SciTrack Quick Reference Sheet (Version 3.0)

Create and submit a SciTrack shopping cart[1]

1. Click **Source Search,** then click **External**. Enter your search term then click **Search**.
2. In the next window, click **Hosted** to see the Hosted Catalogue results, or **e-molecules** to see results from specialty chemical suppliers.
3. Click 🛒 to add the item you want to your shopping cart. If you can't find what you want, go to step 4.
4. Use the navigation pane in the top right corner:

   ➔ To start a new search, click 🔍
   ➔ **If you can't find the item, you need** click 🛒
   ➔ When you are finished adding items click 🛒
5. To add items to your cart that are not available in the search results, click **Add Item +** to add type-in items to your cart (all cart items must be from the same supplier).
6. Select the appropriate material class for each item. Then click **Proceed to Checkout**.
7. Complete the fields and click **Submit**
   ➔ The drop-down list of cost centres shows those associated with the selected recipient.
   ➔ To change recipient: click the recipient field, **type EITHER** the first or last name of the person you want to select, **wait** a moment for the results to appear, and **click** the correct person's name.
8. **To complete the cart request you need to**:
   a. Ask your DLP to approve your cart (if you are not a DLP yourself).
   b. Submit an e-quote request form to the STC.

Create and submit a SciTrack Stockroom order[2]

1. Click **Source Search,** then click **Internal**. Enter your search term then click **Search**.
   ➔ To see all available stockroom items, type a space as the search criteria.
2. In the next window, click **Stockrooms**.
3. Click 🛒 to add the item you want to your shopping cart.
4. Use the navigation pane in the top right corner:

   ➔ To start a new search, click 🔍
   ➔ When you are finished adding items click 🛒
5. Adjust item quantity then click **Proceed to Checkout**.
6. Complete the fields and click **Submit**

(continued in next column…)

➔ **UOA_Default is not a valid cost centre.** To find the required cost centre, you may need to change the recipient's name to the person who owns the grant you wish to order from:
   Click the recipient field, **type EITHER** the first or last name of the person you want to select, **wait** a moment for the results to appear, and **click** the correct person's name.
7. No further steps required: collect your order from the Stockroom.

Receipting SciTrack orders[3]

1. Click **Receiving** then type the P.O. number into the Search Term field and click **Search**.
2. **Check** the line(s) you want to receipt and click **Proceed to Receiving Work List**. **Note: the receipting is not finished yet!**
3. If the **truck icon** is available, click this to complete the receipt. Otherwise click the **arrow icon** to open the receiving window and follow the steps below.

4. If the item does not require barcodes, DLPs can uncheck the Create Containers button. If the item is a chemical or restricted biological, scroll to the bottom of the page and type or scan in enter the required number of barcodes.
5. Click **Receive** icon then repeat with any other line items.
6. **All barcoded items must be transferred** to the correct owner and location. See "Search inventory…" section below for instructions.
   ➔ Note that SciTrack purchase orders do **not** need to be receipted separately through the STC.

Track cart status, edit or reorder carts[4]

1. Click **My Requests** to see the status of your shopping cart.
   ➔ "Held carts" have not yet been picked up by the STC and can be edited.
   ➔ Items in carts of any other status cannot be edited. To **reorder items in a new cart,** click 🔁.
2. To **edit held carts**, click the **Held Carts** tile and search for the cart by holding CTRL-F then typing the cart name.
   Click 📂 to load the cart. Make any changes then click **Proceed to Checkout** and **Submit**.

Search inventory and transfer or dispose[5]

1. Click **Container Search** and choose a search type
   ➔ Use paste or scan to search by barcode(s)
   ➔ To search any location in Advanced Search, click 🔍 next to the location drop-down.
2. Enter or select the criteria, and click **Search**
   ➔ To edit, replicate, or view container information, click the appropriate button on the action bar.
   ➔ To transfer or dispose, **select the checkbox** next to each item, then click **Operations** to choose the task.

For full instructions please refer to the Quick Guides on the SciTrack website: [1] Guides #3 and/or #4; [2] Guide #6; [3] Guide #9; [4] Guide #7; [5] Guide #10

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DLP approval (for DLPs only)[6]

➔ Carts created by DLPs do not require approval.
➔ DLPs should only approve carts that they have been specifically asked to approve by the cart creator.

