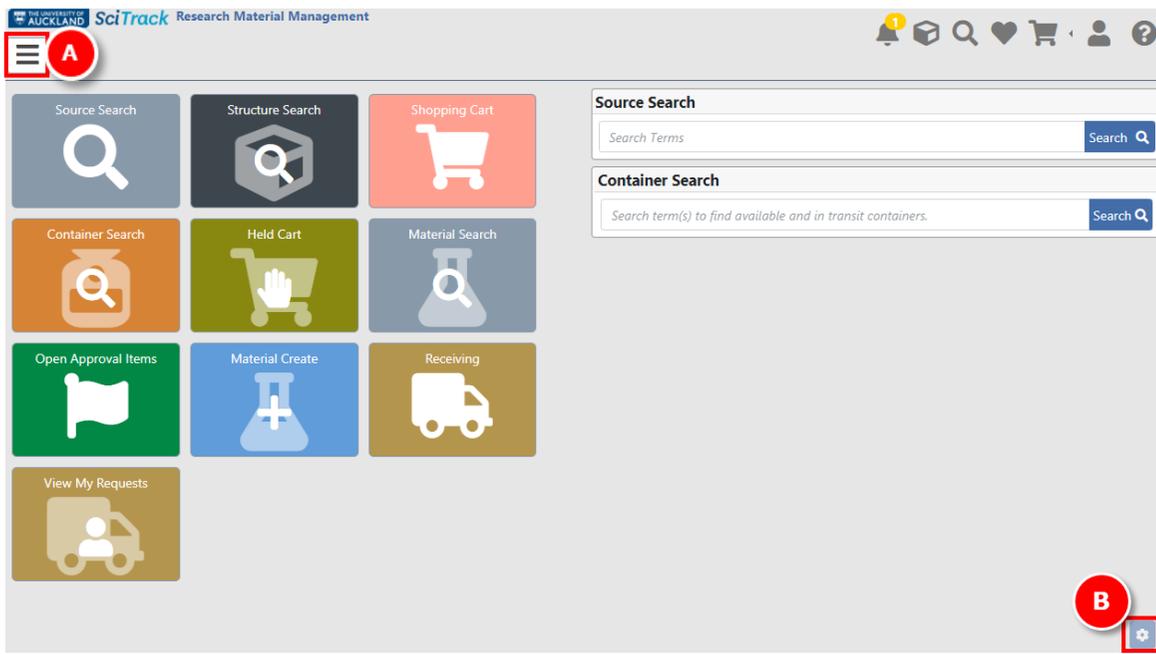


## 12. Advanced features

### 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. 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 <b>2. Configure Preferences</b> 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, there is a grid of feature tiles. A red circle labeled 'A' points to the menu icon in the top left 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 boxes for Source Search and Container Search. A red circle labeled 'B' points to the settings icon in the bottom right corner.</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. 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

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 with several key elements highlighted:

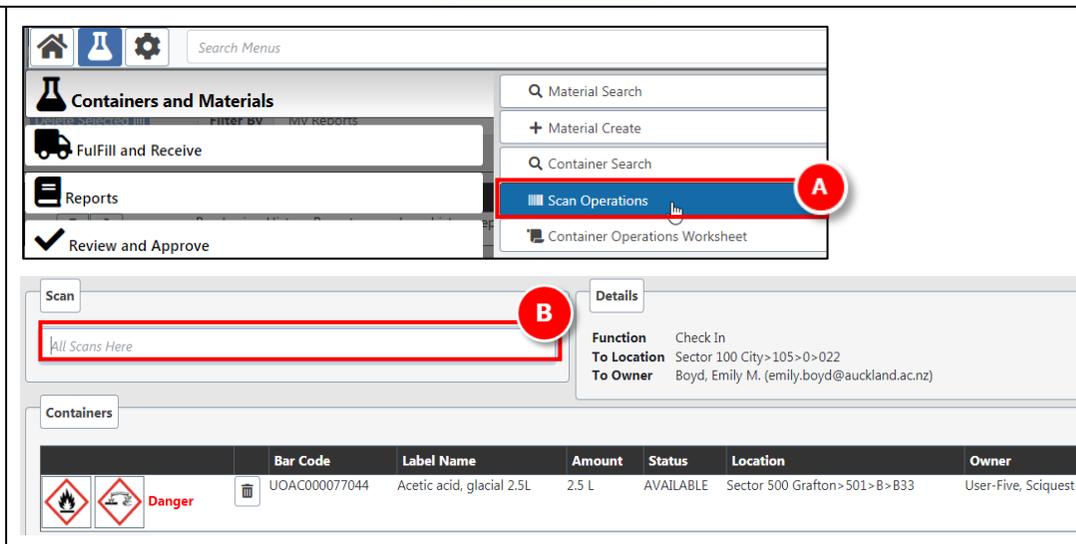
- A:** The "Schedule Report" button in the top navigation menu.
- B:** The "Custom Reports" section containing various report options like "Container Expiration Report", "DLP Approval", and "Stockroom Journal Report".
- C:** The "Run Criteria" dropdown menu with options: "Now", "Later", "Day of Week", "Day of Month", and "Day of Quarter".
- D:** The "Emails" input field where an email address is entered.
- E:** The "Emails" input field (repeated for emphasis).
- F:** The "Submit Now" button.
- G:** The download icon in the "Action" column of the report list at the bottom.

