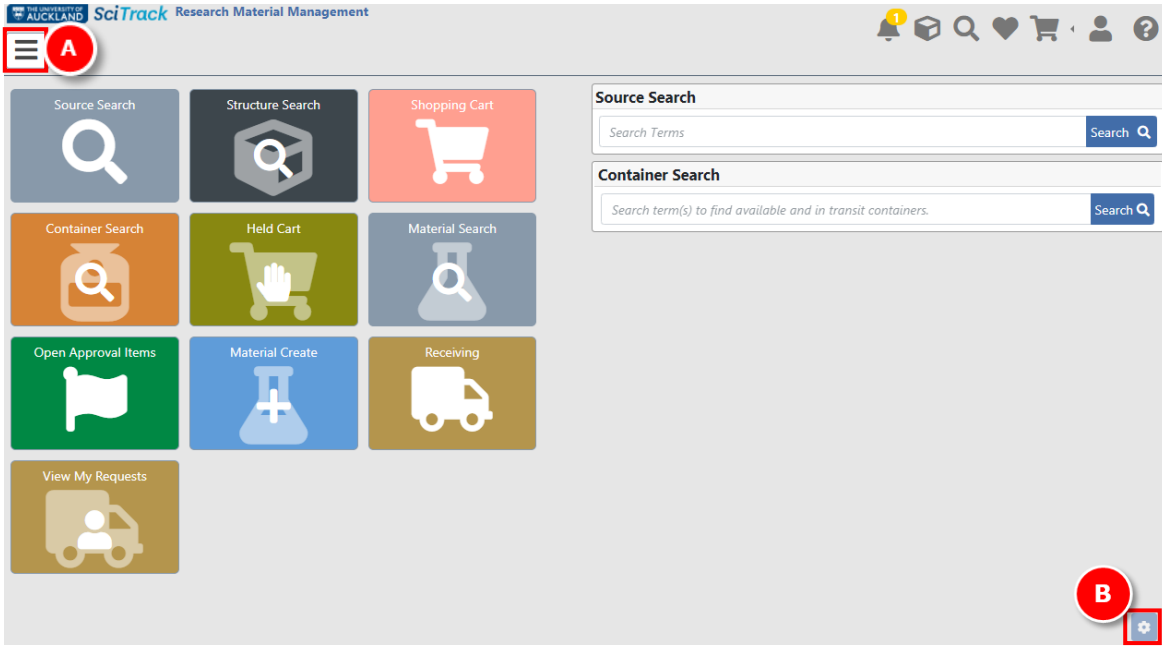


12. Advanced features


Overview

This quick guide describes some extra features of SciTrack.

1. Accessing the menu features
2. Generate reports
3. Scan Operations (to transfer or dispose using a scanner)
4. Generate a barcode worksheet for Scan Operations
5. View SciTrack users and find DLPs

