

# 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.

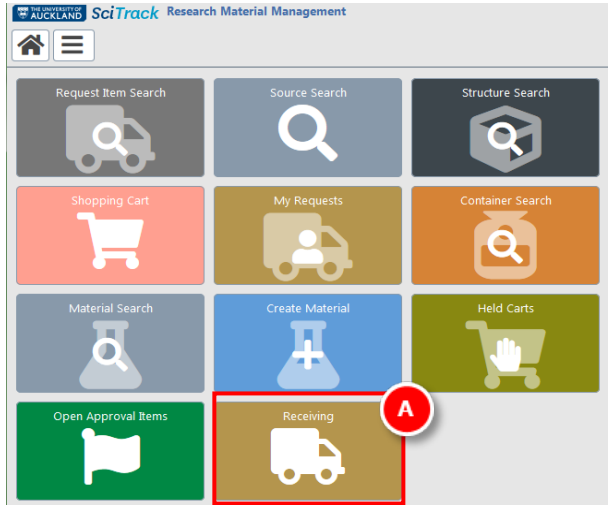
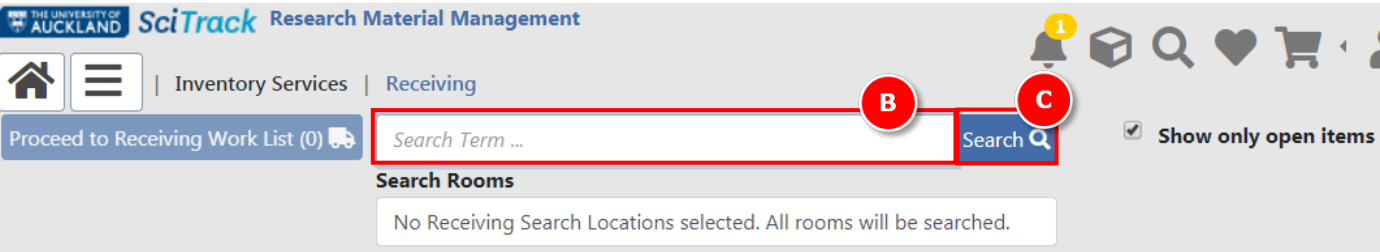
- **Receipting (aka receiving)** is sometimes completed in the inwards goods store. Otherwise items should be receipted by a DLP.
- **Transferring** items to their correct location and owner must be completed by the DLP or requestor for all barcoded items.
- When an item is receipted in SciTrack, it 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

