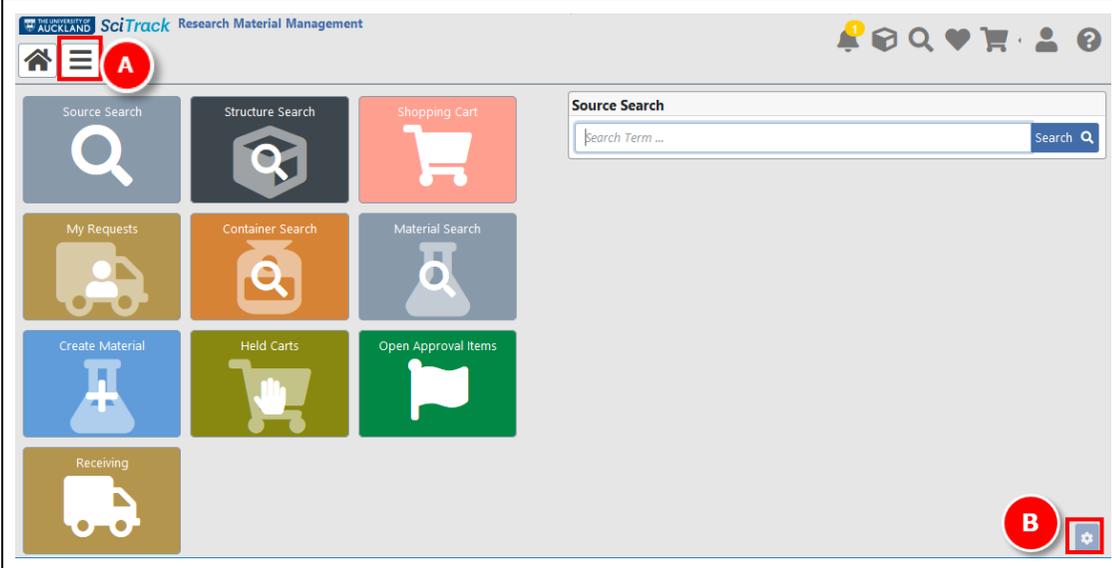


12. Advanced features

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>	

2. Generate reports

- A. Click Menu>Searching and Shopping>Schedule/Run 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>Searching and Shopping>My Reports and click the download button 

Here are some reports that you may find useful.

Custom Report	Description
Containers of listed materials	An inventory report that shows all items belonging to one or more hazard lists (including RB, GMO, and hazardous chemicals) for an entire Sector.
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.
Containers of listed materials	An inventory report that shows all items belonging to one or more hazard lists (including RB, GMO, and hazardous chemicals) for an entire Sector.

The screenshot illustrates the steps to generate a report in the SciTrack system. It shows the navigation path from the main menu to the 'Schedule/Run Report' page. The 'Custom Reports' section lists various report types, including 'ReceivingFileReport-PS'. The 'Run Criteria' section allows users to select the report type, specify the job name, output type (CSV), and email address (E). Users can choose to run the report 'Now' (C) or 'Later', and select the frequency (Day of Week, Day of Month, or Day of Quarter). The 'Submit Now' button (F) is highlighted. The 'My Reports' section (G) shows a list of generated reports, including 'Receiving File Report-PS', with a download icon.

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>Container Operations>**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 'Searching and Shopping' and 'Container Operations' menus. In the 'Container Operations' menu, 'Scan Operations' is highlighted with a red box and a circled 'A'. Below the menus, there is a 'Scan' input field with a placeholder 'All Scans Here'. To the right, a 'Details' section shows information for a container: Function: Check In, To Location: Sector 100 City>105>0>022, To Owner: Boyd, Emily M. (emily.boyd@auckland.ac.nz). Below this is a 'Containers' table with a red box around the header and a circled 'B' over the first row.

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> Container Operations>**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.

The screenshot shows the 'Container Operations Worksheet' page. At the top, 'Container Operations Worksheet' is highlighted in the menu with a red box and a circled 'A'. Below the menu, the 'Room' dropdown is set to 'Sector 100 City>110N>2>2001'. A search field for lab occupants is highlighted with a red box and a circled 'B'. Below this is a table of 'Selected Lab Occupants' with a red box around the first row and a circled 'D' over the delete icon. To the right, a 'Scan Functions for Room' section has a red box around the 'Check In', 'Dispose', and 'Dispose Empty' options, with a circled 'E' over the 'Check In' checkbox.

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

5. View SciTrack users and find DLPs

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>People Administration>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 screenshot shows how to choose to search a whole sector.
- D. Click Search
- E. Sort results by clicking any column header

The screenshot displays the SciTrack Research Material Management interface. The top navigation bar includes 'People Administration' and 'People Search'. The 'Selected People' count is 0 / 1091. The search filters are as follows:

- Name: Name or Email ...
- Status: All
- Location: No Primary Location Set (with a magnifying glass icon labeled C)
- Organization: (empty)
- Project: (empty)
- Role: DLP (highlighted with a red box and labeled B)
- Created: (empty)

The search button is labeled D. Below the filters, the 'Locations' section shows a list of locations:

- Sector 100 City (12) (checked, highlighted with a red box and labeled C)
- 102 (1)
- G (2)
- Lab G33 (0)

The 'Sub-locations' section shows 'No sublocations'. Below this, a dropdown menu for 'Primary Location' is open, showing a list of location paths and sorting options (↑ A Z and ↓ A Z). The dropdown is labeled E.

Primary Location

- Sector 100 City>11
- Sector 100 City>11
- Sector 100 City>11
- Sector 100 City>110N>4>4001
- Sector 100 City>105>0>022