SciList
User Guide

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Any software inevitably evolves and this documentation may not always represent all the features available, or the screen shots may look different to actual.

You may check www.carobcom.com for a .pdf version of this document that should be current.

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Chapter 1

Overview

Installation

SciList runs a standard Windows installation. If the setup doesn't start automatically, run Setup.exe from the CD.

SciList installs by default in C:\SciList, but you may change this location if you wish.

Windows 7 and Vista will not allow changes to be made to any file in the Program Files folders or the Windows folders. SciList is a database program that requires files to be changed constantly.

For Win 7 and Vista, do not install SciList into the Program Files folder. Installation to C:\SciList is recommended.

The installation also creates a desktop icon and a program menu option but makes no changes to the registry.

To copy SciList to another computer or to a network, simply copy the SciList folder. You then only need to place a shortcut to SciList.exe for it to be fully functioning.

We suggest when starting with SciList, install to your own C: drive, then later copy the folder to the network if others require access to the program.

SciList is installed without any password control. This means all users have full access to all parts of the program. If you put SciList on a network or otherwise require password activation, copy the file named dssw2.tps from the control sub-folder into the SciList folder. If this file is present, then passwords are activated. See Chapter 7 for details.

Registration Code

Every SciList requires a unique registration code. Without the code, SciList will operate for around a month and a half. Once CaRob receives payment we fax or email the code to the contact person.

Enter the registration code from the File menu

What does SciList do?

SciList is a school science laboratory inventory management, stock taking and re-ordering system. It is not limited to science applications. It developed as a science based system, but it suits any general purpose inventory management need.

SciList provides a systematic approach to the management of your resources, with a systematic data base and integrated procedures for stocktake and orders..

The program has four major functions.

1. Build a database listing your equipment, consumable items and chemicals; describe and identify them, assign stock levels and locations, and record purchase details.

2. Report on the database. Generate listings such as: items in a location; item groupings (categories and disciplines assigned by you); dangerous goods and hazardous substances register; and keyword searches.

3. Use the database to manage your stocktake and report shortfalls in stock levels, which may then be used to...

4. Generate purchase orders by supplier. After ordering through SciList, the supplier, product code and unit price are automatically added to the item record and used in future orders. Full or partial receipt of orders is recorded and a back order report can be run. Invoices can be recorded. Expenditure may be reported.

The database is searchable by:

• Keyword
• Item name
• Category and Discipline
• Location

You can assign levels of access to the database by different users, e.g. "Admin" for the Lab tech, and "User" for teachers. Various functions of the database can be enabled or disabled according to user access level. There is also facility to create a non-public, non-searchable list of equipment.

5. Existing data may be imported if you currently record equipment or chemicals in another electronic form such as a spreadsheet.

The Structure of SciList

Main data and relationships

```
Master Item ────────────► Stock
    │      \                an item in a location
    │       \                   │
    ▼        \                  ▼
Category(ies) \            Sub-Location
    │          \
    ▼           \
Discipline(s)    ▼
             Purchases
                 │
                 ▼
             Suppliers
```
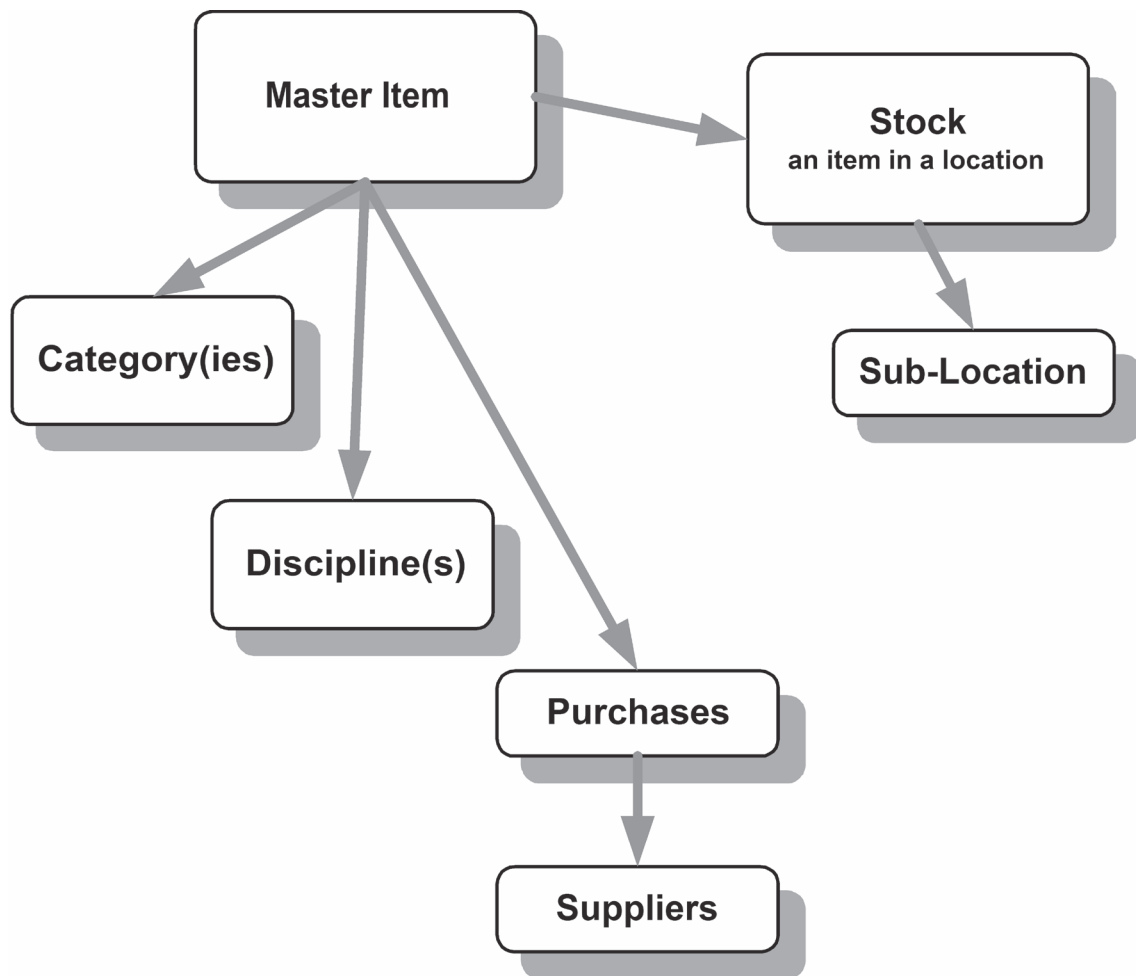
You may use SciList at different levels:

Master Items must hold details of all items that are in stock and can hold details of items that could potentially be in your stock.

Stock Items are items from the master list that have been assigned a quantity in a specific location.

Adding sub-locations to stock will help staff to find items and help with stocktaking.

Assigning a category (e.g. aquarium equipment or glassware) enables convenient grouping of equipment by their function, even though they may be in different disciplines or locations.

Assigning a discipline (e.g. physics) is another way of grouping stock.

Purchase histories are useful when re-ordering as product codes, suppliers, and prices are able to be looked up and are transferred onto new orders.

SciList Menus

All functions can be accessed from the drop down menus, below.
Please note that menus can change over time as SciList evolves.
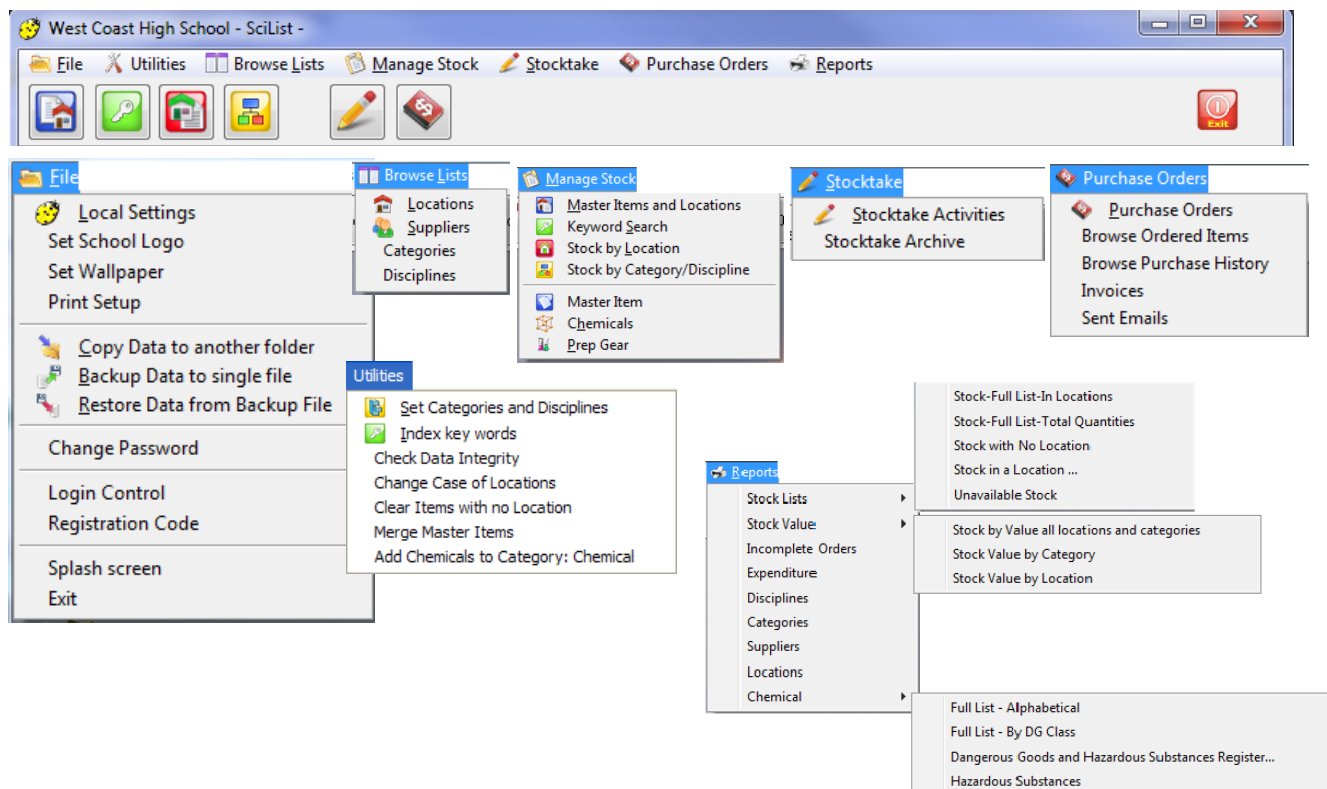
Updating Stock and their
Locations; Categorising, and
Finding Stock
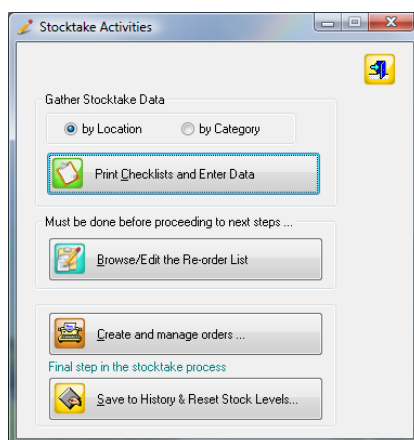
Stocktake Activities
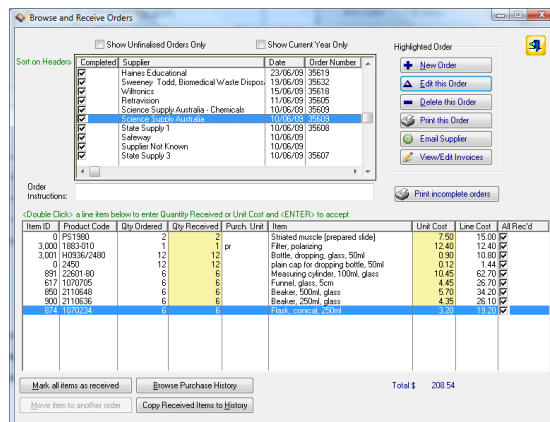
Purchase Orders

SciList Overview

Browse > Master Items and Stock

All items that are, or may be, in stock are listed as Master Items in the left hand table. The right hand table shows items that are actually in stock with their locations and quantities.

An item in stock is indicated with the tick in the left hand column.

View/Edit Master Items and Stock

Locate by Item: 1351 master items in 1746 locations

| Item	Location	Sub-Location	Full Stock	Actual	Unavail
Melting point tube	Compactus	8-3	3	3	0
Mercury collector	Chem Store	B10	0	1	0
Mercury spill apparatus	Chem Store	corr.	2	2	0
Meter, AC current	Physics Store	02	2	2	0
Meter, high current, AC-DC, 0-25 amp.	Physics Store	02	4	4	0
Metronome	Physics Store	02	0	1	0
Microbiology [kit]	Junior Science Store	09	1	1	0
Micrometer, screw gauge, metric, to 25mm	Physics Store	02	5	5	0
Microscope lens, oil immersion objective	Compactus	7-3	1	1	0
Microscope slide cabinet, 100slide capacity	Junior Science Store	24	2	2	0
Microscope slide, cavity	Junior Science Store	24	3	2	0
Microscope slide, cavity	Compactus	3-3	0	1	0
Microscope slide, plain glass	Junior Science Store	24	5	1	0
Microscope slide, plain glass	Compactus	3-4	0	4	0
Microscope slides, prepared, animal [kit]	Junior Science Store	24	1	1	0
Microscope slides, prepared, junior [kit]	Junior Science Store	24	1	1	0
Microscope slides, prepared, plant & animal [kit]	Junior Science Store	24	1	1	0
Microscope slides, prepared, plant [kit]	Junior Science Store	24	1	1	0
Microscope slides, prepared, VCE [kit]	Compactus	7-3	1	1	0
Microscope, binocular, senior	Junior Science Store	24	1	1	0
Microscope, computer	Compactus	4-1	1	1	0
Microscope, monocular, intermediate	Junior Science Store	19	12	12	0
Microscope, monocular, junior	Junior Science Store	18	15	15	0
Microscope, monocular, senior	Junior Science Store	23	12	12	0
Microscope, stereo, Bios	Junior Science Store	Bench	1	2	0
Microscope, stereo, Griffin	Junior Science Store	Bench	2	2	0
Microscope, stereo, Kinei	Junior Science Store	Bench	1	1	0
Microscopes, stereo, HED-Deluxe	Junior Science Store	Bench	9	9	0
Microscopy [kit]	Junior Science Store	24	14	14	0
Milk carton	Biology Store	08	0	1	0

Microscope, computer
Item Description

Interfaces with computer for projection

Stock Comment

Edit Master Items
[+ Insert] [△ Change] [— Delete] [Set Categories and Disciplines]
[View Purchase History] [Index Keywords]

Edit Stock (Locations)
[+ Insert] [△ Edit] [— Delete]

Window may be resized vertically

Update Master Item...

Record will be Changed   [✔ OK] [✗ Cancel]

Item: Microscope, computer

(50 characters max)

General

Description: Interfaces with computer for projection

Image Filename: computer microscope.jpg
in Images Fol

Unit: item

Total Ideal Qty: 1

Item Value: 270.00   This is updated automatical
Otherwise, enter it yourself

☐ Is Chemical   Check this if the item is a

Master item details (above)
Contains general information about the item. It is possible to store and display an image for an item.

Stock details

Has quantities and status of that Master Item in specific locations

Update Stock Item...

Item: Microscope, computer   [...] [✔ OK]
[✗ Cancel]

Location
Room: Compactus
Shelf: 4-1   If numeric type "01", ... "09", "10" etc

Ideal Quantity: 1

Note:
Quantities apply to above location only.

Stock Take Quantity:
1
(Including Temporarily Unavailable)

Temporarily
Unavailable Qty: 0
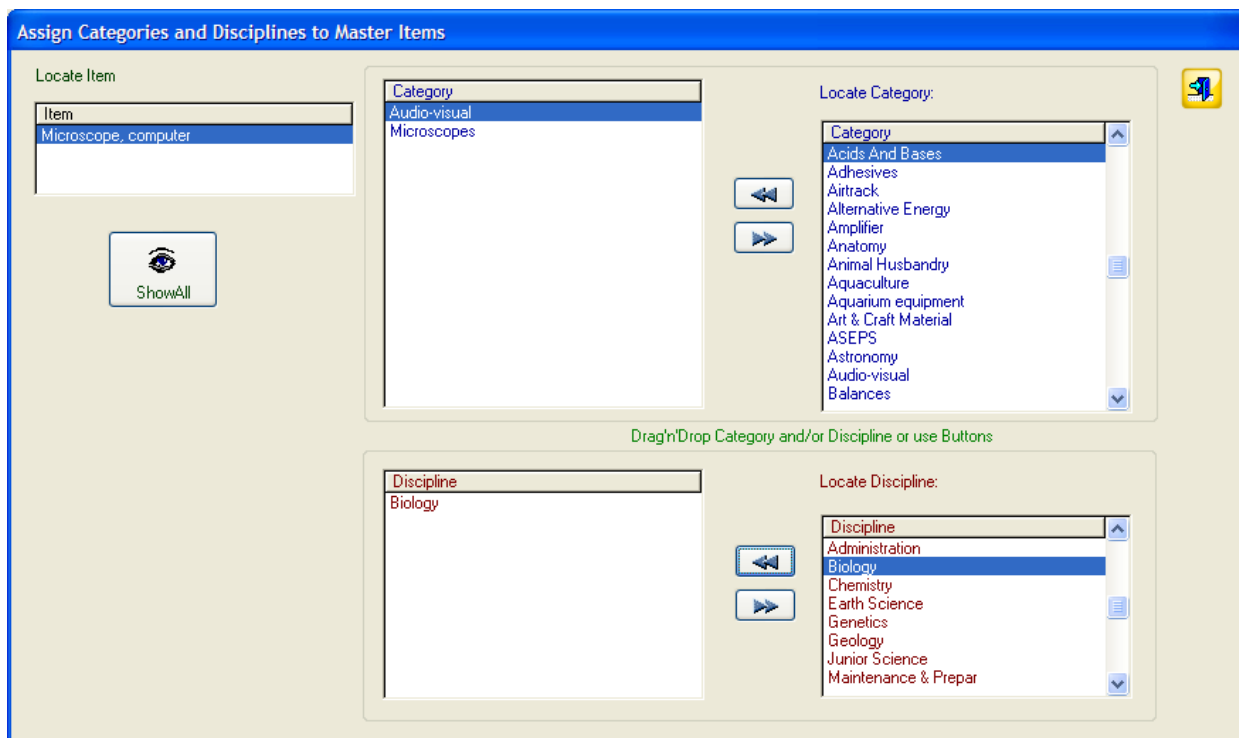
Comment:

Record will be Changed

Setting Categories and Disciplines for Master Items
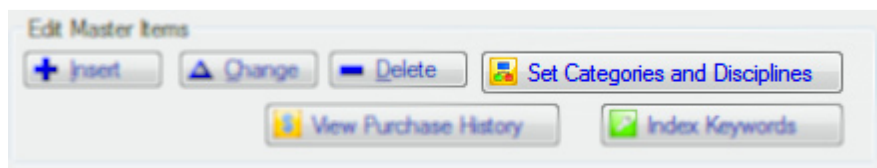
Clicking on **Set Categories and Disciplines** allows you to associate a master item with a category or subset of items and a teaching discipline. Both are optional.

A **Category** allows the grouping of items that may be different but are used together in some way, e.g. Microscopes, their slides, lamps, and any poster on microscopes.

Two categories are made automatically by SciList
- Consumable
- Chemical - if chemicals are imported or if the utility 'Add Chemicals to Category Chemical' is used.

A **Discipline** allows the grouping of items according to their usefulness to subjects and levels taught, e.g. *Biology, Physics, Year 12.*

Items can belong to multiple categories and disciplines.

These associations are useful for locating stock for class use and for stocktakes.

Setting your Organisation Details

File > Local Settings

Set all of your contact Details here

The contact details are printed on orders.

Note the ability to auto generate order numbers with an optional prefix.

For email capability, tick Activate Email and fill in the settings on the Email Setup tab.

You may need to ask your network person about the settings.

The chemical tab allows you to say whether you are using SciList to record chemicals and if so, if you are using the NSW coding format.

Locating Stock

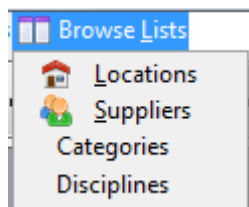There are several ways of locating stock items:

- Search by key word

- Filter by location

- Filter by Category and/or Discipline

(See chapter 3 for detail)

Related LookUp Tables

From the Browse Lists Menu
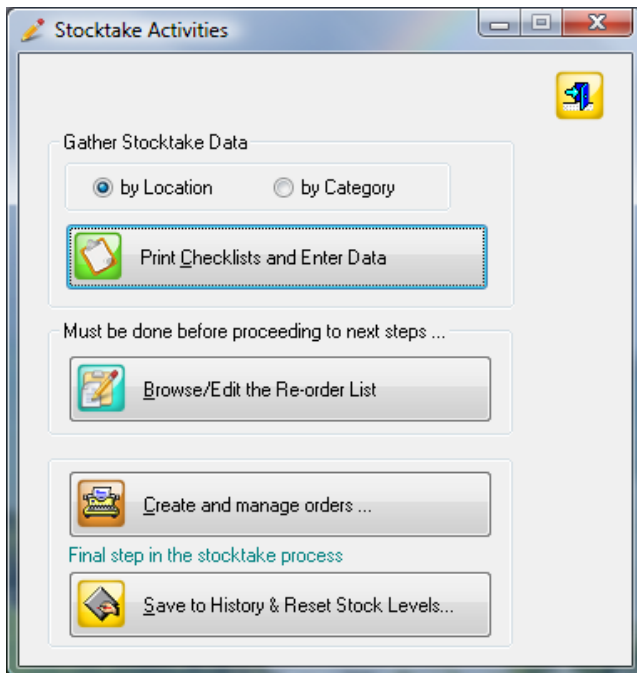
You will maintain these lists to suit your own requirements

Locations, Categories and Disciplines - associated with Stock Items

Suppliers - required when Orders are to be made

Stocktake Activities

(Detailed in Chapter 3)

You are guided through the stocktaking process from this window.

The process comprises these steps:

Print stocktake checklists either by Category or by Location, and use them to record your counts.

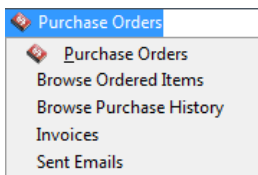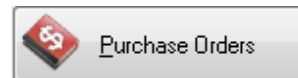Enter the stocktake counts into SciList

View and edit all items that are under-stocked and may need to be re-ordered.

Create and edit orders based on the re-order list. After orders are received, mark off received items.
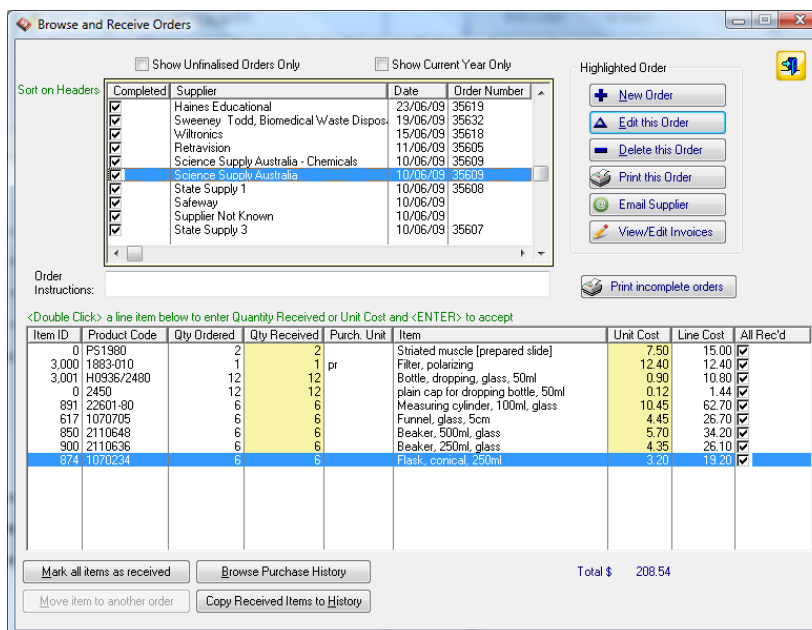
Save stocktake counts to history and reset stock levels based on the reordered quantities and write-offs.

Purchase Orders

(Detailed in Chapter 4)

Purchase orders may be required at any time, not just as a result of stocktake, so it has its own button and menu

The browse table can be set to show only uncompleted orders or only this year's orders.

- View, create and edit orders
- Email the supplier
- Print an order (paper or .pdf)

Items received are checked off.
When all items are received the line items are flagged as 'All received'

The order can then be copied to history and is automatically flagged as Completed
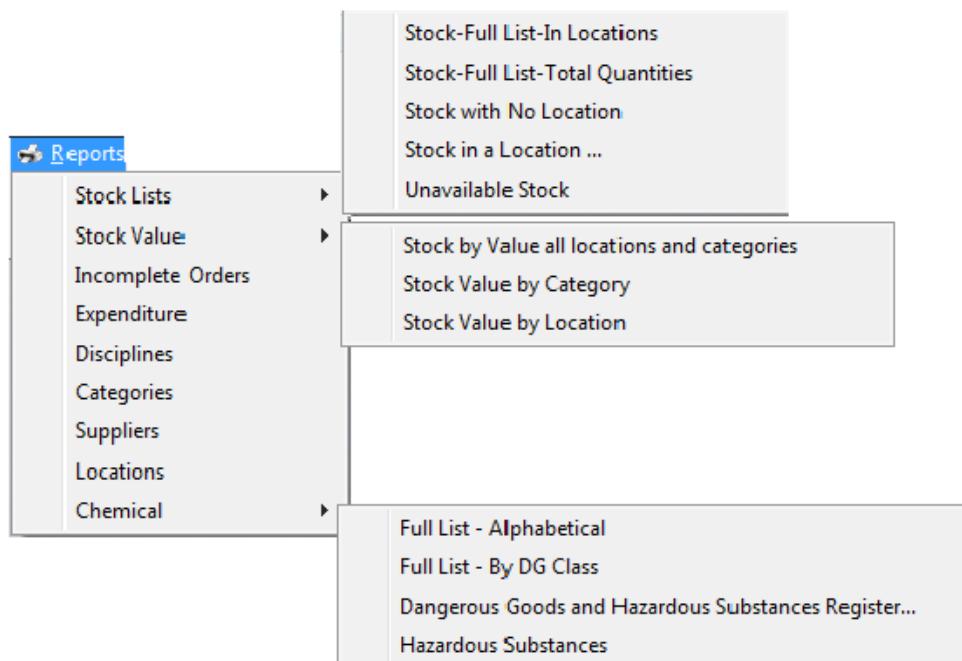
- View an item's purchase history

Reports

Reports are print-outs on paper. Most are A4 portrait in size.
All reports print to screen where the view can be resized, the contents viewed, and some or all pages printed.

