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Option 1: Inventory Audit with bulk update template

Step	Screenshot																																
1. Download a copy of Jaggaer Inventory Reconciliation – Text Upload Template here 2. Conduct inventory audit and fill in the form You can choose to audit at Room level or Sublocation level (e.g. fridge, cabinet, shelf) • If auditing a Room, ensure to include all containers within the room. • If auditing a Sublocation, specify the full location path and include only containers within that sublocation. 3. Send the file to Jaggaer system admin team at jaggaercim@unsw.edu.au with: • Subject: 'Inventory Reconciliation - <your area>' • Your selected Reconciliation Level – Room/Sublocation • Do you wish to change the owner of these containers to the user performing the inventory audit? This function might be helpful when you need to change ownership of a bulk of containers when someone left UNSW.	How to fill in the template: <table><tr><th>Column</th><th>Required</th><th>Information</th><th>Example</th></tr><tr><td>User ID</td><td>Yes</td><td>UNSW zID (with z) of the user performing the inventory audit</td><td>z1234567</td></tr><tr><td>Container Bar Code</td><td>Yes</td><td>Jaggaer barcode</td><td>71371</td></tr><tr><td>Container Site</td><td>Yes</td><td>School names</td><td>SBMS, Chemistry, BABS, BEES</td></tr><tr><td>Container Building</td><td>Yes</td><td>Building number</td><td>D26, E26, F10</td></tr><tr><td>Container Floor</td><td>Yes</td><td>Floor number</td><td>2, 3, LG, G</td></tr><tr><td>Container Room</td><td>Yes</td><td>Lab/storage room number</td><td>231, 1003</td></tr><tr><td>Sub-location</td><td>No</td><td>Room sublocation</td><td>Flam Liq Cab 1 Cpd F >Shelf 1</td></tr></table> Note: Container location must match with the actual location that you are performing the audit.	Column	Required	Information	Example	User ID	Yes	UNSW zID (with z) of the user performing the inventory audit	z1234567	Container Bar Code	Yes	Jaggaer barcode	71371	Container Site	Yes	School names	SBMS, Chemistry, BABS, BEES	Container Building	Yes	Building number	D26, E26, F10	Container Floor	Yes	Floor number	2, 3, LG, G	Container Room	Yes	Lab/storage room number	231, 1003	Sub-location	No	Room sublocation	Flam Liq Cab 1 Cpd F >Shelf 1
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Container Room	Yes	Lab/storage room number	231, 1003																														
Sub-location	No	Room sublocation	Flam Liq Cab 1 Cpd F >Shelf 1																														

4. Inventory update

Jaggaer admin will send you a **Summary of Inventory Reconciliation** which includes:

- Audit location
- Number of containers audited vs number of containers recorded in Jaggaer

Jaggaer will automatically update containers' details, which include:

- Container status
- Last inventoried date (today's date)
- Location and/or owner

Container status will be updated as below:

- **Matched:** Refers to containers that were found on-site and in-system. Keep container status as Available.
- **Mismatched:** Refers to containers found on-site and in-system, but with different locations. Keep container status as Available and transfer to the new audited location.
- **Not scanned:** Refers to containers not found on-site but exists in-system. Change container status to Disposed.
- **Disposed:** Refers to containers that were on-site but marked as Disposed in-system. Change container status to Available.

Summary of Inventory Reconciliation

1 sub-location(s) have been selected to be reconciled.
A **full reconciliation** of those locations will be performed. Containers not scanned will be set to In Transit.
The owner of the containers **will not change**.
Based on the information above, the following details will be performed by the reconciliation process:

Reconciliation Status	Description	Counts
Matched	Container scanned location same as system location	4
Mismatched	Container scanned location different from system location	0
Not scanned	Containers in location not scanned during reconciliation	51
Not in system	Scanned containers not in the system	0
Disposed	Scanned containers with status of Disposed or Disposed Empty	0
Moved after upload	Containers moved after the inventory reconciliation file was uploaded	0
Disposed after upload	Containers disposed after the inventory reconciliation file was uploaded	0

Total containers to process - 55

Option 2: Inventory Audit with handheld mobile scanner

There are two (2) handheld mobile scanners available to borrow from Health & Safety. To borrow for inventory audit, please fill in this form.

