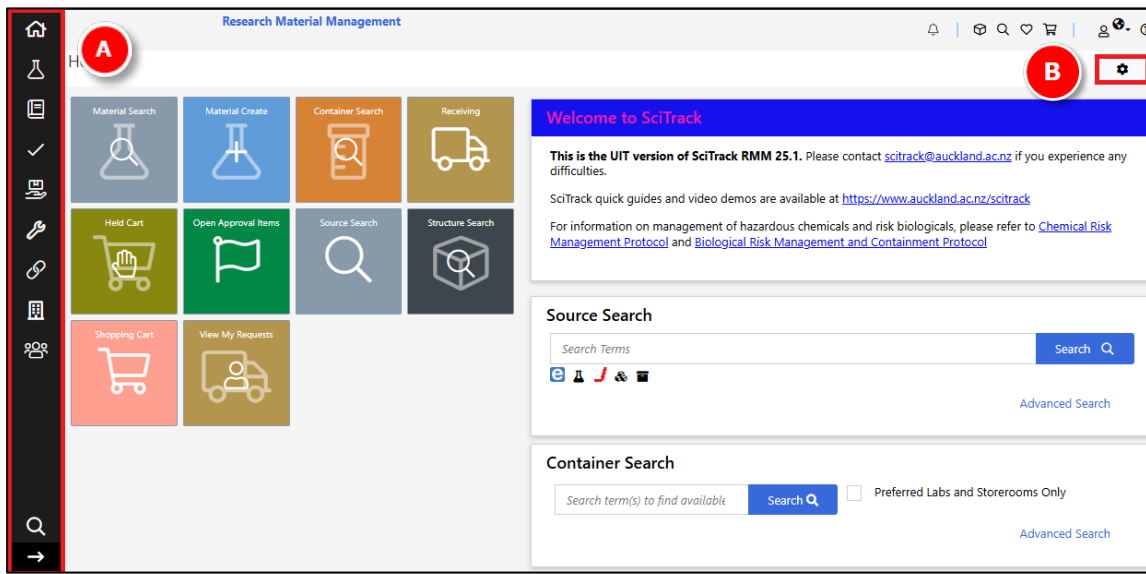


## 12. Advanced features

### 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><b>1. Accessing the menu features</b></p> <p>A. Clicking the arrow at the bottom of the menu bar open the menu in an expanded view. Additional features can be accessed by clicking the menu icons to open additional menus. Alternatively, you can search for the feature with the search icon.</p> <p>B. Alternatively, you can add tiles for the extra features onto your home page. (See quick guide 2. <b>“Configure Preferences”</b> for more information)</p>	 <p>The screenshot displays the SciTrack Research Material Management (RMM) interface. On the left, a vertical sidebar contains a menu bar with an arrow icon at the bottom, labeled 'A'. The main dashboard area features a grid of tiles: 'Material Search', 'Material Create', 'Container Search', 'Receiving', 'Held Cart', 'Open Approval Items', 'Source Search', 'Structure Search', 'Shopping Cart', and 'View My Requests'. On the right side, there is a 'Welcome to SciTrack' banner with a message about the UIT version 25.1 and contact information. Below the banner, there are sections for 'Source Search' and 'Container Search', each with a search bar and a 'Search' button. A 'Preferred Labs and Storerooms Only' checkbox is also present in the Container Search section. A search icon is visible in the top right corner, labeled 'B'.</p>

## 2. Generate reports

- A. Click Menu>Reports>Schedule Report.
- B. Choose a report from the list. A description of each report is given for ease of searching. Reports are grouped based on their type, e.g. 'Purchasing reports'. Clicking the section title from the left menu will jump to that section.
- C. Choose Now or Later to run a one-off report. To schedule reports which run and email you at a regular interval, choose Day of Week, Month or Quarter.
- D. Scroll down to see other criteria such as Location, Owner or Hazard labels, that you can select to fine tune your report.
- E. Type in an email address if you would like the report to be emailed.
- F. Click Submit.
- G. You should be redirected to the "View completed reports page". You can come back to this page by going to Menu>Reports>View Completed Reports. If the status of your report is "Generating", refresh the page until it says "Success". Then click the download

