ENTERPRISE REAGENT MANAGER
VERSION 9.3.0

RELEASE NOTES FOR ERM VERSION 9.3.0
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ENTERPRISE REAGENT MANAGER
VERSION 9.3.0

PREPARED BY

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<table>
<thead>
<tr>
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<th>AUTHOR</th>
<th>CHANGES</th>
</tr>
</thead>
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<tr>
<td>15-Dec-17</td>
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<td>Creation for Version 9.3.0</td>
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Introduction

This document lists enhancements and modifications for Enterprise Reagent Manager (ERM) 9.3.0. The baseline for comparison is ERM 9.2.1. Unless explicitly noted otherwise, all sections of this document pertain to ERM Researcher. Please also read the following documents for important information for this release:

**ERM Upgrade Guide**
Details functional items to be considered when upgrading.
For on-premise ERM environments, also details how to upgrade the ERM environment.

**ERM Installation Guide**
For on-premise ERM environments, use this document in conjunction with the ERM Upgrade Guide to upgrade the ERM environment.

**Note**
Some permissions have been renamed for ERM 9.3. Please see the Appendix for old and new permissions.

**Documentation Note:** the pictures of ERM pages featured within this document may differ somewhat from their appearance in the application. The pictures have been edited to fit into the space allowed.
Summary of Major Enhancements

The following lists the major enhancements for ERM Researcher 9.3.0. Details on these and other enhancements for ERM Researcher and all other modules are provided in the rest of this document.

Storeroom Request Fulfillment

This release introduces the migration of storeroom request fulfillment functionality from the ERM Operations module (where it was referred to as Delivery Request) to ERM Researcher.

In addition to migrating existing functionality, storeroom fulfillment technicians now have the ability to monitor request activity for their storerooms with the new Storeroom Pending items panel on the ERM Researcher Home Page. This feature gives immediate visibility to pending requests for a technician’s storeroom.

Storage Compatibility

Expanding on ERM’s existing Storage Code concept, ERM 9.3 introduces new Storage Compatibility checking, to help promote a safer lab workplace. You can now identify the permitted storage codes for locations, and ERM will help ensure that containers are stored in compatible locations. This new feature consists of the following:

- Storage codes can be assigned to locations, from site down to sub-locations. Locations that do not have storage codes assigned will inherit the storage codes of parent locations.
- Locations without storage codes will accept all containers
- Easily view and quickly navigate to locations in the hierarchy that have direct storage code assignments, and edit assignments as needed
- Prevent requestors from selecting incompatible deliver-to locations for requested containers
- Warn users when they transfer containers to incompatible locations.
- Report (scheduled or ad hoc) on containers that are currently in incompatible storage locations
Container Rules and Operations

Container rules operate below the level of permissions, to determine which containers a user is permitted to act on. ERM 9.3 introduces a completely *new* rules engine approach that is more accessible and usable than in previous versions.

- Simple click-to-build user interface for reviewing and editing container rules
- Container rules are automatically enforced when performing container operations
- Create rules based on the operation and characteristics of the container and/or user – specifying only those combinations that you want to prohibit.
- Build rules applicable to multiple container operations at the same time
- ERM now supports additional rule criteria as compared to the rules engine in earlier releases

Container Search

The Lab Inventory and Container Operations pages in ERM 9.2 have been replaced with a new and more powerful Container Search function:

- Choose quick or advanced search
- Return large search results and export the result set
- Sort the result set by multiple columns
- Import or paste lists of containers
- Perform container operations on all or selected containers in the result set
- Background execution of large-scale container transactions frees the user quickly to perform other tasks
Receiving

This release completes the migration of the receiving fulfillment functionality from the ERM Operations module to ERM Researcher. Previously, ERM Researcher was capable of handling receiving external requests destined for researcher labs. ERM Researcher now processes Stockroom Replenishment requests.

Additionally, new Receiving functionality not previously available in ERM Operations has been introduced. With this release, Receiving allows:

- One-click processing of non-chemical requests
- Weighing of liquid containers
- Enhanced request editing capabilities

On Line Help

On Line Help is now available in ERM Researcher.
Storeroom Request Fulfillment

Previously a top-level tab in ERM Operations called Delivery Request, the process to fulfill requests for containers from storerooms has been migrated to ERM Researcher and renamed Storeroom Request Fulfillment. As of the 9.3 release, all Delivery Request processing functionality has been removed from the ERM Operations module.

Note: In ERM 9.2 Operations, the Delivery Request function supported the dispensing of amounts from a storeroom container into other containers. This functionality has been temporarily removed from ERM, and will be added back in a future release.

Overview of Storeroom Request Fulfillment

The Storeroom Request functionality is now separated into two distinct processes, Storeroom Pending Items and Storeroom Closed Items. Users with the ERM Researcher Storeroom Request Fulfillment permission (formerly called Display Delivery Request Tab) will be able to process storeroom container requests. Additionally, they will see the new ‘Storeroom Pending Items’ panel on their ERM Researcher Home Page. This new Home Page panel will give the Storeroom Technician an immediate overview of any open container requests for storerooms at their site.

Users with the new ERM Researcher Storeroom Closed Items Search permission will have access to the Storeroom Closed Items window. A storeroom technician with this permission can search for ALL storeroom fulfillment requests which are not open (status fulfilled or closed). This search is intended mainly to allow storeroom technicians to investigate requests that the user reports are missing to determine what happened.

Storeroom Request Fulfillment Process Flow

1. From the ERM Researcher Home Page, the Storeroom Technician selects a storeroom that has open requests that need to be fulfilled
2. The Storeroom Pending Items window is opened displaying all storeroom requests with a status of New or Sent
3. From this window the technician can view all details related to a request and perform all operations necessary to fulfill the request
Storeroom Pending Items – Home Page

Users with the **ERM Researcher Storeroom Request Fulfillment** permission will see the new ‘Storeroom Pending Items’ panel (shown below) on their ERM Researcher Home Page. This new Home Page panel will give the Storeroom Technician an immediate overview of any open storeroom requests at their site and its related sites. The Storeroom Pending Items Home Page panel will display a list of those storerooms that currently have requests that need to be processed/fulfilled.

The Storeroom Pending Items Home Page panel will:

- Display every storeroom that has at least one open storeroom request
- Only display storerooms at the technician's site and related sites (the users All Sites/My Sites preference is not used)
- Not display list-controlled storerooms that the technician does not have permission to access

Each listed storeroom will also show a count of the number of open request items awaiting processing. By simply clicking on the one of the displayed storerooms, the technician will open the Storeroom Pending Items processing window with all of the open requests retrieved for the selected storeroom.
Storeroom Pending Items – Processing Window

A storeroom technician with the ERM Researcher Storeroom Request Fulfillment permission can access the Storeroom Pending Items window (shown below) to search for open ERM Storeroom Requests with the intention of fulfilling the request. The technician can access this window by:

- Selecting a storeroom from the Storeroom Pending Items panel on the Home Page
- Selecting the Storeroom Pending Items option from the Inventory Services section of the Main Menu. This will open the Storeroom Pending Items window displaying the results from the last storeroom accessed on the Storeroom Pending Items window – regardless of whether there are currently requests awaiting processing. (As with all menu items, the user can configure ERM Researcher to display as a tile on the home page).

Regardless of how the technician accesses the Storeroom Pending Items window, from within the window they can choose a different storeroom in which to process requests.
Each row in the result set is selectable via a checkbox and has a drop-down menu to access various actions and information.

**Search Criteria**

**Search Storerooms**

The storeroom technician can search for items to process by selecting a storeroom from the “Storeroom” widget. This widget will list all storerooms that the technician can access, constrained by their My Sites/All Sites preference selection. All storerooms will be listed, even those which do not currently have open requests. Storerooms with open request will show the number of open request in parenthesis. The above picture shows that the selected storeroom has 74 open request items.
**Search Terms**

The technician must always select a storeroom to search on the Storeroom Pending Items window. In addition to the storeroom, a technician can also refine their results by providing search terms. ERM uses a search engine to search for storeroom request items to process. The search engine will search the following fields on the request item:

- Brand Name (Manufacturer)
- CAS #, MDL #, SQ Chem Number, Customer Compound ID
- Catalog #
- Creator last name, first name, e-mail
- Manufacturer Part #
- Product Name (Description)
- Purchase Order #
- Recipient last name, first name, email
- Requestor last name, first name, email
- Request #
- Shopping Cart Name
- Supplier

**Known Issue:** Please read the known issue section for an issue when specifying a search term using the IE browser.
Determining Rows to Retrieve in Storeroom Request Fulfillment Search

When accessed by selecting a storeroom from the Pending Storeroom Requests display area, all open storeroom requests for the selected room are returned.

When accessed by selecting the Storeroom Request Fulfillment Home Page tile or menu option the following occurs:

- Opens the Storeroom Request Fulfillment window refreshing the page for the currently selected storeroom
- If the user has previously accessed this window during this session, the last selected storeroom is displayed in the Storeroom search criterion field
## Icons on Search Results

The following details the function of each icon on the Storeroom Pending Items result row:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>To select an item to be Fulfilled or printed on the Pick List or Delivery Report, the technician selects the item(s) by clicking on this check box. After selecting all the desired items, the user then clicks the button on top of the page that corresponds with the function they wish to accomplish.</td>
</tr>
<tr>
<td><img src="image" alt="View Details" /></td>
<td>Displays detailed information about the request item. This icon will always be displayed.</td>
</tr>
<tr>
<td><img src="image" alt="View Container Actions" /></td>
<td>Opens the “Actions Required” window. This icon will only be displayed if the requested container is expired, has a status other than 'Available/In Use' or if the container is no longer in the storeroom from which it was requested.</td>
</tr>
<tr>
<td><img src="image" alt="View Warnings" /></td>
<td>This is the same icon as used throughout ERM Researcher to indicate that the item is controlled, radioactive or is on restricted lists. Clicking the icon will open the “Warnings” window which will display warning flags, regulations and Codes of Practice.</td>
</tr>
<tr>
<td><img src="image" alt="View Attachment" /></td>
<td>When an item has an attachment, this icon will be displayed. Clicking this icon will open the attachment.</td>
</tr>
<tr>
<td><img src="image" alt="View/Edit Notes" /></td>
<td>When an item has an internal note, this icon will be displayed. Clicking this icon will open the “View/Edit Notes” window. The storeroom technician can read the notes and also add additional notes.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| ![Icon](image) | **Set to New**  
The ‘Set to New’ icon allows the storeroom technician to reset the status of an item that was incorrectly set to ‘Fulfilled’, ‘Sent’ or ‘Canceled’. |
| ![Icon](image) | **Fulfill Successful**  
The green checkmark is displayed after an item has been processed. |
| ![Icon](image) | **Close/Cancel Successful**  
The ‘Cancelled’ icon is displayed after the storeroom technician cancels a request. |
Menu Options on Search Results

In addition to the icons on each search result row, there are also menu options available for each item. The following details the function of each menu option (shown below) on the Storeroom Pending Items result row:

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ Cancel/Close</td>
<td>For items with status “New”, sets the item status to ‘Cancelled’; For items with status “Sent”, sets the item status to “Closed”. In each case, the status of the associated container does not change. A notification is sent to the requester and recipient informing them that the item has been cancelled or closed. Below is an example of an in-line notification.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date Created</th>
<th>Notification Type</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec 7, 2017 9:08:06 AM</td>
<td>Storeroom Item Processed</td>
<td>Storeroom Request Item WHITELY0000201 has been Cancelled</td>
</tr>
</tbody>
</table>

The following item has been Cancelled.

