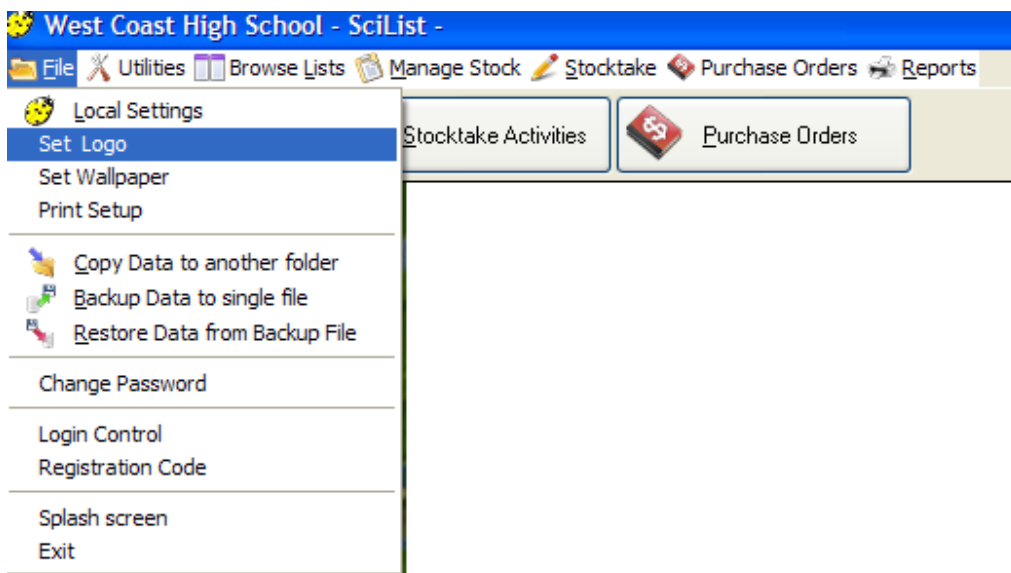# SciList Update

Brief summary of changes made in September 7th 2009 version of SciList
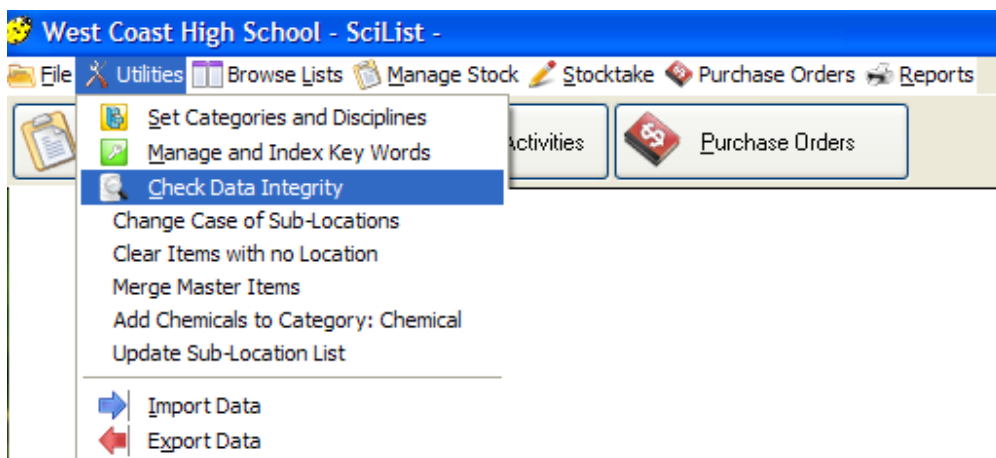
File Menu

Added the ability to *Copy Data to another folder* with the option to *Include Program Files*. Added the ability to *Back up Data to a single file* that is Date & Time stamped (i.e. create an Archive file) and *Restore Data from Backup File*.

File > Local Settings form has a number of new fields which are described further below.
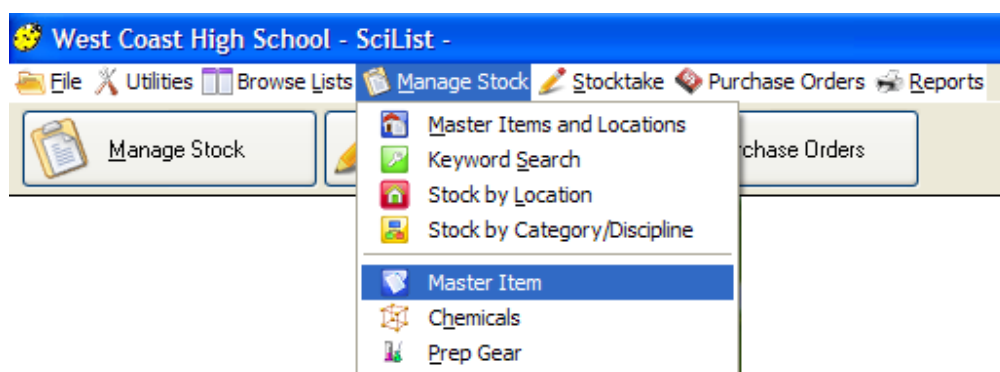
Utilities

