

# Research Equipment Catalogue User Guide

## Contents

Click a heading to jump to the relevant section of the user guide:

### [Everyday use of the Catalogue](#)

- [Signing in, browsing and searching for items](#)
- Making item enquiries

### [Managing Users and Catalogue Access Rights](#)

### [Catalogue Administration](#)

- Adding new items (for Departmental Administrators)
- Filling in item record fields
- How to list facilities
- How to edit or delete items (for Departmental Administrators and named item owners)
- Using Wikitext to format descriptions
- Running reports (Departmental Administrators only)

### [Glossary](#)

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## Everyday use of the Catalogue

### Signing in, browsing and searching for items

To access the Equipment Catalogue, visit [www.research-equipment.ucl.ac.uk](http://www.research-equipment.ucl.ac.uk). Whilst a selection of items can be viewed without signing in, to view the full inventory, click 'Sign in' on the black bar at the top and enter your UCL username and password.

The buttons on the black bar at the top list items by manufacturer, department and by facility. Click on these buttons to browse through item listings.

If you know what item you are looking for, or have any information that would describe the item, use the search box in the navigation bar at the top of the page. Simply type in your search term and click the magnifying glass, or press Enter.

The catalogue software will search through the database looking for matches to the manufacturers, models, descriptions, specifications, techniques, acronyms and keywords. If the database recognises the terms of your search, it will return an item listing page with all

items that matched the search term(s). Once you have found a relevant item in the search results page, click on its title, photograph, or the 'more details' link underneath the short description to be directed to the item's detail page.

[Back to top](#)

## **Making item enquiries**

To enquire about or request the use of an item, use either the browse or search function to find the desired item and click on it to view its full record. Then, in the top right you will see a green 'Enquire' button. To make an enquiry, click this button.

After clicking on the 'Enquire' button, you will see the Enquiry form. To submit an enquiry, be sure to fill in the required fields (indicated with a \*), and provide as much information as necessary to support your request. You will notice that the Equipment information and your name/email are pre-filled. After completing the form, click 'Send Enquiry' to submit it. It will be automatically emailed to the item owner(s), with a copy sent to you.

[Back to top](#)

## **Managing users and Catalogue access rights**

In the equipment catalogue software, user permissions are assigned to allow equipment from all departments to be imported accurately and efficiently, stored securely, and maintained effectively. The user levels and their descriptions are given below.

### **Catalogue User Permissions**

<b>User Level</b>	<b>Access Rights</b>
Departmental Administrator	Can edit all item field records of any item within a specific department, can add items to and delete any item from their own department. Can also extract reports on items in their department.  Departmental Administrators and Managers will be assigned catalogue administrative permissions for their department, but if you are not sure who the configured administrator for your department is, or would like to configure additional individuals as administrators please contact <a href="mailto:researchservices@ucl.ac.uk">researchservices@ucl.ac.uk</a>
Item owner	These are the person(s) named as the primary or secondary contacts for a particular item. Item owners can edit all item fields of any item their name / UCL email address is associated with, and can also delete that item.
UCL signed in staff and students	The catalogue is integrated with the UCL single sign on system. After signing in with their UCL username and password, users can view all items in the

	catalogue and download any additional files attached to an item (e.g. manuals and datasheets).
Public	Members of the public can view and make enquiries about only those items whose visibility has been set to 'Public' by the item owner / departmental administrator. Members of the public can only view limited information about each item - they cannot see full contact or location details, nor download any additional files associated with an item.

[Back to top](#)

## Catalogue administration

### Adding new items (for Departmental Administrators)

There are two methods by which the Research Equipment Catalogue can be populated with equipment data:

1. Items can be added manually using the editing form built into the administrative interface.
2. Equipment data can be imported into the Catalogue from Comma Separated Values (CSV) files, which are easily generated from Microsoft Excel spread sheets and other information systems and databases.

### Adding Items in bulk via a CSV spreadsheet

If your department would like to add multiple items in bulk, please contact us (researchservices@ucl.ac.uk) for assistance. We can supply an upload template spreadsheet for you to complete and return to us. Please note that images and additional files (any supporting documentation, manuals etc.) will still have to be added manually.

When you receive it, open it in Microsoft Excel, and complete the fields, using the guidance table below to help you. Remember, you must complete the following fields: **Title** and/or **Manufacturer, Model, Contact 1 Name and Email, Access, Department, Site**. Once you have completed the CSV table with at least the required fields, save it with the name of your department and return it to us. We will double-check the spreadsheet for consistency and contact you to resolve any issues. When your items have been uploaded, we will contact you to let you know. You will then be able to add any photographs or supporting documentation through the online editor (provided you have the requisite catalogue permissions to do so).