If you would like to purchase a new handheld scanner for your school, please contact jaggaercim@unsw.edu.au for assistance.

Quick Tips before we start

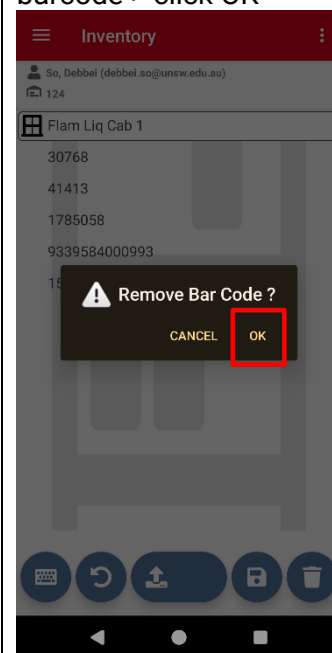
To scan QR code / barcode:

Press either right or left yellow button. Do not press both buttons at once as it may double scan.

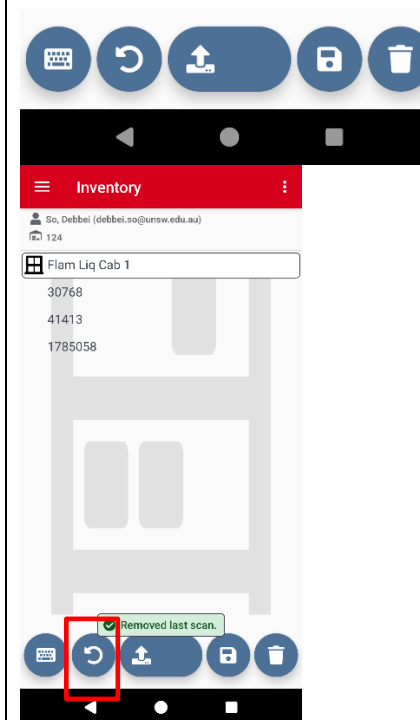


Look out for any abnormal barcodes that may not be a Jaggaer barcode (e.g. longer string with text characters)