Description: Methamphetamine, 1 mg/mL in methanol, ampule of 1 mL, certified reference material
Date Submitted: 11/9/15
Delivered Bar Code: 00000301
Supplier: Sigma-Aldrich
Catalog Number: H-015-1ML
Brand: SIGMA-ALEX
Manufactured Part Number: H-015
Pg: 1 mL
Storage Code: N
Substituted: N
Dispensed Container: N
Comments: |

Request #: 265

This is a standard ERM notification and can be received as an in-line notification and/or an e-mail notification. To configure the notification receipt preference, the user would configure the ‘Storeroom Item Processed’ notification on the ‘Change Notification Preferences’ page. |

<p>| 📦 View Container | Opens the container detail window. |</p>
<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View/Edit Notes</td>
<td>Opens the “View/Edit Notes” window. The storeroom technician can read any notes on the request and can also add notes.</td>
</tr>
<tr>
<td>View MSDS</td>
<td>Accesses the safety data sheet.</td>
</tr>
<tr>
<td>Substitute Container</td>
<td>Opens the ‘Substitute Container’ window, allowing the technician to replace a requested container with an alternate container.</td>
</tr>
</tbody>
</table>
**Action Buttons on the Window**

There are four action buttons on the Storeroom Pending Items window. The following details the function of each button option:

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Pick List</td>
<td>Prints a pick list for the selected items.</td>
</tr>
<tr>
<td>Print Delivery Report</td>
<td>Prints a delivery report for the selected items.</td>
</tr>
<tr>
<td>Fulfill</td>
<td>Processes the selected item(s). The following occurs when the ‘Fulfill’ icon is clicked:</td>
</tr>
<tr>
<td></td>
<td>• Prompts the user if they want to print a delivery report.</td>
</tr>
<tr>
<td></td>
<td>• When the delivery location of the item is an ‘auto-Checkin’ room</td>
</tr>
<tr>
<td></td>
<td>• item status is set to ‘Fulfilled’</td>
</tr>
<tr>
<td></td>
<td>• container status is set to ‘In Use’</td>
</tr>
<tr>
<td></td>
<td>• container location is set to the delivery location specified when the request was submitted</td>
</tr>
<tr>
<td></td>
<td>• container ownership is transferred to the recipient</td>
</tr>
<tr>
<td></td>
<td>• When the delivery location is not an ‘auto-Checkin’ room</td>
</tr>
<tr>
<td></td>
<td>• item status is set to ‘Sent’</td>
</tr>
<tr>
<td></td>
<td>• container status is set to ‘In Transit’</td>
</tr>
<tr>
<td></td>
<td>• container ownership is not changed</td>
</tr>
<tr>
<td></td>
<td>• The container use location remains the store room until the container is scanned or manually transferred to the destination.</td>
</tr>
<tr>
<td></td>
<td>• When the container is checked into a room, if the container is checked into the room specified as the delivery location on the delivery request, the status of the item is set to ‘Fulfilled’. If the container is checked into a room other than the room specified as the delivery location, the status of the item is set to ‘Canceled’.</td>
</tr>
<tr>
<td>Menu Option</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>A notification is sent to the requester and recipient informing them that the item has been fulfilled. Below is an example of the in-line notification.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date Created</th>
<th>Notification Type</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec 3, 2017 4:43:23 PM</td>
<td>Storeroom Item Processed</td>
<td>Storeroom Request Item Whiley00000355 has been Fulfilled.</td>
</tr>
</tbody>
</table>

The following item has been fulfilled:
- **Description:** Dimethyl methylphosphonate, 97%
- **Date Submitted:** 12/4/17
- **Delivered Bar Code:** 00000063
- **Supplier:** SpenDier Corporation
- **Catalog Number:** A14266-500g
- **Brand:** Alfa Aesar
- **Manufacturer Part Number:** A14266.36
- **Pkg:** 500 g (500 g)
- **Storage Code:**
- **Substituted:** N
- **Dispensed Container:** N
- **Comments:**
- **Request #:** 815

This is a standard ERM notification and can be received as an in-line notification and/or an e-mail notification. To configure the notification receipt preference, the user would configure the ‘Storeroom Item Processed’ notification on the ‘Change Notification Preferences’ page.

Scan Opens the ‘Container Scan’ window. The user can enter or scan (using a wedge scanner) one or more container bar codes to fulfill a request.
Scan to Fulfill

The scan window is used to fulfill request items by scanning container bar codes.

<table>
<thead>
<tr>
<th>Action</th>
<th>Bar Code</th>
<th>Delivery Location</th>
<th>Recipient</th>
<th>Material</th>
<th>Shopping Cart</th>
<th>Request #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0003467</td>
<td>Bermuda Beach Lab 1-1&gt;Building 1&gt; Bermuda Beach</td>
<td>Whitley, Chemist</td>
<td>6,12-Dibromochrysene</td>
<td>Whitley00000773</td>
<td>1570</td>
</tr>
<tr>
<td></td>
<td>0003478</td>
<td>Bermuda Beach Lab 1-1&gt;Building 1&gt; Bermuda Beach</td>
<td>Whitley, Chemist</td>
<td>6,12-Dibromochrysene</td>
<td>Whitley00000773</td>
<td>1570</td>
</tr>
<tr>
<td></td>
<td>0003475</td>
<td>Bermuda Beach Lab 1-1&gt;Building 1&gt; Bermuda Beach</td>
<td>Whitley, Chemist</td>
<td>6,12-Dibromochrysene</td>
<td>Whitley00000773</td>
<td>1570</td>
</tr>
<tr>
<td></td>
<td>0003466</td>
<td>Bermuda Beach Lab 1-1&gt;Building 1&gt; Bermuda Beach</td>
<td>Whitley, Chemist</td>
<td>6,12-Dibromochrysene</td>
<td>Whitley00000773</td>
<td>1570</td>
</tr>
<tr>
<td></td>
<td>0003446</td>
<td>Bermuda Beach Lab 1-1&gt;Building 1&gt; Bermuda Beach</td>
<td>Whitley, Chemist</td>
<td>6,12-Dibromochrysene</td>
<td>Whitley00000773</td>
<td>1570</td>
</tr>
<tr>
<td></td>
<td>0005675</td>
<td>Bermuda Beach Lab 1-1&gt;Building 1&gt; Bermuda Beach</td>
<td>Whitley, Chemist</td>
<td>[3-(5-methyl-1,3,4-oxadiazol-2-yl)phenyl]boronic acid</td>
<td>Whitley00000786</td>
<td>1581</td>
</tr>
<tr>
<td></td>
<td>0005676</td>
<td>Bermuda Beach Lab 1-1&gt;Building 1&gt; Bermuda Beach</td>
<td>Whitley, Chemist</td>
<td>[3-(5-methyl-1,3,4-oxadiazol-2-yl)phenyl]boronic acid</td>
<td>Whitley00000786</td>
<td>1581</td>
</tr>
</tbody>
</table>

The user can enter or scan (using a wedge scanner) one or more container bar codes. After the user has finished entering/scanning bar codes, they click on the ‘Fulfill’ button. When the ‘Fulfill’ button is clicked the following occurs:

1. Scan looks at each bar code in the scan window, finds its corresponding delivery request item, and then fulfills the item – meaning Scan performs the same function that occurs when the user clicks on the ‘Fulfill’ icon on the menu toolbar.

2. The user is asked if they wish to print the Delivery Report.

3. Notification is sent to the requester and recipient informing them that the item has been fulfilled. Below is an example of the in-line notification.
This is a standard ERM notification and can be received as an in-line notification and/or an e-mail notification. To configure the notification receipt preference, the user would configure the ‘Storeroom Item Processed’ notification on the ‘Change Notification Preferences’ page.

4. The scan window is closed.

The ‘Container Scan’ function does not perform a substitute function; the container bar code must already be assigned to a Delivery Request item.

The following are possible errors when entering/scanning a bar code:

- Container is not assigned to an open request.
- Container does not exist.

**Substitute Container**

A Storeroom Technician can replace a requested container found on a storeroom request item by searching for an alternate container. The technician chooses a storeroom request item in Storeroom Request Fulfillment result set and selects the Substitute Container option to open the ‘Substitute Container’ window shown below.
For the selected Storeroom Request item, the grid in the Substitute Container window shows all containers that have the same material as the requested container with a status of ‘In Use’. The technician can either search for:

- containers in the current storeroom location or
- containers in all storerooms (based on technician’s My Sites/All Sites preference)

By default, when the window opens the result set is populated with containers from the current storeroom.
Show Containers Radio Buttons

The ‘Show Containers In...’ radio buttons will show containers in:

- Current Storeroom
  - the storeroom of the currently selected request item on the Storeroom Request Fulfillment window
  - This is the default option when the window initially opens

- All Storerooms
  - containers in all storerooms (based on technician’s My Sites/All Sites preference)

Results

- Only containers with a status of Available will be returned
- Container results are sorted by Date Created, ascending
- Columns in the result set can be sorted

Substituting a Container

The ‘Substitute Container’ window will display containers with a status of Available; however, an ‘available’ container could still be assigned to another storeroom request. If a container is already assigned to an open request it will be shown in the result set; however, it will not be selectable.

To substitute a container, the technician selects the radio button for the desired row and clicks ‘Save’.

To return to the Storeroom Request Fulfillment window without substituting a container, the technician clicks ‘Close’.
Storeroom Closed Items – Processing Window

A storeroom technician with the **ERM Researcher Storeroom Closed Items Search** permission can search for ALL requests which are not open (status fulfilled, cancelled or closed) via the Storeroom Closed Items window (shown below). This is not an Ad Hoc search for reporting. (Ad hoc reporting can be done in the ERM Operations module via Order Item Search or Requisition Search). This search is intended to allow the storeroom to investigate requests that the user reports are missing to determine what happened. The technician can access this window by selecting the Storeroom Closed Items option from the **Inventory Services** section of the Main Menu. (As with all menu items, the Storeroom Closed Items option can be configured to display as a tile on the Home Page).

The technician can select row(s) via the select check box to reprint a delivery request(s) or they can reset an item back to New (when fulfilled or closed in error) on an item-by-item basis.
Search Criteria

The technician can search for closed storeroom fulfillment requests using a combination of the following criteria:

- **Storeroom** - Drop down listing of all active storerooms that receive requests. As with most location displays, this is bounded by the technician permissions and All Sites/My Sites preference.

- **Deliver-to Location** - Single location selection. Selection of locations is controlled by the technician’s permissions and All Sites/My Sites preference.

- **Date Submitted** (range)

- **Name Search Widget**
  - Creator
  - Requester
  - Recipient

Search Results

The **Storeroom Closed Item** window search will return requests meeting the provided criteria with a status of Closed, Cancelled or Fulfilled. Open Storeroom Fulfillment requests cannot be retrieved on this window.
## Icons on Search Results

The following details the function of each icon on the Storeroom Closed Items result row:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>The green checkmark is displayed after an item has been processed.</td>
</tr>
<tr>
<td>☐</td>
<td>To select an item to be Fulfilled or printed on the Pick List or Delivery Report, the technician selects the item(s) by clicking on this check box. After selecting all the desired items, the user then clicks the button on top of the page that corresponds with the function they wish to accomplish.</td>
</tr>
</tbody>
</table>
| 📄   | Displays detailed information about the request item. This icon will always be displayed.  
View Details |
| 📂   | When an item has an attachment, this icon will be displayed. Clicking this icon will open the attachment.  
View Attachment |
| 🔗   | Once an item has been processed, the status of the item can be either 'Fulfilled' or 'Sent', depending on the delivery location of the requested container. The ‘Set to New’ icon allows the storeroom technician to reset the status of an item that was incorrectly set to 'Fulfilled' or 'Canceled'.  
Set to New |

Set to New Successful
Storage Compatibility

Expanding on ERM’s existing Storage Code concept, ERM 9.3 introduces *new* Storage Compatibility checking, to help promote a safer lab workplace. You can now identify the permitted storage codes for locations, and ERM will help ensure that containers are stored in compatible locations. This new feature consists of the following:

- Storage codes can be assigned to locations, from site down to sub-locations. Locations that do not have storage codes assigned will inherit the storage codes of parent locations.
- Easily view and quickly navigate to locations in the hierarchy that have direct storage code assignments, and edit assignments as needed
- Prevent requestors from selecting incompatible deliver-to locations for requested containers
- Warn users when they transfer containers to incompatible locations
- Report (scheduled or ad hoc) on containers that are currently in incompatible storage locations

Assign Storage Codes to Locations

Storage codes may be assigned to locations via the ‘Assign Storage Codes to Locations’ page. The user needs the ERM Researcher Assign Storage Types to Locations permission to access the page. On upgrades, this permission will be assigned to any role that currently has the System Administrator permission.

The following details storage code assignments:

- A user may assign one or more storage codes to a location at any level, from site down to sub-location. This is referred to as an explicit storage code assignment.
- If a location does not have a storage code assigned to it, the location will inherit the storage code of its first parent in the tree that has a storage code. This is referred to as an implicit storage code assignment.
- Explicit storage code assignments take precedence over any inherited assignments – i.e., a location with an explicit assignment does not inherit any storage codes from any parent locations
- It is not required that a storage code is assigned to a location
The following shows an example of the Assign Storage Codes to Locations Page

These locations are all the locations found under Lab 101 > Aisle2 (the location at the bottom of the location selector on the left hand side).

