SciQuest ERM

Knowledge Articles

1. General

The Knowledge Articles apply to Windows PC users not Apple Mac users.

What is the SciQuest Enterprise Reagent Manager system?

It is a cradle to grave purchasing and inventory system for all laboratory purchasing and creation of chemicals and risk biological items. The implementation of the system is to improve inventory management of hazardous and restricted items and to enable better compliance with external regulatory bodies.

How will I access SciQuest?

- You should fill in the access request form which can be found here: https://www.auckland.ac.nz/content/dam/uoa/auckland/students/academic-information/postgraduate-students/sciquest-erm/getting-started-with-sciquest-erm/sciquesterm-access-form.docx
- Submit this form to sciquest@auckland.ac.nz. If you require assistance see your Designated Laboratory Person (DLP).
- Training should be taken prior to being granted access and is available on the SciQuest ERM website as videos, manuals, cheat sheets and quick reference guides: https://www.auckland.ac.nz/en/students/academic-information/postgraduate-students/sciquest-erm.html

How do I start working with SQ?

- Internet Explorer Browser is recommended, and you may also use Firefox ESR Version 52.0.1 (Google Chrome is not supported). Pop-ups must be enabled.
- Access to SciQuest ERM is possible from a non-University of Auckland computer.
- Initial access to the system will be slow and thereafter you should find it faster.
- Support for SciQuest ERM system will be through Staff Services Centre.

What is a Researcher?

A researcher in SciQuest ERM is a PI, technician, or student.

What is a DLP?

The Designated Laboratory Person is a staff member who 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.

What is PI (Principal Investigator)?

A PI (Principal Investigator) in SciQuest ERM is the responsible owner of chemicals and risk biologicals purchased by them or for them.

Who are Hazard Approvers?

Hazard Approvers are nominated and appointed by the Hazard Containment Manager (David Jenkins). SSC would then be advised to include the Name and UPI in workflow.

Why can't I see some tabs in SciQuest ERM -Viewing Tabs and Columns?

Tabs are hidden or displayed depending on your user permissions. Clicking on the Tabs in the browser window will give you access to functions of the system that you have permissions for.

What has happened with existing stock?

- Existing stock has been entered into SciQuest ERM.
- The use of spreadsheets to track items has been replaced by SciQuest ERM.

2. SciQuest ERM equipment

a. Barcode Labels

- The Barcode Label is a unique identifier that links directly to the item in SciQuest ERM which holds information on the item that includes CAS number, expiry date, manufacturer, amount, location and owner.

- Inventory will have University of Auckland Barcode Labels applied, identifying each item with a unique number.

- Barcoding *historical* biological frozen items is not required. Once SciQuest ERM is rolled out in your area barcode labels should be applied to restricted biological items where possible.

- Barcode labels are 2D. If you require a different type of label e.g. Microtubes this is your responsibility to source. Advice can be sought from your DLP.

- If you are decanting /aliquoting into new containers, a new Barcode label should be applied.

- Should a chemical or restricted biological not have a University of Auckland Barcode Label applied, this must be bought to the attention of your DLP.

b. Scanners

- Scanners will be placed at convenient locations for ease of use.

- Additional Scanners, Printers, Barcode labels and Barcode Dispensers can be ordered through your SciQuest ERM team sciquest@auckland.ac.nz

c. Barcode Printers

- Barcode Label Dispensers to hold pre-printed Barcode Labels will be placed at defined delivery locations for ease of use.

- Barcode Label Printers are placed within the StockRoom. The StockRoom will generate Barcode Labels for the Barcode Label Dispensers on request.

3.   Searching for a Material

- Use the CAS in the first instance if available.
- Try to search using different synonyms for the material.
- Using keywords brings through more products when searching than just using the materials' name.
- Use wild cards which is an asterisk *before and/or after* the item described.
- If searching for biologicals use the Container Flex Field subtabs found on the search tab.
- If you prefer to use an external drawing programme this search option needs to be selected using user preferences (File>Preferences>Structure Search).
- If using this method files must be saved as either an MDL SD File (.sdf) or an MDL Molfile (.mol).

4.   Creating Materials

- Naming formats for newly created materials will be up to the individual lab, however some characters are unavailable in SciQuest ERM such as the Greek alphabet.
- Unique chemical libraries can be created for research group internal records. Access to these libraries can be restricted to their research group. This can be done by the Allocation field

Can I share my materials with another lab? - Sharing items and recovering costs

- Sharing items where appropriate is encouraged but is optional. If you need to recover costs it is agreed between the two interested parties at DLP level. To recover costs the DLP can organise it through faculty finance staff.
- Sharing items can occur between projects and research groups.
- Reports showing spend against your projects/cost centre are possible

5. Creating Shopping Carts

- When a Shopping Cart is created accurate information in the "Recipient" (Principal Investigator or DLP) field is extremely important in particular for MPI restricted items.
- Researchers can only see their own Shopping Carts. The Shopping Cart must be saved under an easily identifiable name and that name must be sent to your DLP for processing. See Training Manual for recommendations.

