3. Hosted Catalogue Purchasing

Overview
This quick guide will show you how to purchase items from the ERM Hosted Catalogues. The list of suppliers with Hosted Catalogues can be found on the ERM website: https://www.auckland.ac.nz/en/students/academic-information/postgraduate-students/sciquest-erm/useful-information.html

1. Source Search
2. Add items to shopping cart
3. Review shopping cart and add Type-in items
4. Checkout and Submit
5. DLP Approval
6. DLP submits cart to purchasing team

Steps | Screenshots
--- | ---
1. **Source Search**
   A. Click **Source Search**.
   B. Click **External**.
   C. Enter search term.
   D. Click **Search**.
   E. Click **Hosted** or **eMolecules** to view results.
     - eMolecules represents a group of specialty chemical suppliers

Searching Tips:
- Use search operators to refine your search such as AND, NOT, OR, "" for an exact search, or * for a wildcard. Searching by CAS number is recommended for chemicals to reduce the number of search results.
- Selecting **Labs** will display the containers in the University of Auckland inventory, and **Stockrooms** displays items purchasable from the University Stockrooms. **Preferred sources** for these searches can be set in the User Preferences page.
2. Add items to shopping cart

A. Click 🛒 to add item.

Optionally:
- **Filter**: Apply filters on the left hand side by clicking 🍀 after choosing parameters. Click ✖️ to clear input.
- **Sort**: Click 📅 at the bottom right to sort results.
- **New Search**: Click 🔍 to find other items to add to your cart.

**Tips:**
- For additional information about an item, click 🛒.
- To add items to your Favourites, click 💘.
- The number of items is shown in your shopping cart 🛒.
- To export the search results, click 📄.
3. Review shopping cart and add Type-in items

A. Click 🔄 to view cart.
B. View/Edit item details:
   - Select order quantity.
   - Click item name to delete or edit details.

Quotes: If you have a quote, you need to 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.

C. Add type-in item to cart, if required.
D. Complete any required actions.
E. Click Proceed to Checkout.

Note:
- Only one supplier and currency per cart.
- If a warning flag does not appear for a hazardous chemical, it is important to set the correct hazard flag to TRUE under Edit Details. (See glossary for our definition of a hazardous chemical).

Matching Materials
If your item can be matched to multiple materials, you will be prompted to choose the most suitable material before submitting the cart.
- If no suitable match exists, tick “No Suitable Match Listed, Create Material”.
- Otherwise, select the radio button next to the item, then click Select to complete the matching process.

In ERM 9.3, you have the option to add a Type-in (Non-Hosted Catalogue) item from the same supplier to a Hosted Catalogue order. Please see the ERM 9.3 Quick Guide “4. Type In Purchases” for more detail.
4. Checkout and Submit

A. Complete the fields (refer to Appendix for more information on the fields).

   ➢ 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 unless 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 Save.

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 ERM.

- DLPs please see the ERM 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.
   - b. Enter **cart name** into the **ERM cart name** field (e.g. Boyd00043128).
   - c. Attach supporting documentation for the supplier where required, e.g. MPI import permit.

B. **OR** Submit **UniServices** orders to UniServices Purchasing:
   - a. Fill out **UniServices Request Template** found on the [University ERM website](https://www.form.auckland.ac.nz/en/staff/financial-services/e-quote-purchase-order-request.html/)
   - b. Email request to purchasing@uniservices.co.nz.

**Note:**

- To view or edit a cart after clicking Submit, please see the ERM Quick Guide "7. Track orders and reorder".
## Appendix:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recipient</strong></td>
<td>The recipient is the person who the item will be addressed to. <strong>Only Principal Investigators or DLPs are allowed to be the recipient.</strong> 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.</td>
</tr>
<tr>
<td><strong>Deliver To</strong></td>
<td>The delivery location is predetermined based on your Site, regardless of the room you pick. To find your ERM delivery point, please visit the <a href="#">ERM website</a>.</td>
</tr>
<tr>
<td><strong>Cost Center</strong></td>
<td>The Cost Centres displayed are those assigned to the Recipient. If a recipient’s codes are missing, please complete a “request change” form from the <a href="#">ERM website</a>.</td>
</tr>
<tr>
<td><strong>UniServices</strong></td>
<td>• When a UniServices cost centre code is selected (“UniServices Project”) it is also necessary to supply the UniServices account number (see <strong>RH_UniServices_Account_Number below</strong>).</td>
</tr>
<tr>
<td><strong>MPI Restricted</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>RH_PRODUCT CODE</strong></td>
<td><strong>Optional:</strong> Enter the PeopleSoft Financials product code this order will be charged to. E.g. A76x or 760.</td>
</tr>
<tr>
<td><strong>RH_UniServices_Account_Number</strong></td>
<td>This field must be populated when “UniServices Project” cost centre code has been selected and must be in the appropriate format ie 99999.999 (5 digits, full stop, 3 digits)</td>
</tr>
<tr>
<td><strong>RH_ACCOUNT CODE</strong></td>
<td><strong>Optional:</strong> Select the PeopleSoft Financials product code this order will be charged to.</td>
</tr>
<tr>
<td><strong>SHOPPING CART ICONS:</strong></td>
<td><strong>IMPORTANT:</strong> When using a PReSS account, you must select the RH_ACCOUNT_CODE of 312775.</td>
</tr>
</tbody>
</table>

### Shopping Cart Icons:

- Displays the chemical structure associated to the material.
- ![Warning](image) Click to see what action is required to submit your cart. Click the Fix button to take action.
- ![Warning](image) View warnings and Codes of Practice associated to the material.
- ![Heart](image) Click to add the item to your favourites.
- ![Heart](image) View similar items that already exist in the inventory.
- ![Heart](image) Click to check status of DLP approval. If status shows “Pending ERM Approval”, you need to ask a DLP to approve the item. If you are a DLP, your carts will not require DLP approval.