### Using the Item Editor

To create a new item using the Item Editor (only for configured Departmental Administrators), go to your department's page (after logging in, click 'Departments' on the black bar at the top, then find your department in the tree and click on it). A blue 'add an item' button should be visible above the list of items. Click on this button to access the Item Editor.

Once the Item Editor page loads, simply type the correct information into each field and click any of the 'Save changes' buttons on the page to add the item to the database.

If a departmental administrator does not have all of the information to complete the item record, they should complete the mandatory fields, providing name(s) and email address(es) for the item contact. The individuals named in these fields are automatically able to edit any listing their name is associated with, after logging into the catalogue with their own UCL credentials. This is necessary because item owners do not have the ability to create items, only to edit pre-existing ones assigned to them.

[Back to top](#)

### Filling in item record fields

Whilst there are two methods of importing items (CSV spreadsheet and the on-screen Item Editor), the information you need to provide is the same for both of them. However, when filling in the CSV spread sheet there is less on-screen guidance as to which fields are mandatory. Below is a guide to the available fields, detailing what information can be entered for each one, and by specifying whether it is mandatory, recommended or should be left blank. **Note that 'Category' should be left blank, as we have not defined a standard set of UCL-wide categories. Also, for security reasons, 'Room' details should not be provided, as the software does not currently allow us to reserve this information to signed-in users.**

N.B. The web-based Item Editor is the only option available for editing existing items, and for adding photographs or additional files.

### Item fields

Item Field	Information Type	Necessity	Description
Title	Any text (<250 characters)	Mandatory (if Manufacturer is left blank)	A suitable name for what the item is. If you do not input a title, the software will automatically use the Manufacturer and Model as a title.
Manufacturer	Any text (<250 characters)	Mandatory (if title is left blank)	The item manufacturer's name
Model	Any text (<250 characters)	Mandatory	The item's model name / number
Organisational Unit (Department)	Choose your department from the drop-down list. If completing the CSV spread sheet, please check the defined list of departments and enter department	Mandatory	The UCL department in which the item resides.

	name exactly as shown.		
Visibility	Either 'Internal' or 'Public' - choose from drop-down in item editor, or enter the words 'Internal' or 'Public' as appropriate in the spread sheet.	Mandatory	'Internal' items can only be viewed by signed-in UCL staff and students. 'Public' items can be viewed by anyone.
Contact Name	Any text (<250 characters)	At least one is Mandatory	The person(s) who own or look after the equipment. Up to two contacts can be defined; these could be the PI, the lab manager or technician. These contacts will receive any enquiries coming via the catalogue enquiry form.
Contact Email	This must be a working UCL email address, ending '@ucl.ac.uk' for contacts to be automatically granted editing privileges for their items.	At least one is mandatory.	Email address(es) of the contact(s) for an item. These addresses will receive email notifications when enquiries are submitted via the catalogue.
Access	Specify one of the following: <b>-Staff only</b> (access restricted to facility staff running experiments on users' behalf) <b>-Staff-assisted</b> (users operate equipment with assistance from facility staff) <b>-Self-service</b> after training (users can operate equipment independently after appropriate training) <b>-Open access</b> (access can be arranged without special training necessary) <b>-Enquire for details</b>	Mandatory	The permission level which states who is able to use an item.
Site	Select the UCL site where there item is located from the drop-down menu, or consult the defined list if completing the CSV.	Mandatory	The UCL site where the item is located. This must correspond to one of the sites preconfigured in the system.

Short description	Any text (<250 characters)	Highly recommended	A brief description that displays in search result listings.
Full description	Any text (<65000 characters). Can be formatted with Wikitext.	Highly recommended	A thorough description of the item and any relevant details necessary to explicate the features and functions of the item. Appears in the detailed equipment view page.
Specification	Any text (<65000 characters). Can be formatted with Wikitext.	Highly recommended	Quantified information about the performance and capabilities of the item.
Technique	Any text (<250 characters)	Recommended	The scientific methodology, principle or technique that the use of an item requires.
Keywords	Any text (<250 characters) separating each word or clause with commas.	Recommended	Words not mentioned in the other fields that could also describe a piece of equipment - e.g. a fume cupboard could also be known as a safety cabinet.
Availability	Any text (<250 characters)	Recommended	Specifies when the equipment is typically available for use.
Building	In the Editor, select the building name from the drop down menu. If completing the CSV spread sheet, enter the exact building name from the defined list.	Recommended	The building in which the item is located.
Copyright notice	Any text (<250 characters)	Recommended if you will be uploading any third-party files to the catalogue (e.g. manuals)	If you are using materials from third-party sources (e.g. manuals from manufacturer's website), then you must ask permission to upload them.
Additional files and documentation	Any .jpg, .gif, .pdf, .doc, .docx file up to 20MB in size.	Recommended	You can attach an image you have taken, a file you created, or images and documentation you have downloaded from a third-party source to supplement the information associated with the item (e.g. a user manual, datasheet, brochure). You can upload any number of files per item. The software will automatically sort images from documents.
Upgrades	Any text (<500 characters)	Optional	Information about post-purchase upgrades to the item.

