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.
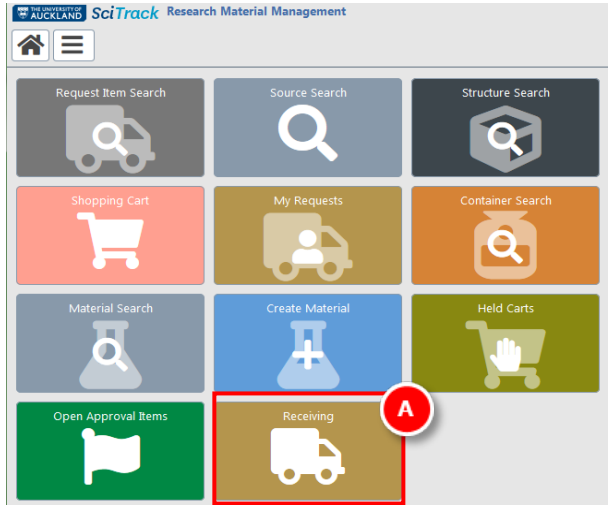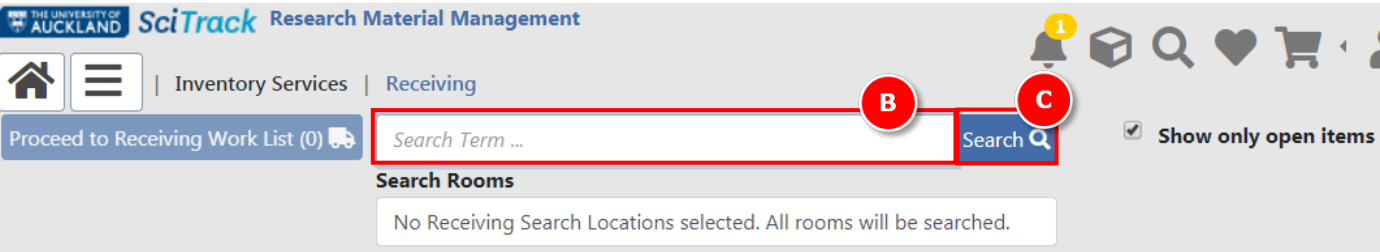
- **Receipting** (**aka receiving**) is sometimes completed in the inwards goods store. Otherwise items should be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP or requestor for all barcoded items.
- When an item is receipted in SciTrack, it will be automatically receipted in PeopleSoft Financials/UniServices Purchasing within 1-3 days.

1. Receipting part 1: Search for a purchase order
2. Receipting part 2: Select items to receive
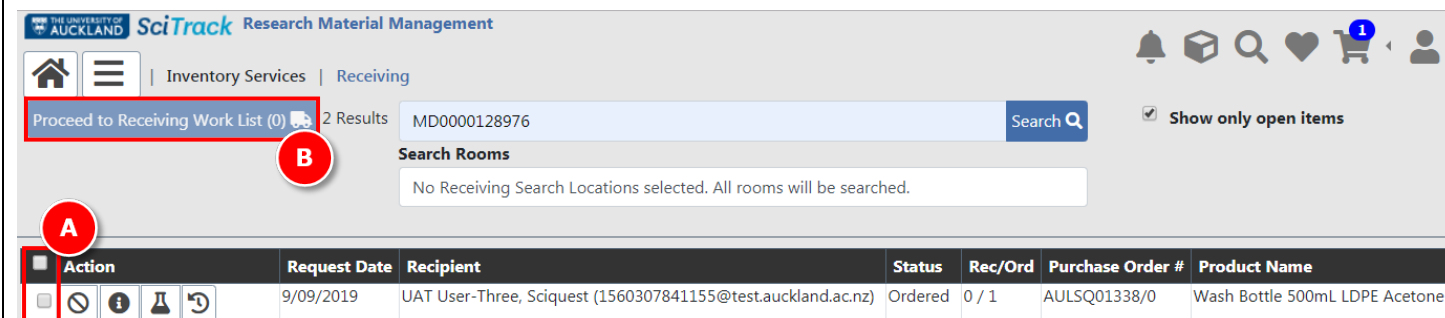**3. Receipting part 3: Review and receive an item**
4. Transfer barcoded items

