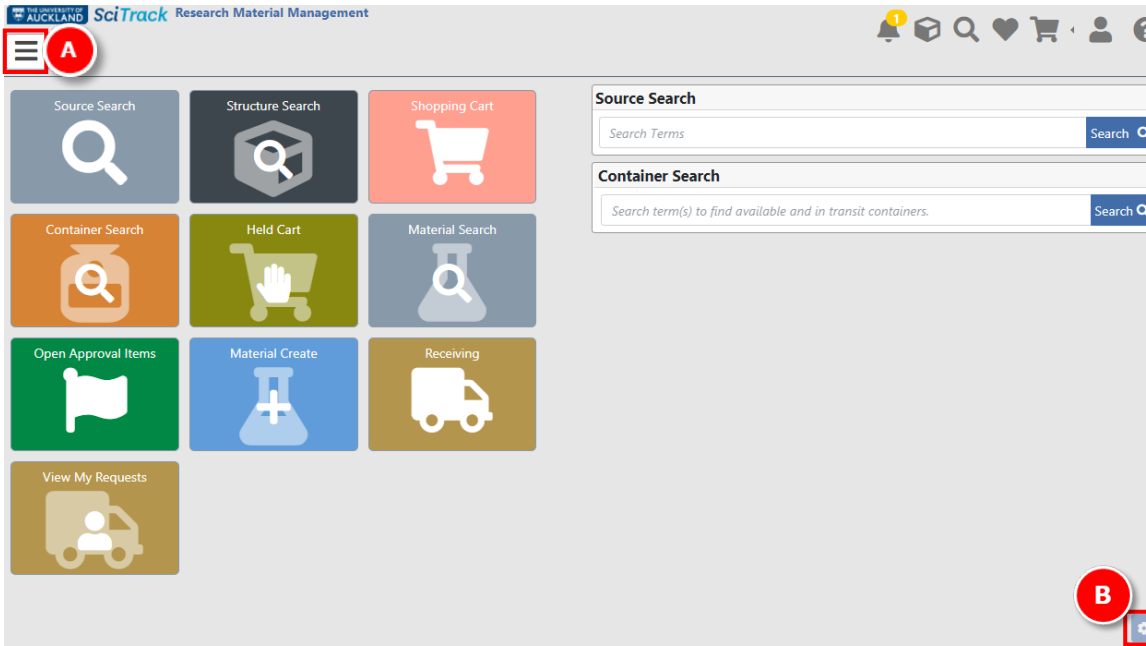


12. Advanced features

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>	 <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, a grid of functional tiles is visible. A red circle labeled 'A' highlights the menu icon in the top left corner. A red circle labeled 'B' highlights the settings icon in the bottom right 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.</p>

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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 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

Here are some reports that you may find useful.

Custom Report	Description
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.

The screenshot illustrates the SciTrack interface for generating reports. It shows the navigation menu, the 'Custom Reports' section with various report options, the 'Run Criteria' form for selecting the report type and frequency, the 'Emails' input field, the 'Submit Now' button, and the 'Report Criteria' section. The bottom part of the screenshot shows a list of reports with a 'Download' icon highlighted.

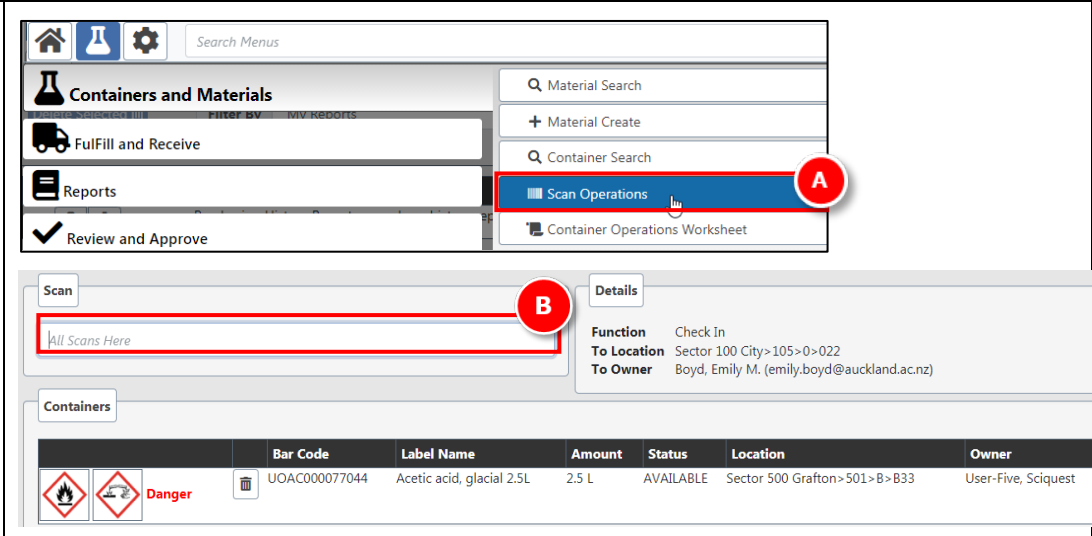
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3. Scan Operations

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!