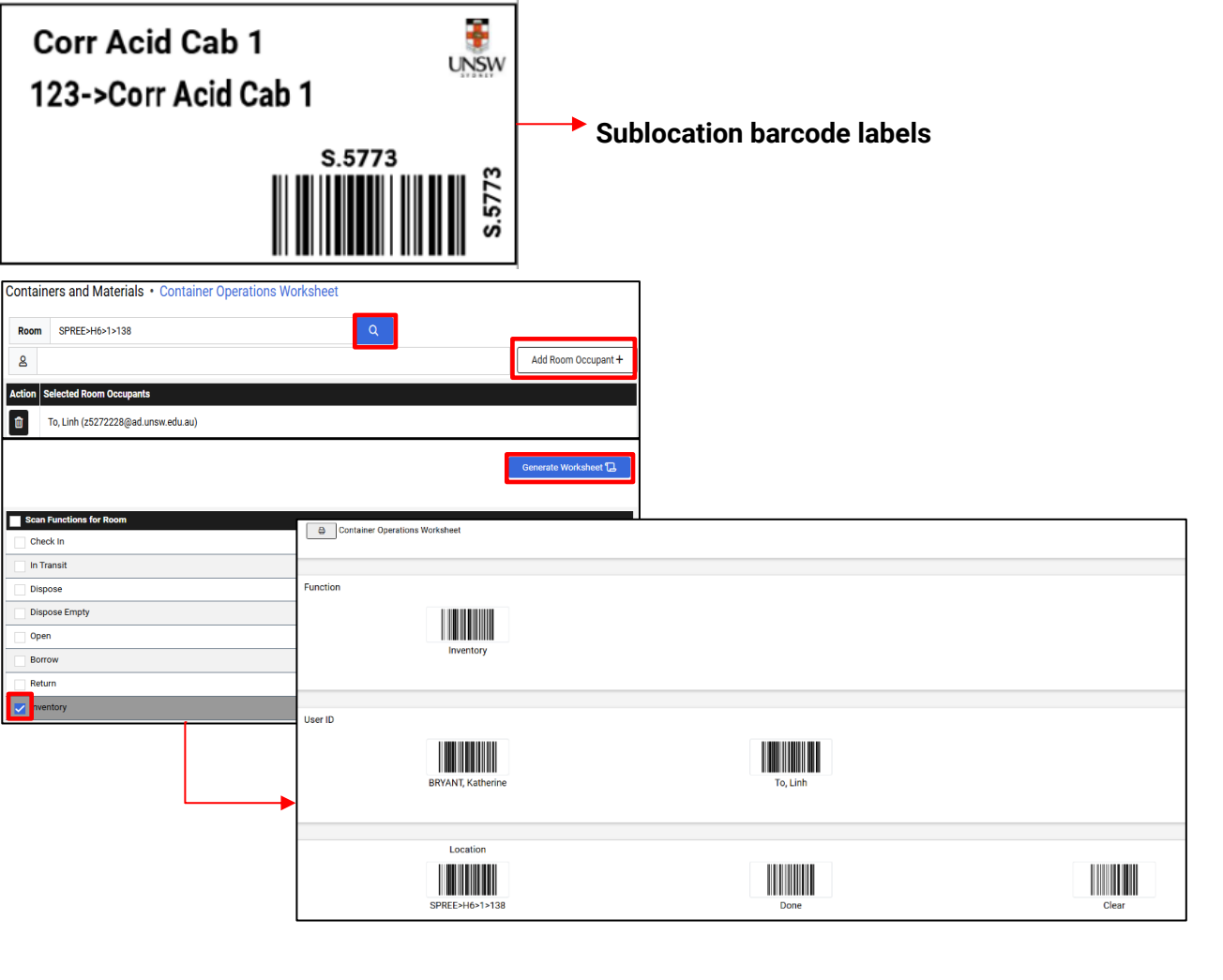
To delete barcode: hold down the barcode you wish to delete > an option will appear to delete barcode > click OK



