

13. Stocktake and bulk inventory transfer



Overview

This quick guide will show you how to stocktake your SciTrack items, and perform a location transfer of multiple items.

1. Prepare your inventory reconciliation spreadsheet
2. Optional – Perform the location transfers

Steps		Screenshots																																		
<p>1. Prepare inventory reconciliation spreadsheet</p> <p>A. Download the inventory reconciliation spreadsheet from the SciTrack website: https://www.auckland.ac.nz/scitrack-info</p> <p>B. There are two ways to record the stocktake data:</p> <table border="1"> <tr> <td>Type in</td> <td> <ul style="list-style-type: none"> Scan the container barcodes in column B Type in the location information The User ID is the UPI of the person performing the stocktake </td> </tr> <tr> <td>OR</td> <td></td> </tr> <tr> <td>Scan</td> <td> <ul style="list-style-type: none"> First, generate your user ID and room ID barcodes Scan the container barcodes in column B Scan the SciTrack sublocation barcode in column C (from the sticker on the sublocation). If the item has no sublocation, scan the room ID barcode from the generated worksheet. </td> </tr> </table> <p>C. Send the completed spreadsheet to scitrack@auckland.ac.nz or if you use the type-in spreadsheet, you can perform the transfers in SciTrack yourself as described in section 2 below.</p>		Type in	<ul style="list-style-type: none"> Scan the container barcodes in column B Type in the location information The User ID is the UPI of the person performing the stocktake 	OR		Scan	<ul style="list-style-type: none"> First, generate your user ID and room ID barcodes Scan the container barcodes in column B Scan the SciTrack sublocation barcode in column C (from the sticker on the sublocation). If the item has no sublocation, scan the room ID barcode from the generated worksheet. 	<p>Type-in Stocktake template</p> <p>➔ Scan container barcodes and type in the locations</p> <table border="1"> <thead> <tr> <th>Scan Container Bar Code</th> <th>Container Site</th> <th>Container Building</th> <th>Container Floor</th> <th>Container Room</th> <th>Sub-location</th> </tr> </thead> <tbody> <tr> <td>UOAC00012345</td> <td>Sector 300 City</td> <td>302</td> <td></td> <td>7 750A</td> <td>CC-01</td> </tr> <tr> <td>UOAC00012346</td> <td>Sector 300 City</td> <td>302</td> <td></td> <td>7 750A</td> <td>Bay-01>Shelf-02</td> </tr> </tbody> </table> <p><i>Type in spreadsheet example</i></p> <p>SCAN-only stocktake template</p> <p>➔ Use for a whole lab stocktake of chemicals where all sublocations have SciTrack barcode stickers.</p> <table border="1"> <thead> <tr> <th>Container Bar Code</th> <th>Container Location</th> </tr> </thead> <tbody> <tr> <td>UOAE000023296</td> <td>LP%Q608</td> </tr> <tr> <td>UOAE000023295</td> <td>LP%Q608</td> </tr> <tr> <td>UOAE000023294</td> <td>LP%Q205</td> </tr> <tr> <td>UOAE000023293</td> <td>LP%Q205</td> </tr> </tbody> </table> <p><i>Scan spreadsheet example</i></p>	Scan Container Bar Code	Container Site	Container Building	Container Floor	Container Room	Sub-location	UOAC00012345	Sector 300 City	302		7 750A	CC-01	UOAC00012346	Sector 300 City	302		7 750A	Bay-01>Shelf-02	Container Bar Code	Container Location	UOAE000023296	LP%Q608	UOAE000023295	LP%Q608	UOAE000023294	LP%Q205	UOAE000023293	LP%Q205
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2. Optional – Perform the location transfers

→ If you use the Type in spreadsheet, you can perform the transfers yourself.


