SciQuest ERM 8.1.1

DLP Master Manual
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1 Introduction

Welcome to the SciQuest Enterprise Reagent Manager (ERM). This is a cradle to grave purchasing and inventory system for materials including hazardous chemicals and risk biological materials. The SciQuest ERM system tracks and manages the full life cycle of material from point of purchase, transport, storage, use and disposal of hazardous and restricted materials.

SciQuest ERM also allows you to share materials that are surplus to requirements.

1.1 The purpose of this document

There are three types of system roles in SciQuest ERM
- Researcher
- Designated Laboratory Person (DLP)
- Hazard Approver

This manual is for the DLP. For further information we suggest you contact your Subject Matter Expert (SME) to seek further clarification. You can find who your SME is by accessing SciQuest ERM website: https://www.staff.auckland.ac.nz/en/human-resources/health-safety-and-wellbeing/health-and-safety-risk-management/chemical-safety/sciquest.html

If you have been assigned a DLP role the permissions you have in SciQuest ERM allows you to:

- Search for materials
- Create and save a requisition in the form of a shopping cart
- Review Shopping Carts prior to submission to the Shared Transaction Centre (STC)
- Receive orders purchased through SciQuest ERM
- Create materials and containers
- Transfer containers
- Dispose of containers
- Handle chemicals that need to be sent to the dangerous goods store for disposal

Other roles in SciQuest ERM are the Researcher who sends to you (the DLP) their Shopping Cart for approval and the Hazard Approver who approves any Shopping Cart with hazardous or restricted materials.
1.2 Training

Training is divided into topics and you should view the topics in the order they are numbered.

1. Overview of Tabs and their uses
2. Setting up your Preferences
3. Searching for Materials
4. Creating and reviewing a Shopping Cart
5. Receiving and receipting processes
6. Working with Materials
7. Working with Containers
8. Disposing processes
9. Handling of chemicals that need to be sent to the dangerous goods stored for disposal
### 1.3 Overview of Tabs and their uses

**Clicking** on the top-level tabs in the browser window gives you access to functions of the system. Tabs are hidden or displayed depending on your user permissions.

The following Tabs focus on the permissions of a DLP.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Structure Search Tab</strong></td>
<td>You can search for structures by various identifiers. The search provides results in the form of individual structure renderings that can be manipulated according to your needs.</td>
</tr>
<tr>
<td><strong>Favourites Tab</strong></td>
<td>You can create and maintain a list of favourite materials from Hosted Catalogues and Stockrooms. Materials from this list of favourites can be added directly to the Shopping Cart tab from the Favourites tab.</td>
</tr>
<tr>
<td><strong>Search Tab</strong></td>
<td>You can search in a number of ways for chemical or non-chemical materials or containers via Hosted Catalogues, Inventory, Storage Area, Stock Rooms, e-Molecules sources.</td>
</tr>
<tr>
<td><strong>Shopping Cart Tab</strong></td>
<td>Displays the requested materials from your Search. You can save requisitions and container requests.</td>
</tr>
<tr>
<td><strong>Requisition Search</strong></td>
<td>You can search for previously submitted or saved requisitions based on search criteria. Also allows you to select a complete requisition for reuse. This function is not available to the Researcher.</td>
</tr>
<tr>
<td><strong>Orders Tab</strong></td>
<td>You can search for and view historical Shopping Carts and also select to be ordered again using the same information.</td>
</tr>
<tr>
<td><strong>Receiving Tab</strong></td>
<td>Allows you to receive containers, assign and/or print Barcodes.</td>
</tr>
<tr>
<td><strong>Materials Tab</strong></td>
<td>You can search for and view ERM materials by various criteria. All researchers and DLPs have the ability to create containers and create materials.</td>
</tr>
</tbody>
</table>
1.4 Setting up your Preferences

Click File and Choose Preferences. Then you must Set Up or check the following:

1.4.1 User Tab

![User Tab image]

1. Check that the “Receive Standard Email” has been checked.

2. Check that your Preferred Delivery Location is correct. If your location is not on the list, Click the Edit button and find your location in the left hand panel, Click >> and then Click the OK button. You can now select the location from the Preferred Delivery Location list.

3. Check your Default Cost centre is correct, if applicable. If you are the owner of grants you may also check that you have access to all the cost centres you require by looking through the drop-down list of Cost Centres. If any are missing, please email sciquest@auckland.ac.nz.

1.4.2 Container Tab

![Container Tab image]

1. If pre-printed Barcode labels are being used then Select the “Use pre-printed bar codes” box.

2. Uncheck the box if Barcode labels are to be generated by SciQuest ERM.
1.4.3 Structure Search Tab

Select the drawing tool to be used.

![Preferences window showing options for Structure Drawing Tool Preferences]

- Embedded Structure Drawing Tool
- External Structure Drawing Tool
- My Drawer

My Drawer Location
2 Searching

A key benefit of SciQuest ERM is that it allows you to search for materials in sources **Internal and External** to the University.

- **Internal sources** are laboratories, Storage Areas and Stock Room on your site or that you are assigned to.
- **External sources** are Hosted Catalogues of our major suppliers and e-Molecules which is a gateway to smaller chemical companies catalogues.

1. Searches are carried out under the “Search” tab.

   - The Sources pane is where the source(s) can be selected (1)
   - The main search criteria pane is where you can input main criteria (2)
   - The Inventory icon is where you can carry out an advanced search with barcode and location (3)
   - The Hosted Catalogue tab is where you can carry out an advanced search in Hosted catalogues by including and/or excluding certain phrases/terms/keywords (4)
The structure quick search pane is where you can search by structure (5).

The result pane is where the results of your search will appear. It is divided into 5 sub-tabs (6).

Sub-tabs: Inventory, Storage Area, Stock Rooms, Hosted Catalogues, e-Molecules corresponding to the internal and external sources.

2. **Select a Source** for the search i.e. Internal Sources - Inventory, Storage Areas, Stock Rooms, and External Sources - Hosted Catalogues and e-Molecules.

<table>
<thead>
<tr>
<th>Sources</th>
<th>All</th>
<th>None</th>
<th>Pref.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Storage Area</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stock Rooms</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hosted Catalogs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>eMolecules</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Inventory searches**
  Searches all materials stored in the laboratories on your site or those that you are assigned to.

- **Storage Area searches**
  Specific areas used for storage of chemicals, where no wet lab activity is carried out are searched.

- **Stock Rooms searches**
  On-site stores that sell commonly used consumables and/or chemicals are searched.
  **Note:** Use the All or Preferred radio buttons for searching Inventory, Storage Areas and Stock Rooms.

- **Hosted Catalogue searches**
  Products from our major suppliers are searched. You have the ability to compare prices between suppliers.
  **Note:** Use the All radio button for searching Hosted Catalogues. Refer to Ordering processes in this manual to help you place orders from Non-Hosted catalogues for materials not found.

- **e-Molecule searches**
  A gateway company for smaller chemical suppliers is searched.
  **Note:** Use the All radio buttons for e-Molecule searches.

3. Enter the CAS number if available. Alternatively you may search by name using wildcards (*), or by other criteria such as molecular weight range or MDL number. Press the search button.
2.1 Basic Searches

When performing a search by name, consider the criteria you are using. Entering specific criteria or combining criteria from different fields will return fewer results than using broader terms.

<table>
<thead>
<tr>
<th>Search field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Chemical name, description or alias. Text can be entered or pasted from another application.</td>
</tr>
<tr>
<td></td>
<td><strong>Searching Hosted Catalogues:</strong></td>
</tr>
<tr>
<td></td>
<td>No wildcards are used for searching Hosted Catalogues. Search by product name, such as <strong>potassium chloride</strong> or <strong>gloves</strong>. This searches for the words in the order listed, so <strong>latex gloves</strong> gives different results to <strong>gloves latex</strong>.</td>
</tr>
<tr>
<td></td>
<td><strong>Searching Inventory and Storage Areas (your inventories):</strong></td>
</tr>
<tr>
<td></td>
<td>Wildcards (<em>) can be used. Searching by name must exactly match the name in SciQuest ERM, therefore may not always give you a result without wildcards; consider the text you are using as naming conventions may differ. Try different aliases or use wildcards (</em>) to search for partial text strings:</td>
</tr>
<tr>
<td></td>
<td>E.g. to search for Potassium chloride:</td>
</tr>
<tr>
<td></td>
<td>*<em>Potas</em> will return all materials that begin with “Potas”**.</td>
</tr>
<tr>
<td></td>
<td>*<strong>chloride</strong> will return all materials that end with “chloride”.</td>
</tr>
<tr>
<td></td>
<td><strong>Potas*chlor</strong> will return all materials that contain the text “Potas” followed by “chlor” with anything in-between, and anything at the start or end.</td>
</tr>
<tr>
<td>CAS #</td>
<td>A CAS number search is best for finding chemicals. Searching by the CAS # generates a search of all materials in Inventory, Storage Areas, Hosted Catalogues and e-Molecules. Numbers can be entered or pasted from another application. If pasting from another application be careful there is no space at the end.</td>
</tr>
<tr>
<td>Catalogue #</td>
<td>Search using the Vendor’s catalogue or manufacturer part number. The number can be entered or pasted from another application.</td>
</tr>
<tr>
<td>Customer identifier</td>
<td>Search using either a customer compound number, MDL number or a SciQuest chemical number. Select the type prior to entering number.</td>
</tr>
</tbody>
</table>
Mol Wgt Range | Search using a Molecular weight range. If a low value is entered, the search is a greater-than-or-equal-to search. If a high value is entered, the search is a less-than-or-equal-to search
---|---
Keywords | Searching by grade, size or the type of chemical you are looking for is helpful in limiting the result set

2.2 Advanced searches
When performing advanced searches, additional criteria can be entered to specify and narrow down your search.