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

2. Select items to receive

A. Check the items you want to receive.

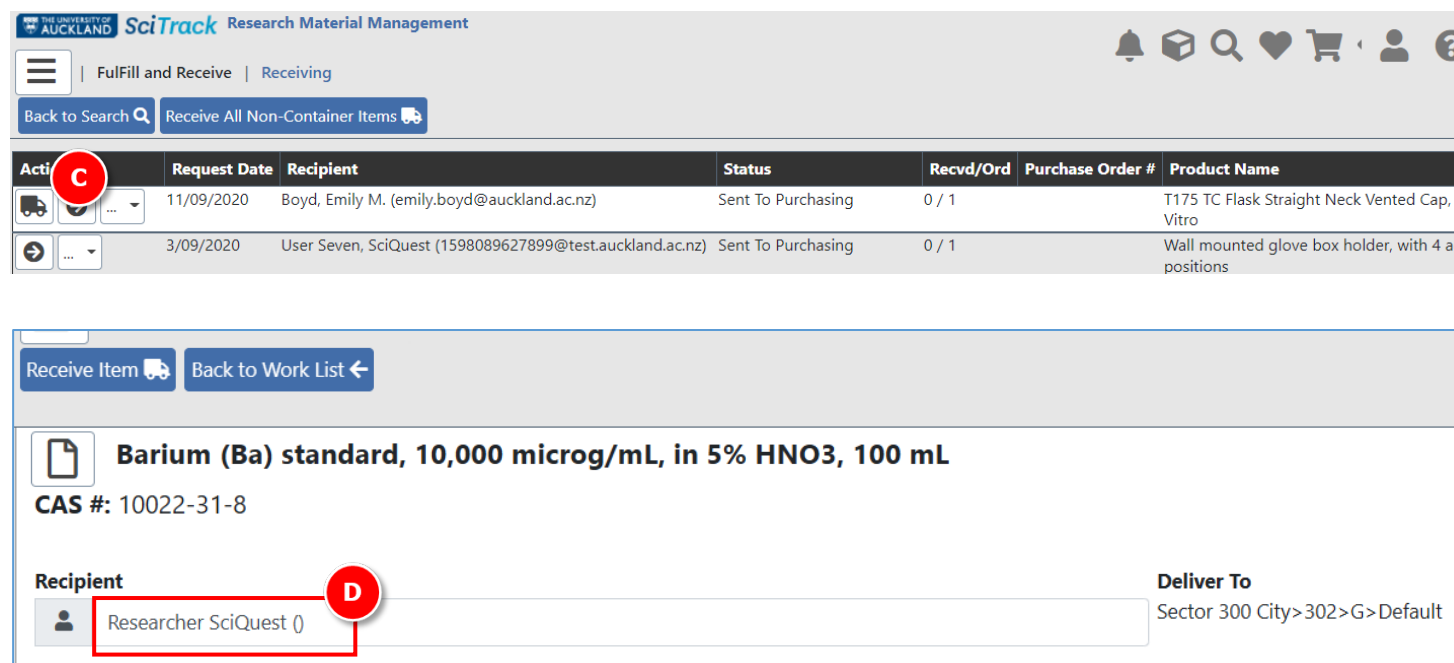B. Click **Proceed to Receiving Work List (2)** 🚚 to add selected items to Work List.

Note:

➤ 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

C. **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 continue to receiving.

D. For items with barcodes that will create a container in SciTrack, you can change the owner here. Select the Recipient field, and type either the first or last name of the new owner.

Continued on next page...

E. Change the **Quantity to Receive** value if you have received a partial order.

F. Make sure **Create Containers** is <u>checked</u> for all chemicals and restricted biologicals. Uncheck it to receive a non-hazardous item without barcodes (DLPs only).