The user navigates the location tree by clicking on a location (such as "Test Site 1"). Storage codes assigned to a location are displayed next to the location name.

Storage codes in bold mean the storage codes have been explicitly assigned.

Storage codes not bolded mean the location as inherited those storage codes from the parent location (implicit assignment)

Note: throughout the Assign Storage Codes to Locations page, the locations displayed are based on the user’s “All Sites/My Sites” preference.

The view assignments tab is displayed immediately above. Only those locations that have storage codes explicitly assigned to them are displayed. To remove all storage code assignments from a location, click on the trash icon. To add storage codes to a location, click on the next to the location (top right portion of the page) and then click the Add/Edit Assignments tab, from which the user picks the storage codes to be assigned.
Example of Location and Storage Code Assignment

JAGGAER Labs

Building 1

Floor 1
- Lab A (General)

Floor 2
- Receiving Dock A (Non-Flammable)
- Lab B (Non-Flammable)
  - Shelf 1 (Strong Acid, Non-Flammable)
  - Shelf 3 (Non-Flammable)
  - Bin 2 (Controlled)

Assignment (or lack of) is inherited by lower levels unless different codes are assigned.

Building 2

Floor 2
- Lab 2
  - Hood (Dessicate)
  - Freezer (Cold)

Lower level assignment completely overrides parent assignments.

Assigned

Inherited
## Determining Storage Code Compatibility

Containers are considered to be compatible or incompatible with a location. To be compatible with a location, one of the following must be true:

- The container’s storage code is one of the storage codes assigned to the location.
- The container does not have a storage code.
- The location does not have assigned storage codes.

Using the example of location storage code assignments shown on the previous page, the following table lists containers, their storage codes, and the rooms and sub-locations with which they would be compatible. While storage codes can be associated to sites, buildings, floors, rooms, and sub-locations, containers can only be placed in rooms and sub-locations – thus only rooms and sub-locations are listed in following example.

<table>
<thead>
<tr>
<th>Container with storage code of…</th>
<th>Would be compatible with the following rooms and sub locations:</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>No storage code</td>
<td>All locations</td>
<td></td>
</tr>
<tr>
<td>Strong Acid</td>
<td>JAGGAER Labs &gt; Building 1 &gt; Floor 2 &gt; Lab B &gt; Shelf 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>JAGGAER Labs &gt; Building 2 &gt; Floor 2 &gt; Lab 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Notes</strong>: It is not compatible with Shelf 1 &gt; Bin 2 because Bin 2 has a storage code of &quot;Controlled&quot; explicitly assigned to it and it is not compatible with Lab 2 &gt; Hood or Lab 2 &gt; Freezer because they explicitly have “Desiccate” and “Cold” assigned to them</td>
<td></td>
</tr>
<tr>
<td>Controlled</td>
<td>JAGGAER Labs &gt; Building 1 &gt; Floor 2 &gt; Lab B &gt; Shelf 1 &gt; Bin 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>JAGGAER Labs &gt; Building 2 &gt; Floor 2 &gt; Lab 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Notes</strong>: It is not compatible with Lab 2 &gt; Hood nor Lab 2 &gt; Freezer because those sub locations have &quot;Dessiccate&quot; and &quot;Cold&quot; assigned explicitly to them</td>
<td></td>
</tr>
<tr>
<td>Non-flammable</td>
<td>JAGGAER Labs &gt; Building 1 &gt; Floor 2 &gt; Lab B</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Notes</strong>: It is not compatible with JAGGAER Labs &gt; Building 1 &gt; Floor &gt; Lab B &gt; Freezer because Freezer has &quot;Cold&quot; explicitly assigned to it</td>
<td></td>
</tr>
</tbody>
</table>
Container Transfer

When containers are transferred into a location via the Container Transfer Location operation and Container Transfer Owner/Location operation, ERM will determine if the destination location is compatible. If the location is not compatible, ERM will warn the user, but will still transfer the container into the location. In determining a container’s storage code, the system will use the storage code assigned to the container. If the container does not have a storage code assigned, the system will use the storage code assigned to the container’s material. If neither the container nor the material has a storage code, then the container is compatible with all locations.

Submit Shopping Cart

When a shopping cart is submitted, ERM will check the compatibility of the storage code assigned to each shopping cart item with the storage code assigned to the Deliver-To location. If the Deliver-to location is assigned at the item level, the item level location will be checked. If there is no Deliver-to location assigned at the item level, then the Deliver-to location at the header level will be checked. If any item has a storage code incompatibility, the shopping cart will not be submitted, and an error indicator will be displayed on each item that has an incompatibility. To submit the shopping cart the user may designate a new Deliver-to location that is compatible with the item or remove the item from the shopping cart.

The following details how a storage code is determined for a given shopping cart item:

- For storeroom items: storage code is obtained from the requested container. If the container does not have a storage code explicitly assigned to it, the storage code assigned to the container's material is used.
- For stockroom items: storage code is obtained from the material (if any) associated with the stock master item
- For all other items: the storage code of the material matched to the item is used OR if the item is not matched to a material, the storage code explicitly assigned to the item will be used
Incompatible Storage Report

The Incompatible Storage report lists all containers that are incompatible with a selected location and all of its descendent locations. The report is run from ERM Operations by selecting the EHS Reports > Incompatible Storage Report from the Reports menu.

Configuring Storage Compatibility

By default, ERM does NOT check storage compatibility when containers are transferred or when a shopping cart is submitted. To configure ERM to check storage compatibility, set the `checkStorageCompatibility` property to TRUE. This property is set on the Edit Property Set page in the System Administration module (Server Tab, Server sub Tab, Container Server Component).

Note that the System Administration permission is required to access the System Administration module.

Note that even if ERM is configured to not check storage compatibility, storage codes may still be assigned to locations, and the Incompatible Storage Report may still be used.
Container Rules and Operations

Overview

Container rules operate below the level of permissions, to determine which containers a user is permitted to act on. ERM 9.3 introduces a completely new rules engine approach that is more accessible and usable than in previous versions.

- Simple click-to-build user interface for reviewing and editing container rules
- Container rules are automatically enforced when performing container operations
- Create rules based on the operation and characteristics of the container and/or user – specifying only those combinations that you want to prohibit.
- Build rules applicable to multiple container operations at the same time
- ERM now supports additional rule criteria as compared to the rules engine in earlier releases

Important Notes:

Any container rules created in previous versions of ERM (via an Excel spreadsheet) will no longer be used. After the upgrade, no container rules will exist, and the system administrator must create new rules if they wish to prohibit certain operations.

For new installations, ERM comes pre-configured with a base set of rules. Please contact JAGGAER if you wish to obtain a list of those rules.

ERM permissions determine whether a user may perform a given container operation while rules determine whether the user can perform the operation on specific containers. Example: the user needs the ERM Researcher Container Dispose permission to dispose containers, while rules determine what containers may be disposed.
Rule Conditions

Rules are made up of a series of conditions that specify when a user is prohibited from performing specific container operations. The rules engine in previous versions of ERM determined when a user was permitted to perform container operations. The conditions are applied to specific container operations. For example, conditions can be created that prohibit containers from being disposed, while different conditions prohibit containers from being transferred.

A rule is defined as one or more conditions applied to a container operation. The following table lists the available conditions.

<table>
<thead>
<tr>
<th>Condition</th>
<th>Container Operation Cannot Be Performed If...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container is a Controlled Substance</td>
<td>The container’s material is on an ERM EHS List designated as controlled (Note the sites to which the Lists are assigned are not checked when evaluating this condition)</td>
</tr>
<tr>
<td>Container is in an automated store</td>
<td>Container is in a room designated as an automated store.</td>
</tr>
<tr>
<td>Container is in a room of type</td>
<td>Container is in a room of a designated type. When creating a rule with this condition, the user is prompted to specify the room type i.e. Lab, Storeroom, Receiving Location or Stockroom.</td>
</tr>
<tr>
<td>Container is in a stockroom the user is not assigned to</td>
<td>Container is in a stockroom to which the user is not assigned. User are assigned to stockrooms via the ERM Operations module People tab, using the ‘Assign to Stockrooms’ function.</td>
</tr>
<tr>
<td>Container is on a list</td>
<td>The container’s material is on an ERM EHS List. When creating a rule with this condition, the user is prompted to specify the List. Note that the severity of the List is not considered when evaluating if this condition is true. As long as the container is on the List, regardless of severity, the condition is considered true. (Note the sites to which the Lists are assigned are not checked when evaluating this condition)</td>
</tr>
<tr>
<td>Container is on a list with severity</td>
<td>The container’s material is on any ERM EHS List with a given severity. When creating a rule with this condition, the user is prompted to specify the severity. (Note the sites to which the Lists are assigned are not checked when evaluating this condition)</td>
</tr>
<tr>
<td>Container is Radioactive</td>
<td>The container’s material is on an ERM EHS List designated as radioactive. (Note the sites to which the Lists are assigned are not checked when evaluating this condition)</td>
</tr>
<tr>
<td>Container Status is</td>
<td>Container has a specific status. When creating a rule with this condition, the user is prompted to specify the status.</td>
</tr>
</tbody>
</table>
User does not have access to the container | A user does not have access to a container if any of the following are true:

- Container is in a list controlled room to which the user does not have access.
- Container is reserved for owner and the user is not the owner.
- Container is reserved for a project and the user is not assigned to the project.

Note that a user with the **View All Containers and Rooms** permission has access to all containers regardless if the container is in a list controlled room or if the container is reserved for owner or project.

User does not have permission | User does not have a specific permission. When creating a rule with this condition, the user is prompted to specify the permission.

The permission specified here is different than the permissions that are assigned to each container operation. Each container operation is assigned a permission, which dictates whether the user has access to that operation.

For example the user must have the ‘ERM Researcher Container Dispose’ permission to view the Dispose operation on the Container Operations drop down (detailed in later sections).

The permission in the definition of the container rule should be used to control specific containers for which the user cannot perform an operation. While the user can assign any permission to this condition, two particularly useful permissions used in rules definition are ‘Container Radioactive’ or ‘Container Controlled’. This would prevent users from performing operations on radioactive or controlled containers unless they have the appropriate permission. Custom permissions may also prove useful in this condition.

User is not the container owner | User is not the container owner.

User is not in the container owner’s organization | User is not in the organization to which the container’s owner is associated.

Note that in ERM, organizations can be created in a hierarchy. The following is an example of a hierarchy:

- Biology
- Biology > Dept 1
- Biology > Dept 2
- Biology > Dept 3
When determining the organization to which the user/owner is assigned, ERM will only look at the organization to which they are explicitly assigned, and not at any parent/child organization.

Example: if User1 was assigned to “Biology”, User2 was assigned to “Dept 1”, User3 was assigned to “Dept 2”, and “User4” was assigned to “Biology”, then User1 and User4 would be considered to be in the same organization. User2 and User 3 would not be considered to be in the same organization of any of the other users.

### Evaluating Conditions

A rule is made up of one or more of the above conditions. If all the conditions evaluate to TRUE, then the rule evaluates to TRUE, and the user is **prohibited** from performing the operation. If any of the conditions evaluate to FALSE, then the rule evaluates to FALSE, and the user is **allowed** to perform the operation. The following table gives examples of rules with multiple conditions, and whether the rule evaluates to TRUE or FALSE.

<table>
<thead>
<tr>
<th>Rule</th>
<th>Rule Conditions</th>
<th>Rule Evaluates to TRUE if</th>
</tr>
</thead>
</table>
| 1    | Container is Radioactive  
     | User does not have permission 'Container Radioactive' | The container’s substance is on an ERM EHS List designated as radioactive **AND** The user does not have the permission ‘Container Radioactive’ |
| 2    | Container is in room type lab  
     | User is not the container owner | The container is in a room of type Lab **AND** The user is not the container’s owner |
| 3    | Container is in a stockroom the user is not assigned to | Container is in a stockroom to which the user is not assigned |
More than one rule can be assigned to a given operation. If ANY of the rules to which the operation is assigned evaluates to TRUE, then the user is prohibited from performing the operation.

Example: assume that the ‘Dispose’ operation was assigned to the three rules above. The user would be prohibited from disposing the container if any one of the rules evaluated to TRUE.