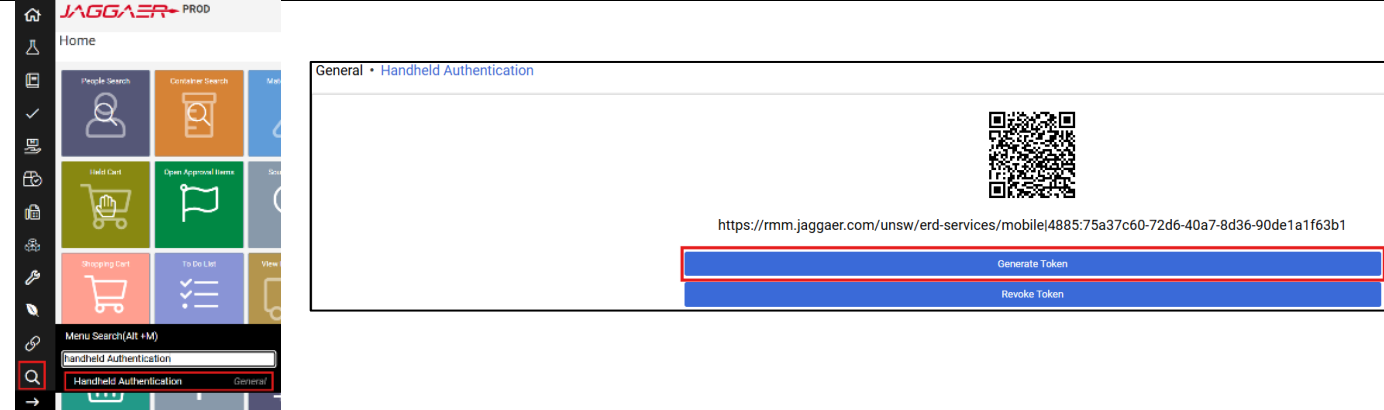
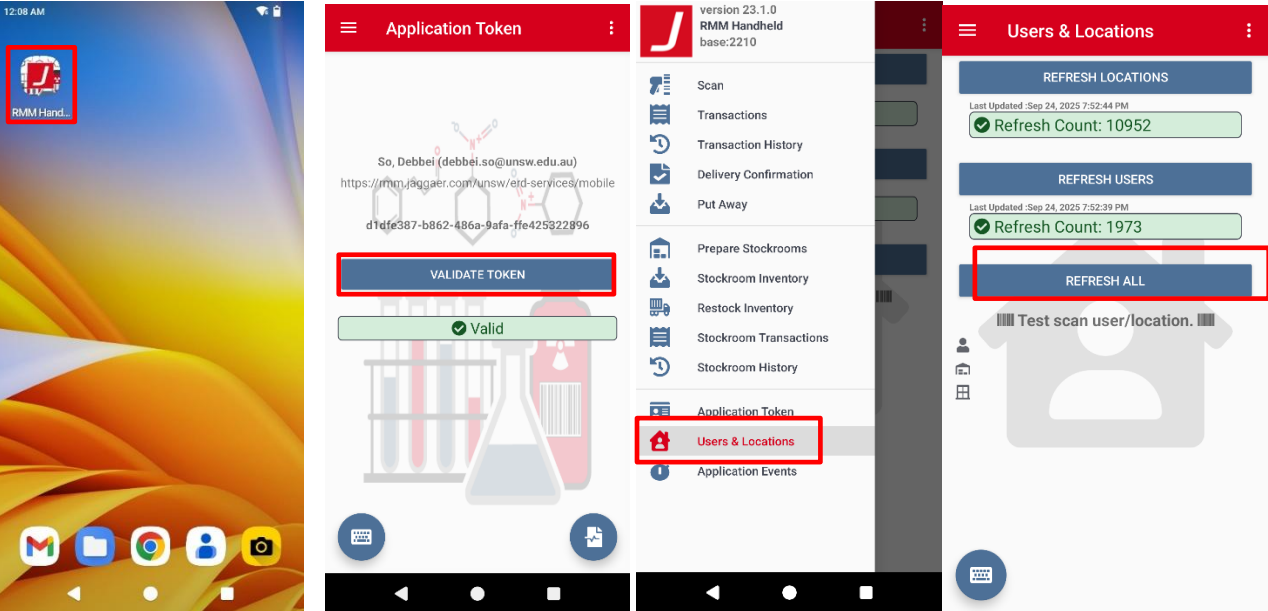
To remove last scanned: click the Undo button



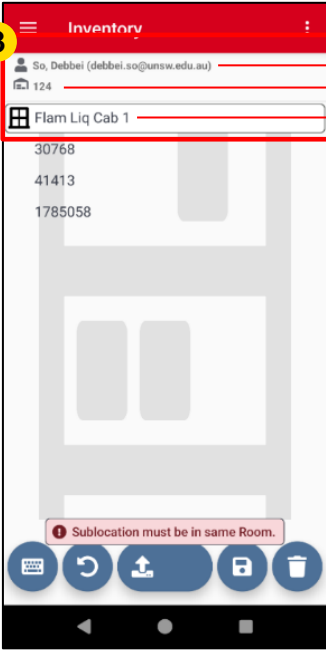
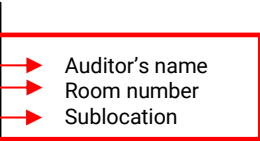
Step 1. Prepare Barcode Worksheet