The menu *Utilities > Check Data Integrity* now tidies up problems caused in data in previous versions. It deletes duplicate purchase histories and orphaned purchase order items (these occurred in past data when orders were deleted) as well as taking Chemicals out of the Stock

Value count. These faults are now corrected in this version. It also updates past orders to the new format showing quantities on received orders (see under Purchase Orders module).
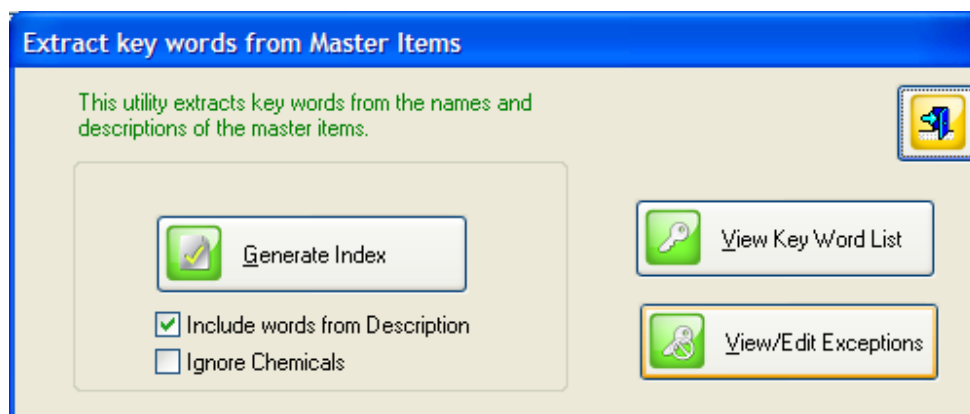

The menu *Utilities > Manage and Index Keywords* now manages everything to do with the **Keyword Index**. The bug which occurred when *Ignore Chemicals* ticked is now corrected. The index now ignores all numerals e.g. ignores 100ml as a keyword.

Manage Stock module

New menu on top line called *Manage Stock* and a new browse window *Master Item* which gives an alternative quick overview of all **master items**, their total quantities, reorder quantities (if a stocktake has not been finalized) and value (if not Chemical).
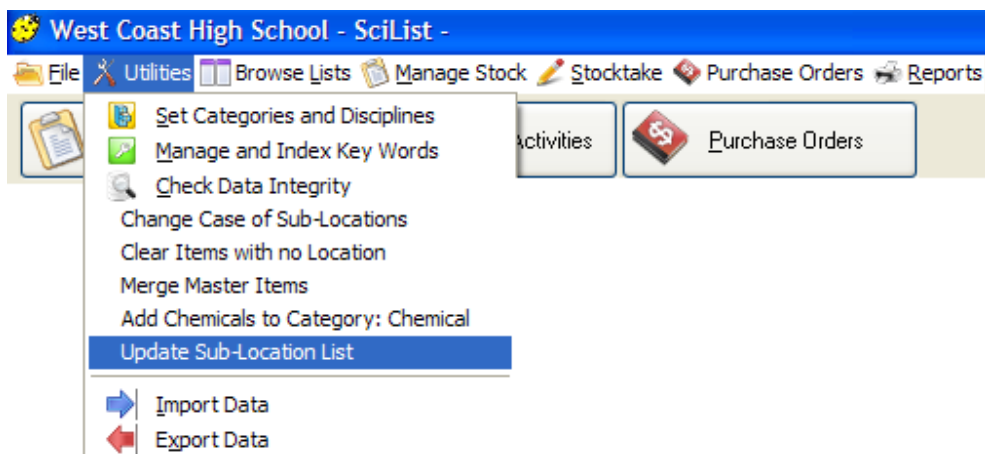
Sub-locations have a new dropdown list. A utility has been provided to copy all existing sub-locations into this new file. (*Utilities > Update Sub-location List*). To standardize your sub-locations, check for duplicates, inconsistencies etc. at *Browse Lists > Locations* after running the utility.