### 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.



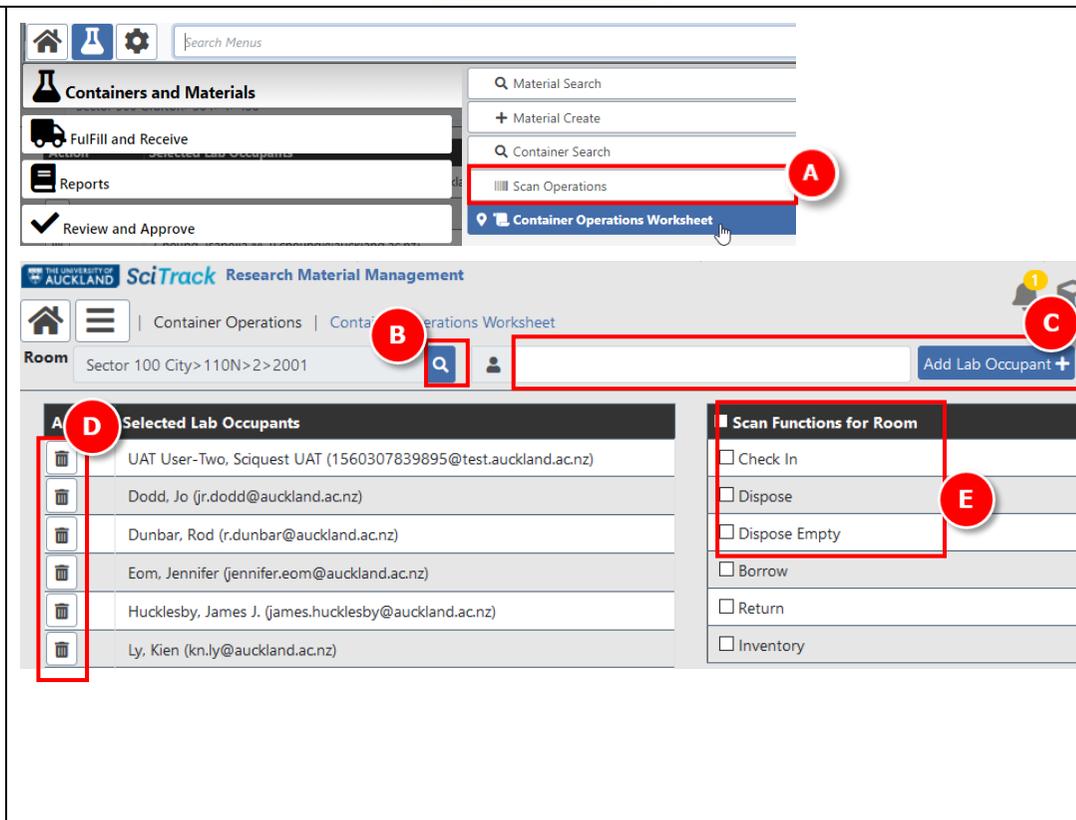
The screenshot shows the SciTrack interface with the following elements:

- Navigation Menu:** Home, Containers and Materials, FulFill and Receive, Reports, Review and Approve.
- Search and Action Panel:** Material Search, Material Create, Container Search, Scan Operations (highlighted with red box A), Container Operations Worksheet.
- Scan Section:** Scan (highlighted with red box B), All Scans Here.
- Details Panel:**
  - Function: Check In
  - To Location: Sector 100 City>105>0>022
  - To Owner: Boyd, Emily M. (emily.boyd@auckland.ac.nz)
- Containers Table:**

	Bar Code	Label Name	Amount	Status	Location	Owner
  <b>Danger</b>	UOAC000077044	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](mailto: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.