Steps	Screenshot
Generate Bar Code Worksheet 1 Check if sublocation barcode labels are available in the room that you are auditing. If available, proceed to step 2. If not, contact jaggaercim@unsw.edu.au to request sublocation barcode labels (one-off) 2 Login to Jaggaer. From the left panel, search for Container Operations Worksheet. 3 Select the Room that you are auditing. <i>(Room is default to be your Primary Location)</i> 4 Select Room Occupants – ensure the people performing the audit are included. Room Occupant by default is the list of users whose Primary Location is the selected Room. Add or remove users to generate unique barcodes for those performing the audit. Note: Room Occupants could be assigned as the new owner of containers where needed. 5 In Scan Functions for Room, tick Inventory 6 Click Generate Worksheet to get a list of barcodes to set up the scanner, and print.	 The screenshot illustrates the steps to generate a barcode worksheet. At the top, a sublocation barcode label is shown for 'Corr Acid Cab 1' with the identifier '123->Corr Acid Cab 1' and 'S.5773'. Below this, the 'Container Operations Worksheet' search interface is displayed, showing the room 'SPREE>H6>1>138' and a search button. The 'Add Room Occupant +' button is highlighted. The 'Scan Functions for Room' panel on the left shows the 'Inventory' function selected. The 'Generate Worksheet' button is also highlighted. The resulting worksheet shows barcodes for 'Function' (Inventory), 'User ID' (BRYANT, Katherine and To, Linh), and 'Location' (SPREE>H6>1>138).

Step 2. Authenticate Users

Steps	Screenshot
In Jaggaer 1 Login to Jaggaer. From the left panel, Menu Search for Handheld Authentication 2 Click Generate Token. This will generate a unique QR code for each logged in user. This QR code is scanned in the next step.	 The screenshot shows the Jaggaer web interface. On the left is a navigation menu with 'Handheld Authentication' selected. The main content area displays a QR code for handheld authentication. Below the QR code is a URL: <code>https://rmm.jaggaer.com/unswe/erd-services/mobile/4885:75a37c60-72d6-40a7-8d36-90de1a1f63b1</code>. At the bottom, there are two buttons: 'Generate Token' and 'Revoke Token'.
In the Handheld Mobile Scanner Make sure that your device is connected to stable Wi-Fi 3 Launch RMM Handheld application. 4 Go to Menu → Application Token → Scan the Authentication QR code from Jaggaer → Click Validate Token → Wait for "Valid" message. 5 Go to Menu → Users & Locations → Click Refresh All to load Jaggaer database to the device.	 The screenshot shows the RMM Handheld application interface. The top bar indicates 'version 23.1.0 RMM Handheld base:2210'. The main screen is divided into two sections. The left section, 'Application Token', shows a QR code and a 'VALIDATE TOKEN' button. The right section, 'Users & Locations', shows buttons for 'REFRESH LOCATIONS', 'REFRESH USERS', and 'REFRESH ALL'. The 'REFRESH ALL' button is highlighted with a red box. Below these buttons is a 'Test scan user/location.' button. At the bottom, there is a 'Users & Locations' menu item. Note: Once a user has been authenticated, they do not need to be authenticated again unless the authentication has been revoked after a week of inactivity.

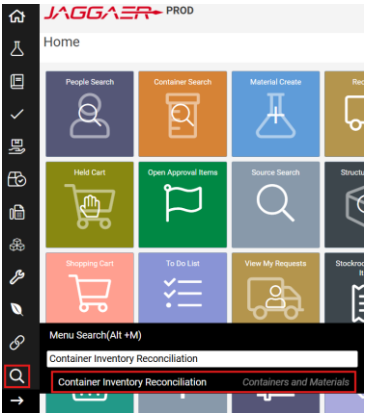
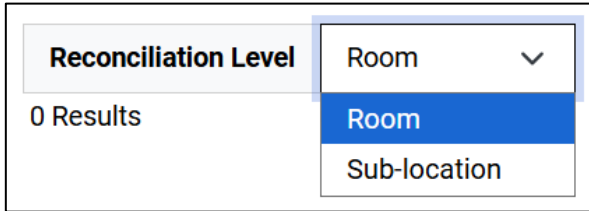
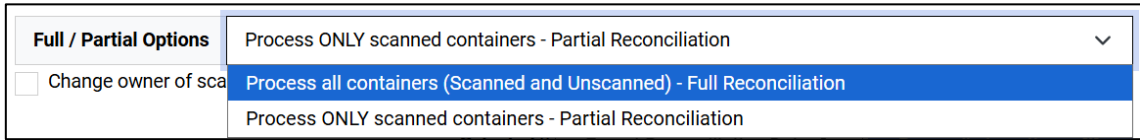
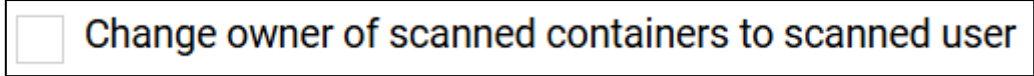
Step 3. Conduct audit using handheld mobile scanner