- A. Click **Container Search**.
- B. Select search option **Paste**. Paste a list of barcodes to search.
- C. Check the New Search box to clear any previous search results.
- D. Click **Search**.
- E. Select All Containers checkbox
- F. Click **Operations** and choose **Transfer Location**. Alternatively choose **Transfer Owner/Location** to change owner and location.



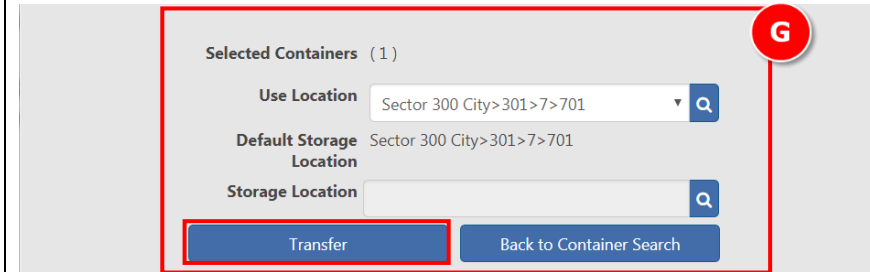
The screenshot shows the SciTrack interface for container operations. The top section is titled 'Container Search' and features a search icon (A). Below this, there are navigation tabs for 'Container Operations' and 'Container Search'. A search bar contains the text 'Please paste a maximum of 9,999 bar codes into the area below.' To the right of the search bar are buttons for 'Advanced Search', 'Quick Search', 'Import', 'Paste' (B), and 'Scan'. Below the search bar are two buttons: 'New Search' (C) and 'Search' (D). The bottom section shows the 'SciTrack Research Material Manager' interface. It includes a navigation bar with 'Container Operations' and 'Container Search'. Below this, there is a checkbox for 'All Containers (814)' (E) and a dropdown menu for 'Operations' (F). The bottom of the screenshot shows a table with columns for 'Action' and 'Bar Code', with a row containing a bar code 'UOAM000035101'.

G. Transfer Location window


i. Change location

- Select location from drop-down list **OR**
- If required location is not available, use location button  to select the location (**Leave the Storage Location blank**).


ii. Click **Transfer**.



Selected Containers (1)

Use Location Sector 300 City>301>7>701 

Default Storage Location Sector 300 City>301>7>701

Storage Location 


Transfer **Back to Container Search**

H. OR Transfer Owner/Location window

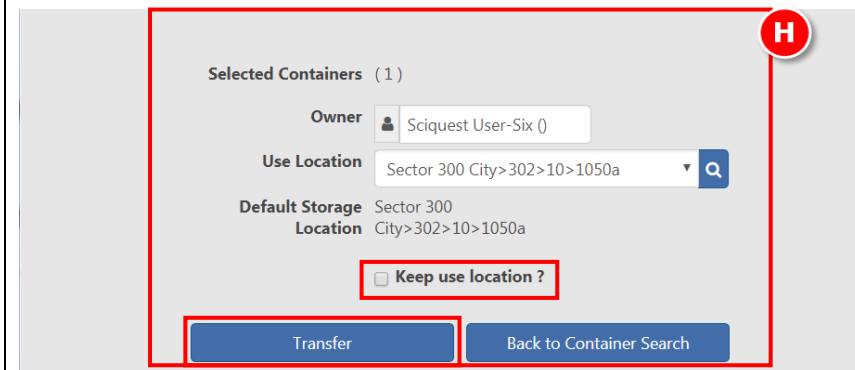
i. Change owner

- Enter first name **or** surname in **Owner** field.
- Click on the desired user's name


ii. Change location (optional- check the Keep use location button if you don't want to change the item's location)


- Select location from drop-down list **OR**
- If required location is not available, use location button  to select the location.

iii. Click **Transfer**.



Selected Containers (1)

Owner  Sciquest User-Six ()

Use Location Sector 300 City>302>10>1050a 

Default Storage Location Sector 300 City>302>10>1050a

Keep use location ?

Transfer **Back to Container Search**