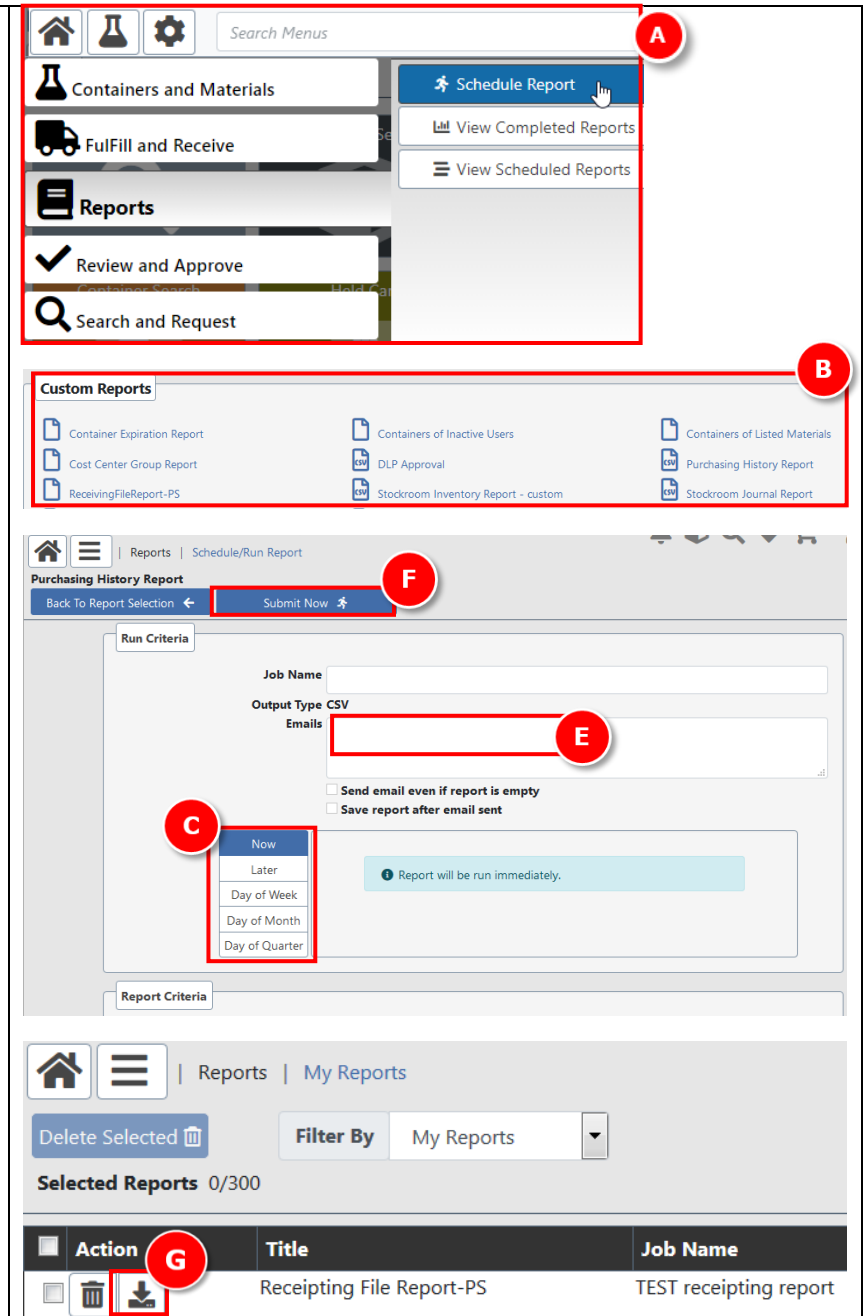
Steps	Screenshot
<p>1. Accessing the menu features</p> <p>A. Additional features can be accessed by clicking the menu icon.</p> <p>B. Alternatively, you can add tiles for the extra features onto your home page. (See quick guide 2. Configure Preferences for more information)</p>	 <p>The screenshot displays the SciTrack Research Material Management interface. At the top, there is a navigation bar with the University of Auckland logo and the SciTrack title. Below the navigation bar, a grid of feature tiles is visible. A red circle labeled 'A' points to the menu icon in the top left corner. A red circle labeled 'B' points to the settings icon in the bottom right corner. The tiles include Source Search, Structure Search, Shopping Cart, Container Search, Held Cart, Material Search, Open Approval Items, Material Create, Receiving, and View My Requests. On the right side, there are search bars for Source Search and Container Search.</p>

2. Generate reports

- A. Click Menu>Reports>Schedule Report.
- B. Choose a report from the Custom Reports section (see descriptions below).
- C. Choose Now or Later to run a one-off report. To schedule reports to run and email you at a regular interval, choose Day of Week, Month or Quarter.
- D. Scroll down to see other criteria.
- E. Type in an email address if you would like the report to be emailed.
- F. Click Submit.
- G. To view your reports, go to Menu>Reports>View Completed Reports and click the download button 

Here are some reports that you may find useful.

Custom Report	Description
Purchasing History Report	View purchasing history for external suppliers for a specified cost centre.
Stockroom Journal Report	Note this is not specific for UniServices. View Stockroom purchasing history for a specified cost centre, or all Stockroom transactions over a specified time period.
DLP approval report	View DLP approval history of carts.



The screenshot illustrates the steps for generating a report in the SciTrack system. It is annotated with letters A through G corresponding to the instructions in the text.

