## Contents

1 **Introduction** .............................................................................................................................. 4  
   1.1 The purpose of this document ................................................................................................. 4  
   1.2 Training .................................................................................................................................. 4  
   1.3 Overview of Tabs and their Uses ............................................................................................. 5  
   1.4 Setting up your Preferences ..................................................................................................... 6  
      1.4.1 User Tab .......................................................................................................................... 6  
      1.4.2 Container Tab .................................................................................................................. 6  
      1.4.3 Structure Search Tab ....................................................................................................... 7  

2 **Searching** ................................................................................................................................ 8  
   2.1 Basic Searches .......................................................................................................................... 10  
   2.2 Advanced searches .................................................................................................................. 11  
      2.2.1 Inventory Tab .................................................................................................................. 11  
      2.2.2 Advanced Inventory Tab – Searching by Owner ................................................................. 12  
      2.2.3 Biological searches ......................................................................................................... 13  
      2.2.4 Hosted Catalogue searches .............................................................................................. 14  
      2.2.5 Drawing structure searches ............................................................................................ 14  
      2.2.6 Refining your searches using the result pane ................................................................. 16  
      2.2.7 Drawing structure search of your inventory using Structure Search Tab ....................... 18  

3 **Shopping Cart processes** ......................................................................................................... 21  
   3.1 Hosted Catalogue and e-Molecule processes ......................................................................... 21  
      3.1.1 Searching for Items ........................................................................................................ 21  
      3.1.2 Adding Materials to the Shopping Cart ........................................................................... 22  
      3.1.3 Completing the Shopping Cart ......................................................................................... 23  
      3.1.4 Saving the Shopping Cart and Emailing your DLP ......................................................... 29  
      3.1.5 Order Arrives ................................................................................................................ 30  
   3.2 Non-Hosted Catalogue processes ............................................................................................. 30  
      3.2.1 Non-Hosted Catalog Items Tab ..................................................................................... 30  
      3.2.2 Adding Items to the Shopping Cart ............................................................................... 33  
      3.2.3 Saving the Shopping Cart and Emailing your DLP ....................................................... 36  
      3.2.4 Order Arrives ................................................................................................................ 37  
   3.3 Stock Room processes .............................................................................................................. 37
1 Introduction
Welcome to 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)
• the Hazard Approver

This manual is for a Researcher and the permissions you have in SciQuest ERM allow you to:
➢ Search for materials
➢ Create and save a requisition in the form of a Shopping Cart
➢ Create materials and containers
➢ Transfer materials
➢ Dispose of materials

Other roles in SciQuest ERM are the Designated Laboratory Person (DLP) who approves your Shopping Cart and the Hazard Approver who approves any Shopping Carts 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 a requisition as a Shopping Cart
5. Receiving processes
6. Working with Materials
7. Working with Containers
8. Disposing processes
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 Researcher / Student.

<table>
<thead>
<tr>
<th>Structure Search Tab</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favourites Tab</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>Search Tab</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>Shopping Cart Tab</td>
<td>Displays the requested materials from your Search. You can save requisitions and container requests.</td>
</tr>
<tr>
<td>Orders Tab</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>Receiving Tab</td>
<td>Allows you to receive containers, assign and or print Barcodes.</td>
</tr>
<tr>
<td>Materials Tab</td>
<td>You can search for and view ERM materials by various criteria. ALL researchers 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

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. If you are a Principal Investigator, check that 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

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 going to be generated by SciQuest ERM.
1.4.3 Structure Search Tab

Select the drawing tool to be used.

![Structure Search Tab](image)
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 that you are assigned to.

- **Storage Area searches**
  Searches specific areas used for storage of chemicals where no wet lab activity is carried out.