ERM does not permit a user to complete an operation that is prohibited by a rule. A user will be informed when performing an operation on a container if a rule has prohibited the operation. For example, when a user initiates an operation from a container search, when the operation is completed, the user will be informed of any containers that could not be processed due to a rules violation. (Please refer to Container Operations section below for details)
## Container Operations

The following are the ERM Container Operations to which rules may be applied.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign to Project</td>
<td></td>
</tr>
<tr>
<td>Change Amount</td>
<td>‘Change Amount’ applies to both the ‘Plus/Minus Amount and ‘Set Current Amount’ operations. It does not apply to the ‘Change Unit’ operation. The ‘Change Unit’ operation does not use the rules engine</td>
</tr>
<tr>
<td>Change Material</td>
<td></td>
</tr>
<tr>
<td>Dispose</td>
<td></td>
</tr>
<tr>
<td>Dispose Empty</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Set In Transit</td>
<td></td>
</tr>
<tr>
<td>Remove Reservation</td>
<td></td>
</tr>
<tr>
<td>Replicate</td>
<td></td>
</tr>
<tr>
<td>Reserve for Owner</td>
<td></td>
</tr>
<tr>
<td>Reserve for Project</td>
<td></td>
</tr>
<tr>
<td>Restore from Dispose</td>
<td></td>
</tr>
<tr>
<td>Transfer</td>
<td>‘Transfer’ applies to the ‘Transfer Location’ operation. It does <strong>not</strong> apply to the ‘Transfer Owner/Location’ operation.</td>
</tr>
<tr>
<td>Transfer to Owner</td>
<td>Transfer to Owner applies to the ‘Transfer Owner/Location’ operation. It does <strong>not</strong> apply to the ‘Transfer Location’ operation.</td>
</tr>
</tbody>
</table>

Note that rules are not applied to the ‘Delete’ or ‘Change Unit’ operations. If the user has the appropriate permissions, they may perform the ‘Delete’ and ‘Change Unit’ operation.
View/Edit Container Operation Rules

Container Operation Rules are viewed and edited via the View/Edit Container Operation Rules page. The user must have the ERM Researcher Container Rules Builder permission. During the system upgrade to ERM 9.3, this permission will be assigned to any role that currently has the System Administration permission. Below is a picture of the View/Edit Container Operations Rules page.

Rules may be exported and imported into another database. When importing rules, any existing rules in the destination database will be deleted.

To Create a rule, enter the Rule Name, add one or more conditions (clicking the plus sign after selecting each condition), select all the operations to which the rule applies and click Save New Rule.

These are the current rules, sorted by the operation to which the rule applies. To delete a rule, click on the trash can.
Container Search

The Lab Inventory and Container Operations pages in ERM 9.2 have been replaced with a new and more powerful Container Search function:

- Choose quick or advanced search
- Return large search results and export the result set
- Sort the result set by multiple columns
- Import or paste lists of container bar codes
- Perform container operations on all or selected containers in the result set
- Background execution of large-scale container transactions frees the user to perform other tasks

The user needs either the ERM Researcher Container Search or ERM Researcher Container Scan permission to access this page. Note the following about these permissions:

- The previous ERM Researcher Lab Inventory permission has been renamed to ERM Researcher Container Search
- The previous ERD Tile Container Operations permission has been renamed to ERM Researcher Container Scan
- On upgrade, the ERM Researcher Container Search permission will be assigned to any role that currently has the Display Container Administrator Tab permission. The Display Container Administrator Tab permission allows the user to see the Container Administration tab in ERM Operations module. Note that the Container Administration tab still exists in ERM Operations, however container operations can now only be performed from ERM Researcher. The Container Administration tab can still be used for doing ad hoc queries on containers.
Container Search Criteria

On the Container Search page, a user can search for containers by any of the following:

- Advanced Criteria – allows the user to specify multiple criteria – such as location, status, and owner.
- Quick Search – allows the user to specify text and uses a search engine
- Import – a list of bar codes may be imported (txt or csv files)
- Paste – a list of bar codes may be pasted
Advanced Criteria

On the Advanced Criteria tab, the user may specify multiple criteria on which to search. The user must have the ERM Researcher Container Search permission to access this tab. Note that advanced search will return a maximum of 20,000 containers.

The following table details each criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains</td>
<td>Text may be entered into this field. ERM will search the following fields to see if any of the fields contain the entered text,</td>
</tr>
<tr>
<td></td>
<td>- Name, formula, structure identifiers, and all aliases of the material in the container</td>
</tr>
<tr>
<td></td>
<td>- Container Label Name</td>
</tr>
<tr>
<td></td>
<td>- Container Catalog Number and Manufacturer Part Number</td>
</tr>
<tr>
<td></td>
<td>- Container Flex Fields</td>
</tr>
</tbody>
</table>

ERM VERSION 9.3.0
Example: if the user enters ‘Formaldehyde’ any container that has a material with a name, formula, or alias that contains ‘Formaldehyde’ will be returned. Note that the ERM will search for text exactly as entered. Example: if the user enters ‘Formaldehyde Solution’, only those materials that have ‘Formaldehyde Solution’ will be returned. The search will not return materials with ‘Solution Formaldehyde’ nor ‘Formaldehyde 150mL Solution’ nor ‘Formaldehyde in Solution’

Location
A location at any level from site down to sub-location may be selected. Any container that has a use location (as opposed to storage location) in the selected location will be returned.

The drop down lists all the user’s alternative delivery locations. By default the location is set to the user’s primary location (as specified on the User Preference page).

The user may pick from the drop down list or select any location in ERM by clicking . Note that the locations that appear when clicking are governed by the user’s ‘All Sites/My Sites’ preference and those rooms for which they have access.

Status

In addition, ‘All’ and ‘Not Disposed’ may be selected. Selecting ‘All’ will return any container regardless of status. Selecting ‘Not Disposed’ will return any container with a status of either ‘Available’ or ‘In Transit’.

Owner
Will return any container owned by the selected owner. Both Active and Inactive users may be selected.

Organization
Will return any container whose owner is in the organization.

When determining the organization to which the owner is assigned, ERM will only look at the organization to which the owner is explicitly assigned, and not at any parent/child organization.
Dates
To search by dates, the user picks a date type, and then a date range.
The date types are as follows: Created, Disposed, Expiration, Last Inventoried, Room Acquired, and Site Acquired.
Once a date type is selected, the user may enter either a start and/or end date.
If a start date is entered, any container that has a date of the selected date type on or after the start date will be returned.
If an end date is entered, any container that has a date of the selected date type on or before the end date will be returned.
If both the start and end dates are entered, any container that has a date of the selected date type on or after the start date AND on or before the end date will be returned.

Project
Will return any container that is assigned to the specified project. The list of projects are all the projects in the system, regardless if the project is active or inactive, and regardless of whether the logged in user is assigned to the project.
All criteria are AND’d together. Example: if the user specifies location of ‘Site 1’ and owner of ‘Joe Researcher’, then any container with that is located in ‘Site 1’ and owned by ‘Joe Researcher’ will be returned.
To be returned in the search results, the containers must meet the entered criteria, and the user must have access to the container.

User Accessibility
A user does not have access to a container if any of the following are true:
- Container is in a list controlled room to which the user does not have access.
- Container is reserved for owner and the user is not the owner.
- Container is reserved for a project and the user is not assigned to the project.

Note that a user with the ‘View All Containers and Rooms’ permission has access to all containers.
Quick Search

On the Advanced Criteria tab the user may enter text on which to search. The user must have the **ERM Researcher Container Search** permission to access this tab. Note that quick search will return a maximum of 20,000 containers.

The ERM search engine is used to search for containers that have the entered text. The containers that are returned are those containers that:

- Have the entered text
- Have a status of ‘Available’
- Are accessible by the user (please read the ‘User Accessibility’ section above for details on what is considered accessible)
- Are in a location as specified by the user’s ‘All Sites / My Sites’ preference.

The search engine searches the following fields for the entered text:

- Container Bar Code
- Container Label Name
- Container Catalog Number and Manufacturer Part Number
- Container Flex Fields
- Supplier
- Manufacturer
- Name, formula, structure identifiers, and all aliases of the material in the container

Unlike the ‘Contains’ field on the ‘Advanced Criteria’ field, the search engine will find any container that matches the entered criteria – regardless of the sequence of the criteria. Example: if the user enters ‘Formaldehyde Solution’, those materials that have ‘Formaldehyde Solution’, ‘Formaldehyde in Solution’, or ‘Solution Formaldehyde’, or ‘Formaldehyde 150mL Solution’ will be returned.

**Import**

The user can import a file of bar codes on which to search. Any container with the specified bar code will be returned – regardless of status, location, or user accessibility. The file should have a single bar code on each line followed by a carriage return. The bar code should **not** be delimited by quotation marks, commas, or any other characters. Regardless of the number of bar codes in the file, a maximum of 20,000 containers will be returned in the search result.

When searching by imported containers, any containers that were previously in the search results will be removed.

The user must have the **ERM Researcher Container Search** permission to access this tab.

**Paste**

The user may paste up to 9,999 bar codes to search. Any containers with the specified bar code will be returned – regardless of status, location, or user accessibility. The bar code should **not** be delimited by quotation marks, commas, or any other characters.

When searching by pasted containers, the pasted containers will be appended to the result set. If the user wishes to clear any existing containers in the result set, the user should click the new search check box.

The user must have the **ERM Researcher Container Search** permission to access this tab.
**Scan**

Users may scan in individual container bar codes. The container with the specified bar code will be returned – regardless of status, location, or user accessibility. The bar code should **not** be delimited by quotation marks, commas, or any other characters.

When scanning in containers, the scanned container will be appended to the result set. If the user wishes to clear any existing containers in the result set, the user should click the new search check box as pictured below.

The user must have the ‘**ERM Researcher Container Scan**’ permission to access this tab.
Container Search Results

The following picture shows the search result page. In order for the picture to fit on the page, the picture has been edited and does not show all the columns returned in the result set. Details on functionality are given on subsequent pages.

Total number of containers returned is displayed at the top in parentheses. In this example 898 containers were returned.

The criteria that initiated the last search will be highlighted in blue and display a magnifying glass. In this case, the Advanced Search criteria was used to perform the search.

Search results may be sorted by multiple columns. In the example below, the results are first sorted by Common Name ascending and Site Acquired Date descending.

To perform an operations on all containers the user selects the ‘All Containers’ check box and selects an operation from the ‘Operations’ drop down.

The user can select all the containers on the current page by clicking this check box. (Up to 200 containers are displayed per page)

The user can select individual containers on which to perform operations by clicking on the individual check boxes.

The user can select up to 2,000 containers individually or page by page.

These buttons allow the user to view more information on the container and perform some operations.

These buttons allow for navigation and manipulation of the search results.
Result Navigation

The following buttons are used in navigating and manipulating the result set.

- Number buttons take you to the specified page. Arrows go to next or previous page.
- Trash can removes all column sorts.
- Up arrow navigates to the top of the current page.
- Down arrow with under bar exports all containers (not just selected containers) to a CSV file.

Note that if more than five pages of containers are returned, the page selector looks like this.
Container Information

Additional information and actions for a container may be accessed by clicking on the downward arrow icon. The following actions/information appears under this icon:

- **View Container**
  - Displays standard container information window.
- **View Container History**
  - View Container History
- **View MSDS**
  - View MSDS
- **View Safety Label**
  - Displays safety label.
- **Print Label**
  - Prints container label.

Container Operations

All Container Operations, with the exception of ‘Submit to Automated Store’ and ‘Retrieve from Automated Store’, have been moved from the ERM Operations module Container Administration tab to ERM Researcher’s new Container Search page. The Container Operations as they now exist in ERM Researcher are described in the following sections. These operations are no longer available via the Container Administration tab.

**Important Note:**

The operations ‘Submit to Automated Store’ and ‘Retrieve from Automated Store’ have been temporarily removed from ERM. They will be added back to ERM in a subsequent release.
Container Operations – Single Container

The following details the operations that can only be performed on a single container. These operations are accessed via the icons on the container search results row. Please read the ‘Operations Permission Section’ for a list of what permissions are required to perform each operation. The operations that can only be performed on a single container are as follows:

- Edit
- Replicate
- Plus/Minus Amount
- Change Unit
- Set Current Amount

**Important Note:**

The functions represented by these operations previously existed in ERM Operations and were accessible via the Container Administration tab. These functions have been removed from ERM Operations. (Note that edit was also accessible in ERM Researcher Lab Inventory search in previous releases)

Single Container Operations and Rules Engine

When performing one of these operations, if the operation is prohibited because of a rule violation, a message will appear displaying the rule that has been violated. Note that multiple rules can pertain to any one operation. The message will only display one rule. Following is an example of the message.

 histórica

The container operation could not be performed per the following rule: Dispose Status Rule.
Description of Single Container Operations

More information for each operation can be found in the on-line help.

