4. Type In Purchases

Overview

This quick guide will show you how to submit a requisition for a chemical, biological or consumable that cannot be found in the SciTrack Hosted Catalogues.

1. **Shopping Cart**
2. **Enter item details**
3. **Review shopping cart**
4. **Checkout and submit**
5. **DLP Approval**
6. **DLP submits carts to purchasing team**

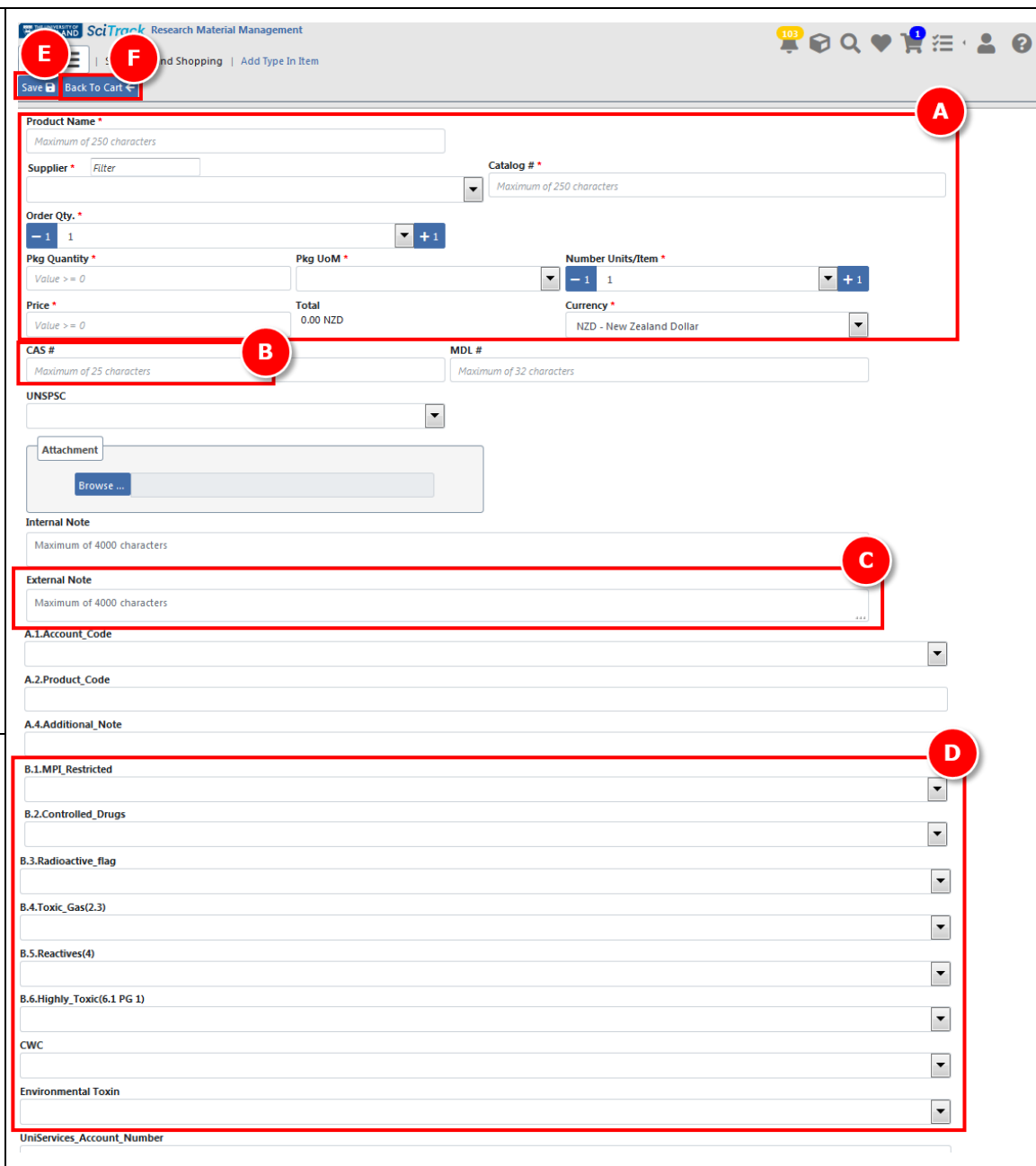| Steps	Screenshots
1. Shopping Cart A. Click **Shopping Cart**. B. Click **Add Item +**.	

2. Enter item details

A. Complete mandatory fields (*).

B. **Add the CAS number when buying a chemical.**

C. Type **quote** numbers or other information to be sent to the supplier in the External Note field.

Quotes: If you have a quote, you need to enter this number into the External Note field for the first item in the cart only. External notes will not be sent to the supplier for other cart items.