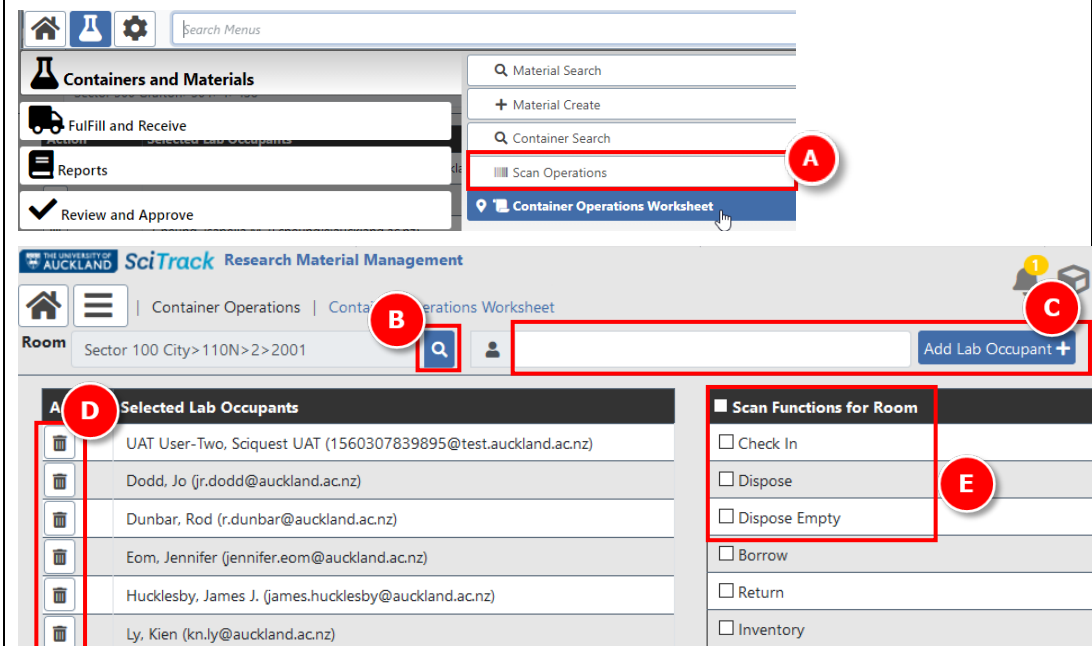
- A. Click Menu>Containers and Materials>**Scan Operations**.
- B. Make sure the cursor is in the Scan field
- C. Scan **Check In** barcode.
- D. Scan barcode of item's Principal Investigator owner.
- E. Scan barcode of item's new location or sub-location.
- F. Scan SciTrack barcode on the container(s)
- G. Scan **Done** barcode.









	Bar Code	Label Name	Amount	Status	Location	Owner
  Danger	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> 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 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.



	Selected Lab Occupants
	UAT User-Two, Sciquest UAT (1560307839895@test.auckland.ac.nz)
	Dodd, Jo (jr.dodd@auckland.ac.nz)
	Dunbar, Rod (r.dunbar@auckland.ac.nz)
	Eom, Jennifer (jennifer.eom@auckland.ac.nz)
	Hucklesby, James J. (james.hucklesby@auckland.ac.nz)
	Ly, Kien (kn.ly@auckland.ac.nz)