A range of reports are available from the Reports menu.

This menu is subject to change as other reports may be added later.

Other reports, specific to a selected item, are available from browse tables

An order, for example, is highlighted and then printed

SciList Behaviour

SciList contains windows that display, print and operate on data. Before working with SciList, it is advisable to familiarise yourself with the following:

Edit-In-Place

Where only one or two fields are to be edited, Edit-In-Place is often employed. This means if you insert or change a record you do it directly in the table, a bit like you do with a spreadsheet.

Edit-In-Place is indicated with a message above the table and the fields that you are able to edit are shown coloured yellow.

<DBL-CLICK>	Edit the selected record
<TAB>	Move to the next field
<ENTER>	Accept a change and save the whole line
<UP or DN Arrow>	Accept and move up or down the table
<ESC>	Cancel.

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Tables and Forms

Some records have many fields, some of which may be required, others optional.

These records are typically viewed on a Browse Table and edited on an Update Form.

Insert or Change buttons will open the record.

Usually double clicking will open a record for editing.

the OK button will accept and close the form.

The <ESC> key will cancel and close any form.

Update forms provide different techniques to prevent invalid data entry.

Keyboard Shortcuts for Update Forms

<ESC>   - Escape Key
                       Closes any window or cancels an operation.

<ENTER>   - Enter Key
                       Accepts data on a form and closes the window

<TAB>   - Tab key
                       Moves from field to field on a form

<SHIFT - TAB>   - Shift key with <TAB>
                       Moves to previous field on a form

Lookup Tables

Where a standardised word (such as a supplier name or item name) is being entered, usually a button with ellipses on it will provide a *LookUp Table*.
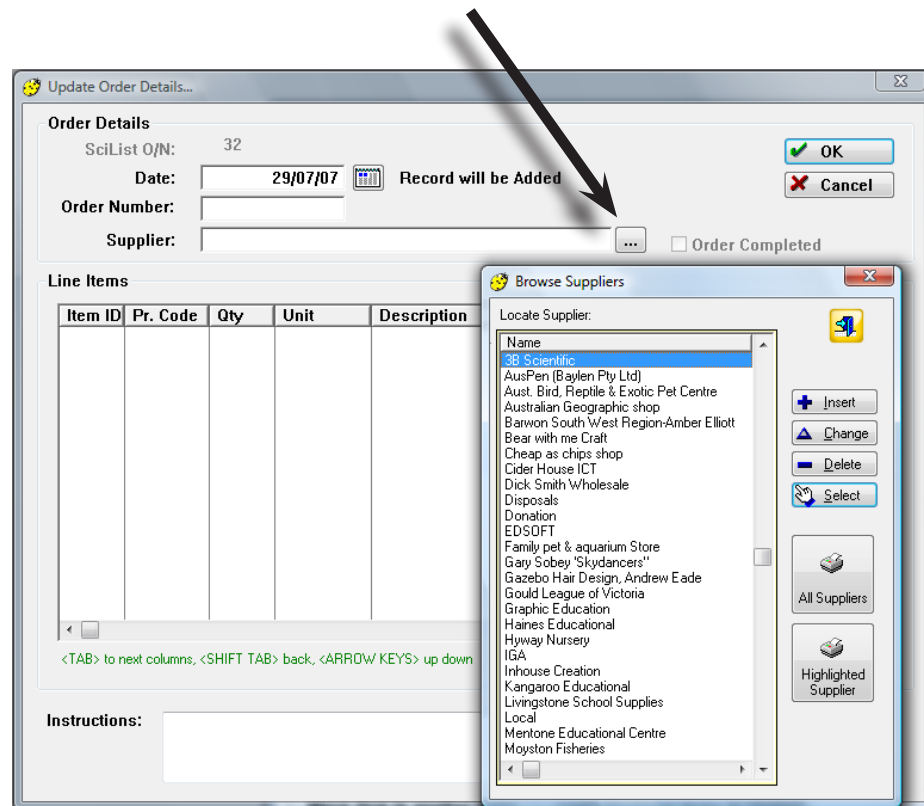
You may type the word, but if you get it wrong, the lookup pops up and you can choose the correct item.

Instead of fully typing a word, *it is often easiest to type the first letter of a word*, then press the <TAB> key to automatically bring up the lookup table from which to select.

The *<ESC>* key will close any window and cancel the update. Sometimes you get stuck in a loop where you want to cancel, but SciList tries to force you to make a choice. <ESC> will get you out of it.

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Sort Headers

Where tables offer *Sort Headers*, you can sort on one or more columns in forward or reverse order as shown here.
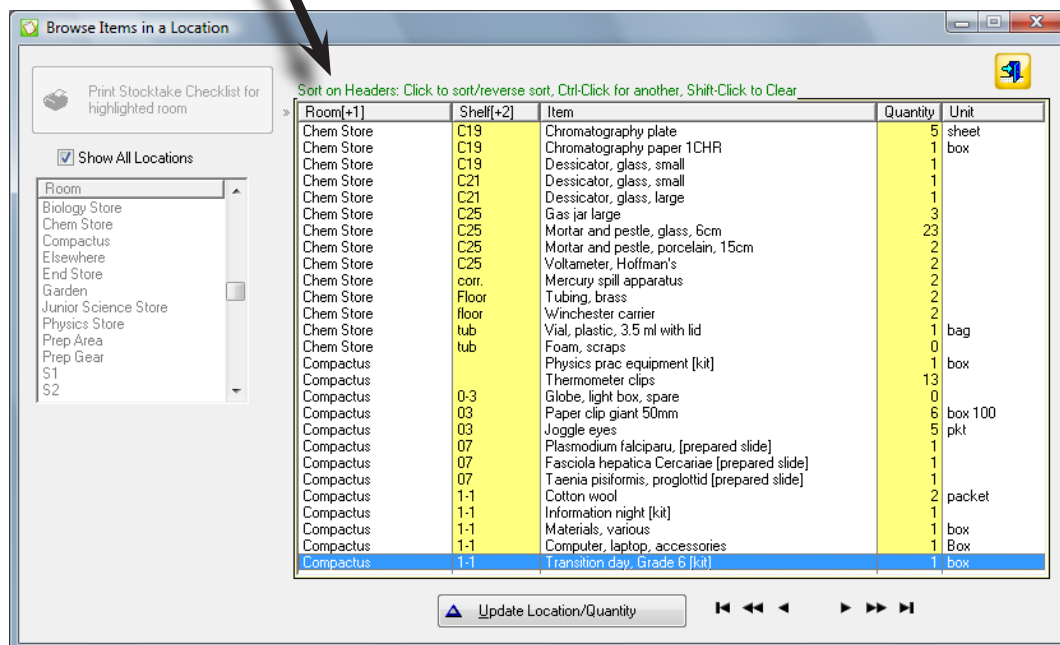
Click once on the heading to sort (ascending). Click again to reverse the sort.

Multiple Column Sorting

It is often useful to sort on one column, e.g. Room and then sort within that on another column e.g. Item, so that items are grouped by room and alphabetical within that.

To do this:
    <CLICK>   on first column header
    <CTRL - CLICK>   on successive columns
    <SHIFT - CLICK>   to clear the sort headers

Scrolling through long browse tables

Some tables can have many entries and you need to be able to browse through them.

Arrow keys will move up or down a line at a time.
<Page Up> and <Page Down> keys scroll one screen at a time.
<CTRL> with <Page Up> or <Page Down> will go to the Top or Bottom of the list

Some tables offer VCR controls which move you through the list.

They go to top or bottom, screen up or screen down, or single line at a time

Locators

A locator is present on tables with many records and is indicated by a prompt like *Locate Item* or *Locate Category*.

A locator allows for automatic scrolling based on the data in one of the columns and makes it easier to find one item from many in a list.

First *click the table anywhere* so Windows 'knows' what your mouse is focussed on.

Then *type the first few letters* of the word you want to scroll to. The letters show above the table as you type, and the table simultaneously scrolls to the nearest matching record.

The *Up or Down Arrow* will totally clear the locator text.
Use the *Backspace Key* to remove characters.

When located, you can edit that record as usual.

Printing

As long as a printer is installed under Windows, it will work with SciList. Choose a printer from the File menu. You can change to any other printer available to you before a specific print job E.g. if you want to print in colour or print double-sided, this may be available on another printer.
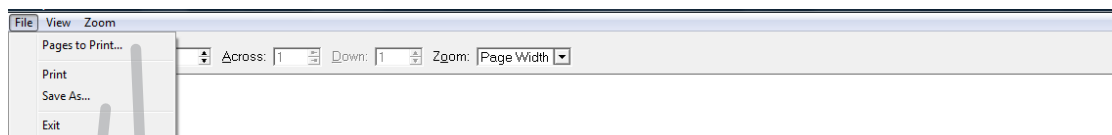
Stock Items by Location   Biology Store

Location	Item	Quantity	Unit
	Overhead projector	1	
	Telescope, astronomical, reflecting, 4"	1	
	Television set	1	
	Water sampler	1	
	Pole, extendable	1	
	Acacia seed (wattle)	0	pkt
01	Biot's apparatus	2	
01	Conductor, insulated, cone sphere, hollow ball	1	
01	Electrophorus, simple form	1	
01	Electroscope, pivoted needle with scale	2	
01	Electroscope, gold leaf	11	

All reports preview to screen where you can view the output.

At this stage you may:

- cancel
- print all pages
- select some pages to print
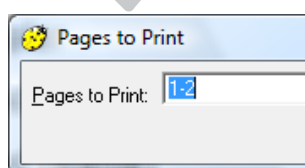
To print specific pages, go to **File > Pages to Print**.

Enter page numbers separated by commas e.g. 1,4,5, or a range of pages by using a dash e.g. 1-5, or combination e.g. 1,5-9.
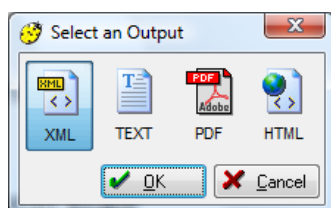
Print to Text, XML, HTML, or Acrobat Reader document

From the preview window, all or most reports offer the ability to:

- print to an Acrobat .pdf file
- print to a text file
- print to an html or xml file

Go to **File > Save As...**

Select one of these options and you will be prompted for a file name and location.

Chapter 2

Building your Stock List

What this chapter is about

This chapter provides a detailed guide to setting up SciList, along with the rationale behind the decisions you may have to make as you proceed.

It is assumed that you have read and understood the previous section, covering how to insert and edit records, and how to locate records in tables.

Everything in this chapter relates to the Master Items and Locations button shown or from the menu Manage Stock > Master items and Locations

Building the Database

Before beginning your database, you should think about how you intend using it.

You start with a list of **items** and link each item to one or more **locations**. You can print lists of items by location.

Assigning **sub-locations** allows you to produce a report of items stored in fairly specific locations, for example, all items on Shelf 3 in the Physics storeroom. This makes finding items and stocktaking much quicker and easier.

Setting ideal, or desired, quantities on items allows for effective stocktaking. After a stocktake, stock numbers are compared to your ideal stock numbers. Orders can be automatically generated for identified shortfalls.

To produce reports based on groupings of items, for example, a list of all your charts, or all equipment items used for year 7 Heat unit, you will need to assign an item to one or more **categories** or **disciplines**.

It is more time effective in the long run to assign location, quantity and category/ discipline details as you put an item into the database. However, these details may be added at any later stage.

Some lists have been included for you as a starting place – categories, disciplines, suppliers.

An extensive list of common science department equipment has been supplied with SciList.

Managing LookUp Tables and Constants

Much of the data you work with will hardly change once it has been entered. This includes: your Organisation Details, Suppliers, Categories, Disciplines, and Locations.

Organisation Details

File > Local Settings
The contact details are used on orders and other reports. You may also activate the email facility and set your email details here.

Auto-generate Order Number
If you want SciList to create the order number, check this box. SciList will generate an increasing order number for each order, e.g. 12, 13, 14 ...

You may add an optional prefix. e.g. SCI so that an order number would be created as SCI12, SCI13, SCI14...
The automatic order number can be over-written by you at any time.

If you use a separate order book, do not activate Auto-generate

Activate Email

Check this box to activate the Email Setup tab (below).

Email Settings

You need to contact your network manager for your specific server settings.

Domain
Usually not critical, and can usually be left blank

Server and Port
The name of your email server and its port. SMTP mail defaults to Port 25, but yours may be different.

Authorised User
General email usually does not require an account name in order to accept an email. In this case, leave it blank like the above example.

Managed Servers such as Edumail in Victoria will not accept email unless it is from an authorised user with a password. In this case, you must enter an account name and its password. Depending on how the server is configured, the account name may simply be the name e.g. tom, or it may be the full account name tom@edumail.vic.gov.au.

Send Test Message
A sample email will be sent using the settings from this window to the email address on the General tab. You may need to try different variations. Some servers require Authorised User, others won't work unless it is empty.

Chemical Options

If using SciList to record chemicals, check these settings

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Suppliers

Browse Lists > Suppliers

Required when managing purchase orders and purchase history. When starting off with SciList you could ignore these until you get around to handling purchase orders and then add them as you need them

Edit buttons

Print list of all suppliers

Print one page with several formats of mailing label

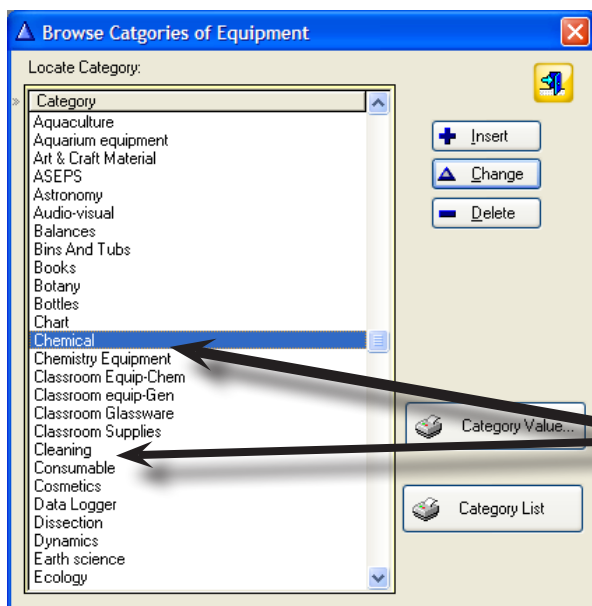If you enter a website for a supplier, the link at the top of the browse window is active.

Entering an email address will allow you to email this supplier.

Customer Account Number, if you have one, entered here will appear on any purchase order.

Supplier Update Form

Categories

Browse Lists > Categories

A range of categories are supplied. You may edit these to suit yourself.

Categories can be useful to group items relating a common theme, even though they may be disimilar.

This can be useful during stocktake for example.

Chemical and *Consumable* are both used within SciList by the program.

We suggest you use singular rather than plural where practical i.e. Chart, not Charts

Locations and Sub-locations

Browse Lists > Locations

A location is usually something that has many items, such as a store-room, classroom, or compactus.

Each location is typically (but not always) broken into sub-locations such as shelves, cupboards etc.
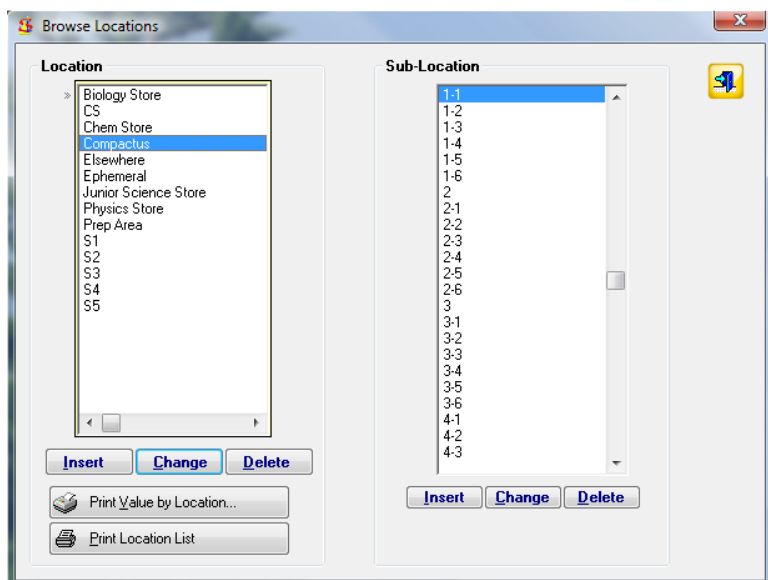
In this window, the sub-locations are shown for the highlighted location. Each location will have different sub-locations.

From this window, you may edit Locations (left) and the highlighted location's Sub-locations.

Sub-locations should be entered systematically as shown in the example for a compactus, where the numbering represents bays and shelves.

It is important to have the main locations correct before adding stock items.

From this window you may also print a list of all locations and sub-locations and print a list of items in each location based on a minimum value. e.g. all items above $500

Disciplines

Disciplines provide another way of being able to print and sort items.
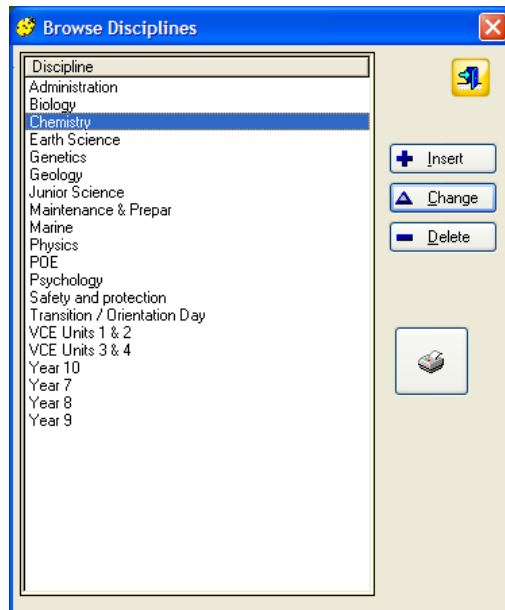
It is OK to change the names of Categories, Locations, and Disciplines. any time. Items in them will remain in them.

Items and Stock

To view the list, click on the 'Manage Stock' button.

This screen provides access to all the main functions relating to stock items:

- Insert, change or delete master item names
- Add master item descriptions, unit descriptors, images
- Add locations, quantities, stock comments
- Add or view purchase histories
- Assign categories and disciplines
- Key word search.

The tick in the first column indicates the item is in stock.

Master Item and Locations

Browse the list by using the scroll bar, or by locator, i.e. type in the first few letters of an item name to locate it.

- You may use an item name as is, alter it as you wish, or change it completely.

- Unwanted item names may be deleted as you come across them. Alternatively you may wait until you have built your database and assigned locations to all your stock items, and then delete all unwanted item names en masse. (Utilities Menu > Clear Items with no Locations)

Editing Master Items

To Insert a master item

Click the insert (Ins) button. (On left hand side of window)

Enter the name of your item on the Update Master Item form.

When naming a master item, use a systematic format to assist the grouping and locating of similar items. e.g. Globe 12W, Beaker 500 ml

Use singular, not plural. 'Globe', not 'Globes'

Add other details as appropriate.

For Chemicals See Chapter 6

The Item Value is optional. The entry can be automatically updated when purchase orders are saved to history, and over time, many values will end up here. You might initially only enter a value for items required on the school Asset Register. e.g. items over $500. Or you may need to enter all values for the full insurance value of all stock. See *Reports > Stock Value* to print.

The latest price of purchase goes in to Item Value field. So if you buy a new unit of an expensive item, all existing ones will be considered to be that value also. For example, a new dual power pack is around $500 now. But you may not want the value for the one you have had for 30 years recorded at $500. Solution – enter as individual Master Items, no. 1, no. 2 etc. , each with its own separate value and purchase history.

Another idea is to record historical values for older items in the Description field of the Master Item.

To delete a master item

Highlight the item and click the delete (Del) button. This will delete the item and all its connected information including locations, purchase history, etc. It will not delete the item from any relevant purchase order.

To change a master item

To alter the master item title, or add or change other details, highlight the item and click on the change (Ch) button.

Master Item Specifics

Master Item Description

A written description of an item may help to:

- Specifically identify it (model numbers, range, brand, etc.)
- Inform about its usefulness (dimensions, construction materials, intended uses, etc.)
- Describe component parts
- Describe related items (for example, the name of a series of charts, or other equipment the item may be closely linked with)
- Enhance keyword searching (for example, the item title for a prepared slide is *Fasciola hepatica* Cercariae, while the description might contain its common name, Liver Fluke. A keyword search of any of these words will then find the slide
- Serial numbers of expensive equipment can be included in the description.

To add or change a description, click change (Ch) on the Master Item List screen to go to the Update Master Item screen. Click on the Description box and add your details.

Images

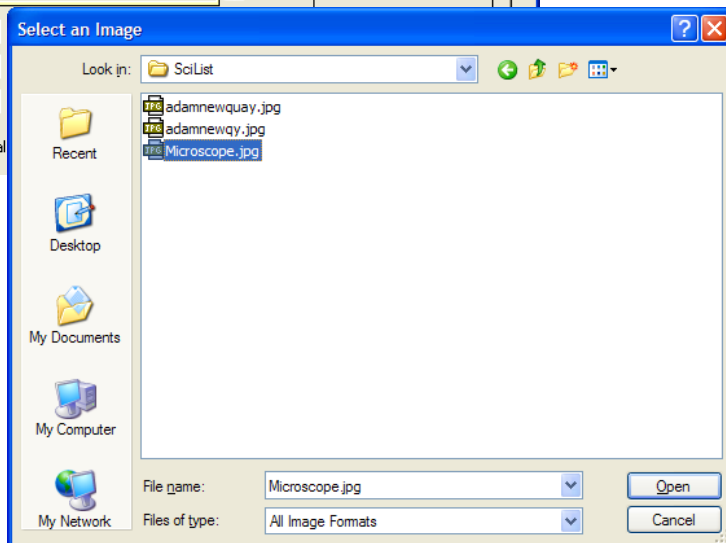An image may be included for selected items to more completely identify them to users. This is particularly useful for charts, unusual equipment, and equipment kits.
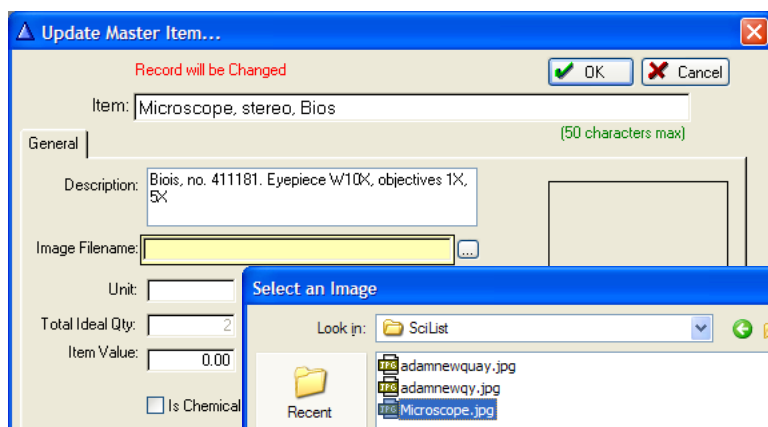
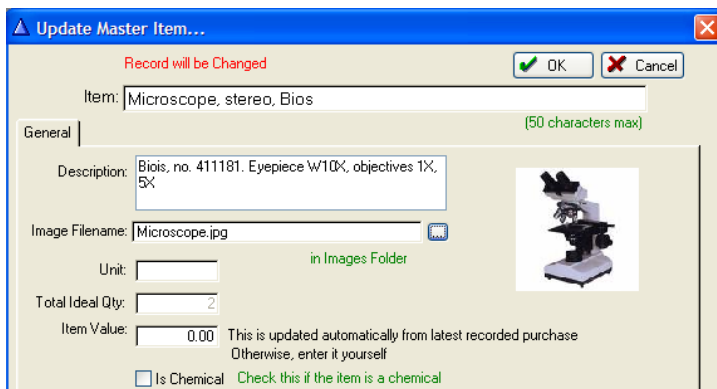Click the ellipses (...) button to bring up a file dialog box...
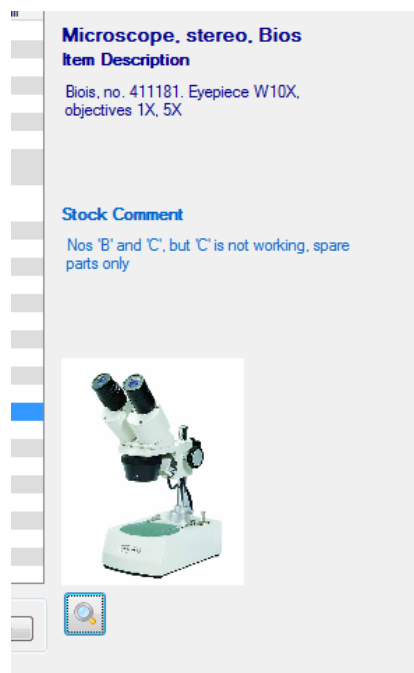
Select the file...

Click open...

The image is automatically copied into the SciList Image sub-folder

The image will appear on the Master Item List in all search modes – main list, keyword, category and discipline, and on the Master Item List update screen.

The magnifying glass (bottom) allows you to view the image in more detail.

Unit

When adding an item, add a unit description if it helps during stocktake, ordering, and locating equipment.

For example, if you buy plastic cups by the carton, and count them during stocktake by the carton, then record 'carton' or 'ctn' in the unit field. Whenever you see a screen or produce a list showing the stock level of plastic cups, the unit 'carton' will also appear. Other descriptors of units might be 'box', 'box of 10', 'pkt 100', etc.

Otherwise leave the unit field blank for counting individual items.

Total Ideal Quantity

You can't edit this field. The number shown here represents the total ideal (or desired) quantity of this item you have stored at all locations. It is calculated automatically, by totalling the ideal quantities from each location of that item.

To Save

When you have added all the information you wish, click 'OK' to finish. You may edit the information at any time by clicking change (Ch) on the Master Item List screen.

Importing Items

If you already have a list of items and locations in a computer format such as a spreadsheet, you may be able to import them. See Chapter 7 for details.