2.2.1 Inventory Tab
You can search by Barcode or Barcode List using the Inventory function button. Click the Inventory function button to bring up these fields.

<table>
<thead>
<tr>
<th>Search Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar Code</td>
<td>By searching for a container using the Barcode your search is limited to the internal Inventory source. Text can be entered or pasted from another application.</td>
</tr>
<tr>
<td>Bar Code List</td>
<td>You can search for a container using Barcodes from an imported or pasted list e.g. from Excel</td>
</tr>
<tr>
<td>Location</td>
<td>Searching by using a location room narrows your search. You use the Inventory function button. Click the Inventory function button to bring up the dialogue window.</td>
</tr>
</tbody>
</table>
Click Location and select one of the options e.g. Location Selection, Default Room or Clear Location

To select Location to search expand the location buttons until you get to appropriate the storage area you wish to search. In the example we are searching -80 freezer 80-05. Select/highlight the freezer name and click OK.

You can drill down to the shelf, box or grid #. Your selected sublocation will then appear to the right of the Location button.

Select Inventory and/or Storage area for your source.

Click the search button and your results should appear in the result pane.

Click on the sublocation title to rearrange the items in descending order.

<table>
<thead>
<tr>
<th>Sublocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>B30 80-06 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid A01</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid A02</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid A04</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid A05</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid A06</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid A07</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid A00</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid B01</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid B02</td>
</tr>
<tr>
<td>B30 80-05 (Farm A) -&gt; Shelf 1_Frack A -&gt; Box-17 -&gt; Grid B04</td>
</tr>
</tbody>
</table>

2.2.2 Advanced Inventory Tab – Searching by Owner

You can find all items owned by a PI by using the Advanced Inventory tab. Click the Advanced Inventory tab which will bring up the owner search option as well as other fields to search by.
<table>
<thead>
<tr>
<th>Search Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Status is not a standalone search and must be combined with at least one other search option. Status examples include: all, available, in transit, not disposed, disposed, and disposed empty.</td>
</tr>
<tr>
<td>Owner</td>
<td>Choose the container owner from the list of users by selecting the Owner menu button.</td>
</tr>
<tr>
<td>Organization</td>
<td>Choose the Organisation that owns a container from the list by selecting the Organization menu button.</td>
</tr>
<tr>
<td>Date type</td>
<td>Search for containers based on a particular event; Created, disposed, expiration, room acquired (location) or site acquired (Faculty).</td>
</tr>
<tr>
<td>Date range</td>
<td>Based on the date type, you can search within a date range e.g. containers which have expired between 01.08.2015 and 31.08.2015</td>
</tr>
<tr>
<td>Allocation</td>
<td>Search for containers based on projects from the list by selecting the Allocation menu button and opening Find an Allocation dialogue box</td>
</tr>
</tbody>
</table>

2.2.3 Biological searches

When searching for biologicals you can narrow your search using the Container Flex Field function.

Click the Container Flex Fields function and search using any of the following fields:
<table>
<thead>
<tr>
<th>Search Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MPI.Restricted</td>
<td>MPI restriction status marked either true or false</td>
</tr>
<tr>
<td>BACC#</td>
<td>Biosecurity Authority/Clearance Certificate (BACC) number</td>
</tr>
<tr>
<td>Document Repository ID#</td>
<td>Document repository identification number</td>
</tr>
<tr>
<td>Donor Species DNA</td>
<td>Genetically modified organism (GMO), the insert donor species</td>
</tr>
<tr>
<td>Host Organism- Species</td>
<td>Species of the host organism</td>
</tr>
<tr>
<td>Host Organism- Subspecies</td>
<td>Subspecies of the host organism</td>
</tr>
<tr>
<td>HSNO Approval #</td>
<td>HSNO approval number</td>
</tr>
<tr>
<td>Import Permit #</td>
<td>MPI Import permit number</td>
</tr>
<tr>
<td>Insert DNA</td>
<td>GMO, description of insert</td>
</tr>
<tr>
<td>Transfer Permit #</td>
<td>MPI transfer permit</td>
</tr>
<tr>
<td>Vector</td>
<td>GMO, description of vector</td>
</tr>
</tbody>
</table>

### 2.2.4 Hosted Catalogue searches

When using the Hosted Catalogue icon you can narrow your search within the Hosted Catalogues. **Clicking** the Hosted Catalogue icon brings up the following fields.

Select one or more of the following fields to narrow your search:

<table>
<thead>
<tr>
<th>Search Field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must include</td>
<td>Only materials which include all words entered in this field are returned in search results.</td>
</tr>
<tr>
<td>Exact Phrase</td>
<td>Only materials which include all words entered in this field, in the exact order and including spaces and punctuation are returned in search results.</td>
</tr>
<tr>
<td>Include Any Terms</td>
<td>Only materials that include any or all of the words, in any order, are returned in search results. Search by any text or value. If entering multiple values, separate each with a space.</td>
</tr>
<tr>
<td>Exclude Terms</td>
<td>Combine this search with one of the others e.g. <strong>Must include</strong> and all words entered in this field are excluded.</td>
</tr>
</tbody>
</table>

### 2.2.5 Drawing structure searches in the Search Tab

Searching by drawing a structure narrows your search. Use the SciQuest ERM Structure Drawing Programme or structures imported from external programmes such as Chemdraw.
Drawing Structures using the SciQuest ERM Drawing Programme

To draw a structure, **Click** on the icon. This will **open** the **structure drawing program** specified in your Preferences > Structure Search

Once the drawing programme is open, draw the structure to be searched.

Once your structure is complete, click the **Close** button to return to the search tab.

The structure search will be activated automatically and the results for your selected sources will show in the **Structure ID** panel.

**Click** on each Structure ID returned and find the one that matches your structure.
Press the **Search** icon when the structure is found to start your search in the selected **Source**.

- **Drawing Structures using other Drawing Programmes**
  Structures can also be drawn using external programmes such as Chemdraw and imported to SciQuest ERM using two methods.

  You can either copy from Chemdraw and paste into the structure area or import from a saved file.

  To import a file, **Click** Import. Navigate to the location of the .mol file you want to import **Select** the file and **Click** Open or copy a structure from an external application and **Click** Paste

  **Note:** If using this method files must be saved as either an MDL SD File (.sdf) or an MDL Molfile (.mol).
2.2.6 Refining your searches using the result pane

Search results will be displayed on a set of 5 sub-tabs corresponding to the internal and external sources. The number of materials available in each source appears in the sub-tabs e.g. Inventory (1).

- Refining your results
  You can further refine results by sorting or filtering columns.

- Sorting columns
  Click on any column heading. The upward arrow will sort ascending. By clicking on the column heading again, the arrow will change to a downward arrow indicating the sort is descending. Clicking the column heading once again will remove the sort.

- Sort using multiple criteria
  To sort by multiple criteria, press and hold the Control key while you click the criteria in the order they are to be sorted. The number next to each of the selected columns indicates the sort order.

- Filtering
  Filters can be applied before or after your search and can filter against one, several or all of your source tabs.
  
  Click the Filter button to open the Filter search results dialogue.
Click the **Filter Name** drop-down and **select** a column heading to be filtered.

Click the **Operator** drop-down and select appropriate operator (e.g. =, <, >) for your filtering criteria and **Enter** an alphanumeric value under **Value**

Click the **Add Line** button to create additional filter(s) if required

Select the check box(s) next to the source(s) to be filtered.

Click the **Set Filter** button. You will automatically be returned to the main Search window. The Filter button and the source tabs selected for filtering will have a filter indicator indicating that a filter is applied

To remove the filter, click the filter button and press the remove filter button.
2.2.7 Drawing structure search of your inventory using Structure Search Tab

The Structure Search tab can be used to search your own inventory.

1) Start by choosing your **Preferred Sources** on the **Search Tab**. Choose the areas you wish to search in the Available Sources window and click the arrows to put them into the Preferred Sources window:

2) Go to the Structure Search tab. To draw a structure, **Click** on the icon. This will open the **structure drawing program** specified in your Preferences > Structure Search

   Once the drawing programme is open, draw the structure to be searched.
Once your structure is complete, click the **Close** button to return to the search tab. Tick the box marked Inventory and all available Databases. (This searches databases for all available structures; not for catalogue items). You may choose to search by exact structure, similarity, or substructure. Then click the Search icon.

The structures returned are those of containers in the inventory that you are able to view. You can change the number of results per page in the bottom right corner. Select any structures you want to see containers of, then click **Return Selected**.
The Search Tab will open. Select the radio buttons under Pref. for Inventory and Storage Areas to search for items in your preferred sources. Click the Search icon.

2.2.8 List Controlled rooms
A List controlled room is confined to a list of specific users who are able to view the room and operations. Only users assigned to a list-controlled room are able to view and manage the containers in those rooms.

If a List controlled room is required contact the SciQuest Advisor.

Searching

- If a user is assigned to a list controlled room, standard search procedures can be used to find the items.
- When searching, containers in a list controlled room will not be visible to users who are not assigned to the room.
- When searching by location, list controlled rooms will not be displayed unless the user is assigned to those rooms.
3  Shopping Cart processes

There are different Shopping processes when requesting items. A process exists for

- Hosted Catalogues and e-Molecules
- Non-Hosted Catalogues
- Stock Rooms

3.1  Hosted Catalogue and e-Molecule processes

DLPs who shop through the Hosted Catalogues or e-Molecules use the following steps to create a request.