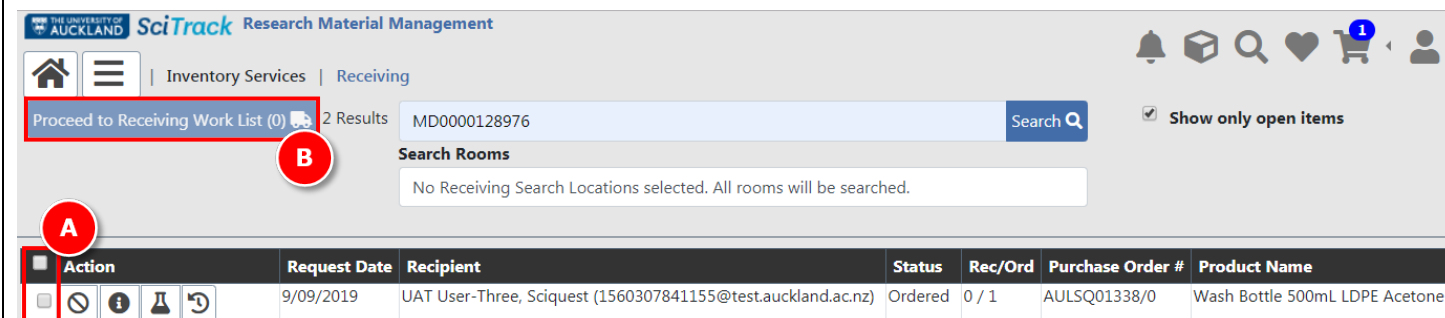
### 4. Transfer barcoded items

Steps	Screenshots
<p><b>1. Search for a purchase order</b></p> <p>A. Click <b>Receiving</b>.</p> <p>B. Enter P.O. number or cart name in the <b>Search Term</b> field.</p> <p>C. Click <b>Search</b>.</p> <p><b>Tip:</b> Uncheck the “Show only open items” box to view orders that have already been receipted.</p>	 <p>The screenshot shows the SciTrack Research Material Management dashboard. A grid of buttons includes 'Request Item Search', 'Source Search', 'Structure Search', 'Shopping Cart', 'My Requests', 'Container Search', 'Material Search', 'Create Material', 'Held Carts', and 'Open Approval Items'. The 'Receiving' button, which features a truck icon, is highlighted with a red border and a red circle containing the letter 'A'.</p>  <p>The second screenshot shows the search interface. The breadcrumb path is 'Inventory Services   Receiving'. A search bar contains the text 'Search Term ...' and is highlighted with a red box and the letter 'B'. To its right is a blue 'Search' button with a magnifying glass icon, highlighted with a red box and the letter 'C'. A checkbox labeled 'Show only open items' is visible on the right side of the interface.</p>





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## 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.





The screenshot shows the SciTrack interface with a search bar containing 'MD0000128976' and '2 Results'. Below the search bar is a table with the following data:

Action	Request Date	Recipient	Status	Rec/Ord	Purchase Order #	Product Name
   	9/09/2019	UAT User-Three, Sciquest (1560307841155@test.auckland.ac.nz)	Ordered	0 / 1	AULSQ01338/0	Wash Bottle 500mL LDPE Acetone l

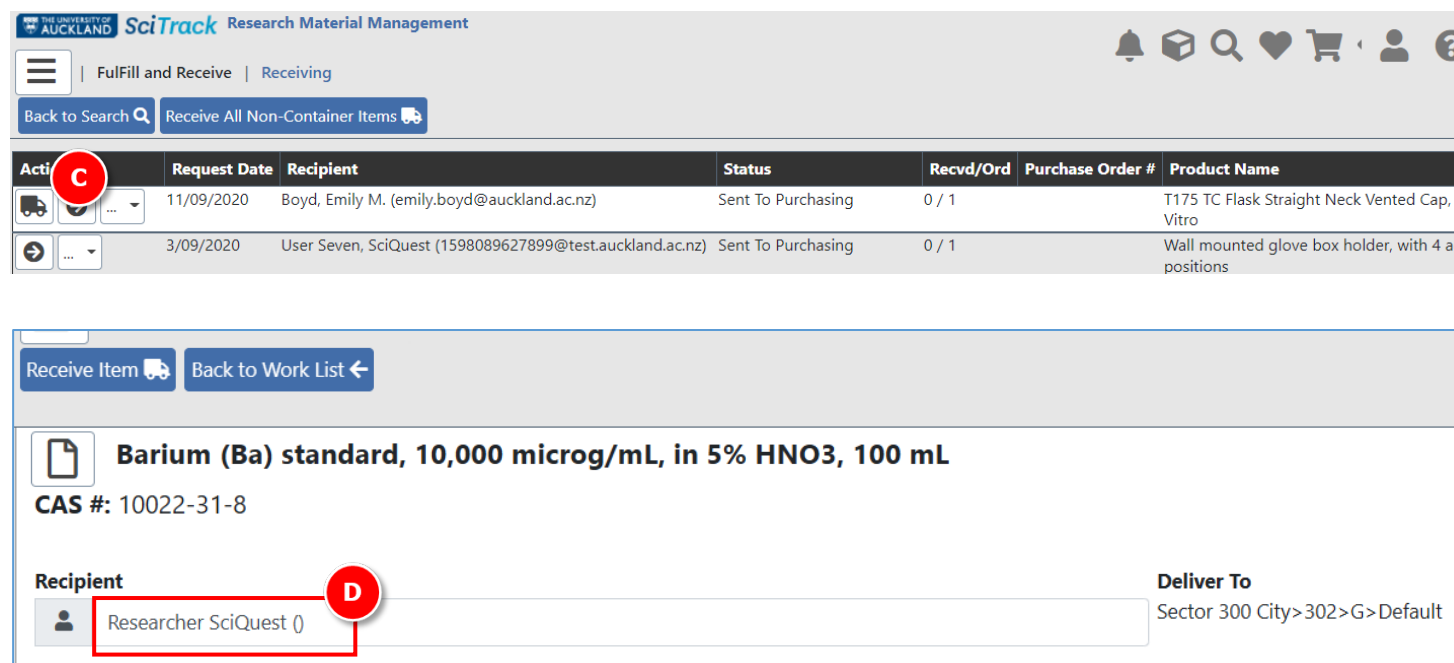
### Note:

- 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.