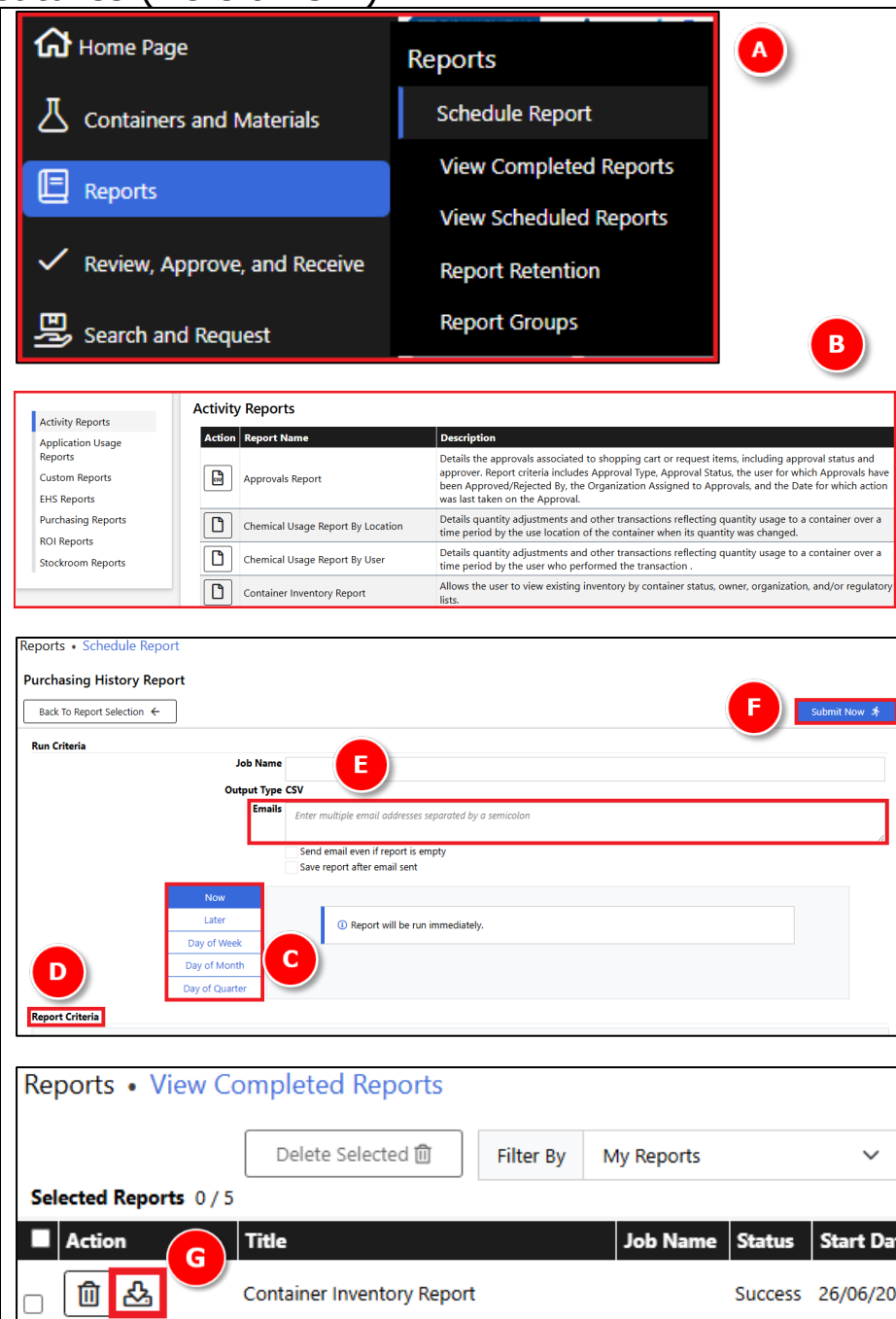


button

*Note, reports asking for large datasets will take longer to run and become available.*

Here are some reports that you may find useful.

Custom Report	Description
<b>Purchasing History Report</b>	View purchasing history for external suppliers for a specified cost centre.
<b>Stockroom Journal Report</b>	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.
<b>DLP approval report</b>	View DLP approval history of carts.



The screenshot shows the SciTrack interface. On the left is a navigation menu with options: Home Page, Containers and Materials, Reports, Review, Approve, and Receive, and Search and Request. The 'Reports' section is highlighted. On the right, a 'Reports' sub-menu is open, showing options: Schedule Report, View Completed Reports, View Scheduled Reports, Report Retention, and Report Groups. Below this, the 'Activity Reports' section is visible, listing various reports like Approvals Report, Chemical Usage Report By Location, Chemical Usage Report By User, and Container Inventory Report. The 'Schedule Report' form is shown, with fields for Job Name, Output Type CSV, Emails, and Run Criteria (Now, Later, Day of Week, Day of Month, Day of Quarter). A 'Submit Now' button is present. Below the form, the 'View Completed Reports' section is shown, displaying a table of reports with columns: Action, Title, Job Name, Status, and Start Date. The 'Container Inventory Report' is listed with a status of 'Success' and a start date of '26/06/2024'.

