

9. Receipting and Transferring Orders

Overview

Items that you have ordered through SciTrack need to be **receipted** in SciTrack and then **transferred** to the owner and final location. This quick guide will show you how to do so.

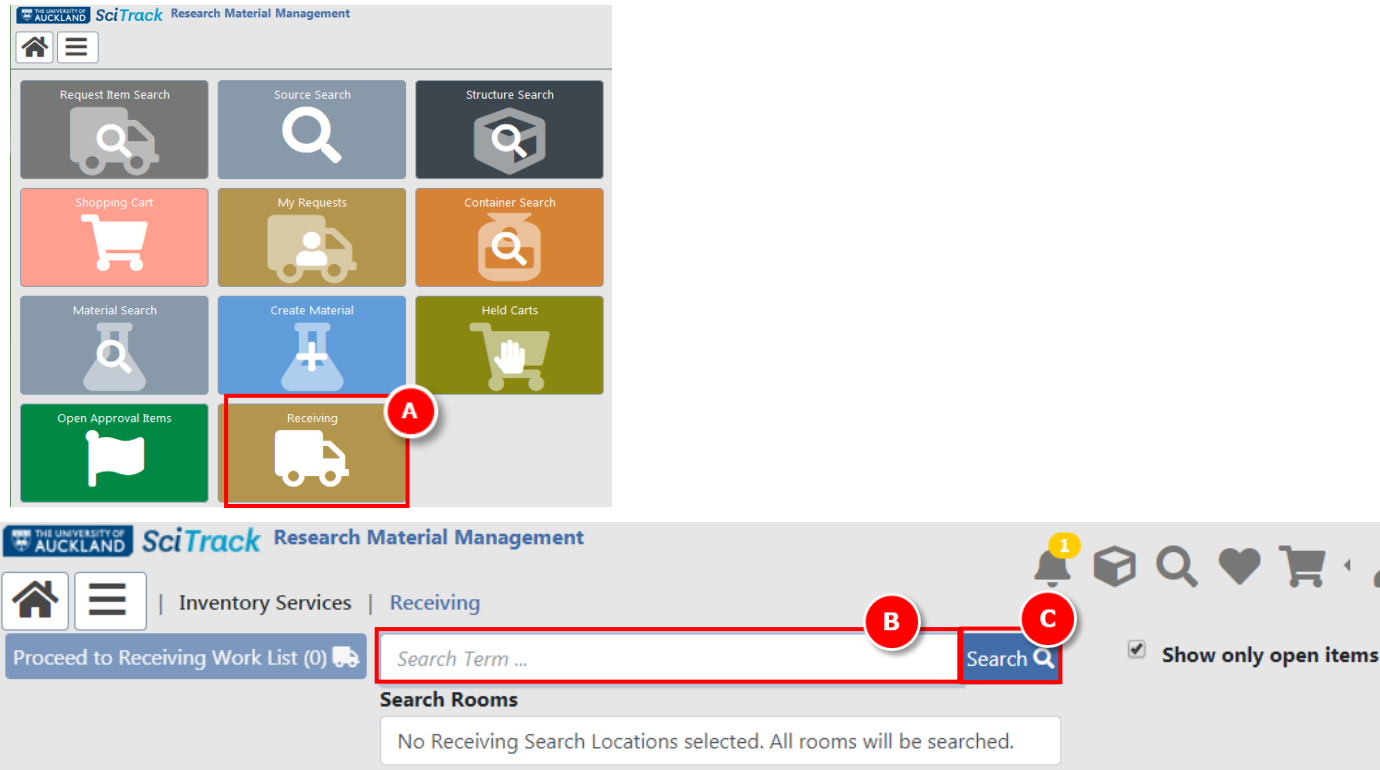
- **Receipting (aka receiving)** is usually completed in the stockroom by the stockroom personnel. Some specialist items may need to be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP for all barcoded items.
- When an item is receipted in SciTrack, it will be automatically receipted in PeopleSoft Financials/UniServices Purchasing within 2-3 days.

