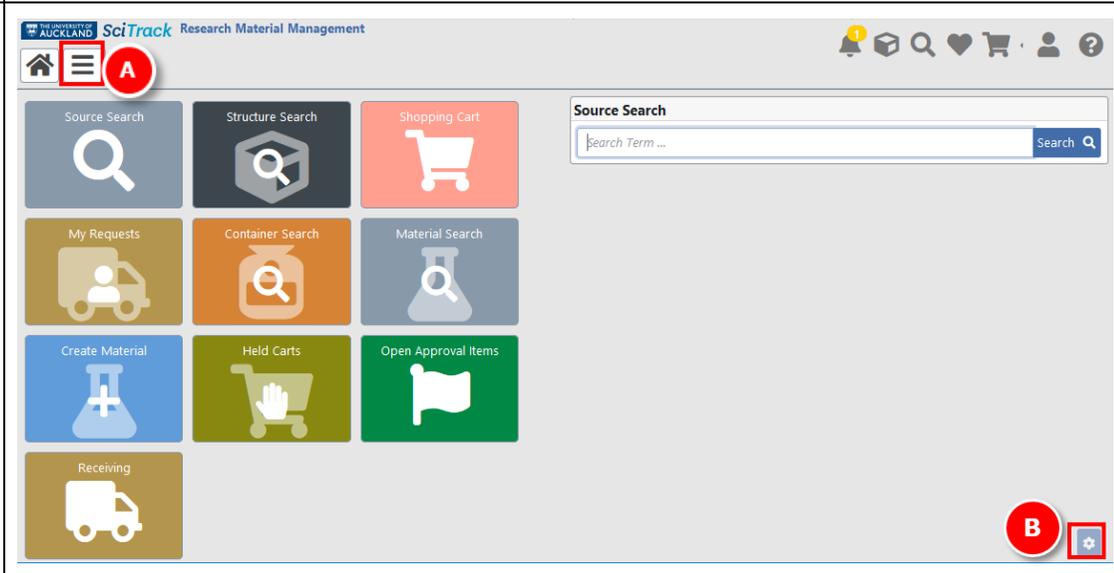


## 12. Advanced features

### 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 left, there is a home icon and a menu icon (three horizontal lines) highlighted with a red box and labeled 'A'. The main area contains a grid of feature tiles: Source Search (magnifying glass), Structure Search (hexagon with magnifying glass), Shopping Cart (shopping cart), My Requests (person with cart), Container Search (box with magnifying glass), Material Search (flask with magnifying glass), Create Material (flask with plus sign), Held Carts (shopping cart with hand), Open Approval Items (flag), and Receiving (truck). On the right side, there is a 'Source Search' input field with a search button. In the bottom right corner, there is a settings icon (gear) highlighted with a red box and labeled 'B'. The top right corner contains notification, search, and user icons.</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
<b>Containers of listed materials</b>	An inventory report that shows all items belonging to one or more hazard lists (including RB, GMO, and hazardous chemicals) for an entire Sector.
<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.
<b>Containers of listed materials</b>	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 for each 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>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' and a circled 'B' next to it. To the right, the 'Details' section shows: 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 circled 'B' over the header 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](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 'Container Operations Worksheet' page. At the top, 'Container Operations Worksheet' is highlighted in the menu with a circled 'A'. Below the header, the 'Room' is set to 'Sector 100 City>110N>2>2001'. A search field for lab occupants has a circled 'B' over the search icon and a circled 'C' over the 'Add Lab Occupant +' button. Below this is a table of 'Selected Lab Occupants' with a circled 'D' over the first row, and a 'Scan Functions for Room' table 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 'THE UNIVERSITY OF AUCKLAND', 'SciTrack Research Material Management', and a notification bell with '10'. The main header shows 'People Administration | People Search' and a 'Select All People (1091)' button. Below this, a 'Selected People 0 / 1091' indicator is present. 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)

A 'Search' button with a magnifying glass icon is labeled 'D'. Below the filters, the 'Locations' section is expanded, showing 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 is empty, showing 'No sublocations'. At the bottom, a 'Primary Location' dropdown menu is open, showing a list of location paths and sorting options:

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

The dropdown menu also includes sorting icons: an upward arrow with 'A Z' and a downward arrow with 'A Z', labeled 'E'.