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Working with the Stock Item List (right side of screen)

Use the Edit Stock (Locations) buttons on the lower right to edit details of a master item in one or more locations.
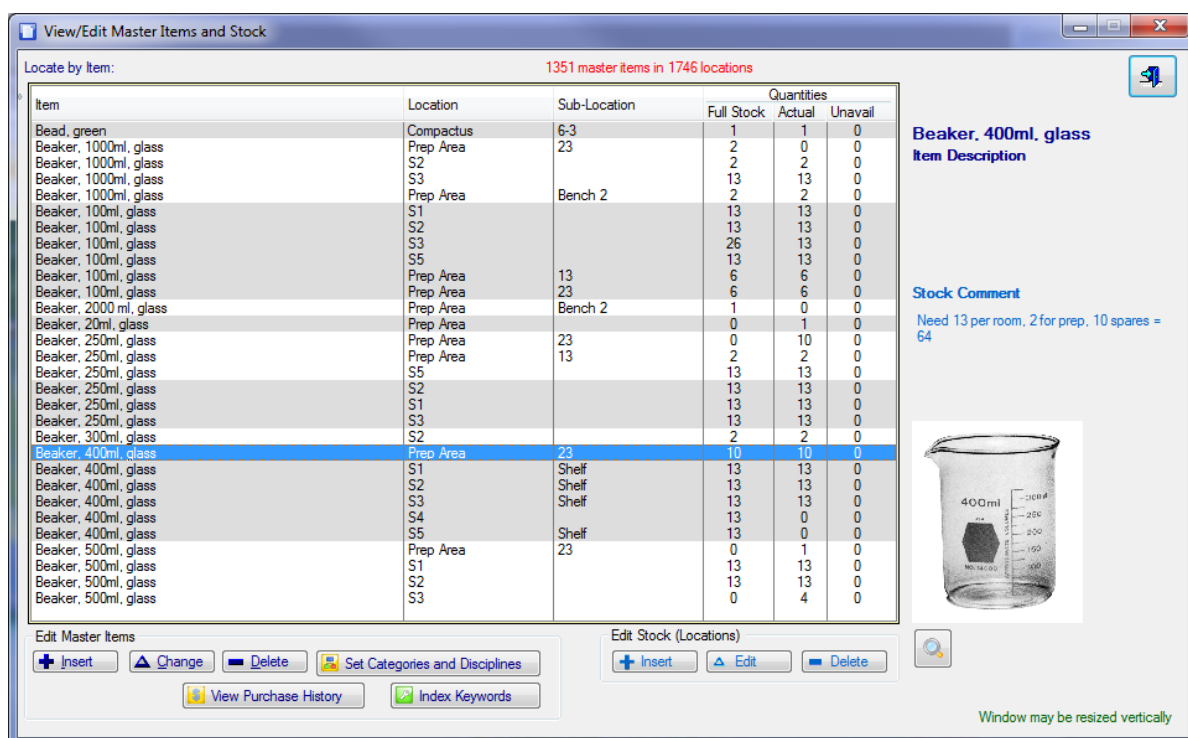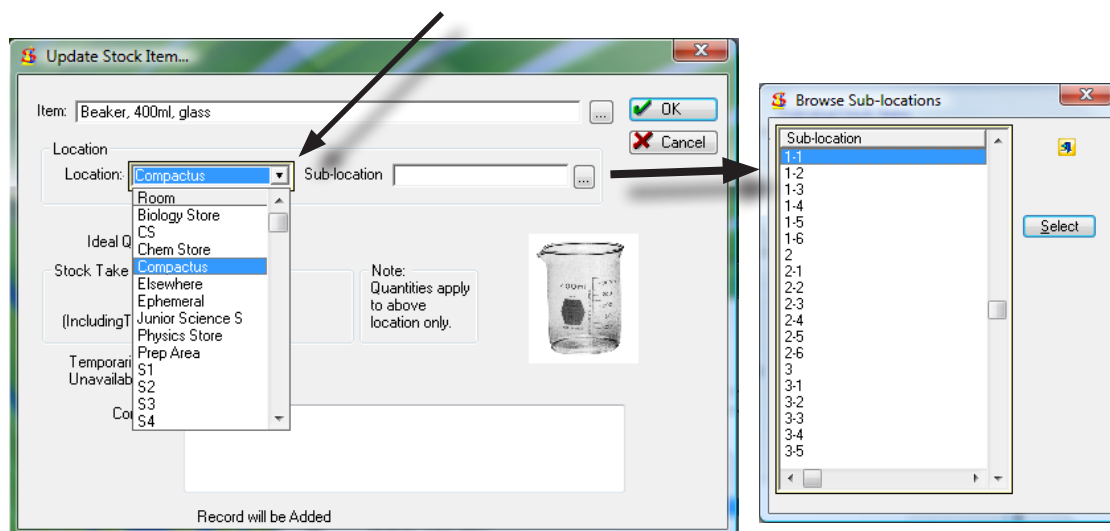

Locations

Adding locations allows you to:

- Find items quickly
- Put items away in their correct place
- Produce reports of items at a location
- Stocktake using specific checklists for small or large storage areas

Master Items often reside in multiple locations (as in above example)

Select from a drop list of Locations and then look up the Sub-location (...)

Organising your Locations

Hint: It is a good idea to have a map of your major locations with their sub-locations before entering them.

Common Locations and Sub-Locations are best entered early in your work with SciList. (From the *Browse Lists* menu)

You may choose to nominate your rooms or parts of a room as Locations, and give them appropriate names, for example, Biology Store, Physics Store, Classroom 1, Classroom 2, Compactus, etc.

Sub-locations could then be Shelf 01, Shelf 02, Cupboard 01, Drawer 01, Drawer 02 , Bench, Floor, etc. (It is a good idea to have these all physically labelled and a map drawn of these sub-locations before entering stock).

If any numbering sequence is likely to exceed 9, then use two-digit numbers from 01 to 09. This is required by computers to properly sequence the numbers in lists.

Compactus shelves could be numbered firstly by Bay and then by shelf, for example 1-6 (Bay 1, shelf 6). Be consistent when you enter these names. Bench (with a capitalised first letter) and bench will be treated as two sub-locations, as will Drawer 1 (with a space) and Drawer1.

Use **Utilities > Change case of locations** to standardise the case after you have entered them all.

Choose between formats: Room 1, ROOM 1, room 1

The stocktake facility allows you to print stocktake checklists. The more specific you are assigning locations and sub-locations, the more detailed the stocktaking checklist will be. You can check equipment shelf by shelf, drawer by drawer, cupboard by cupboard.

If you don't need to assign sub-locations to your equipment items, that's OK. You may perform your stocktake room by room.

It is entirely up to you how you organise your locations and sub-locations. It helps to physically label your sub-locations for stock locating and stocktaking purposes.

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Stock Reports by Location

Several reports of items are organised by location.

Reports		
Stock Lists ▶	Stock-Full List-In Locations	
Stock Value ▶	Stock-Full List-Total Quantities	
Incomplete Orders	Stock with No Location	
Expenditure	Stock in a Location ...	
Disciplines	Unavailable Stock	
Categories		
Suppliers		
Locations		
Chemical ▶		

Stock Items in : Physics Store

Item	Sub-Location	Total Qty	Unit
Acceleration sensor 2-axis	Shelf 09	1	
Airtrack	Bench	1	
Airtrack accessories	Shelf 15	1	box
Alternative energy [kit]	06, floor	1	kit
Ammeter, 0-1 and 0-5 amp range	Floor, 25	9	
Ammeter, 0-10 amp range	Floor, 25	1	
Ammeter, 0-5, 0-10 amp range	Shelf 25	2	
Ammeter, 0-5A, 0-50mA ranges	Shelf 25	1	
Ammeter, AC, 0-5 amp range	Shelf 02	4	
Ammeter, industrial	Display	2	
Anemometer, cup type, hand held	Shelf 02	1	
Armature [model]	Shelf 08	1	
Audio Amplifier	Shelf 02	1	

Stock in a location...

You may print an alphabetical list of all items in the Physics store, showing which shelf each is on.

Stock Items by Location: Physics Store

Sub-Location	Item	Total Qty	Unit
Shelf 02	Pump, base plate	3	
Shelf 02	Ammeter, AC, 0-5 amp range	4	
Shelf 02	Meter, high current, AC-DC, 0-25 amp.	4	
Shelf 02	Tuning fork, C256	4	
Shelf 02	Tuning fork, E320	4	
Shelf 02	Tuning fork, G384	5	
Shelf 02	Tuning fork, C 512	7	
Shelf 02	Pendulum bob, 2cm, plastic or wood	8	
Shelf 02	Calliper, vernier, steel	9	

You could also print all items in the store, organised by shelf.

Stocktake Activities > Print Checklists...

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Stock Items by Location: Physics Store

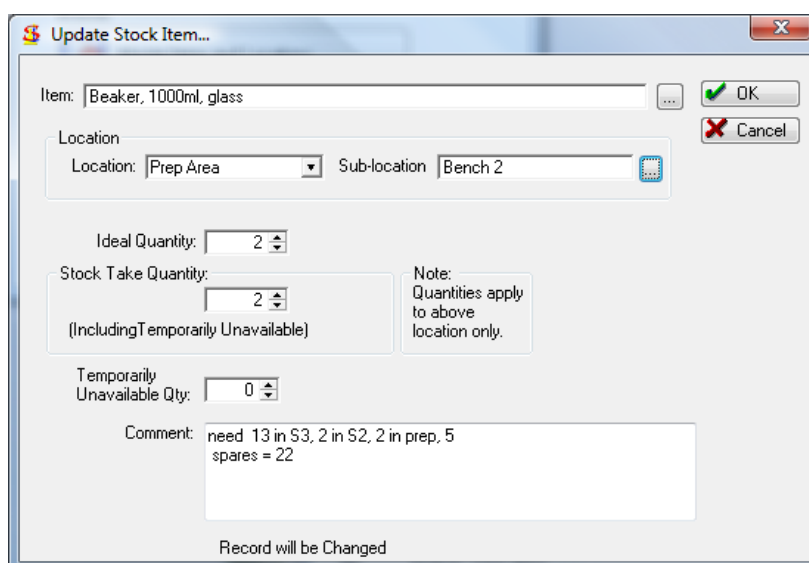| Sub-Location	Item	Quantity	Unit
Shelf 02	Kilowatt meter	1	
Shelf 02	Meter, AC current	2	
Shelf 02	Meter, high current, AC-DC, 0-25 amp.	4	
Shelf 02	Metronome	1	
Shelf 02	Micrometer, screw gauge, metric, to 25mm	5	
Shelf 02	Milliammeter	14	
Shelf 02	Music box	1	
Shelf 02	Oersted's apparatus	2	

You may select a single Location and print items alphabetical, by sub-location.

This allows you to stocktake shelf by shelf.

A full list of all stock, showing the location of each, is also available from the Reports menu

Quantities

You may record for each item: an ideal quantity, a stocktake quantity, and an unavailable quantity, described below.

Ideal Quantity

This is the total amount of an item you should have at this location/sub-location, or, in other words, the full stock level.

Record the ideal quantity of an item for every location at which it is stored. If you have two classrooms, each ideally with 13 spatulas, then you would put in 13 as the ideal quantity for each of those two locations. Your total ideal quantity of spatulas (26) is calculated by SciList and displayed on the Master Item update form so you know how many you have overall. This figure is also used in stocktake calculations.

For most items ideal quantity will be determined by how many you actually have. For example, 1 van der graaff machine, or 6 power packs.

For other items, stock numbers will fluctuate. You may want to have thirteen 100 ml beakers in a classroom, and replace them from a supply of spares when numbers fall below this. You would input 13 as your ideal number for the classroom location, and an appropriate number at another location for your supply of spare 100 ml beakers.

Stocktake Quantity

This is usually the same as the Ideal Quantity of the item, except when you are undertaking a stocktake. Then, it is changed by you in the appropriate screen of the stocktake facility, and it will automatically be compared with your ideal (full stock) quantity, and the shortfall calculated. After the stocktaking process has been finalised, the stocktake quantity will revert to again match the ideal (full stock) quantity.

For example, if you have thirteen 100 ml beakers as the ideal quantity in Classroom 1, and during stocktake you find you only have ten left, then the shortfall of 3 will be calculated by SciList. More details about this process may be found in Chapter 4.

Temporarily Unavailable

This field allows you to record an item that is not available for use at the moment. If, for example, you have 6 power packs (Ideal Quantity 6), but one is being repaired, insert '1' here. You still have the item, but anyone checking to see how many power packs are available for use, will see that there are only 5 available.

Stock Comments

Record any comments here that are relevant to the item at that particular location. Examples of use might be – serial number, intended use, use restrictions, level of use, special instructions, repair or maintenance record, etc.

Categories and Disciplines

Why?

Category and discipline fields allow classification of items into convenient groups. Multiple categories and/or disciplines may be assigned to items, to group them in a meaningful way. Use this facility to search quickly through a more specific list for the item you want, and produce lists of equipment in groupings from the very specific to general.

You may search for items based on AND or OR or NOT membership of categories and disciplines.

Sample lists of categories and disciplines are provided.

In these lists:
• Categories group similar types of equipment, or equipment used for similar purposes

• Disciplines group items of equipment according to the broad field of study (Physics, Biology, etc.) or the teaching level in which they are used (VCE Unit 1 & 2, Junior Science, Year 10, etc.).

Advice

Devise groupings according to your needs to retrieve item information and produce lists. You can assign multiple categories and multiple disciplines to an item, and search also by multiple categories and disciplines.

For example, if you assign the category 'Prepared Slide' to all your prepared slides, a search of that category would produce a list of all such slides, enabling you to quickly find the one you're looking for. You could also create more specific categories to produce shorter lists, for example, Prepared slide – animal, Prepared slide – plant, etc.

If you also applied the discipline, 'VCE Unit 3&4' to appropriate slides, a search by both category and discipline would generate a list of prepared slides used for Year 12 subjects. Adding another discipline, e.g. Biology, would result in a list of prepared slides used by Year 12 Biology students.

You may not wish to include every possible piece of equipment that is used in the teaching of a particular subject, but only to classify those which are particularly important, or perhaps need to be drawn to teachers' attention.

For example:
•   prepared slides for Year 12 Biology
•   charts available for Junior level human anatomy
•   all physics equipment
•   Physics equipment used by Year 7 'Heat' unit.

Assign a category to generate lists of items which need periodic checking, for example, Term check, Semester check, End of Year maintenance. For example, lab coats might be included in the mid-year maintenance, as well as the end of year maintenance categories. Senior microscopes might be scheduled for maintenance only once a year and so assigned only one category such as Term 1 maintenance.

Imagine how useful lists of tasks to be undertaken at particular times would be to a new LabTech.

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Assigning Categories and Disciplines to a Master Item

Manage Stock and Locations Menu > Master Items and Locations
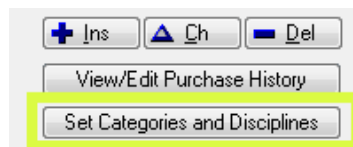
Highlight the item to which you wish to add a category or discipline, and then click on the 'Set Categories and Discipline' button (bottom of window).

The item you have selected will be displayed on the Assign Categories and Disciplines screen. You may toggle between displaying just the one item or displaying the entire item list using the **Show All** button.
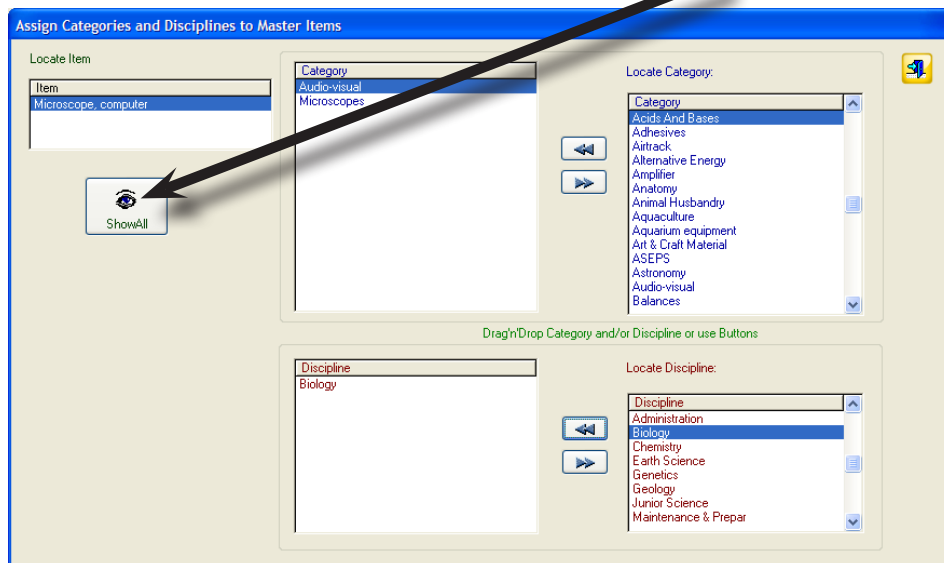
The blue (upper) browse lists allow you to add or remove categories.

The maroon (lower) browse lists deal with disciplines.

Each browse works in the same way:

- Use the scroll bar, or type the first few letters of the word, to search for the category you want.
- Highlight the category name by clicking on it.
- Drag and drop the category name or click on the top arrow to move the highlighted category to the screen on the left.
  (Remove it by doing the reverse).

- Add as many categories as you wish.

Repeat this process to assign disciplines.

Special Categories

Chemical

If chemicals are imported, a Category named Chemical is created automatically and chemicals added to it. For chemicals added yourself, a utility is to place all chemicals in the Chemical category. Utilities Menu > Add Chemicals to Category: Chemical

Consumable

When importing non-chemical data, the import file has a column named Consumable. If this is 'Yes' a category Consumable is created and the item placed in that category.

Keywords

Keyword Index

The database is searchable by keyword. This allows you to find an item even if you can't recall its exact title.

For example, did you list it under' Model brain', or 'Brain, model'? Or a prepared slide under its title 'Cnidaria, Hydrozoa-Hydra' and all you can remember about it is that it's a Hydra slide? Searching by Keyword, you will find these items.

To use the keyword search function effectively, think about all the terms you might want to look up an item by and make sure they are included in either the item title or description.

After adding or changing an item's title or description, re-index the keywords. This adds any new words you have used to the searchable list.

You might do this every time you add or change an item's title or description, or do it once after making many changes. You can set whether only titles, or titles and descriptions, are searched.

To Index Keywords:

(i.e. add new words to the list that will be searched):

Utilities Menu > Manage and Index Key Words or Master Item Screen
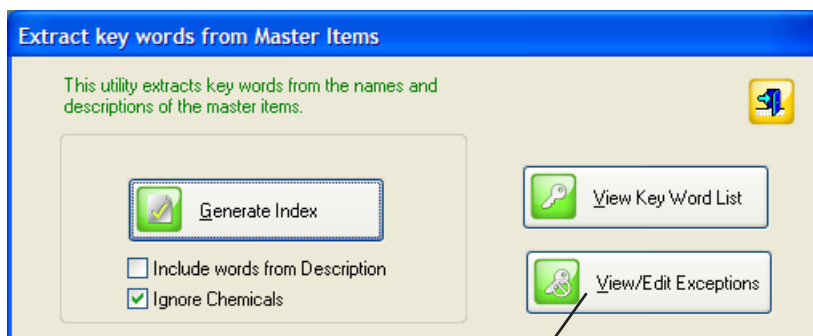
• Tick the check box 'Include words from Description' if you wish to include words from the item description field.

• Tick Ignore Chemicals if you don't need them indexed.

• Click on 'Generate Index'.

Numeric terms are not counted

SciList will take a few seconds to extract keywords from item titles and descriptions. Any new items and descriptions you have added will be included.
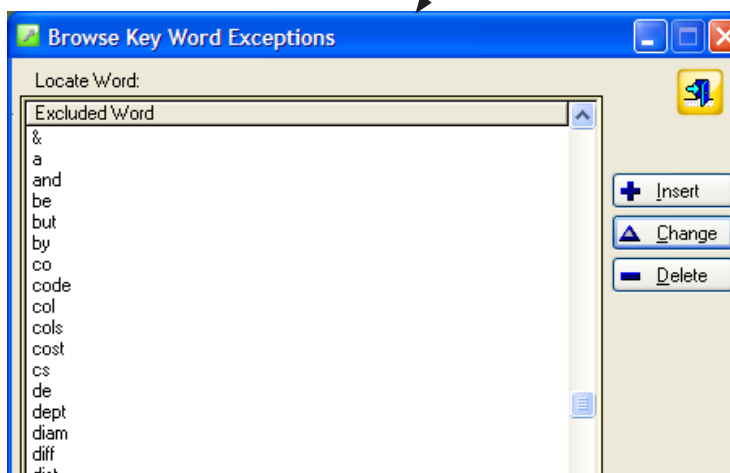
See Chapter 3 for locating stock by keyword search.

Keyword exceptions

Any items in this list will be ignored during the search. Keyword exceptions are words that are meaningless as search clues; words such as "and", "or" and "the". SciList has a keyword exception list with many words in it already. You can add to it at any time.

Purchase History

What is it for?

When an order is received in SciList, the items on the order can be marked as received and when all have been received, copied to a purchase history.

Details such as price, product number, supplier and purchase quantity will be recorded for an item in the master item list. Over time, a purchase history is built up which is useful for future purchasing decisions.

In future, after a stocktake is completed, SciList will automatically generate orders for under-stocked items, using supplier and pricing details from the purchase history. An item will be added to an order to the supplier from whom you last purchased the item, along with the price, product code, and quantity required.

Items with no history will be added to an order with the supplier 'Supplier not known' from where they may easily be moved to another order.

Adding, changing, or deleting a Purchase History

While much of the management of the purchase history is automatic, you may of course manually edit it.

• Highlight the item in the master list
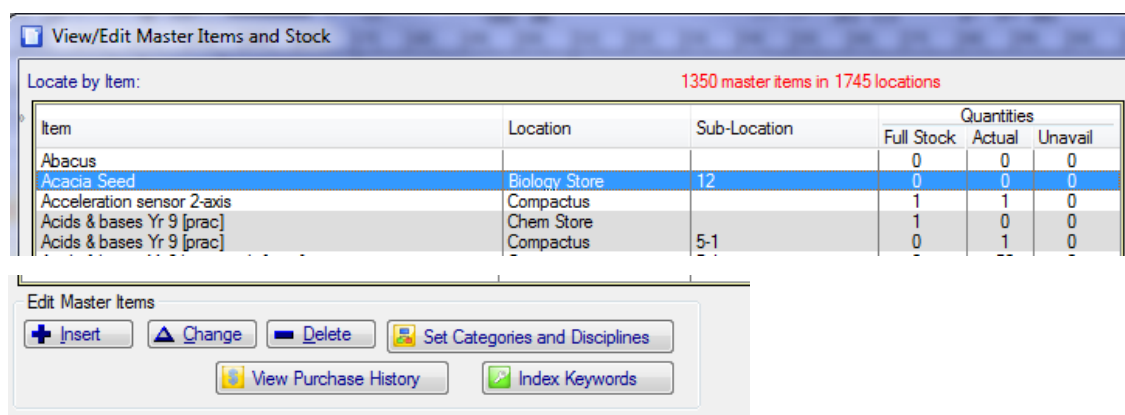
• Click the View Purchase History button (above).
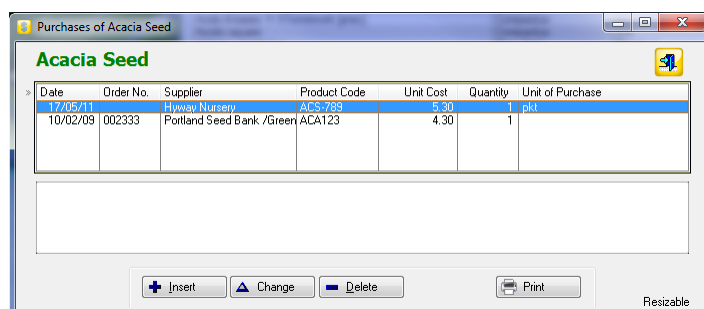
• Use the edit buttons to update the entry.

• Use the look-up button for a list of suppliers

From the lookup table of suppliers, either

• select the one you want

• or add one if they are missing, and then select.

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Chapter 3

Locating Stock

What this chapter is about...

This chapter is about how to find items of stock using these three lower buttons from the Main Window toolbar

These buttons represent the location of stock by these methods respectively.

- keyword searching
- browsing a selected location
- narrowing stock down to membership of a category and/or a discipline

Each option then presents its own functionality, such as general editing of stock and locations, assigning stock to categories or disciplines and printing various lists.

Keyword Searching

What is keyword searching?

Keywords include any word in the name of an item and words in the description if you choose to include them in the indexing.

You can't be expected to know the precise name of every item, but you would most likely know part of the title, e.g. "meter"

Keyword searching will list all items that include a specified word.

Creating the index

Utilities > Manage and Index Key Words
and on Master Stock Screen

Indexing keywords is discussed in the previous chapter because it is part of the process of adding stock into your list. Periodically you need to perform an index, so the new names and descriptions can be searched for keywords. Every time you do an index it starts from scratch and rebuilds the index. At the same time you might add keyword exceptions.

Keyword exceptions are words that are meaningless as search clues; words such as "and", "or" and "the". SciList has a keyword exception list with many words in it already. You can add to it at any time.

Searching on keywords
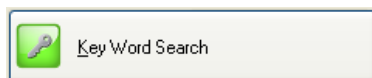
Use this button to bring up the following window.
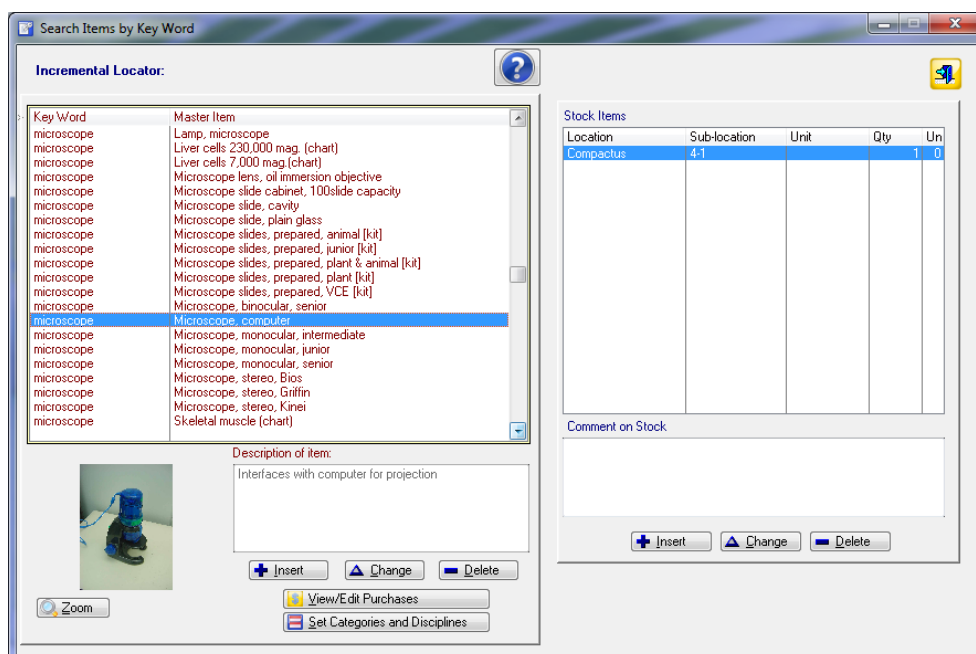
Keywords are alphabetically arranged in the left hand table with their associated master item.
On the right are the locations of that master item.