- Search for required item in the Search tab
- Add item to the Shopping Cart
- Complete and Save the Shopping Cart
- Review shopping cart and process through the SSC portal or email purchasing@uniservices.co.nz for Uniservices orders
- Order Arrives

3.1.1  Searching for Items

Once you have found the items(s) in the Search Tab you then create a requisition in the form of a Shopping Cart.
3.1.2 Adding Materials to the Shopping Cart

Add the material to the Shopping Cart **Click** on the + icon next to the material. A consolidated message appears showing the following information:

![Image of material information]

**Clicking** the more link opens a .pdf report with detailed information regarding that specific section.

**Clicking** the Print button opens a .pdf page containing the complete report of all sections.

**Click** the OK button to complete the addition of the material to the shopping cart and repeat to add all the required materials into a single Shopping Cart.

**Note:** All materials in the Shopping Cart need to be from a single supplier. You need to create separate Shopping Carts for materials from each different supplier.

**Quick Tip:** If the material is a frequent order, click the yellow star to add this to the Favourites Tab.
3.1.3 Completing the Shopping Cart

To complete the Shopping Cart, Click the Shopping Cart Tab.

The Shopping Cart tab has three components:

1. The source sub-tabs
2. Requisition header
3. Requisition line items

Information will need to be filled out in the requisition header and requisition line items to complete the shopping cart order.

3.1.3.1 Requisition Header

The requisition header contains information about the requester, recipient, payment/allocation/reservation options and configurable “supplemental information”. Required fields are indicated with an asterisk (*).

Information from the requisition header will apply to all the items in the same shopping cart unless it is changed at line item level.

You can only select one Cost Centre per cart.
<table>
<thead>
<tr>
<th>Panel</th>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipient</td>
<td>*Name</td>
<td>Displays the name of the recipient of the requested items. Defaults to the name of the current user. Clicking the button opens the <em>Select a Recipient</em> dialogue box; enter the recipient’s last name, click the search button; make the selection and press OK. DLPs may be the recipient of orders placed in SciQuest ERM, but 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.</td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>The delivery location for the request. The default location of the recipient will be displayed once the recipient is selected. If required, the location can be changed by selecting from the dropdown menu. If your desired delivery address does not show please email <a href="mailto:SciQuest@auckland.ac.nz">SciQuest@auckland.ac.nz</a>.</td>
</tr>
<tr>
<td>Phone #</td>
<td></td>
<td>Displays the recipient’s telephone number. <em>This field is not editable.</em></td>
</tr>
<tr>
<td>Select Cost</td>
<td></td>
<td>The cost centre the order will be billed to. The drop-down list is populated with the recipient’s cost centres.</td>
</tr>
<tr>
<td>Center</td>
<td></td>
<td><strong>University of Auckland</strong>: The Cost Centre code is required for PeopleSoft Financials accounting purposes.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>UniServices</strong>: Three cost centre codes specific to UniServices are available.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When a UniServices cost centre code is selected, it is also necessary to supply the UniServices account number. <em>(see Supplemental Information section)</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can only select one Cost Centre per cart.</td>
</tr>
<tr>
<td>Panel</td>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Requestor/Dates</td>
<td>Requestor</td>
<td>Displays the name of the user creating the request. This field is not editable.</td>
</tr>
<tr>
<td></td>
<td>Phone #</td>
<td>Displays the phone number of the user creating the request. This field is not editable.</td>
</tr>
<tr>
<td></td>
<td>Requisition #</td>
<td>Displays the ERM requisition number, once the request has been submitted. This field is not editable.</td>
</tr>
<tr>
<td></td>
<td>Date Submitted</td>
<td>Displays the date when the request was submitted. This field is not editable.</td>
</tr>
<tr>
<td></td>
<td>Date Required</td>
<td>This field should not be changed as it has no effect on order processing times.</td>
</tr>
<tr>
<td>Supplemented Information</td>
<td>MPI Restricted</td>
<td>Indicate whether the requested item is MPI restricted. This field defaults to true. If the material is not MPI restricted Click the button and select false.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If items in the same shopping cart have different MPI Restricted status, they need to be modified individually at the requisition line items level.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If all items have the same MPI Restricted status, they do not need to be modified individually at the requisition line items level.</td>
</tr>
<tr>
<td></td>
<td>RH_ACCOUNT_CODE</td>
<td>Displays the PeopleSoft Financials account code this University of Auckland order will be charged to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775020  Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775040  Consumables - Lab/Workshop</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775070  Consumables - Health and Safety</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775095  Consumables – haz chems/restricted biols/radionuclides/vet meds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the required code is not in the dropdown list, please leave this field blank and let the STC know what the code should be when you submit your order through the STC portal.</td>
</tr>
<tr>
<td>Panel</td>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Supplemental Information</td>
<td>RH_PRODUCT CODE*</td>
<td>Displays the PeopleSoft Financials product code (optional) this University of Auckland order will be charged to.</td>
</tr>
<tr>
<td>(cont)</td>
<td>RH_UniServices_Account_Number*</td>
<td>Displays the Technology One account number this UniServices order will be charged to.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>This field must be populated when a UniServices cost centre code has been selected and must be in the appropriate format:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Cost Centre</strong></td>
<td><strong>Format of RH_UniServices_Account_Number</strong></td>
</tr>
<tr>
<td></td>
<td>UniServices GL Account</td>
<td>99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.</td>
</tr>
<tr>
<td></td>
<td>(Only used by UniServices Operating Centres)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UniServices HOD Account</td>
<td>99999 (a five digit code)</td>
</tr>
<tr>
<td></td>
<td>UniServices Project</td>
<td>999999.999 (a five digit code with a 3 digit suffix)</td>
</tr>
</tbody>
</table>
3.1.3.2 Requisition Line Items

The requisition line items displayed the individual items being requested.

<table>
<thead>
<tr>
<th>Button / Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark Item as Favorite</td>
<td>Marks the selected item as a ‘Favorite’.</td>
</tr>
<tr>
<td>Edit Item</td>
<td>Opens the Line Item dialog for the selected item</td>
</tr>
<tr>
<td>Delete Item</td>
<td>Removes the selected item from the order set</td>
</tr>
<tr>
<td>Ordered</td>
<td>Editable field that contains the quantity of the item to be requested.</td>
</tr>
<tr>
<td></td>
<td>The default Ordered Quantity is ‘1’.</td>
</tr>
</tbody>
</table>

Open the Line item dialog by clicking on the icon to check and edit requested item(s). Most of the line item information will be automatically populated from the Hosted Catalogue, but sometimes the Package Amount and Package Unit are missing and you will need to input this manually.

Required fields are indicated with an asterisk (*).

Please note that the cost centre selected in the Requisition header will apply to all line items, regardless of any cost centres selected at the line item level.
### 3.1.3.3 Special Requirements for Restricted or Hazardous materials

It is compulsory to declare the item’s hazardous and restricted status if the requested item is one of the below.

- MPI Restricted
- Controlled drugs
- Radioactive
- Toxic gas (UN 2.3)
- Highly reactive (UN 4.1 PG1, UN 4.2 PG1, UN 4.3 PG1)
- Highly toxic (UN6.1 PG1)

Click the pencil to open the line for editing.

Click the `next to the appropriate list and change the status to true.

Press Save to return to the Shopping Cart tab.
3.1.4 Saving the Shopping Cart

Once all the information is checked and correct, the Shopping Cart can be saved.

- **Saving the Shopping Cart**

  **Click** the **Save As** button.

  The dialogue window **Enter a Save Name or Select Existing Saved Requisitions to Overwrite** appears and prompt you to save and name your requisition.

  **Note:** Name the Shopping Cart in the following format: **Requestor name_date_a number** (this distinguishes the Shopping Carts placed by the same Researcher on the same date)

  Click **OK** and a dialogue window confirming your Shopping Cart has been successfully saved appears.

  Click **OK** to continue.

  **The next step is to Review the cart, which is detailed in Section 3.3**
3.2 Non-Hosted Catalogue processes
You can still purchase a material when it is not found in Hosted catalogues through Non-Hosted Catalogue suppliers. You may also use this process to order from Hosted catalogue suppliers if the item you require is not shown in the catalogue. In cases where the Supplier is not found in the Non-Hosted catalogue then a formal process to establish the Supplier must be undertaken with the STC.

DLPs who shop through the Non-Hosted catalogue use the following steps to create a Shopping Cart.

- **Add** item to the Shopping Cart
- **Complete** and **Save** the Shopping Cart
- **Review** shopping cart and process through the SSC portal or email purchasing@uniservices.co.nz for Uniservices orders

**Note**: Non-Hosted Catalogue items cannot be added to the Favourites tab. However if you place the same order often, you can find your previous requisition in the Requisition Search tab and click the plus sign to “Copy As New” which will duplicate the order.

3.2.1 Non-Hosted Catalog Items Tab
Go to the **Shopping Cart** tab and **Select** the **Non-Catalog items** sub-tab (2). Complete the required fields in the Requisition Header.

The requisition header contains information about the requester, recipient, payment/allocation/reservation options and configurable “supplemental information”. Required fields are indicated with an asterisk (*).