- A:** Points to the 'Schedule Report' button in the top navigation bar.
- B:** Points to the 'Custom Reports' section, which lists various report types such as 'Container Expiration Report', 'DLP Approval', and 'Purchasing History Report'.
- C:** Points to the 'Run Criteria' dropdown menu, which allows users to select when to run the report (Now, Later, Day of Week, Day of Month, Day of Quarter).
- E:** Points to the 'Emails' input field where the user's email address is entered.
- F:** Points to the 'Submit Now' button.
- G:** Points to the 'Download' icon in the 'Action' column of the 'My Reports' table.

The 'My Reports' table at the bottom shows a report titled 'Receiving File Report-PS' with the job name 'TEST receiving report'. The 'Action' column contains icons for deleting and downloading the report.

3. Scan Operations

Use this to transfer or dispose containers using a scanner, as an alternative to using Container Operations. It requires a Container Operations worksheet (see step 4).

→ Make sure to follow these steps in order!

- A. Click Menu>Containers and Materials>**Scan Operations**.
- B. Make sure the cursor is in the Scan field
- C. Scan **Check In** barcode.
- D. Scan barcode of item's Principal Investigator owner.
- E. Scan barcode of item's new location or sub-location.
- F. Scan SciTrack barcode on the container(s)
- G. Scan **Done** barcode.

Bar Code	Label Name	Amount	Status	Location	Owner
UOAC00077044	Acetic acid, glacial 2.5L	2.5 L	AVAILABLE	Sector 500 Grafton>501>B>B33	User-Five, Sciquest

4. Generate a barcode worksheet for Scan Operations

- A. Click Menu> Containers and Materials>**Container Operations Worksheet**.
- B. Select a room to generate a barcode for.
 - For sublocations, you can either scan the sublocation barcode stickers on the physical sublocation, or contact scitrack@auckland.ac.nz for a sheet of sublocation barcodes for your area.
- C. Add "Lab Occupants" who are the container owners. Start typing a name into the blank field, select the correct one, then click **Add Lab Occupant**.
- D. Delete any users you don't need in your worksheet.
- E. Select the scan functions required.
 - Select **Check In** for transferring.
 - Borrow, return and inventory functions should not be used with Scan Operations.
- F. Click **Generate Worksheet** and a pdf will pop up or download, depending on your browser settings. Print out the barcode sheet.

Selected Lab Occupants	Scan Functions for Room
<input type="checkbox"/> UAT User-Two, Sciquest UAT (1560307839895@test.auckland.ac.nz)	<input type="checkbox"/> Check In
<input type="checkbox"/> Dodd, Jo (jr.dodd@auckland.ac.nz)	<input type="checkbox"/> Dispose
<input type="checkbox"/> Dunbar, Rod (r.dunbar@auckland.ac.nz)	<input type="checkbox"/> Dispose Empty
<input type="checkbox"/> Eom, Jennifer (jennifer.eom@auckland.ac.nz)	<input type="checkbox"/> Borrow
<input type="checkbox"/> Hucklesby, James J. (james.hucklesby@auckland.ac.nz)	<input type="checkbox"/> Return
<input type="checkbox"/> Ly, Kien (kn.ly@auckland.ac.nz)	<input type="checkbox"/> Inventory

5. View SciTrack users (and DLP list)

People Search can be used to find a list of SciTrack users. This might be helpful to find out who is a DLP in your area.

- A. Click Menu>Gear icon>People>People Search.
- B. To find DLPs in your area, choose the Role of DLP.
→ Note that the results include users that have not yet chosen a sector yet.
- C. To choose a location to search, click the magnifying glass. Then you can select to search your Sector, a building, a floor, or a room. The third screenshot shows how to choose to search a whole sector.
- D. Click Search
- E. Sort results by clicking any column header

The first screenshot shows the top navigation bar with a gear icon (A) and a 'People Search' button. The second screenshot shows the 'People Search' form with the 'Role' dropdown set to 'DLP' (B), a magnifying glass icon on the 'Location' field (C), and a 'Search' button (D). The third screenshot shows the 'Locations' selection screen with 'Sector 100 City' selected (C) and a dropdown menu for 'Primary Location' with sorting options (E).