "Potas".</p> <p>*chloride will return all materials that end with "chloride".</p> <p>*Potas*chlor* will return all materials that contain the text "Potas" followed by "chlor" with anything in-between, and anything at the start or end.</p>
CAS #	<p>Using a CAS number is one of the easiest ways to search. Searching by the CAS # generates a search of all materials in Inventory, Storage Areas, Hosted Catalogues and e-Molecules. Numbers can be entered or pasted from another application. If pasting from another application be careful there is no space at the end.</p>
Catalog #	<p>Search using the Vendor's catalogue or manufacturer part number. Text can be entered or pasted from another application.</p>
Identifier	<p>Search using either a customer compound identifier number, MDL number, or a SciQuest chemical number. Select the type prior to entering number.</p>
Mol Wgt Range	<p>Search using a Molecular weight range. If only a low value is entered, the search is a greater-than-or-equal-to search. If only a high value is entered, the search is a less-than-or-equal-to search.</p>

Keywords

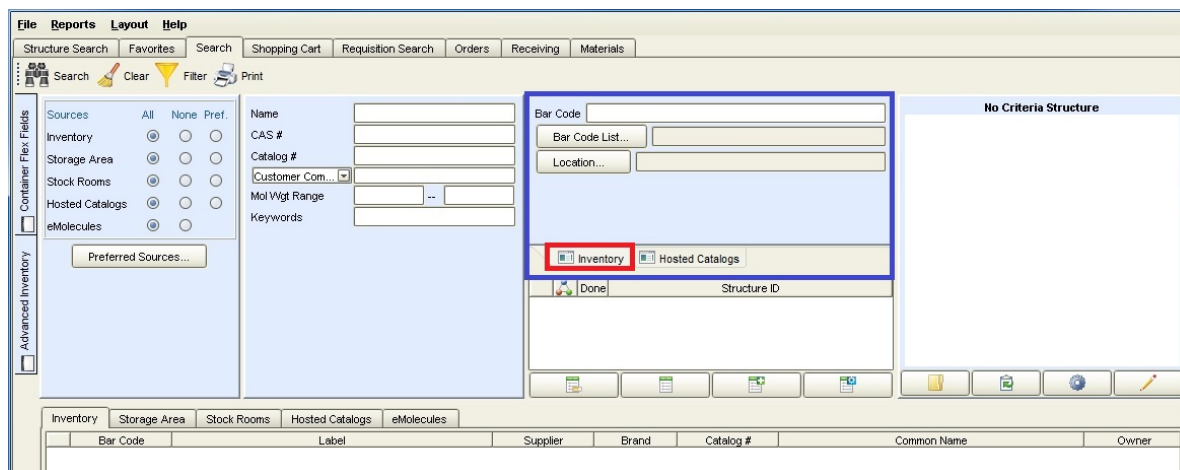
Searching by grade, size or the type of chemical you are looking for is helpful in limiting the result set.

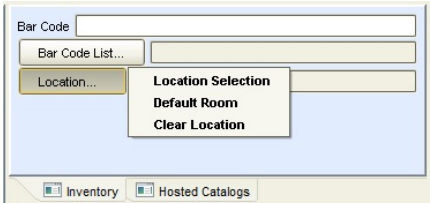
2.2 Advanced searches

When performing advanced searches, additional criteria can be entered to specify and narrow down your search.

2.2.1 Inventory Tab

You can search by Barcode or Barcode List using the Inventory function button. **Click** the Inventory function button to bring up these fields.



Search Field name	Description
Bar Code	By searching for a container using the Barcode your search is limited to the internal Inventory source. Text can be entered or pasted from another application.
Bar Code List	You can search for a container using Barcodes from an imported or pasted list e.g. from Excel
Location	<p>Searching by using a location narrows your search. You use the Inventory function button. Click the Inventory function button to bring up the dialogue window.</p>  <p>Click Location and select one of the options e.g. Location Selection, Default Room or Clear Location</p> <p>To select Location to search expand the location buttons until you get to appropriate the storage area you wish 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.</p>

Select a Location

Sector 500 Grafton

- 501
 - 2
 - 6
 - B
 - B30
 - 80-04 (Farm A)
 - 80-05 (Farm A)
 - Shelf 1_Rack AD
 - Shelf 1_Rack AE
 - Shelf 1_Rack AF
 - Shelf 2_Rack N
 - Shelf 2_Rack O
 - Shelf 2_Rack P
 - Shelf 2_Rack Q
 - Shelf 3_Rack R
 - Shelf 3_Rack S
 - Shelf 3_Rack T
 - Shelf 4

Sector 500 Grafton>501>B>B30>80-05 (Farm A)

OK Cancel

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.

Sublocation	Expiration D
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid A01	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid A02	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid A04	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid A05	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid A06	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid A07	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid A08	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid B01	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid B02	
>B>B30 80-05 (Farm A)>Shelf 1_Rack AD>Box-17>Grid B04	

2.2.2 Advanced Inventory Tab – Searching by Owner

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.

File Reports Layout Help

Structure Search Favorites Search Shopping Cart Requisition Search Orders Receiving Materials

Search Clear Filter Print

Container Flex Fields

Advanced Inventory

Status: AVAILABLE

Owner: []

Organization: []

Date Type: []

Date: [] []

Project: []

Name: []

CAS #: []

Catalog #: []

Customer Com...: []

Mol Wgt Range: [] []

Keywords: []

Bar Code: []

Bar Code List...: []

Location...: []




No Criteria Structure

Inventory Hosted Catalogs

Done Structure ID

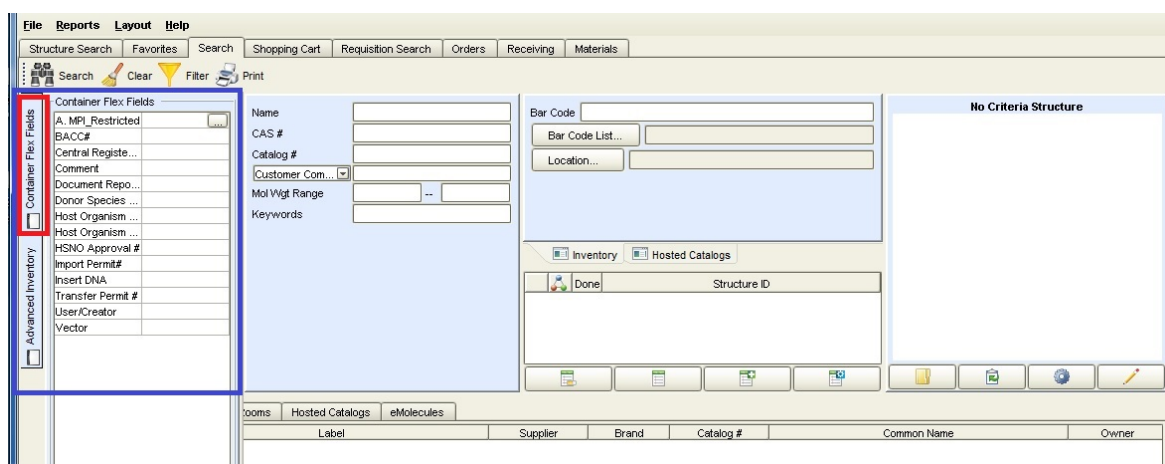
tooms Hosted Catalogs eMolecules

Label	Supplier	Brand	Catalog #	Common Name	Owner
-------	----------	-------	-----------	-------------	-------

Search field name	Description
Status	Status is not a standalone search and must be combined with at least one other search option. Status examples include: all, not disposed, disposed, in transit, available and disposed empty
Owner 	Choose the container owner from the list of users by selecting the Owner menu button.
Organization 	Choose the Organisation that owns a container from the list by selecting the Organization menu button.
Date type	Search for containers based on a particular event; Created, disposed, expiration, room acquired (<i>location</i>) or site acquired (<i>Faculty</i>).
Date range	Based on the date type, you can search within a date range e.g. containers which have expired between 01.08.2015 and 31.08.2015.
Allocation 	Search for containers based on projects from the list by selecting the Allocation menu button and opening Find an Allocation dialogue.

2.2.3 Biological searches

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

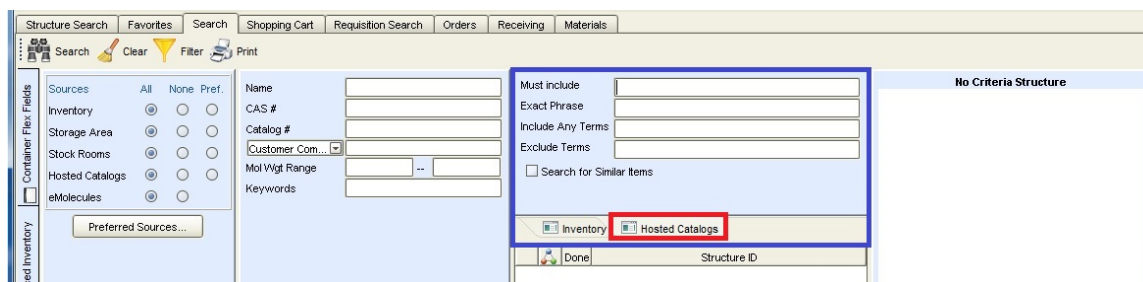


Click the Container Flex Fields function and search using any of the following fields:

Search field name	Description
A. MPI_Restricted	MPI restriction status. Either true or false.
BACC#	Biosecurity Authority/Clearance Certificate (BACC) number
Document Repository ID#	Document repository identification number
Donor Species DNA	For 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	For GMO, description of insert
Transfer Permit #	MPI transfer permit
Vector	For GMO, description of vector

2.2.4 Hosted Catalogue searches

When using the Hosted Catalogue icon you can narrow your search within the Hosted Catalogues. **Clicking** the Hosted Catalogue icon brings up the following fields.




Search field name	Description
Must include	Only materials which include all words entered in this field in any order will be returned in search results.
Exact Phrase	Only materials which include all words entered in this field, in the exact order and including spaces and punctuation, will be returned in search results.
Include Any Terms	Only materials that include any or all of the words, in any order, will be returned in search results. Search by any text or value. If entering multiple values, separate each with a space.
Exclude Terms	Combine this search with one of the others e.g. Must include and all words entered in this field will be excluded.

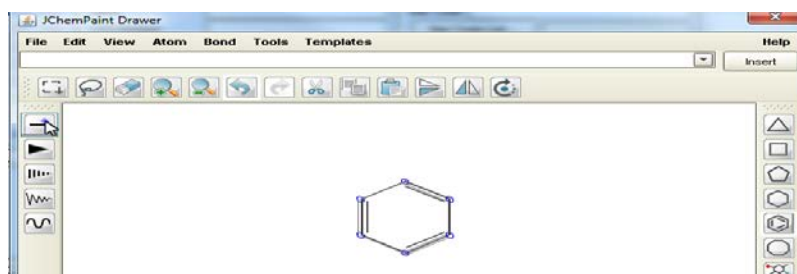
2.2.5 Drawing structure searches

Searching by drawing a structure narrows your search. Use the SciQuest ERM Structure Drawing Programme or structures imported from external programmes such as Chemdraw.

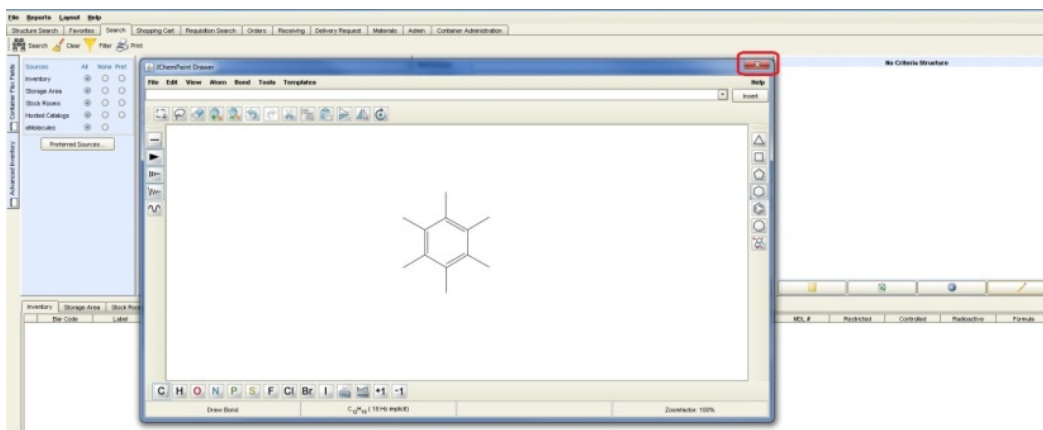
Drawing Structures using the SciQuest ERM Drawing Programme

To draw a structure, **Click** on the  icon. This will **open** the **structure drawing program** specified in your Preferences > Structure Search

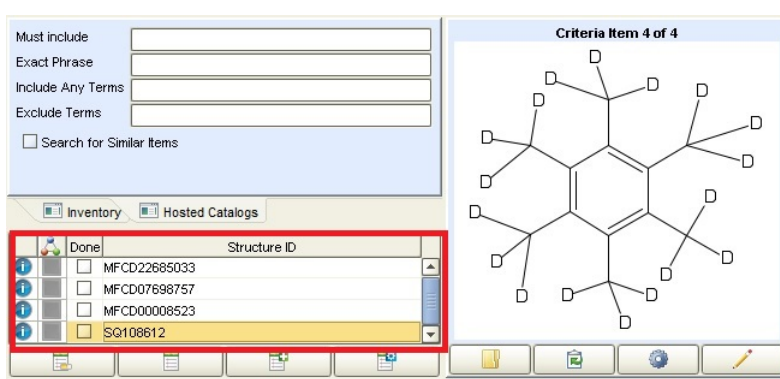
Once the drawing programme is open, draw the structure to be searched.



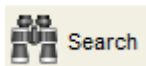
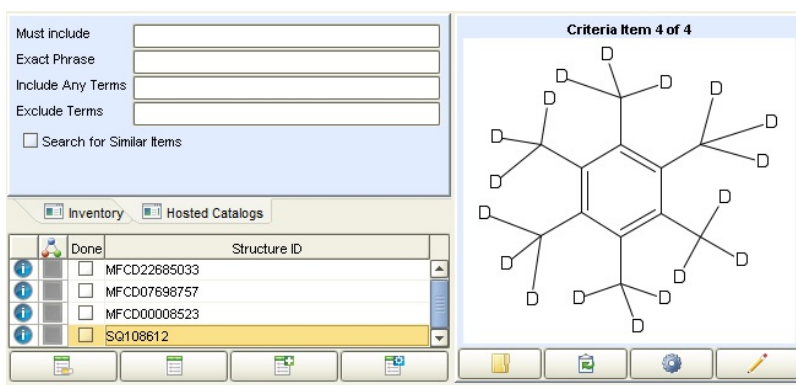
Once your structure is complete, click the **Close** button  to return to the search tab



The structure search will be activated automatically and the results for your selected sources will show in the **Structure ID** panel



Click on each Structure ID returned and find the one that matches your structure



Press the **Search** icon when the structure is found to start your search in the selected **Source**.

The screenshot displays the SciQuest ERM search interface. At the top, there are navigation tabs: Structure Search, Favorites, Search, Shopping Cart, Requisition Search, Orders, Receiving, and Materials. Below these are search controls: Search, Clear, Filter, and Print. The main search area is divided into several sections:

- Sources:** A list of search sources with radio buttons for selection: All, None, Pref., Inventory, Storage Area, Stock Rooms, Hosted Catalogs, and eMolecules.
- Search Criteria:** Fields for Name, CAS #, Catalog #, Customer Com..., Mol Wgt Range, and Keywords.
- Advanced Search:** Fields for Must include, Exact Phrase, Include Any Terms, and Exclude Terms. There is also a checkbox for "Search for Similar Items".
- Results List:** A table with columns for Done, Structure ID, and a list of search results including MFCDD2685033, MFCDD07698757, MFCDD00008523, and S0108612.
- Chemical Structure:** A drawing pane on the right showing a chemical structure labeled "Criteria Item 4 of 4".


At the bottom, there is a table showing search results with columns: MDL #, CAS #, Product, Supplier, Brand, Catalog #, Manufacture..., and Price.