**Edit**

Opens the container edit page.

**Replicate**

The container replicate operation works the same as it did in ERM Operations.

**Change Unit**

Change unit allows the user to change the amount unit of the container. Previously this function was found in the ‘Update Container Quantity’ window on ERM Operations Container Administration tab. **Note:** Change Unit is not governed by the rules engine.

**Plus/Minus Amount**

The ability to increment or decrement an amount of a container was previously found in the ‘Update Container Quantity’ window on ERM Operations Container Administration tab. The Plus/Minus window (shown below) allows the user to subtract (minus) amount from a container by selecting the minus button and entering in a value. To add (plus) an amount, the user would select the plus button. By default, when the user enters the window, the minus button is selected. (Note that in ERM Operations Update Container Quantity Window, the user would enter a negative sign to indicate a decrement, e.g. -3. In the new Plus/Minus Amount window the user does not enter a negative sign, but selects the Plus or Minus button).

![Plus/Minus Amount Window](image)

Rules Note: when configuring a rule for this function, the user should select the ‘Change Amount’ on the View/Edit Operation Rules page. ‘Change Amount’ also governs the rules for the ‘Set Current Amount’ operation (describe below).
Set Current Amount

The ability to set a container’s current amount was previously found in the ‘Update Container Quantity’ window on ERM Operations Container Administration tab. The Set Current Amount function allows the user to

- Directly enter the container’s current amount OR
- Capture the gross weight from a balance (or enter manually) to determine the container’s tare weight or current amount. *New* in ERM 9.3, is the ability of the Set Current Amount window to weigh containers measured in volume units.

The Set Current Amount window has two collapsible sections. The Weigh Amount section is used when the user captures gross weight to determine current amount or tare weight. The Enter Amount section is used when the user wants to enter the current amount directly.

**Important Note:** the way in which ERM Researcher communicates with the balance has changed in this release. Please read the infrastructure section for more information.
**Weigh for Current Amount / Weigh for Tare**

The picture to the left shows the Weigh Amount section.

The user can determine the container’s current amount by capturing gross weight and clicking Apply. Note that Weigh for Current Amount will only appear if the container already has a tare weight.

The user can determine the container’s tare weight by capturing gross weight and clicking apply. **Note that Tare Weight is always stored in grams within ERM.**

The user can capture the gross weight from the balance by clicking . The amount and unit will be retrieved from the balance. The user can also enter the gross weight via the keyboard, in which case the unit is always set to ‘g’.

Notes:

The Weigh Amount section will only appear if the user’s ‘Capture Gross Weight’ preference is set to ‘Yes’. This preference is set via the User Preference page, and by default is set to ‘No’.

The only appears if the user has selected a balance on the User Preferences page.
Set Current Amount

The picture to the left shows the Enter Amount section.

The user enters a value for the current amount and clicks 'Apply'. The unit is always the container’s current amount unit and cannot be modified. Note that tare weight is not adjusted.
Weighing a Container Measured In Volume Units

A *new* feature in ERM 9.3 is the ability to weigh a container measured in volume units.

If a container is measured in volume units, when a container’s gross weight is captured from the balance (or entered in via keyboard), ERM will use the material’s specific gravity to determine the container’s current amount or tare weight (depending on the function being performed).

For ERM’s purposes, the “Specific Gravity” value has the same value as the density measured in Kg/L or g/cm\(^3\). For example, the specific gravity value of water is considered to be 1.

If the material does not have a specific gravity, the user must enter a specific gravity before applying the change.

Note that the Specific Gravity entry field is only displayed if the material does not already have a specific gravity.
Container Bulk Operations

Bulk operations are those operations that may be performed on one or more containers at one time. Bulk operations are listed under the ‘Operations’ button on the ‘Container Search’ page. Each operation is associated to a single permission. If the user does not have the appropriate permission for the operation, the operation will not appear under the ‘Operations’ drop down. Please read the ‘Operations Permissions’ section for the permissions required to perform each operation.

Important Note:

The functions represented by these operations previously existed in ERM Operations module and were accessible via the Container Administration tab. These functions have been removed from ERM Operations module.

All operations, except Delete, access the rules engine to determine if the user may perform an operation on specified containers. More details on container operations interaction with rules engine are given in subsequent sections.

All operations except for Transfer Owner/Location, Transfer Location, Assign to Project, and Reserve to Project behave in the same manner as they did on Container Administration tab in the ERM Operations module.

- The Transfer Owner/Location operation is *new* and allows a user to transfer the ownership of a container(s) without transferring the container’s location. Along with transferring ownership, the user may also optionally specify a new use location to which to transfer the container.
- The Transfer Location operation allows the user to only specify a use and/or storage location to which to transfer the container(s), and does not allow the user to transfer ownership.
- The Transfer Owner/Location and Transfer Location will generate storage compatibility warnings if containers are being moved to incompatible locations. The Transfer Owner and Transfer/Owner Location are described in more detail below.
- The Assign to Project/Reserve for Project was a single function on the Container Administration tab. The user would select the project, and then determine if they wish to reserve the container for that project. In ERM Researcher, Assign to Project and Reserve for Project are two distinct operations, each with their own permission and rule association. Note: If the user performs a Assign to Project (as compared to Reserve for Project), any existing reservation for the container (be it owner or project reservation) will be removed (even if the assignment is to a project for which the container is already reserved).

Details on the Transfer operations are given below. Information on all other operations may be found in on-line help.
Transfer Owner/Location

The Transfer Owner/Location window (pictured below) allows the user to transfer the container ownership without changing the container’s location. Optionally the user may also transfer the container to a new user location.

By default, the owner is set to the logged-in user. The user may select a new owner via the Owner widget.

The Use Location defaults to the owner’s primary location. The location drop down displays the alternate delivery locations for the owner. The user may select another location from the drop down widget or select any other location within ERM by clicking on the icon. If the owner is changed, the Use location and locations in the drop down will also change based on the selected owner.

The Default Storage location is set to the storage location associated to the Use Location. The storage location cannot be changed from the default (however the storage location may be explicitly set on the Transfer Location window).

The number of containers to be transferred is displayed here.

By default, the owner is set to the logged-in user. The user may select a new owner via the Owner widget.

If the user wishes to keep the current use location and transfer only the owner, the user would click on the ‘Keep use Location?’ check box.

The Transfer button transfers the containers, while the Back to Search button returns to the container search results page without performing a transfer.
Transfer Location

The Transfer Location window (pictured below) allows the user to transfer the container to a use location (and optionally select a storage location) without transferring container ownership. The Transfer Location window is pictured below.

The number of containers to be transferred is displayed here.

The Use Location defaults to the logged in user’s primary location. The location drop down displays the alternate delivery locations for the logged in user. The user may select another location from the drop down widget or select any other location within ERM by clicking the .

The Default Storage location is set to the storage location associated to the selected Use Location.

The user may select a storage location different from the default storage location to which to transfer the container. When the user performs the transfer, the container’s storage location will be set to the default value unless the user has explicitly picked a different storage location.

The Transfer button transfers the containers, while the Back to Search button returns to the container search results page without performing a transfer.
Transfer Location and Storage Compatibility

When transferring the use location of a container(s) (via either Transfer Owner/Location of Transfer Location windows), ERM will check if the container’s storage code is compatible with the destination location’s storage code. If the storage codes are incompatible, the container will still be transferred, however the user will receive a warning message noting the incompatibility. Messages resulting from container operations are described in more detail below. Storage compatibility is detailed elsewhere in this document.

Note: storage compatibility will only be checked if ERM is configured to perform the check. Please read elsewhere in this document for details on configuring the check.
Performing Bulk Container Operations

Foreground and Background

When performing a bulk container operation, the operation will be performed either in the foreground or background.

- **Foreground** – when performing an operation in the foreground, the user remains on the container search page and may not navigate to any other page.

- **Background** – when performing an operation in the background, the user may navigate to other pages, perform other activities within ERM Researcher (such as source searches, submission of shopping cart), and log out.

ERM will determine when an operation is to be run in the foreground or background. Container operations will be automatically performed in the foreground when one to five hundred containers have been selected. Operations automatically will be performed in the background when more than five hundred containers have been selected.

When performing operations in the background, every time the user accesses the Container Search page, the user will see the ‘Operation Running [n]/[m]’ message (pictured below) giving the status of the operation. The message gives the number of containers that have already been processed [n] and the total number of containers selected (m). In the example below, ERM already processed 1,000 containers out of 5,000 containers selected.

While a background operation is running

- The user is prohibited from performing another search or another operation on the current result set.

- If the user logs out, and then logs back in, when they access the Container Search page, they will see the container search results for the last search they performed as well as the ‘Operation Running’ message.
Once the background process is completed, when the user accesses the Container Search page, the user will see a summary message (example shown below), stating the operation performed, total number of containers selected, and total number of containers successfully processed. In the example below, the user performed the ‘Transfer Owner’ operation on 5,000 containers, and 5,000 containers were successfully processed.

The user can export the result of the operation by clicking on the button.

The user will also receive a notification via ERM’s standard notification process summarizing the operation. More information on the summary message, exporting results of the operation, and operation notifications are detailed below.

**Operation Messages**

When either a foreground or background process is completed the following occurs:

- A summary message is displayed at the top of the container search page.
- An export button is displayed next to the summary message allowing the user to export details of the operation.
- A summary notification is sent to the user via ERM’s standard notification process.
An example of the container operation summary message is displayed below. The message gives summary statistics for the operation performed.

- **# of containers selected for the operation**
- **# containers not processed because of rule violations. This will only appear if there were rule violations**
- **# containers not processed because of system errors. Please contact JAGGAER if this appears.**
- **# of containers successfully processed**
- **# Containers that were transferred into locations that were incompatible based on storage codes. This number will only appear for Transfer Owner/Location and Transfer Location operations, and only if containers were transferred into incompatible locations. Note that even though the location may be incompatible, the container will still be transferred**
Aside from the summary message, the user will receive a notification when the operation is completed. Below is an example of an in-line notification.

<table>
<thead>
<tr>
<th>Processed / Total</th>
<th>Dec 4, 2017 10:36:24 AM</th>
<th>Container Operation Complete</th>
<th>Transfer Owner/Location - 39/44</th>
</tr>
</thead>
<tbody>
<tr>
<td>42 / 44</td>
<td></td>
<td>Container Operation Complete</td>
<td>Transfer Owner/Location - 39/44</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Success: 39</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>System Error: 0</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rules Violations: 3</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Incompatible Storage: 16</td>
<td></td>
</tr>
</tbody>
</table>

This notification is a standard ERM notification, and may be received as an in-line configuration. To configure whether to receive the notification the user would configure the ‘Container Operation Complete’ notification on the ‘Change Notification Preferences’ page. (There is a known issue that the notification will never be sent as an e-mail.)
After the operation has completed, the user can click on ![Download](download-icon) to export details of the operation. The file exported is a csv file, whose name is the name of the operation just performed. Following is an example of the export file:

<table>
<thead>
<tr>
<th>Bar Code</th>
<th>Container’s bar code</th>
<th>Successful</th>
<th>Incompatible Storage Code</th>
<th>Rule Violation</th>
<th>System Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>1675</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1669</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EHBBC000061</td>
<td></td>
<td>X</td>
<td></td>
<td>Transfer Not Owner</td>
<td></td>
</tr>
<tr>
<td>1679</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1672</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1667</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6977</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1666</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EHBBC000888</td>
<td></td>
<td>X</td>
<td></td>
<td>Transfer Not Owner</td>
<td></td>
</tr>
<tr>
<td>6976</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The columns are as follows:

- **Bar Code**: Container’s bar code
- **Successful**: A ‘X’ will appear in this column if the operation was successful for the container
- **Incompatible Storage Code**: A ‘X’ will appear in this column if the container’s storage code was incompatible with the destination location.
  
  This column will always be displayed, but is only applicable for the Transfer Owner/Location and Transfer Location operations.

  Storage compatibility will only be checked if ERM is configured to check compatibility.

