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

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

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**

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.
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:

![Shopping Cart message](image)

**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
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.

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. This field is not editable.</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. University of Auckland: The Cost Centre code is required for PeopleSoft Financials accounting purposes. UniServices: 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. (see Supplemental Information section)</td>
</tr>
</tbody>
</table>

You can only select one Cost Centre per cart.
### Panel | Field Name | Description
--- | --- | ---
Requestor/Dates | Requestor | Displays the name of the user creating the request.  
*This field is not editable.*
| Phone # | Displays the phone number of the user creating the request.  
*This field is not editable.*
| Requisition # | Displays the ERM requisition number, once the request has been submitted.  
*This field is not editable.*
| Date Submitted | Displays the date when the request was submitted.  
*This field is not editable.*
| Date Required | This field should not be changed as it has no effect on order processing times.

### Supplemental Information

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| MPI Restricted | 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.  
If items in the same shopping cart have different MPI Restricted status, they need to be modified individually at the requisition line items level.  
If all items have the same MPI Restricted status, they do not need to be modified individually at the requisition line items level. |

<table>
<thead>
<tr>
<th>RH_ACCOUNT_CODE*</th>
<th>Displays the PeopleSoft Financials account code this University of Auckland order will be charged to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>775020</td>
<td>Consumables – Non Hazardous Chemicals/Pharmaceuticals/Gases</td>
</tr>
<tr>
<td>775040</td>
<td>Consumables - Lab/Workshop</td>
</tr>
<tr>
<td>775070</td>
<td>Consumables - Health and Safety</td>
</tr>
<tr>
<td>775095</td>
<td>Consumables – haz chems/restricted biols/radionuclides/vet meds</td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th>Panel</th>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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. This field must be populated when a UniServices cost centre code has been selected and must be in the appropriate format:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Format of RH_UniServices_Account_Number**

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

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.
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 (UN 6.1 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.
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.
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.

**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>
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<tr>
<th>Panel</th>
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<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. This field is not editable.</td>
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<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. University of Auckland: The Cost Centre code is required for PeopleSoft Financials accounting purposes. UniServices: Three cost centre codes specific to UniServices are available.</td>
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When a UniServices cost centre code is selected, it is also necessary to supply the UniServices account number. *(see Supplemental Information section)*
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<td>Requestor</td>
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<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>
</tbody>
</table>

**Supplemental Information**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<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. If items in the same shopping cart have different MPI Restricted status, they need to be modified individually at the requisition line items level. If all items have the same MPI Restricted status, they do not need to be modified individually at the requisition line items level.</td>
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<td>775095</td>
<td>Consumables – haz chems/restricted biols/radionuclides/vet meds</td>
</tr>
</tbody>
</table>

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.
### 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.**

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<th>Field Name</th>
<th>Description</th>
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</thead>
<tbody>
<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_Account_Number*</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>[Cost Centre]</td>
<td>[Format of RH_UniServices_Account_Number]</td>
</tr>
<tr>
<td></td>
<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>
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<td></td>
<td>UniServices HOD Account</td>
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</tr>
<tr>
<td>Button / Field</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Order Qty (*)</td>
<td>The desired quantity of the item</td>
<td></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 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>.</td>
<td></td>
</tr>
<tr>
<td>Catalog # (*)</td>
<td>The supplier’s catalogue number for the item</td>
<td></td>
</tr>
<tr>
<td>Button / Field</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Pkg Amt (*)</td>
<td>The quantity amount for a container of the item.</td>
<td></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>
<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)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If lot size = 1 then = EA (Each); If lot size &gt; 1 then = CS (case)</td>
<td></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 allow you to select the value.</td>
<td></td>
</tr>
<tr>
<td>CAS #</td>
<td>The CAS number of the item. This must be included for all chemicals.</td>
<td></td>
</tr>
<tr>
<td>MDL #</td>
<td>Unique identification number for each chemical reaction and variation</td>
<td></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>
<td></td>
</tr>
<tr>
<td>Price (*)</td>
<td>The price of the item; accepts 2 decimal places</td>
<td></td>
</tr>
<tr>
<td>Currency (*)</td>
<td>Currency used</td>
<td></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>
<td></td>
</tr>
<tr>
<td>Date Required</td>
<td>This field should not be changed as it has no effect on order processing times.</td>
<td></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>
<td></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>
<td></td>
</tr>
<tr>
<td>Button / Field</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Item flex fields</strong></td>
<td>It is compulsory to declare the item’s hazardous and restricted status if the requested item is:</td>
<td></td>
</tr>
<tr>
<td>(panel)</td>
<td>• MPI Restricted</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Controlled drugs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Radioactive</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Toxic gas (UN 2.3)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Highly reactive (UN 4.1 PG1, UN 4.2 PG1, UN 4.3 PG1)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Highly toxic (UN 6.1 PG1)</td>
<td></td>
</tr>
<tr>
<td>A.1.Account_Code</td>
<td>If the requested item is one of the above, click the next to the appropriate list and change the status to true.</td>
<td></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>
<td></td>
</tr>
<tr>
<td>A.3.PC_Business_Unit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.4.Additional_Note</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.1.MPI.Restricted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.2.Controlled_Drugs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.3.Radioactive_flag</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.4.Toxic_Gas(2.3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.5.Reactives(4)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.6.Highly_Toxic(6.1 PG 1)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Reviewing and Submitting Shopping Carts

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 \( \ldots \) 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, or the DLP)
- 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.
Submitting the Shopping Cart

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

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</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>(Only used by UniServices Operating Centres)</td>
<td></td>
</tr>
<tr>
<td>UniServices HOD Account</td>
<td>99999 (a five digit code)</td>
</tr>
<tr>
<td>UniServices Project</td>
<td>999999.999 (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.

**Submitting the order**

Please email purchasing@uniservices.co.nz with your requisition number, using the UniServices request email template provided on the SciQuest ERM website.

- 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 \ua\Shared\MSCI\HazTrack

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

**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.

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.

![University of Auckland Purchase Order MD0000091187 Dispatched](image)

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>
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</tr>
</tbody>
</table>

**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 in the DLP manual. An item may be Received in the stockroom, but Receipting must be performed by the DLP who submitted the order.**
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**

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.

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

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.

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.