

8. DLP Cart Approval and Submit

Overview





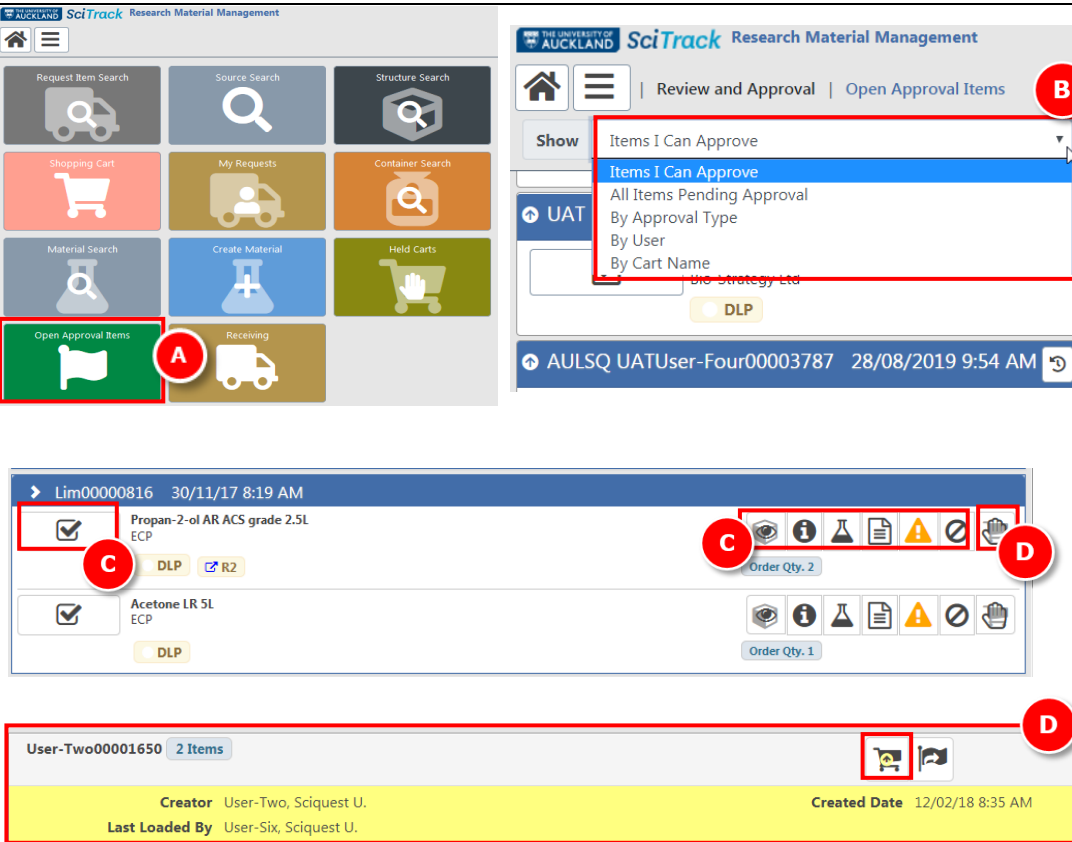
This quick guide will show you how to approve carts and submit them to purchasing in SciTrack. DLPs are responsible for approving carts for their research area and submitting them to the STC.

- Carts created by DLPs do not require approval
- Stockroom carts do not require DLP approval
- DLPs should only approve carts that they have been specifically asked to approve by the cart creator

1. Approve Researcher carts

2. Submit carts to purchasing


Appendix: Anticipated tasks associated with the DLP role in ERM

Steps	Screenshots
<p>1. Approve Researcher Carts</p> <p>A. Click Open Approval Items.</p> <p>B. Select preferred option to view results. Search for the cart by holding CTRL-F and searching for the cart name in the page.</p> <p>C. <u>For the cart you have been asked to approve</u>, approve/reject each item:</p> <ul style="list-style-type: none">• For more item information, click .• Click  to approve item or  to reject item. <p>D. Optional – to edit the cart and/or generate a Shopping Cart Submit Report for your records:</p> <ol style="list-style-type: none">Go to the held cart by clicking .You will be taken to the held cart window, and the cart will be highlighted. Click the load cart button .Edit the cart if required, then Proceed to Checkout and click Submit. <p>➤ Note: if anyone (including a DLP) adds or edits an item in a Researcher's cart, it may require DLP approval.</p>	