Future upgrades	Any text (<500 characters)	Optional	Information about planned upgrades to the item.
Manufacturer's website	Working web address, starting with 'www.'	Optional	The software will automatically add 'http://' if you do not.
Acronym	Any text	Optional	Any abbreviation(s) used to refer to the item.
Tags	Any text, but join separate words together and separate each tag with commas.	Optional	The software automatically adds a hash tag (#) to each words and displays tags in a box on the detailed item page. Use tags to group equipment by particular research areas.
Parent facility	Tick the check box 'Yes' in the Item Editor if the entry is to be listed as a Facility.	Optional (Mandatory for a parent facility.	Makes the listing a 'Parent' facility - allowing other items to be associated under it. Set to 'No, this is just a normal item' by default.
User group	Any text (<250 characters)	Optional	The most frequent users of the item.
Restrictions	Any text (<250 characters)	Optional	Any binding restrictions on use of the item, e.g. specialised certification or training, health and safety considerations etc.
Portability	Any text (<250 characters)	Optional	If any details on portability need to be stated, enter them here.
Training	Tick 'Yes' (if applicable) in the item editor, or type either 'Yes' or 'No' into the CSV.	Optional	Is specific training to be undertaken before the item can be used?
Training provided?	If training is provided, tick the check box in the item editor, or enter either 'Yes' or 'No' in the CSV.	Optional	Is training provided by the item owners / contacts?
Calibrated	Tick the check box in the editor if 'Yes'; enter either 'Yes' or 'No' into the CSV.	Optional	Is the item calibrated?
Last Calibration Date	In the editor, enter the date via the drop-down menu. In the CSV, enter the date in DD/MM/YYYY format.	Optional	When was the item calibrated?
Next Calibration Date	In the editor, enter the date via the drop-down menu. In the CSV, enter the date in DD/MM/YYYY format.	Optional	When is the item scheduled for calibration?
Quantity	Enter the applicable numerical character	Optional	How many of the item are there?

Quantity Detail	Any text (<250 characters)	Optional	Further details regarding the multiple items.
Asset number	Any text (<250 characters)	Optional	The asset reference number used on the year-end finance asset list.
Finance ID	Any text (<250 characters)	Optional	The financial reference or purchase order number.
Grant Code	Any text (<250 characters)	Optional	The code specifying the grant used to procure the equipment.
Serial Number	Any text (<250 characters)	Optional	The unique serial number on the item.
Year of Manufacture	Numerical text in 'YYYY' format.	Optional	The year in which the item was made.
Supplier	Any text (<250 characters)	Optional	The organisation from which the item was purchased. Select from a drop-down list or type a new supplier.
PAT Expiry Date	In the editor, enter the date via the drop-down menu. In the CSV, enter the date in DD/MM/YYYY format.	Optional	The date the item is scheduled for PAT testing.
Purchase Cost	Any text (<250 characters)	Optional	The cost to buy the item from the supplier.
Date of Purchase	In the editor, enter the date via the drop-down menu. In the CSV, enter the date in DD/MM/YYYY format.	Optional	The date the payment for the item was transferred to the supplier.
Replacement Cost	Any text (<250 characters)	Optional	How much the item would cost to replace.
Expected End of Life	In the editor, enter the date via the drop-down menu. In the CSV, enter the date in DD/MM/YYYY format.	Optional	The expected date when the item will need to be replaced.
Maintenance	Any text (<250 characters)	Optional	Details of any maintenance agreements, contracts or costs.
Has Been Disposed Of	Select from the drop down list in the editor, or in the CSV enter, 'Yes, sold on.', 'Yes, scrapped', or 'No, still in service.'	Optional	Set to 'No, still in service' by default.  <b>N.B. A bug in the system currently prevents this from being changed - it will be rectified in the next software release.</b>
Comments	Any text	Optional	Comments or further information about the item
Embedded HTML content	Embedding links	Optional	Use this field to embed videos and other resources like Twitter



			updates, YouTube videos, RSS feeds etc.
Links	URL address and link title	Optional	Enter links to external websites and other internet resources here. Provide a title for the link if you wish. Add as many links as required by clicking the 'More links' in the item editor.