MDL #	CAS #	Product	Supplier	Brand	Catalog #	Manufacture...	Price
	87-85-4	Hexamethylbenzene	AK Scientific, Inc.		Y1420		
	87-85-4	Hexamethylbenzene 98+% 25g	Thermo Fisher (New Zealand)		ACR120570250		460.45
MFCDD00008523	87-85-4	Hexamethylbenzene, 99%	Sigma-Aldrich (New Zealand)	SIGMA-ALDRICH	322377-1G	322377	37.00
MFCDD00008523	87-85-4	Hexamethylbenzene, 99%	Sigma-Aldrich (New Zealand)	SIGMA-ALDRICH	322377-5G	322377	90.50
MFCDD00008523	87-85-4	Hexamethylbenzene, purified by sublimation, =99%	Sigma-Aldrich (New Zealand)	SIGMA-ALDRICH	429082-1G	429082	76.90
MFCDD00008523	87-85-4	Hexamethylbenzene, purified by sublimation, =99%	Sigma-Aldrich (New Zealand)	SIGMA-ALDRICH	429082-5G	429082	322.50

- ### Drawing Structures using other Drawing Programmes

Structures can also be drawn using external programmes such as Chemdraw and imported to SciQuest ERM using two methods.

You can either copy from Chemdraw and paste into the structure area or Import from a saved file.

To import a file, **Click Import** . Navigate to the location of the .mol file you want to import

Select the file and **Click Open** or copy a structure from an external application and **Click Paste**



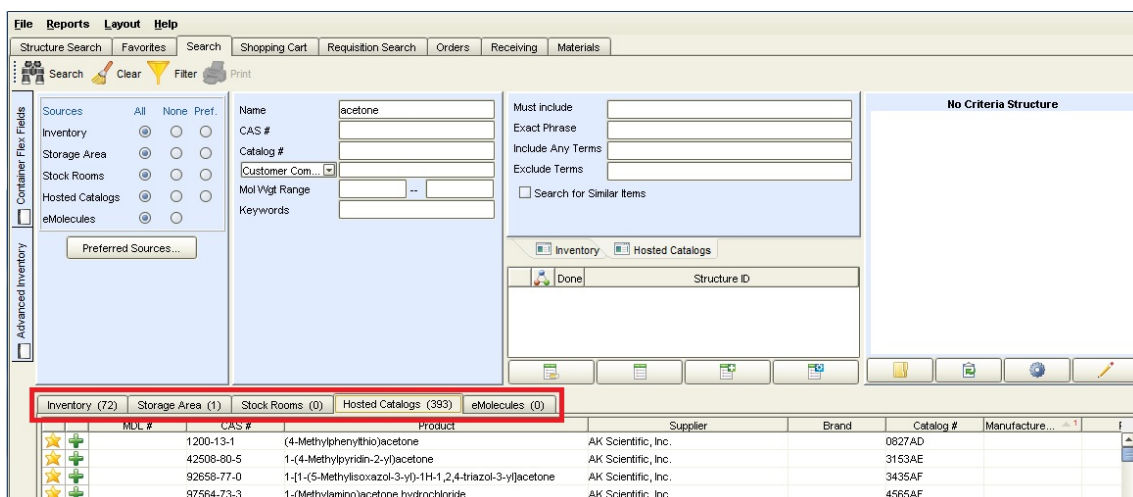
Note: If using this method files must be saved as either an MDL SD File (.sdf) or an MDL Molfile (.mol).

2.2.6 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).

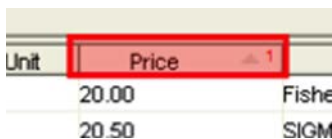
- #### Refining your results

You can further refine results by sorting or filtering columns.



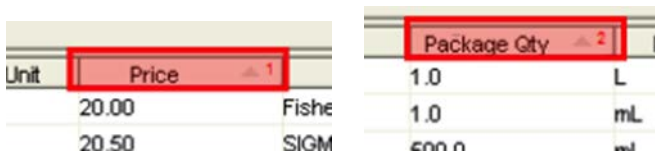
- **Sorting columns**

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.



- **Sort using multiple criteria**

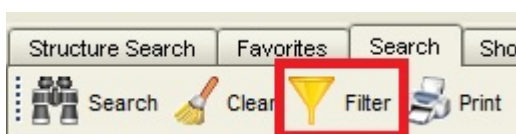
To sort by multiple criteria, press and hold the Control key while you click the criteria in the order they are to be sorted. The number next to each of the selected columns indicates the sort order.

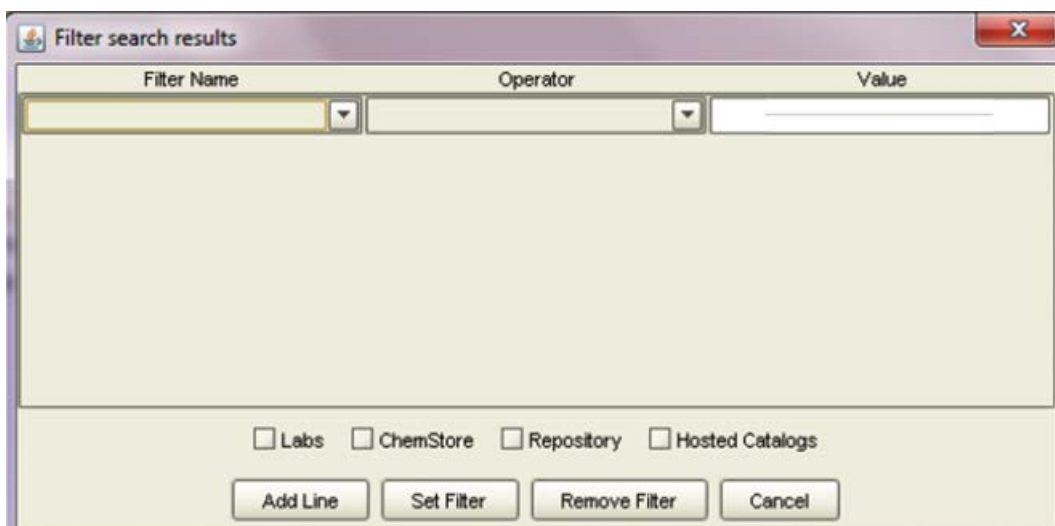


- **Filtering**

Filters can be applied before or after your search and can filter against one, several or all of your source tabs.

Click the **Filter** button to open the **Filter search results** dialogue





Click the **Filter Name** drop-down and **select** a column heading to be filtered.

Click the **Operator** drop-down and select appropriate operator (e.g. =, <, >) for your filtering criteria and **Enter** an alphanumeric value under **Value**

Click the **Add Line** button to create additional filter(s) if required

Select the check box(s) next to the source(s) to be filtered.

Click the **Set Filter** button. You will automatically be returned to the main Search window. The Filter button and the source tabs selected for filtering will have a filter indicator indicating that a filter is applied



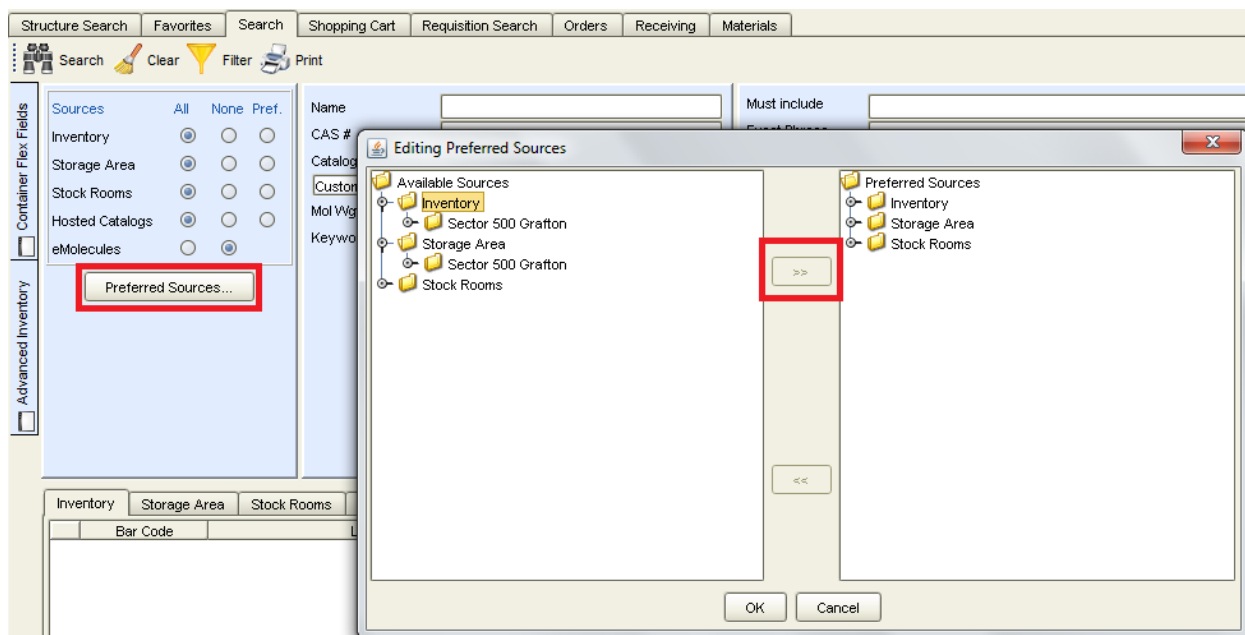
To remove the filter, click the filter button and press the remove filter button.




2.2.7 Drawing structure search of your inventory using Structure Search Tab

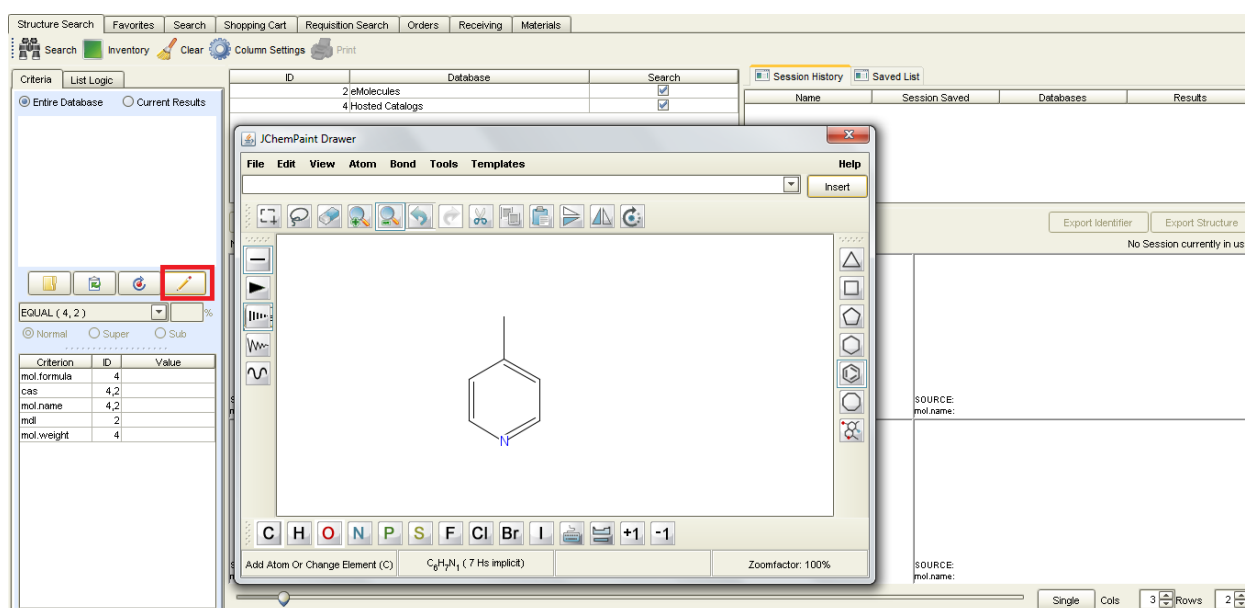
The Structure Search tab can be used to search your own inventory.


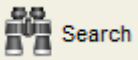
- 1) Start by choosing your **Preferred Sources** on the **Search Tab**. Choose the areas you wish to search in the Available Sources window and click the arrows to put them into the Preferred Sources window:



- 2) Go to the Structure Search tab. To draw a structure, **Click** on the  icon. This will **open** the **structure drawing program** specified in your Preferences > Structure Search

Once the drawing programme is open, draw the structure to be searched.



Once your structure is complete, click the **Close** button  to return to the search tab. Tick the box marked Inventory and all available Databases. (This searches databases for all available structures; not for catalogue items). You may choose to search by exact structure, similarity, or substructure. Then click the Search icon 

Structure Search Favorites Search Shopping Cart Requisition Search Orders Receiving Materials

Search Inventory Clear Column Settings Print

Criteria List Logic

Entire Database Current Results

Chemical structure: C1=CC=C(N)C=C1

SUBSTRUCTURE (4, 2) %

Normal Super Sub

Criterion	ID	Value
mol.formula	4	
cas	4,2	
mol.name	4,2	
mdl	2	

ID	Database	Search
2	eMolecules	<input checked="" type="checkbox"/>
4	Hosted Catalogs	<input checked="" type="checkbox"/>

Return Selected Select All

No Structures Available

SOURCE: mol.name: SOURCE: mol.name: SOURCE: mol.name:

The structures returned are those of containers in the inventory that you are able to view. You can change the number of results per page in the bottom right corner. Select any structures you want to see containers of, then click **Return Selected**.

Structure Search Favorites Search Shopping Cart Requisition Search Orders Receiving Materials

Search Inventory Clear Column Settings Print

Criteria List Logic

Entire Database Current Results

Chemical structure: C1=CC=C(N)C=C1

SUBSTRUCTURE (4, 2) %

Normal Super Sub

Criterion	ID	Value
mol.formula	4	
cas	4,2	
mol.name	4,2	
mdl	2	
mol.weight	4	

ID	Database	Search
2	eMolecules	<input checked="" type="checkbox"/>
4	Hosted Catalogs	<input checked="" type="checkbox"/>

Name	Session Saved	Databases	Results
Search 1	<input type="checkbox"/>	2,4	1
Search 2	<input type="checkbox"/>	2,4	1
Search 3	<input type="checkbox"/>	2,4	2
Search 4	<input type="checkbox"/>	2,4	83

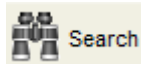
Return Selected Unselect All

Results Filtered by Inventory based on your Preferred Sources

Chemical structures and source information (e.g., SOURCE 4, mol.name: 4,4-Dimethyl-2,2-...)

Single Cols 7 Rows 4

The Search Tab will open. Select the radio buttons under Pref. for Inventory and Storage Areas to search for items in your preferred sources. Click the Search icon



Bar Code	Label	Common Name	CAS #	Current Amount	Units	Location	Expiration Date	Brand
UOAM000000...	Isoniazid	Isoniazid	54-85-3	50	G	Sector 500 Grafton+5...	02-Sep-2020	Sigma
UOAM000023...	Isoniazid	Isoniazid	54-85-3	50	G	Sector 500 Grafton+5...	02-Sep-2020	Fluka
UOAM000025...	Isonicotinamide	Isonicotinamide	1453-82-3	250	G	Sector 500 Grafton+5...	02-Sep-2020	Sigma
UOAM000005...	5-Nitrosoquinoline	5-Nitrosoquinoline	607-32-9	1000	G	Sector 500 Grafton+5...	02-Sep-2020	Combi-Blocks

3 Shopping Cart processes

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

- **Hosted Catalogues and e-Molecules**
- **Non-Hosted Catalogues**
- **Stock Rooms**

3.1 Hosted Catalogue and e-Molecule processes


Researchers who shop through the Hosted Catalogues or e-Molecules use the following steps to create a request.

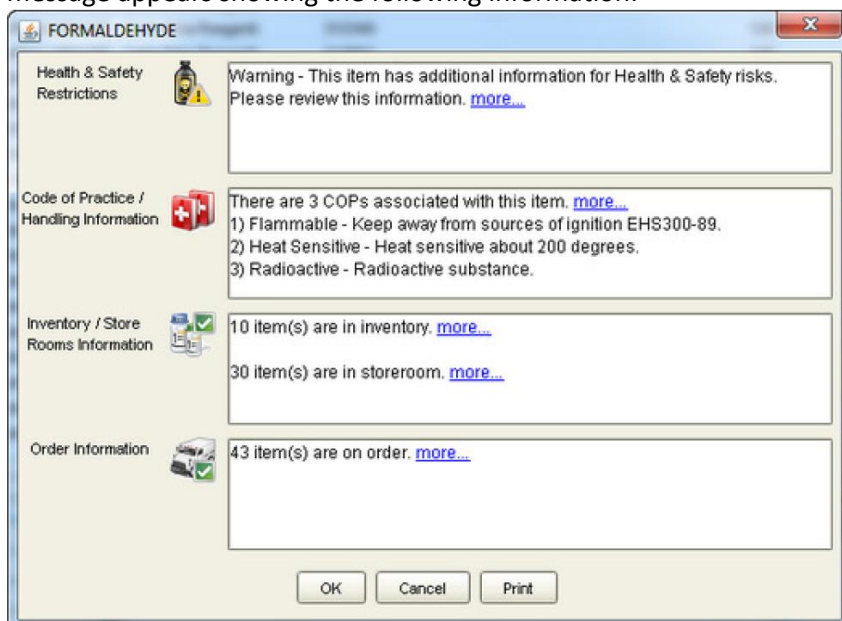
- **Search** for required item in the **Search tab**
- **Add** item to the Shopping Cart
- **Complete** the Shopping Cart
- **Save and Email** the Shopping Cart, with correct documentation where required, to your DLP
- **Order Arrives**

3.1.1 Searching for Items

Once you have found the item(s) in the **Search Tab** you then create a requisition in the form of a Shopping Cart.