Important - DLPs must review carts to check:

Stage	Description
Before purchasing	Check inventory for existing stock.
Before purchasing	Permits obtained for any restricted items.
Before purchasing	Ensure there are appropriate storage facilities for the item (ie solvent cabinet for flammables).
Shopping Cart	Check that the item and quantity are appropriate. Consider end-of-life disposal costs and only buy the amount you require.
Shopping Cart	If ordering chemicals, CAS number must be included. Hazard flags should be set automatically based on the CAS number, but if missing please flag manually in the item details.
Shopping Cart	Quote numbers need to be typed into the External Notes section for the first line item.
Checkout	Recipient is a DLP or Principal Investigator (PI).
Checkout	Cost Centre/product code selected are approved for use.
Checkout	MPI Restricted is set to TRUE for restricted biologicals, but FALSE otherwise.
Checkout	RH ACCOUNT CODE is correct for the cost centre (if a PReSS account is used, must be 312775).
Checkout	Check that type in items show correct order quantity (in the Checkout screen).

Note:

- **Items I can approve** shows all carts in your site. Please only approve the carts you have been specifically asked to.
-  indicates the item has been flagged for hazard approval.
- DLP-approving an item does not stop the item from going through hazard approval.
- Each item in a cart needs to be approved individually.

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2. 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](#)
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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

Appendix: Anticipated tasks associated with the DLP role in ERM

DLP working in a restricted biological containment area

- Attend the DLP containment training course (sign up on Career Tools)
- Purchase all biologicals through SciTrack. If the supplier you need is not set up in SciTrack, contact scitrack@auckland.ac.nz
- All restricted biological purchases should be received in SciTrack and updated in SciTrack with the correct location, owner, and BACC# or central register number (if applicable) **within 1 week of delivery**. This also applies to restricted biologicals transferred into a containment facility.
- Restricted biologicals that are created in-house (not purchased) should be entered into SciTrack **within 1 month of creation**. This can be done by sending the SciTrack biologicals upload template to scitrack@auckland.ac.nz
- Ensure the SciTrack containers of restricted biologicals include all applicable identifiers (e.g. BACC#, central register number (e.g. GRAF#), HSNO application#), and have owner/location updated as required.
- When disposed of or destroyed, the SciTrack container must be recorded as disposed and the method of disposal or destruction noted. Transfers out to other facilities and exports must also be recorded as disposed.

DLP required to purchase chemicals

- Purchase all chemicals through SciTrack. If the supplier you need is not set up in SciTrack, contact scitrack@auckland.ac.nz
- Include the CAS number when purchasing chemicals, and ensure any highly hazardous chemicals have the appropriate hazard class flag (e.g. UN6.1 PG1 Highly Toxic).
- All chemical purchases must be received in SciTrack with a physical barcode applied, then transferred in to the correct SciTrack location and owner within 1 week of receipt.
- When disposed of or destroyed, the SciTrack container must be recorded as disposed empty (if used up) or disposed (if sent away for chemical disposal). Transfers out to other facilities and exports must also be recorded as disposed.
- <https://www.staff.auckland.ac.nz/en/human-resources/health-safety-and-wellbeing/health-and-safety-risk-management/chemical-safety.html>

DLP not lab-based (typically purchases only non-hazardous items)

- Seek advice before creating or approving carts that may contain chemicals or restricted biologicals.
- All purchases through SciTrack-listed suppliers must go through SciTrack, including raising purchase orders for repairs or maintenance.
- Receipt all SciTrack orders in SciTrack (unless they have already been receipted by the staff at the delivery point). Once receipted in SciTrack, you do not have to request receipt through the Staff Service Centre.
- Dispose of any barcodes in SciTrack that have been applied during receipting by mistake.