- **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 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>
</table>
| **Name**          | Chemical name, description or alias. Text can be entered or pasted from another application.  
**Searching Hosted Catalogues:**  
No wildcards are used for searching Hosted Catalogues. Search by product name, such as *potassium chloride* or *gloves*. This searches for the words in the order listed, so *latex gloves* gives different results to *gloves latex*.  
**Searching Inventory and Storage Areas (your inventories):**  
Wildcards (*) 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 (*) to search for partial text strings:  
E.g. to search for Potassium chloride:  
*Potas* will return all materials that begin with “Potas”.  
*chloride* will return all materials that end with “chloride”.  
*Potas*chlor* will return all materials that contain the text “Potas” followed by “chlor” with anything in-between, and anything at the start or end. |
| **CAS #**         | Using a CAS number is one of the easiest ways to search. 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. |
| **Catalog #**     | Search using the Vendor’s catalogue or manufacturer part number. Text can be entered or pasted from another application. |
| **Identifier**    | Search using either a customer compound identifier number, MDL number, or a SciQuest chemical number. Select the type prior to entering number. |
| **Mol Wgt Range** | Search using a Molecular weight range. If only a low value is entered, the search is a greater-than-or-equal-to search. If only 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 narrows your search. You use the Inventory function button. Click the Inventory function button to bring up the dialogue window. Click Location and select one of the options e.g. Location Selection, Default Room or Clear Location</td>
</tr>
</tbody>
</table>

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.

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.
### 2.2.3 Biological searches

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

<table>
<thead>
<tr>
<th>Search field name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. MPI_Restricted</td>
<td>MPI restriction status. 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>For 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>For GMO, description of insert</td>
</tr>
<tr>
<td>Transfer Permit #</td>
<td>MPI transfer permit</td>
</tr>
<tr>
<td>Vector</td>
<td>For GMO, description of vector</td>
</tr>
</tbody>
</table>

Click the Container Flex Fields function and search using any of the following fields:
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.

<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 in any order will be 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, will be 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, will be 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. Must include and all words entered in this field will be excluded.</td>
</tr>
</tbody>
</table>

2.2.5 Drawing structure searches

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 Example](image)

• **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.

  ![Multiple Sort Example](image)

• **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.
3 Shopping Cart processes

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

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

3.1 Hosted Catalogue and e-Molecule processes
Researchers 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 the Shopping Cart
- Save and Email the Shopping Cart, with correct documentation where required, to your DLP
- Order Arrives

3.1.1 Searching for Items
Once you have found the item(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 shopping cart interface]

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 <strong>Select a Recipient</strong> 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 Center</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. <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 <strong>Supplemental Information</strong> section)</em> 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.</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</td>
</tr>
<tr>
<td></td>
<td></td>
<td>times.</td>
</tr>
<tr>
<td>Supplmental</td>
<td>MPI Restricted</td>
<td>Indicate whether the requested item is MPI restricted.</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td>This field defaults to <strong>true</strong>. If the material is not MPI restricted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the ***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,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Auckland order will be charged to:</td>
</tr>
<tr>
<td></td>
<td>775020</td>
<td>Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases</td>
</tr>
<tr>
<td></td>
<td>775040</td>
<td>Consumables - Lab/Workshop</td>
</tr>
<tr>
<td></td>
<td>775070</td>
<td>Consumables - Health and Safety</td>
</tr>
<tr>
<td></td>
<td>775095</td>
<td>Consumables – haz chems/restricted biols/radioisoctes/vet meds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This value can be overridden at the item line level to adjust the account</td>
</tr>
<tr>
<td></td>
<td></td>
<td>code an item will be charged to.</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. This value can be overridden at the item line level to adjust the product code an item 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. <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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cost Centre</th>
<th>Format of RH_UniServices_Account_Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<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>
<td></td>
</tr>
<tr>
<td>(Only used by UniServices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating Centres)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UniServices HOD Account</td>
<td>99999 (a five digit code)</td>
<td></td>
</tr>
<tr>
<td>UniServices Project</td>
<td>99999.999 (a five digit code with a 3 digit suffix)</td>
<td></td>
</tr>
</tbody>
</table>

This value can be overridden at the item line level to adjust the account number an item will be charged to.
3.1.3.2 Requisition Line Items

The requisition line items displayed the individual items being requested:

<table>
<thead>
<tr>
<th>Ordered</th>
<th>CAS #</th>
<th>Catalog #</th>
<th>Product</th>
<th>Supplier</th>
<th>Package Qty</th>
<th>Package Unit</th>
<th>Price</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>647-14-8</td>
<td>793566-25K0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3976-1-0</td>
<td>79352-10ML</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Button / Field | Description
--- | ---
Mark Item as Favorite | Marks the selected item as a ‘Favorite’.
Edit Item | Opens the Line Item dialog for the selected item
Delete Item | Removes the selected item from the order set
Ordered | Editable field that contains the quantity of the item to be requested. The default Ordered Quantity is ‘1’.