D. If an item is restricted or hazardous, the appropriate field should be set to "true" from the drop down box.

E. Click **Save.**

F. Click Back To Cart once you are finished adding items. Note only one supplier and currency per cart.

Note:

➢ **Attachments:** You may attach a file to your cart but this **will not** be carried through to the purchase order. Any attachments for the supplier should be added to the STC request.

➢ **Currency** defaults to NZD.

➢ **Catalogue number** needs to exactly match the catalogue number provided by the supplier. If not available, use N/A.

➢ Only use **MDL#** if no **CAS#** is available.

3. Review shopping cart

A. Optional- select item name to **Delete** or **Edit Item**.

B. Complete any required actions (see Matching Materials section on the next page).

C. **Select a material class (if required)**
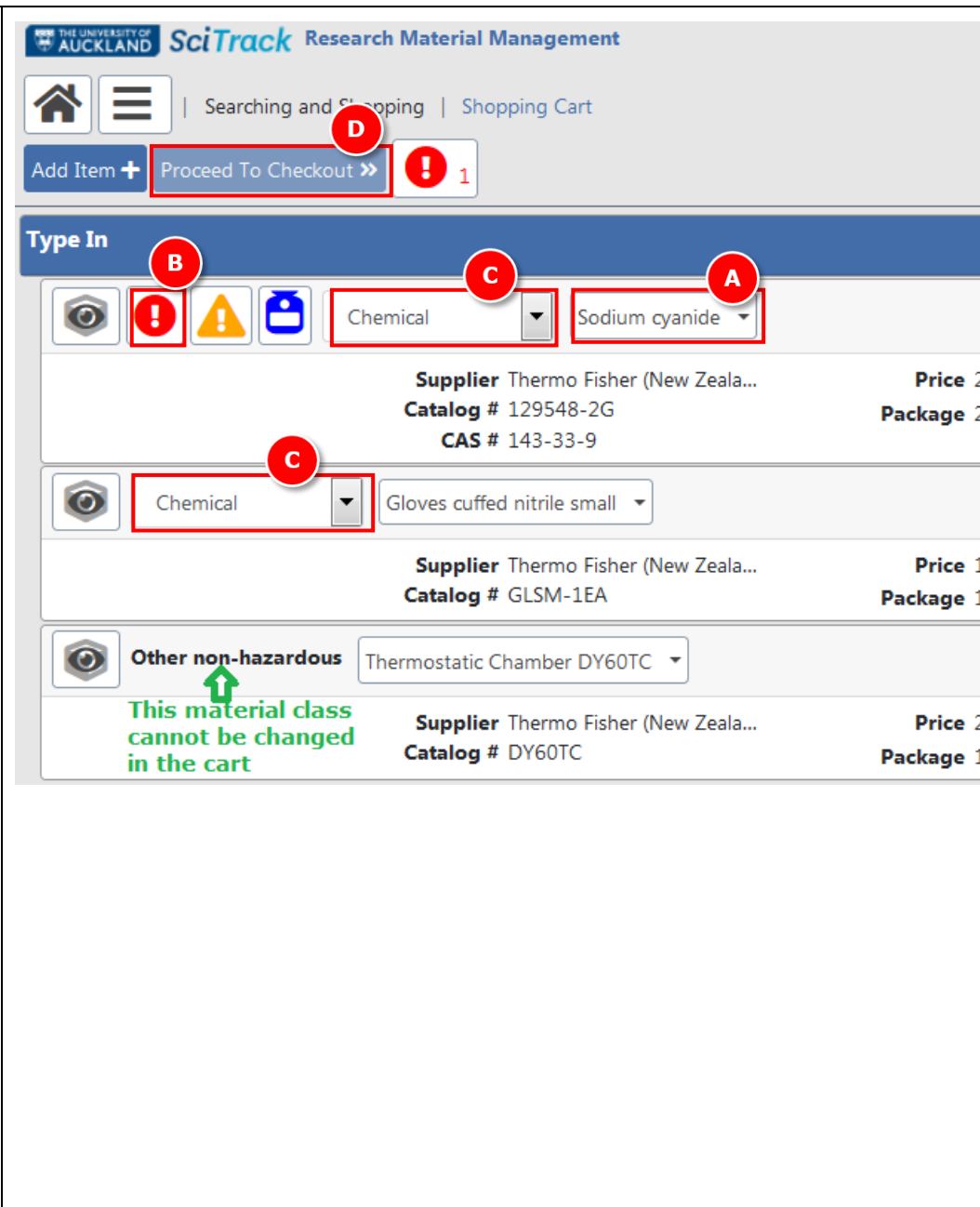
<u>**Choosing a material class**</u>

If an item has not been purchased before, you must select an appropriate Material Class before clicking Proceed to Checkout. There are three classes to choose from:

Class	Examples
Chemical	Single chemical with a CAS number or a combination of hazardous chemicals.
Restricted biological	Restricted cell lines, animal tissue, or kits containing animal serum (e.g. ELISA kits with BSA), usually imported from overseas.
Other non-hazardous	Lab equipment, unrestricted antibodies, sterile growth media, saline solutions, non-hazardous buffers

➔ If you don't select a class, it will default to **Chemical**.