Orders

The DLP reviews Shopping Carts by copying them as new to check to see if any COP warnings are in place, saves the Requisition in SciQuest ERM and submits the Requisition number to STC via the portal or Uniservices via an email (process described below).

Submitting orders to UniServices

Please fill out the template linked below with the details of the requisition and email to purchasing@uniservices.co.nz.

https://www.auckland.ac.nz/content/dam/uoa/auckland/students/academic-information/postgraduate-students/sciquest-erm/useful-information/uniservices-request-template.docx

Can I change the delivery address for a PO?

Yes, however the change must be requested through your DLP and approved by your Hazard Approver.

What are hosted Catalogues?

- Some of the UoA key suppliers of laboratory products form the Hosted Catalogues. Price comparisons are able to be made. The majority of Hosted catalogue vendors deliver freight-free into store. Note that you cannot add freight to a Hosted Catalogue order, so this will be handled by the STC on invoice. Find out which suppliers charge freight [here](#).

- The twenty hosted catalogues are as follows:
  - ABCAM Australia Pty Ltd
  - AK Scientific, Inc.
  - Bio-Rad Laboratories NZ
  - ECP Limited
  - Fort Richard Laboratories
  - Global Science - a VWR Company
  - In Vitro Technologies
  - Interlab
  - John Morris Scientific Ltd
  - Lab Supply Ltd
  - Life Technologies New Zealand
  - Medi'Ray New Zealand
  - Merck Pty Limited
  - MicroAnalytix
  - MP Biomedicals New Zealand Limited
  - Roche Diagnostics
  - Scimed Limited
  - Sigma-Aldrich (New Zealand)
  - Thermo Fisher (New Zealand)
  - Total Lab Systems Limited

- The hosted catalogues are not a substitute for communicating with suppliers.
- All other PeopleSoft registered suppliers of chemicals, biologicals and lab based products should be available using the non-hosted catalogue process.

What are Non-Hosted Catalogues Suppliers?

a. All other PeopleSoft or Technology One registered suppliers that are not one of the twenty hosted catalogue suppliers of chemicals, biologicals and lab based products are referred to as Non-Hosted catalogues.

b. Non-Hosted catalogue item orders can only be made through SciQuest ERM if the Vendor is in PeopleSoft Financials or Technology One. If they are in these systems but not in

SciQuest ERM please contact sciquest@auckland.ac.nz to request they be added to the SciQuest ERM suppliers list.

c. If you need to purchase from a supplier not currently available in our purchasing systems you can request the vendor be loaded through a formal process through STC or UniServices purchasing.
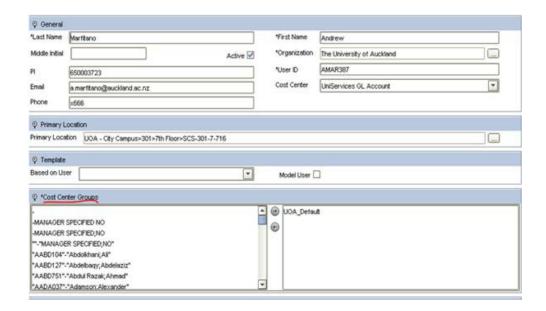
What is e-molecules?

It is a gateway to smaller chemical companies in SciQuest ERM and you can search on the e-molecules tab for a number of chemical building blocks.

Cost Centres and Project Cost Centres

- Cost Centres in SciQuest ERM are composed of your departmental cost centre, the PC - Business unit and your grant number.
- Costs Centres are assigned or changed by your PI or through your DLP. A DLP is responsible for filling out the SciQuest ERM Form on your behalf and submitting this form to the SciQuest Advisor at email SciQuest@auckland.ac.nz to set up permissions.
- UniServices have different Cost Codes to the University of Auckland. If you are UniServices you will be able to access UniService Accounts.
- A project code cannot be deactivated in SciQuest until it is deactivated in PeopleSoft.
- Primary Investigator Project cost centre groups are created automatically by financials. Other cost centre groups are created manually. These might be:
  - Department cost centres used by a Department, Faculty or research group.
  - Or a combination of Department and project cost centres used by a Department, Faculty or research group.
  - Or a specific set of cost centres assigned to a user manually.

When ordering Hazardous and Restricted Items

Some highly hazardous or restricted substances will require approval by the Hazard Approver.

Where can I find MSDS Information?

- MSDS information is not available in SciQuest. MSDS are available via Chemwatch GoldFXX database:

  http://www.library.auckland.ac.nz/databases/record/?record=chemweb

- Some manufacturers have Health and Safety data held in SciQuest ERM.