1. Receipting part 1: Search for a purchase order

2. Receipting part 2: Select items to receive

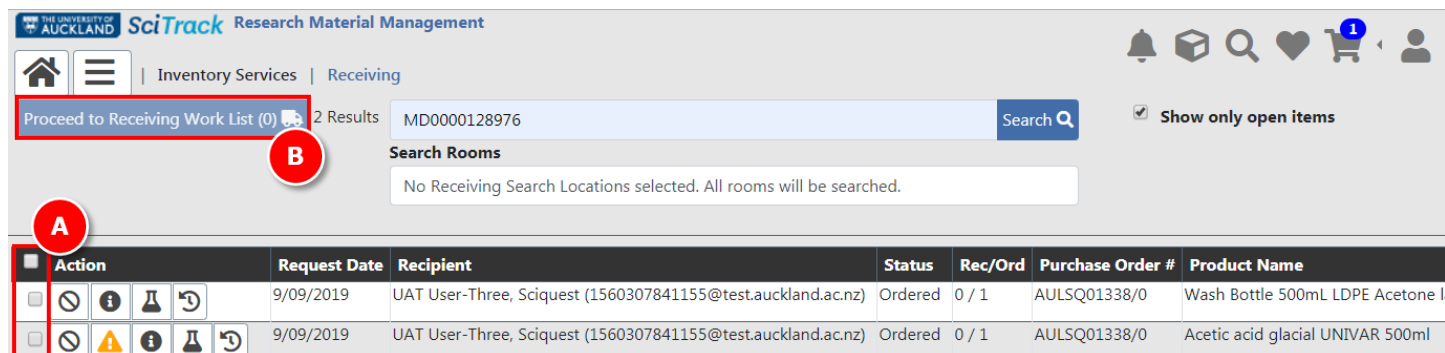
3. Receipting part 3: Review and receive an item

4. Transfer barcoded items

Steps	Screenshots
<p>1. Search for a purchase order</p> <p>A. Click Receiving.</p> <p>B. Enter P.O. number or cart name in the Search Term field.</p> <p>C. Click Search.</p> <p>Tip: Uncheck the "Show only open items" box to view orders that have already been receipted.</p>	

2. Select items to receive

- A. Check the items you want to receive.
- B. Click [Proceed to Receiving Work List \(2\)](#) to add selected items to Work List.



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Inventory Services | Receiving

Proceed to Receiving Work List (0) 2 Results MD0000128976 Search

Show only open items



Search Rooms
No Receiving Search Locations selected. All rooms will be searched.

Action	Request Date	Recipient	Status	Rec/Ord	Purchase Order #	Product Name
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	9/09/2019	UAT User-Three, Sciquest (1560307841155@test.auckland.ac.nz)	Ordered	0 / 1	AULSQ01338/0	Wash Bottle 500mL LDPE Acetone l
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	9/09/2019	UAT User-Three, Sciquest (1560307841155@test.auckland.ac.nz)	Ordered	0 / 1	AULSQ01338/0	Acetic acid glacial UNIVAR 500ml

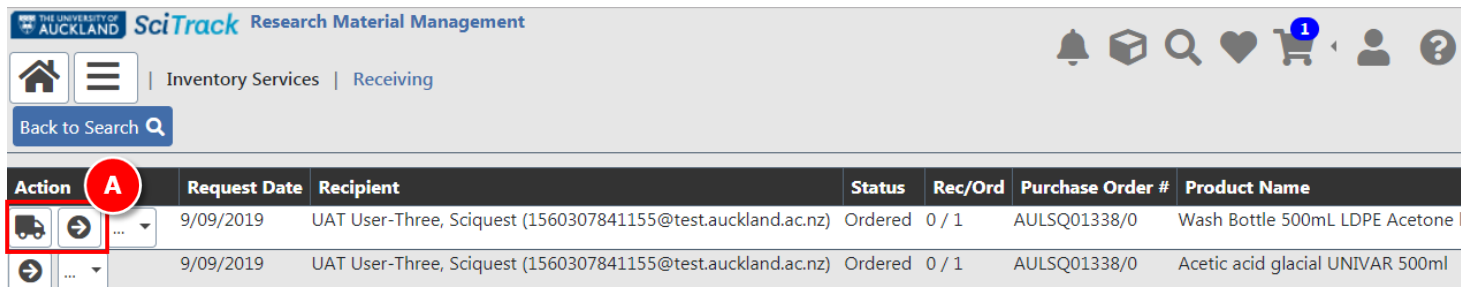
Note:

- **Proceed to Receiving Work List** [Proceed to Receiving Work List \(2\)](#) displays the number of items to be added to your Work List. The **Work List** is a group of request items that are ready to be received, but not necessarily from the same shopping cart.
- Click ☐ heading to select all items in the search screen.
- Click ☐ to cancel the request item (**note that this will not cancel the purchase order for the supplier** – you will need to contact the STC for this).

3. Receive the selected items

- A. If the quick receipt icon  is available, click this to instantly fully receipt the item without barcodes. This is for items classified as "Other non-hazardous". Otherwise, click  to enter the receipting window.




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Back to Search

Action	Request Date	Recipient	Status	Rec/Ord	Purchase Order #	Product Name
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- B. Change the **Quantity to Receive** value if you have received a partial order.
- C. Make sure **Create Containers** is checked for all chemicals and restricted biologicals. Uncheck it to receive a non-hazardous item without barcodes (DLPs only).

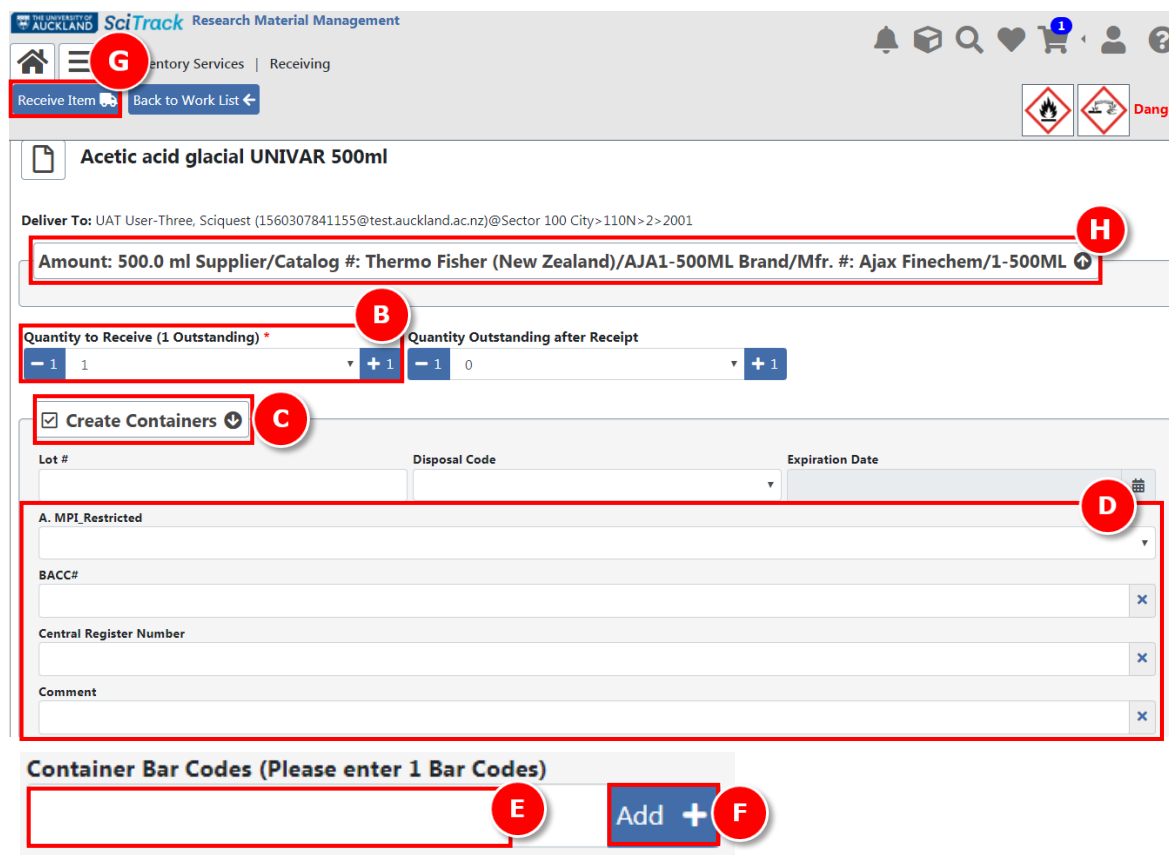
Important:

- Please make sure you only uncheck Create Containers (C) for non-hazardous items.
- Unchecking Create Containers on chemicals or restricted biologicals may breach the Health and Safety at Work Hazardous Substances Regulations, HSNO Regulations and the University Health, Safety and Wellbeing Policy.

- D. If a container is to be created, fill in all relevant fields (mainly used for biologicals).
- E. Scroll to the bottom of the page to enter/scan the pre-printed barcode to be attached to the item.
- F. Click **Add +** after each bar code.
- G. Click **Receive Item** to complete the receipt.

Note:

- Click Package Information button to open Package Information Details pane and edit if required (H). This lets you change the Lot Size which changes how many barcodes are asked for.
- Click **Back to Work List** to stop receiving.



Acetic acid glacial UNIVAR 500ml

Deliver To: UAT User-Three, Sciquest (1560307841155@test.auckland.ac.nz)@Sector 100 City> 110N> 2> 2001

Amount: 500.0 ml Supplier/Catalog #: Thermo Fisher (New Zealand)/AJA1-500ML Brand/Mfr. #: Ajax Finechem/1-500ML

Quantity to Receive (1 Outstanding) * 1 Quantity Outstanding after Receipt 0

☒ Create Containers

Lot # Disposal Code Expiration Date

A. MPI_Restricted

BACC#

Central Register Number

Comment

Container Bar Codes (Please enter 1 Bar Codes)

Add +

Receiving partial orders:

- If you receive a partial order, the Quantity Outstanding after Receipt will automatically calculate what is outstanding.
- If the quantity received is less than what is outstanding and you are not expecting any further receipts for the item, change Quantity Outstanding after Receipt to 0.