Steps	Screenshot
Option 1: Audit a sublocation (e.g. cabinet, shelf, fridge) within a Room (recommended) 1 On your scanner, Go to Menu  → Scan 2 Have your Container Operations Worksheet ready. Use the scanner to scan Function barcode → scan User ID → scan Location barcode (Room) → scan Sublocation barcode. 3 Check the Room number and Sublocation name on the scanner screen, make sure it's correct before scanning containers. 4 Start scanning Jaggaer container barcodes in the selected sublocation. 5 If you need to audit another sublocation within the same room, scan the new Sublocation barcode, then continue scanning container barcodes. Note: RMM Handheld will alert you if a scanned sub-location is not part of the current room. 6 Once finished scanning all the containers, click and hold the upload  button until you see the message "Transaction processed" to submit. Note: - You can audit multiple sublocations (e.g. cabinets) within the same room in the same load, but make sure you scan the sublocation barcode before scanning containers. - Do not scan sublocations from different rooms in the same load. - Do not scan multiple rooms in the same load. - If you would like to change the auditor, submit the current transaction before starting another transaction with a new User ID.	 3   Note: Look out for any abnormal barcodes that may not be a Jaggaer barcode. 

Option 2: Audit an entire Room (only if the Room has no Sublocation)

- 1** From the Bar Code Worksheet, use the scanner to scan **Function** barcode → scan your **User ID** → scan **Location** barcode.
- 2** Check the mobile screen to see if the Room number is accurate.
- 3** Start scanning Jaggaer container barcodes in the selected room.
- 4** Once finished scanning all the containers, click and hold the upload  button until you see the message **“Transaction processed”** to submit.

Step 4. Reconcile in Jaggaer

Steps	Screenshoot
1 Login to Jaggaer. From the left panel, Menu Search for Container Inventory Reconciliation page to process the uploaded transaction.	
2 Select Reconciliation Level as either Room or Sub-location based on Step 3 (Sub-location preferred) 3 Select Full / Partial Options: Full Reconciliation (preferred): Process all containers (scanned and unscanned) Partial Reconciliation: Process ONLY scanned containers. Unscanned containers will remain as is. 4 Tick Change owner of scanned containers to scanned user only when needed (optional) This function might be helpful when you need to change ownership of a bulk of containers after someone leaves UNSW.	  

Review scanned data

5 Review the table to ensure you have successfully uploaded all scanned data.

- Sublocations you have scanned
- Number of containers scanned per sublocation
- Number of containers expected (i.e. containers with the status of Available and In Transit in the system)

6 Select all scanned location → Click **Preview Reconciliation**.

In the Preview Reconciliation page, you can:

- View details of reach container scanned and the status of the reconciliation
- View Summary Statistics that gives you description of reconciliation status
- Delete duplicated items marked as “scanned multiple times”
- Export Displayed Data to save a local copy

Containers and Materials • [Container Inventory Reconciliation](#)

Reconciliation Level: Sub-location ☐ Show Only My Primary Site Full / Partial Options: Process all containers (Scanned and Unscanned) - Full Reconciliation

Selected Locations 0 / 2 ☐ Change owner of scanned containers to scanned user

	Action	Location	# Containers Scanned	# Containers Expected
☐		BABS-D26>1>101>Non-Haz Draw 1	4	55
☐		BABS-D26>1>101>Non-Haz Shelf 2	1	48

Containers and Materials • [Preview Reconciliation](#)

Show: All Containers 4 Results

2 sub-location(s) have been selected to be reconciled. A **partial reconciliation** of those locations will be performed. The owner of the containers **will not change**.