Master Items and Locations may be edited from this window in the same way as from the Master Items and Locations button.

The keyword search utilises an incremental locator. This means that as you type, the list scrolls to the first item that matches what you type.

Example: I'm looking for a beaker.

I start by clicking in the keyword table anywhere.

As I type 'beak' the cursor moves down to the first beaker.
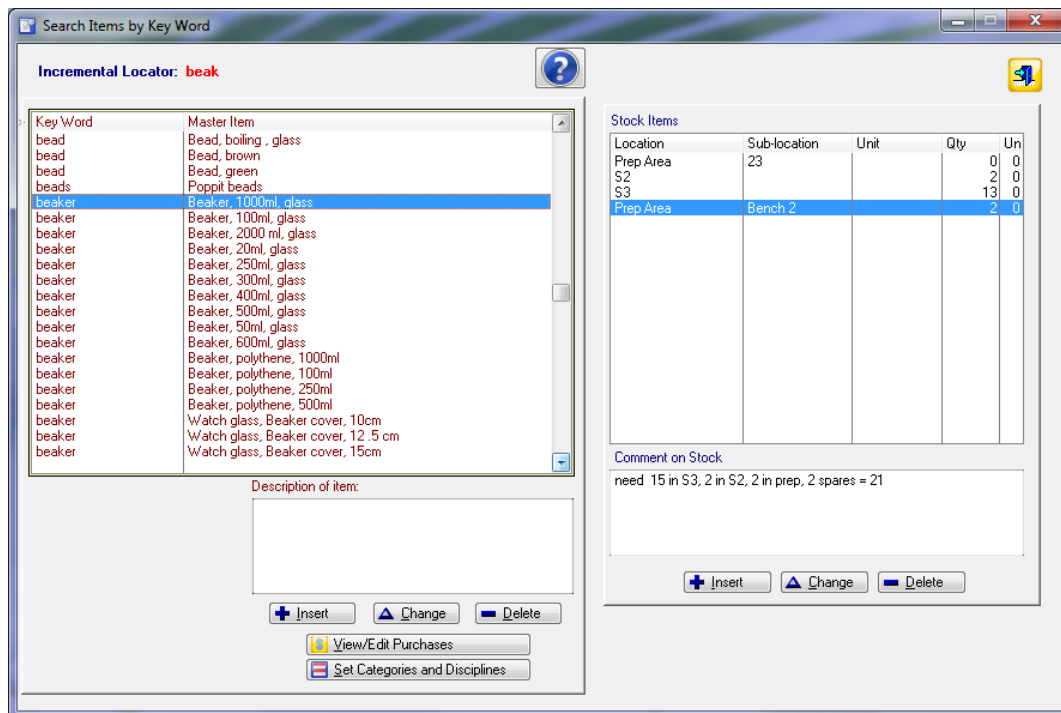
You may then scroll to the specific item of interest.

Using Up or Down arrows clears your typing.

You can correct with the <BACKSPACE> key.

Stock by Location
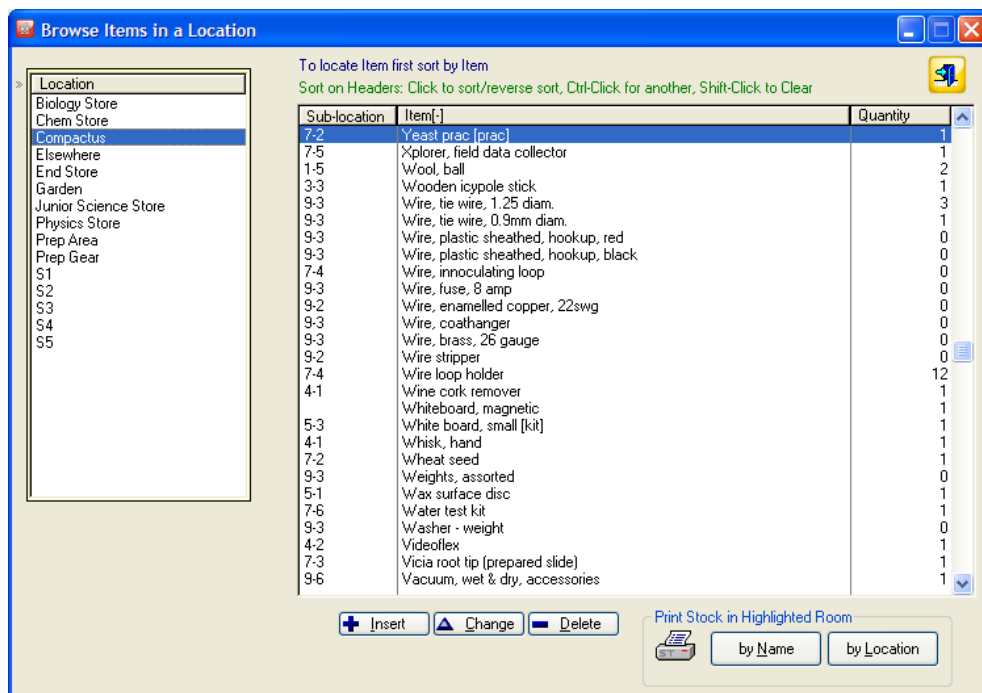
Highlight a location on the left.   All items in that location appear on the right.

The right hand table can be sorted on its headers. For example you may want to sort alphabetically on item name with each sub-location.

To do this you would Click the header "Sub-Location" to sort by that column. Then Ctrl-Click on the header "Item" to sort on items within the sub-locations.
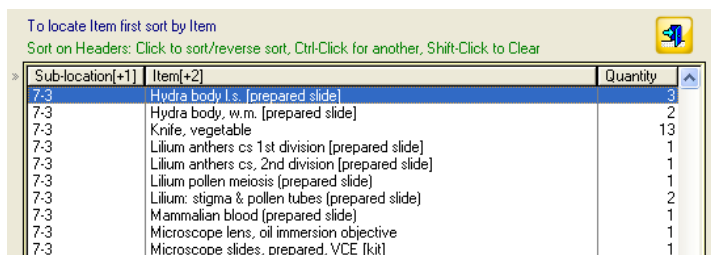
Note the +1 and +2 on the headers.

1 indicates the primary sort
2 indicates the secondary sort
+ indicates A-Z
- indicates Z-A

Sort headers can be cleared with <Shift-Click> on any heading.
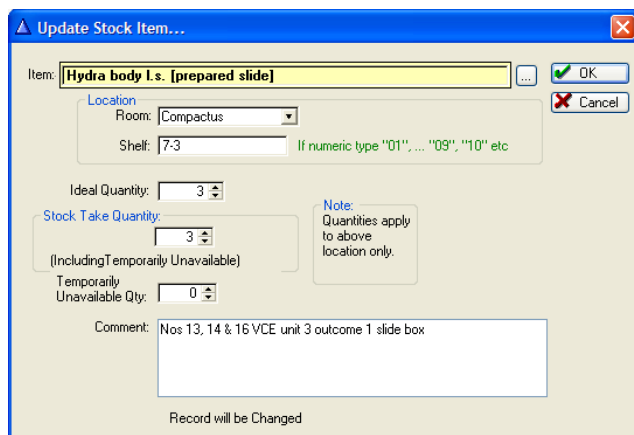
After locating a stock item, it may be edited with the usual update buttons.

You may print items ordered by Name or Location...

Ordered by Name

Stock Items in : Compactus

Item	Location	Total Qty	Unit
Acacia seed (wattle)	7-2	1	pkt
Acids & bases Yr 9 homework [prac]	5-1	50	
Acrylic square	5-6	0	
Amoeba (prepared slide)	7-3	5	
Artemia (prepared slide)	7-3	1	
Bag, brown paper	1-5	2	pkt
Bag, plastic	1-5	5	
Balance, spring, to 3 kg	9-1	2	
Ball, golf	5-5	14	
Ball, plastic	5-5	6	
Ball, solid rubber	5-5	5	
Ball, tennis	5-5	18	
Balloon	1-4	2	pkt
Balsa wood	9-6	14	strips
Bead, boiling , glass	8-3	100	
Bead, brown	6-3	1	jar
Bead, green	6-3	1	jar
Beehive shelf	8-4	12	
Blindfold	7-5	10	
Blood grouping tile	7-2	8	
Blood, amphibian (prepared slide)	7-3	1	
Blowpipe, mouth	8-3	25	

Ordered by Sub-Location within a Location

Stock Items by Location: Compactus

Sub-Location	Item	Total Qty	Unit
1-3	Chalk, coloured	1	box
1-3	Protractor, plastic	13	
1-3	Raffia, nylon	0	
1-3	Taper, wax	0	pkt
1-4	Cork, new	10	
1-4	Pipecleaner, cotton	1	pkt 1000
1-4	Plate, plastic	2	pkt
1-4	Cotton thread	2	roll
1-4	Candle	5	pkt
1-4	Balloon	1	pkt
1-4	Skewer, wood	3	pkt
1-4	Cork, champagne	200	
1-4	Plasticine, used	1	chunk
1-4	Straw, plastic, loose	1	box
1-5	Bag, plastic	5	
1-5	Bag, brown paper	2	pkt
1-5	String	1	ball
1-5	Wool, ball	2	ball
1-5	Stockings	1	bag
1-5	Fishing line 0.4mm	1	reel
1-6	Straw, plastic	1	carton
1-6	Peg, clothes	20	
2	Pencil, writing, set	0	set
2-1	Sheet protector, A3	40	

Stock by Category/Discipline

 Stock by Category/Discipline
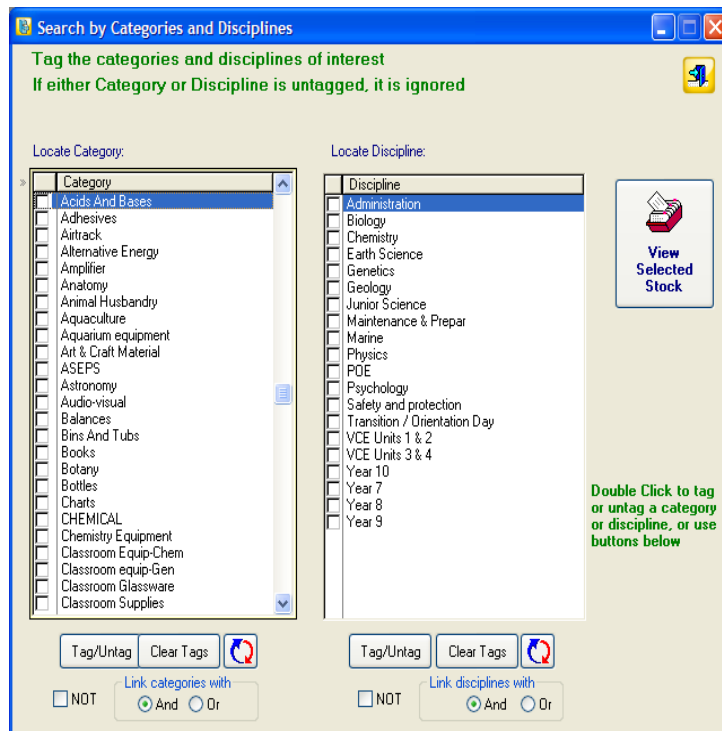
This window allows you to display stock based on its membership in categories or disciplines or combinations of one or the other.

Tag at least one category or one discipline, or both, then click **View Selected Stock** to see the items that match.

The double arrow button below the tables reverses the tagging

Example: Tagging "Microscopes"
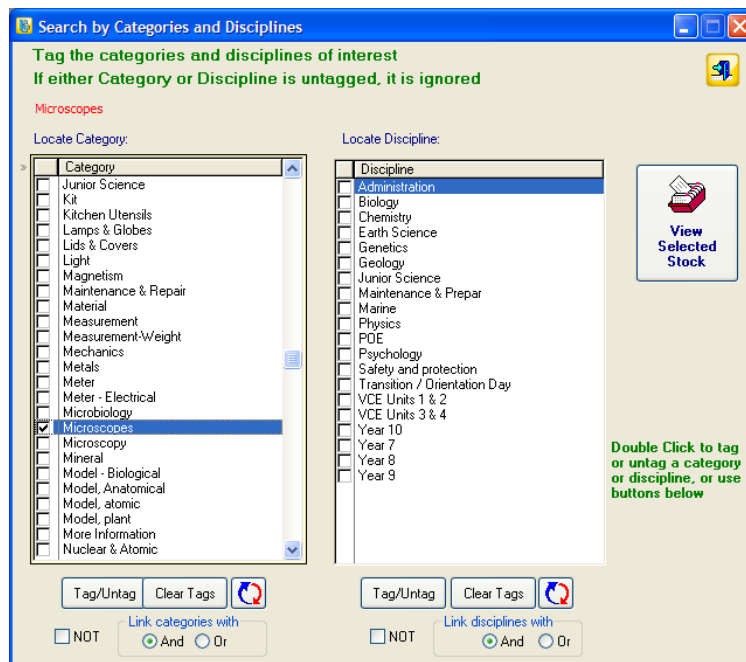
After ticking the category or discipline, click this button.

All microscopes are now displayed, regardless of location. (next page)

(This window can take a few seconds to appear because SciList must check all master items against your selection criteria.)

You may edit any master item or any stock details from this window.

The print button shows the quantities and locations of all matching items.

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Stock matching criteria ...

Microscopes

Item	Location	Quantity	No. Available	No. Unavailable
Lens cleaning tissue				
	Junior Science Store -	1	1	0
	Prep Area -	2	2	0
Microscope, binocular, senior				
	Junior Science Store - 24	1	1	0
Microscope, computer				
	Compactus - 4-1	1	1	0
Microscope, monocular, intermediate				
	Junior Science Store - 19	12	12	0
Microscope, monocular, junior				
	Junior Science Store - 18	15	15	0
Microscope, monocular, senior				
	Junior Science Store - 24	12	12	0
Microscope, stereo, Bios				
	Junior Science Store - Bench	2	2	0
Microscope, stereo, Griffin				
	Junior Science Store - Bench	2	2	0
Microscope, stereo, Kinei				
	Junior Science Store - Bench	1	1	0

Complex queries

The Boolean operators below the Category and Discipline tables allow more complex searches.

NOT(CHEMICAL OR Chemistry Equipment)

Locate Category:

This example shows how to select all items that are in **neither** of the categories Chemical or Chemistry Equipment.

The logical structure of the query is shown above in red text.

This search is for Non-consumables in the Chemistry discipline.

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Browse List of Non Consumables in Chemistry

This browse table may be edited or printed (below)

Report on Non Consumables in Chemistry

West Coast High School

Stock matching criteria ...

NOT(Consumables) AND Chemistry

Item	Location	Quantity	No. Available	No. Unavailable	
Chemistry game [game]					
	Compactus - 8-2	6	6	0	set
Chromatography column with sintered c					
	Compactus - 8-5	3	3	0	
Chromatography of smarties [prac]					
	Compactus - 8-2	1	1	0	
Chromatography plate					
	Chem Store - C19	5	5	0	sheet
Clamp, universal					
	Junior Science Store - bench	17	17	0	
	S3 -	27	27	0	
	S5 -	41	41	0	
Cleansing lotion					
	Chem Store - C18	200	200	0	mL
Clip, spring, Mohrs, metal					
	Compactus - 8-3	5	5	0	
Colorimeter					
	Compactus - 8-6	1	1	0	

Other Sample Stock Reports

Reports

Stock Lists ▸	Stock-Full List-In Locations
Stock Value ▸	Stock-Full List-Total Quantities
Incomplete Orders	Stock with No Location
Expenditure	Stock in a Location ...
Disciplines	Unavailable Stock
Categories	
Suppliers	
Locations	
Chemical ▸	
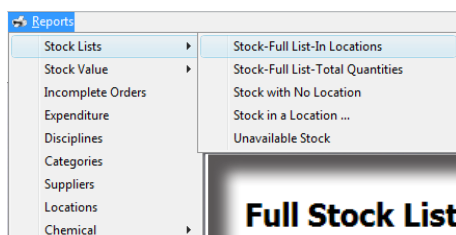
West Coast High School

Full Stock List with Location

Item	Location	Ideal Qty	Unit
Acacia seed (wattle)	Compactus - 7-2	1	pkt
Acceleration sensor 2-axis	Physics Store - 13	1	
Acids & bases Yr 9 [prac]	Chem Store -	1	
Acids & bases Yr 9 [prac]	Compactus - 5-1	1	
Acids & bases Yr 9 homework [prac]	Compactus - 5-1	50	
Acrylic square	Compactus - 5-6	0	
Adaptor, spade lug	Prep Area - Bench 1	0	
Adhesive mylar foam covers	Compactus - 6-1	10	sheet 10
Airtrack	Physics Store - bench	1	
Airtrack accessories	Physics Store - 15	1	box
Algicide	Prep Area - 06	1	bottle
Alternative energy [kit]	Physics Store - 06, floor	1	kit
Alternator [model]	S4 -	0	
Ammeter, 0-1 and 0-5 amp range	Physics Store - floor, 25	12	
Ammeter, 0-10 amp range	Physics Store - floor, 25	3	
Ammeter, AC, 0-5 amp range	Physics Store - floor, 25	4	
Ammeter, demo	S5 - display	4	
Ammeter, industrial	Physics Store - display	2	
Ammonia test strips	Prep Area - 06	1	

Reports

Stock Lists ▸	Stock-Full List-In Locations
Stock Value ▸	Stock-Full List-Total Quantities
Incomplete Orders	Stock with No Location
Expenditure	Stock in a Location ...
Disciplines	Unavailable Stock
Categories	
Suppliers	
Locations	
Chemical ▸	
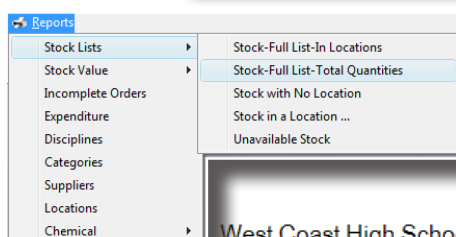
West Coast High School

Full Stock List with Total Quantities

Item	Ideal Qty	Unit
Acacia seed (wattle)	1	pkt
Acceleration sensor 2-axis	1	
Acids & bases Yr 9 [prac]	2	
Acids & bases Yr 9 homework [prac]	50	
Acrylic square	0	
Adaptor, spade lug	0	
Adhesive mylar foam covers	10	sheet 10
Airtrack	1	
Airtrack accessories	1	box
Algicide	1	bottle
Alternative energy [kit]	1	kit
Alternator [model]	0	
Aluminium potassium sulphate	0	
Ammeter, 0-1 and 0-5 amp range	12	
Ammeter, 0-10 amp range	3	
Ammeter, AC, 0-5 amp range	4	
Ammeter, demo	4	
Ammeter, industrial	2	
Ammonia test strips	1	
Amoeba (prepared slide)	5	
Amoeba [chart]	3	chart
Anemometer, cup type, hand held	2	

Stock with no Location

In SciList, if a master item has no location then it is not considered as actual stock on hand. The above report can show you items to which you need to give a location or that may need to be deleted.

Stock in a particular location

From this window, select a particular location in the left hand list.

Then print the list ordered by either name or by sub-location (below)

Reports
Stock Lists	▶	Stock-Full List-In Locations
Stock Value	▶	Stock-Full List-Total Quantities
Incomplete Orders		Stock with No Location
Expenditure		Stock in a Location ...
Disciplines		Unavailable Stock
Categories		
Suppliers		
Locations		
Chemical	▶	

West Coast High School

Unavailable Stock

Item	Location	Total Qty	Unavai Qty	Unit
Balance, digital, 0.01g	Prep Area - Balance	1	1	
Inaccurate by 13g, cannot be calibrated. Useful for before and after weighing.				
Camera, Canon Powershot	Compactus - 4-2	1	1	Unit
1246113480 Repaired 20/11/07 under warranty Betta Electrical. Sticking power button, lens cover jams. Rec. No. 1020875352				
Discharge tube, Maltese cross	Physics Store -	1	1	
Broken in building move, 2004				
Indirect evidence of atoms [prac]	Compactus - 5-1	2	1	
In Box of prac bits and pieces				
Radiation counter	Physics Store - 06	1	1	
not working.				
Sphygmomanometer, mercury	Chem Store - B10	1	1	
not working				

This report shows stock indicated as unavailable for use, perhaps because it is undergoing repair or service.

Stock Value Reports

You may print the value of stock either
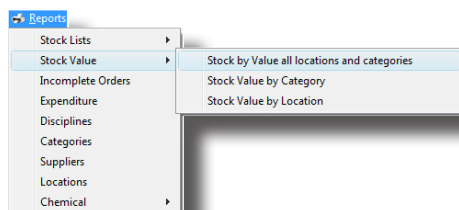
Overall
From a selected Category
From a selected Location.

All of them present you with this form in which to set your options:

Report stock by value

This utility will print a list of all items that are in stock and equal or exceed a specified value.

From all categories
From all locations

Print stock whose value is at least:

$ 200 (Whole dollars)

Based On
- Single Item Value   ○ Total Value

☐ Include Description
☐ Include Locations

Print

West Coast High School

Stock of value at least $ 200   based on Unit Value
    From all categories   From all locations

Item	Quantity	Unit Value	Item Value
Acceleration sensor 2-axis	1	221.70	221.70
Balance, digital SK-5001	2	245.00	490.00
Camera, Canon powershot	1	373.95	373.95
Centrifuge, electric, 6 places	1	390.00	390.00
Colorimeter, datalogging	1	265.65	265.65
Crocodile physics [software]	1	1,562.40	1,562.40
EKG sensor	1	316.80	316.80
Geiger counter, digital	1	490.00	490.00
Human eye model, 3D working	1	487.68	487.68
Magnetic stirrer	5	200.00	1,000.00
Microscopes, stereo, HED-Deluxe	9	260.00	2,340.00
Oxygen gas sensor	1	419.44	419.44
Photonics electronics trainer	5	290.00	1,450.00
Sensor, dissolved oxygen	1	489.00	489.00
Skeleton [model]	1	580.00	580.00
		Total Value:	10,876.62

Chapter 4

Stocktake Activities

Stocktake Overview

SciList won't actually count or enter stock levels for you, but that's about all it won't do. It will work out shortfalls and write the orders. You will know exactly where all that new stock needs to go when it arrives.

Stocktake Logic

Stock in any location has an ideal (or expected) quantity.

Over a period of time, stock may be lost due to wastage, theft, or usage. Stock can be gained due to new orders coming in. At stocktake, you print lists of ideal quantities and check them against actual levels. Apart from overall gains or losses, stock may also have been shifted from one location to another. You enter the actual quantities found in each location.

SciList will provide a list of imbalances that you can act on in several ways:

• If stocktake quantities are unbalanced between locations (they may have been put back in the wrong spot) you can move them.

• If stocktake levels are higher than the ideal, e.g. from new orders, then reset the ideal up to the new level, or add them to your spares.

• If stocktake quantities are low, either accept it and reset your ideal levels, or produce orders to make up shortfalls.

Stocktake Steps

Stocktake is controlled by working through the steps on the Stocktake window.

You can work through the stocktake steps to:
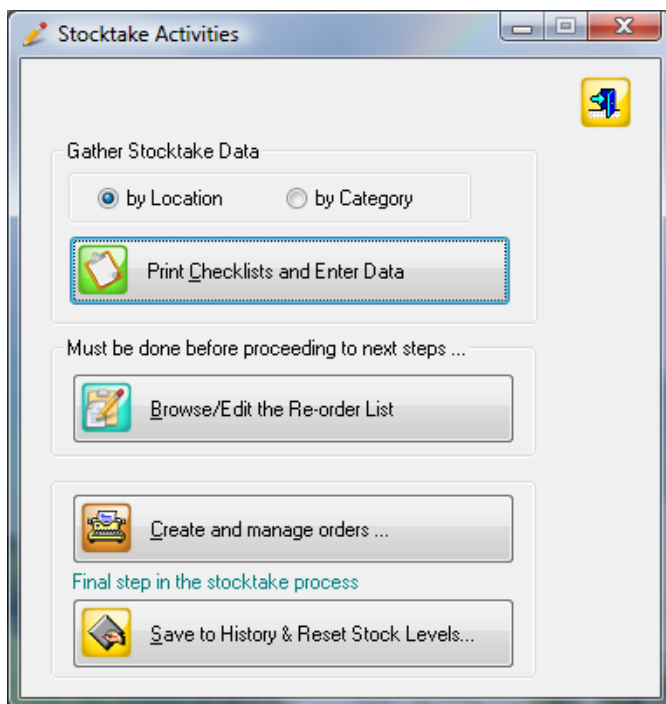
• produce stock checklists for locations or categories

• enter stock counts

• produce a list of items out of balance

• write orders to suppliers for items in shortfall

• save a history of each stocktake

Except for the first step, 'Browse/Print Stocktake Checklists', each step depends on the previous one for information so:

Move through the stocktake module step by step.

Preparing for Stocktake

The degree to which SciList will manage your stocktake depends upon how much detail you have included in your data.

Locations and Sub-Locations

These are required to produce checklists for specific locations,

Categories

required on items to produce checklists by category
e.g. 'consumables', 'glassware'

Ideal quantities on stock items

To recognise imbalances SciList needs this information on expected stock levels.

Supplier

SciList will print a list of items to be re-ordered. This is better if SciList knows things like **supplier**, **product code** or **price.** These details will be added automatically from the Purchase Orders module if an item has a purchase history.

Stocktake Size

You do not need to stocktake all items at once. You may undertake limited ones every term and major ones each year or whatever suits.

Major stocktake - print stock checklists for sub-locations in every location, allowing stocktaking to be dealt with one Location at a time. e.g. one or more rooms with all shelves.

Minor stocktake – print stock checklists for one or more specific sub-locations or locations, e.g. classrooms or, print a stocktake checklist for a category such as consumables or chemicals.

After recording your stocktake results, SciList will tally numbers of an item in different locations, compare this total to full quantity (ideal) stock levels and build a purchases order list organised by supplier, with product code and price (if available).

Stocktake Detailed Guide

The first step in a stocktake is to record how much of each item you have in stock (after tidying up and putting away).

Start by printing a checklist to take to the relevant locations
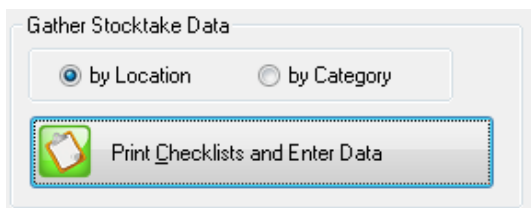
1. Print a checklist...

You can choose by location or by category depending on which button is checked.