  Note that a container will still be transferred even if there is a storage compatibility issue.
- **Rule Violation**: Name of rule that was violated if the operation violated a rule.
- **System Error**: A ‘X’ will appear in this column if there was a system error when performing the operation.
## Operations Permission

The table below lists the permissions needed to perform each operation. Unless otherwise detailed in the Note column, all these permissions previously existed with names starting with 'Container Administration Menu Item...' and have been renamed to start with 'ERM Researcher Container...'. Example: 'Container Administration Menu Item Dispose' has been renamed to 'ERM Researcher Container Dispose'.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERM Researcher Container Assign to Project</td>
<td>Note 2</td>
</tr>
<tr>
<td>ERM Researcher Container Change Substance</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Delete</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Dispose</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Edit</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Put In Transit</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Qty Update Plus/Minus Amount</td>
<td>Note 1</td>
</tr>
<tr>
<td>ERM Researcher Container Qty Update Set Current or Tare Amount</td>
<td>Note 1</td>
</tr>
<tr>
<td>ERM Researcher Container Qty Update Set Unit</td>
<td>Note 1</td>
</tr>
<tr>
<td>ERM Researcher Container Remove Reservation</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Replicate</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Reserve for Owner</td>
<td></td>
</tr>
<tr>
<td>ERM Researcher Container Reserve for Project</td>
<td>Note 2</td>
</tr>
<tr>
<td>ERM Researcher Container Restore from Dispose</td>
<td></td>
</tr>
</tbody>
</table>
Note 1

In previous releases, there was one permission ‘Container Administration Menu Item Qty Update’ that allowed the user to perform the following:

- Increment/decrement a container’s current amount
- Use gross weight of the container to determine either the container’s current amount or tare weight
- Change the unit of a container

Each of the above actions now have an explicit permission assigned to them – each beginning with ‘ERM Researcher Container Qty Update...’

During the upgrade, any user with the previous Container Administration Menu Item Qty Update permission will be assigned the new permissions.

Note 2

In previous releases there was one permission Container Administration Menu Item Reserve for Project that allowed a user to assign OR reserve a container to a project. In this release there are two separate permissions

- **ERM Researcher Container Assign to Project** – opens the Assign to Project window and allows the user to assign, but not reserve, a container to a project
- **ERM Researcher Container Reserve for Project** – opens the Reserve to Project window and allows the user to reserve a container for a project

During the upgrade, any user with the old Container Administration Menu Item Reserve for Project permission will be assigned the ERM Researcher Container Assign to Project and the ERM Researcher Container Reserve for Project permissions.
Receiving

Previously a top-level tab in ERM Operations, the process to fulfill requests for chemicals, lab supplies and Stockroom Replenishment items has been fully migrated to ERM Researcher – a process which began with the 9.2 release. As of the 9.3 release, all Receiving request processing functionality has been removed from the ERM Operations module.

Receiving Search

The initial Receiving search window is generally unchanged from ERM 9.2. One key change is Stockroom Replenishment requests are now returned in the search results for processing within Researcher. Stockroom Transfer request processing, previously handled from the Receiving window in Operations, has been integrated into the Stockroom module (detailed later).

Receiving Work List

The Receiving Work List page allows the user to group together items that are selected on the Receiving Search page to be received together (for example, in the same shipping container or from the same purchase order). The Receiving Work List page has been enhanced to incorporate functionality previously available in Operations Receiving and to introduce new features.

Receive Without Creating Containers

A user can now receive those request items that will not create containers directly from the Work List, eliminating the requirement to go to the Process window.

For request items that do not require the creation of chemical containers, a user can select the Receiving Truck Icon (previously used to access the Receiving Process window). The request item will be received immediately without opening the receive window.

All request items with the Receiving Truck icon will also have the ‘Open Receive Page’ icon. Clicking this icon will open the current receiving window. The ‘Open Receive Page’ icon is the only option for request items which will require the creation of chemical containers.
Additional Work List Options

The Receiving Work List now has a ‘More Actions’ menu available for each request item. Accessed by selecting the ‘More Actions’ icon, the user can view:

- Safety Data Sheet information for an item
- any internal notes on the request
- attachments that have been placed on the request item

View Received Containers

For items which have been partially or fully received, the user can now view information related to the created containers. The ‘Received Containers’ window (shown below) shows the bar code for the received container(s) as well as the original and current amount in the container(s). The user can also print container bar code labels for all of the created containers from this window.

Manually Enter a Purchase Order for an ERM Request

For ERM requests that require a purchase order be generated prior to receiving, there will be times when the purchase order and line number will need to be manually entered (example: purchase order gets created in the Purchasing System but fails to be passed through to ERM).
An ERM manager with the **ERM Operations Create Purchase Order** permission will be able to manually enter a Purchase Order and line number for an ERM Request on the Receiving Work List window. When a PO number is required prior to processing an item, the request will have a status of ‘External Approval Required’ and the row will display the ‘Assign Purchase Order’ icon 🔄.

Selecting the ‘Assign Purchase Order’ icon will open the ‘Assign PO Number’ window, shown below.
Receiving Page

The Receiving page (pictured below) is where the item is actually received. When the item is received, the quantity received and status are updated for the line item and, if the item is tracked as containers, containers are created and labels are printed.

For ERM 9.3, several enhancements have been introduced including functionality not previously available in ERM Operations Receiving. These enhancements include:

- the ability to automatically set the ‘Suppress Container’ flag on a material (*new* for ERM Receiving)
- *manually* provide container weight during receipt
- lab balance integration to weigh containers
- the ability to weigh containers of liquids (*new* for ERM Receiving)
- on-screen alert when the Quantity to Receive exceeds the Quantity Outstanding
Request Information Area can now be closed if a technician opens it to view request details. Note that if any field value is modified, the Request Information Area will remain open.

Quantity to Receive allows the user to indicate how many items are to be received.

Quantity Outstanding after Receipt allows the user to manually override the amount of items awaiting receipt for a request item. Ex: One 4L container was ordered; however, the supplier is providing four 1L containers. If only one bottle has been received, setting the 'Quantity Outstanding...' to 3 will keep the request open until the remaining bottles are received. Additionally, the request will be updated to show that 3 1L bottles are still on order.

Create Containers – for items for which containers will be created, this section allows the user to enter container information. If no containers should be created for the item (in the case of misclassification of the item), the user can uncheck Create Containers, in which case containers will not be created.
Create Containers Checkbox

The Create Containers section is where the user specifies information about the containers to be created upon receipt of the item. This section existed in the initial iteration of ERM Researcher Receiving; however, the rules governing when the ‘Create Containers’ option can be modified has been significantly enhanced as detailed below.

Determining if Containers Should be Created

Authorized users can indicate that receipt of a request item should, or should not, create containers, in situations when the supplier has not assigned the appropriate category code to the associated catalog item (example: lab glassware incorrectly categorized as “fine chemicals”).

The “Create Containers” checkbox and section will not be visible if the item has been associated to a commodity code that indicates the item is a lab supply (such as glassware). This commodity code categorization only applies to the JAGGAER hosted catalog source; items from all other external sources are considered chemicals. (Please contact JAGGAER for more information on the categorization of items). Upon receipt of such an item, no containers will be created.

If the request item is linked to an ERM material, the check box will appear; however, it can be unchecked. Materials have an attribute that indicates if containers should, by default, be created on the receipt of that request.

- In ERM Researcher the attribute is set on the Materials Edit page and is called “Create Containers on Receive”. It should be check to indicate containers should be created on receipt of the item.

- In ERM Operations, the attribute is set on the Materials Edit page but is called “Suppress Container Creation”. It should be unchecked to indicate containers should be created on receipt of the item.

If the “Create Containers on Receive” attribute for the associated material is set to “Yes”, the check box will be checked, the Create Container section will be displayed and containers will be created when the item is received. If the user determines that containers should not be created for the item, they can uncheck the check box which will collapse the Create Containers section and in which case containers will not be created on the receipt of the item.
With the 9.3 release, if Create Containers is initially Y and the user sets it to N, then when the user clicks ‘Receive’ the following will occur:

- Check to see if there are any containers, in any status, on any site, for this material
  - If no containers exist, then when the receipt is processed, ERM will **automatically** set the material to indicate containers should **not** be created. The user **will not** be notified that this is going to occur.
  - If any containers exist, the user will be alerted that containers of this material already exist and given the option to not proceed.

- When the item is received, the associated material will also be updated so as to indicate that containers will not be created for this item (because it is of a material that does not create containers).
  - This update reflects the change to the material and ensures that, for partial receipts, the remaining portion of this item is also received without creating containers.

If the initial state for this request item is Create Containers = Y, then the user will not be permitted to change it to N if either of the following conditions exist:

- If containers have previously been received for this request item
- The request item is matched to a list with severity of Warning, Restricted I, or Restricted II

Note that for clients who want to prevent this action for items based on control zone or expiration date, they should set the processing of the associated lists to "Warning", “Restricted II”, or “Restricted I”.

If the “Create Containers on Receive” attribute for the associated material is set to **No** then the **Create Containers** will be **unchecked**, the create container section will **not** be displayed and containers will be **not** be created when the item is received. If the user determines that containers **should** be created, they may click on “Create Containers” which will display the “Create Containers Section”.

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With the 9.3 release, if Create Containers is initially N and the user sets it to Y, then when the user clicks ‘Receive’ the following will occur:

- Display the message "Other items may have been received for this material without creating containers. If this material should always create containers in the future, please edit its profile accordingly."
- Do not automatically change the material to "Create Containers = Y"
Weighing Containers

With the 9.3 release, ERM Researcher Receiving allows a user to determine the tare weight of the container by capturing the container’s gross weight. A container’s gross weight can be captured either via a lab balance or manual input. Additionally, users can now capture the gross weight of a container with a current amount measured in volume – a feature not previously available in ERM Operations Receiving.

The Bar Codes section of the Receiving page (pictured below) has new fields to facilitate the capturing of the gross weight.

During the Receiving process, a technician can optionally capture the gross weight of a container in two ways:

- Captured from a lab balance OR
- Entered manually from the keyboard
When using the balance, the containers gross weight and unit will be retrieved from the balance. When gross weight is manually entered, the unit will always be ‘g’.

When the container has a volume unit, to calculate the container’s tare weight, ERM will convert the container’s current amount to a mass equivalent by using the material’s specific gravity. Because Specific Gravity can vary across common research materials by a factor of $10^3$ or more, ERM will not use an estimated or default value when the material does not have a specific gravity. If the material does not have a Specific Gravity value, the user must provide one in the ‘Specific Gravity’ entry field. The material will be updated with provided Specific Gravity value.

Lab Balance Scale Button

The ‘Gross Weight’ field is available on the Receiving window when the Receiving technician has selected ‘Capture Gross Weight’ on their User Preferences page. The Lab Balance Scale button is available on the Receiving window when the Receiving technician has selected a scale on their User Preferences page.

Important Note: the way in which ERM Researcher communicates with the balance has changed in this release. Please read the infrastructure section for more information.
Structure Search Changes in ERM 9.3

ERM’s Structure search capabilities have been enhanced to support similarity and tautomer search options with chemical structure cartridges and services that offer these search options. As with other ERM structure search options, these search options are based on a criteria structure, which may be drawn, pasted, or imported.

“Tautomer” search is a single selection from the search type drop-down. In concept, a Tautomer search is similar to an “Equal” search, with the difference that in addition to the criteria structure, it returns other structures which are isomers of the criteria structure.

“Similarity” search parameters include the type of similarity search (“Normal”, “Super” or “Sub”) and the similarity threshold percent. The similarity algorithm used will vary depending on the cheminformatics technology used by each structure database.

- Similarity search results will return a percent similarity value, which is displayed on each structure in the result set (the illustrated structure has a 90.48% similarity percent rating relative to the criteria structure)
- The search result will include structures whose percent similarity value is greater than or equal to the entered similarity threshold percent
- Structures in the result set will be sorted by similarity percent, descending, and then by molecular weight, ascending.
Stockroom Transfers

Previously, a Stockroom Transfer request was submitted in the Stockroom application, fulfilled in the Stockroom application, but received (when necessary) in ERM Operations on the Receiving tab. With the ERM 9.3 release, all aspects of the transfer process will be contained within the Stockroom application.

Overview of Transfer

In ERM Stockroom, when a user transfers inventory from one stockroom to another, two separate requests are created – one of type “Stockroom” and one of type “Stockroom Transfer”. There are three steps involved in submitting and fulfilling a request to transfer inventory.