**Information from the requisition header will apply to all the items in the same shopping cart unless it is changed at line item level.**

**You can only select one Cost Centre per cart.**
<table>
<thead>
<tr>
<th>Panel</th>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipient</td>
<td>*Name</td>
<td>Displays the name of the recipient of the requested items. Defaults to the name of the current user. Clicking the button opens the Select a Recipient dialogue box; enter the recipient’s last name, click the search button; make the selection and press OK. DLPs may be the recipient of orders placed in SciQuest ERM, but 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.</td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td>The delivery location for the request. The default location of the recipient will be displayed once the recipient is selected. If required, the location can be changed by selecting from the dropdown menu. If your desired delivery address does not show please email <a href="mailto:SciQuest@auckland.ac.nz">SciQuest@auckland.ac.nz</a>.</td>
</tr>
<tr>
<td>Phone #</td>
<td></td>
<td>Displays the recipient’s telephone number. <em>This field is not editable.</em></td>
</tr>
<tr>
<td>Select Cost</td>
<td>Center</td>
<td>The cost centre the order will be billed to. The drop-down list is populated with the recipient’s cost centres. <strong>University of Auckland:</strong> The Cost Centre code is required for PeopleSoft Financials accounting purposes. <strong>UniServices:</strong> Three cost centre codes specific to UniServices are available. When a UniServices cost centre code is selected, it is also necessary to supply the UniServices account number. <em>(see Supplemental Information section)</em></td>
</tr>
<tr>
<td>Panel</td>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Requestor/Dates</td>
<td>Requestor</td>
<td>Displays the name of the user creating the request.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>This field is not editable.</em></td>
</tr>
<tr>
<td></td>
<td>Phone #</td>
<td>Displays the phone number of the user creating the request.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>This field is not editable.</em></td>
</tr>
<tr>
<td></td>
<td>Requisition #</td>
<td>Displays the ERM requisition number, once the request has been submitted.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>This field is not editable.</em></td>
</tr>
<tr>
<td></td>
<td>Date Submitted</td>
<td>Displays the date when the request was submitted.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>This field is not editable.</em></td>
</tr>
<tr>
<td></td>
<td>Date Required</td>
<td>This field should not be changed as it has no effect on order processing times.</td>
</tr>
<tr>
<td>Supplemental Information</td>
<td>MPI Restricted</td>
<td>Indicate whether the requested item is MPI restricted.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This field defaults to <strong>true</strong>. If the material is <strong>not</strong> MPI restricted <strong>Click</strong> the <strong>false</strong> button and select <strong>false</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If items in the same shopping cart have different MPI Restricted status, they need to be modified individually at the requisition line items level.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If all items have the same MPI Restricted status, they do not need to be modified individually at the requisition line items level.</td>
</tr>
<tr>
<td></td>
<td>RH_ACCOUNT_CODE*</td>
<td>Displays the PeopleSoft Financials account code this University of Auckland order will be charged to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775020 Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775040 Consumables - Lab/Workshop</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775070 Consumables - Health and Safety</td>
</tr>
<tr>
<td></td>
<td></td>
<td>775095 Consumables – haz chems/restricted biols/radionuclides/vet meds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If the required code is not in the dropdown list, please leave this field blank and let the STC know what the code should be when you submit your order through the STC portal.</td>
</tr>
<tr>
<td>Panel</td>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Supplemental Information (cont)</td>
<td>RH_PRODUCT_CODE *</td>
<td>Displays the PeopleSoft Financials product code (optional) this University of Auckland order will be charged to.</td>
</tr>
<tr>
<td></td>
<td>RH_UniServices_Accout_Number*</td>
<td>Displays the Technology One account number this UniServices order will be charged to.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>This field must be populated when a UniServices cost centre code has been selected and must be in the appropriate format:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>**</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UniServices GL Account</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Only used by UniServices Operating Centres)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UniServices HOD Account</td>
</tr>
<tr>
<td></td>
<td></td>
<td>UniServices Project</td>
</tr>
</tbody>
</table>

### 3.2.2 Adding Items to the Shopping Cart

To add materials to the Shopping Cart press the **Add Item** and a line item dialogue window appears. Complete the required fields. Press **Save** to return to the **Shopping Cart** tab.

Please note that the cost centre selected in the Requisition header will apply to all line items, regardless of any cost centres selected at the line item level.
<table>
<thead>
<tr>
<th>Button / Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Qty (*)</td>
<td>The desired quantity of the item</td>
</tr>
<tr>
<td>Supplier (*)</td>
<td>The field displays the supplier from whom the item will be purchased. Clicking the <strong>Supplier</strong> menu button opens the <strong>Select a Vendor</strong> dialogue to enable you to select a supplier for the item. <strong>Non-catalogue items can only be purchased from suppliers loaded in SciQuest ERM and PeopleSoft Financials. When the supplier is not found in SciQuest ERM please contact <a href="mailto:SciQuest@auckland.ac.nz">SciQuest@auckland.ac.nz</a>.</strong></td>
</tr>
<tr>
<td>Catalog # (*)</td>
<td>The supplier’s catalogue number for the item</td>
</tr>
<tr>
<td>Button / Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Pkg Amt (*)</td>
<td>The quantity amount for a container of the item.</td>
</tr>
<tr>
<td>Pkg Units (*)</td>
<td>The unit of measure for a container of the item. Clicking the Pkg Units menu button opens the Select a Unit dialogue to allow you to select the correct package amount unit for the item.</td>
</tr>
<tr>
<td>Lot Size (*)</td>
<td>The Lot size of the item; if not otherwise specified, the value defaults to ‘1’. (The number of containers/items within one package/box of the item) If lot size = 1 then = EA (Each); If lot size &gt; 1 then = CS (case)</td>
</tr>
<tr>
<td>Storage Code</td>
<td>The text description of the storage code for containers of this item. Clicking the Storage Code menu button opens the Storage Code dialogue to select the value.</td>
</tr>
<tr>
<td>CAS #</td>
<td>The CAS number of the item. This must be included for all chemicals.</td>
</tr>
<tr>
<td>MDL #</td>
<td>Unique identification number for each chemical reaction and variation</td>
</tr>
<tr>
<td>Description (*)</td>
<td>The Common Name of the item. This value is typically also used for the container label when the item is received.</td>
</tr>
<tr>
<td>Price (*)</td>
<td>The price of the item; accepts 2 decimal places</td>
</tr>
<tr>
<td>Currency (*)</td>
<td>Currency used</td>
</tr>
<tr>
<td>Cost Center</td>
<td>Please note that the cost centre selected in the Requisition header will apply to all line items, regardless of any cost centres selected at the line item level.</td>
</tr>
<tr>
<td>Date Required</td>
<td>This field should not be changed as it has no effect on order processing times.</td>
</tr>
<tr>
<td>Recipient Location</td>
<td>The location the ordered item should be delivered to. Clicking the Recipient Location menu button opens the Select a Location dialogue to allow you to select a recipient location not already displayed in the drop-down list.</td>
</tr>
</tbody>
</table>

*The drop-down list is populated with the recipient’s Preferred Delivery Location entries (from the Preferences > User Preferences dialogue). Use the Select a Location dialogue’s navigation tree to select a location or sublocation not included in the drop-down list.*
<table>
<thead>
<tr>
<th>Button / Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item flex fields</td>
<td>It is compulsory to declare the item’s hazardous and restricted status if the requested item is:</td>
</tr>
<tr>
<td>(panel)</td>
<td>• MPI Restricted</td>
</tr>
<tr>
<td></td>
<td>• Controlled drugs</td>
</tr>
<tr>
<td></td>
<td>• Radioactive</td>
</tr>
<tr>
<td></td>
<td>• Toxic gas (UN 2.3)</td>
</tr>
<tr>
<td></td>
<td>• Highly reactive (UN 4.1 PG1, UN 4.2 PG1, UN 4.3 PG1)</td>
</tr>
<tr>
<td></td>
<td>• Highly toxic (UN6.1 PG1)</td>
</tr>
<tr>
<td>A.1.Account_Code</td>
<td>If the requested item is one of the above, click the button next to the appropriate list and change the status to true.</td>
</tr>
<tr>
<td>A.2.Product_Code</td>
<td>Please note that the Account code and Product code selected in the Requisition header will apply to all line items, regardless of any codes selected at the line item level.</td>
</tr>
<tr>
<td>A.3.PC_Business_Unit</td>
<td></td>
</tr>
<tr>
<td>A.4.Additional_Note</td>
<td></td>
</tr>
<tr>
<td>B.1.MPI_Restricted</td>
<td></td>
</tr>
<tr>
<td>B.2.Controlled_Drugs</td>
<td></td>
</tr>
<tr>
<td>B.3.Radioactive_flag</td>
<td></td>
</tr>
<tr>
<td>B.4.Toxic_Gas(2.3)</td>
<td></td>
</tr>
<tr>
<td>B.5.Reactives(4)</td>
<td></td>
</tr>
<tr>
<td>B.6.Highly_Toxic(6.1 PG1)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3.2.3 Saving the Shopping Cart
Once all the information is checked and correct, the Shopping Cart can be saved.

- **Saving the Shopping Cart**

  Click the **Save As** button.

The dialogue window **Enter a Save Name or Select Existing Saved Requisitions to Overwrite** appears and prompt you to save and name your requisition.

**Note:** Name the Shopping Cart in the following format: Requestor name_date_a number (this distinguishes the Shopping Carts placed by the same Researcher on the same date)

Click **OK** and a dialogue window confirming your Shopping Cart has been successfully saved appears.

Click **OK** to continue.

**The next step is to Review the cart, which is detailed in Section 3.3**
3.3 Reviewing and Submitting Shopping Carts

3.3.1 Reviewing the Shopping Cart

After the Shopping Cart has been saved, it needs to be reviewed. You will do this for your own Shopping Carts, as well as for those sent to you by Researchers.

- Go to the Requisition Search tab
- Press the Clear button
- Click the ellipsis button next to the “Saved Requisition Name” field
- Find the saved requisition and click OK.