Important:
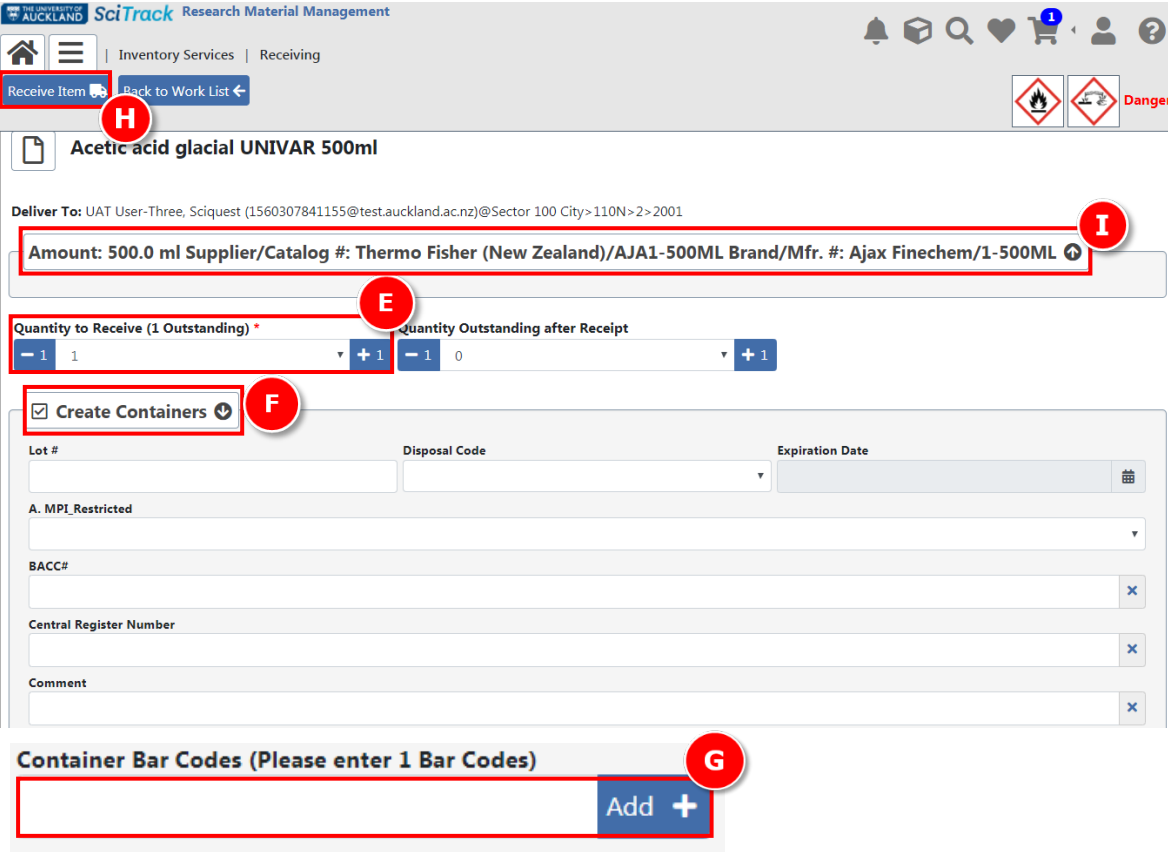
➢ Please make sure you only uncheck Create Containers (**F**) for non-hazardous items.

➢ 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.

G. Scroll to the bottom of the page to enter/scan the pre-printed barcode to be attached to the item. Click **Add ➕** after each bar code.

H. Click **Receive Item 🚚** to complete the receipt.

Note:

➢ Click Package Information button to open Package Information Details pane and edit if required (I). Expanding this section lets you change the Lot Size, which determines how many barcodes are asked for.