3.1.2 Adding Materials to the Shopping Cart

Add the material to the Shopping Cart **Click** on the  icon next to the material. A consolidated message appears showing the following information:




Clicking the [more](#) link opens a .pdf report with detailed information regarding that specific section.

Clicking the Print button opens a .pdf page containing the complete report of all sections.

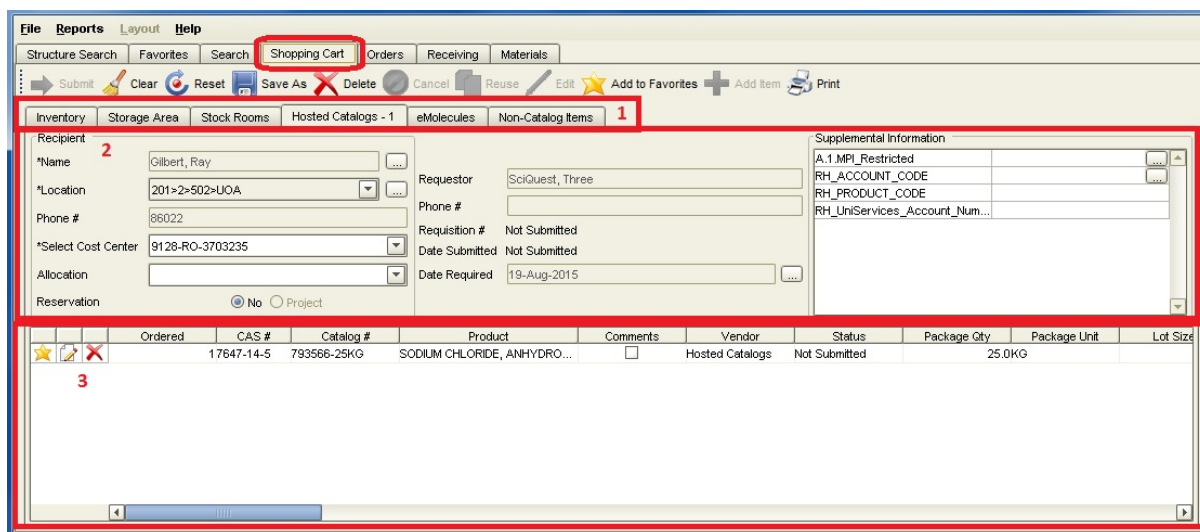
Click the **OK** button to complete the addition of the material to the shopping cart and repeat to add all the required materials into a single Shopping Cart.

Note: All materials in the Shopping Cart need to be from a single supplier. You need to create separate Shopping Carts for materials from each different supplier.

Quick Tip: If the material is a frequent order, click the yellow star  to add this to the **Favourites Tab**

3.1.3 Completing the Shopping Cart

To complete the Shopping Cart, Click the **Shopping Cart Tab**.



The **Shopping Cart** tab has three components:

- (1) The source sub-tabs
- (2) Requisition header
- (3) Requisition line items

Information will need to be filled out in the requisition header and requisition line items to complete the shopping cart order.

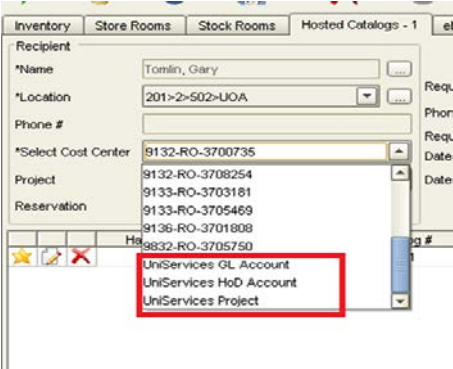
3.1.3.1 Requisition Header

The requisition header contains information about the requester, recipient, payment/allocation/reservation options and configurable “supplemental information”. Required fields are indicated with an asterisk (*).

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

You can only select one Cost Centre per cart.



Panel	Field Name	Description
Recipient	*Name <input type="text"/>	<p>Displays the name of the recipient of the requested items. Defaults to the name of the current user.</p> <p>Clicking the <input type="text"/> button opens the Select a Recipient dialogue box; enter the recipient's last name, click the search button; make the selection and press OK.</p> <p>DLPs may be the recipient of orders placed in SciQuest ERM, but the ownership of all barcoded items must be transferred to the Principal Investigator once the items are received. The Principal Investigator owns the ordered materials and has health and safety accountability.</p>
	Location <input type="text"/>	<p>The delivery location for the request.</p> <p>The default location of the recipient will be displayed once the recipient is selected. If required, the location can be changed by selecting from the dropdown menu. If your desired delivery address does not show please email SciQuest@auckland.ac.nz.</p>
	Phone #	<p>Displays the recipient's telephone number.</p> <p><i>This field is not editable.</i></p>
	Select Cost Center	<p>The cost centre the order will be billed to. The drop-down list is populated with the recipient's cost centres.</p> <p>University of Auckland: The Cost Centre code is required for PeopleSoft Financials accounting purposes.</p> <p>UniServices: Three cost centre codes specific to UniServices are available.</p>  <p>When a UniServices cost centre code is selected, it is also necessary to supply the UniServices account number. (see Supplemental Information section)</p> <p>You can only select one Cost Centre per cart.</p>




Panel	Field Name	Description								
Requestor/Dates	Requestor	Displays the name of the user creating the request. <i>This field is not editable.</i>								
	Phone #	Displays the phone number of the user creating the request. <i>This field is not editable.</i>								
	Requisition #	Displays the ERM requisition number, once the request has been submitted. <i>This field is not editable.</i>								
	Date Submitted	Displays the date when the request was submitted. <i>This field is not editable.</i>								
	Date Required <input type="button" value="..."/>	This field should not be changed as it has no effect on order processing times.								
Supplemental Information	MPI Restricted <input type="button" value="..."/>	<p>Indicate whether the requested item is MPI restricted.</p> <p>This field defaults to true. If the material is <u>not</u> MPI restricted Click the <input type="button" value="..."/> button and select false.</p> <p>If items in the same shopping cart have different MPI Restricted status, they need to be modified individually at the requisition line items level.</p> <p>If all items have the same MPI Restricted status, they do not need to be modified individually at the requisition line items level.</p>								
	RH_ACCOUNT_CO DE*	<p>Displays the PeopleSoft Financials account code this University of Auckland order will be charged to:</p> <table border="1"> <tbody> <tr> <td>775020</td> <td>Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases</td> </tr> <tr> <td>775040</td> <td>Consumables - Lab/Workshop</td> </tr> <tr> <td>775070</td> <td>Consumables - Health and Safety</td> </tr> <tr> <td>775095</td> <td>Consumables – haz chems/restricted biols/radionuclides/vet meds</td> </tr> </tbody> </table> <p>This value can be overridden at the item line level to adjust the account code an item will be charged to.</p>	775020	Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases	775040	Consumables - Lab/Workshop	775070	Consumables - Health and Safety	775095	Consumables – haz chems/restricted biols/radionuclides/vet meds
775020	Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases									
775040	Consumables - Lab/Workshop									
775070	Consumables - Health and Safety									
775095	Consumables – haz chems/restricted biols/radionuclides/vet meds									


Panel	Field Name	Description							
Supplemental Information (cont)	RH_PRODUCT CODE*	<p>Displays the PeopleSoft Financials product code (optional) this University of Auckland order will be charged to.</p> <p>This value can be overridden at the item line level to adjust the product code an item will be charged to.</p>							
	RH_UniServices_Account_Number*	<p>Displays the Technology One account number this UniServices order will be charged to.</p> <p>This field must be populated when a UniServices cost centre code has been selected and must be in the appropriate format:</p> <table border="1"> <thead> <tr> <th>Cost Centre</th> <th>Format of RH_UniServices_Account_Number</th> </tr> </thead> <tbody> <tr> <td>UniServices GL Account (Only used by UniServices Operating Centres)</td> <td>99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.</td> </tr> <tr> <td>UniServices HOD Account</td> <td>99999 (a five digit code)</td> </tr> <tr> <td>UniServices Project</td> <td>99999.999 (a five digit code with a 3 digit suffix)</td> </tr> </tbody> </table> <p>This value can be overridden at the item line level to adjust the account number an item will be charged to.</p>	Cost Centre	Format of RH_UniServices_Account_Number	UniServices GL Account (Only used by UniServices Operating Centres)	99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.	UniServices HOD Account	99999 (a five digit code)	UniServices Project
Cost Centre	Format of RH_UniServices_Account_Number								
UniServices GL Account (Only used by UniServices Operating Centres)	99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.								
UniServices HOD Account	99999 (a five digit code)								
UniServices Project	99999.999 (a five digit code with a 3 digit suffix)								

3.1.3.2 Requisition Line Items

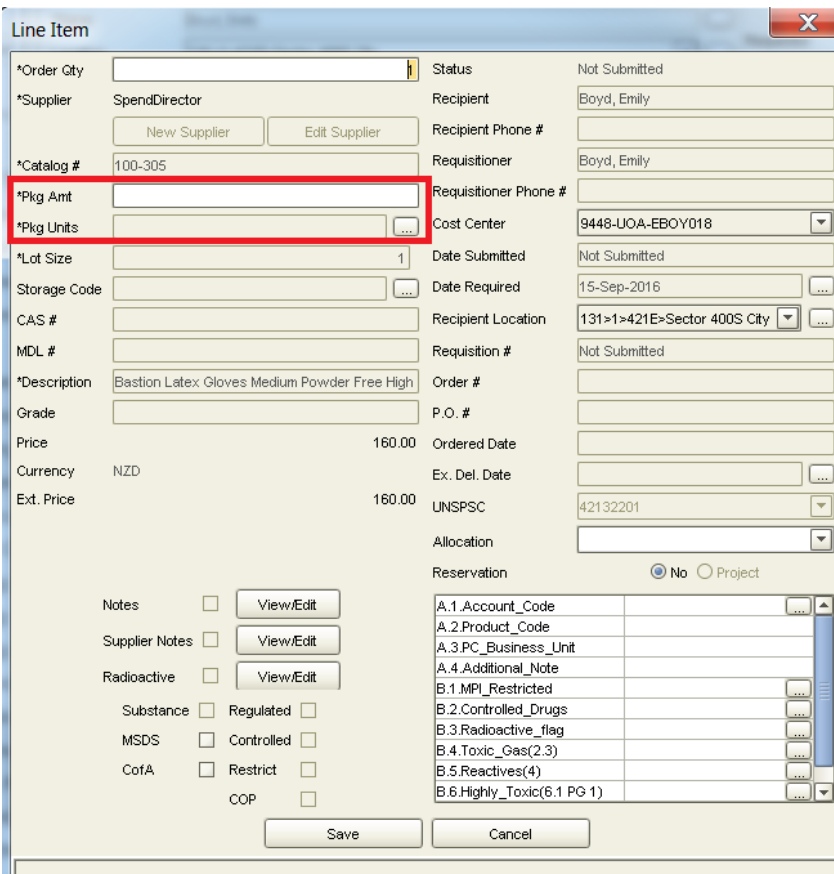
The requisition line items displayed the individual items being requested

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	

Button / Field	Description
Mark Item as Favorite 	Marks the selected item as a 'Favorite'.
Edit Item 	Opens the Line Item dialog for the selected item
Delete Item 	Removes the selected item from the order set
Ordered	Editable field that contains the quantity of the item to be requested. <i>The default Ordered Quantity is '1'.</i>

Open the Line item dialog by clicking on the  icon to check and edit requested item(s). Most of the line item information will be automatically populated from the Hosted Catalogue, but sometimes the Package Amount and Package Unit are missing and you will need to input this manually.

Required fields are indicated with an asterisk (*).





Please note that the cost centre selected in the Requisition header will apply to all line items, regardless of any cost centres selected at the line item level.

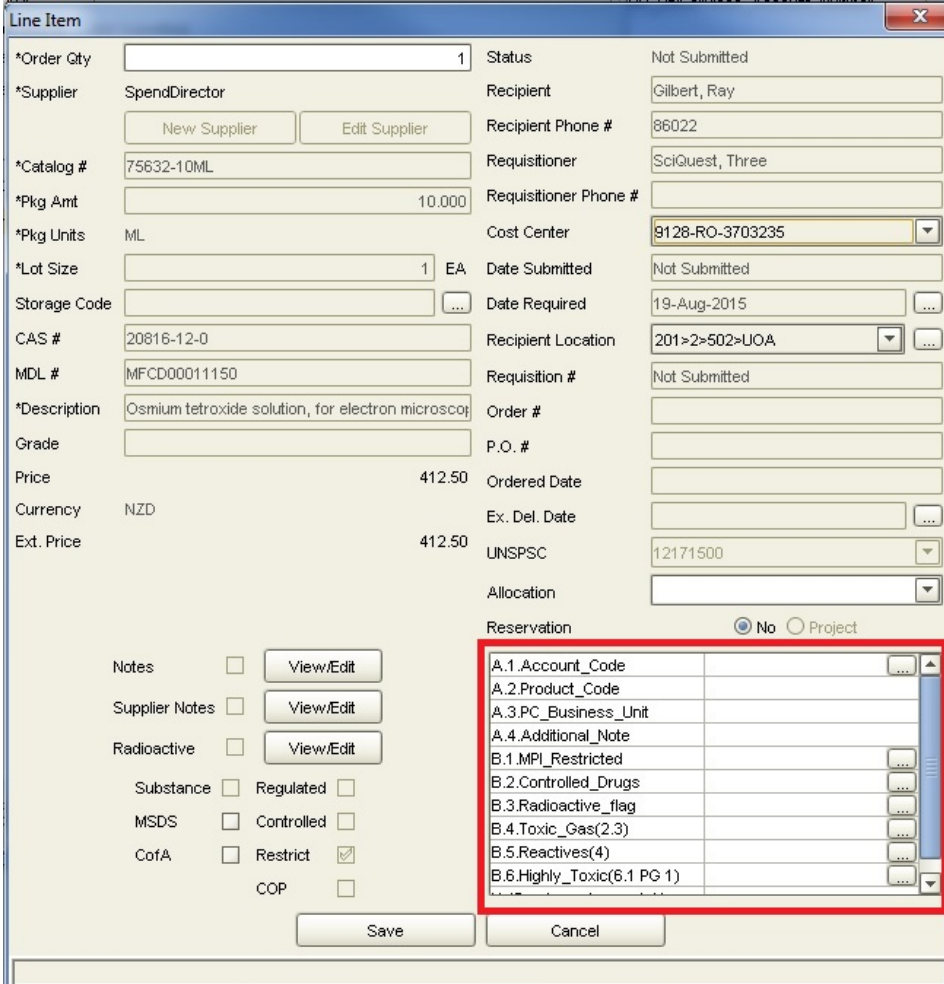
3.1.3.3 Special Requirements for Restricted or Hazardous materials

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 pencil to open the line for editing. 

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



The screenshot shows the 'Line Item' dialog box with the following fields and values:

*Order Qty	1	Status	Not Submitted
*Supplier	SpendDirector	Recipient	Gilbert, Ray
	<input type="button" value="New Supplier"/> <input type="button" value="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	<input type="button" value="..."/>	Date Required	19-Aug-2015 <input type="button" value="..."/>
CAS #	20816-12-0	Recipient Location	201=2>502>UOA <input type="button" value="..."/>
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	<input type="button" value="..."/>
Ext. Price	412.50	UNSPSC	12171500
		Allocation	<input type="button" value="..."/>
		Reservation	<input checked="" type="radio"/> No <input type="radio"/> Project

Notes
Supplier Notes
Radioactive
Substance Regulated
MSDS Controlled
CofA Restrict
COP

The restriction list is highlighted with a red box:

A.1.Account_Code	<input type="button" value="..."/>
A.2.Product_Code	
A.3.PC_Business_Unit	
A.4.Additional_Note	
B.1.MPI_Restricted	<input type="button" value="..."/>
B.2.Controlled_Drugs	<input type="button" value="..."/>
B.3.Radioactive_flag	<input type="button" value="..."/>
B.4.Toxic_Gas(2.3)	<input type="button" value="..."/>
B.5.Reactives(4)	<input type="button" value="..."/>
B.6.Highly_Toxic(6.1 PG 1)	<input type="button" value="..."/>

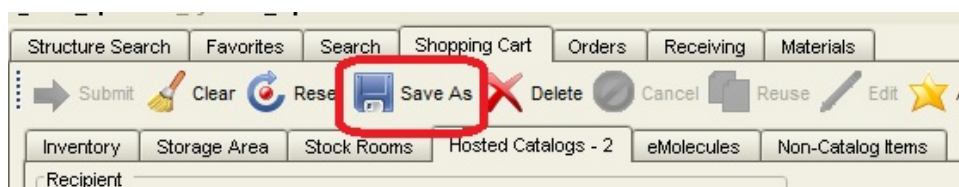
Press **Save** to return to the **Shopping Cart** tab.