The saved requisition will return in the result pane, with a requisition number.

To review shopping carts sent to you by Researchers, click the button.

To review your own shopping cart, click the button. If you need to make changes to your cart, click the button.

When clicking the button, any warnings that the Researcher saw when creating the cart will pop up again.

The shopping cart will then show up under the Shopping cart tab and you will have to check the following to ensure that accurate information is provided:
Under requisition header:

- Recipient (will be the PI who is the owner of the requested item)
- Cost centre
- MPI restricted status (This field cannot be left blank! Either true or false has to be selected)
- UniServices account number (if applicable)

Under requisition line items:
• Item information
• Cost centre is determined by the Requisition Header field value, so should not be different.
• Item’s hazardous and restricted status (It is compulsory to declared the item’s hazardous and restricted status if the requested item is:
  - MPI restricted
  - Controlled drugs
  - Radioactive
  - Toxic gas (UN 2.3)
  - Highly reactive (UN 4.1 PG1, UN 4.2 PG1, UN 4.3 PG1)
  - Highly toxic (UN 6.1 PG1)

If you clicked the button to review your own cart, the requisition number remains the same. If you clicked the button to review a Researcher’s cart (or to edit your own), you need to click Save As to save the shopping cart again and it will receive a new cart number. Find this new requisition number in the Requisition Search tab:
• Go to the Requisition Search tab
• Press the Clear button
• Click the ellipsis button next to the “Saved Requisition Name” field
• Find the saved requisition and click OK.

The saved requisition will return in the result pane, with a requisition number.
3.3.2 Submitting the Shopping Cart

3.3.2.1 Submitting University order to the STC

You can use the Request Details field to record the name of the original requestor. You could also record the original requisition number here if you wish as this information doesn't come through in the email notification.

- Attach supporting documentation such as MPI import permit (where required)
- The supporting documentation should be saved to your records and placed on the shared file folder using the complete PO number as the folder name when available
- The shared file folder can be found at \uoa.auckland.ac.nz\Shared\MED\MSCI\HazTrack

3.3.2.2 Submitting TechnologyOne order to Uniservices

The actual processes for searching for items, saving shopping carts and receipting is the same as for Uniservices orders.

If ordering from Uniservices there are 3 options listed under Cost Centres. Choose the appropriate option depending on the type of account.
If one of the 3 UniServices cost centre options is selected, the researcher must also supply the actual UniServices account code to charge to in the “Supplemental Information” section using the RH_UniServices_Account_Number field (4).

This must be in the appropriate format.

<table>
<thead>
<tr>
<th>Cost Centre</th>
<th>Format of RH_UniServices_Account_Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>UniServices GL Account (Only used by UniServices Operating Centres)</td>
<td>99.9.999.9999 e.g. 10.7.125.9760 Light Metals Research Centre. (Entity/Sector/Centre/Department). The system will then supply the remainder of the code.</td>
</tr>
<tr>
<td>UniServices HOD Account</td>
<td>99999 (a five digit code)</td>
</tr>
<tr>
<td>UniServices Project</td>
<td>99999.9999 (a five digit code with a 3 digit suffix)</td>
</tr>
</tbody>
</table>

As with the University’s RH_Account Code and RH_Product Code, this can be overwritten at the line level if the user doesn’t want to charge all the lines to the same UniServices account number.

Email shopping cart # to purchasing@uniservices.co.nz

- Attach supporting documentation such as MPI import permit (where required)
- The supporting documentation should be saved to your records and placed on the shared file folder using the complete PO number as the folder name when available
- The shared file folder can be found at \\uoa.auckland.ac.nz\Shared\MED\MSCI\HazTrack

Rule: Do not mix University and Uniservices as this will make the Shopping Cart fail.

3.3.3 Keeping Track of Orders
When the order is placed through the STC portal there is a free text field where you are able to add information about the order. You could also record the original Requisition number here if you wish as this number does not come automatically through in the email notification from the STC.

Note: The Requisition number you submit to the STC for your order changes after the STC processes your order.
After you submit your Requisition to the STC you will receive a notification that you have raised a new request. This notification has a service request number and includes anything recorded in the free text field.

You have raised a new request: Shared Transaction Centre (STC) Request to Purchase SciQuest request [Service Request: 160729-002416]

Staff Service Centre <staffservice@auckland.ac.nz>

Dear Mary

Your service request is 160729-002416 and has been opened with the following information.

Order to Global Science for Rotavap (special price offered as per attached letter).

Your request will be assessed and referred to one of our support staff to clarify, update, resolve or escalate within 4 hours.

When the STC have processed your request you will receive a further notification. The notification includes the new Requisition number (this is the number generated when the STC have punched out to pull the order into PeopleSoft Financials and is not the same cart number you originally sent down) the vendor and the service request number.

(Stc) Request to Purchase SciQuest request#675_Global Science [Service Request: 160729-002416]

Shared Transaction Centre (STC) <staffservice@auckland.ac.nz>

Dear Mary

Thank you for your purchase request which has been processed. A requisition has been raised in the system is approved (as per screen shot below).

Confirmation

<table>
<thead>
<tr>
<th>Requested For</th>
<th>Murabula, Phoebe</th>
<th>Number of Lines</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Name</td>
<td>ISPellman_Sc#675_9136_Global</td>
<td>Total Amount</td>
<td>4,950.00 NZD</td>
</tr>
</tbody>
</table>

A purchase order (PO) will be generated and automatically dispatched to the supplier. You will also receive an automated email confirmation and copy of the PO.

New SciQuest ERM Requisition number is #675
You will also receive a copy of the PO by email once it is dispatched to the vendor.

When your order is received you will be sent a notification that has the new Requisition number only. Therefore it may be helpful to link these numbers for your own records in a spreadsheet like this:

<table>
<thead>
<tr>
<th>Req #</th>
<th>Date Ordered</th>
<th>Ordered for</th>
<th>Description of order</th>
<th>Service Request Number</th>
<th>New Req #</th>
<th>PO #</th>
<th>Received</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3.3.4 Order Arrives
Once the Shopping Cart has been processed by STC or Uniservices it becomes an Order. Most orders are received in the stockroom by the stockroom personnel. Some specialist items may be received in the laboratory by a DLP.

Further steps can be found under Section 4.0 Receiving and Section 5.0 Receipting. An item may be Received in the stockroom, but Receipting must be performed by the DLP who submitted the order.

3.4 Stock Room processes
All users are able to purchase through the stockroom they are allocated to and should use the following steps to create a request.

- **Search** for required item in the **Search Tab**
- **Add** item to the Shopping Cart
- **Complete** the Shopping Cart
- **Order is Ready**

3.4.1 Searching for an Item
In the Search Tab, select the Stock Room All radio button then Search for the item(s). The results will appear on the Stock Rooms tab. To see all items sold through your Stock Room, perform a Stock Rooms search with two wildcards (**) in the Name field.
3.4.2 Adding Items to the Shopping Cart

Add items to the Shopping Cart by Clicking on the icon next to the item. If there are warnings associated with the material, a message appears showing the following information:

Clicking the more link opens a .pdf report with detailed information regarding that specific section. Clicking the Print button opens a .pdf page containing the complete report of all sections.

Clicking the OK button completes the addition of the material to the Shopping Cart. Repeat to add all the required materials into a single Shopping Cart.

Quick Tip: If the material is a frequent order, click the yellow star icon to add this to the Favourites Tab.

3.4.3 Completing the Shopping Cart

Complete the Shopping Cart by clicking the Shopping Cart tab and going to the Stock Rooms tab.
Fill out the information in the requisition header. The quantity can be changed under the “Ordered” column.

**Extra codes:** If you need to specify a UniServices project code, an Account Code, or a Product Code; right click on the item in your shopping cart and click ‘View/Add notes’. Put the extra code(s) in here.

Press the **Submit** button and a dialogue window confirming that your Shopping Cart has been successfully submitted appears.

Press **OK**. A **Print Confirmation** dialogue window appears asking if you want to print the requisition.

Clicking Yes generates a “Stockroom Requisition Form” in pdf format which is a record of your request.

### 3.4.4 Order is Ready

Once the Shopping Cart has been processed it is handled by a Stock Room person. Any items with barcodes need to be receipted into their lab location with a scanner in the Stock Room.

### 4 Receiving

Items that you have ordered through SciQuest ERM will need to be **Received** into SciQuest ERM.

- When you Receive an item it is automatically receipted in PeopleSoft.
- Barcodes are applied to chemicals and restricted biologicals as they are received. Consumables generally do not require a barcode.
• Most items will be Received into SciQuest ERM by the stores technician, unless they are on dry ice or restricted goods. If items have not been received in the Stock Room, the DLP is responsible for Receiving.

To Receive items go to Receiving tab.

1. The criteria pane allows the user to enter or select search criteria.
2. The alerts/notes pane displays any health, safety or information alerts or note text associated to the selected request item.
3. The requested item summary pane displays the general information for the selected request item, including quantity requested and package size.
4. The container attributes pane displays the attributes that will be associated to all containers created for the request item, including catalogue number and supplier. Container flex fields will also be included.
5. The request items pane displays the request items that match the search criteria.

4.1 Receiving an item
Most orders are received in the stockroom by the stockroom personnel. Some specialist items may be received in the laboratory by a DLP.

Only a single item can be received at a time. Materials requested in a single Shopping Cart will have to be received one at a time.
• Search for the item by entering the PO number in the **P.O./Requisition** field. Note that for T1 orders (UniServices purchasing system), PO numbers have different versions depending on the status. When receiving a Uniservices order you should add a wild card to ensure the order version is found, for example, **AULSQ00016***.

