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**

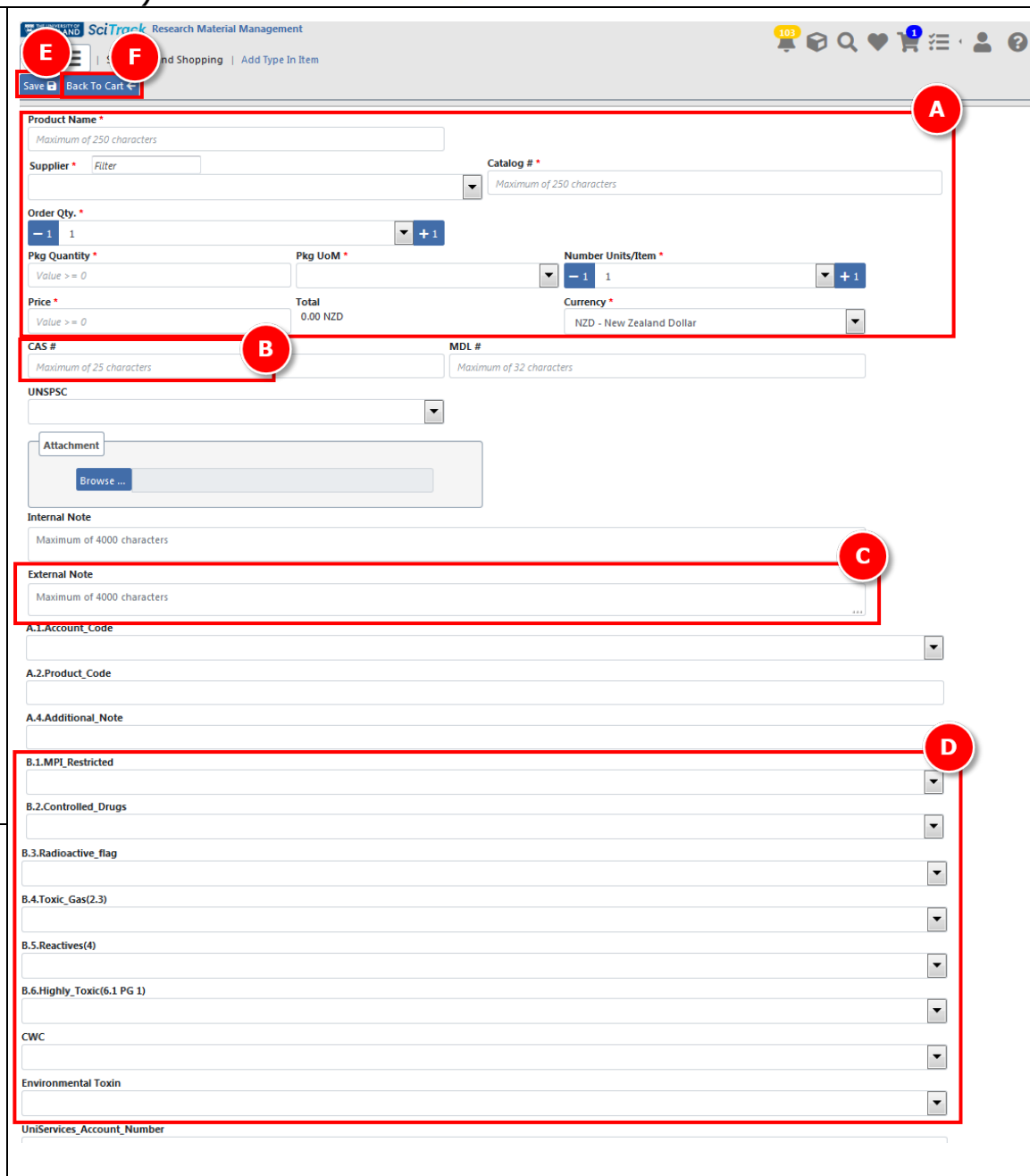| Steps	Screenshots

1. Shopping Cart
 	
  A. Click **Shopping Cart**.
  B. Click **Add Type In 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 can 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. Otherwise leave these fields blank.

E. Click **Save.**

F. Click Back To Cart once you are finished adding items.
- Note only one supplier and currency can be used 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.

3. Review shopping cart

A. Optional – these are click icons to **Delete**, or **Edit Item**, see similar materials in stock, or view SDS. See the appendix for a description of each icon.