The screenshot shows the 'Fulfill and Receive' section of the SciTrack interface. It displays a table of items with the following data:

Action	Request Date	Recipient	Status	Recvd/Ord	Purchase Order #	Product Name
   	11/09/2020	Boyd, Emily M. (emily.boyd@auckland.ac.nz)	Sent To Purchasing	0 / 1		T175 TC Flask Straight Neck Vented Cap, 5p Vitro
 	3/09/2020	User Seven, SciQuest (1598089627899@test.auckland.ac.nz)	Sent To Purchasing	0 / 1		Wall mounted glove box holder, with 4 adj positions

Below the table, there is a detailed view of an item: **Barium (Ba) standard, 10,000 microg/mL, in 5% HNO3, 100 mL**. The CAS # is 10022-31-8. The Recipient field is highlighted with a red box and contains 'Researcher SciQuest ()'. The Deliver To field is 'Sector 300 City>302>G>Default'.

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

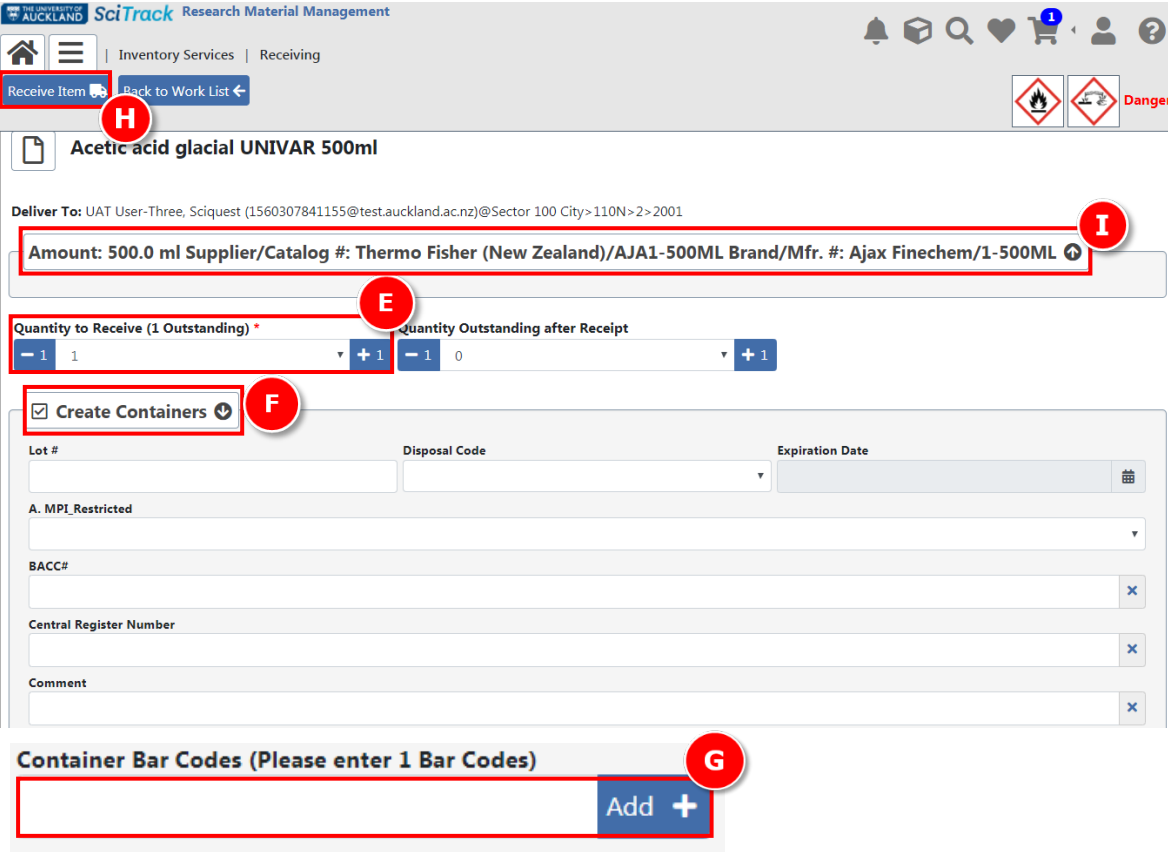
- Please make sure you only uncheck Create Containers (F) for non-hazardous items.
- Unchecking Create Containers on chemicals or restricted biologicals may breach the Health and Safety at Work Hazardous Substances Regulations, HSNO Regulations and the University Health, Safety and Wellbeing Policy.