1. Click **Open Approval Items** and search for the cart by holding CTRL-F then typing the cart name.

2. Click ☑ to approve item or ⊘ to reject. Every item needs to be approved individually.

DLP approval checklist:

✓ Correct (and allowed) **cost centre**/RH account code.
✓ **Recipient** is either the PI or a DLP (**not a student**).
✓ Ordered items and quantities are appropriate.
✓ The laboratory has facilities to store the item safely.
✓ Restricted biologicals are flagged as MPI Restricted, and the appropriate permits have been obtained.
✓ Highly hazardous or restricted chemicals are flagged as hazardous in SciTrack, and are allowed to be purchased.

FAQs[7]

How can I get cost centres added to SciTrack?
Please submit a ticket to IT Services to request additional cost centres.

Note: Only staff members may have valid cost centres assigned to them in SciTrack. **To order from a PI's cost centre**, you need to select the PI as the recipient of your cart.

Newly activated grants are automatically added to SciTrack under the PI's name. DLPs with access to a PI's account group will also automatically gain access to their new grants.

How can I be a DLP?
Please submit a ticket to IT Services to request a change in role.

Your request will be reviewed to check that you are an eligible staff member (not on a casual contract), and that there is a need to have an additional DLP in your area.

Do I have to raise purchase orders for maintenance or non-item requests through SciTrack?
Yes if the request is through a SciTrack-listed supplier (find the SciTrack suppliers list on the SciTrack website). Create a type-in purchase request in SciTrack (see quick guide #4).

DLP can't find a cart in the My Approvals window.
These are the common reasons:

- Carts will not show in My Approvals if someone has loaded the cart. Search for the cart in the Held Carts screen (hold CTRL-F to open the browser search bar). If the "Loaded" or "Loaded by me" tick shows, click the shopping cart unload button 🛒 to unload it.

- The cart could already have been approved. The cart creator can check the approval status in **My Requests** by clicking the flag 🚩 next to the item.

- DLPs can only see carts created in their own Sector.

Why can't I scan pre-printed barcodes for items I am receiving (receipting) or creating in SciTrack?
Please check your preferences in SciTrack are correct:

1. Click 👤 in the top right menu and select **User Preferences**.
2. **Pre-Printed Bar Codes** must have Yes selected (highlighted in blue) to be able to scan in barcodes.
3. Click **Save** if you have made a change.

If your preferences were already correct, you may have missed a step in receipting. Please refer to quick guide #9 to make sure you are completing all steps for receipting.

How can I make a container for an item that was not purchased through SciTrack, or doesn't have a barcode?

1. Search for the material in the **Material Search** window. If it does not exist, create a new material.
2. Create a new container based on that material. Please follow quick guide #11 for instructions.

How can I cancel or delete a cart?
If you have submitted a request to the STC for the cart, please contact them to cancel your request.

There is no need to cancel or delete your cart, but here is how you can if you want to clean up your records:

➢ If the cart status is **Held Cart,** then please email scitrack@auckland.ac.nz with the name of your cart.

➢ If the cart status is **Sent to Purchasing** or **Ordered:**
   1. Go to the Receiving window and type in the cart name or PO number and click Search.
   2. Click the ⊘ button to cancel receiving on each line you wish to cancel
   3. Note that this will not cancel the line on the purchase order, and **it will not inform the STC or the supplier about the cancellation**.

How do I add restricted biologicals to SciTrack?
Add less than 10 new biologicals (not purchased through SciTrack)
1. Search for the material in the **Material Search** window. If it does not exist, create a new material.
2. Create a new container based on that material. Please follow quick guide #11 for instructions.

If you need to load more than 10 items at once, you may fill out the "Bulk biologicals upload template" on the SciTrack website and email this to scitrack@auckland.ac.nz. Instructions are included in the template file.

For more information about restricted biologicals in SciTrack, please see the SciTrack Biologicals Quick Reference document.

Please visit the University of Auckland SciTrack website for more information including quick guides and video demos.

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[6] See SciTrack Quick Guide #8 for more instructions; [7] For more FAQs, search the Staff Service Centre knowledge bank on the staff intranet.