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 and Emailing your DLP

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

- **Saving the Shopping Cart**

  Click the **Save As** button.

  ![Image of SciQuest interface showing the Save As button highlighted]

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

  ![Image of dialogue window for saving 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.

  ![Image of successful save dialogue window]

  Click **OK** to continue.

- **Emailing your DLP**

  The DLP will review your Shopping Cart and pass on to STC or Uniservices for processing. If there is an issue with the Shopping Cart the DLP advises you to remedy and resend. The DLP works with you to ensure that appropriate materials are being requested.

  **Note:** The email must have the following

  - Saved Shopping Cart name
  - Supporting documentation such as MPI Import permit (when importing restricted materials)
**Quick Tip:** Once you have closed the Shopping Cart you are not able to add anything to it so **Click Reset** button to make another Shopping Cart.

### 3.1.5 Order Arrives

Once the Shopping Cart has been processed by STC or UniServices it becomes an Order. When the Order arrives it will be received and checked into the SciQuest ERM. The DLP determines where the items are to be located.

### 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.

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

- **Add** item to the Shopping Cart
- **Complete** the Shopping Cart
- **Save and Email** the Shopping Cart name, with correct documentation where required, to your DLP
- **Order arrives**

**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 <strong>Select a Recipient</strong> 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 Center</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. <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</td>
<td>MPI Restricted</td>
<td>Indicate whether the requested item is MPI restricted.</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td>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 bios/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>
</tbody>
</table>
### Panel

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RH_PRODUCT_CODE *</td>
<td>Displays the PeopleSoft Financials product code (optional) this University of Auckland order will be charged to.</td>
</tr>
</tbody>
</table>
| RH_UniServices_Account_Number* | Displays the Technology One account number this UniServices order will be charged to.  
**This field must be populated when a UniServices cost centre code has been selected and must be in the appropriate format:**  
**UniServices GL Account**  
(Only used by UniServices Operating Centres)  
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.  
**UniServices HOD Account**  
99999 (a five digit code)  
**UniServices Project**  
99999.999 (a five digit code with a 3 digit suffix)  

### 3.2.2 Adding Items to the Shopping Cart

To add items 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 Supplier menu button opens the Select a Vendor dialogue to enable you to select a supplier for the item. Non-catalogue items can only be purchased from suppliers loaded in SciQuest and PeopleSoft Financials. When the supplier is not found in SciQuest, contact the STC to undergo a formal process to set up the supplier.</td>
</tr>
<tr>
<td>Catalog # (*)</td>
<td>The supplier’s catalogue number for the item</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>Button / Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</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 or 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 order 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>
<tr>
<td></td>
<td>The drop-down list is populated with the recipient's Preferred Delivery Location entries (from the Preferences &gt; 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.</td>
</tr>
</tbody>
</table>
It is compulsory to declare 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 the requested item is one of the above, click the box next to the appropriate list and change the status to true.

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.

### 3.2.3 Saving the Shopping Cart and Emailing your DLP

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

- **Saving the Shopping Cart**

  Click the **Save As** button.

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

  **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 yourShopping Cart has been successfully saved appears.
Click **OK** to continue.

- **Emailing your DLP**
  The DLP will review your Shopping Cart and pass on to STC or Uniservices for processing. If there is an issue with the Shopping Cart the DLP advises you to remedy and resend. The DLP works with you to ensure that appropriate materials are being ordered.

  **Note:** The email must have the following
  - Saved Shopping Cart name
  - Supporting documentation such as MPI Import permit (when importing restricted materials)

  **Quick Tip:** Once you have closed the Shopping Cart you are not able to add anything to it so **Click Reset** button to make another Shopping Cart

### 3.2.4 Order Arrives

Once the Shopping Cart has been processed by STC or Uniservices it becomes an Order. When the Order arrives it will be received and checked into the SciQuest ERM. The DLP determines where the materials are to be located.

### 3.3 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**

### 3.3.1 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.
3.3.2 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 links 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 to add this to the Favourites Tab

3.3.3 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.