By Location:
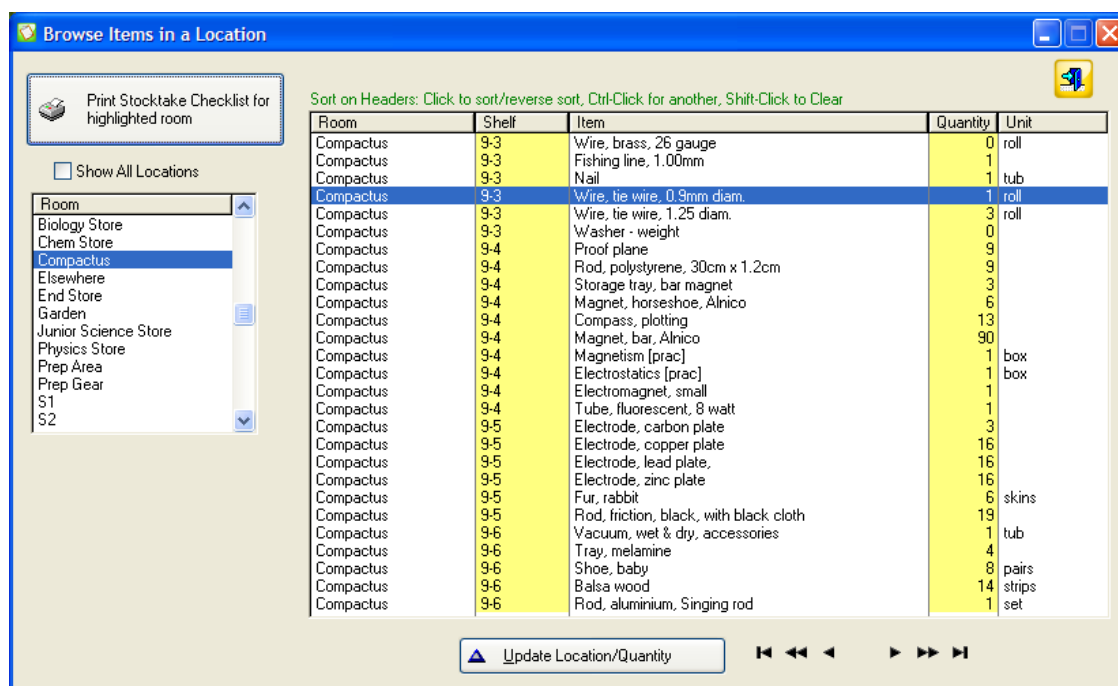
Highlight a single location at left, then click the print button.

Stock Items by Location   Compactus

Location	Item	Quantity		Unit
	Physics prac equipment [kit]	1		box
	Thermometer clips	13		
0-3	Globe, light box, spare	0		
03	Paper clip giant 50mm	6		box 100
03	Joggle eyes	5		pkt
07	Plasmodium falciparu, [prepared slide]	1		
07	Fasciola hepatica Cercariae [prepared slide]	1		
07	Taenia pisiformis, proglottid [prepared slide]	1		
1-1	Cotton wool	2		packet
1-1	Information night [kit]	1		
1-1	Materials, various	1		box

This report can run to many pages.

By Category:
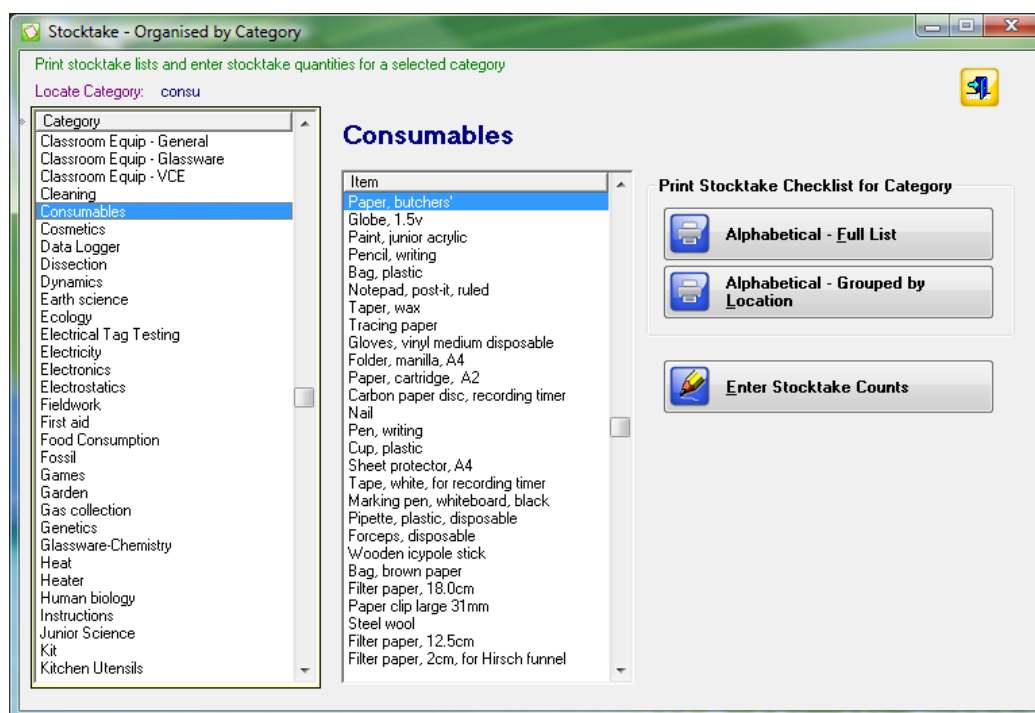
For stocktake purposes, the report **Grouped by Location** is usually the best. It's easier to enter the data and the sheet matches the data entry window in SciList (next page)

West Coast High School

Items by selected Category: **Consumables**

Item	Location	Quantities		Unit
Tape, adhesive, office (cellulose)	Biology Store 03	2		rolls
Paper clip large 31mm	Biology Store 04	1		box 100
Tape, masking, adhesive	Biology Store 04	2		rolls
Chalk, coloured	CS A1	1		box
Food colouring, Queen, blue	CS A1	20		ml
Food colouring, Queen, green	CS A1	20		ml
Food colouring, Queen, red	CS A1	50		ml
Food colouring, Queen, yellow	CS A1	20		ml
Perfume	CS A1-Ess-Oil	1		bottles
Bleach powder, hair care	CS C Floor 1	250		g
Creme peroxide for hair	CS C Floor 1	370		mL
Indicator paper pH 1-11	CS C21	3		roll
Indicator paper, full range pH 1-14	CS C21	3		roll
coconut oil	Chem Store A1-Ess-Oil	20		g
Bath and shower gel	Chem Store C Floor 1	50		mL
Cleansing lotion	Chem Store C Floor 1	50		mL
Hair conditioner	Chem Store C Floor 1	70		mL
Hair dye	Chem Store C Floor 1	2		
Hair shampoo	Chem Store C Floor 1	50		mL
Hair, human	Chem Store C Floor 1	40		grams
Handcream	Chem Store C Floor 1	50		ml
Lipstick	Chem Store C Floor 1	1		tube

2. Record stock levels on your sheets

Go off and do the stock take.

3. Enter Stocktake counts into SciList

Only record the changes

This browse displays all stock and allows you to update the stock levels.

Either or both of these buttons will appear on the right hand side of the browse table if the selected item has a purchase history, or if it is a chemical that has had prior stock levels recorded. In either case you may view the history for that item

There are two ways to enter your stock countsa, depending upon whether the checkbox **Use Update Form** is checked or not.
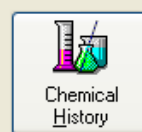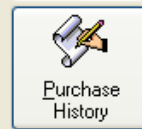
Use Update Form Unticked

This allows you to edit Stocktake Quantity directly on the line.
Edit the stocktake quantity if the stock count on your checklist is different from the full-stock (ideal) number.

(see page 17 for edit-in-place key guide)

Update Form Ticked

This allows for more detailed changes..

- add, delete and change locations for an item

- change sub-locations, e.g. if you have moved or want to move the item to a different shelf

- insert new items, if you come across equipment you have not previously entered into the database

- alter full stock (ideal) quantities

- add a comment

The Update Form

Use either of the above methods to enter your stock counts.

4. Browse the Re-order List
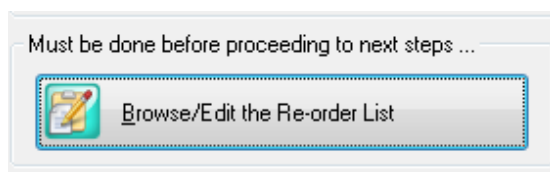
Each time you hit this button, SciList compares your stocktake quantities with ideal (full stock) quantities and re-creates this re-order list if there is a shortfall or discrepancy. This means it can take time to open, because it is built fresh on each occasion.

If an item in one location is not in balance, then **all** locations of that item are displayed. This assists with your overview, and enables you to re-arrange quantities between locations.

If you decide that you are not going to re-order an item, you need to set your ideal to equal the stocktake quantity. Then click Save. That removes any discrepancy and the item will disappear from this list.

N.B. Chemicals are displayed only if the stocktake quantity is lower than the Trigger Level for that chemical. Trigger level will show under the heading 'Ideal' in the above table.

Accept Button   - Saves your changes and exits
Save Button   - Saves, refreshes the screen and remains for further editing
Cancel

What you do with the re-order list.

Check that you agree with SciList's numbers. Check through the re-order list for items which have registered a short-fall but which you do not actually want to buy.

Perhaps an item is found to be below the Ideal Quantity but you don't want to replace it. In this case you would change the ideal quantity to reflect current quantities.

Check the item names – is there anything there you do not intend to re-order? E.g. perhaps you are a bit short of an item but not enough to buy more. You may need to go back to 'Enter Stocktake Counts' and make adjustments either to location or quantities. (If so click Accept if you have made any changes)

Items which you allow to remain on the re-order list will have orders prepared for them. You do not, of course, need to act on those orders.

Look through the quantity columns, particularly the 're-order' amount. Does it make sense to you? Again, go back and adjust any anomalies.

Note the 'Excess' quantity column. Although 500 ml beakers are down by six in S1 and seven in S5, a total of 13 beakers, there are two more than required in S3, shown as 'excess'. When SciList prepares the order form, it will deduct those two, and order 11 beakers.

The list provides a record of where items can be relocated from to make up numbers at a location with a shortfall.

Print the re-order list, either in full or by sub-location

• as an aid to putting away your new equipment when it arrives
• as an hard-copy record of your stocktake

West Coast High School
Restock Items List

Item	Location	Ideal	Stocktake	Re-Order	Excess	Unit
Beaker, 1000ml, glass	Prep Area spares	5	5	0	0	
Hole punch, 2-hole	S1 Desk	1	0	1	0	
Tape, adhesive, dispenser	S1 Desk	1	1	0	0	
Tape, adhesive, office (cellulose)	S1 Desk	1	1	0	0	rolls
Scissors, office	S1 Desk	13	7	6	0	Unit
Spray bottle, meths solution	S1 Desk	1	1	0	0	

Stocktake Re-Order List   Report Date: 2/09/2007

Item	Location	Ideal	Stocktake	Re-Order	Excess	Unit
Acacia seed (wattle)	Compactus 7-2	1	1	0	0	pkt
Acacia seed (wattle)	Biology Store	2	1	1	0	pkt
Acacia seed (wattle)	Elsewhere	2	2	0	0	pkt
Beaker, 1000ml, glass	S2	2	2	0	0	
Beaker, 1000ml, glass	S3	13	10	3	0	
Beaker, 1000ml, glass	Prep Area Bench 2	2	2	0	0	

Select 'Accept' when you are happy with everything on the re-order list and proceed to the next step.

5. Create Orders from the Stocktake module

For each item listed for re-order, SciList searches the purchase history file, and assigns the item to an order for the last named supplier. It also shows the price and quantity last ordered.

If an item has no purchase history, it will be assigned to a 'Supplier not known' group of items.

Click 'Create and Manage Orders'

then click on 'Write Orders'

SciList analyses the re-order list and creates a set of orders. If a purchase history exists, SciList will assume the same supplier.

Click 'Manage Orders' to view and work with your orders.

Automatically generated orders
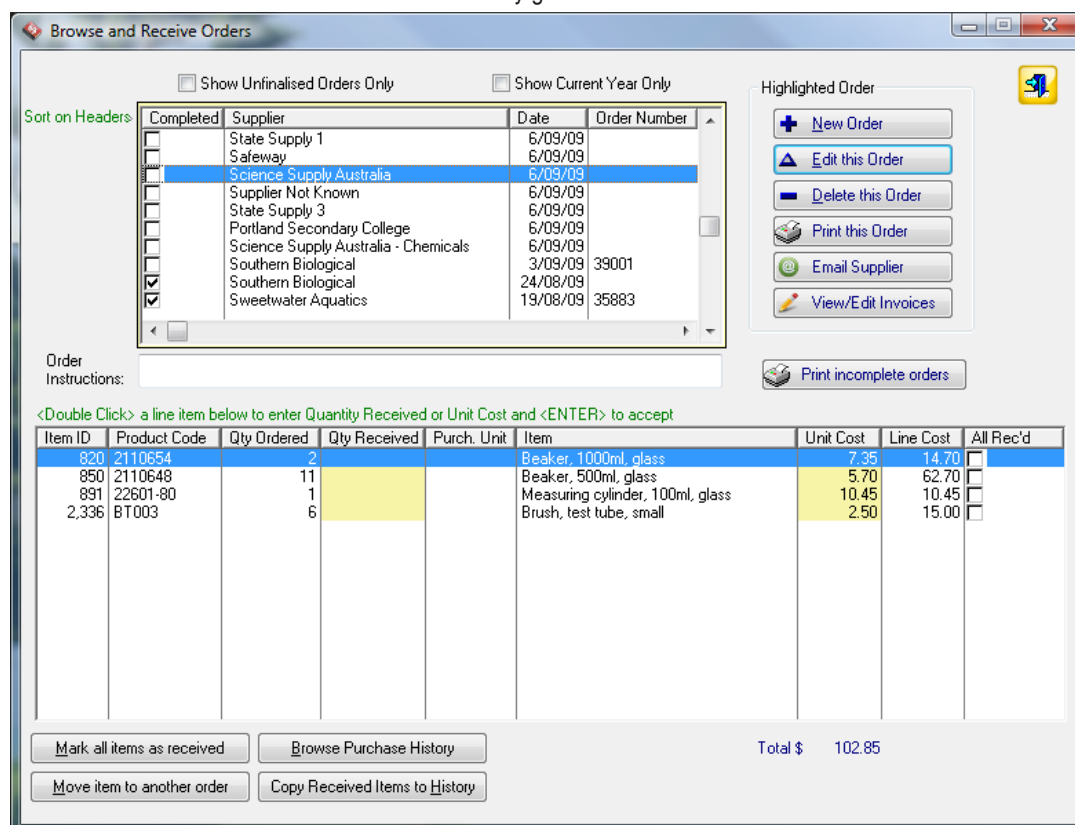
The following discussion applies to orders automatically generated by the Stocktake Module. For full instructions on using the Purchase Orders Module see the next chapter

The orders generated by the stocktake will be assigned the date of their creation. (6/09/09 in the example)

The quantity being ordered is the stock shortfall identified in your stock take.

Editing orders generated from Stocktake Module

Items without a supplier (i.e. Supplier not known) may need to be transferred to another order or you may change the Supplier name on the order to an actual supplier.

You can transfer items from one order to another by highlighting the item and clicking on 'Move item to another order'.

To edit order details, highlight the order name, and click on '**Edit Order**'.

Typically you might need to:

- Change the supplier
- Insert your order number
- Enter or change product code
- Enter or change unit price
- Enter or change unit

The Item ID is the SciList's internal code attached to each master item in the database. Do not alter it unless you are looking up another item.

Note that all prices in SciList should be ex-GST

When orders are correct, you may print them.

A full discussion of orders is in the next chapter.

6. Save and Reset Stock Levels

Click on the final button in the sequence
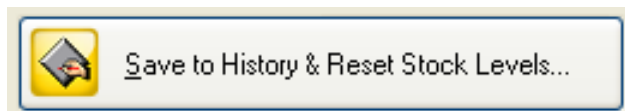
You do not have to wait until orders are received to do this.

Enter a name for the stocktake.

Click 'Archive Re-order List and Reset stock levels'

You will receive this message

Click 'Yes'

This will change all stocktake quantities to be the same as full stock (ideal) quantities except for chemicals. Make sure you have finalised your purchase orders before you take this step.

If a chemical was measured to be over the trigger level, that value is retained. If a chemical was measured as below the trigger level, that value is reset to the trigger level. See Chapter 6 Chemicals for full discussion of stocktake.

Stocktake Archive

From the menu bar:
Stocktake > Stocktake Archive

This displays the results of your current stocktake and any previous ones, so you can refer to them anytime.

You can delete archive files you no longer want .

You can print them. This data is the same as your re-order list from Step 4.

West Coast High School
Stocktake History
full stocktake dec 2007 15 DEC 07

Item	Location	Ideal	Stocktake	Re-Order	Excess	Unit
Ammonia test strips	Prep Area 06	1	0	1	0	
Ball, golf	Compactus 5-5	12	11	1	0	
Ball, plastic	Compactus 5-5	12	6	6	0	
Ball, solid rubber	Compactus 5-5	12	0	12	0	
Ball, table tennis		2	2	0	0	
Ball, table tennis	Compactus 5-5	12	7	5	0	
Ball, tennis	Compactus 5-5	18	12	6	0	
Balloon	Compactus 1-4	2	0	2	0	pkt
Balloon	Compactus 3-3	2	1	1	0	pkt
Bandaid	Prep Area Balance	1	0	1	0	Pkt
Bandaid	Compactus 3-2	1	1	0	0	Pkt
Bandaid	Junior Science Store 03	1	1	0	0	Pkt
Bead, brown	Compactus 6-3	1	0	1	0	jar
Bead, green	Compactus 6-3	1	0	1	0	jar
Beaker, 1000ml, glass	Prep Area spares	5	4	1	0	
Beaker, 1000ml, glass	S2 Shelf	2	2	0	0	
Beaker, 1000ml, glass	S3 VCE	13	13	0	0	
Beaker, 1000ml, glass	Prep Area Bench 2	2	2	0	0	
Beaker, 100ml, glass	S1 Shelf	13	13	0	0	
Beaker, 100ml, glass	S2 Shelf	13	13	0	0	

Chapter 5

Purchase Orders

Purchase Orders

Orders may be created manually or produced automatically via a stocktake.

This button goes directly to the order window.

The Top section...

- lists your orders.
- shows the suppliers, date it was created, and your purchase order number if known.

The most recent orders appear at the top, but you may sort the orders on any column – date, completed, supplier, and order number.

You can **insert** new orders, **delete** and **edit** orders, **print** orders, directly **email** any supplier with an email address, and enter **invoice details**

The Lower Section...

- Displays all line items for the highlighted order
- When orders arrive, the **quantity received** can be entered, and unit cost may be changed to match the invoice.
- Allows received items to be **copied to purchase history.**
- Allows a **line item to be moved** to another order.

Creating a new order

Click 'New Order' on the previous window.

Fill in the:

• Date
• Order number (optional)
• Supplier (required)

Click the ellipses ... button to look up a list of suppliers.

If the supplier has a web page the web link will take you there.

Any special instructions to the supplier relating to the order go here.

To enter line items click the '**Insert**' button

A blank line appears in the lower section.

• For items in the master item list (that is most items)

Click on the ellipsis (...) and **select** a master item.

This fills in the **Item ID**

Press <TAB> to move across columns
In this example, a purchase history for this item existed so the **product code** and **price** were filled in.

If the item is not in the master file, but needs to be, use the **Insert** button in the lookup table to enter its details and then select it.

(continued next page)

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Description and **Unit** will be filled from the master file, but you may edit these if you wish.

Product code and **unit cost** will show automatically if you have previously ordered the item from this supplier and saved it to history. Otherwise enter the product code and cost from a catalogue or web site.

The default **Quantity** is 1. Change as necessary.

Press <ENTER> to accept any line.

If your ordered item is not in the master file and doesn't need to be:

Item ID	Pr. Code	Qty	Unit	Description	Unit Cost
223		1		Solar cell	34.50
0		5	Pkt	Tooth picks	1.25

Insert a new item
Click on Description and type it in yourself
Fill in other columns

Item ID will be 0, but that is OK. It means it is not in your master list.

Information Window

Reminds you about the above, and keyboard shortcuts.

Help on Ordering

If an item is in the Master List (or needs to be)...
Item ID is required. Click the ellipses button (...) to look up the item.
This will fill in Description and Unit and if a purchase history for that supplier exists, will fill in the Product Code and the last Unit Cost.
If the item is not in the master list, the lookup table allows you to Insert it, and then Select it.
All fields, including description, may be edited to suit.

If an item is not in the Master List (and doesn't need to be)...
Item ID must be 0
When you Insert a line item, Item ID is the selected field. Use the mouse to click on Description and then enter it. Fill in the other fields as required.

For any item...
You may edit line item description, product code, and unit cost to match the supplier's catalog.

Keyboard shortcuts...
<TAB> - next column   <SHIFT-TAB> - previous column
<ESC> - cancels all changes to a line item and exits Edit-In-Place
<ENTER> - accepts all changes to a line item and exits Edit-In-Place

Working with orders

To Edit an Order's Details and Line Items

Highlight the order you want to work with and click **Edit Order**.
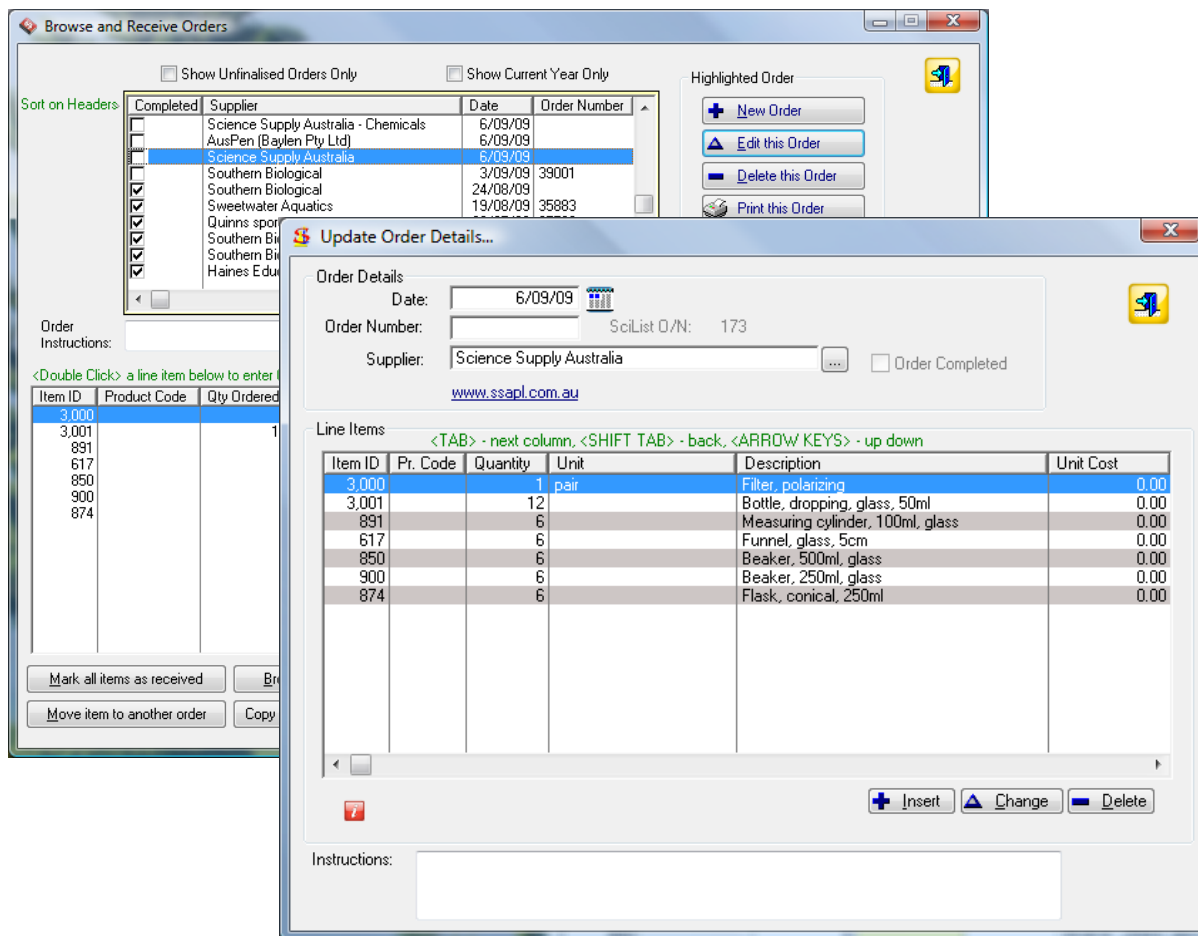
You may change any details.

The item description is initially the item name from your list of master items. You may edit the item name to be more appropriate for your order. This will not change the item name in the database.

Click the Exit button to accept the details of the order. Clicking Cancel (the Red X) will undo changes you may have made to Date, Order Number or Supplier. It will not undo changes to line items. They need to be edited separately.

Printing Orders

When your order is completed, you can print it.
All reports print to screen

Saving as .pdf Acrobat Reader file

If you wish to email your order, you should save it as a .pdf file.
From the report preview window above, select File > Save As... and select .PDF
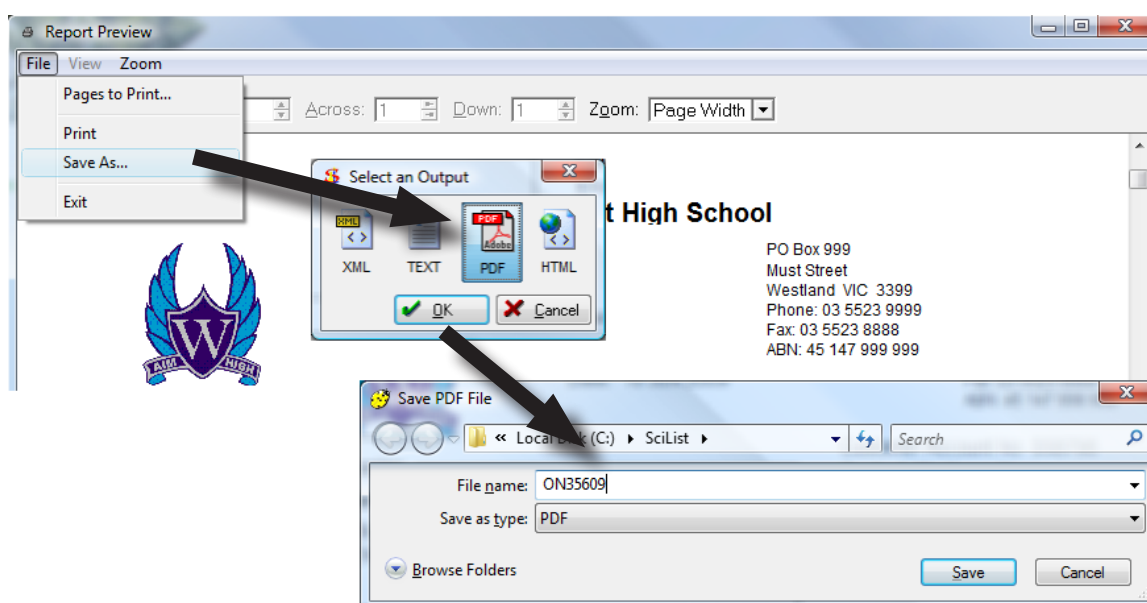
Save it with a logical name. Save it into the SciList folder, or better perhaps, you could have a sub-folder for .pdf files.