Selected 0 / 4 Results

Scanned Location	Bar Code	Label Name	Reconciliation Status	System Location	Owner Name	Container Status	Scanned User Name	Room Acquired Date	Supplier	Amt/Unit	Scanned Multiple Times
☐ MWAC-D26>3>312>Flam Liq Cab 1	114602	Malachite green (250)	Mismatched	MWAC-D26>3>312>Tox Cab 1	Michie, Katharine	AVAILABLE		31/10/2019	Sigma-Aldrich Pty Ltd (UNSW Stores)	25 G	
☐ MWAC-D26>3>312>Corr Cab 1>Shelf 1	1833184		Not in System								
☐ MWAC-D26>3>312>Corr Cab 1>Shelf 1	565374	p-Phenylenediamine	Mismatched	UNSW Canberra Science>21>1>120>Cpd 1	Pashley, Richard	AVAILABLE		2/08/2018	Sigma-Aldrich Pty Ltd	50 G	✓
☐ MWAC-D26>3>312>Corr Cab 1>Shelf 1	565374	p-Phenylenediamine	Mismatched	UNSW Canberra Science>21>1>120>Cpd 1	Pashley, Richard	AVAILABLE		2/08/2018	Sigma-Aldrich Pty Ltd	50 G	✓

Summary of Inventory Reconciliation

1 sub-location(s) have been selected to be reconciled.
A **full reconciliation** of those locations will be performed. Containers not scanned will be set to In Transit.
The owner of the containers **will not change**.
Based on the information above, the following details will be performed by the reconciliation process:

Reconciliation Status	Description	Counts
Matched	Container scanned location same as system location	4
Mismatched	Container scanned location different from system location	0
Not scanned	Containers in location not scanned during reconciliation	51
Not in system	Scanned containers not in the system	0
Disposed	Scanned containers with status of Disposed or Disposed Empty	0
Moved after upload	Containers moved after the inventory reconciliation file was uploaded	0
Disposed after upload	Containers disposed after the inventory reconciliation file was uploaded	0

Total containers to process - 55

Reconcile all records

7 Click **Reconcile All Records**.

Jaggaer will automatically update containers' details based on reconciliation summary, which include:

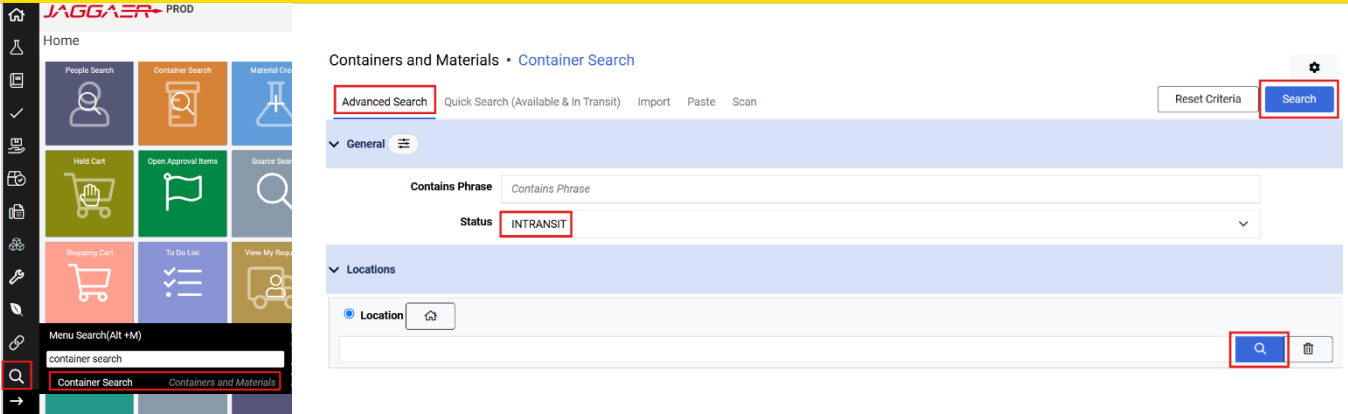
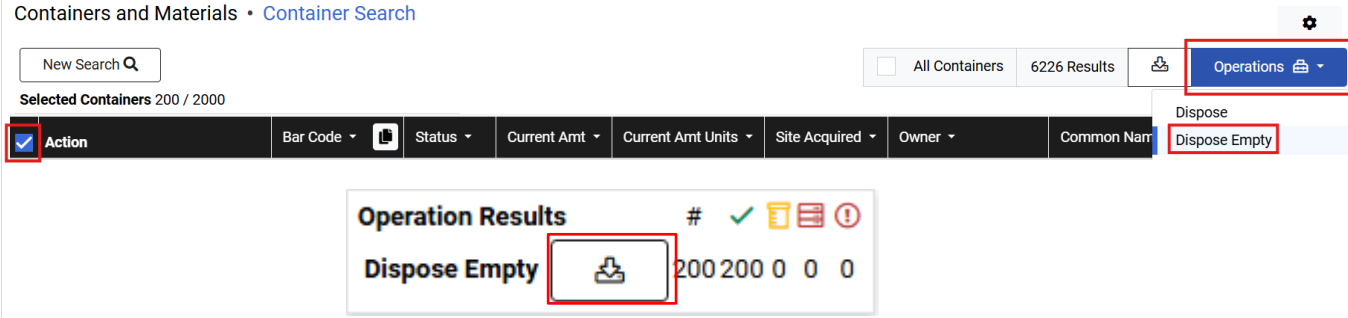
- Status
- Last inventoried date (today's date)
- Location and/or owner

Container status will be updated as below:

- **Matched:** Refers to containers that were found on-site and in-system. Keep container status as Available.
- **Mismatched:** Refers to containers found on-site and in-system, but with different locations. Keep container status as Available and transfer to the new audited location.
- **Not scanned:** Refers to containers not found on-site but exists in-system. Change container status to Disposed.
- **Disposed:** Refers to containers that were on-site but marked as Disposed in-system. Change container status to Available.

Step 5. Dispose Containers with In Transit status

Containers not scanned during audit are likely to be physically disposed of. Hence, please make sure you dispose in Jaggaer to avoid leaving containers in "In Transit" status that affects your audit accuracy.

Steps	Screenshot
1 From the left panel, Menu Search for Container Search → Advanced Search. Filter by Status: In Transit and Location: enter in scanned location → Click Search.	
2 Select all → Click Operations > Dispose Empty to dispose of all containers that are not scanned during inventory audit.	
3 Once completed, click  in the popup message to download the operation results for recordkeeping purpose.	

Handheld Mobile Scanner Hardware

Android Scanners can be used to perform certain container and stockroom functions. RMM Handheld application is installed on Android Scanners to allow the user to scan barcodes and transmit that information from the scanner to Jaggaer via a wireless (Wi-Fi) connection.

RMM Handheld application has been tested on the following devices running Android 5 and later.

- Zebra TC21, TC22, TC52x
- Honeywell CK65, CT45 (only supported up to Android 10)
- Zebra MC3300

While the RMM Handheld application has only been tested on the above specific devices, the application should be compatible with any currently supported Zebra or Honeywell device running Android. It is strongly recommended to test the RMM Handheld application on any device before making purchases of that device.

For questions about support for a specific Android device, please contact JAGGAER Support.

Handheld Mobile Scanner Configuration

See user guide [Android Scanners Application Guide](#).