6.   Receiving

- Receiving is carried out one line item at a time.
- Receiving in SciQuest ERM automatically receipts the item in PeopleSoft Financials/Technology One.
- Closed or Cancelled Items do not appear in the Receiving Tab unless you select the outstanding Items radio button.
- If an item has been received in error contact STC or Uniservices

7. Receiving Orders

- Stock Room (Stores) will receive most parcels and receipt the items enclosed. Once receipted, an email to the Requestor is sent that the goods are available to collect. In special circumstances parcels will be delivered direct to the Receiving location in the lab.
- The recipient will receive an automated email to notify them of the arrival of the item.

8. Updating the Location of an item

- Scanning a Barcode will let you know where the item should be.
- If a substance is taken from one lab to another, it may need to be scanned in and out of locations; this is hazard dependent.

9. Locations

- Locations have been pre-determined in the SciQuest ERM application.
- Locations can be as detailed as freezer, cabinet and position in the box level if required.
- The location of an item can be updated when an item is received or has its current ownership transferred to another PI.
- DLPs have permission to add sub-locations. If the DLP needs to set multiple sub-locations contact the SciQuest Advisor. The SciQuest Advisor will provide a template to complete sub-location data information.

10. Disposing of an item

- Items can be disposed but the record remains in the SciQuest ERM system for regulatory purposes.
- There are different methods of disposal.

11. MPI Restricted Materials

You Must tick MPI materials true or false box otherwise all materials will default to MPI restricted

Will auditing by MPI still continue?

Auditing by external regulatory authorities will continue as per current process. Stock takes and audits will be made easier by SciQuest ERM.

SciQuest ERM Glossary

ERM	Enterprise Reagent Manager.
STC	Shared Transaction Centre receives all SciQuest Requisitions and processes them into Orders to Suppliers.
PeopleSoft	Purchasing system used by STC Finance.
MPI	Ministry of Primary Industries

Roles

DLP	The Designated Laboratory Person is responsible for validation and control of requests and communications with STC. Ensures quality, health and safety standards are adhered to and also receives and identifies the final location of goods.
Researcher	A researcher in SciQuest ERM is a PI, technician, or student
Super User	Uses SciQuest ERM a lot and is the first point of contact for minor issues.
Hazard Approver	Able to approve orders of Hazardous chemicals and biologicals which require extra precautions, permits and documentation.
Subject Matter Expert	Lead technical and content advisors to SciQuest ERM.
Stock Room Manager	The SciQuest role refers to logistics coordinators who are responsible for maintaining stockroom. They are able to receive and receipt orders, print detailed barcodes and affix them to Containers and generate Barcode Labels for the Barcode Label Dispensers on request.

Storage Areas

Stock Room	Stock Room is the new name for Stores. This is where most orders are delivered and stored.
Storage Area	Places where items may be stored but no wet lab activity is carried out. E.g. Freezer rooms
Repository	A dedicated online server folder for storing permits and associated documentation.

Other

CAS number	A unique number used to identify chemicals.
Biological	A material created from a living organism.
Container Flex Field	A field to record important details regarding your biological items.
Material	Any chemical or biological in the inventory system.
Container	Any vessel that holds a material.
Shopping Cart	Requisitions are saved in the form of a Shopping Cart. When a Shopping Cart is created accurate information in the "Requestor" (the Designated Lab Person) and "Recipient" (Principal Investigator) fields is extremely important, in particular for MPI restricted items, as the MPI transfer application is a legal document under the BioSecurity Act, and false information captured on the application could result in penalties under the Act.
Requestor	This is the Designated Laboratory person.
Recipient	This is the Principal Investigator or the project leader. In all cases the Principal Investigator is responsible for Health & Safety and Containment.
Receiving Locations	Primary delivery locations for receiving SciQuest orders into the university.
Closing an Order	An ordered Item with a status of "Received Partial" for which no further quantity will be received can be Closed.
Cancelling an Order	Ordered Items with a status of "Received Partial" or "Received Full" that are not to be received can be Cancelled.
Disposed	Container still has contents or is no-longer required and is disposed of.
Disposed Empty	Container is empty and is disposed of.
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. The format was originally developed and published by Molecular Design Limited (MDL). MOL is another file format from MDL.

Spend Director	See Hosted Catalogues.
Hosted Catalogues	A number of suppliers form the Hosted Catalogues, 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. Freight is included and is free into Stock Room for most hosted catalogues.
	All other PeopleSoft registered vendors that you use will still be available using the non-hosted catalogue supplier process.
	Spend Director is a name also used for describing Hosted Catalogues in the Stock Room module.
Non- Hosted Catalogues Suppliers	Ordering Non-Hosted catalogue items can only be made through SciQuest ERM if the Vendor is loaded in PeopleSoft Financials. In the cases where the Supplier cannot be found then a formal process to establish the supplier must be undertaken with STC.
e-molecules	A gateway to search for smaller chemical companies.

SciQuest ERM

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