If a **Master Item** is tagged *Is Chemical*, the field called *Item Value* no longer appears. Chemicals are impossible to value as stock levels vary, purchases are often rare, stock is counted in mls and gs but purchased in bottles or packets etc . of larger quantities e.g. 500ml bottle.

Purchase Orders module

Live web links to Suppliers websites are now available from *Browse Lists > Suppliers* and *Edit Orders* menus. Web addresses must be entered in the Suppliers file.

Ability to send an order by **email** – after saving the order as a .pdf file (> *Print order* then go to *File > Save as* – choose Pdf from box). Need to set up email first (*File > Local settings*. Insert email address in the form then tick *Activate email*. Go to Tab on top > *Email Setup* and fill in details). Must have email addresses for Suppliers in the Suppliers file.

Your **customer number** assigned by each supplier can now be added to the Supplier's information in *Browse Lists > Suppliers*. It will then appear on any orders to that Supplier.

New option to automatically assign **Order Numbers** with your own prefix. See *File > Local Settings > Auto-generate Order No.* (see 2nd screen shot above).

Receiving orders – enter **quantity received**. (see *Update Order details* screen shot on page 3). It's easiest to use *Mark All Items As Received* button, then change the received quantity for the few items that didn't all come.

Can now query for backorders, i.e. where quantity received is less than the order quantity. The report (*Reports > Incomplete Orders*) gives a list of incomplete orders prior to a chosen order date, showing order details, the item and the shortfall.

Copy to purchase history – now copies only new purchases and updated prices, doesn't make duplicates if this button is clicked more than once. E.g. often an item you ordered (from a catalogue or from your purchase history) has had a price rise. If you forget to alter the price on the order before copying to purchase history, you can edit later, then copy to purchase history again – only the unit price will be updated, there will not be a duplicate copy of the purchase history.
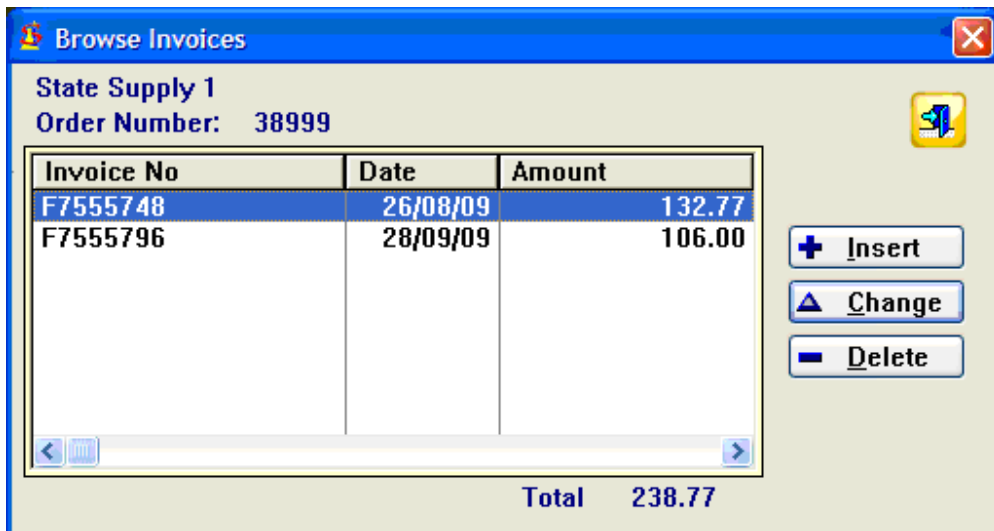
Invoice numbers, date(s) of invoice(s) and total cost on invoice can now be recorded for an order.
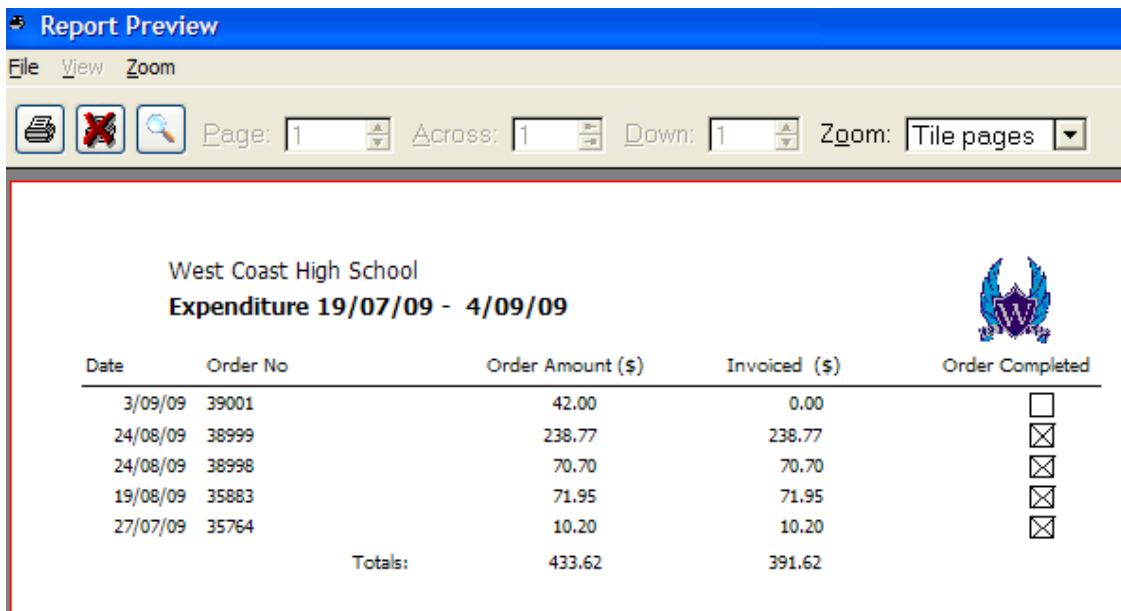
Expenditure – under *Reports > Expenditure*. This report lists all orders and invoice values, and totals expenditure between selected dates.