3.1.4 Saving the Shopping Cart and Emailing your DLP

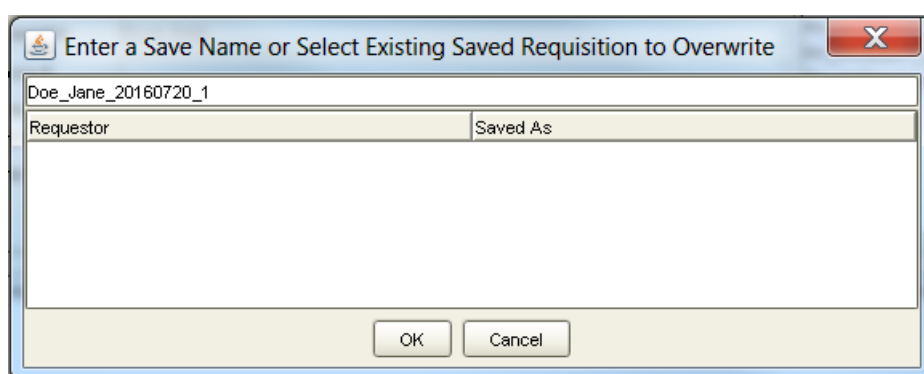
Once all the information in the requisition is checked and correct, the Shopping Cart can be saved.

- **Saving the Shopping Cart**

Click the **Save As** button.

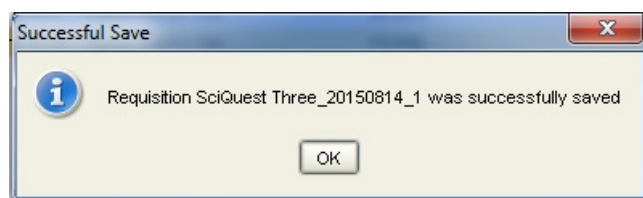


The dialogue window **Enter your Save Name or Select Existing Saved Requisitions to Overwrite** appears and prompt you to save and name your requisition.



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.

- **Emailing your DLP**

The DLP will review your Shopping Cart and pass on to STC or Uniservices for processing.

If there is an issue with the Shopping Cart the DLP advises you to remedy and resend. The DLP works with you to ensure that appropriate materials are being requested.

Note: The email must have the following

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

Quick Tip: Once you have closed the Shopping Cart you are not able to add anything to it so **Click Reset** button to make another Shopping Cart.

3.1.5 Order Arrives

Once the Shopping Cart has been processed by STC or UniServices it becomes an Order. When the Order arrives it will be received and checked into the SciQuest ERM. The DLP determines where the items are to be located.

3.2 Non-Hosted Catalogue processes

You can still purchase a material when it is not found in Hosted catalogues through Non-Hosted Catalogue suppliers. You may also use this process to order from Hosted catalogue suppliers if the item you require is not shown in the catalogue. In cases where the Supplier is not found in the Non-Hosted catalogue then a formal process to establish the Supplier must be undertaken with the STC.

Researchers who shop through the Non-Hosted catalogue use the following steps to create a Shopping Cart.

- **Add** item to the Shopping Cart
- **Complete** the Shopping Cart
- **Save and Email** the Shopping Cart name, with correct documentation where required, to your DLP
- **Order arrives**

Note: Non-Hosted Catalogue items cannot be added to the Favourites tab. However if you place the same order often, you can find your previous requisition in the Requisition Search tab and click the plus sign to “Copy As New” which will duplicate the order.

3.2.1 Non-Hosted Catalog Items Tab

Go to the **Shopping Cart** tab and **Select** the **Non-Catalog items** sub-tab (2).

Complete the required fields in the Requisition Header.

The screenshot shows the SciQuest ERM interface. The 'Shopping Cart' tab is selected, and the 'Non-Catalog Items' sub-tab is active. The Requisition Header form is displayed, with the following fields and values:

Field	Value
*Name	SciQuest, Three
*Location	B061>5>301>UOA - City C...
Phone #	
*Select Cost Center	UniServices GL Account
Allocation	
Reservation	<input checked="" type="radio"/> No <input type="radio"/> Project
Requestor	SciQuest, Three
Phone #	
Requisition #	Not Submitted
Date Submitted	Not Submitted
Date Required	19-Aug-2015

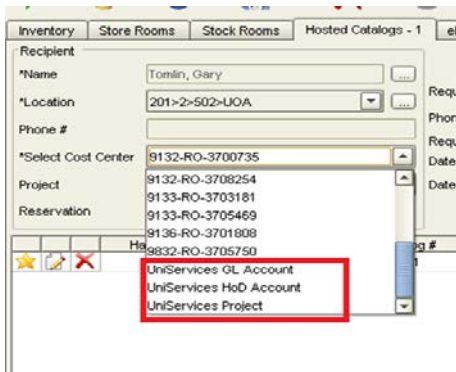
The Supplemental Information table is also visible:




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

The requisition header contains information about the requester, recipient, payment/allocation/reservation options and configurable “supplemental information”. Required fields are indicated with an asterisk (*).

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

You can only select one Cost Centre per cart.

Panel	Field Name	Description
Recipient	*Name <input type="text"/>	<p>Displays the name of the recipient of the requested items. Defaults to the name of the current user.</p> <p>Clicking the <input type="text"/> button opens the Select a Recipient dialogue box; enter the recipient's last name, click the search button; make the selection and press OK.</p> <p>DLPs may be the recipient of orders placed in SciQuest ERM, but the ownership of all barcoded items must be transferred to the Principal Investigator once the items are received. The Principal Investigator owns the ordered materials and has health and safety accountability.</p>
	Location <input type="text"/>	<p>The delivery location for the request.</p> <p>The default location of the recipient will be displayed once the recipient is selected. If required, the location can be changed by selecting from the dropdown menu. If your desired delivery address does not show please email SciQuest@auckland.ac.nz..</p>
	Phone #	<p>Displays the recipient's telephone number.</p> <p><i>This field is not editable.</i></p>
	Select Cost Center	<p>The cost centre the order will be billed to. The drop-down list is populated with the recipient's cost centres.</p> <p>University of Auckland: The Cost Centre code is required for PeopleSoft Financials accounting purposes.</p> <p>UniServices: Three cost centre codes specific to UniServices are available.</p>  <p>When a UniServices cost centre code is selected, it is also necessary to supply the UniServices account number. (see Supplemental Information section)</p>

Panel	Field Name	Description								
Requestor/Dates	Requestor	Displays the name of the user creating the request. <i>This field is not editable.</i>								
	Phone #	Displays the phone number of the user creating the request. <i>This field is not editable.</i>								
	Requisition #	Displays the ERM requisition number, once the request has been submitted. <i>This field is not editable.</i>								
	Date Submitted	Displays the date when the request was submitted. <i>This field is not editable.</i>								
	Date Required 	This field should not be changed as it has no effect on order processing times.								
Supplemental Information	MPI Restricted 	Indicate whether the requested item is MPI restricted. This field defaults to true . If the material is <u>not</u> MPI restricted Click the  button and select false . If items in the same shopping cart have different MPI Restricted status, they need to be modified individually at the requisition line items level. If all items have the same MPI Restricted status, they do not need to be modified individually at the requisition line items level.								
	RH_ACCOUNT_CODE*	Displays the PeopleSoft Financials account code this University of Auckland order will be charged to: <table border="1" data-bbox="699 1261 1490 1536"> <tbody> <tr> <td>775020</td> <td>Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases</td> </tr> <tr> <td>775040</td> <td>Consumables - Lab/Workshop</td> </tr> <tr> <td>775070</td> <td>Consumables - Health and Safety</td> </tr> <tr> <td>775095</td> <td>Consumables – haz chems/restricted biols/radionuclides/vet meds</td> </tr> </tbody> </table> <p>If the required code is not in the dropdown list, please leave this field blank and let the STC know what the code should be when you submit your order through the STC portal.</p>	775020	Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases	775040	Consumables - Lab/Workshop	775070	Consumables - Health and Safety	775095	Consumables – haz chems/restricted biols/radionuclides/vet meds
775020	Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases									
775040	Consumables - Lab/Workshop									
775070	Consumables - Health and Safety									
775095	Consumables – haz chems/restricted biols/radionuclides/vet meds									




Panel	Field Name	Description							
Supplemental Information (cont)	RH_PRODUCT_CODE *	Displays the PeopleSoft Financials product code (optional) this University of Auckland order will be charged to.							
	RH_UniServices_Account_Number*	<p>Displays the Technology One account number this UniServices order will be charged to.</p> <p>This field must be populated when a UniServices cost centre code has been selected and must be in the appropriate format:</p> <table border="1"> <thead> <tr> <th>Cost Centre</th> <th>Format of RH_UniServices_Account_Number</th> </tr> </thead> <tbody> <tr> <td>UniServices GL Account (Only used by UniServices Operating Centres)</td> <td>99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.</td> </tr> <tr> <td>UniServices HOD Account</td> <td>99999 (a five digit code)</td> </tr> <tr> <td>UniServices Project</td> <td>99999.999 (a five digit code with a 3 digit suffix)</td> </tr> </tbody> </table>	Cost Centre	Format of RH_UniServices_Account_Number	UniServices GL Account (Only used by UniServices Operating Centres)	99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.	UniServices HOD Account	99999 (a five digit code)	UniServices Project
Cost Centre	Format of RH_UniServices_Account_Number								
UniServices GL Account (Only used by UniServices Operating Centres)	99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.								
UniServices HOD Account	99999 (a five digit code)								
UniServices Project	99999.999 (a five digit code with a 3 digit suffix)								

3.2.2 Adding Items to the Shopping Cart

To add items to the Shopping Cart Press the  **Add Item** and a line item dialogue window appears. Complete the required fields. Press **Save** to return to the **Shopping Cart** tab.

Please note that the cost centre selected in the Requisition header will apply to all line items, regardless of any cost centres selected at the line item level.

Button / Field	Description
Order Qty (*)	The desired quantity of the item
Supplier (*) ...	The field displays the supplier from whom the item will be purchased. Clicking the Supplier menu button opens the Select a Vendor dialogue to enable you to select a supplier for the item. Non-catalogue items can only be purchased from suppliers loaded in SciQuest and PeopleSoft Financials. When the supplier is not found in SciQuest, contact the STC to undergo a formal process to set up the supplier.
Catalog # (*)	The supplier's catalogue number for the item
Pkg Amt (*)	The quantity amount for a container of the item.
Pkg Units (*) ...	The unit of measure for a container of the item. Clicking the Pkg Units menu button opens the Select a Unit dialogue to allow you to select the correct package amount unit for the item.


Button / Field	Description
Lot Size (*)	The Lot size of the item; if not otherwise specified, the value defaults to '1'. (The number of containers/items within one package/box of the item) If lot size = 1 then = EA (Each); If lot size > 1 then = CS (case)
Storage Code 	The text description of the storage code for containers of this item. Clicking the Storage Code menu button opens the Storage Code dialogue to the select the value.
CAS #	The CAS number of the item. This must be included for all chemicals.
MDL #	Unique identification number for each chemical reaction and variation
Description (*)	The Common Name or the item. This value is typically also used for the container label when the item is received.
Price (*)	The price of the item; accepts 2 decimal places
Currency (*)	Currency used
Cost Center	Please note that the cost centre selected in the Requisition header will apply to all line items, regardless of any cost centres selected at the line item level.
Date Required 	This field should not be changed as it has no effect on order processing times.
Recipient Location 	The location the order item should be delivered to. Clicking the Recipient Location menu button opens the Select a Location dialogue to allow you to select a recipient location not already displayed in the drop-down list. <i>The drop-down list is populated with the recipient's Preferred Delivery Location entries (from the Preferences > User Preferences dialogue). Use the Select a Location dialogue's navigation tree to select a location or sublocation not included in the drop-down list.</i>

**Item flex fields
(panel)**

A.1.Account_Code	
A.2.Product_Code	
A.3.PC_Business_Unit	
A.4.Additional_Note	
B.1.MPI_Restricted	
B.2.Controlled_Drugs	
B.3.Radioactive_flag	
B.4.Toxic_Gas(2.3)	
B.5.Reactives(4)	
B.6.Highly_Toxic(6.1 PG 1)	

It is compulsory to declare 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 (UN6.1 PG1)

If the requested item is one of the above, click the  next to the appropriate list and change the status to true.

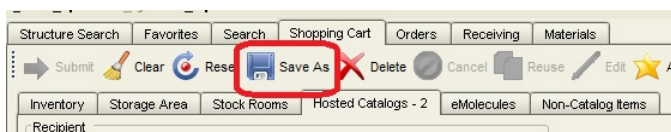
Please note that the Account code and Product code selected in the Requisition header will apply to all line items, regardless of any codes selected at the line item level.

3.2.3 Saving the Shopping Cart and Emailing your DLP

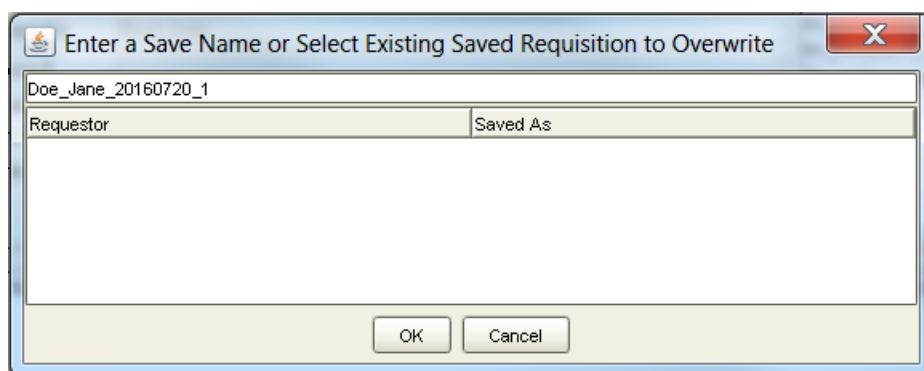
Once all the information in the Shopping Cart is checked and correct, the Shopping Cart can be saved.

- **Saving the Shopping Cart**

Click the **Save As** button.

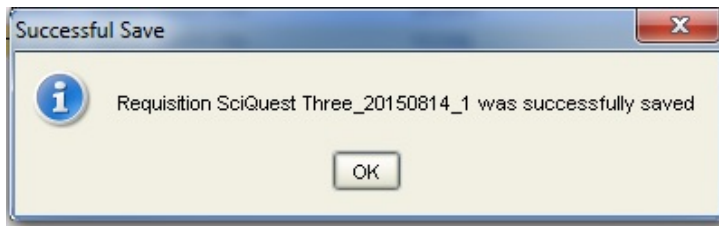


The dialogue window **Enter your Save Name or Select Existing Saved Requisitions to Overwrite** appears and prompt you to save and name your Shopping Cart.



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.

- **Emailing your DLP**

The DLP will review your Shopping Cart and pass on to STC or Uniservices for processing. If there is an issue with the Shopping Cart the DLP advises you to remedy and resend. The DLP works with you to ensure that appropriate materials are being ordered.

Note: The email must have the following

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

Quick Tip: Once you have closed the Shopping Cart you are not able to add anything to it so **Click Reset** button to make another Shopping Cart

3.2.4 Order Arrives

Once the Shopping Cart has been processed by STC or Uniservices it becomes an Order. When the Order arrives it will be received and checked into the SciQuest ERM. The DLP determines where the materials are to be located.