➔ Items classified as **Other non-hazardous** will not require barcodes during receipting.

➔ Items classified as **Chemical** or **Restricted Biological** will require barcodes by default during receipting (but DLPs can override this if necessary).

<u>**Changing a pre-selected material class**</u> can only be done by editing the material in Material Search. *Please see the Quick Guide* ***11. Creating Materials and Containers*** *for instructions on material searching.*

D. When finished, click Proceed to Checkout
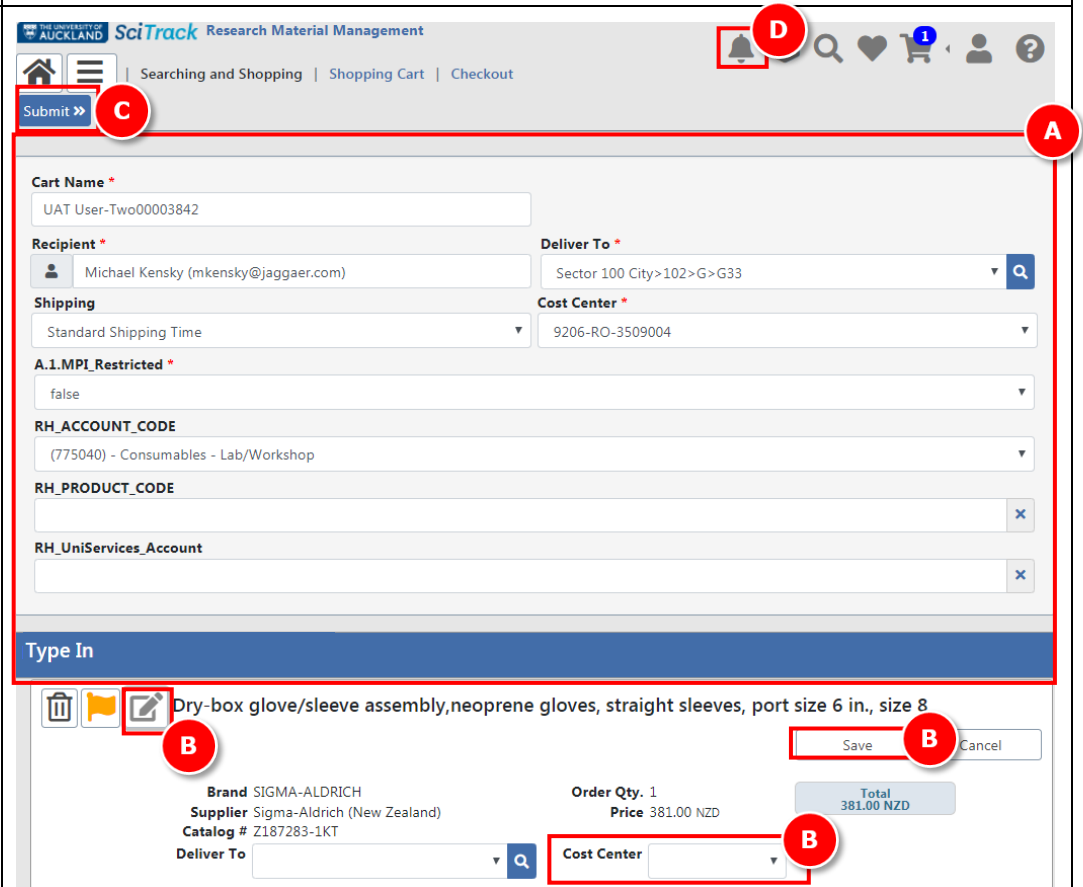
⛔ Matching Materials

If your item can be matched to multiple materials, you will be prompted to choose the most suitable material.

➢ Try to match your item to an existing material wherever possible by selecting the radio button next to the material name

➢ If no suitable match exists, tick "**No Suitable Match Listed, Create Material**".

Match Material

Search Term ...

☐ No Suitable Match Listed, Create Material

○ Sodium cyanide 30% solution 143-33-9 MFCD00003523

○ Sodium cyanide 143-33-9 MFCD00003523 **Danger**

4. Checkout and Submit

A. Complete the fields (*refer to Appendix*).

➢ **IMPORTANT**: Please do not change the Cart Name from the default

B. Optional: you may choose a different cost centre for each line item. The 'Cost Center' selected in the header field (A) applies to all line items <u>unless</u> a different cost centre is selected for the line.
- Click the pencil for the line item to display more fields
- Choose another cost centre from the drop-down list
- Click **Save**

C. Click **Submit.**

D. A notification will be generated with a pdf report of your cart. Click the notification bell, then open the report by clicking 📄

Tip:

To change the **recipient** name:

In the Checkout screen, click on your name in the Recipient field. Then type **either** the first or last name of the recipient (not both!). Wait a moment, then click the correct one.