• Items that match the search criteria will be displayed in the result pane. Highlighted row indicates that the item has one or more alerts or is associated with a note. Select the item to be received.

• Item summary and container attributes will be displayed in the requested item summary pane and the container attribute pane.
  - Verify that quantity received matches with the ordered quantity
  - Fill in known container flex fields (mainly for biologicals)

After receiving, an email will be sent to the DLP of the Recipient with details of the order. Note that the Requisition Number provided in this email is not the same as the cart number submitted to STC. To find the PO number of the order, search this new Requisition Number in the Orders Tab after selecting Status All.
4.1.1 Receiving exactly as ordered

After selecting the item to be received, the Quantity Received field will default to the quantity ordered. If it is correct, click the **Receive Item** icon.

A **Container Bar Codes** dialogue box may appear. Enter/Scan the container barcode(s) and click **OK**.

The updated status of **Received Full** will be displayed in the result pane.
After receiving, items with barcodes must be receipted into SciQuest ERM by the DLP into their final location. Please refer to Section 5.0 Receipting.

4.1.2 Receiving a partial order

After selecting the item to be received, the Quantity Received field will default to the quantity ordered.

Put the cursor in the **Quantity Received** field, input the received quantity and press the Tab key. The outstanding quantity will be automatically calculated.
Click the **Receive Item** icon.

A **Container Bar Codes** dialogue box may appear. Enter/Scan the container barcode(s) and click OK.
The updated status if **Received Partial** will be displayed in the result pane.

After receiving, an email will be sent to the DLP of the Recipient with details of the order. Note that the Requisition Number provided in this email is not the same as the cart number submitted to STC. To find the PO number of an order, search the new Requisition Number in the Requisition Search Tab.

After receiving, items with barcodes must be receipted into SciQuest ERM by the DLP into their final location. Please refer to Section 5.0 Receipting.

4.1.3 Receiving an order that comes in different packaging

In the following example, we will be receiving 4 x 50 ml of the request chemical instead of the 2 x 100 ml that was originally ordered.

After selecting the item to be received, the Quantity Received will default to the quantity ordered.
Put the cursor in the **Quantity Received** field, input the received quantity and press the Tab key. A **Confirm Quantity Received** dialogue box will appear. Click **No**.

Change the **Package amount**, change the **outstanding quantity** to 0 and click the **Receive Item** icon. A **Confirm Quantity Received** dialogue box will appear. Click **Yes**.

A **Container Bar Codes** dialogue box will appear. Enter/Scan the container barcode(s) and click OK.
The updated status of **Received Full** will be displayed in the result pane.
5 Receipting
Receipting is when the DLP transfers received barcoded items into their actual storage location.

Containers to be receipted in SciQuest will be picked up, by the DLP, from the stockroom or certain holding areas. DLPs will have to physically transfer the containers to the storage location and record this transfer in SciQuest.

The following instructions show how to Receipt manually. This can also be done using a scanner – see Section 8.1.

- Go to the Search tab. Search for the item by barcode in the inventory tab.
- Right Click the selected container in the result pane.
- Select Container Operations, then Transfer. The default location of the current user will automatically be populated.
• Change the owner of the container **to the Principal Investigator who will be the responsible owner of the container**. Press the **Owner** button, find the new owner by his/her last name, select the new owner. The new owner’s default location will be automatically populated.

• Change the location. Press the **Use** button and change the location (Sublocations can be found by pressing the ellipsis icon underneath, after the room location has been selected). The Storage location will auto update to the Use location and sublocation automatically once you click Transfer.

• Press the **Transfer** button to confirm the transfer.

• For MPI restricted items, it is compulsory to enter the following information into SciQuest:
  
  - MPI restricted status (true)
  - BACC#
  - Document repository ID#
  - Donor species DNA (insert donor species) (only for GMO)
  - Host organism – species (only for GMO)
  - Host organism – subspecies (only for GMO)
  - HSNO approval # (for GMO and competent cells)
  - Import permit number
  - Insert (only for GMO)
  - Transfer permit # (this can be obtained from the lab manager/technical team leader)
  - Vector (only for GMO)

To input the above information:

- Right click the selected container in the result pane
- Select **Container Operations**, then **Edit**
• Enter the information under the **Additional Fields** table

![Image of SciQuest ERM 8.1.1 DLP Manual](image)

6 **Working with Materials**

As a DLP you may need to search for, view and create a new material (e.g. newly created chemicals, newly created genetically modified organisms).

6.1 **Searching for Materials**

DLPs can search for materials using the **Materials Tab**

The Materials Tab has 3 information panes:

- The Text Criteria pane which allows you to enter and select common search criteria (1)
- The Search Results pane which displays materials matching search criteria (2)
- The List Associations pane which displays any regulatory lists that have been associated to the selected material (3)
Begin your search by **Clicking** the **Clear** button to re-set the search to the default criteria where ALL materials are searched for regardless of their review status and creator site.

**Enter** your text (preferably a CAS number) in the Name/Identifier field. You can narrow your search by using a common name, a MDL number, a CAS number or Custom Compound ID. A Wildcard (*) can also be used in this field, and should generally be used if searching by names.

**Click** the **Search** icon to get your results which are displayed in the Search Results pane.

Selecting any individual material populates the List Associations pane (if any lists are associated with the material).
6.2 Viewing materials

More information on your materials can be obtained by **Right Clicking** on a material and selecting the **View Material** option.

This option opens the **Material Maintenance** dialogue window where information on the materials properties is displayed. Information is organised into several tabs:

**Identifiers tab**

Here general information about the material including ingredients, structures, structure identifiers and synonyms can be found.
Physical Properties & Product information tab
You can find common physical properties for the material and catalogue information (supplier, catalogue#, brand, manufacturer part number) for containers that have been received or created.

GHS Properties
Here you can find information on the Standard GHS properties. Signal Word, hazard statements and risk/safety phrases and pictograms are displayed.
6.3 Creating a new Material

As a DLP you may want to create a new material. To create new materials go to the Material tab. Make sure the material has not already been created by searching for CAS number and/or various common names with wildcards (*) in the Name/Identifier field.

Click the New substance icon to open the Create a New Material dialogue window

Enter a material common name.
The common name is checked against existing materials, if a duplicate material exists, an error message is displayed.

The **New** substance icon needs to be clicked again and a new name entered in the **Create a New Material** dialogue window.

**Click** the **Create material** button which opens the **Material Maintenance** dialogue window. This is where you can enter information of the new material. Include the CAS number if it exists for the material. **Click** the **Save** button to save the material.
6.3.1 Creating a new genetically-modified organism (GMO) or restricted biological (RB)

When creating a new genetically-modified organism (GMO) or restricted biological (RB), create the new material as outlined in the above section (Section 6.3 Creating a new Material) AND add the following steps before saving:

Select the icon next to “Structure Identifiers. Select “Customer Compound ID” in the Type field and enter “GMO” (for genetically-modified organism) or “RB” (for restricted biological) in the Name field. Press Save. If the item is both a GMO and a RB, repeat the step so the item can have both “GMO” and “RB” as “Customer Compound ID”. Once the material is created, a container of this material should be created (please refer to Section 7.1 Creating a new container).
### Fetal Bovine Serum, USA origin, cell culture tested

<table>
<thead>
<tr>
<th>Identifiers</th>
<th>Physical Properties &amp; Product Information</th>
<th>OHS Properties</th>
<th>NITFA/HMIS Properties &amp; List</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Material Information</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Common Name</td>
<td>Fetal Bovine Serum, USA origin, cell culture tested</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formula</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Material Source</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Not Reviewed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Ingredients

<table>
<thead>
<tr>
<th>Material</th>
<th>CAS #</th>
<th>MDL #</th>
<th>Physical State</th>
<th>Percentage</th>
</tr>
</thead>
</table>

#### Structure Identifiers

**Material Structure Identifier**

- **Name**: RB
- **Type**: Customer: Compound ID

[Save]  [Cancel]
7 Working with Containers

Note: All container owners must be current Principal Investigators.

7.1 Creating a new Container

As a DLP you may want to create a Container. To do this, go to the Materials tab.

Enter the text search criteria in Name-Identifier field. It can be a common name, MDL number, CAS number or Custom Compound ID. Wildcard (*) can also be used in this field.

Click the search icon and Right Click the selected material in the result pane

Select the “Create Container” option

A Container dialogue window appears
Complete the container information. **It is compulsory to change the owner to the Principal Investigator who will be the responsible owner of the container.** Locations of containers are also required.

For MPI restricted items, it is compulsory to enter the following information into SciQuest:

- MPI restricted status (true)
- BACC#
- Document repository ID#
- Donor species DNA (insert donor species) (only for GMO)
- Host organism – species (only for GMO)
- Host organism – subspecies (only for GMO)
- HSNO approval # (for GMO and competent cells)
- Import permit number
- Insert (only for GMO)
- Transfer permit # (this can be obtained from the lab manager/technical team leader)
- Vector (only for GMO)

**Note:** For Supplier, Select “**UOA created**” if the material is a newly generated material or GMO created in the University of Auckland.
Depending on your preference settings, either SciQuest ERM automatically generates a Barcode for the new container (circled in red in the following screenshots) or you can scan/enter a pre-printed barcode (circled in blue in the following screenshots).

Click the **Save** button to save the container.

### 7.1.1 Printing labels for a container

Go to the **Search** tab. Search for the container.

**Right Click** the selected container in the result pane.

Select **Print Bar Codes**
7.2 Replicating an existing container

As a DLP you may want to replicate an existing container.