SciTrack Research Material Management

Inventory Services | Receiving

Receive Item 🚚 | Back to Work List ← (H)

Acetic acid glacial UNIVAR 500ml   Danger

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 (I)

(E)

Quantity to Receive (1 Outstanding) *
➖ 1 | 1 | ➕ 1

Quantity Outstanding after Receipt
➖ 1 | 0 | ➕ 1

☑ **Create Containers** 🕐 (F)

Lot #

Disposal Code

Expiration Date

A. MPI_Restricted

BACC#   ✕

Central Register Number   ✕

Comment   ✕

Container Bar Codes (Please enter 1 Bar Codes) (G)
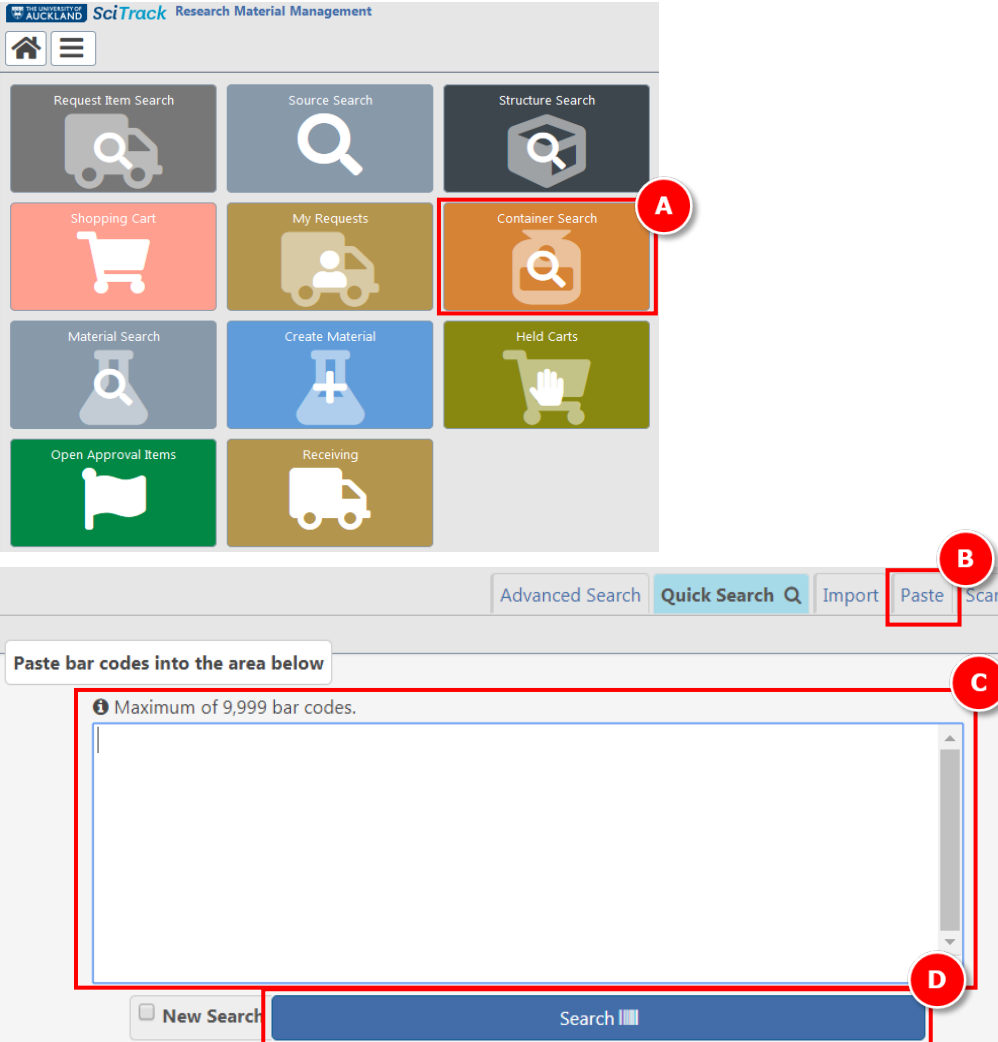
Add ➕

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**.

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"