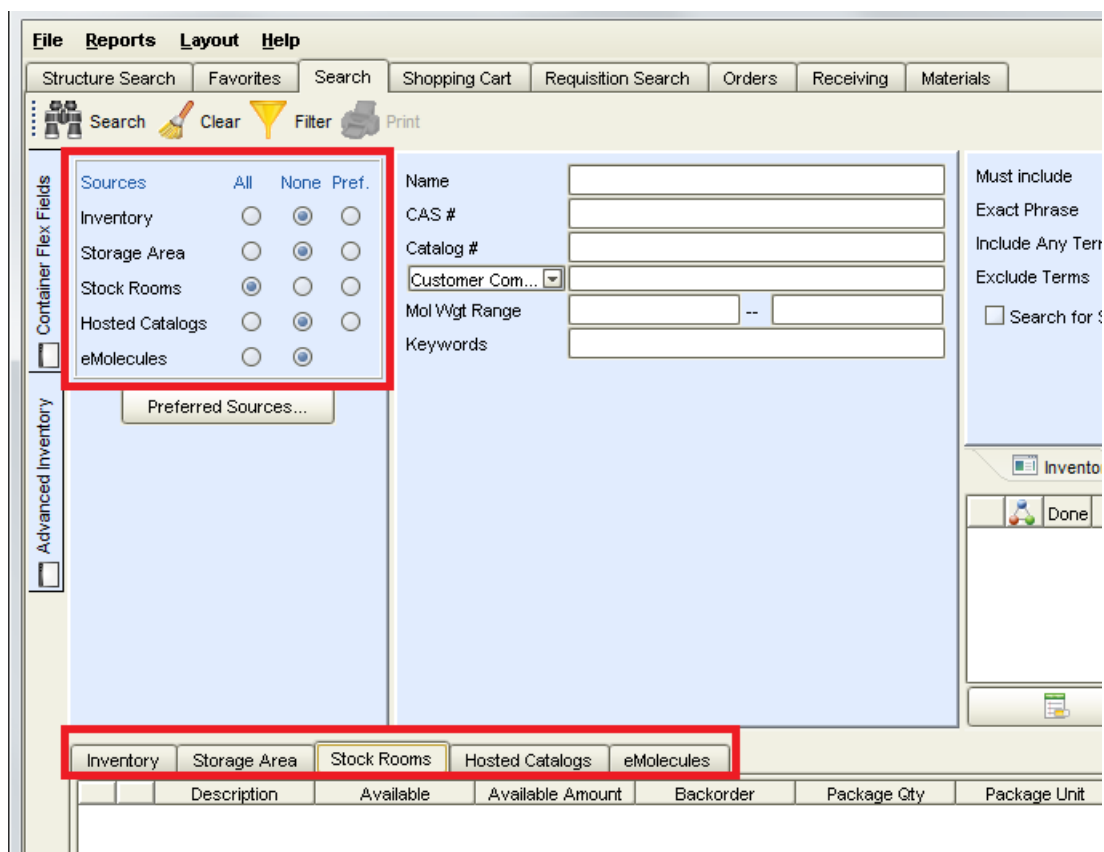
3.3 Stock Room processes

All users are able to purchase through the stockroom they are allocated to and should use the following steps to create a request.


- **Search** for required item in the **Search Tab**
- **Add** item to the Shopping Cart
- **Complete** the Shopping Cart
- **Order is Ready**

3.3.1 Searching for an Item

In the Search Tab, select the Stock Room 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.



3.3.2 Adding Items to the Shopping Cart


Add items to the Shopping Cart by **Clicking** on the  icon next to the item. If there are warnings associated with the material, a message appears showing the following information:



Clicking the more links opens a .pdf report with detailed information regarding that specific section.

Clicking the Print button opens a .pdf page containing the complete report of all sections.

Clicking the **OK** button completes the addition of the material to the Shopping Cart. Repeat to add all the required materials into a single Shopping Cart.


Quick Tip: If the material is a frequent order, click the yellow star  to add this to the **Favourites Tab**

3.3.3 Completing the Shopping Cart

Complete the Shopping Cart by clicking the **Shopping Cart** tab and going to the **Stock Rooms** tab.

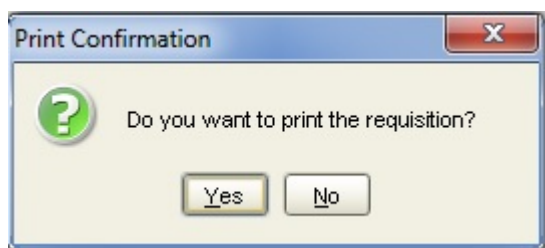
Fill out the information in the requisition header. The quantity can be changed under the “Ordered” column.

Extra codes: If you need to specify a UniServices project code, an Account Code, or a Product Code; right click on the item in your shopping cart and click ‘View/Add notes’. Put the extra code(s) in here.

Press the **Submit** button  and a dialogue window confirming that your Shopping Cart has been successfully submitted appears.



Press **OK**. A **Print Confirmation** dialogue window appears asking if you want to print the requisition.



Clicking Yes generates a “Stockroom Requisition Form” in pdf format which is a record of your request.

3.3.4 Order is Ready

Once the Shopping Cart has been processed it is handled by a Stock Room person. Any items with barcodes need to be receipted into their lab location with a scanner in the Stock Room.

4 Working with Materials

As a Researcher you may need to search for, view and create a new material (e.g. newly created chemicals, newly created genetically modified organisms).

4.1 Searching for Materials


Researchers can search for materials using the **Materials Tab**

The Materials Tab has 3 information panes:


- The Text Criteria pane which allows you to enter and select common search criteria (1)
- The Search Results pane which displays materials matching search criteria (2)
- The List Associations pane which displays any regulatory lists that have been associated to the selected material (3)

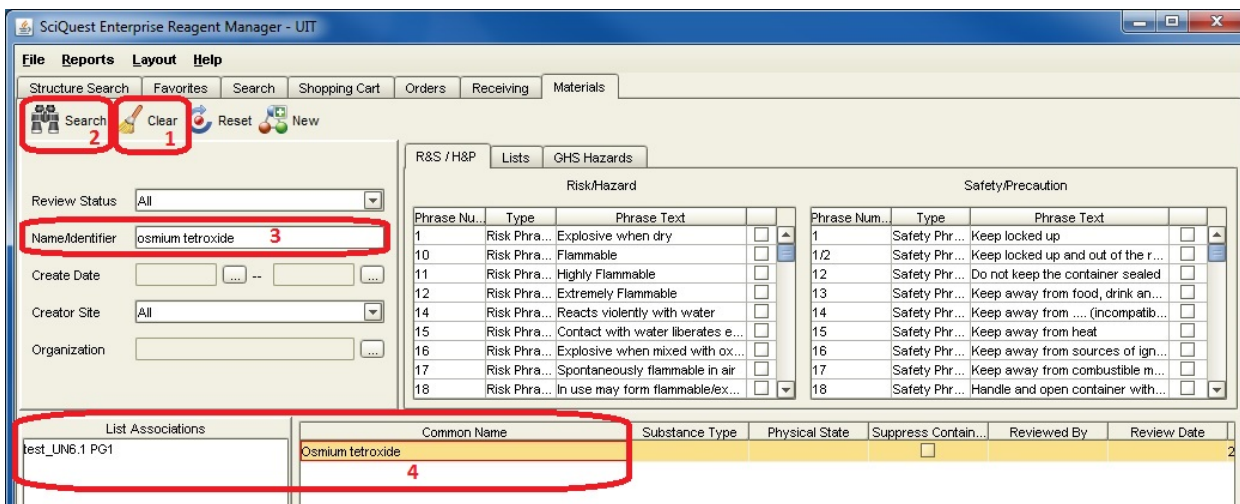
The screenshot shows the 'Materials' tab in the SciQuest ERM software. The interface is divided into three main panes:

- 1. Text Criteria Pane:** Located on the left, it contains search criteria fields: Review Status (dropdown menu), Name/Identifier (text input), Create Date (date range selector), Creator Site (dropdown menu), and Organization (text input).
- 2. Search Results Pane:** Located on the right, it displays a table of Risk/Hazard and Safety/Precaution phrases. The table has columns for Phrase Num., Type, and Phrase Text. The Risk/Hazard section lists phrases like 'Explosive when dry', 'Flammable', 'Highly Flammable', 'Extremely Flammable', 'Reacts violently with water', 'Contact with water liberates e...', 'Explosive when mixed with ox...', 'Spontaneously flammable in air', and 'In use may form flammable/ex...'. The Safety/Precaution section lists phrases like 'Keep locked up', 'Keep locked up and out of the r...', 'Do not keep the container sealed', 'Keep away from food, drink an...', 'Keep away from ... (incompatib...', 'Keep away from heat', 'Keep away from sources of ign...', 'Keep away from combustible m...', and 'Handle and open container with...'. Each row has a checkbox and a dropdown arrow.
- 3. List Associations Pane:** Located at the bottom left, it is currently empty and labeled 'List Associations'.

Begin your search by **Clicking** the **Clear** button  to re-set the search to the default criteria where ALL materials are searched for regardless of their review status and creator site.

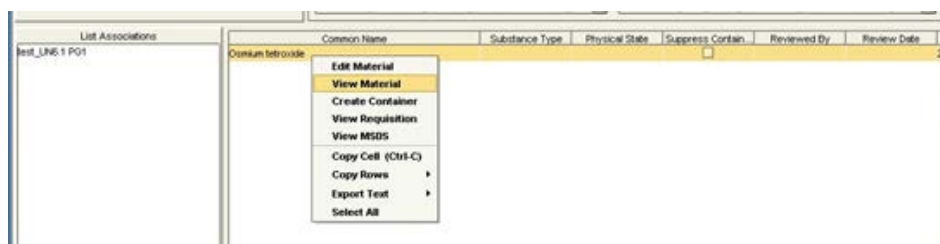
Enter your text (preferably a CAS number) in the Name/Identifier field. You can alternatively search by using a common name, a MDL number, a CAS number or Custom Compound ID. A Wildcard (*) can also be used in this field, and should generally be used if searching by names.

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).

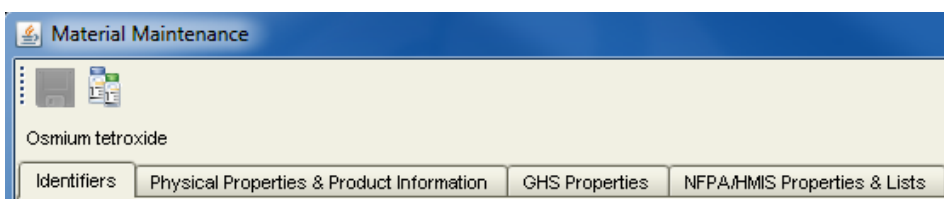


4.2 Viewing materials

More information on your materials can be obtained by **Right Clicking** on a material and selecting the **View Material** option.



This option opens the **Material Maintenance** dialogue window where information on the materials properties is displayed. Information is organised into several tabs:



Identifiers tab

Here general information about the material including ingredients, structures, structure identifiers and synonyms can be found.

Material Maintenance

Osmium tetroxide Material 1 of 1

Identifiers Physical Properties & Product Information GHS Properties NFPA/MSD Properties & Lists

Material Information

Common Name Osmium tetroxide CAS # 20816-12-0
Formula O4Os Creator ERMSUPERUSER, ERMSUPERUSER
Material Source Material Type Physical State
Status Not Reviewed Suppress Container Creation

Ingredients

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

Structure Identifiers

<input checked="" type="checkbox"/>	20816-12-0			
<input checked="" type="checkbox"/>	MPC00011150			
<input checked="" type="checkbox"/>	5050338			

O=S(=O)(=O)=O

Synonyms

Type	Value
Alias	Osmium(VI)oxide
Alias	Osmic acid#2019

Physical Properties & Product information tab

You can find common physical properties for the material and catalogue information (supplier, catalogue#, brand, manufacturer part number) for containers that have been received or created.

Material Maintenance

Osmium tetroxide Material 1 of 1

Identifiers Physical Properties & Product Information GHS Properties NFPA/MSD Properties & Lists

Common Physical Properties

Purity

Storage Code Specific Gravity
Color Code Specific Volume
Flash Point pH
Melting Point 39.5-41 °C(lt) Solubility in Water
Boiling Point 130 °C(lt) Density (Air = 1)
Molecular Weight 254.23 Pressure
Solvent Form

Product Information

Supplier	Catalog #	Brand	Manufacturer Part #
Sigma-Aldrich (Ne...)	291755-SM	SIOMA-ALDRICH	291755
FMTStest			
Sigma-Aldrich (Ne...)	201030-10	SIOMA-ALDRICH	201030
Sigma-Aldrich (Ne...)	75632-10ML	SIOMA-ALDRICH	75632

GHS Properties

Here you can find information on the Standard GHS properties. Signal Word, hazard statements and risk/safety phrases and pictograms are displayed.

The screenshot shows the 'Material Maintenance' window for 'Cumium Nitroside'. The 'GHS Properties' tab is active. The 'Hazard & Precaution Alerts' section contains a table of hazard statements:

Statement Type	Statement #	Statement Text
HSP Hazards	300	Fatal if swallowed.
HSP Hazards	310	Fatal in contact with skin.
HSP Hazards	314	Causes severe skin burns and eye damage.
HSP Hazards	330	Fatal if inhaled.
HSP Hazards	334	May cause allergy or asthma symptoms or breathing difficulties if inhaled.

Below the table are three GHS pictograms: a flame over a circle, a skull and crossbones, and a person with a star on their chest. A 'Danger' signal word is displayed to the right. Further down, 'Health & Environmental Hazards' and 'Physical Hazards' are listed in a grid format.

NFPA/HMIS Properties & Lists

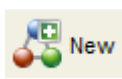
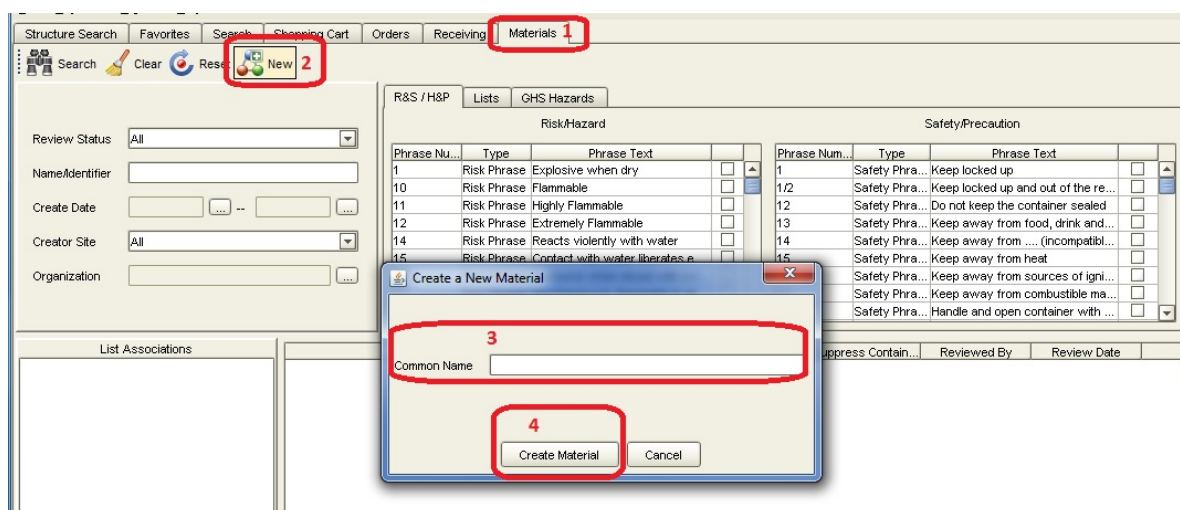
You can find information here on NFPA ratings, HMIS ratings, alerts and associated lists

The screenshot shows the 'Material Maintenance' window for 'Cumium Nitroside'. The 'NFPA/HMIS Properties & Lists' tab is active and highlighted with a red box. The interface is divided into several sections:

- NFPA Properties:** Fire Hazards, Health Hazard Rating, Reactivity, and NFPA Special Notice.
- HMIS Properties:** HMS Fire, HMS Health, HMS Reactivity, and HMS PPE.
- Lists & Alerts:** A section with a 'Health and Safety/COOP' icon and a 'more...' link.
- Risk Associations:** A table with columns for List Name, Restricted I, Severity, and List Type. One entry is visible: 'test_UNB.1.P01' with 'Restricted I' severity.
- Safe Associations:** A table with columns for List Name, Severity, and List Type, currently empty.

4.3 Creating a new Material

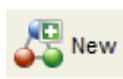
As a Researcher you may want to create a new material. To create new materials go to the **Material** tab. Make sure the material has not already been created by searching for CAS number and/or various common names with wildcards (*) in the Name/Identifier field.