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

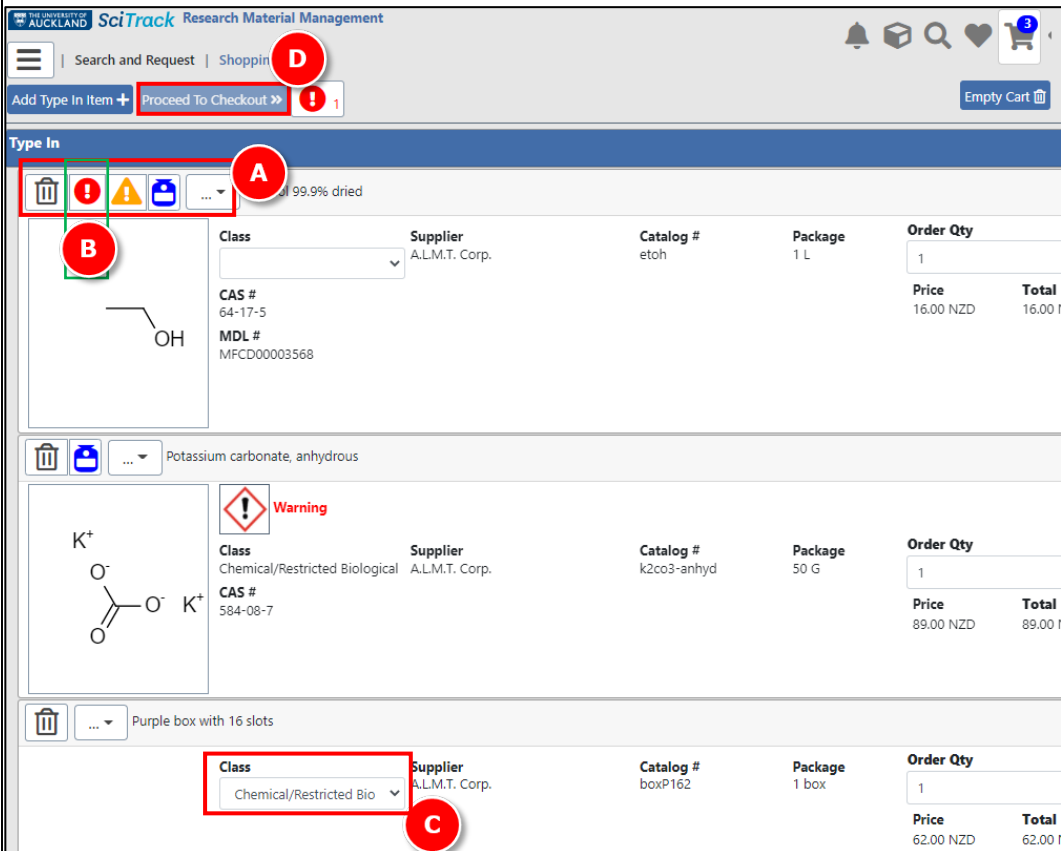C. **Select the correct material class.**

Choosing a material class

If an item has not been purchased before, you must select an appropriate Material Class before clicking Proceed to Checkout. These are the 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/Restricted Biological** and require a barcode.

➔ 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).

➔ Material classes can be changed by editing the material in Material Search. *Please see the Quick Guide **11. Creating Materials and Containers** for instructions.*

D. When finished, click Proceed to Checkout

❗ <u>Matching Materials</u>

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

First click the exclamation icon ❗ next to item name. Then click the wrench icon.

➢ Select the most accurate material match by selecting the radio button next to the material name. Then click **Select** to complete the matching process.

➢ For chemicals, ALWAYS select a material with a CAS number. Usually, the one with the most hazard signs is the right one!

➢ If no suitable match is shown, you can try searching for something more appropriate.

Otherwise tick "**No Suitable Match Listed, Create Material**". Please do not to choose this option for anything with a CAS number, unless you have no choice.

Actions Required

Item matches multiple materials.