1. Specify/Submit the stockroom transfer
2. Fulfill the stockroom request
3. Receive the stock at destination stockroom

Depending on the transfer use case, one or more of above steps may be implicit (meaning, it will happen without the user taking any action); for example:

- When the source stockroom does not accept requests, step 2 will be implicit (i.e., the request will be considered "fulfilled" as soon as it is submitted)
- When the destination stockroom is "Auto Check-In", step 3 will be implicit (i.e., the request will be considered "received" as soon as it is fulfilled)

Transfer Process

The process for fulfilling a Stockroom Transfer Request has not changed. The stockroom technician views the pending requests for a stockroom on the Pending Requests page (accessed via the Pending Requests panel on the Stockroom Home Page or via the menu). After “picking” the items to fulfill the transfer request, the corresponding Stockroom Transfer request will either be automatically processed (destination stockroom is an “Auto Check-In” stockroom) or the status of the Stockroom Transfer request will be updated from Hold to New.
In the Stockroom module, the Incoming Transfers panel is a new section available for stockroom technicians to receive stockroom transfer requests that are not automatically processed. The Incoming Transfer panel only appears for users with the **Stockroom Module Receive Transfer Requests** permission.

The Incoming Transfers panel (pictured below) lists those stockrooms with transfer requests which are ready for receipt.

**Incoming Transfers Window**

The Incoming Transfers window allows stockroom technicians to receive transfer requests when the destination is NOT “Auto Check-In” and the request has been processed by the source stockroom.

All Transfer items have a status of “Hold” until the Stockroom request is fulfilled either automatically (when the source stockroom does not accept requests) or manually by the stockroom technician. Once the Stockroom request is fulfilled, the status of the items on the Transfer request is set to “New”. Transfer items cannot be received until they have a status of “New”.
The Incoming Transfers window (pictured below), displays all transfer requests for a selected stockroom which have a status of ‘New’. From the window, users can perform various functions as described below:

<table>
<thead>
<tr>
<th>Action</th>
<th>Qty. Outstanding</th>
<th>Qty. Ordered</th>
<th>Product Bar Code</th>
<th>Name</th>
<th>Source Stockroom</th>
<th>Request #</th>
<th>Item #</th>
<th>Inventory Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image" /></td>
<td>6</td>
<td>6</td>
<td>CM00891382</td>
<td>024008 STERILE POUCH; CHEX-ALL; PROPER MANUFACTURING; INSTANT-SEAL; 3 X 8 IN.; 500/CS</td>
<td>AFC Stockroom 1</td>
<td>975</td>
<td>1</td>
<td>Count</td>
<td>New</td>
</tr>
<tr>
<td><img src="image2.png" alt="Image" /></td>
<td>5</td>
<td>5</td>
<td>HPLC8511.</td>
<td>0.080 IN. OD X 0.058 IN. ID X 25 FT (2 M M OD X 1.5 MM ID X 7.6 M), PTFE; 1/E</td>
<td>AFC Stockroom 1</td>
<td>979</td>
<td>1</td>
<td>Visual</td>
<td>New</td>
</tr>
<tr>
<td><img src="image3.png" alt="Image" /></td>
<td>5</td>
<td>5</td>
<td>CAD0165</td>
<td>1,4-DIOXANE (CERTIFIED ACS). FISHER CHEMICAL; P-DIOXANE; 500ML; AMBER GLASS; F.W. 88.11; C4H8O2; OCH2CH2OCH2CH2; CAS: (123-91-1); 6/CS</td>
<td>AFC Stockroom 1</td>
<td>981</td>
<td>1</td>
<td>ERM Containers</td>
<td>New</td>
</tr>
</tbody>
</table>

**Description**

- **Fully processes the transfer request with a single click.** Stockroom technician would use this icon when all of the requested items are available for receipt and no modifications need to be entered.

- **Opens a window which allows the stockroom technician to individually select the containers being received (ERM Container stock) or to indicate how many of a requested item is being received (Count and Visual stock).**

- **Closes the transfer request.** For the receiving stockroom, this will remove the outstanding quantity from the on order quantity for the inventory item. For ERM Container stock, the requested containers will still be noted as “In Transit” and will need to be checked in to the source stockroom for these containers to be counted as available stock.

- **The green checkmark is displayed after an item has been fully received.** It does not display for partial receipts or when an item has been closed.
The icon will open one of two windows depending if the item is container stock OR the item is count/visual stock. For count/visual stock a window like the following will be displayed:

- Items cannot be over-received. The "Quantity to Receive" value must be less than or equal to the "Qty Outstanding".
- For items of type "Count" and "ERM Containers", when an item is received, the Primary Stocking Location’s On Hand amount will be incremented by the "Quantity to Receive".
When a transfer item is received for an item of type “ERM Containers” the user must specify which ERM containers are being received – as specified in the following screen:

The bar codes displayed in the dialog box will be all the containers that have not yet been received for the item. The number of containers checked by the user must match the quantity received amount. When the item is received the containers are moved to the destination stockroom. If the destination stockroom had a primary stocking location specified when the transfer request was submitted, then containers will be moved to the delivery’s stockroom primary location.

When a transfer item is canceled or closed, the outstanding quantity and quantity received is set to 0. For items of type “ERM Containers”, when a transfer item is canceled or closed, the containers that have yet to be received remain in the source stockroom and the status of the containers remain “In Transit”.

## General Enhancements and Modifications

This section details enhancements and modifications in ERM Researcher that were not listed in other sections.

<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>FUNCTION SUMMARY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container</td>
<td>Safety Label</td>
<td>In this release the ability to view the safety label has been added to the To Do List.</td>
</tr>
<tr>
<td>Flex Field Configuration</td>
<td>System Administration Module</td>
<td>On Receiving, a container’s flex fields can inherit the values of either request header or item flex fields. In previous releases, the configuration of what flex fields the container flex fields inherit had to be done directly in the database via SQL statements. In this release this configuration can be done via the Container Flex Fields page in the System Administration module.</td>
</tr>
<tr>
<td>Help</td>
<td>On Line Help</td>
<td>On line help is now available. Help is accessible by clicking found under the <a href="#">Help</a>.</td>
</tr>
<tr>
<td>Location Selector</td>
<td></td>
<td>Previously within ERM Researcher, the user could only select locations from the list of alternate delivery locations as well as their primary use location. In various places throughout ERM, when picking a single location, in addition to their primary use location and lists of alternate delivery locations, the user can now pick any location within ERM. Following shows the location picker that may be found in various places in ERM researcher: The picker defaults to user’s primary use location. The user can click on the drop down arrow to see the list of alternate delivery locations. In this release the user can pick on the <a href="#">Location Selector</a> to open up a new location window which allows the user to pick any location within ERM.</td>
</tr>
</tbody>
</table>

Eds Site 1>Bldg 1>Floor 1>Lab 101
## New location window

Below is a picture of the new location window from which the user can pick any location. The locations displayed are governed by the “All Sites/My Sites” preference. Rooms to which the user does not have access (List Controlled rooms) will not be displayed unless they have the View All Rooms Containers permission.

![New location window screenshot](image)

### FUNCTION

<p>| Open Approvals | View MSDS | A MSDS may now be viewed from the Open Approvals page.  |</p>
<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>FUNCTION SUMMARY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Reports  | Container Expiration Alert Report | In previous releases, the database administrator (deployed) of JAGGAER Support (hosted) could configure a database job to send an e-mail to users notifying them that containers are about to expire. This database job could be scheduled to be run at certain intervals. The ‘Container Expiration Alert Report’ is a new mechanism by which an ERM user can schedule the aforementioned database job. The ‘Report’ is not actually a job but is used as a way to schedule the job. It can be scheduled using the current report scheduling mechanism found in ERM Operations. The body of the actual report only contains one line – an example of which is given below:

    Emails have been sent to users whose primary rooms have containers that will expire in 31 days.

Please read the ERM Reports document for more information. |
<p>| Reports  | Containers Owned by Inactive Users | The ‘Containers Owned by Inactive Users’ is a new report that shows all containers with a status of &quot;Available&quot; or &quot;In Transit&quot; whose owner is inactive. Details regarding the report can be found in the ERM Reports document. |
| Reports  | Stockroom Inventory Report | The ‘Stockroom Inventory Report’ is a new report that details the parameters and inventory calculations for inventory items in a selected stockroom. |
| Request Item | History | Request item history has been enhanced to track more information. |
| Request Item | Information | The request item information that is available in various places throughout ERM (such as &quot;My Requests&quot;) has been enhanced to include the original package size ordered. In ERM 9.2, on the item information page, only the package size of what was actually received was displayed. In this release, both the package size of what was ordered as well as what was actually received will be displayed. |
| Place Order | Material Creation | If a material is automatically created during the request creation process, the material will be assigned the molecular weight from the catalog item (if molecular weight exists on the item). |</p>
<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>FUNCTION SUMMARY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping Cart</td>
<td>Check Out Page</td>
<td>Previously within ERM Researcher, each item on a shopping cart had to have the same Deliver-to location and Cost Center. With this release, users have the option of specifying both the delivery location and/or the cost center for any of the individual line items. The Deliver-to and Cost Center will still be provided at the header level, but a user can then <strong>override</strong> that selection with a line item selection. Each line item in the Checkout Cart is now editable, indicated by a pencil icon. Selecting the Edit/Pencil icon will open selection windows for Deliver-to and Cost Center on the line item. For channels that do not use cost center, only the Deliver-to field will be displayed. After choosing an alternate Deliver-to location and/or Cost Center, the user selects ‘Save’. The line item overrides are displayed with the other line item information.</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>Report on Check Out</td>
<td>Previously when a shopping cart was submitted, a report was generated and displayed to the user on a separate tab in the browser. The report will no longer be displayed on a separate tab but sent to the user via a notification, using the ERM’s standard notification function (in-line or e-mail). The report will be an attachment to the notification (in-line or e-mail). Pictured below is the notification on the notification page.</td>
</tr>
<tr>
<td>FUNCTION SUMMARY</td>
<td>DESCRIPTION</td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The user may click the icon to view the report. The user can configure to receive/not receive this notification via the “Change Notifications Preference” page and selecting/deselecting the “Shopping Cart Submit” notification.</td>
<td></td>
</tr>
<tr>
<td><strong>Web Services</strong></td>
<td>ERM provides an API of web services to allow external software to perform ERM functions. Previously this API was only provided via a SOAP interface but now has been re-implemented using a subset of the RESTful service pattern. Note that the SOAP services still exist for some operations but are considered deprecated and will be phased out in future releases. Please Read the <a href="#">ERM Web Services</a> document for additional details.</td>
<td></td>
</tr>
</tbody>
</table>
ERM Operations

The following operations have been removed from the ERM Operations module:

<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>NOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar Code Administration</td>
<td>The bar code administration tab has been removed. The Bar Code Automation service is no longer supported.</td>
</tr>
<tr>
<td>Container Administration / Container Operations</td>
<td>All container operations have been moved from the Container Administration tab to ERM Researcher. Note that Automated Store Submit and Retrieval functions have been removed from all of ERM in this release. They will be returned back to ERM in a future release.</td>
</tr>
<tr>
<td>Container Operations / Create Container</td>
<td>The ability to obtain weights from a balance when creating a container in ERM Operations is no longer available.</td>
</tr>
<tr>
<td>Data Loader</td>
<td>When loading containers, a container's tare weight can be specified. In 9.3, as in previous releases, the unit of the tare weight cannot be specified, only the amount value may be specified. Previous to ERM 9.3, tare weights for all containers were saved in the unit of the container's current amount. In 9.3, tare weight will always be stored as grams. During the upgrade process, existing tare weights will be converted to grams.</td>
</tr>
<tr>
<td>Delivery Request</td>
<td>Delivery Request functionality has been moved to ERM Researcher.</td>
</tr>
<tr>
<td>Receiving</td>
<td>Receiving functionality has been moved to ERM Researcher.</td>
</tr>
</tbody>
</table>
Infrastructure and Administration

The following changes have been made with regard to the infrastructure and administration.