- 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.**



UNIVERSITY OF AUCKLAND SciTrack Research Material Management

Inventory Services | Receiving

Receive Item **H** Back to Work List

**Acetic acid glacial UNIVAR 500ml**

Deliver To: UAT User-Three, Sciqest (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**

Quantity to Receive (1 Outstanding) \* **E** Quantity Outstanding after Receipt

- 1 1 + 1 - 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:

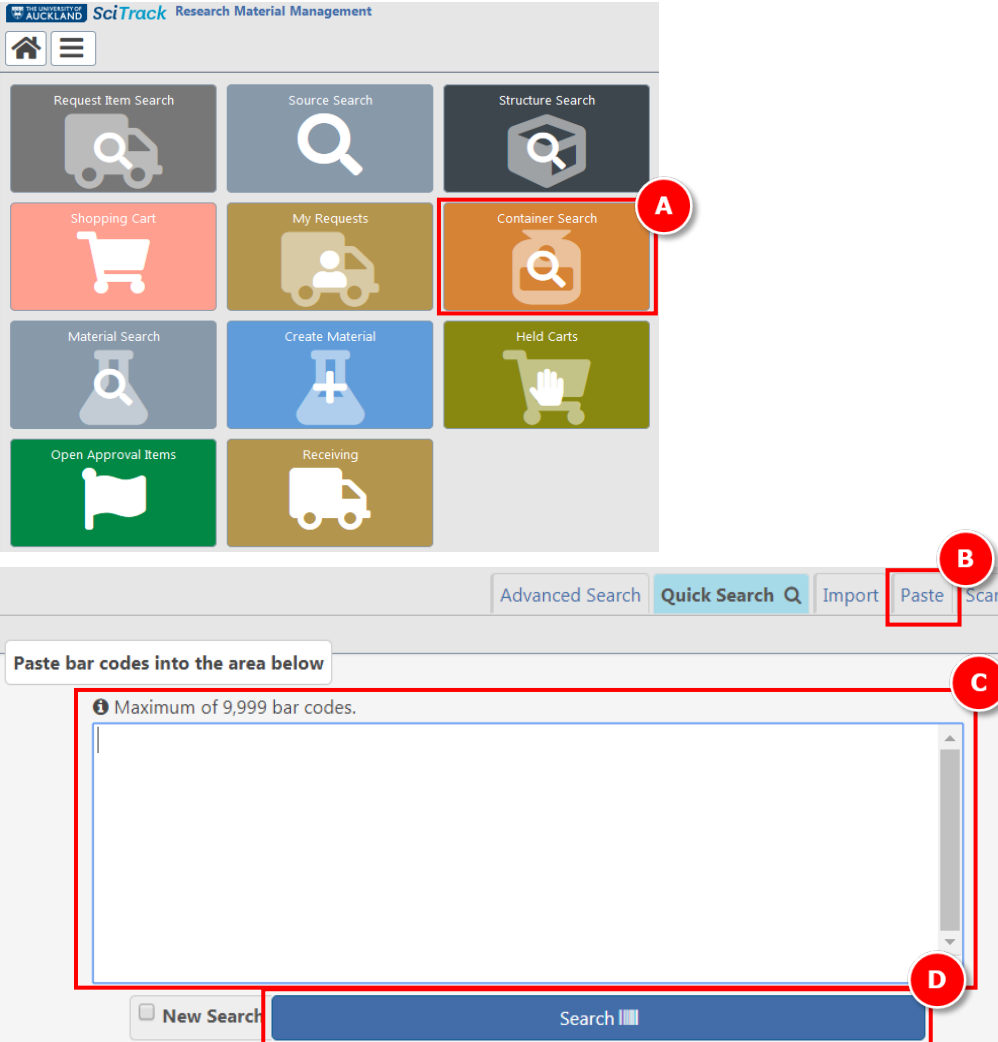
- If you receive a partial order, the Quantity Outstanding after Receipt will automatically calculate what is outstanding.
- If the quantity received is less than what is outstanding and you are not expecting any further receipts for the item, change Quantity Outstanding after Receipt to 0.

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### 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 navigation bar with a home icon and a menu icon. Below this is a grid of functional buttons: Request Item Search, Source Search, Structure Search, Shopping Cart, My Requests, Container Search (highlighted with a red box and callout 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 Q, Import, Paste (highlighted with a red box and callout B), and Scan. Underneath the search bar is a text input area labeled "Paste bar codes into the area below" with a note "Maximum of 9,999 bar codes." (highlighted with a red box and callout C). At the bottom, there is a "New Search" checkbox and a "Search" button (highlighted with a red box and callout D).

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- 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"