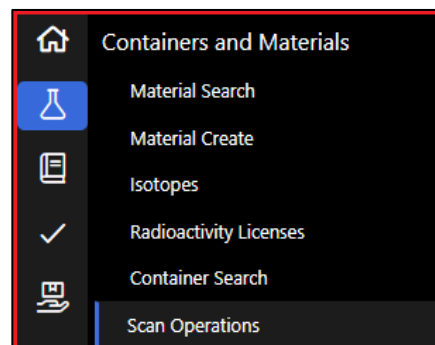
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### 3. Scan Operations

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.



Containers and Materials • Scan Operations

Scan



All Scans Here

Details

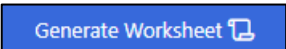
**Function** Check In

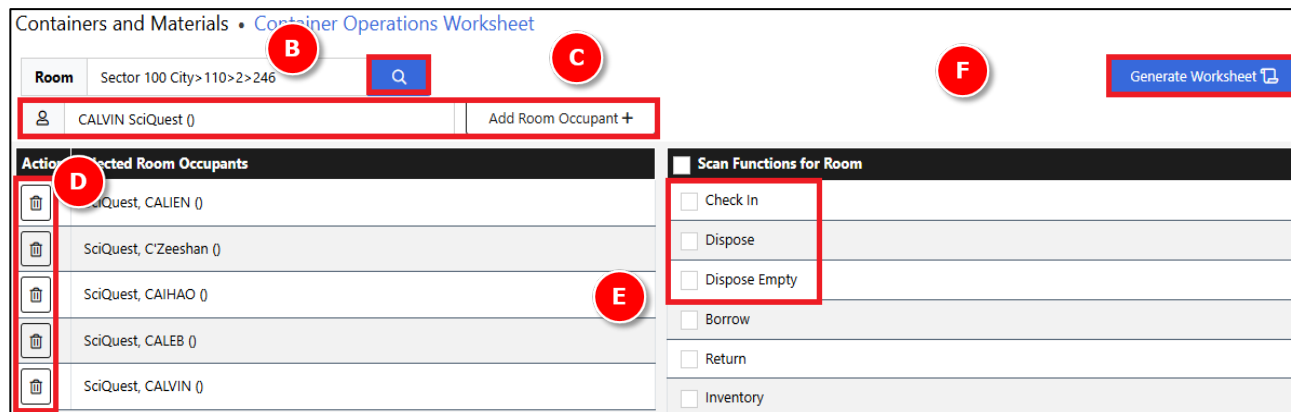
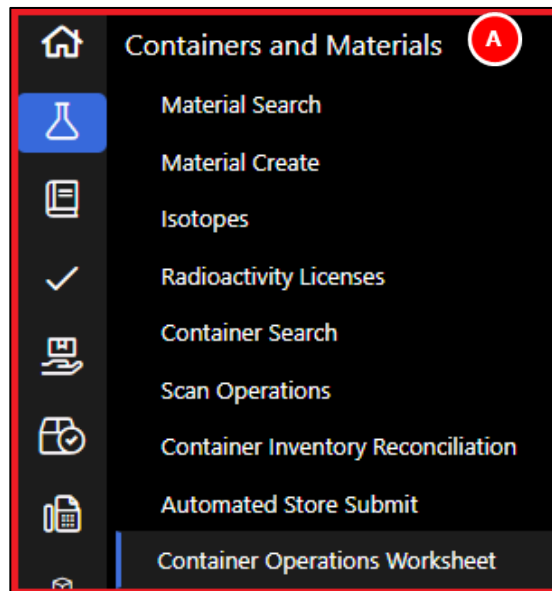
**To Location** Sector 100 City>110>2>212 SBS Unwanted Chemicals

**To Owner** SciQuest, C'Zeeshan

Containers								
		Bar Code	Label Name	Amount	Status	Location	Owner	
	Warning		TEST280620256	Ammonium carbonate, 500 g	500.0 G	AVAILABLE	Sector 100 City>110N>2>2001	SciQuest, CALIEN

#### 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](mailto:scitrack@auckland.ac.nz) for a sheet of sublocation barcodes for your area.
- C. Add "Room Occupants" who are the container owners. Start typing a name into the blank field, select the correct one, then click **Add Room 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  and a pdf will pop up or download, depending on your browser settings. Print out the barcode sheet.