Attaching an Order to an Email

On the Orders window, the Email button will activate if an email address exists for that supplier.
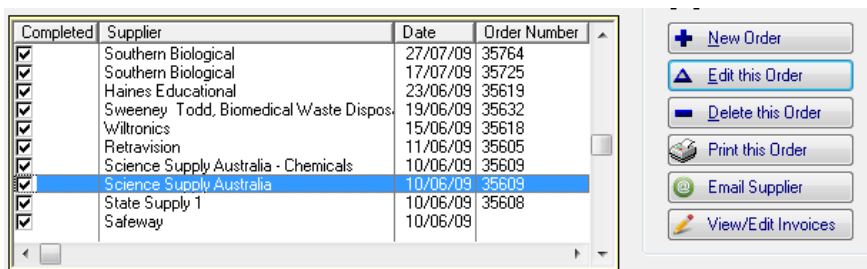
Click Email Supplier

Enter Subject

Enter a message

The contact details are entered automatically, but you can edit them.

Use the ellipses button to select your attachment

Click send when ready

A copy of the email is usually saved. These can be viewed from the Purchase Orders Menu.
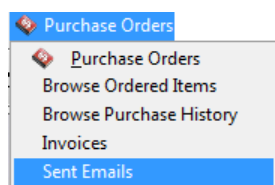
Other options from the orders window

Browse the purchase history of an item

Use the button below the order

Filtering the list of Orders

Notice the two check boxes at the top of the window. This will restrict your view to this unfinalised orders or this year's (or both)

Transferring an item to another order.

You can transfer items from one order to another by highlighting the item and clicking on 'Move item to another order'

A list of unfinalised orders is displayed.

Highlight the new order and click Accept

The product code will automatically be changed to that of the new supplier if SciList can find it in the purchase history. If not found, the product code is left blank.

View the item under new order to check its details.

Finalising an order

When an order arrives it may be complete or incomplete

If an order is complete

Click 'Mark all items as received'

This sets the Quantity Received = Quantity Ordered and ticks All Received on each line item.

Click 'Copy Received Items to History' after line items are flagged as fully received. If all line items have been received, the order is then flagged as Completed in the top section.

If an order is not fully complete

Enter the quantities actually received on each line item.

The order will remain unfinalised until every line item is fully received

Recording Invoices

If you record invoices, the details
- will show in the Expenditure Report
- be included in the Incomplete Orders Report

This assists you in keeping overall track of orders and expenditure

When you receive any invoice for fully or partly received orders:
Highlight the order and click View/Edit Invoices

Click Insert

Enter details of the invoice and press OK and the invoice is recorded.

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Copy received items to history.

Copy Received Items to History

This will enter the item's order details (product code, price, quantity) into

the purchase history for that item.

Click 'Copy received items to history'

As items are written to history, any changes to the price for that supplier will prompt the question shown above. Usually you will click Yes

It doesn't matter how many times you click 'Copy received items to history' because any item will only be entered once. You may do this a few items at a time or after the entire order has been filled.

Order Completion

Once all the items on the order have been

- marked as received
- copied to purchase history

the order will be automatically be flagged as Completed'.

It is up to you to decide if you delete orders after they are complete. You may find it useful to retain them for a time.

Other utilities associated with Orders

Print Incomplete Orders
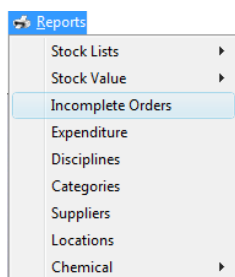
Reports > Incomplete Orders

This report shows the details of any incomplete order as well as any invoices received (e.g. in last line below)

West Coast High School
Incomplete orders prior to September 30, 2009

Date	Order Number	Supplier		Shortfall	
31/01/07	31346	Livingstone School Supplies			
		Test tube, 20 x 150mm, glass	422120115	1	
		Evaporating basin, 650ml	C-67	1	
28/06/07	32277	State Supply 1			
		Folder, ringbinder, A4	1064274	6	
6/09/09		State Supply 1			
		Paper towel roll	1904639	1	carton
		Pencil, writing	1474685	12	
		Folder, manilla, A4	1064924	1	box 100
		Wooden icypole stick	1224778	2	pkt
		Hole punch, 2-hole	1951106	1	
		Folder, Kwikzip, refills	35607	10	pkt 10
		Paper towel leaf	1288008	1	
		Brush, flask, tufted end	1970127	1	
6/09/09		Science Supply Australia			
		Beaker, 1000ml, glass	2110654	2	
		Beaker, 500ml, glass	2110648	11	
6/09/09	978656	State Supply 3			
		Marking pen, whiteboard, black	1092596	12	
		Folder, Kwikzip	1277871	12	
		Marking pen, whiteboard, red	1924559	12	
		Marking pen, whiteboard, blue	1100203	24	

Received Invoice(s): 1555 8/09/09

View the Line Items in all the Orders
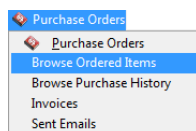
Purchase Orders > Browse Ordered Items

This shows all orders' line items in a single table. You can't alter them here.
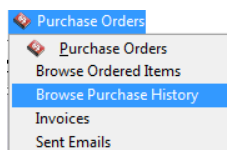Alterations are done through the Orders window

The table is useful to easily locate items not yet supplied and to get an overview of all orders.

Items with a tick have been received.

The table may be sorted on any combination of column, and can be filtered to hide received items.

Browse and Edit the full purchase history

Purchase Orders > Browse Purchase History

This shows all purchased items that have been copied to history and allow you to edit any aspect of them.
This table can be sorted by any column, or combination of columns.

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Browse Invoices

Purchase Orders > Invoices

View all invoices for a selected date range
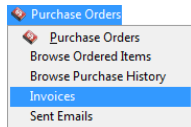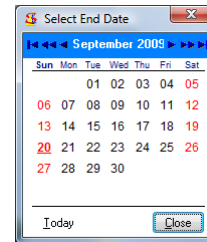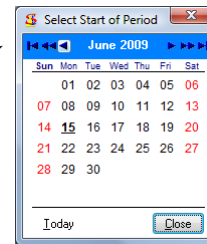
Print Expenditure

Reports | Stock Lists | Stock Value | Incomplete Orders | **Expenditure** | Disciplines | Categories | Suppliers | Locations | Chemical
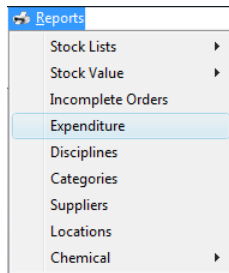
Reports on the Order amounts and Invoice amount for the selected date range

Print an Exenditure List

This utility prints orders between a selected date range along with the order amount and value of associated invoices.

Start Date: 9/06/09

End Date: 7/09/09

Print

West Coast High School
Expenditure 9/06/09 - 7/09/09

Date	Order No	Order Amount ($)	Invoiced ($)	Order Completed
6/09/09		217.84	0.00	☐
6/09/09		101.00	0.00	☒
6/09/09		102.85	0.00	☐
6/09/09	978656	212.16	212.16	☐
6/09/09		17,800.00	0.00	☐
6/09/09		0.00	0.00	☐
24/08/09		70.70	0.00	☒
19/08/09	35883	71.95	71.95	☒
29/07/09	35763	66.00	66.00	☒
27/07/09	35764	10.20	0.00	☒
17/07/09	35725	152.90	0.00	☒
23/06/09	35619	300.00	0.00	☒
19/06/09	35632	900.00	0.00	☒

Chapter 6

Chemicals

Introduction

Chemicals can be considered as stock in the same way as any other item of equipment, except that there are other issues involved with them, particularly safety.

Stocktaking also works in a slightly different way with chemicals.

SciList allows you to enter (or import) a variety of data such as a chemical's UN Hazard Code (for storage and transportation) and a CAS number (a unique identifier) and provides reports with this information.

SciList does not provide Material Safety Data Sheets (MSDS) because they are subject to regular updates and there is other software that provides this information.

You may choose not to use SciList for chemicals at all.

Many users will only add chemicals to SciList when re-ordering. This means that the commonly used chemicals will be in SciList, and purchasing histories will be accurate.

A complete list of chemicals is best entered by importing them if you have them in another computer format e.g. spreadsheet. See next chapter for details on import.

Activate Chemicals

Go to **File Menu > Setiings** and choose the **Chemical Options**

Activate **Recording Chemicals in SciList**
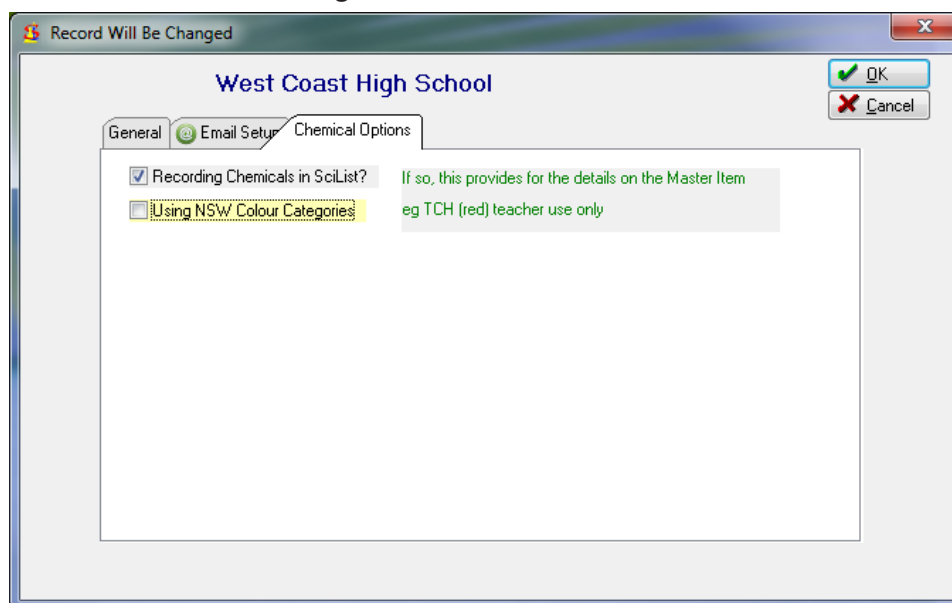
NSW Colour Categories

This scheme assigns a code and colour to chemicals used in schools.
TCH - Teacher only (Red), Year 11-12 use (Orange), 7-12 (Green), K-12 (Blue)
N-not recommended (Black) , PS - Professional Staff (no colour)

Entering a Chemical

Insert a Master Item and tick 'Is Chemical'

The General Tab

Is Chemical

Tick *Is Chemical* and the *Chemical Tab* will appear behind *General*

Unit

This unit should be what you would measure or count at stocktake, not the unit of puchase. For example, you may measure a liquid in mL or L, but purchase in a 5L bottle. Use ml or litres, not 5L bottle.

We suggest that you use g instead of kg and ml rather than litre because no decimal points will need to be entered.

Quantities

Are entered when you add chemicals to a location (shown further on in this chapter)

The Chemical Tab

All fields on this tab are optional.

Whether you use them or not depends wholly on what compliance guidelines you are required to follow.

(See next page for explanations)

CAS Number

Chemical Abstract Services number - a unique number for each chemical. You can find it from a label, data sheet, or internet query.

The last digit is a check digit so if a digit is entered incorrectly you will be advised with this message.
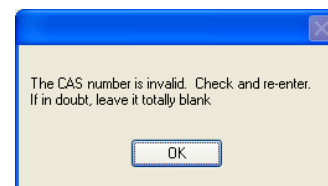
Dangerous Goods Details

UN Number - a 4 digit number.

Dangerous Goods have the potential to cause immediate harm to people, property and the environment due to the possibility of a fire, explosion, release of toxic, flammable, or corrosive materials during a storage or handling incident.

Not all chemicals have them, and some chemicals share the same code.

The DG Class (and sub-risk) may be selected from the lookup table (left) by clicking the the *ellipses* button to the right of the entry field.

SciList uses 0 for a stable chemical.
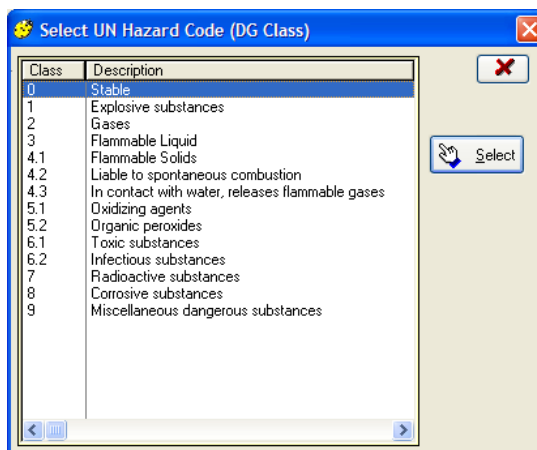
Is Hazardous

Yes, No, or blank

A hazardous material has a potential for harm to humans, even though the actual risk may be low.

Not to be confused with the UN Hazard codes for Dangerous Goods

A chemical can be Hazardous, but not Dangerous, or Dangerous but not Hazardous. For example, a compressed gas would be dangerous (due to its compression), but may not be hazardous (due to its chemical nature).

Amount

Enter the quantity and unit e.g. 5L

This is somtimes referred to as the Manifest Quantity. It is the quantity your full container(s) would hold - a theoretical maximum quantity.

In SciLIst it is only used for printing on the dangerous goods compliance sheet. No processing or calculations are done with this number.

Packing Group

Enter I II or III or leave it blank.

The Packing Group for a chemical indicates the degree of hazard associated with its transportation. The highest group is Group I (great danger); Group II is next (medium danger), while Group III chemicals present the lowest hazard (minor danger). Packing Groups are often shown on MSDS data sheets for chemicals under the heading "Transport Information".

MSDS Date

Enter a single year if you have a current MSDS sheet for the chemical e.g. 2007. Current MSDS sheets should be no older than 5 years.

Risk Assessment Date

Enter a single year if a Risk Assessment has been written for the chemical.

NSW Chemical Category

If this is activated (File > Settings) then the selection shows at the bottom of the window.

You may choose an option, or leave it blank.

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Placing a chemical in a location

After completing the master item details for a chemical, you will place it in one location or another.

Instead of Ideal Quantity, it will say Trigger Level

Trigger Level is the level that a quantity of chemical can fall to before it shows up for re-ordering on a stocktake. The total you would expect to have in stock is usually quite a bit higher.

This represents a different behaviour than ordinary items
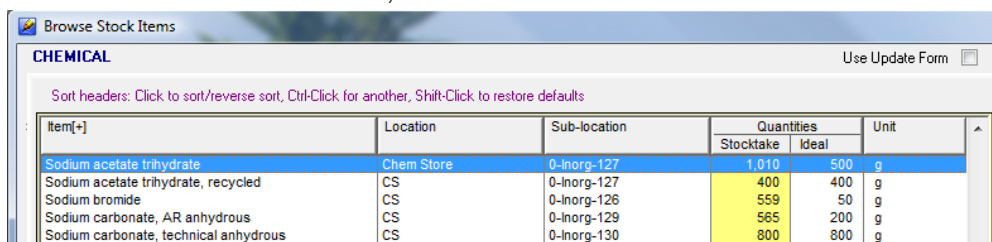
When you browse the chemical in the master list, QTY refers to the Trigger level, whereas the TOTAL QTY below refers to the total stocktake quantities.

Chemicals - stocktake considerations

In the stocktake window, record the actual amount of chemical in each location.

The Ideal column really means Trigger Level for a chemical

If you want to force an order to be written, change the trigger level. For example, trigger level for Sodium thiosulphate is 500g, and you have about 700g in stock, more than the trigger level so no order will be generated. You realise with the number of classes doing year 8 chemistry next year that this won't be enough, so change the trigger level to 1000g and 500g will be ordered.

Auto-generated chemical orders

The line items in a chemical re-order can look peculiar.

The universal indicator above is 400 ml below trigger level, so the quantity ordered is 400. However the unit price is based on a 500 ml bottle so the total cost is astronomical. Change the quantity ordered to 1 Bottle (Edit this Order button) and all will be correct.
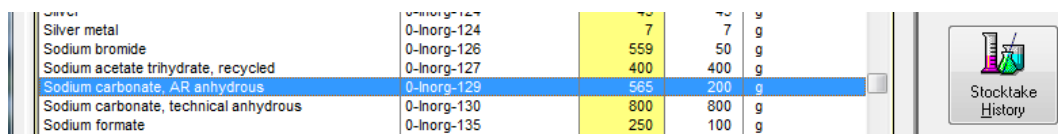
Save to History and Reset Stock Levels

This is the last step in the stock take process.

For ordinary items, the stocktake quantity is reset to the ideal.

For chemicals the stocktake quantity is retained, because it shows the actual quantities in stock.

Chemicals are saved additionally to a Chemical History file, so during subsequent stock takes, when you go to enter stocktake quantities, you can look up prior stocktake levels.

Chemical Reports

Reports > Chemical

Reports provided specifically for chemicals:

• a full alphabetical list

Reports menu:
- Stock Lists
- Stock Value
- Incomplete Orders
- Expenditure
- Disciplines
- Categories
- Suppliers
- Locations
- Chemical

Chemical submenu:
- Full List - Alphabetical
- Full List - By DG Class
- Chemical Register...
- Hazardous Substances

West Coast High School

Chemical List

Item	Hazard Code	CAS Number
Sodium pyrophosphate	0	
sodium silicate (sodium orthosilicate)	8	13472-30-5
Sodium silicate, solution (water glass)	0	
Sodium sulphate, anhydrous	0	7757-82-6
Sodium sulphite, anhydrous	0	
Sodium tetraborate, borax	0	1303-96-4
Sodium thiosulphate, pentahydrate, A.R.	0	10102-17-7
Sodium thiosulphate, pentahydrate, LR.	0	
Sodium thiosulphate, technical, anhydrous	0	
Sodium, sample	4.3	7440-23-5
solochrome black , eriochrome black indicator	0	1787-61-7
starch iodide papers	0	
starch,potato,non-reducing	0	
starch,soluble	0	
stearic acid	0	
stopcock grease	0	
Strontium carbonate	0	
Strontium chloride	0	10476-85-4

• by DG Class

West Coast High School

Chemical List - by Dangerous Goods Class

Item	CAS Number	MSDS	R.A.
DG Class: 3 Flammable Liquid			
Acetone (Propanone)	67-64-1	2008	
Butanol	71-36-3	2007	
Cyclohexane		2003	2005
Cyclohexene		2003	2005
Edicol blue FCF (acid dye)			
ethanol 70%	64-17-5	2006	
Ethanol 95%	64-17-5	2006	
Ethyl acetate	141-78-6	2006	
Eucalyptus oil	8000-48-4	2005	
Frother, M200		2005	
Hexane		2003	
iso-butanol (iso-butyl alcohol)	78-83-1	2007	
Iso-propanol	67-63-0	2007	
Kerosene	8008-20-6	2008	
Methanol	67-56-1	2005	
Methylated spirit	64-17-5	2006	

• Chemical Register

These are essentially the same report format, except how you filter the printout.

Print Chemical Register

All Chemicals	Print
All Dangerous Goods and Hazardous Substances	Print
Dangerous Goods whose MSDS Date is earlier than: 0000 (4 digit year YYYY)	Print

For Dangerous Goods based on MSDS date, you may select a date or leave as 0000 for all DG regardless of MSDS date

West Coast High School
Dangerous Goods and Hazardous Substances Register
7/09/2009

Item	Hazardous	Dangerous Goods UN No.	Class	Sub Risk	Packing Group	MSDS Date	Risk Assessment Date	Amount	Location
1,1,1,Trichloroethane	Yes	UN281	6.1		III	2008		450 ml	CS 6.1-Toxic-
Acetic acid, glacial	Yes	UN2789	8	3	II	2005		500 ml	CS 8-Corr-02
acetic anhydride	Yes	UN1715	8	3	II	2005		500 ml	CS 8-Corr-06
Acetone (Propanone)	Yes	UN1090	3		II	2008		400 ml	CS 3-Fl.Liq-01
Aluminium chloride, hydrated	Yes		0			2006	2005	750 g	CS 0-Inorg-003
Aluminium nitrate	Yes	UN1438	5.1		III	2007		500 g	CS 5.1-Oxid-01
Aluminium powder	Yes		4.3			2005		300 g	CS 4.3-Dg.Wet-01
Aluminium sulphate	Yes		0			2007		400 g	CS 9-Misc-05
ammonia 35%	Yes		8			2005		500 ml	CS 8-Corr-11
ammonia, cloudy, commercial			8						CS 8-Corr-11
Ammonia. conc. 25%	Yes	UN2672	8		III	2005		2500 ml	CS Bfloor1
Ammonium carbonate	Yes		0			2007		400 g	CS 0-Inorg-10
Ammonium chloride	Yes		0			2000		650 g	CS 0-Inorg-11
Ammonium dichromate	Yes	UN1439	5.1		II	2008		500 g	CS 5.1-Oxid-02
Ammonium ferrous sulphate	Yes		0			2008		500 g	CS C23
Ammonium molybdate	Yes		0			2005		75 g	CS C23
Ammonium nitrate	Yes		5.1			2001		500 g	CS 5.1-Oxid-03
Antimony, pieces, sample	Yes		6.1			2005		10 g	CS 6.1-Toxic-01
Arsenic, metallic, sample	Yes		6.1			2005		25 g	CS 6.1-Toxic-03
Barium chloride	Yes		6.1			2006		250 g	CS 6.1-Toxic-05
Barium hydroxide octohydrate	Yes	UN1564	6.1		III	2007	2007	500g	CS 6.1-Inorg-

Hazardous Substances
West Coast High School
7/09/2009

Item	Dangerous Goods UN No.	Class	Sub Risk	Packing Group	MSDS Date	Risk Assessment Date	Amount	Location
1,1,1,Trichloroethane	UN281	6.1		III	2008		450 ml	CS 6.1-Toxic-
Acetic acid, glacial	UN2789	8	3	II	2005		500 ml	CS 8-Corr-02
acetic anhydride	UN1715	8	3	II	2005		500 ml	CS 8-Corr-06
Acetone (Propanone)	UN1090	3		II	2008		400 ml	CS 3-Fl.Liq-01
Aluminium chloride, hydrated		0			2006	2005	750 g	CS 0-Inorg-003
Aluminium nitrate	UN1438	5.1		III	2007		500 g	CS 5.1-Oxid-01
Aluminium powder		4.3			2005		300 g	CS 4.3-Dg.Wet-01
Aluminium sulphate		0			2007		400 g	CS 9-Misc-05
ammonia 35%		8			2005		500 ml	CS 8-Corr-11
Ammonia. conc. 25%	UN2672	8		III	2005		2500 ml	CS Bfloor1
Ammonium carbonate		0			2007		400 g	CS 0-Inorg-10
Ammonium chloride		0			2000		650 g	CS 0-Inorg-11
Ammonium dichromate	UN1439	5.1		II	2008		500 g	CS 5.1-Oxid-02
Ammonium ferrous sulphate		0			2008		500 g	CS C23
Ammonium molybdate		0			2005		75 g	CS C23
Ammonium nitrate		5.1			2001		500 g	CS 5.1-Oxid-03
Antimony, pieces, sample		6.1			2005		10 g	CS 6.1-Toxic-01
Arsenic, metallic, sample		6.1			2005		25 g	CS 6.1-Toxic-03
Barium chloride		6.1			2006		250 g	CS 6.1-Toxic-05
Barium hydroxide octohydrate	UN1564	6.1		III	2007	2007	500g	CS 6.1-Inorg-
Barium nitrate	UN1446	5.1	6.1	II	2005		100 g	CS 5.1-Oxid-06

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Adding Chemicals to the category Chemical

Much of SciList's functionality comes from being able to categorise items with a Category. SciList provides this utility to assign all chemicals to the category Chemical.
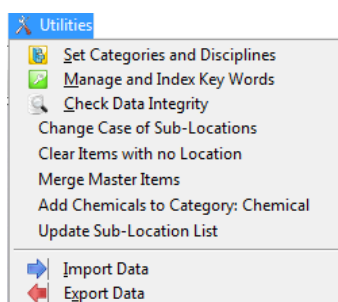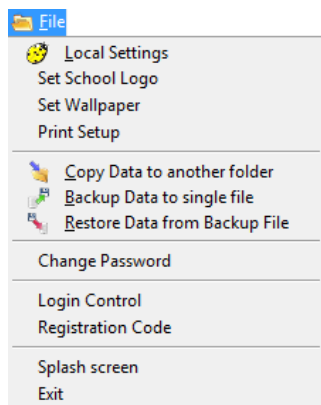
Utilities > Add Chemicals to Category: Chemical
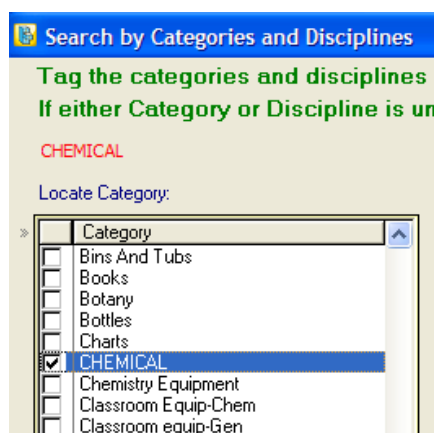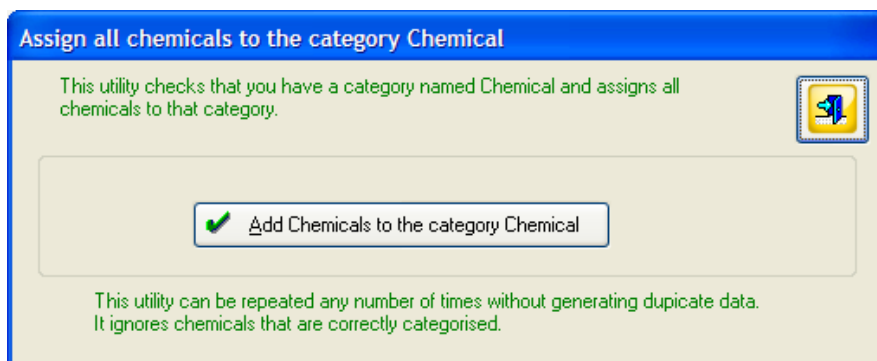
Once this is done, you may use the Search by Category and Discipline feature, to list all chemicals in their locations (left)

Chapter 7

General Utilities

General Utilities

From the Files and Utilities menus

Discussed below in no particular order

Check Data Integrity

Utilities > Check Data Integrity

This utility will go through your database, making sure that the data is logically connected. The usual reason it would not be is if a file is copied from another data location that doesn't match existing files.
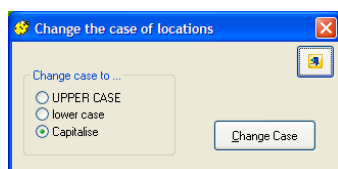
This utility will attempt to fix errors or inconsistencies and gives related messages.