![Successful Requisition](image)

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

![Print Confirmation](image)

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

**3.3.4 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     Working with Materials
As a Researcher you may need to search for, view and create a new material (e.g. newly created chemicals, newly created genetically modified organisms).

4.1 Searching for Materials
Researchers 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 alternatively 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).
4.2 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.

NFPA/HMIS Properties & Lists
You can find information here on NFPA ratings, HMIS ratings, alerts and associated lists
4.3 Creating a new Material

As a Researcher 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.
4.3.1 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 4.3 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 5.1 Creating a new container).
5 Working with Containers

Note: All container owners must be current Principal Investigators.

5.1 Creating a new Container
As a Researcher 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.

### 5.1.1 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**
5.2 Replicating an existing container

As a Researcher 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, either SciQuest ERM automatically generates a Barcode(s) for the new container(s) or allows you to scan/enter pre-printed Barcode(s).
5.3 Viewing a container
Go to the Search tab. Search for the container.

Right Click the selected container in the result pane.

Select View Container

5.4 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.

5.5 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](image)

### 5.6 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.

![Transfer Containers](image)

- **Changing the storage location**
  
  You can change the storage location by **Pressing** the **Use** button and changing the location or **pressing** the **Storage** button and changing the location.
Press the **Transfer** button to confirm the transfer.

- **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.

  The transfer of ownership and location is recorded and can be checked under **Container History**
5.7 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**
6   Scan Operations

6.1   Changing location/owner with a Scanner

A Scan Transaction 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

6.1.1   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”.

Contact SciQuest@auckland.ac.nz for assistance in generating a directory of barcodes for users, locations and/or sublocations.
6.1.2  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*

![Image of Scan Operations window]

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”*

![Image of Scan Operations window with barcodes]

6)  Scan the **Done** barcode

   The item will update in SciQuest ERM with a status of Available.
6.2 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

7 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 SCS, Sector 100 City for 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.

### 7.1 Locations

Location names are fixed. Example of Location:

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

### 7.2 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</th>
<th>H</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sublocation 1</td>
<td>Sublocation 1 Type</td>
<td>Sublocation2</td>
<td>Sublocation2 Type</td>
<td>Sublocation3</td>
<td>Sublocation3 Type</td>
<td>Sublocation4</td>
</tr>
<tr>
<td>Bay-1</td>
<td>Bay (Level 1)</td>
<td>FZ-1</td>
<td>Freezer (Level 2)</td>
<td>Shelf-3</td>
<td>Shelf (Level 3)</td>
<td>Box-1</td>
</tr>
<tr>
<td>Bay-1</td>
<td>Bay (Level 1)</td>
<td>Shelf-12</td>
<td>Shelf (Level 3)</td>
<td>Box-1</td>
<td>Box (Level 6)</td>
<td>Grid A01</td>
</tr>
<tr>
<td>Shelf-13</td>
<td>Shelf (Level 3)</td>
<td>Box-35</td>
<td>Box (Level 6)</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

- 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

7.3 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.
8 Disposal processes

8.1 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. Notify your DLP for disposal of such items.

8.1.1 Disposing chemicals
Note – this operation can be performed with a Scanner. Refer to section 6.2 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 Containers

Select Dispose if the container is not empty or Dispose Empty.

8.1.2 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 ellipses 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 6.2) or manually as follows:
Right click the selected container in the result pane.

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

Select **Dispose**

**Outline of the Procurement Process**
## 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>PeopleSoft Financials</td>
<td>Purchasing system used by Finance</td>
</tr>
<tr>
<td>----------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>PI</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>Receiving Locations</td>
<td>Primary delivery locations for receiving SciQuest ERM Orders into the University</td>
</tr>
<tr>
<td>Recipient</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>Researcher</td>
<td>A researcher in SciQuest ERM is a PI, technician, or student</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>Requisitions are saved in the form of a Shopping Cart</td>
</tr>
<tr>
<td>STC</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>Stock Room</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>Storage Area</td>
<td>Location where chemicals may be stored but, no wet lab activity is carried out.</td>
</tr>
<tr>
<td>Super User</td>
<td>A frequent user of SciQuest ERM and first point of contact for minor issues</td>
</tr>
</tbody>
</table>