Click the **New** substance icon to open the **Create a New Material** dialogue window

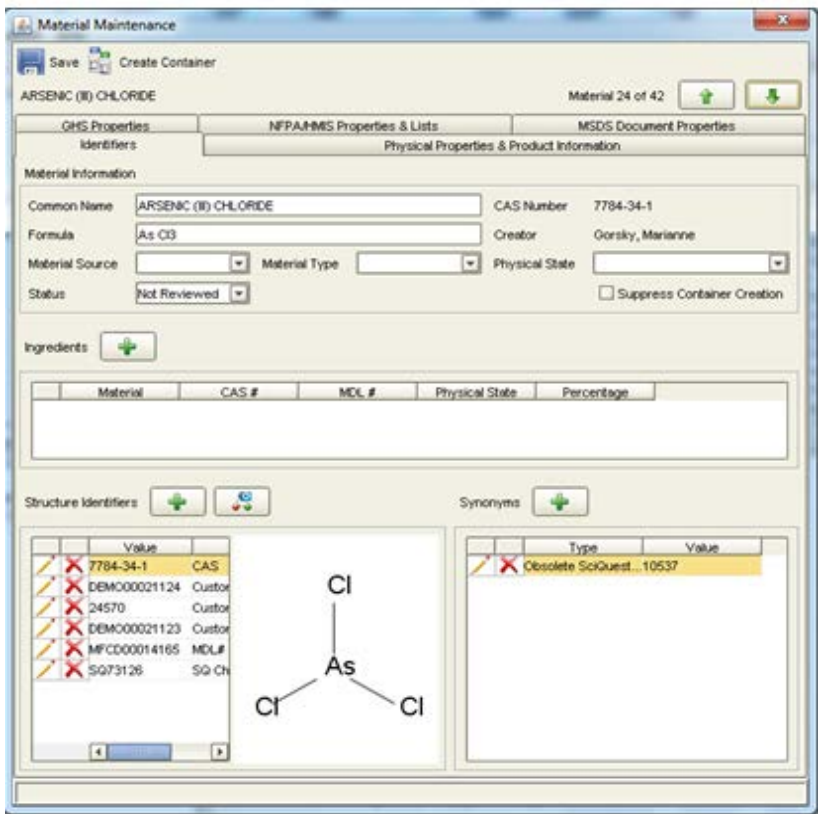
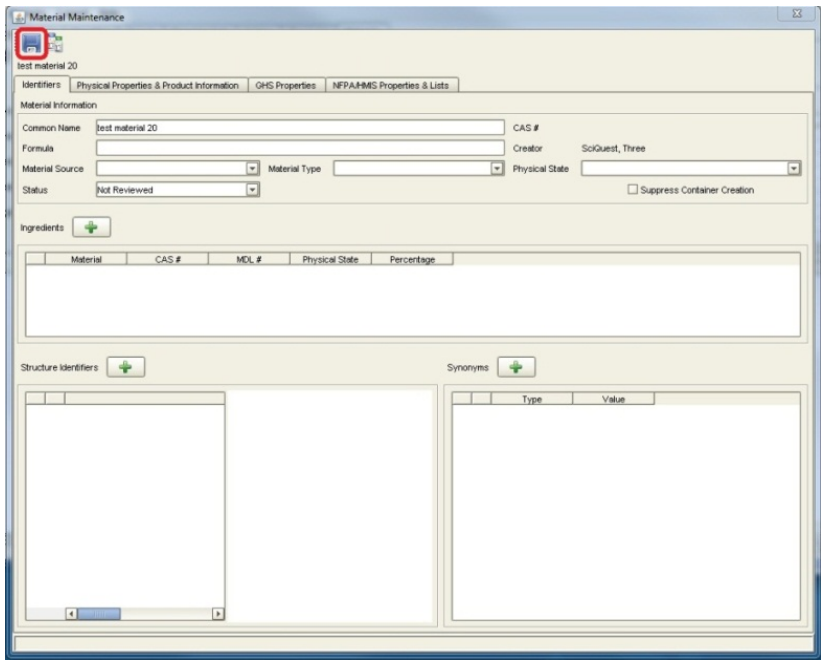
Enter a material common name.

The common name is checked against existing materials, if a duplicate material exists, an error message is displayed.




The **New** substance icon needs to be clicked again and a new name entered in the **Create a New Material** dialogue window.

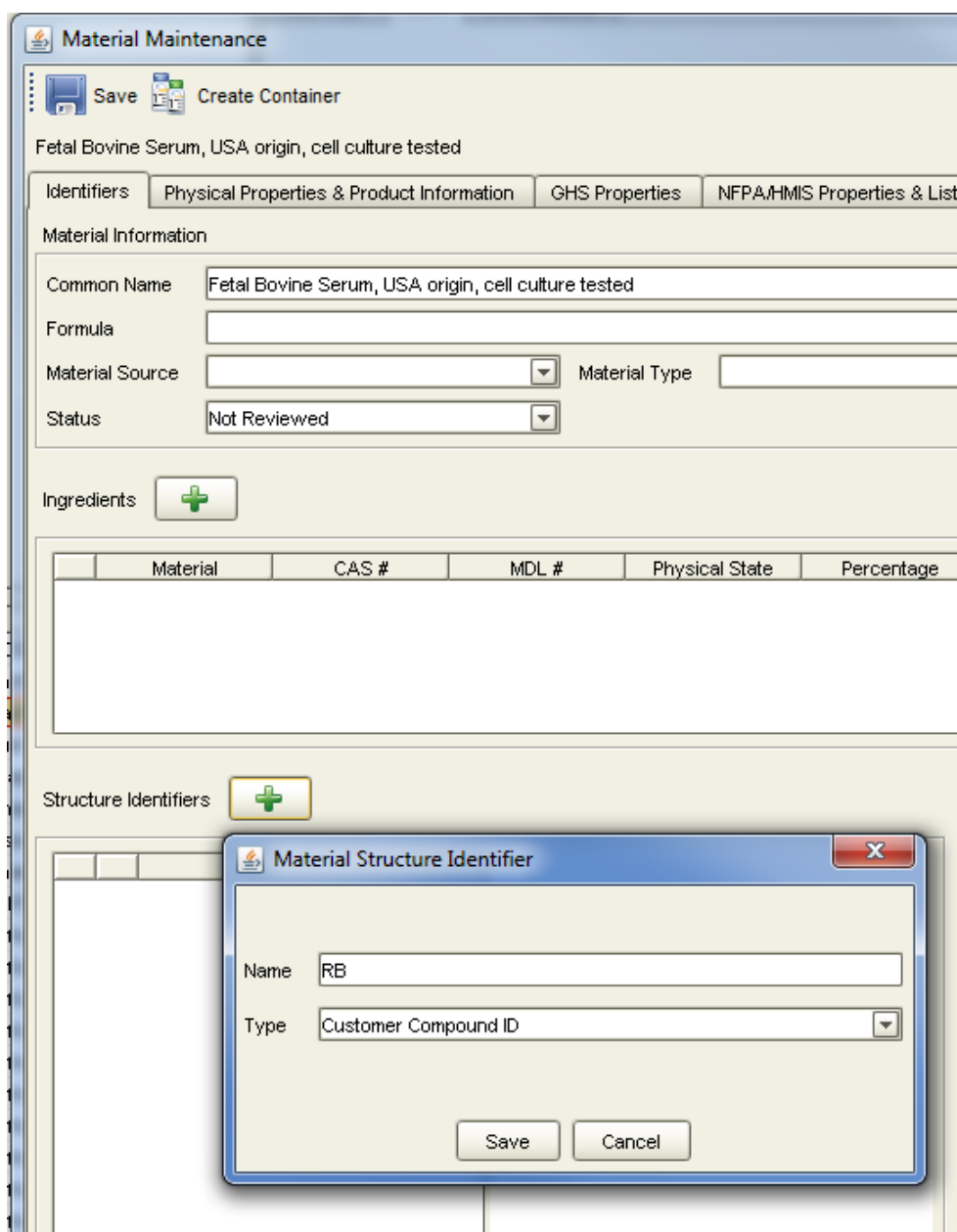
Click the **Create material** button which opens the **Material Maintenance** dialogue window. This is where you can enter information of the new material. Include the CAS number if it exists for the material. Click the **Save** button to save the material.



4.3.1 Creating a new genetically-modified organism (GMO) or restricted biological (RB)

When creating a new genetically-modified organism (GMO) or restricted biological (RB), create the new material as outlined in the above section (Section 4.3 Creating a new Material) **AND** 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. If the item is both a GMO and a RB, repeat the step so the item can have both “GMO” and “RB” as “Customer Compound ID”. Once the material is created, a container of this material should be created (please refer to Section 5.1 Creating a new container).



5 Working with Containers

Note: All container owners must be current Principal Investigators.

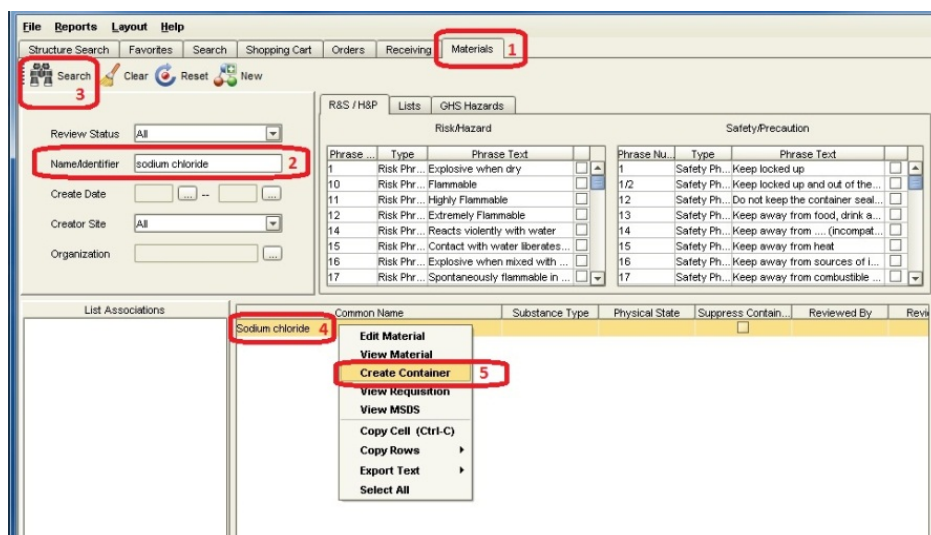
5.1 Creating a new Container

As a Researcher you may want to create a Container. To do this, go to the **Materials** tab.

Enter the text search criteria in Name/Identifier field. It can be a common name, MDL number, CAS number or Custom Compound ID. Wildcard (*) can also be used in this field.

Click the search icon  and **Right Click** the selected material in the result pane

Select the “Create Container” option



The screenshot displays the SciQuest ERM 8.1.1 Researcher Manual interface. The 'Materials' tab is selected, indicated by a red box labeled '1'. The search criteria 'Sodium chloride' is entered in the 'Name/Identifier' field, highlighted with a red box labeled '2'. The search icon is highlighted with a red box labeled '3'. The search results table shows 'Sodium chloride' selected, highlighted with a red box labeled '4'. A context menu is open over the selected material, with the 'Create Container' option highlighted by a red box labeled '5'. The context menu options include: Edit Material, View Material, Create Container, View Requisition, View MSDS, Copy Cell (Ctrl-C), Copy Rows, Export Text, and Select All.

Phrase ...	Type	Phrase Text	Phrase Nu...	Type	Phrase Text
1	Risk Phr ...	Explosive when dry	1	Safety Ph...	Keep locked up
10	Risk Phr ...	Flammable	1/2	Safety Ph...	Keep locked up and out of the...
11	Risk Phr ...	Highly Flammable	12	Safety Ph...	Do not keep the container seal...
12	Risk Phr ...	Extremely Flammable	13	Safety Ph...	Keep away from food, drink a...
14	Risk Phr ...	Reacts violently with water	14	Safety Ph...	Keep away from ... (incompat...
15	Risk Phr ...	Contact with water liberates...	15	Safety Ph...	Keep away from heat
16	Risk Phr ...	Explosive when mixed with ...	16	Safety Ph...	Keep away from sources of i...
17	Risk Phr ...	Spontaneously flammable in ...	17	Safety Ph...	Keep away from combustible ...

A **Container** dialogue window appears

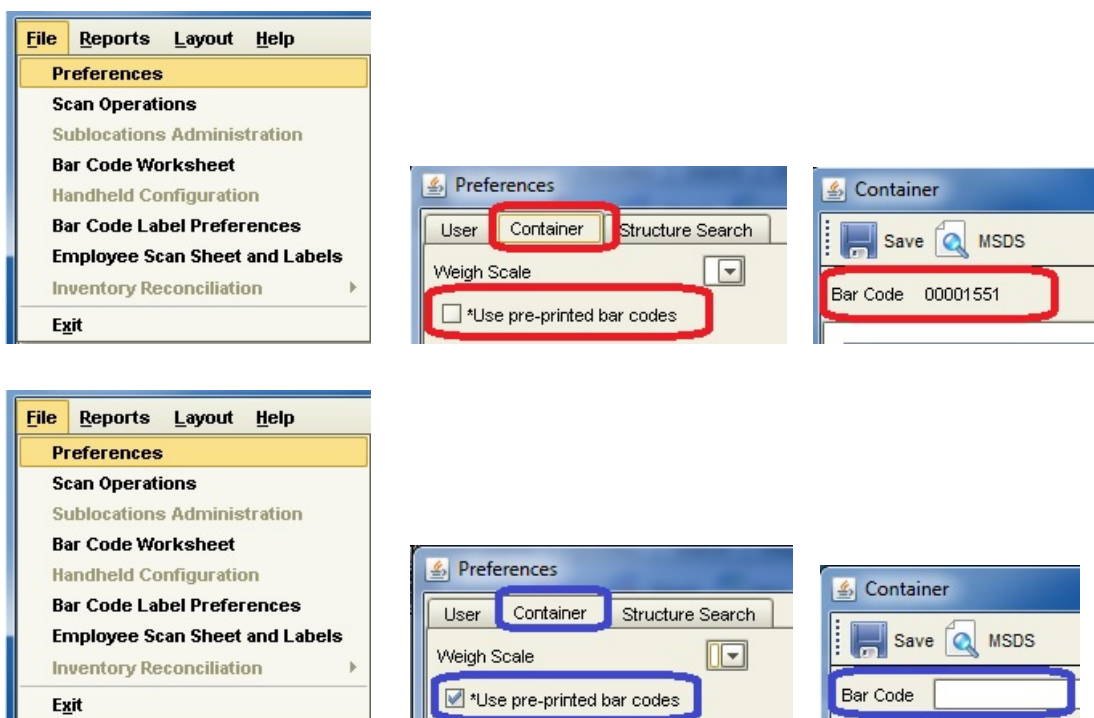
Complete the container information. It is **compulsory** to change the owner to the **Principal Investigator** who will be the responsible owner of the container. Locations of containers are also required.

For MPI restricted items, it is compulsory to enter the following information into SciQuest:

- MPI restricted status (true)
- BACC#
- Document repository ID#
- 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 a newly generated material or GMO created in the University of Auckland.

Depending on your preference settings, either SciQuest ERM automatically generates a Barcode 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).



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

5.1.1 Printing labels for a container

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

Right Click the selected container in the result pane.

Select **Print Bar Codes**

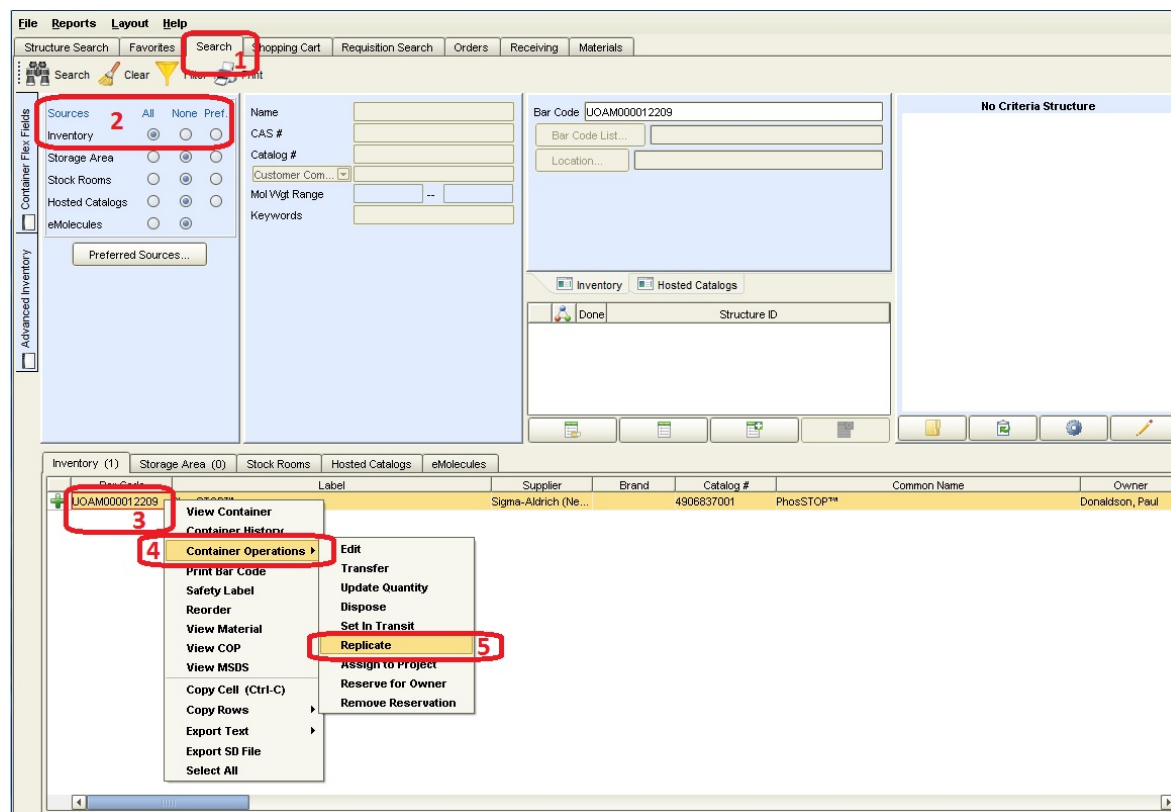
5.2 Replicating an existing container

As a Researcher you may want to replicate an existing container.