Go to the **Search** tab and Search for the container.

**Right Click** the selected container in the result pane.

Select **Container Operations** and Select **Replicate**.

A **Replicate** dialogue window appears.

Enter the number of containers to create. Check the **Copy Dates from Original Container** box if preferred.

Depending on your preference setting, SciQuest ERM either automatically generates a BarCode(s) for the new container(s) or allows you to scan/enter pre-printed Barcode(s).
7.3  **Viewing a container**

Go to the **Search** tab. Search for the container.

**Right Click** the selected container in the result pane.

Select **View Container**

7.4  **Checking container history**

Go to the **Search** tab. Search for the container.

**Right Click** the selected container in the result pane.

Select **Container History**.

The information on owner, location, quantity, status and dispense are displayed under different tabs.
7.5 Editing a container
Go to the Search tab. Search for the container.

**Right Click** the selected container in the result pane.

Select **Container Operations**, then **Edit**

Depending on your permissions, the selected container may be edited. If not, the following error message appears.

![Not Authorized dialog box]

7.6 Transferring a container
Go to the Search tab. Search for the container.

**Right Click** the selected container in the result pane.

Select **Container Operations**, then **Transfer**.

Note: The default identity and location of the current user is automatically populated. Please ensure the original owner is **NOT** changed if the container is only intended to be temporarily relocated.
• Transferring Ownership of the Container

Reminder: Only Principal Investigator can be a container owner.

You can change the Owner of the Container by Pressing the Owner button. Find the new Owner using their last name, select the new owner. The new owner’s default location is automatically populated.

Press the Transfer button to confirm the transfer.

• Changing the storage location
You can change the storage location by Pressing the Use button and changing the location, then Pressing the Storage button and changing the location.

Press the Transfer button to confirm the transfer.

The transfer of ownership and location is recorded and can be checked under Container History
7.7 Updating the quantity of material in a Container

Go to the Search tab. Search for the container of interest (as outlined in section 3).

Right Click the selected container in the result pane and Select View Container, then Update Quantity.

Enter the end amount in the End Amount field and press OK.
8 Scan Operations

8.1 Receipting items or changing location/owner with a Scanner

DLPs can carry out a Scan Transaction to “transfer/check-in” the item in SciQuest ERM instead of performing a manual Container Transfer. The same process can be used to change the location or owner of containers. The scan transaction should be performed in the pre-defined delivery points (if applicable) where the following are available:

a. Computer with SciQuest ERM running
b. Scanner
c. Barcode worksheet
d. Directory of barcodes for users, locations and/or sublocations

8.1.1 Generate a Barcode Worksheet

A Barcode Worksheet can be generated which will provide up to four user barcodes and the ERM function barcodes:

1) Select File > Bar Code Worksheet
2) Select up to four users
3) Select a location (optional)
4) Select the Scan Functions required. For receipting, select “Check In”.

ERM Bar Code Worksheet

<table>
<thead>
<tr>
<th>Function</th>
<th>User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check In</td>
<td>Boyd, Emily</td>
</tr>
<tr>
<td>Clear</td>
<td>Kennedy, Steve</td>
</tr>
</tbody>
</table>

Contact SciQuest@auckland.ac.nz for assistance in generating a directory of barcodes for users, locations and/or sublocations.

8.1.2 Performing Scan Transactions to change item owner/location

1) Select File > Scan Operations

The name and location of the person logged into SciQuest ERM is shown
2) Scan the **Check In** barcode

_The Current Function will change to “Transfer”_

3) Scan the barcode of the item’s Principal Investigator owner

4) Scan the barcode of the item’s new location or sublocation

5) Scan the HazTRAC barcode of the item(s) that are to be transferred

_These barcodes can be entered manually by selecting “Keyboard Entry”_

6) Scan the **Done** barcode

The item will update in SciQuest ERM with a status of Available.

---

**Further steps for receipting MPI restricted items**

For MPI restricted items, it is compulsory to enter the following information into SciQuest:

- MPI restricted status (true)
- BACC#
- Document repository ID#
- Donor species DNA (insert donor species) (only for GMO)
- Host organism – species (only for GMO)
- Host organism – subspecies (only for GMO)
- HSNO approval # (for GMO and competent cells)
- Import permit number
- Insert (only for GMO)
- Transfer permit # (this can be obtained from the lab manager/technical team leader)
- Vector (only for GMO)

To input the above information:

- Go to the **Search** tab. Search for the item by **barcode** in the **inventory** tab.
- Right click the selected container in the result pane
- Select **Container Operations**, then **Edit**
- Enter the information under the **Additional Fields** table

---

### 8.2 Disposal with a Scanner

Chemicals may be quickly disposed of in bulk using Scan Operations. Biological items require a more rigorous record of disposal – please refer to section 10.1 for more details.

1) Use the provided Barcode Disposal Sheet, or generate a barcode worksheet with the functions “Dispose” and “Dispose Empty”
2) Select **File > Scan Operations**
3) Scan the “Dispose” or “Dispose Empty” barcode as required (Dispose Empty means that the material was used up before disposal and “Dispose” means that some material was disposed).
4) Scan the barcodes to be disposed
5) Scan the “Done” barcode
9 Naming Locations and Sublocations

Locations and Sublocations are structured within SciQuest ERM to assist in finding chemicals and biologicals across the University.

Terms used are in line with those used in the university insite website (http://floorplans.auckland.ac.nz/NetFM/space_viewer_start.aspx?db=aumxprd)

1. **Site**: Sector number has to be included (e.g. Sector 500 Grafton for most of FMHS, Sector 300 City for most of SCS, Sector 100 City for most of SBS).

2. **Building**: Please refer to the building number used in the insite website

3. **Floor**: Please be aware that sometimes “G” is used to refer to the ground level while “0” is used in some buildings, please refer to the insite website

4. **Room**: the website does not put the floor number in front of the room name (e.g. 034 instead of B034 which is the usual label on the door) but floor name is included in SciQuest.
9.1 Locations

Location names are fixed. Example of Location:

1. Site (Sector 300 city)
2. Building (301)
3. Floor (6)
4. Room (609, 614, 624)

9.2 Sublocations

Possible storage locations within Rooms (4) are called sublocations and can be added by the DLP.

Sublocation types and their levels, currently loaded in SciQuest, are:

<table>
<thead>
<tr>
<th>Sublocation type</th>
<th>Abbreviation</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bay</td>
<td>Bay</td>
<td>1</td>
</tr>
<tr>
<td>Fridge</td>
<td>FG</td>
<td>2</td>
</tr>
<tr>
<td>Freezer</td>
<td>• FZ (any freezer that is not -80) • 80 (-80 freezer)</td>
<td>2</td>
</tr>
<tr>
<td>Dewar</td>
<td>DW</td>
<td>2</td>
</tr>
<tr>
<td>Cupboard</td>
<td>• CB (any other cabinet/cupboard that does not have an abbreviation) • UF (under fume hood cupboard/cabinet) • DC (drug cabinet/drug safe)</td>
<td>2</td>
</tr>
<tr>
<td>Fumehood</td>
<td>FC</td>
<td>2</td>
</tr>
<tr>
<td>Solvent cabinet</td>
<td>SC</td>
<td>2</td>
</tr>
<tr>
<td>Corrosive cabinet</td>
<td>CC</td>
<td>2</td>
</tr>
<tr>
<td>Dangerous goods cabinet</td>
<td>DG</td>
<td>2</td>
</tr>
<tr>
<td>Dessicator</td>
<td>DS</td>
<td>2</td>
</tr>
<tr>
<td>Toxic cabinet</td>
<td>TC</td>
<td>2</td>
</tr>
<tr>
<td>Shelf</td>
<td>Shelf</td>
<td>3</td>
</tr>
<tr>
<td>Drawer</td>
<td>Drawer</td>
<td>3</td>
</tr>
<tr>
<td>Rack</td>
<td>Rack</td>
<td>4</td>
</tr>
<tr>
<td>Stack</td>
<td>Stack</td>
<td>4</td>
</tr>
<tr>
<td>Bin</td>
<td>Bin</td>
<td>5</td>
</tr>
<tr>
<td>Box</td>
<td>Box</td>
<td>6</td>
</tr>
<tr>
<td>Cane</td>
<td>Cane</td>
<td>6</td>
</tr>
<tr>
<td>Grid</td>
<td>Grid</td>
<td>10</td>
</tr>
</tbody>
</table>
Sublocations examples as follows:

<table>
<thead>
<tr>
<th>F</th>
<th>G Type</th>
<th>H Type</th>
<th>I Type</th>
<th>J Type</th>
<th>K Type</th>
<th>L Type</th>
<th>M Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bay-1</td>
<td>Bay (Level 1)</td>
<td>Freezer (Level 2)</td>
<td>Shelf-3</td>
<td>Shelf (Level 3)</td>
<td>Box-1</td>
<td>Box (Level 6)</td>
<td></td>
</tr>
<tr>
<td>FZ-2</td>
<td>Freezer (Level 2)</td>
<td>Shelf-1</td>
<td>Shelf (Level 3)</td>
<td>Box-1</td>
<td>Box (Level 6)</td>
<td>Grid A01</td>
<td>Grid (Level 10)</td>
</tr>
<tr>
<td>Bay-1</td>
<td>Bay (Level 1)</td>
<td>Shelf-12</td>
<td>Shelf (Level 3)</td>
<td>Box-3</td>
<td>Box (Level 6)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelf-13</td>
<td>Shelf (Level 3)</td>
<td>Box-39</td>
<td>Box (Level 6)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each sublocation layer has to be assigned a type. (e.g. Freezer, Shelf, Box etc) and then

Each sublocation type has to be assigned a level (i.e. levels 1, 2, 3, 4, 5, 6, 10).