Fix

Match Material - ETHANOL 96% REAG. PH EUR2,5 L
CAS # 64-17-5   X

Warning

Search Terms   Search 🔍

☐ No Suitable Match Listed, Create Material

⦿ Ethyl alcohol, Pure 64-17-5 MFCD00003568 Danger Controlled Hazardous

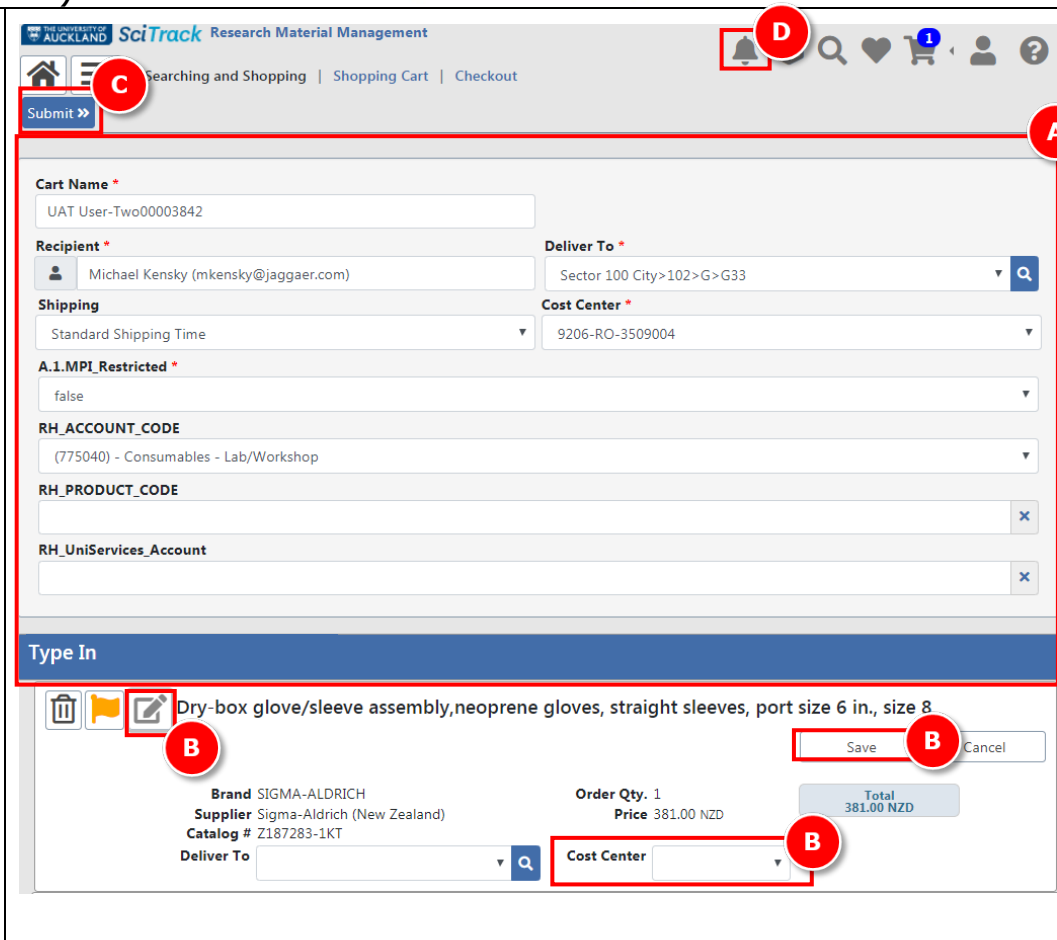○ ETHANOL ABSOLUTE ANALAR NP ACS/R.PE 64-17-5 MFCD00003568

Select ✔   Close ✖

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 <u>**Save**</u>
• Note: Only cost centers owned by the recipient of the cart can be selected. Cost centers of other recipients cannot be used on the same cart.

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.

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".**

6. DLPs Submit carts to purchasing

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

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

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

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

| 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. Edit carts, track carts and reorder".

Appendix:

Field Name	Description
Recipient*	The recipient is the person who the item will be addressed to. **Only staff members 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 will default based on the building you choose as the delivery location. This is the main inwards goods or delivery point for the building. For example, if you pick room 502-201 as the delivery location, the PO will default to the delivery address for building 502 which is 501-B33, 85 Park Avenue.
Cost Center*	The Cost Centres displayed are those assigned to the Recipient. If a recipient's codes are missing, please create a Staff Service Centre ticket to update SciTrack cost centres.
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 product code associated with the grant, e.g. A76x. Do not use this field for any other codes please
RH_ACCOUNT CODE	Select the GL Account 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:

⚠️	View warnings and Codes of Practice associated to the material. A link to a COP is given only for high-risk materials.	🛑	Click to see what action is required to submit your cart. Click the Fix button 🔧 to take action.
📦	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 after you submit the cart. If you are a DLP, your carts will not require DLP approval.