7. Edit carts, track carts, and reorder

Overview

- The **Held Cart** tile shows external shopping carts that have not been picked up by the STC or UniServices Purchasing.
- The **My Requests** tile shows shopping carts that have been picked up by the STC or UniServices Purchasing, and submitted Stockroom carts.

**1. Use Held Cart to edit or review carts**

**2. Unload held carts**

**3. Review Shopping Cart Submitted Reports**

**4. Use My Requests to track orders and reorder your own carts**

**5. Use Request Item Search to track and reorder other users’ carts**

<table>
<thead>
<tr>
<th>Steps</th>
<th>Screenshots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Use Held Cart to edit or review carts</strong></td>
<td>![Screenshot of Held Cart tile]</td>
</tr>
<tr>
<td>Held carts can only be edited <strong>before</strong> STC/UniServices purchasing pick up the cart. If you need to make changes after the cart has been picked up, you will need to use <strong>My Requests</strong> to reorder the items in a new cart (see <strong>Step 4</strong>).</td>
<td>![Screenshot of Held Cart with cart search]</td>
</tr>
</tbody>
</table>

A. **Click Held Cart.**

B. **Search for cart by holding CTRL-F** and then typing the cart name or creator name.

C. **Click 🛒 to load the cart.**

**Important:**

- Once you load a cart it is very important to proceed to checkout and submit the cart.

If you accidentally close the **Held Cart** window before submitting the cart, you will need to unload it (see **step 2** below).
D. Make any required changes and click **Proceed to Checkout**.
E. Make any required changes and click **Submit**.

**Note:**
- If you have the Researcher (default) role, you can view all Held Carts for which you are the Creator or Recipient. DLPs can see all carts in their sector.
- Any changes that you make to a cart are automatically saved as you go, and you cannot revert back to the original cart.

2. Unload held carts

**Note:**
- Before you start shopping it is important to make sure you don’t have another cart loaded. You can see this on the homepage where the shopping cart quick icon shows how many items are in your cart 🛒. You should unload the existing cart first as follows:

A. Click **Held Cart** tile.
B. Any carts you have loaded will appear at the top of the page with **Loaded by me** icon.
C. Click 🛒 to unload the cart.
3. Review Shopping Cart Submitted Reports

A. After submitting a cart, a report is generated. To find this, click the notification bell.
B. Open the report by clicking 📚.

4. Use My Requests to track orders and reorder

A. Click My Requests.
B. Change the Request Period or Status to see more items.
C. Click 🛒 to add items to a new cart.
D. Complete the cart (refer to SciTrack Quick Guides “3. Hosted Catalogue Purchasing” or “4. Type In Purchases”).

➢ See the order status descriptions in the appendix

➢ Click the icon to see whether it the item has been DLP approved yet.

Notes:

➢ Reordered items will be added to your shopping cart with a quantity of 1, regardless of original quantity
➢ Reordering items does not replicate the recipient or account information from the original cart. The cart will also have a new name.
➢ Note that items in held carts cannot be reordered in My Requests until the cart has been picked up by purchasing staff.
➢ Click the 📚 icon to see whether it the item has been DLP approved yet.
5. Use Request Item Search to track and reorder other users’ carts

A. Click Request Item Search
If you don’t see this tile on your homepage, add it by following instructions in quick guide “2. Configure preferences”

B. Search by cart name or PO number

OR

C. Do an advanced search

- The User field includes the creator or recipient of a cart. Type either a first or last name and select the user from the list that appears.
- Cost center must be exact or use wildcards *. Accepted formats are (e.g) 4080-UOA-09123 or 9145-RO-3234567
- Multiple cart statuses or types may be selected. Click on one from the drop-down list, and repeat to add more.

D. Click to find details of the order, including whether it has been DLP approved

E. Options are available to sort or export the results

F. Click to add items to a new cart.

G. Complete the cart (refer to SciTrack Quick Guides “3. Hosted Catalogue Purchasing” or “4. Type In Purchases”).

Notes:
➢ Reordered items will be added to your shopping cart with a quantity of 1, regardless of original quantity
➢ Reordering items does not replicate the recipient or account information from the original cart.
### Appendix

<table>
<thead>
<tr>
<th>My Requests Item status</th>
<th>Description</th>
<th>Can item be re-ordered?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New</strong></td>
<td>Stockroom cart that has not been fulfilled yet</td>
<td>No</td>
</tr>
<tr>
<td><strong>Held Cart</strong></td>
<td>Cart has not been picked up by the STC or UniServices purchasing. Note that you need to raise a request for this to happen.</td>
<td>No- may be edited by going to Held Cart</td>
</tr>
<tr>
<td><strong>Sent to Purchasing</strong></td>
<td>Has been picked up by the STC or UniServices purchasing. Once a purchase order is successfully raised, it becomes Ordered</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Ordered</strong></td>
<td>A purchase order has been successfully raised.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Received Full/Partial</strong></td>
<td>The item has been receipted (or fulfilled by the Stockroom if it is a stockroom order)</td>
<td>Yes</td>
</tr>
</tbody>
</table>