Preceding the sublocation type a smaller level has to be entered e.g.

Level 1 → Level 2 → Level 5 → Level 10

Level 1 → Level 5 → Level 10

Level 2 → Level 5 → Level 10

Level 2 → Level 10

Examples

The above examples show:

- Fumehood#15 in room 709 on the 7th floor of Building 301 in Sector 300 of the City Campus
- Dessicator#3 in room 709 on the 7th floor of Building 301 in Sector 300 of the City Campus
- Fridge #1 in room 709 on the 7th floor of Building 301 in Sector 300 of the City Campus
- Shelf#1 in Bay#1 in room 624 on the 6th floor of Building 301 in Sector 300 of the City Campus
- Grid A01 in Box 01 in Shelf 1_Rack A inside Freezer 80-1 located at room 317 on the 3rd floor of building 502 of the Grafton Campus

9.3 Standardised nomenclature for shelves, racks, boxes and grids

Please refer to the University of Auckland Containment Procedure 8 for standardised nomenclature for shelves, racks, boxes and grids.
10 Disposal processes

10.1 Disposing of Hazardous and Restricted Materials
Some hazardous chemicals need to be transferred to a holding area (e.g. hazardous goods bunker) for disposal. These disposals require further action from either you DLP and Hazard Approver.

10.1.1 Disposing of Chemicals
*Note – this operation can be performed with a Scanner. Refer to section 8.2 for instructions.*

Go to the Search tab. Search for the Container.

**Right Click** the selected container in the result pane.

Select **Container Operations**, then **Dispose**

Select **Dispose** if the container is not empty, or **Dispose Empty** if it is.

10.1.2 Disposing of Biologicals
(Note that cell lines that are thawed for use or culture should be “disposed empty” in the same method as chemicals above).

Go to the Search tab. Search for the container.

**Right Click** the selected container in the result pane.

Select **View Container**, click the Edit button
Click on the ellipsis button next to the **Disposal** field.

Depending on the disposal method, choose either **Destroyed – Chemical Disinfection** or **Destroyed – autoclaved**. If the biological has been exported or transferred out of the University of Auckland rather than disposed, select the correct code here. Click **OK**.

Save the change by clicking the **Save** button.

The next step is to set the status of the item to “Disposed”. This can be done in bulk using a scanner (see section 8.2) or manually as follows:
Right click the selected container in the result pane.

Select **Container Operations**, then **Dispose**

Select **Dispose**

### 10.2 Handling of chemicals that need to be transferred to the dangerous goods store for disposal

#### 10.2.1 Waste solvents

Mixing of chemicals prior to disposal is generally discouraged.

However, some solvents can be combined for waste disposal. They are “Waste non-chlorinated solvent” and “Waste chlorinated solvent”.

These solvents can remain in the laboratory before transferring to the dangerous goods store for disposal. Follow these procedures to ensure tracking of such chemicals.

Create a new container of “**Waste non-chlorinated solvent**” or “**Waste chlorinated solvent**”

Go to the **Materials** tab

Press the **Clear** button to remove any previous/residue search criteria

Enter either “**Waste non-chlorinated solvent**” or “**Waste chlorinated solvent**” in the **Name/Identifier** field.

Click the **Search** button
Right Click either “Waste non-chlorinated solvent” or “Waste chlorinated solvent” in the result pane.

Select the Create Container option

Provide the locations, barcode and amount (maximum capacity of the container) of the container. Select “UOA created” as the supplier. Press Save.

Collect used solvent in the waste solvent container. When it is full, contact the lab manager/technical team leader/dangerous waste person, to organise transfer to the dangerous goods store.

Record the transfer to the dangerous good store by going to the Search tab.

Search for the waste solvent container.

Right Click the container in the result pane.

Select Container Operations and then Transfer.
10.2.2 Unwanted dangerous chemicals

Contact the lab manager/technical team leader/dangerous waste person to organise transfer to the dangerous goods store.

Record the transfer to the dangerous goods store by going to the Search tab.

Search for the container of unwanted dangerous chemical.

Right Click the container in the result pane.

Select Container Operations and then Transfer.

Change the locations to the on-site dangerous goods store.
Outline of the Procurement Process

<table>
<thead>
<tr>
<th>SciQuest ERM – High Level Process for Ordering, receiving, bar coding and scanning into a lab</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reorderer</strong></td>
</tr>
<tr>
<td>Shopping Cart Created in SciQuest ERM</td>
</tr>
<tr>
<td><strong>Reorderer</strong></td>
</tr>
<tr>
<td><strong>Receiver</strong></td>
</tr>
<tr>
<td>Order Arrives</td>
</tr>
<tr>
<td>Item Barcoded and received into SciQuest ERM</td>
</tr>
<tr>
<td><strong>DLP</strong></td>
</tr>
<tr>
<td>Review Shopping Cart</td>
</tr>
<tr>
<td><strong>STC/ U&amp;Services</strong></td>
</tr>
<tr>
<td>Import Order in PeopleSoft or Technology One</td>
</tr>
<tr>
<td>Submit Order (Triggers Hazard and Financial Reviews)</td>
</tr>
<tr>
<td>PO Created</td>
</tr>
<tr>
<td><strong>Hazard Approver</strong></td>
</tr>
<tr>
<td>Approve any Hazardous or Restricted Items</td>
</tr>
<tr>
<td><strong>Receiver</strong></td>
</tr>
<tr>
<td>Collect Item(s)</td>
</tr>
<tr>
<td>Scan Item into new lab location</td>
</tr>
</tbody>
</table>
## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biological</td>
<td>A material created from a living organism</td>
</tr>
<tr>
<td>CAS number</td>
<td>A unique number used to identify chemicals</td>
</tr>
<tr>
<td>Container</td>
<td>Any vessel that holds a material. All containers must be owned by a current PI</td>
</tr>
<tr>
<td>Container Flex Field</td>
<td>A field to record important details regarding your biological items</td>
</tr>
<tr>
<td>DLP</td>
<td>The Designated Laboratory Person is responsible for validation and control of Shopping Carts and communications with STC regarding these. Ensures quality, health and safety standards are adhered to and also receives and identifies the final location of goods</td>
</tr>
<tr>
<td>eMolecules</td>
<td>A gateway to search for smaller chemical companies</td>
</tr>
<tr>
<td>SciQuest ERM</td>
<td>SciQuest Enterprise Reagent Manager</td>
</tr>
<tr>
<td>Hazard Approver</td>
<td>Able to approve Shopping Carts of Hazardous chemicals and biologicals which require extra precautions, permits and documentation</td>
</tr>
<tr>
<td>Hosted Catalogs</td>
<td>A number of suppliers form the Hosted Catalogs. These are the University’s key suppliers of laboratory products and most of them are managed by way of formal contracts. Price comparisons are able to be made.</td>
</tr>
<tr>
<td>Material</td>
<td>Any chemical or biological in the inventory system</td>
</tr>
<tr>
<td>MDL</td>
<td>Chemical table file format. They are text files that adhere to a strict format for representing multiple chemical structure records and associated data fields.</td>
</tr>
<tr>
<td>MPI</td>
<td>Ministry for Primary Industries, a regulatory body for hazardous and restricted materials</td>
</tr>
<tr>
<td>MPI Restricted</td>
<td>An item that requires MPI authorisation to import or transfer.</td>
</tr>
<tr>
<td>MSDS</td>
<td>Material Safety Data Sheets</td>
</tr>
<tr>
<td>Non-Hosted Catalogue</td>
<td>Requests for Non-Hosted Catalogue items can only be made through SciQuest ERM if the vendor is set up in PeopleSoft Financials.</td>
</tr>
<tr>
<td><strong>PeopleSoft Financials</strong></td>
<td>Financial and purchasing system used by the University of Auckland</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>PI</strong></td>
<td>A PI (Principal Investigator) in SciQuest ERM is the responsible owner of chemicals and risk biologicals purchased by them or for them</td>
</tr>
<tr>
<td><strong>Receiving Locations</strong></td>
<td>Primary delivery locations for receiving SciQuest ERM Orders into the University</td>
</tr>
<tr>
<td><strong>Recipient</strong></td>
<td>This is the Principal Investigator or the project leader. In all cases the Principal Investigator is responsible for Health &amp; Safety and Containment</td>
</tr>
<tr>
<td><strong>Researcher</strong></td>
<td>A researcher in SciQuest ERM is a PI, technician, or student</td>
</tr>
<tr>
<td><strong>Shopping Cart</strong></td>
<td>Requisitions are saved in the form of a Shopping Cart</td>
</tr>
<tr>
<td><strong>STC</strong></td>
<td>Shared Transaction Centre. A team within University of Auckland Finance Service Division who are responsible for processing Shopping Carts (purchase orders) placed through SciQuest.</td>
</tr>
<tr>
<td><strong>Stock Room</strong></td>
<td>On-site stores that sell commonly used consumables and/or chemicals. Internal requests can be made to purchase items in the stockrooms. Stockrooms are also where most orders are delivered.</td>
</tr>
<tr>
<td><strong>Storage Area</strong></td>
<td>Location where chemicals may be stored but, no wet lab activity is carried out</td>
</tr>
<tr>
<td><strong>Super User</strong></td>
<td>A frequent user of SciQuest ERM and first point of contact for minor issues</td>
</tr>
<tr>
<td><strong>TechnologyOne</strong></td>
<td>The Finance system used by Uniservices</td>
</tr>
</tbody>
</table>