SciTrack Research Material Management

Searching and Shopping | Shopping Cart | Checkout

Submit »

Cart Name *
UAT User-Two00003842

Recipient *
Michael Kensky (mkensky@jaggaer.com)

Deliver To *
Sector 100 City>102>G>G33

Shipping
Standard Shipping Time

Cost Center *
9206-RO-3509004

A.1.MPI_Restricted *
false

RH_ACCOUNT_CODE
(775040) - Consumables - Lab/Workshop

RH_PRODUCT_CODE

RH_UniServices_Account

Type In

🗑 🚩 ✏ Dry-box glove/sleeve assembly,neoprene gloves, straight sleeves, port size 6 in., size 8

Save | Cancel

Brand SIGMA-ALDRICH
Supplier Sigma-Aldrich (New Zealand)
Catalog # Z187283-1KT

Order Qty. 1
Price 381.00 NZD

Total 381.00 NZD

Deliver To

Cost Center

5. DLP approval

➤ **IMPORTANT**: Carts that are not created by DLPs require DLP approval before they can be processed by the purchasing team. Please email your cart name to your DLP who can approve the order in SciTrack.

➤ **DLPs please see the SciTrack Quick Guide "8. DLP cart approval and submit".**

2. DLPs Submit carts to purchasing

A. Submit the request to the Shared Transaction Centre through e-Quote Purchase Order Requests.

  a. Go to the e-Quote request form: https://www.forms.auckland.ac.nz/en/staff/financial-services/e-quote-purchase-order-request.html/

  b. Enter **cart name** into the **SciTrack cart name** field (e.g. Boyd00043128).

  c. Attach supporting documentation for the supplier where required, e.g. MPI import permit.

B. **OR** Submit **UniServices** orders to UniServices Purchasing:

  a. Fill out **UniServices Request Template** found on the University SciTrack website

  b. Email request to purchasing@uniservices.co.nz.

| Home | Search Results | Submit a request | My requests |

Submit a question to our service team

Service *

Shared Transaction Centre (STC) ▼

Request to Purchase ▼

e-Quote Purchase Request /SciTrack ▼

To submit a request,CLICK HERE

Select supplier

SciTrack ⌄

Do you have a cart name or a replenishment number?

◉ SciTrack cart name

◯ SciTrack replenishment request number

SciTrack cart name

[ ]

Note:

➤ To view or edit a cart after clicking Submit, please see the SciTrack Quick Guide "7. Track orders and reorder".

Field Name	Description
Recipient*	The recipient is the person who the item will be addressed to. **Only Principal Investigators or DLPs are allowed to be the recipient.** Note – 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 under the Health and Safety at Work Hazardous Substances Regulations and the University Health, Safety and Wellbeing Policy.
Deliver To*	The delivery location is predetermined based on your Site, regardless of the room you pick. To find your SciTrack delivery point, please visit the SciTrack website.
Cost Center*	The Cost Centres displayed are those assigned to the Recipient. If a recipient's codes are missing, please complete a "request change" form from the SciTrack website. **UniServices:** • When a UniServices cost centre code is selected ("UniServices Project") it is also necessary to supply the UniServices account number *(see RH_UniServices_Account_Number below)*
MPI Restricted*	This will apply to all items in the cart unless MPI_Restricted has been selected at the individual line item level. This should be TRUE for any restricted biologicals.
RH_PRODUCT CODE	**Optional:** Enter the PeopleSoft Financials product code this order will be charged to. E.g. A76x or 760.
RH_UniServices_Account _Number	This field must be populated when "UniServices Project" cost centre code has been selected and must be in the appropriate format ie 99999.999 (5 digits, full stop, 3 digits)
RH_ACCOUNT CODE	**Optional:** Select the PeopleSoft Financials product code this order will be charged to. ➢ **IMPORTANT**: When using a PReSS account, you must select the RH_ACCOUNT_CODE of **312775**

Shopping Cart Icons:

	Displays the chemical structure associated to the material.		Click to see what action is required to submit your cart. Click the Fix button 🔧 to take action.
	View warnings and Codes of Practice associated to the material.		Click to add the item to your favourites.
	View similar items that already exist in the inventory.		Click to check status of DLP approval. If status shows "Pending ERM Approval", you need to ask a DLP to approve the item. If you are a DLP, your carts will not require DLP approval.