Also when an update to SciList occurs, sometimes data fields need some form of update from earlier versions.

Use it any time you update, and otherwise just occasionally.

Change Case of Sub-Locations

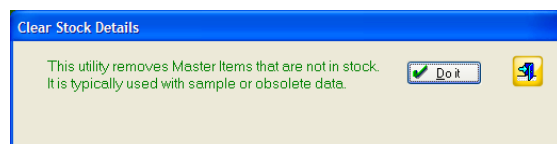**Utilities > Change case of sub-locations**

If you have imported your data or otherwise need it to be standardised. There are often many sub-locations and to do each one individually is tiresome.

You can change the format of all your locations into one of 3 formats.
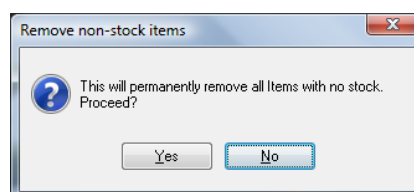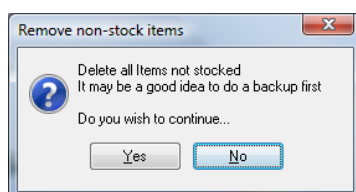ROOM 5, room 5, or Room 5

Clear Items with no Location

Utilities > Clear Items with no Location

Particularly when starting with a new data-base, many of the master items are un-related to your actual stock, so you may wish to get rid of them.

After clicking "Do It", you will receive two warning messages.

Do not do this unless you are quite sure that most or all of your master items have been given a location. If you accidentally lost a couple of items that you wanted to use, it's not a big deal, but if you lost 800, it is a problem.

Do a backup of your data first to be safe

If you answer 'Yes' to both the warnings, the process will take a certain amount of time to check the data. On a network it could be a couple of minutes.

When complete, a message is displayed:
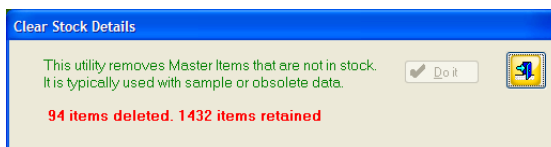

Merge Master Items

Utilities > Merge Master Items

Sometimes you have two master items that are really the same thing. Each may have their own related stock, but they are really one item.

This utility allows you to merge both items into the one.

In the screen shot above, Aluminium Sulphide is highlighted on the left as the item we want to keep, and Aluminium Sulfide highlighted on the right as the item we don't want.

After moving all stock from Sulfide to Sulphide, the Sulfide reference is deleted altogether.
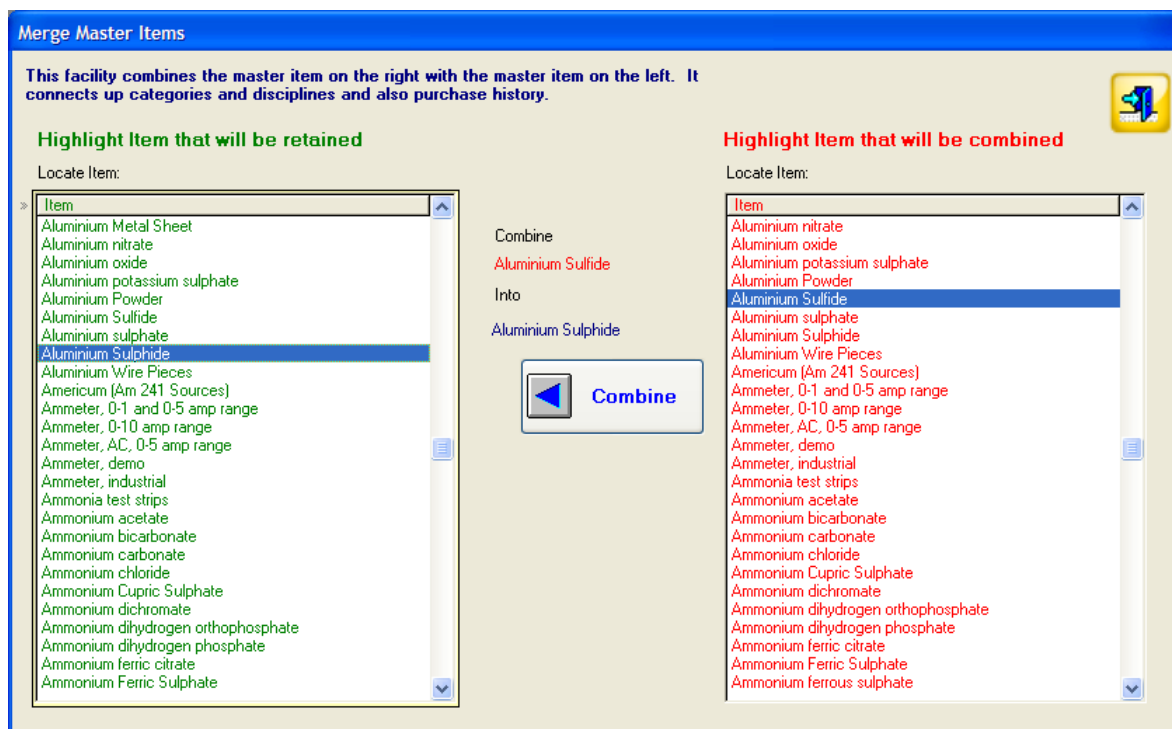
Local Settings

Utilities > Local Settings
Enter all SciList owner details, contact details including email address.

© CaRob Computing

Add chemicals to category: Chemical

Utilities > Add chemicals to category: Chemical

A convenient way to add all chemicals to a category called Chemical. If category Chemical does not exist it is created.

Data Backup

File > Copy Data to another folder

This option allows you to copy all data files as well as your program files to another folder. If that folder is on another computer altogether it becomes a very useful backup. You can run SciList from that other folder if you have backup up program files as well.

Your data consists of the data files in the SciList folder and images in the Images folder.

Data files are identified by the extension .tps

The backup process copies all .tps files to your selected backup location. It makes an images folder, and copies into it all images referenced from SciList. These images include all item images, wallpaper and organisation logo.

The result is a complete image of all of your data.

It is best to copy the data to a network location that gets backed up by system backups, so if you have one, talk to your network manager.

The backup window
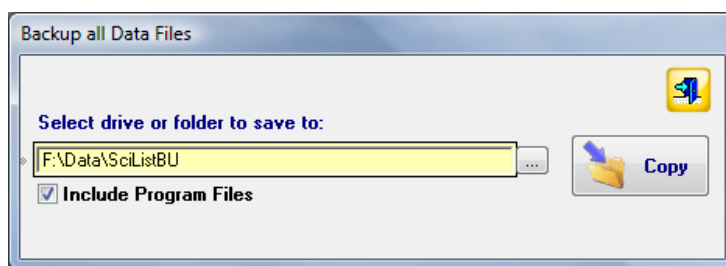
Use the ellipses (...) to lookup a folder and create one if you need

After selecting the destination, click the Copy button

You should really back your data up to a separate drive on a network in case of your own hard drive failing.

To restore data

Use windows explorer to copy files from your back up location to the SciList folder and the images folder.

Another option for back up and restore

File > Backup Data to a single file

This method of backup saves all the data files into a single file in your SciList folder.

Advantages

It is very convenient to restore from.

If you have to send your data to another person, you can attach that single file to an email or put it on a memory stick.

You can save any number of separate backup files because they all have different names.

If you are about to make some changes to the database, like import a batch of chemicals or other items, you can use this option so you have a recovery position in case your data gets mangled by the import.

Disadvantage as a backup

The file is saved in the SciList folder so if that hard drive fails, you can't restore from it. You could of course copy that file to another computer.

It doesn't copy program files or images

The process
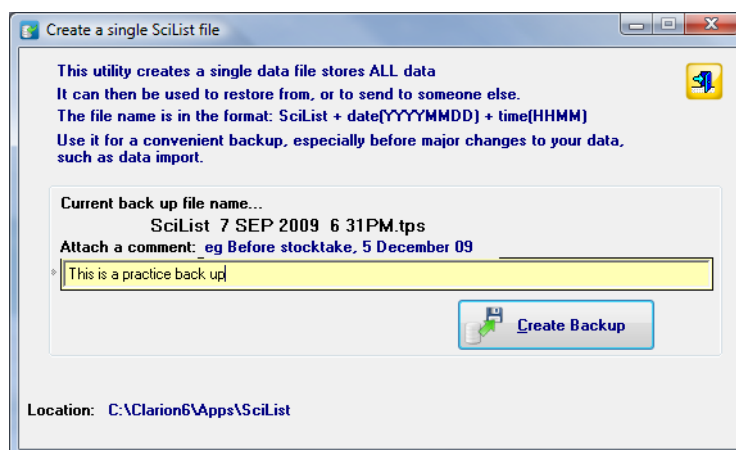
The data file created is named as shown in the window. A long name composed of 'SciList' plus the date and time.

You add a comment to the backup so you know later why you did it.
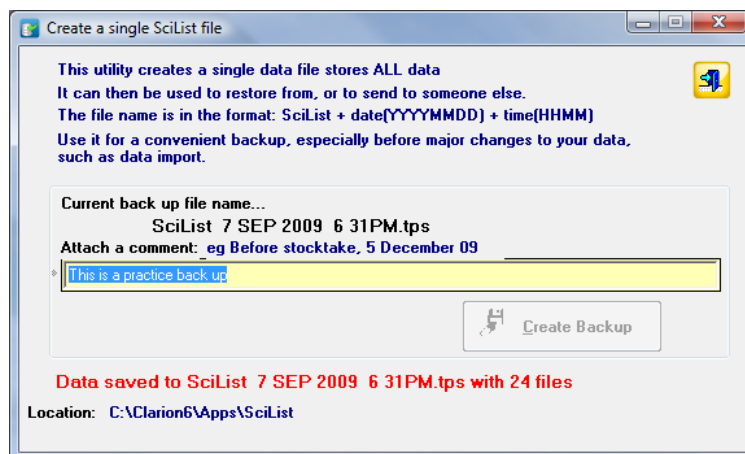
After clicking the Create Backup button, you are told how many files were saved.

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Restoring from the single file backup

File > Restore Data from Backup file
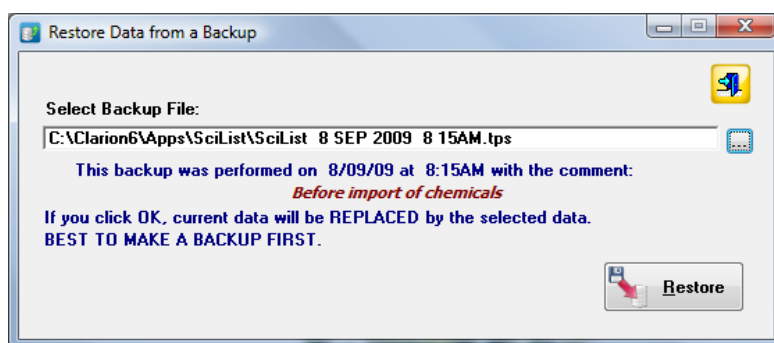
Use the ellipses button (...) to look up the saved file.
Click Restore
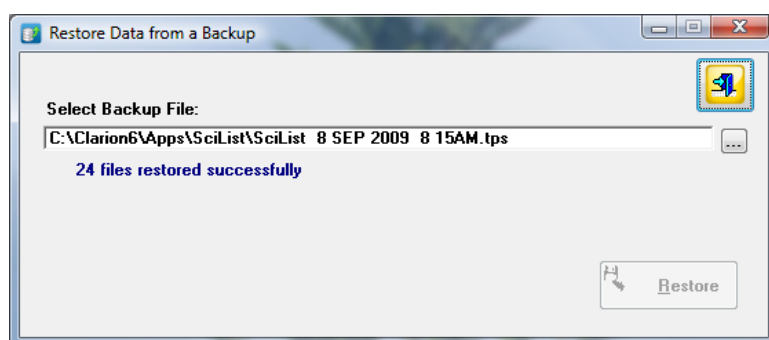
Setting the Organisation Logo

The logo is an image file that appears on reports. Importantly it appears on external documents such as Orders. It can be in any normal image format, .jpg, .gif, or .bmp.

File > Set Logo

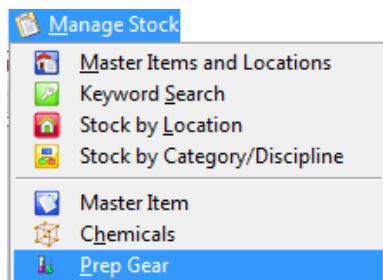When you look up the logo, using the ellipses button, the logo is copied into the SciList Images folder
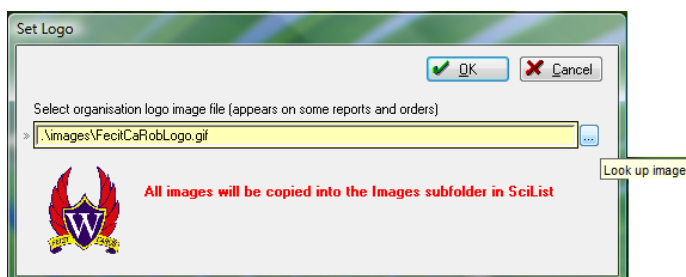
Setting the Wallpaper

File > Set Wallpaper

The wallpaper is cosmetic only and can be anything you find pleasing in a graphics format. Like the logo, when you select it from somewhere on your system, it is copied into the Images folder, where SciList will always expect to find it from then on.

Prep Gear

Master Items and Locations
Keyword Search
Stock by Location
Stock by Category/Discipline

Master Item
Chemicals
Prep Gear

Manage Stock > Prep Gear

Prep Gear is non-public equipment. You want to list it, but it is not for viewing by other staff. They don't need to know anything about it.

You may never use this utility. It is not part of the main database. The utility was requested by several lab assistants for their own convenience.

Browse Prep Gear or other Non-Public Equipment

Locate Item:

Item	Qty	Room	Location
Sink cleaners	1	Prep	Dr 2
Tape, book repair	1	Prep	office drawer 2

Comment: 1.8m Insert screw end into drain, twist to the right, moving cleaner back and forth at the same time. Bought Mt Gambier, about $10, Jan 06

Update Prep Gear...

Item: Sink cleaners
Room: Prep   Location: Dr 2   Quantity: 1
Comment: 1.8m Insert screw end into drain, twist to the right, moving cleaner back and forth at the same time. Bought Mt Gambier, about $10, Jan 06

Record will be Changed   OK   Cancel

The Update Form

Prep Gear or Non-Public Equipment

Report Date: 22/10/2007

Item	Qty	Room	Location
Sink cleaners	1	Prep	Dr 2

1.8m Insert screw end into drain, twist to the right, moving cleaner back and forth at the same time. Bought Mt Gambier, about $10, Jan 06

| **Tape, book repair** | 1 | Prep | office drawer 2 |

State Supply, 2227681, $10.01. Pritt , 72mm X 25M. Bought beg. 07. Use for affixing labels to solutions bottles, and any heavy duty protection of signs, labels, etc. Expensive, so use carefully.

The printed report of Prep Gear

Login Security and Access Control

If placed on a network server or if the SciList computer is used by different users, security needs to be considered.

SciList has an optional login feature that provides two functions
- Login Security - requires users to have a password to get in
- Access Control - Restricts what an average user can do in terms of editing data

When installed for the first time, these features are not activated because we assume SciList will be on a local drive with a limited number of users and consequently, fairly secure.

Activating Login Security

Access (or Login) Control is not activated when SciList is installed. Many users will not need it.

Access control is activated by the presence in the main SciList folder of the file **DSSW5.TPS.** If this file is present, anyone attempting to run SciList will be prompted for a login.

To Activate

With SciList closed, copy the file *dssw5.tps* from the *control* folder in SciList to the main SciList folder.

Run SciList. You will be prompted for a user name and password.
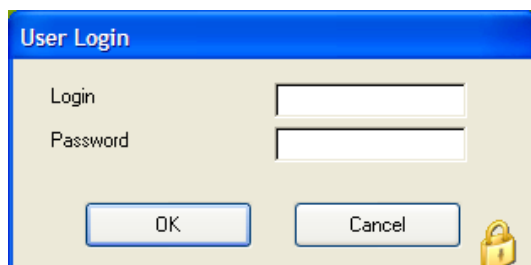
Log in as **Super**, password **super** for full access.

Logging in as **User**, password **user** gives browse rights and some print rights, but no editing rights.

The super user can add, delete and modify the functions other users can use. This is described in the subsequent pages.

A third user is provided in case access is required by CaRob Computing. Super is capable of deleting this user, but we request that you leave it.

Network Security

If placed in a network folder, do not rely totally on this security. Make sure that only legitimate SciList users have security permissions to see and use the folder.

Configuring Access Control

Background

Access Control allows the main user to limit access to the application based on who is using the program. This is necessary if you wish to expose some of the users to more functionality than others.

We have provided two users with SciList.
- Super - the fully privileged user
- User - has limited access: browse stock and print

Most users of SciList will probably be satisfied with these two, so the following sections on user management may be safely ignored.

Passwords

Change your password from the File menu. Each user can only change their own password.   So Super cannot modify User's password directly. ***You must be logged on as User to change User's password.***

Changing the User Password

You have many potential individuals who may log on as User, and if any could change the password, it can be lost. Consequently we have restricted User's access to the File menu. This means that User can't normally change their own password.
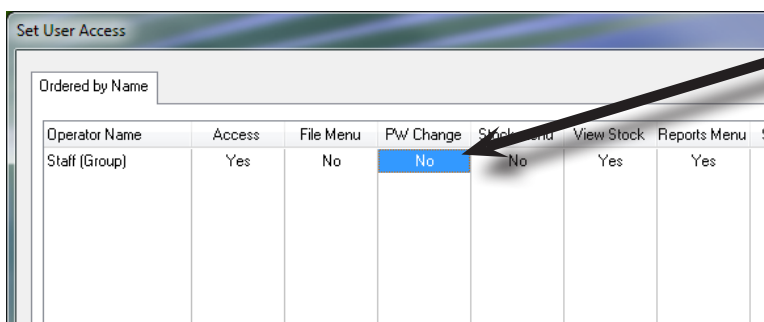
To change the User's password you must:

1: Log on as Super and give User access to *Change Password* on the File menu
2: Log on as User and change the password
3: Logon again as Super and block *Change Password*

These steps are illustrated below

1: Log on as Super

Login as Super and immediately press <CTRL-F8> to bring up the Access Control window.

Double click the PW *Change* setting to make it "Yes".

(User is a member of the staff group shown... initially the only member)

Log out

2: Log on as User

Login as User, go to the File menu and change the password.
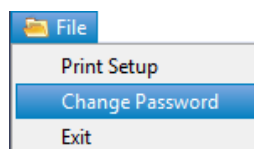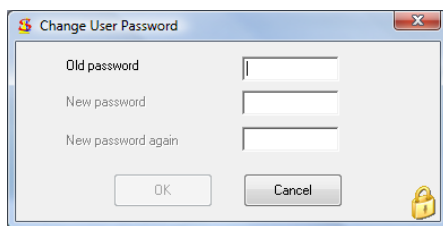
You will need to enter the existing password before you can set a new one.

Log out after changing the password.

3: Log on as Super

Repeat step 1, and change User Access to Change Password to "No"
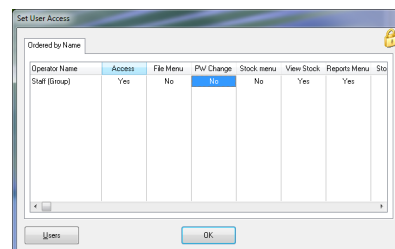
Saving security settings

Security settings include the users, passwords, and access privileges for these users. They are stored in the encrypted file dssw5.tps in the SciList folder. *It is recommended that you save a copy of this file in a secure location*. It is possible (hopefully unlikely) for a user to delete this file. If it is missing, SciList has no security. Any user will have full access. On a network it might be advisable to get the network administrator to place a Deny Delete permission on it.

Lost a Password?

Restore the file dssw5.tps from your backup. All security settings will be restored.

If you have no backup of this file, delete the user and add it again.   You will have to reset the password. (see above)

Login Control

Login Control enables you to create new users and fine tune a user's access rights.

If you need a user to have more rights than User but less than Super, you might want to add a new user and set their access rights.

A user can be classified into one of 3 possible levels.

- Supervisor: This level has full access.
- No Access:
- Operator: This level is in between, i.e. a user has limited power.

A Supervisor is allowed to change the security access rights of other Users. An Operator cannot change either their own, or anyone else's, Access rights.

Inserting a new user
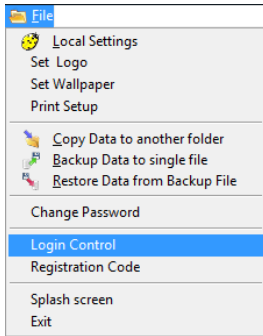
Go to
File > Login Control
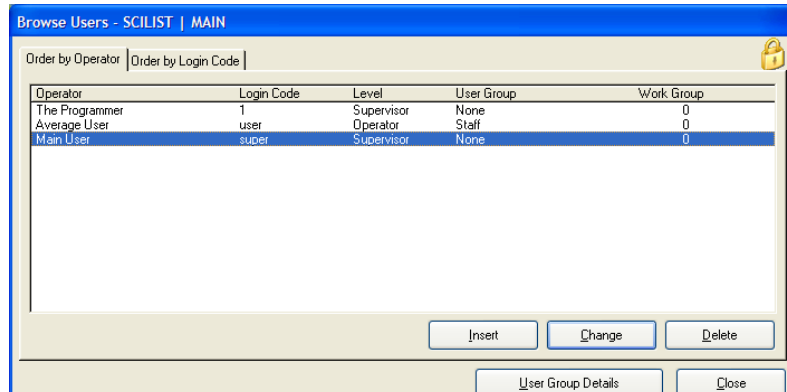
Click *Insert*

Check *Operator* Level

Set Default access to *All Access*

Leave User Group as *None*

Click *OK*

The user name is the initial password and should be changed using the procedure described on the previous pages.

The new user has full access and now has to be restricted based on your needs. See next section.

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Access rights

The Set Access screen allows a supervisor to limit access to specific controls (menus and buttons) and windows within the application.

By going to any window and pressing <Ctrl-F8>, you will get the Set Access window. Not all windows have access rights. Usually this is becasue only users of Supervisor level are allowed access to them.

This Access Control window will have a list of the Operators on the left. Supervisors are not listed because they always have full access.
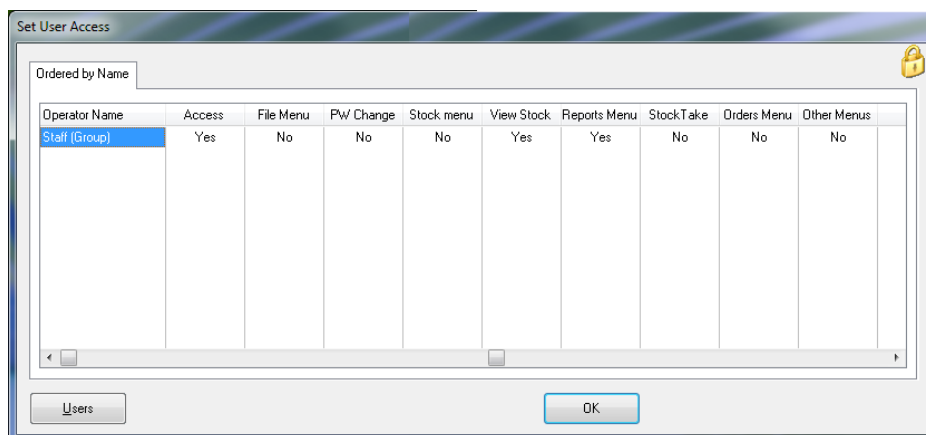
The Access Control Window when <CTRL-F8> is pressed from the main window.

The list takes the form of a spreadsheet, with the names on the left, and the access rights on the right. By double-clicking on the displayed rights, access can be changed from Yes to No.

You need to do the same on any windows to which the user then has access. Generally, if you disable Edit Buttons or Update Buttons the user will not be able to change data.
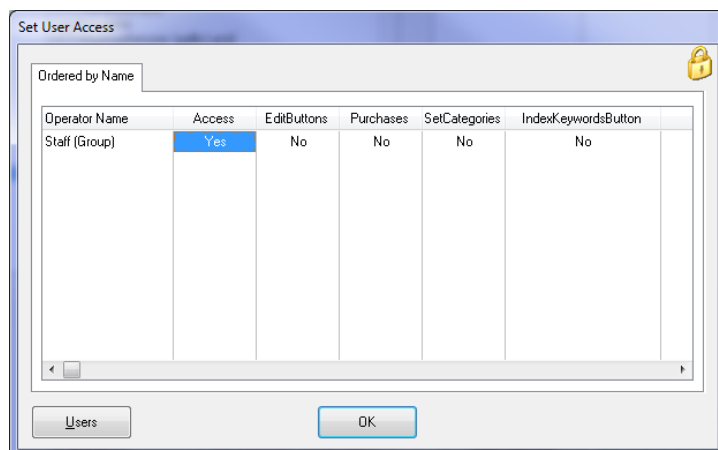
For example:

This is the Access Control window from Browse Master Items.

Access - Yes means that staff can open the window. If you set it to no, the window will not open for them.

With other options set to NO, a staff user can browse all the data, but not change anything.

SciList's Files

Name
category.tps
ChemHist.tps
discipline.tps
dssw2.tps
hazard.tps
Invoice.tps
ItemCat.tps
ItemDisc.tps
ItemReorder.tps
kwexclude.tps
kwindex.tps
location.tps
masteritem.tps
ODetail.tps
OrderItem.tps
orders.tps
OwnScilist.tps
prepgear.TPS
Purchase.tps
Reorder.tps
ReorderHistory.tps
room.tps
SavedEmail.tps
status.tps
stock.tps
StockHis.tps
stocktake.tps
sublocation.tps
supplier.tps
Upg.Tps

This listing shows all data files associated with SciList.
(Except dssw5.tps not dssw2.tps since May 2012)

SciList.exe and the various .dll files comprise the program.

SciList is written with a database development language system called Clarion. Clarion uses a proprietary data file format identifiable by the .TPS extension. Each physical data file holds one logical data table together with its indexes.

TPS files cannot be edited directly with common tools.

Restoring from a backup

To restore data from a backup, use Windows explorer to copy the .tps files from your backup folder into your working folder. See Data Backup section for further information.

Program Updates

The program will change with features requested by users, extra reports, bug fixes and so on. No commercial software is static.