[Back to top](#)

## How to list facilities

The 'Parent Facility' option in the Item Editor enables you to group multiple pieces of equipment together. This is more logical than listing a suite of equipment as an ordinary, single item, which creates consistency errors and complications when facilities contain equipment with more than one manufacturer or model. The items associated with a Parent Facility can be maintained and edited separately.

Making an item a facility changes a few important factors; most importantly, you do not have to enter a manufacturer or model. This is why facilities cannot be created through the CSV spreadsheet.

To make a facility listing:

1. Create a new item using the Item Editor as usual.
2. Type in the facility title, contact, department, building and room, access and visibility. It is also advisable to enter descriptions and specifications and any other relevant information.
3. Tick the check box in the 'Parent Facility' section of the form which states 'Yes, this item is a parent facility.' Click 'Save Changes'. You can now add any photographs or additional files.
4. To associate individual equipment items with the facility, create the item in the usual way (via the 'add an item' button visible on the department's page - only Departmental Administrators can do this). To associate an already-created item with a facility (Departmental Administrators and the named item owner can do this), click the 'edit' button on the relevant item's page, scroll down to the 'Parent Facility' section, click the 'Associate this item with one or more parent facilities' check box, select the appropriate facility and save changes.
5. When you view the facility listing, it will appear as a normal item, except underneath the description and specifications there will be a list of all the items in the facility, each linked to their individual item listing page. Likewise, on the individual item pages there will be a box stating the facility/facilities the item is associated with.

[Back to top](#)

## How to edit or delete items

Departmental Administrators and named item owners can edit or delete items that have already been created. To edit or delete an item, find the relevant item by searching or browsing, and then click the blue 'edit' button located in the search results or on the relevant item's page. Make any necessary changes and click 'Save Changes' to edit, or click 'Delete item' on the top right to delete the item. Deletions cannot be undone.

[Back to top](#)

## **Running Item Reports (Departmental Administrators only)**

The Equipment Catalogue software allows configured Departmental Administrators to run customised reports on the items in their remit. In order to generate reports:

1. Log into the catalogue with your UCL username and password.
2. Click 'Administration' under the UCL logo (will only be visible if you are a configured departmental administrator).
3. Click on 'Reports' in the box on the right.
4. Select 'Inventory' from the options. On the subsequent page choose the filtering options to restrict your report (if necessary) to a given Manufacturer, Building, Staff Contact or Visibility.
5. After selecting any filters, in the selection below select the fields you would like your report to contact. Use the on screen arrow keys to move the desired fields into the box on the left. You can also reorder the fields in the report by using the up and down buttons.
6. Finally, in the 'Order by' section, you have the option of sorting the report results by a maximum of three parameters. For each you can choose to sort results in an ascending or a descending structure.
7. Once you have configured the report to your satisfaction, you can view it online by clicking 'View Report' or download it as a CSV file (a Microsoft Excel-compatible spread sheet).

[Back to top](#)

## **Glossary**

A detailed glossary can be viewed below:

### **Glossary**

Access

Access can refer either to the permissions granted to each type of user when using the Kit-Catalogue software, or it can refer to the permission levels allocated to each item that explicate who can request the use of an item.

Acronym	An abbreviation for an item, formed by grouping the initial letters from each word in the name of an item, e.g. Global Positioning System = GPS.
Administrator	<p>There are three types of administrator:</p> <ul style="list-style-type: none"> <li>- System Administrator: Users with permissions to to set up all customisable categories, add, edit, transfer and delete items, run reports, and maintain the catalogue front-end.</li> <li>- Departmental Administrator: Users with permissions to add and edit all items attributed to a particular department in the catalogue.</li> <li>- Custodial Administrator, or Item Owner (see 'Custodian').</li> </ul>
Availability	Provides the user with information about when, or to whom an item maybe available for use.
Building	The structure, situated within a 'Site' in which an item is housed.
Calibrated	Either Yes, No, Automatic, or Not Applicable. This specifies whether an item has been assessed and graduated precisely so that readings taken from it are accurate and absolute, and not relative to a given inaccuracy.
Child Item	See 'Item' and 'Facility'
Copyright Clearance	When you upload a manual, brochure, photograph or any other file sourced from a third party website, you must request permission to do so as these materials are often copyright-protected. This field enables you to show that you have permission to use the material for the purposes of the Research Equipment Catalogue.
Core Field (Mandatory Field)	A data field that is hard-coded into the software and which must be completed when adding a new item. Core fields contain information considered necessary to provide a comprehensive item listing.
CSV	An acronym for Comma-separated Values, which is a file type used to store tabular (spreadsheet) data in plain-text form. This type of file can be opened with Microsoft Excel and is used when administrators import items in bulk. A template CSV is completed and uploaded to populate the catalogue in bulk.
Custodian	Item custodian(s) are the persons who manage and maintain each item in their jurisdiction. As the Research Equipment Catalogue is integrated with the UCL single sign on system (see LDAP / Active Directory), the individual(s) named as custodians in the catalogue can edit or delete any item that their name is associated with. Custodians are not able to add new items to the catalogue, and should consult the assigned catalogue administrator in their department to arrange this.