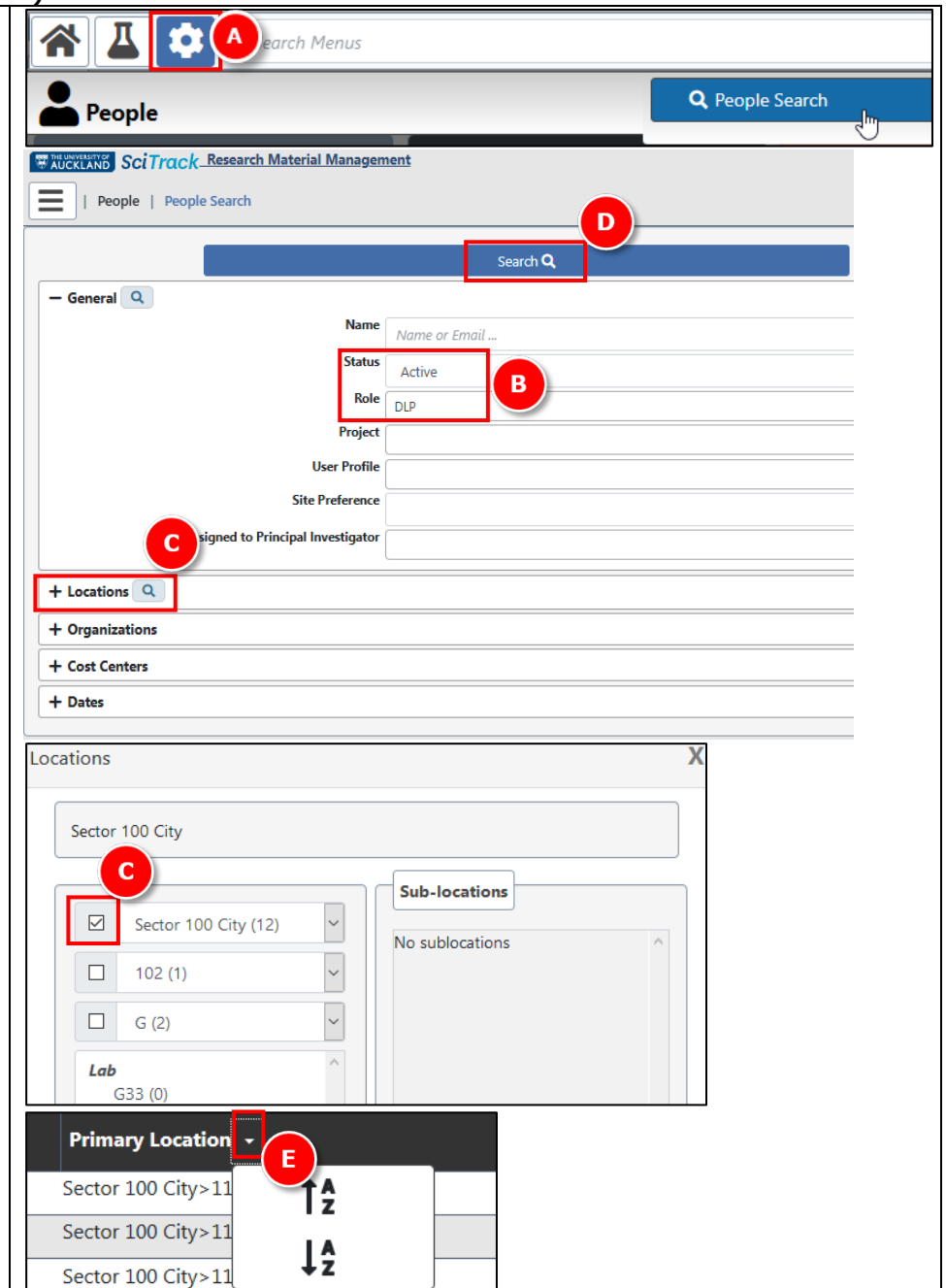
Scan Functions for Room	
<input type="checkbox"/>	Check In
<input type="checkbox"/>	Dispose
<input type="checkbox"/>	Dispose Empty
<input type="checkbox"/>	Borrow
<input type="checkbox"/>	Return
<input type="checkbox"/>	Inventory

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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. You can search by your Primary Location, Site, or you can manually select to search your Sector, a building, a floor, or a room. The third screenshot shows how to choose to search a whole sector.
- D. Click Search
- E. Sort results by clicking any column header



The screenshot shows the SciTrack interface for viewing users. The top navigation bar includes a home icon, a flask icon, a gear icon (labeled A), and a search menu. Below this is a 'People' section with a 'People Search' button (labeled D). The main content area is titled 'SciTrack - Research Material Management' and contains a search bar (labeled D) and a filter section. The filter section includes fields for Name, Status (set to Active, labeled B), Role (set to DLP, labeled B), Project, User Profile, Site Preference, and a checkbox for 'Signed to Principal Investigator'. Below the filter section are expandable sections for '+ Locations' (labeled C), '+ Organizations', '+ Cost Centers', and '+ Dates'. The 'Locations' section is expanded, showing a search bar for 'Sector 100 City' and a list of locations with checkboxes: 'Sector 100 City (12)' (checked, labeled C), '102 (1)', and 'G (2)'. Below this is a 'Lab' section with 'G33 (0)'. At the bottom, a 'Primary Location' dropdown menu is open, showing a list of locations and a sort menu with up/down arrows and 'A Z' labels (labeled E).