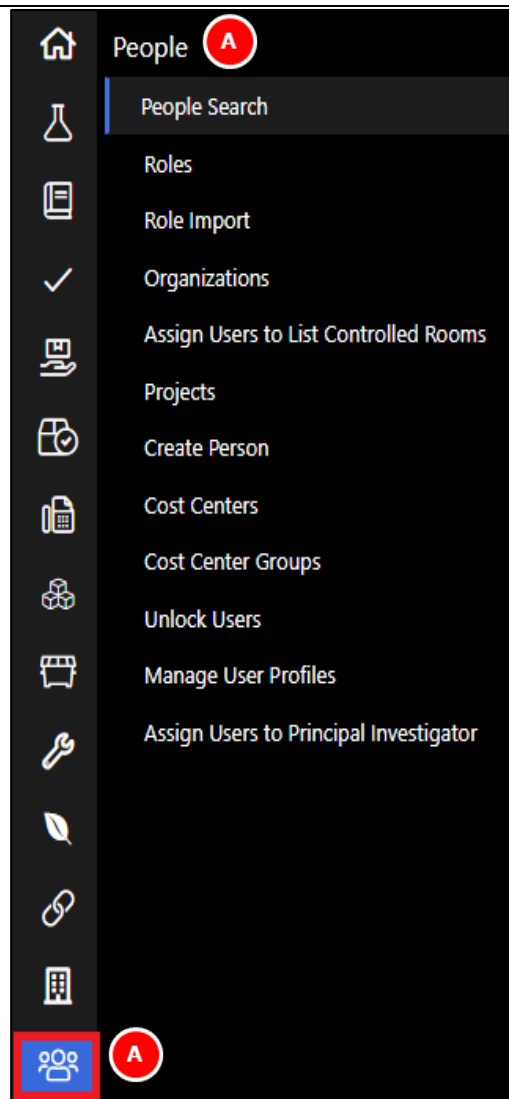


## SciTrack Quick Guide – 12. Advanced features (Version 3.1)

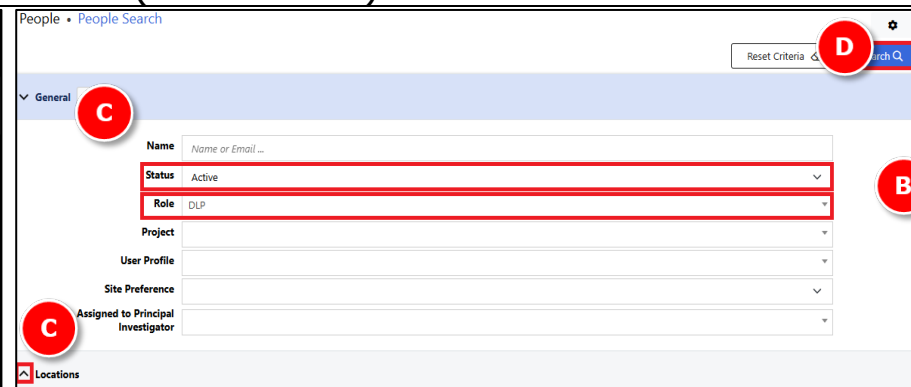
### 5. View SciTrack users (and DLP list)

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>Three Heads Icon (People)>People Search.
- B. To find DLPs in your area, choose the Role of DLP, and select Status as Active.
  - Note that the results include users that have not chosen a location yet.
- C. To choose a location to search, click the ^ symbol to expand the section. You can search by your Primary Location, Site, or you can manually select to search your Sector, a building, a floor, or a room by clicking the . The third screenshot shows how to choose to search a whole sector.
- D. Click Search
- E. Sort results by clicking any column header



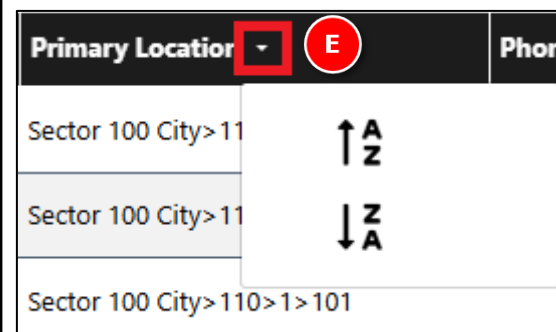
The sidebar menu shows the 'People' section expanded, with 'People Search' selected. Other options include Roles, Role Import, Organizations, Assign Users to List Controlled Rooms, Projects, Create Person, Cost Centers, Cost Center Groups, Unlock Users, Manage User Profiles, and Assign Users to Principal Investigator. The 'People' icon at the bottom is highlighted with a red box and labeled 'A'.



The 'People Search' filters section shows the following options: Name (Name or Email ...), Status (Active), Role (DLP), Project, User Profile, Site Preference, and Assigned to Principal Investigator. The 'Status' and 'Role' dropdowns are highlighted with red boxes and labeled 'B'. The 'Search' button is highlighted with a red box and labeled 'D'.



The 'Locations' section shows a list of locations under the 'Sector 100 City' header. The 'Sector 100 City (12)' location is selected with a red box and labeled 'C'. The 'Sub-locations' list includes 80-01 (1), 80-06 (2), DW-01 (1), DW-04 (1), and DW-08 (1).



The 'Primary Location' dropdown menu is open, showing a list of locations. The dropdown is highlighted with a red box and labeled 'E'. The list includes 'Sector 100 City> 11', 'Sector 100 City> 11', and 'Sector 100 City> 110> 1> 101'.