Updates to SciList are posted at
http://www.carobcom.com/download.htm

Updates are free to download unless a major rewrite is released, whereupon a charge would be made.

File structure changes

Often when a data base program is updated, there are changes to the design and structure of data tables. SciList will automatically convert data files upon the first running of the new version if it needs to.
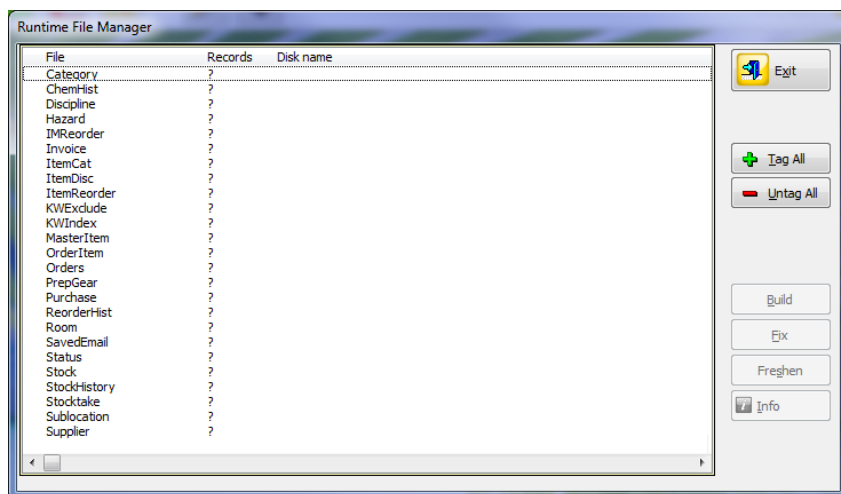
Runtime File Management Utility

New in the May 2012 SciList, this utility allows you to manage your files to some extent, especially if you think there may be a corruption.
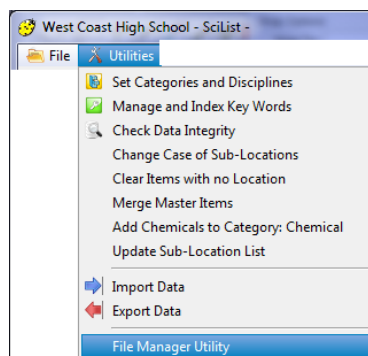
From the Utilities Menu, choose the File Manager Utility

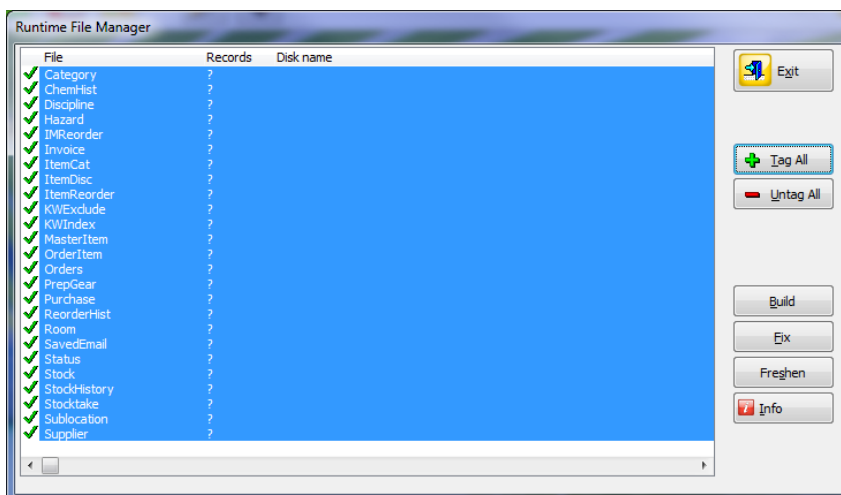It displays most of the operational files. You must tag all or some of the files to work with them.

If you Tag All (or some), you may then carry out several operations.
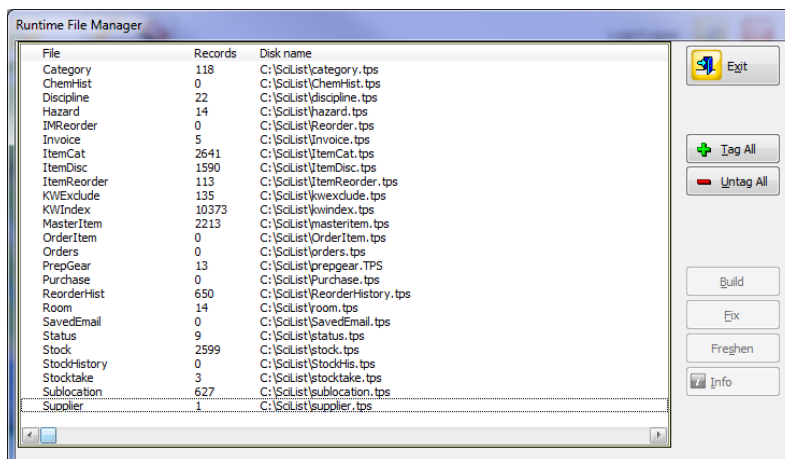
Build rebuilds all indexes (keys) in selected files.

Fix attempts to repair a corrupted file.

Freshen copies all files to new copies of themselves.

Info tells you about the file.

Info

lists the number of records
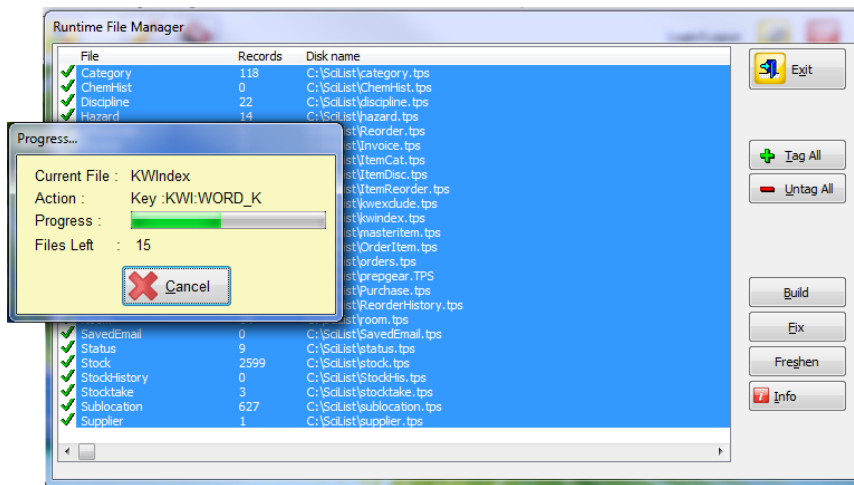
Build

This takes some time and a window appears, showing progress as keys are rebuilt in the selected files.
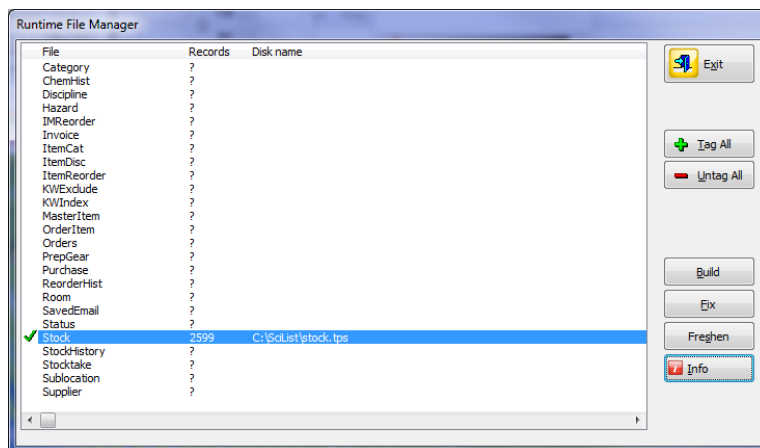
Fix

It is best to use this only on indiviual suspect files.

If this does not work (and it may not), use TPSFix yourself. See next section on File Recovery

Freshen

This creates a new file and copies all the old records out the old file and puts them in the new file.
This effectively removes all duplicate entries (which might be causing the Build to fail) and also can act as an effective fixing of possibly corrupted files

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Recovering Files

TopSpeed files are very robust and problems are rare. However, power glitches for example can partly corrupt files. A corrupt file is usually indicated when the file is opened, either when you start SciList or try run some part of SciList. There is usually a message saying that ClaTPS.dll is having a problem with a file. The file is usually named. You can Abort or Ignore, but generally the program will fail.

TPSFix

TopSpeed provides a utility called TPSFIX.EXE which is part of the SciList installation. It is located in the directory C:\SciList\FirstAid.

TPSFIX attempts to read a corrupted TPS file and write it to a new file of the same name with an extension of .TPR.

This process does not always work if the header area of the file is damaged, so a further measure is provided. All of the major SciList data files have an Example file in the FIRSTAID directory with an extension .TPE. Given a .TPE file to work with, TPSFIX can tell what the file format ought to be, and do its best to produce the .TPR repair file.

After TPSFIX has run, producing a TPR file, the corrupt TPS file should be copied elsewhere, and the TPR file renamed as TPS. Then run SciList.
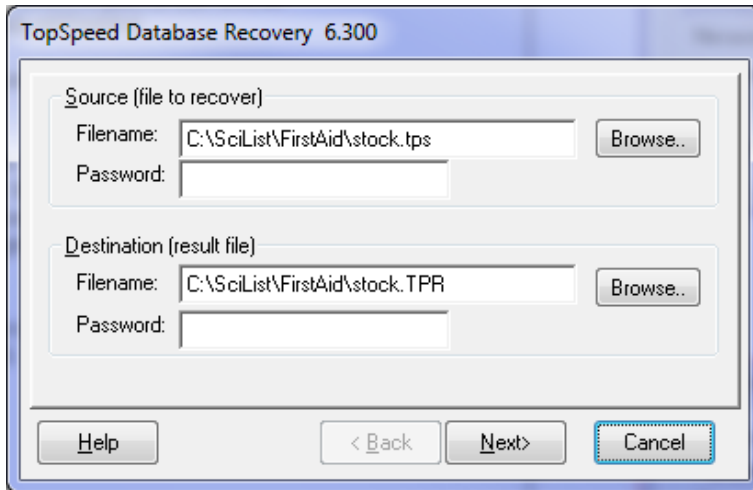
This is described in the following example.

TPSFIX Example

Assume that Stock.tps file in C:\SciList is corrupted.

• Run TPSFIX.EXE.

This window appears, asking for the the file to recover.

(In this example, I have copied Stock.tps from the main folder into the FirstAid folder, so I am working on a backup)
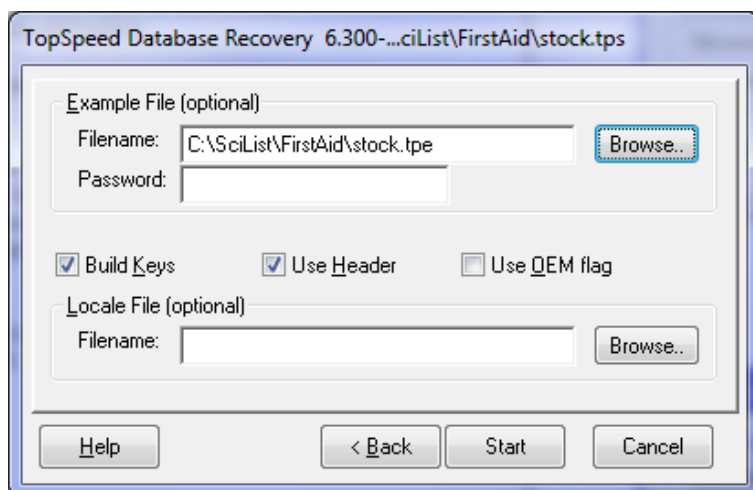
Browse and locate your Stock.tps

The recovery file is suggested as Stock.tpr.

Accept this.

• Press Next

This screen appears asking for the location of the example file. Note that this is optional, but recommended.

Find the .tpe file in the FirstAid folder

Make sure Build Keys is ticked

The Locale file is not used.

• Select Start

If the file is not corrupted, TPSFIX will tell you that it thinks the file is OK and allow you to exit.

After repair,

   • Remove the suspect Stock.tps
   • Rename Stock.tpr to Stock.tps. (and if necessary, copy it back to the main SciList folder)

Note that TPSFIX comes with its own Help file which can be referred to.

SciList.ini

SciList.ini is a plain text file that saves window information, including locations and fonts. If you move a window, its location is stored here.

SciList.ini is kept in the program folder.

If a window does not appear when expected, it may be that the location of the window is off screen. In this case, delete SciList.ini. All windows will then be in their default locations.

Data Import

SciList allows you to import general items and chemicals as separate processes.

Many users already have stock lists in electronic form, often in a spreadsheet. If so you will probably be able to manipulate it into a format suitable for import to SciList.

Menu Option File > Import Data
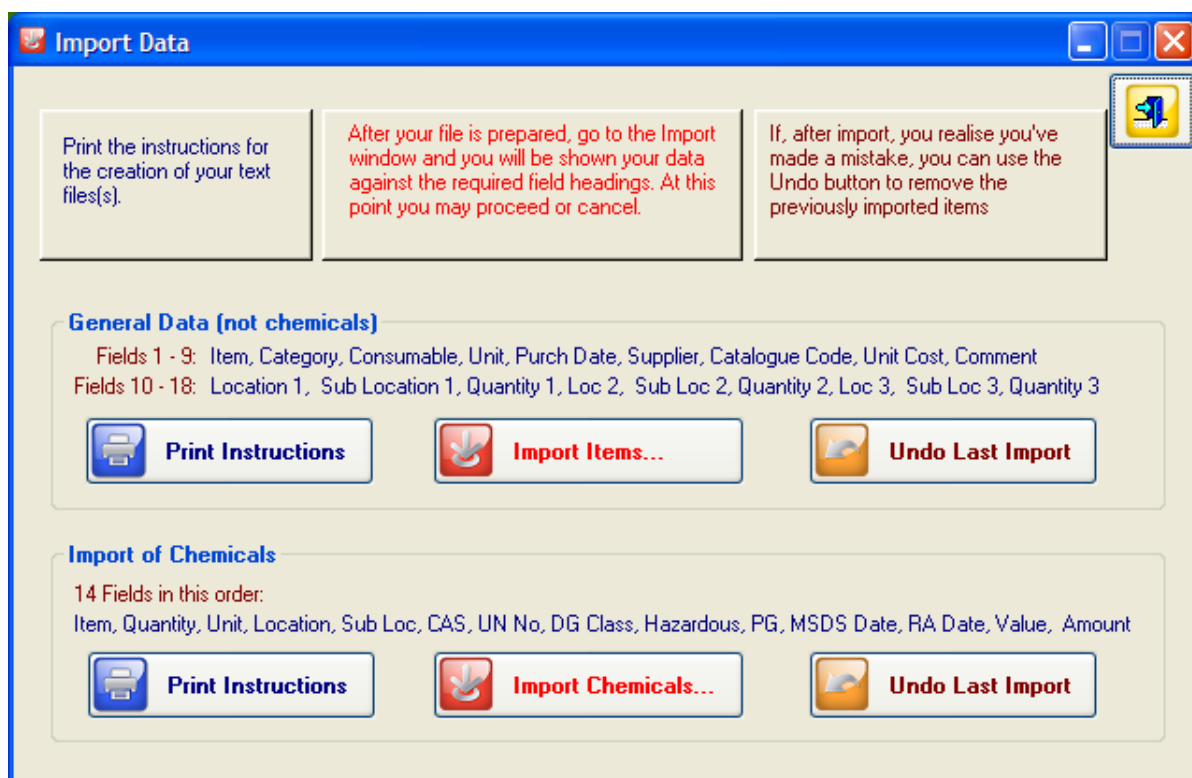
For either import of general equipment or chemicals, first print the instructions. The printed instructions will be up-to-date with your program, where-as this user guide may become out-dated. The printed instructions are convenient to give to the person making up the data.

Both imports retain existing data.

Neither import will write over an existing item if it already exists in SciList. i.e. only fresh items will be added. However, if an item exists, but the import file shows it to have stock in a new location, that stock detail is imported.

For both imports, Item Name is the only compulsory field, but obviously it would be useful to have some quantites and locations. Fields that you don't understand or don't need can be left blank in the import file.

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Import Equipment - File Format

The import file must be tab-delimited text, as created by Excel when saving as Text(msdos). The name does not matter, but must have .txt extension.

Take time to check for consistent naming conventions. The main descriptor is better as the first word, so that common items are grouped together alpabetically in listings.

e.g.   Beaker 100 ml
         Beaker 200 ml

Be consistent with capitalisation.

Spellcheck your data before import.

This table shows the file format for general equipment.

Column Position	Column Contents	Max Size	Example	Comment
1 or A	Item Name	60 char's	Beaker - 100 ml	The only required field
2 or B	Category	30	Junior Science	SciList category The import will create the category if required.
3 or C	Consumable	3	No	If Yes, SciList creates a category named Consumable, and adds this item to that Category
4 or D	Unit	10	item	Unit of the quanity eg ml, g, carton
5 or E	Purchase Date	10	31/08/2006	DD/MM/YYYY
6 or F	Supplier Name	40	State Supply	
7 or G	Catalogue ID	20		Supplier's Catalogue Code
8 or H	Cost		3.46	Cost of a single item, no $ sign
9 or I	Comment		Pyrex	
10 or J	Location 1	20	Room S5	The Location will be added to
11 or K	Sub Location 1	20	Cupboard 3	SciList's locations
12 or L	Quantity 1		20	
13 or M	Location 2	20	Room S3	
14 or N	Sub Location 2	20	Front Desk	
15 or O	Quantity 2		10	
16 or P	Location 3	20		In this example, the beakers
17 or Q	Sub Location 3	20		are only in 2 locations
18 or R	Quantity 3			

If equipment is located in more than 3 locations, duplicate the line using the same item name in column 1 and extra locations and quantities in fields 10 to 18. With duplicated items, fields 2 to 9 are only imported from the first of the lines.

Import Chemicals - File Format

The import file must be tab-delimited text, as created by Excel when saving as Text(msdos). The name does not matter, but must have .txt extension.

The import file format allows for a range of safety information. No single user would be expected to use all fields.   They are there just in case you have this information already recorded and can import it.

The expected data would be Columns 1 to 4, and perhaps 13.

Columns that have no data must be retained in the text file as blanks. e.g. Unit Cost must be in Column 13 even if you have no columns 5 to 12.

Column Position	Column Contents	Max Size	Example	Comment
1 or A	Chemical Name	50 char's	Acetaldehyde	The only required field
2 or B	Quantity		3500	Will be written as both Stocktake Quantity and Tigger Level Adjust in SciList for your own usage
3 or C	Unit	10	ml	For chemicals, better to use small units (ml, g) so that quantities may be entered without decimal
4 or D	Location	20	Chem Store	
5 or E	Sub Location	20	Shelf 7	
6 or F	CAS Number	12	75-07-0	Format: Up to 7 digits - 2 Digits - 1 Digit
7 or G	UN Number	4	1090	4 digits. Don't put UN in front.
8 or H	DG Class	3	3.1	Use 0 for stable chemicals
9 or I	Hazardous	3	Yes	Yes or No or Blank
10 or J	Packing Group	3	II	I II III or blank
11 or K	MSDS Date	4	2006	If MSDS is held, 4 Digit Year
12 or L	Risk Assessment Date	4	2007	If RA is written, 4 Digit Year
13 or M	Unit Cost		12.50	No $ sign
14 or N	Manifest Quantity	20	5 Litre	Qty + Unit. To print on DG Register

If chemicals are located in more than 1 location, duplicate the line using the same item name in column 1 and extra quantity and location in fields 2 and 4. For duplicated items other fields are ignored.

All imported chemicals are automatically added to the category named Chemical.

The Import Process

For either import, you are prompted for an import file.
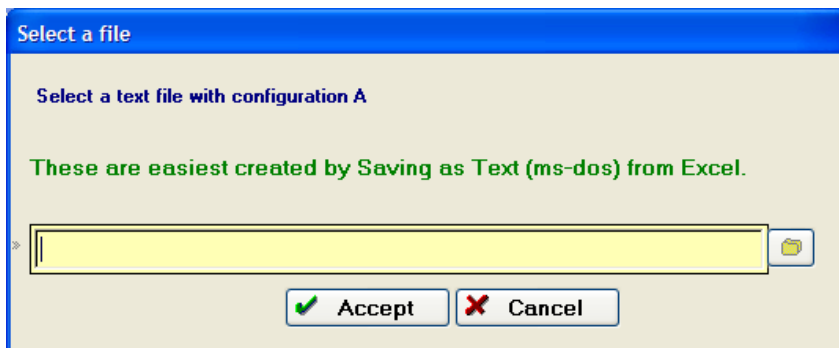
Use the folder button to bring up the File Dialog below.
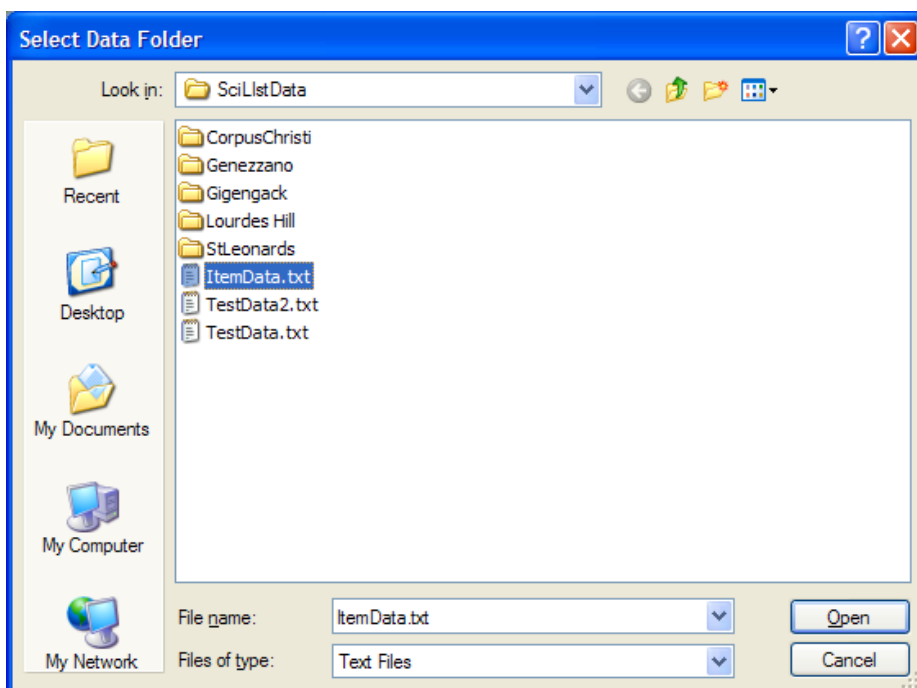
Select your import file.
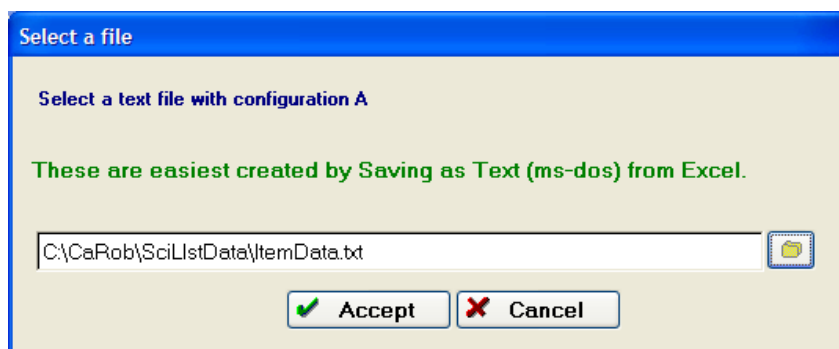
Accept

The following window is displayed for the Item Import

Import Science Apparatus from Text File

Your data is displayed. Ensure each field matches its heading. If not correct the data before import.

| Position | Contents | Line | 1 | of | 9 | View next... |

Position	Contents	Line / Value
Col 1 (A)	Item Name	Lego technics kit
Col 2 (B)	Category	Robot
Col 3 (C)	Consumable Yes or No	No
Col 4 (D)	Unit eg ml	kit
Col 5 (E)	Purchase Date DD/MM/YYYY	28/10/2007
Col 6 (F)	Supplier Name	Sci Supplies
Col 7 (G)	Supplier Catalogue No.	SS1234
Col 8 (H)	Unit Cost eg 24.40 No $ sign	65.75
Col 9 (I)	Comment	classroom use
Col 10 (J)	Location 1	Room S5
Col 11 (K)	Sub Location 1	Shelf 10
Col 12 (L)	Quantity in Location 1	15
Col 13 (M)	Location 2	
Col 14 (N)	Sub Location 2	
Col 15 (O)	Quantity in Location 2	
Col 16 (P)	Location 3	
Col 17 (Q)	Sub Location 3	
Col 18 (R)	Quantity in Location 3	

Import

The following window is displayed for the Chemical Import

Import Chemical List from Text File

Your data is displayed in red. Ensure each field matches its heading. If not, correct it before import.

| Position | Contents | Line | 1 | of | 21 | View next... |

Position	Contents	Line / Value
Col 1 (A)	Name	Acetaldehyde
Col 2 (B)	Quantity	450
Col 3 (C)	Unit	ml
Col 4 (D)	Location	Chem Store
Col 5 (E)	Sub-Loc	Steel Cupboa
Col 6 (F)	CAS No ########-##-#	75-07-0
Col 7 (G)	UN No ####	1090
Col 8 (H)	DG Class eg 4.1	3.1
Col 9 (I)	Hazardous (Yes/No)	Yes
Col 10 (J)	PG (I II III)	
Col 11 (K)	MSDS (Year)	2000
Col 12 (L)	Risk Assessment (Year)	2001
Col 13 (M)	Value ###.##	3.45
Col 14 (O)	Manifest Quantity	

Import

In either case you may scroll forward and view the text file records.   When you are satisfied, click Import.

Undoing an import

After importing, browse your data to see if it looks correct. For chemicals, you may use the utility Browse Chemicals (Browse menu).

If not satisfied with the data, return to the Import Data window and select the appropriate Undo button.   This will remove all items (or chemicals) and associated stock records. The Undo action does not remove Categories or Locations that were created at import so you would have to tidy those up yourself if necessary.

Export Data

File > Export Data

Export Items will export all items except chemicals.
Export Chemicals exports Chemicals only.

Both exports will overwrite any previous data in the respective text files.

Both create tab-delimitted text files of the same format as required for import into
SciList.   These files open easily in Excel.

Exporting Items places 3 locations and quantities on one line of data. If more than
3 locations exist, the item is duplicated with the extra locations, 3 on each line.

Categories present a slight problem because the text file Equipment.txt has only
one field for Category but the item may be in several categories. The export first
checks if one of the categories is 'Consumable'. If so, the field Consumable is
set to 'Yes'.   The Category field in the text file is then set to the first category of
that item that is not Consumable.

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