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

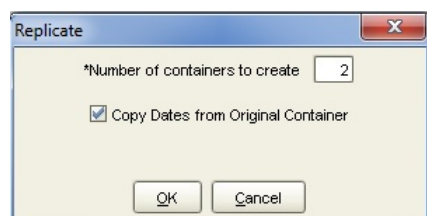
Right Click the selected container in the result pane.

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.



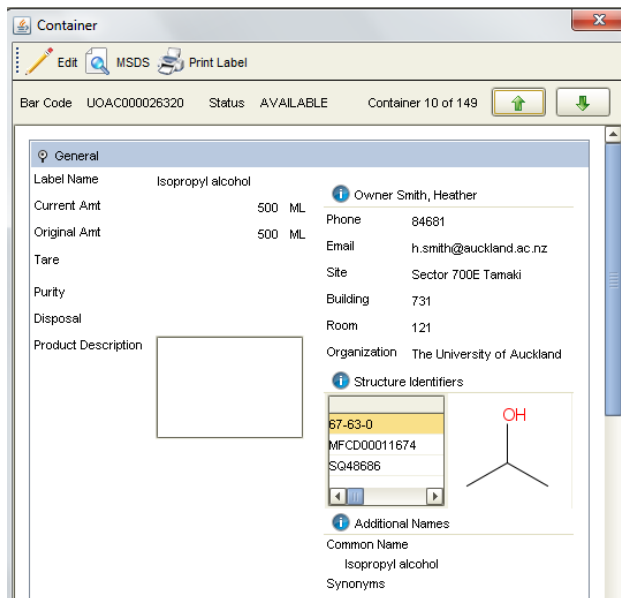
Depending on your preference setting, either SciQuest ERM automatically generates a Barcode(s) for the new container(s) or allows you to scan/enter pre-printed Barcode(s).

5.3 Viewing a container

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

Right Click the selected container in the result pane.

Select **View Container**



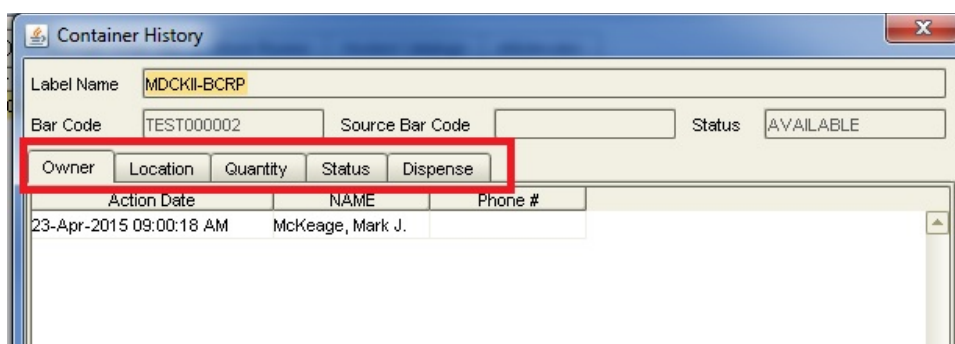
5.4 Checking container history

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.



5.5 Editing a container

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

Right Click the selected container in the result pane.

Select **Container Operations**, then **Edit**

Depending on your permissions, the selected container may be edited. If not, the following error message appears.



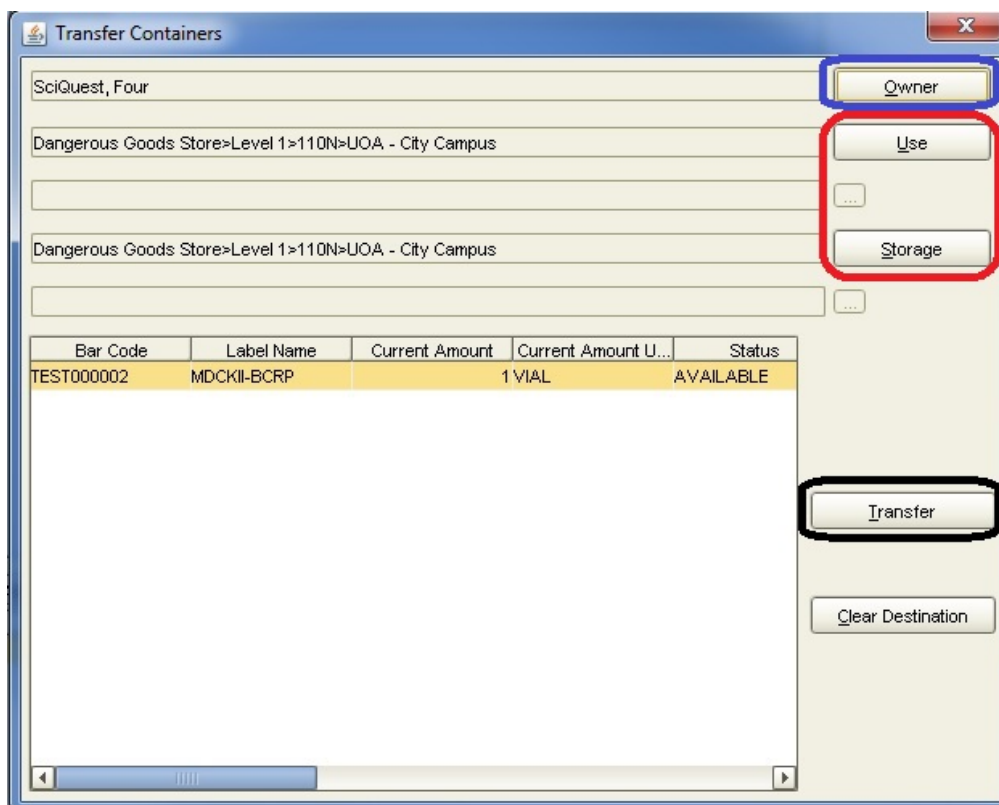
5.6 Transferring a container

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

Right Click the selected container in the result pane.

Select **Container Operations**, then **Transfer**.

Note: The default identity and location of the current user is automatically populated. Please ensure the original owner is **NOT** changed if the container is only intended to be temporarily relocated.



- **Changing the storage location**

You can change the storage location by **Pressing** the **Use** button and changing the location or **pressing** the **Storage** button and changing the location.

Press the **Transfer** button to confirm the transfer.

- **Transferring Ownership of the Container**

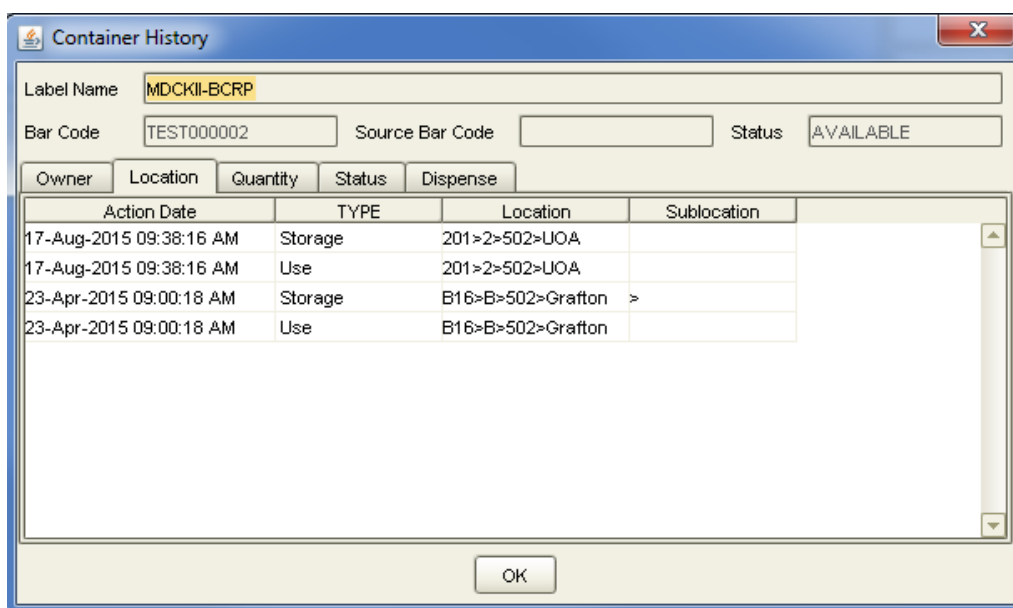
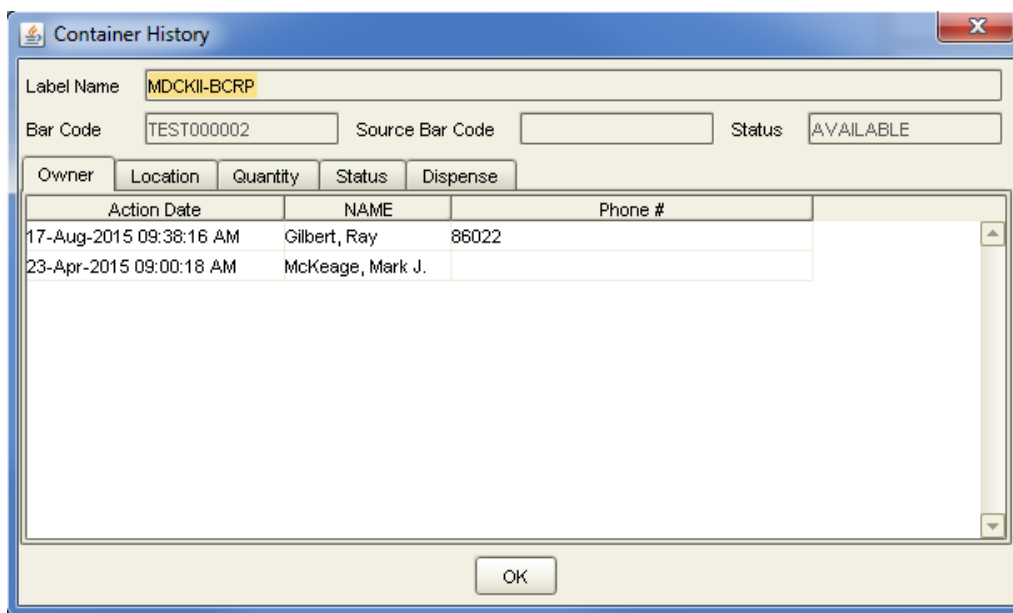
Reminder: Only Principal Investigator can be a container owner.

You can change the Owner of the Container by **Pressing** the **Owner** button

Find the new Owner using their last name, select the new owner. The new owner's default location is automatically populated.

Press the **Transfer** button to confirm the transfer.

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



5.7 Updating the quantity of material in a Container

Go to the **Search** tab. Search for the container of interest (as outlined in section 3).

Right Click the selected container in the result pane and Select **View Container**, then **Update Quantity**

Enter the end amount in the **End Amount** field and press **OK**

The screenshot shows a dialog box titled "Update Container Quantity". It contains the following fields and controls:

- Bar Code: 00001254
- Current Amount: 9 g (with a unit change button)
- Original Amount: 10 g
- Tare Weight: (empty field)
- Gross/Tare Weight section (Section not available for containers with amounts in volume):
 - Gross Weight: (empty field) with a balance scale icon and a unit dropdown set to 'G'
 - Tare Weight: (empty field) with a delete icon
 - End Amount: (empty field)
- Change/End Amount section (highlighted with a red box):
 - Change Amount: (empty field)
 - End Amount: (empty field) with an "Fill" button
- Buttons: "OK" (highlighted with a red box) and "Cancel"

6 Scan Operations

6.1 Changing location/owner with a Scanner

A **Scan Transaction** can be used to change the location or owner of containers. The scan transaction should be performed in the pre-defined delivery points (if applicable) where the following are available:

- a. Computer with SciQuest ERM running
- b. Scanner
- c. Barcode worksheet
- d. Directory of barcodes for users, locations and/or sublocations

6.1.1 Generate a Barcode Worksheet

A **Barcode Worksheet** can be generated which will provide up to four user barcodes and the ERM function barcodes:

- 1) Select File > Bar Code Worksheet
- 2) Select up to four users
- 3) Select a location (optional)
- 4) Select the Scan Functions required. For receipting, select "Check In".

ERM Bar Code Worksheet

Function



Check In

User ID



Boyd, Emily



Kennedy, Steve

Location ID



609>6>502>Sector 500 Grafton

Clear



Clear

Done



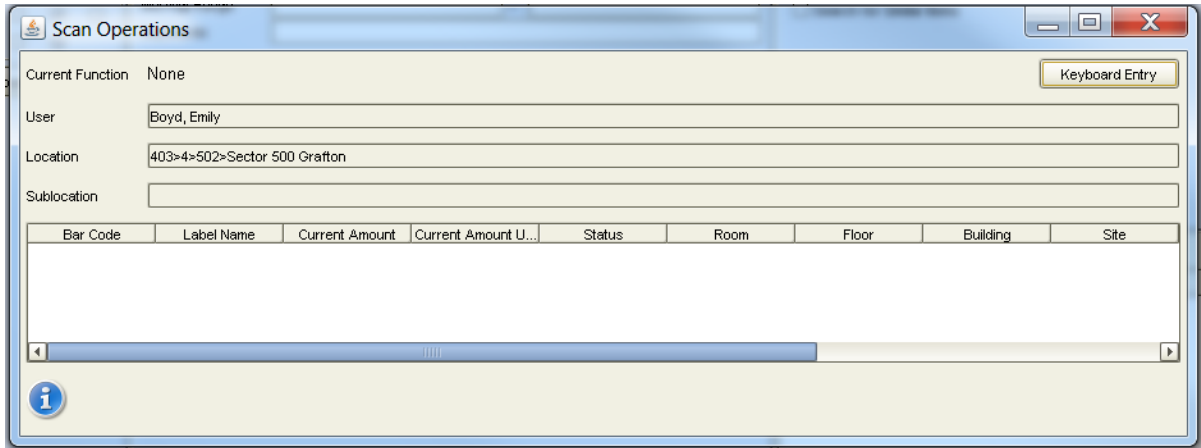
Done

Contact SciQuest@auckland.ac.nz for assistance in generating a directory of barcodes for users, locations and/or sublocations.