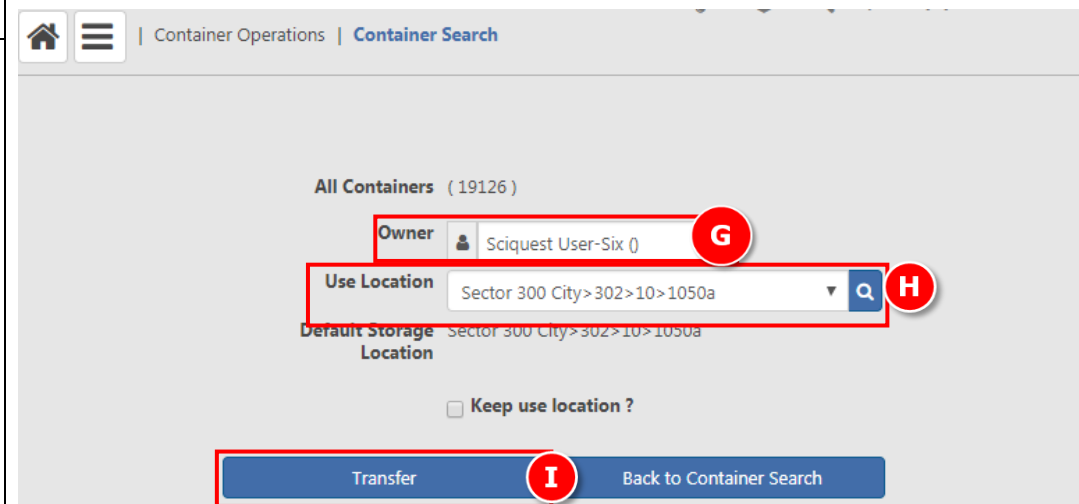
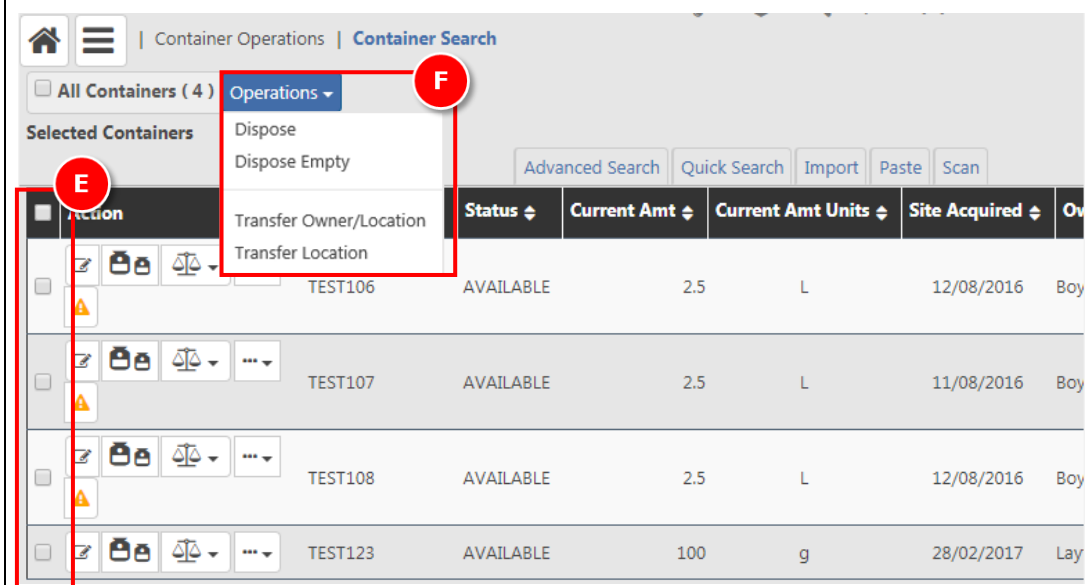
4. Transferring items

This feature allows you to change the location and/or the owner of inventory items. For more information about the Container Search window, please see SciTrack Quick Guide "10. Container Search and Operations"

- A. Click **Container** Search.
- B. Click **Paste** tab.
- C. Type or paste in the barcode(s).
- D. Click **Search**.

The screenshot displays the SciTrack Research Material Management interface. At the top, there is a header with the University of Auckland logo and the SciTrack logo. Below the header is a grid of icons for various functions: Request Item Search, Source Search, Structure Search, Shopping Cart, My Requests, Container Search (highlighted with a red box and labeled A), Material Search, Create Material, Held Carts, Open Approval Items, and Receiving. Below the grid is a search bar with tabs for Advanced Search, Quick Search (selected), Import, Paste (highlighted with a red box and labeled B), and Scan. Below the search bar is a text input area labeled "Paste bar codes into the area below" with a red box around it labeled C. A note above the input area states "Maximum of 9,999 bar codes." Below the input area is a "New Search" button and a "Search" button (highlighted with a red box and labeled D).

- E. Select the containers to transfer.
- F. Click **Operations** and select **Transfer Owner/Location**.
- G. Changing owner:
 - a. Enter first name or surname.
 - b. Select desired user.
- H. Changing location:
 - a. Select location from drop-down list **OR**
 - b. If required location is not available, use location search button to select the location.
- I. Click **Transfer**.



Note:

- Owner defaults to the logged-in user.
- The locations drop-down is populated by the selected recipient's alternate delivery locations. You may change your own alternate delivery locations in User Preferences.
- For more details on how to transfer only the owner or location, please see the SciTrack Quick Guide "10. Container Search and Operations"