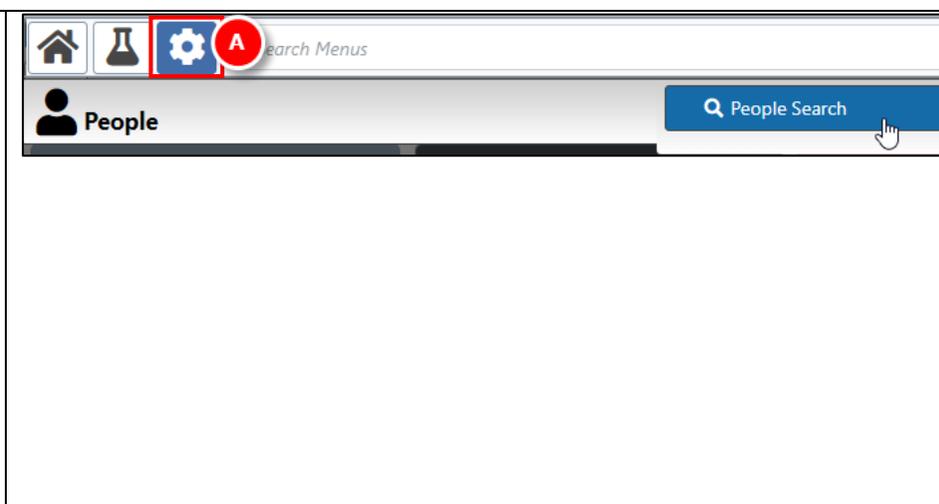


The screenshot shows the SciTrack interface for generating a barcode worksheet. The top navigation bar includes 'Containers and Materials', 'Fulfill and Receive', 'Reports', and 'Review and Approve'. A search menu is available. The main content area is titled 'Container Operations Worksheet' and shows a room selection dropdown (Sector 100 City>110N>2>2001) and an 'Add Lab Occupant +' button. Below this is a table of 'Selected Lab Occupants' with a delete icon (D) for each row. To the right is a 'Scan Functions for Room' section with checkboxes for 'Check In', 'Dispose', 'Dispose Empty', 'Borrow', 'Return', and 'Inventory' (E). A 'Generate Worksheet' button is at the bottom right.

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

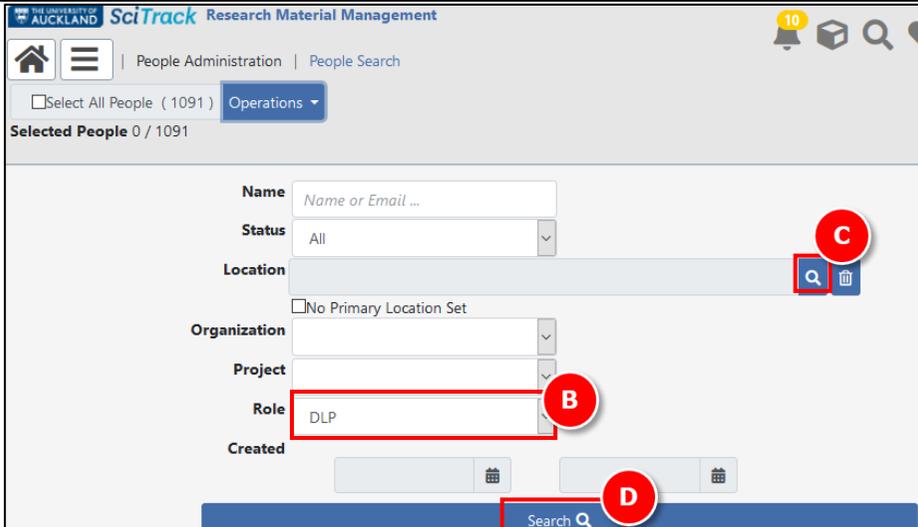
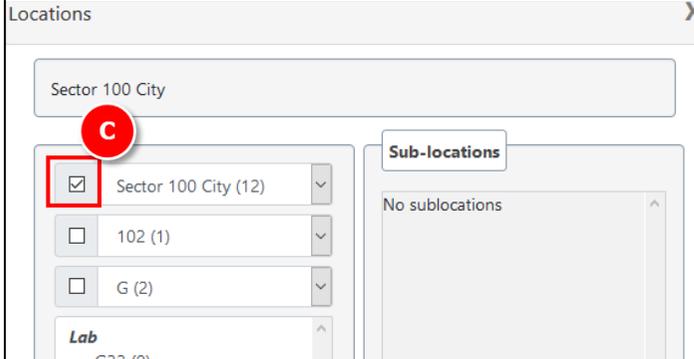
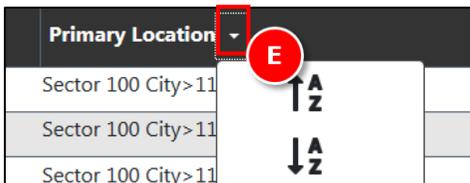
People Search can be used to find a list of SciTrack users. This might be helpful to find out who is a DLP in your area.

- A. Click Menu>Gear icon>People>People Search.
- B. To find DLPs in your area, choose the Role of DLP, 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 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.



The screenshot shows the SciTrack interface for viewing users. The top navigation bar includes a gear icon (A) and a search menu. The main content area is titled 'People' and has a 'People Search' button with a magnifying glass icon.

- D. Click Search
- E. Sort results by clicking any column header

Primary Location
Sector 100 City>11
Sector 100 City>11
Sector 100 City>11