6.1.2 Performing Scan Transactions to change item owner/location

1) Select **File > Scan Operations**

The name and location of the person logged into SciQuest ERM is shown



The screenshot shows the 'Scan Operations' window with the following fields:

- Current Function: None
- User: Boyd, Emily
- Location: 403>4>502>Sector 500 Grafton
- Sublocation: (empty)

Bar Code	Label Name	Current Amount	Current Amount U...	Status	Room	Floor	Building	Site
----------	------------	----------------	---------------------	--------	------	-------	----------	------

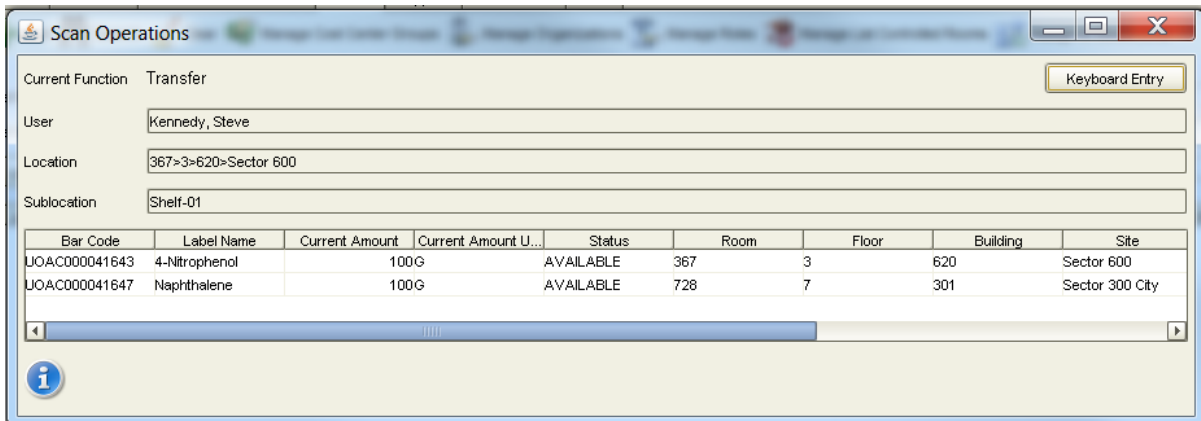
Buttons: Keyboard Entry, Information (i)

2) Scan the **Check In** barcode

The Current Function will change to "Transfer"

- 3) Scan the barcode of the item's Principal Investigator owner
- 4) Scan the barcode of the item's new location or sublocation
- 5) Scan the HazTRAC barcode of the item(s) that are to be transferred

These barcodes can be entered manually by selecting "Keyboard Entry"



The screenshot shows the 'Scan Operations' window with the following fields:

- Current Function: Transfer
- User: Kennedy, Steve
- Location: 367>3>620>Sector 600
- Sublocation: Shelf-01

Bar Code	Label Name	Current Amount	Current Amount U...	Status	Room	Floor	Building	Site
UOAC000041643	4-Nitrophenol	100G		AVAILABLE	367	3	620	Sector 600
UOAC000041647	Naphthalene	100G		AVAILABLE	728	7	301	Sector 300 City

Buttons: Keyboard Entry, Information (i)

6) Scan the **Done** barcode

The item will update in SciQuest ERM with a status of Available.



Check In



Done

6.2 Disposal 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 section 10.1 for more details.

- 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

7 Naming Locations and Sublocations

Locations and Sublocations are structured within SciQuest ERM to assist in finding chemicals and biologicals across the University.

Terms used are in line with those used in the university insite website

(http://floorplans.auckland.ac.nz/NetFM/space_viewer_start.aspx?db=aumxprd)

Campus
CITY - CITY CAMPUS

Sector
300 - SECTOR 300 CITY

Building
301 - SCIENCE CENTRE - CHEMISTRY

Floor
B

Room
003
008
00C2
00C3
00C4
00C8
00E1
00E2
00L1
00S1
00S4
00S5
00Z
011
011A
033
033A
033B
034

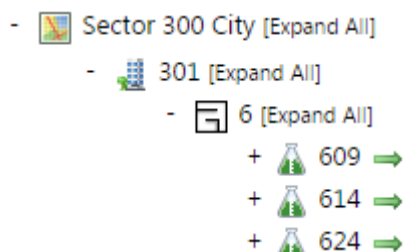
1. **Site: Sector number has to be included** (e.g. Sector 500 Grafton for most of FMHS, Sector 300 City for SCS, Sector 100 City for SBS)
2. **Building:** Please refer to the building number used in the insite website
3. **Floor:** Please be aware that sometimes “G” is used to refer to the ground level while “0” is used in some buildings, please refer to the insite website

4. **Room:** the website does not put the floor number in front of the room name (e.g. 034 instead of B034 which is the usual label on the door) but floor name is included in SciQuest.

7.1 Locations

Location names are fixed. Example of Location:

1. Site (Sector 300 city)
2. Building (301)
3. Floor (6)
4. Room (609, 614, 624)



7.2 Sublocations

Possible storage locations within Rooms (4) are called sublocations and can be added by the DLP.

Sublocation types and their levels, currently loaded in SciQuest, are:

Sublocation type	Abbreviation	Level
Bay	Bay	1
Fridge	FG	2
Freezer	<ul style="list-style-type: none"> • FZ (any freezer that is not -80) • 80 (-80 freezer) 	2
Dewar	DW	2
Cupboard	<ul style="list-style-type: none"> • CB (any other cabinet/cupboard that does not have an abbreviation) • UF (under fume hood cupboard/cabinet) • DC (drug cabinet/drug safe) 	2
Fumehood	FC	2
Solvent cabinet	SC	2
Corrosive cabinet	CC	2
Dangerous goods cabinet	DG	2
Dessicator	DS	2
Toxic cabinet	TC	2
Shelf	Shelf	3
Drawer	Drawer	3
Rack	Rack	4
Stack	Stack	4
Bin	Bin	5
Box	Box	6
Cane	Cane	6
Grid	Grid	10

Sublocations examples as follows:

F	G	H	I	J	K	L	M
Sublocation 1	sublocation 1 Type	Sublocation2	Sublocation2 Type	Sublocation3	Sublocation3 Type	Sublocation4	Sublocation4 Type
Bay-1	Bay (Level 1)	FZ-1	Freezer (Level 2)	Shelf-3	Shelf (Level 3)	Box-1	Box (Level 6)
FZ-2	Freezer (Level 2)	Shelf-1	Shelf (Level 3)	Box-1	Box (Level 6)	Grid A01	Grid (Level 10)
Bay-1	Bay (Level 1)	Shelf-12	Shelf (Level 3)				
Shelf-13	Shelf (Level 3)	Box-39	Box (Level 6)				

Each **sublocation layer** has to be assigned a type. (e.g. Freezer, Shelf, Box etc) and *then*

Each **sublocation type** has to be assigned a level (i.e. levels 1, 2, 3, 4, 5, 6, 10).

Preceding the sublocation type a smaller level has to be entered e.g.

Level 1 → Level 2 → Level 5 → Level 10

Level 1 → Level 5 → Level 10

Level 2 → Level 5 → Level 10

Level 2 → Level 10

Examples

A	B	C	D	E	F	G	H	I	J	K	L	M	R
Site	Building	Floor	Room	Room Type	Sublocation1	Sublocation1 Type	Sublocation2	Sublocation2 Type	Sublocation3	Sublocation3 Type	Sublocation4	Sublocation4 Type	Label
Sector 300 City	301	7	709 Lab	FC-15	Fumehood								Sector 300 City-301-7-709-FC-15
Sector 300 City	301	7	709 Lab	DS-03	Desiccator								Sector 300 City-301-7-709-DS-03
Sector 300 City	301	7	716 Lab	FG-01	Fridge								Sector 300 City-301-7-716-FG-01
Sector 300 City	301	6	624 Lab	Bay-01	Bay	Shelf-01	Shelf						Sector 300 City-301-6-624-Bay-01-Shelf-01
Sector 500 Grafton	502	3	317 Lab	80-1	Freezer	Shelf 1_Rack A	Rack		Box 01	Box	Grid A01	Grid	Sector 500 Grafton-502-3-317-80-1-Shelf 1_Rack A-Box 01-Grid A01

The above examples show:

- Fumehood#15 in room 709 on the 7th floor of Building 301 in Sector 300 of the City Campus
- Dessicator#3 in room 709 on the 7th floor of Building 301 in Sector 300 of the City Campus
- Fridge #1 in room 709 on the 7th floor of Building 301 in Sector 300 of the City Campus
- Shelf#1 in Bay#1 in room 624 on the 6th floor of Building 301 in Sector 300 of the City Campus
- Grid A01 in Box 01 in Shelf 1_Rack A inside Freezer 80-1 located at room 317 on the 3rd floor of building 502 of the Grafton Campus

7.3 Standardised nomenclature for shelves, racks, boxes and grids

Please refer to the University of Auckland Containment Procedure 8 for standardised nomenclature for shelves, racks, boxes and grids.

8 Disposal processes

8.1 Disposing of Hazardous and Restricted Materials

Some hazardous chemicals need to be transferred to a holding area (e.g. hazardous goods bunker) for disposal. These disposals require further action from either you DLP and Hazard Approver. Notify your DLP for disposal of such items.

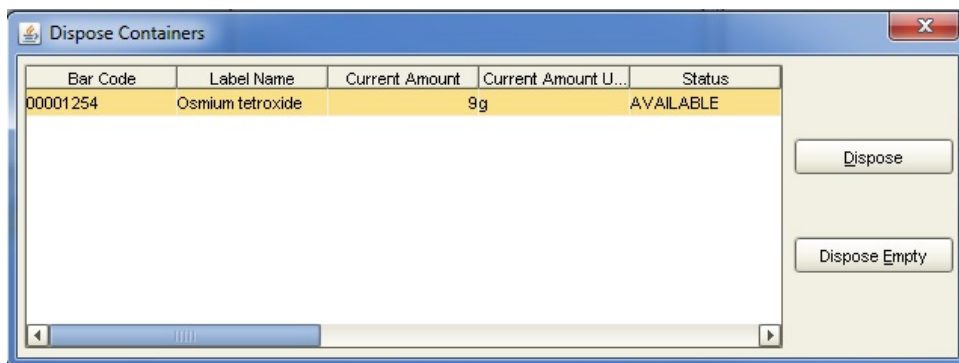
8.1.1 Disposing chemicals

Note – this operation can be performed with a Scanner. Refer to section 6.2 for instructions.

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

Right Click the selected container in the result pane.

Select **Container Operations**, then **Dispose Containers**




Select **Dispose** if the container is not empty or **Dispose Empty**.

8.1.2 Disposing of biologicals

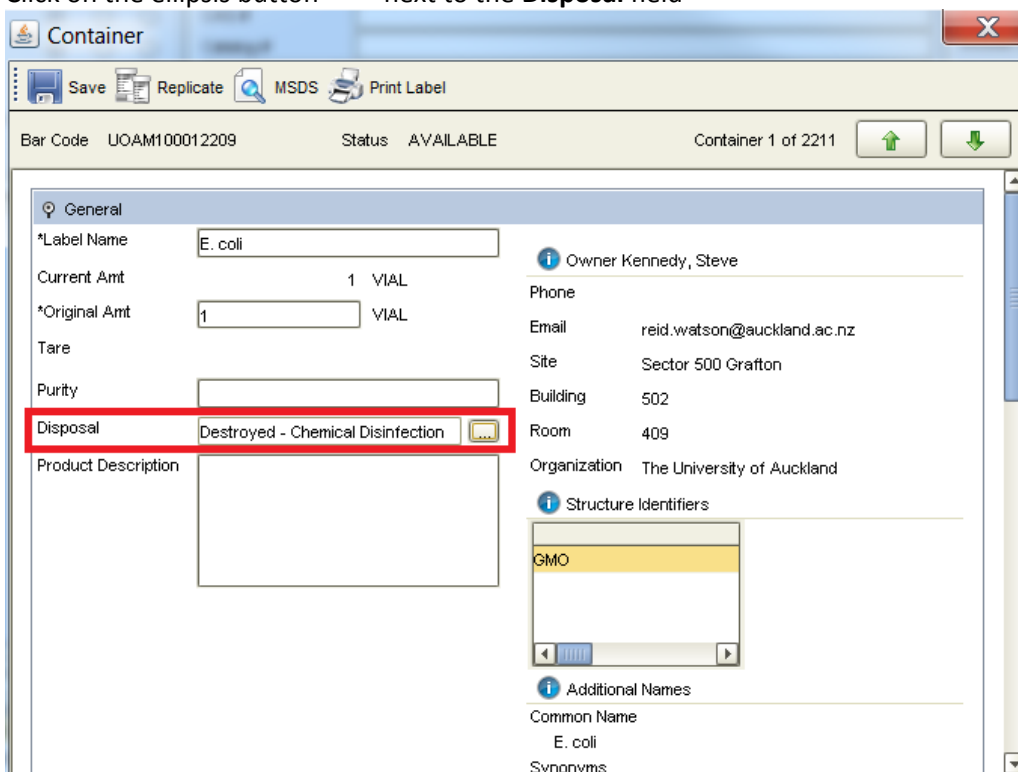
(Note that cell lines that are thawed for use or culture should be “disposed empty” in the same method as chemicals above).

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

Right Click the selected container in the result pane.

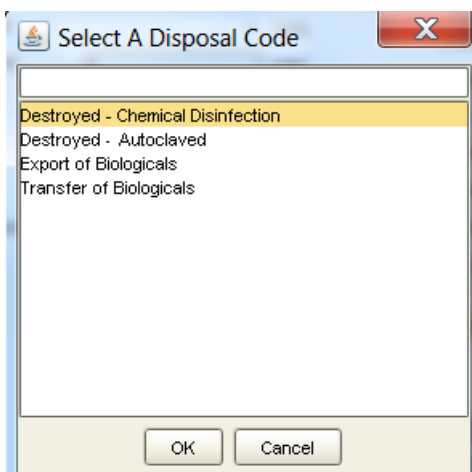
Select **View Container**, click the Edit button 

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



The screenshot shows a 'Container' window with the following details:

- 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: (empty)
- Purity: (empty)
- Disposal: Destroyed - Chemical Disinfection (highlighted with a red box and an ellipsis button)
- Product Description: (empty)
- Owner: Kennedy, Steve
- Phone: (empty)
- 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: (empty)

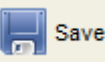


The 'Select A Disposal Code' dialog box shows a list of options:

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

Buttons: OK, Cancel

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 

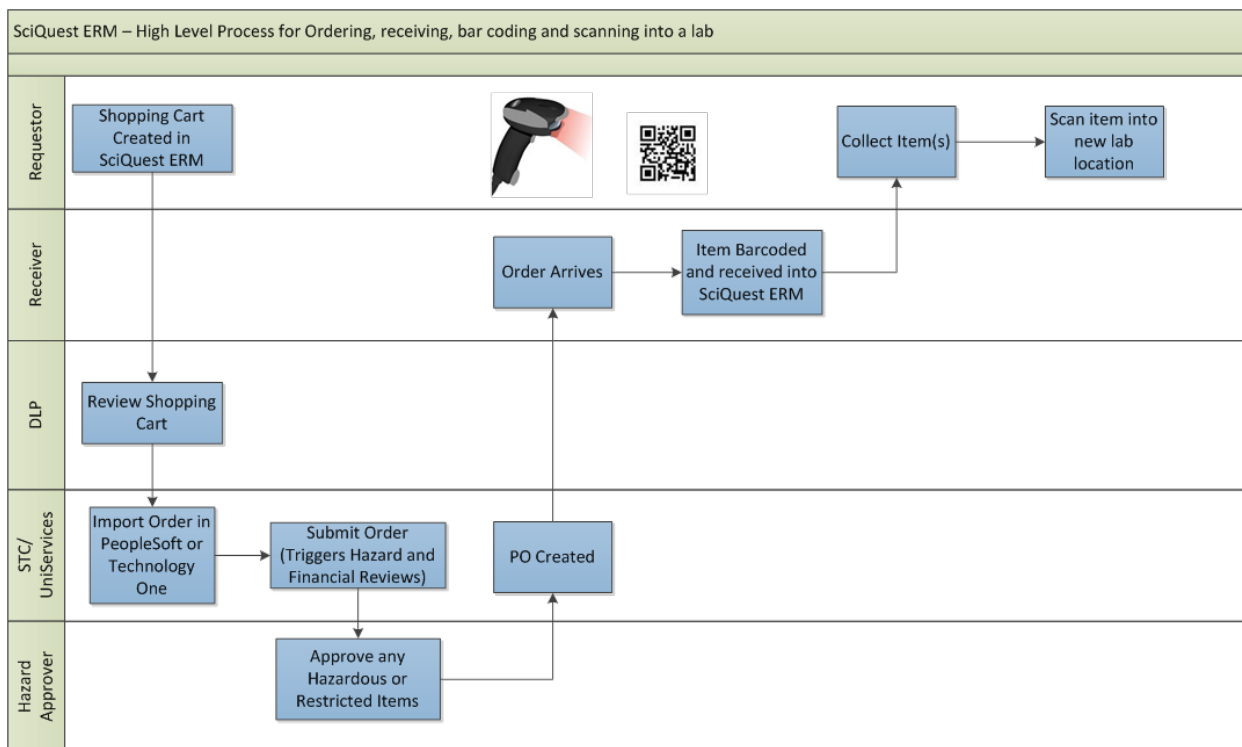
The next step is to set the status of the item to “Disposed”. This can be done in bulk using a scanner (see section 6.2) or manually as follows:

Right click the selected container in the result pane.

Select **Container Operations**, then **Dispose**

Select **Dispose**

Outline of the Procurement Process



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	Purchasing system used by Finance
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.
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



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NEW ZEALAND

SciQuest ERM

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

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