Stocktake module

Enter Stocktake Counts: new filter on this table – shows only items in the location or category already chosen. Remember to tick the *Use Update Form* box if you need to alter any details for an item other than the stocktake quantity. Double click an item or use the *Update* button to call up the *Stock Items* update form.

Chemical Stocktake – all *Master Items* that have the box *"Is Chemical"* ticked will have the amount weighed, measured or counted at the previous stocktake listed in the yellow column. Chemical stock levels are recorded differently from other stock items. The stocktake unit is in ml or g. This is to allow a 'trigger level' to be used to stimulate ordering. This 'Trigger level' is used instead of the 'Ideal quantity' of non-chemicals.

Chemicals therefore display differently on the screen above. The 10g in the Qty column is the "Trigger level" for reordering. The Total Qty amount is the actual weighed amount at the last stocktake.

A chemical may be used very slowly over many years, so a trigger level might be quite low. E.g. there is stock of 2 litres of conc. Ammonia, but based on how little is used each year it would not need to be reordered until the stock level falls to about 300 ml. So the trigger level is set at 300 ml.

When an auto order for a chemical is generated from a stocktake, the unit of the quantity is that by which it is weighed, measured or counted, but the unit by which it is purchased is usually different. E.g. a shortfall of 52 ml, 454 ml, etc., requires the order of one 500 ml bottle. You will need to manually alter the unit on the purchase order from the Stocktake Unit to the Purchase Unit and enter the correct cost.

No cost for a chemical is transferred to the Master Item value; this field no longer appears when the Master Item 'Is chemical' box is ticked. If it did, the purchase price multiplied by the amount held (in g or ml) would give a wildly false value. E.g. $15 for a 500 ml bottle, multiplied by the trigger level of quantity 300 ml, gives a value of $4500!

During a **chemical stocktake**, enter all quantities for chemicals or enter those which have changed from last stocktake. (See Keryn's sticker method below). SciList will save last year's stocktake quantity if it is above the trigger level. All chemicals with stocktake quantities below the trigger level will be reset. You can check the S*tocktake History* button for each chemical when entering stocktake counts to assist with usage patterns.

As with all non-chemical stocktakes, orders will be generated for chemicals with stocktake counts that are below the trigger level. If you want to force an order to be written, change the trigger level. E.g. 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.

Keryn's sticker method (learned from someone else) – put a sticker with the current year on every chemical during stocktake. Remove when used any time in the following year. Next year you won't have to weigh, measure or guess the volume of anything with a sticker still on it, as it hasn't been used and the previous year's amount is still displayed in the *Enter Stocktake Counts* table. Put another sticker on everything again next stocktake, and eventually you will be able to tell how long it's been since that chemical was used.

Re-order list can now be printed by item, or by location to allow easy **restocking** when orders arrive. See *List by Location* button above.

Reports

Reports > Stock Value. If a **Master Item** is tagged *Is Chemical*, the field called *Item Value* no longer appears. Chemicals are therefore not counted in the reports on stock value.