Custom Field	A data field added into the Kit-Catalogue software by a System Administrator. The 'Grant Code' field has been added as a custom field, to allow information on the grants associated with a particular piece of equipment to be recorded.
Department	A unit within the Organisation; a division of a larger institution separated by function or discipline.
Description	Words providing detailed information on an item. There are two types of description in the catalogue software: a short description which is displayed on the item listing pages and a full description, which appears on the detailed item view page.
Equipment	These can be scientific instruments, workshop machines, safety apparatus, in fact any items that can be used for a specific or specialised function.
Facility	A collection of separate individual items (child items) connected or working together to form a system (parent item) for a particular process. It includes rigs and testing systems, but also includes equipment suites (e.g. an anechoic chamber or darkroom).
Item	An individual piece of research equipment.
Keywords	Words that are associated with the item that may or may not be included within the item listing page to help users search for the item.
LDAP / Active Directory	Also known as the UCL single sign on system. The UCL Research Equipment Catalogue has been LDAP-integrated, allowing anyone with a UCL username and password to sign into the catalogue and view all listed items. This integration automatically grants named equipment owners (Item Custodians) permissions to edit their equipment records, and allows departmental administrative permissions to be assigned to individuals.
Manufacturer	The organisation / company that constructed the item.
Manufacturer's Website	The space on the internet where the organisation that produced the item hosts documents and information about their company and products.
Model	The name, number or code given by a manufacturer to distinguish between the different types of item that it makes.
Organisational Structure / Organisational Unit	The organisation structure refers to the way the organisation is split into separate units; schools, departments, etc. This structure is shown on the 'Departments' page in the catalogue, as an organisational tree.
Parent Item	See 'Facility'

PAT Date	Portable Appliance Testing, scheduled annually to check the safety of electrical appliances.
Permanent Link (Permalink)	A web link (URL) pointing directly to a specific item or facility listing. This can be obtained from the 'Permanent Link' box on any item or facility page. Can be copied and pasted to provide others with a direct link to an item.
Quantity	How many of the particular item there are in a department which have the same details (excepting financial, servicing and serialisation information).
Quantity Detail	Further information about the item quantity (e.g. are the multiple items used for different applications).
Reports	Information tables extracted from selected aspects of the database, available to system and departmental administrators via a web-based interface, or a downloadable CSV spread sheet.
Room	Refers to the item's specific location within a building. At the present time it is not possible to hide room information publicly; Administrators are therefore asked to omit room details when adding new items.
Serial Number	The unique code assigned to an individual item by the manufacturer.
Site	The UCL Campus (or location) that contains the building in which the item is located. The following sites are defined, 'Bloomsbury Campus', 'Institute of Child Health', 'Ear Institute', 'Eastman Dental Institute', 'Institute of Neurology', 'Institute of Ophthalmology', 'Inst of Orth and Musc-Skel Science.', 'Hampstead Campus', 'Archway Campus', 'Other'.
Specification	Quantified information about the item's properties and performance.
Supplier	The organisation or company from which an item was purchased.
Tags	Tags are another way of grouping items and use the has tag '#' symbol to define the tag. Tags can be used to group items by a particular research area and so, unlike categories, can be used to collate items of different types.
Technique	The method, principle or procedure undertaken when using an item.
Title	The words which best describe the item as what it is commonly known as, usually with regard to its function or type rather than manufacturer or model name.
Training	The procedures that must be undertaken by potential equipment users so they acquire the necessary skills to operate the item. The catalogue

software allows item owners to specify whether training is required to use an item, and whether they offer such training.

User (end-user)	The people who use the Equipment Catalogue software. There are five types of user, each with different access permissions in the software.
Visibility	This data field allows administrators to determine whether they want an item to be visible to the general public or internally to UCL staff only.
Wiki-text	The simple coding language used to write and format the description and specification fields for each item.
Year of Manufacture	Refers to the year in which the item was constructed.