<table>
<thead>
<tr>
<th>COMPONENT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance</td>
<td>With this release, ERM Researcher may access a balance to weigh containers in either the receive process or the set current amount container operation. The way ERM Researcher communicates with the balance is different from how ERM Operations communicated with the balance. ERM Operations accessed the balance via a dll that had to be installed on the user’s machine. ERM Researcher now accesses the balance via a Tomcat service installed on the machine on which the balance is connected. The Tomcat service will require SSL to be enabled via a self-signed certificate or certificate purchased from a commercial signing authority. Previously the communication parameters for the balance (such as baud rate, stop bits, etc.) were configured in the System Administration module, via the ‘Scales’ selection on the Physical Codes page. These parameters are now configured via the bootstrap-erd-scales.properties file on the machine that is connected to the scale. In the ERM System Administration module, the only thing that is configured for the scale is the scale’s name and the URL of the machine on which the tomcat service is running. Please read the ERM Balance Integration, Installation, and Configuration Guide for more information.</td>
</tr>
<tr>
<td>Logging</td>
<td>Logging has been enhanced for functions that occur in the database. This is useful for deployed customers that can access the database. Please contact JAGGAER for more information.</td>
</tr>
</tbody>
</table>
Fixed Issues

These issues were detected in previous releases of ERM and have been fixed in ERM 9.3.0. They do not include issues fixed in previous patch releases nor do they include internally detected issues unless they have been deemed to be of operational importance. The Summary of Defect column describes the defect as it occurred in previous releases. Unless explicitly noted, fixes pertain to ERM Researcher.

<table>
<thead>
<tr>
<th>MODULE/FUNCTION</th>
<th>OPERATION</th>
<th>SUMMARY OF DEFECT</th>
<th>INTERNAL DEFECT #</th>
<th>DETECTED IN VERSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container and Substance</td>
<td>Registration</td>
<td>When creating substances or containers, errors would occur when 1) The total length of a container’s label name, bar code, catalog number, manufacturer part number, supplier name, manufacturer name, and flex fields PLUS 2) The total length of all names and identifiers of the material in the container Exceeded four thousand characters This has been fixed. Note: this fix affects searching by material name and/or identifiers. When performing a material or container search by material name and/or identifier, ERM internally concatenates a material’s name and all identifiers into one string. When ERM performs a search, ERM will only search the first three thousand characters of the concatenated string.</td>
<td>ERM-15784</td>
<td>9.2</td>
</tr>
<tr>
<td>Container Edit</td>
<td>Labels</td>
<td>When printing labels from the Container edit page, no printers appear in the drop down unless the user had the &quot;Manage Sublocations&quot; permission. This permission should be required to print labels.</td>
<td>ERM-15820, ERM-15819</td>
<td>9.2.1</td>
</tr>
<tr>
<td>MODULE/FUNCTION</td>
<td>OPERATION</td>
<td>SUMMARY OF DEFECT</td>
<td>INTERNAL DEFECT #</td>
<td>DETECTED IN VERSION</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Container Operations</td>
<td>History</td>
<td>In container history window, sub-location was not shown in the <strong>New Value</strong> field for transfer. (Note there is a known issue in which the sub-location is not shown in the Old Value field – see ERM-15789) &lt;br&gt; In the container history window, transfer to storage location transactions were not displayed.</td>
<td>ERM-15537</td>
<td>9.2.0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>ERM-15979</td>
<td></td>
</tr>
<tr>
<td>Order</td>
<td>Request Attachments</td>
<td>The size of files that may be attached to shopping cart items has been increased from 292KB to 1.5 MB. A message will be displayed if the user attempts to attach a larger file.</td>
<td>ERM-15562</td>
<td>9.1.1</td>
</tr>
<tr>
<td>Reports</td>
<td>Stockroom Cost Center Activity report</td>
<td>The report is showing stockroom checkouts but checkouts for the same day, same material, same cost center only show once.</td>
<td>ERM-15692</td>
<td>8.1.2</td>
</tr>
<tr>
<td>Request</td>
<td>Type-In Items</td>
<td>When editing a Type In item on a held cart, there was no “Notify” tab.</td>
<td>ERM-15465</td>
<td>9.2.0</td>
</tr>
<tr>
<td>Request Searching</td>
<td>Request Searching</td>
<td>When a user cancelled a Delivery Request (Storeroom Request), the requested container was still visible on the My Requests page via the ‘i’.</td>
<td>ERM-15606</td>
<td>9.2.0</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>Header Flex Fields</td>
<td>The header flex fields as displayed on the shopping cart are not alphabetized.</td>
<td>ERM-15883</td>
<td></td>
</tr>
<tr>
<td>Stockroom</td>
<td>Container Registration</td>
<td>When a container is created for a stock master item via the stockroom module (create containers), the expiration date of the container is not set, even if the material associated to the stock master item is on an EHS List with an expiration interval.</td>
<td>ERM-14301</td>
<td>8.1.1</td>
</tr>
<tr>
<td>Stockroom</td>
<td>Reports</td>
<td>While there is no activity to be tracked going out of a Point of Use (PoU) stockroom, I would expect to see some activity (transfers/restocking amounts) when running this report for a PoU. Also, I think the fact that PoU stockrooms can be selected for</td>
<td>ERM-15768</td>
<td>9.2.1</td>
</tr>
<tr>
<td>MODULE/FUNCTION</td>
<td>OPERATION</td>
<td>SUMMARY OF DEFECT</td>
<td>INTERNAL DEFECT #</td>
<td>DETECTED IN VERSION</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Structure Search</td>
<td>Search Results</td>
<td>this report should provide accurate activity history - regardless if there are &quot;requests&quot; (in other types of stockrooms) or other transaction types.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structure Search</td>
<td>Structure Search</td>
<td>The user would receive an error after executing a large structure search, and, before the structure search was completely finished, proceed to source search and use the structure navigator.</td>
<td>ERM-15553</td>
<td>9.2.0</td>
</tr>
<tr>
<td>Structure Search</td>
<td>Structure Search</td>
<td>Same Structure driver against multiple databases - structure search continues with the database(one of the multiple databases of the same driver) even if it is unselected</td>
<td>ERM-15685</td>
<td>9.2.0</td>
</tr>
<tr>
<td>Structure Search</td>
<td>Structure Search</td>
<td>Issue with structure search not bringing structures from next database if the previous database fails to bring results</td>
<td>ERM-15640</td>
<td>9.2.0</td>
</tr>
<tr>
<td>Structure Search</td>
<td>Structure Search</td>
<td>Researcher does not support 2 ChemACX structure DBs if they are in different schemas</td>
<td>ERM-15811</td>
<td>9.2.0</td>
</tr>
<tr>
<td>Structure Search</td>
<td>Structure Search</td>
<td>When two structure databases use the same key type (e.g. customer compound id). The structure search searches only one database not both.</td>
<td>ERM-15777</td>
<td>9.2.0</td>
</tr>
<tr>
<td>User Interface</td>
<td>Sorting</td>
<td>The grids (Receiving, lab inventory, etc) did not sort correctly when sorting by a date or numeric fields.</td>
<td>ERM-15651</td>
<td>9.2.0</td>
</tr>
</tbody>
</table>
Known Issues

The following are known issues that are judged to be of operational significance and were found a) during JAGGAER internal testing of ERM 9.3.0 or b) detected in previous releases of ERM since the last publication of release notes.

<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>OPERATION</th>
<th>SUMMARY OF DEFECT</th>
<th>INTERNAL DEFECT #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container</td>
<td>History</td>
<td>In container history window, the <strong>Old Value</strong> shows the room level. The sub-location isn't shown for transfer. <strong>Example:</strong> when container was moved from Media&gt;B1&gt;F1&gt;R1&gt;S1 where S1 is a sub-location to Media&gt;B1&gt;F1&gt;R1&gt;S2 where S2 is a sub-location. The sub-location shows for the <strong>New Value</strong>, but not the <strong>Old Value</strong>.</td>
<td>ERM-15789</td>
</tr>
<tr>
<td>Container Operations</td>
<td>E-mail Notification</td>
<td>When a container operation is performed, a user receives an in-line notification but not an e-mail notification.</td>
<td>ERM-16007</td>
</tr>
<tr>
<td>Container Operations</td>
<td>History</td>
<td>Container history record is not created when a container with a status of 'In Transit' is transferred into its current location (i.e. the container has not moved, but the status is being updated) the status of the container is updated to Available but there is no location record nor is there a status record in the history.</td>
<td>ERM-15981</td>
</tr>
<tr>
<td>Storeroom Request</td>
<td>Report</td>
<td>For storeroom items on a request, the Shopping Cart Submit Report displays the Catalog Number instead of the container bar code when the Shopping Cart is held for approval. The container bar code should be displayed in this field.</td>
<td>ERM-16006</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When the Shopping Cart items become a request, the Shopping Cart Submit Report properly displays the container bar code.</td>
<td></td>
</tr>
<tr>
<td>Storeroom Request Fulfillment</td>
<td>Search</td>
<td>The following problem occurs only in the IE browser, it is not an issue in Chrome or Firefox. In the Storeroom Pending Items window when performing a search, if a search term is entered that brings back no results, any subsequent searches will bring back inconsistent results. The user should log out and log back in to rectify the problem.</td>
<td>ERM-16027</td>
</tr>
<tr>
<td>System</td>
<td>Maintenance Mode</td>
<td>Maintenance mode does not work with SSO.</td>
<td>ERM-15946</td>
</tr>
<tr>
<td>System Admin</td>
<td>Locations</td>
<td>If you add too many supplemental locations they get hidden and you cannot see them in the window. You can only see 6 levels.</td>
<td>ERM-16009</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>-----------</td>
</tr>
</tbody>
</table>
| Type-In Requests | External Approvals | There are three types of approval processing types:  
  - None  
  - ERM  
  - External  

  If an approval is set to 'External', a request item should be created with an item status of "External Approval Required". For example if the controlled approval is set with processing type of "External", when the shopping cart is submitted the item gets created with "External Approval Required".

  For Type In items, if the approval is set to "External", the status gets set to "New" instead of "External Approval Required". | ERM-15782 |
# Appendix – Permission Names

Some permissions have been renamed from ERM 9.2 to ERM 9.3. The following table lists the names in ERM 9.2 and the new names in ERM 9.3

<table>
<thead>
<tr>
<th>Old Permission Name</th>
<th>New Permission Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container Administration Menu Item Automated Store Retrieve</td>
<td>ERM Researcher Container Automated Store Retrieve*</td>
</tr>
<tr>
<td>Container Administration Menu Item Automated Store Submit</td>
<td>ERM Researcher Container Automated Store Submit*</td>
</tr>
<tr>
<td>Container Administration Menu Item Change Substance</td>
<td>ERM Researcher Container Change Substance</td>
</tr>
<tr>
<td>Container Administration Menu Item Delete</td>
<td>ERM Researcher Container Delete</td>
</tr>
<tr>
<td>Container Administration Menu Item Dispose</td>
<td>ERM Researcher Container Dispose</td>
</tr>
<tr>
<td>Container Administration Menu Item Edit</td>
<td>ERM Researcher Container Edit</td>
</tr>
<tr>
<td>Container Administration Menu Item Put In Transit</td>
<td>ERM Researcher Container Put In Transit</td>
</tr>
<tr>
<td>Container Administration Menu Item Qty Update</td>
<td>ERM Researcher Container Qty Update Set Current or Tare Amount</td>
</tr>
<tr>
<td>Container Administration Menu Item Remove Reservation</td>
<td>ERM Researcher Container Remove Reservation</td>
</tr>
<tr>
<td>Container Administration Menu Item Replicate</td>
<td>ERM Researcher Container Replicate</td>
</tr>
<tr>
<td>Container Administration Menu Item Reserve for Owner</td>
<td>ERM Researcher Container Reserve for Owner</td>
</tr>
<tr>
<td>Container Administration Menu Item Reserve for Project</td>
<td>ERM Researcher Container Reserve for Project</td>
</tr>
<tr>
<td>Container Administration Menu Item Restore from Dispose</td>
<td>ERM Researcher Container Restore from Dispose</td>
</tr>
<tr>
<td>Container Administration Menu Item Transfer</td>
<td>ERM Researcher Container Transfer Location</td>
</tr>
<tr>
<td>Display Delivery Request Tab</td>
<td>ERM Researcher Storeroom Request Fulfillment</td>
</tr>
<tr>
<td>ERM Researcher Lab Inventory</td>
<td>ERM Researcher Container Search</td>
</tr>
<tr>
<td>ERM Researcher Tile Container Operations</td>
<td>ERM Researcher Container Scan</td>
</tr>
</tbody>
</table>

* ERM 9.3 does not support the submission/retrieval of containers to/from automated stores. The permissions will be used in future releases.
JAGGAER Customer Support

Please contact JAGGAER Support prior to installing ERM 9.3.0. To reach the ERM Customer Support team:

**Hours:** 8:00 am to 6:00 pm US ET, Monday – Friday

**E-mail:** ermsupport@jaggaer.com

**Phone:** 800-233-1121 – US (Option 1, 2)

919-659-4200 - Intn'l

**Online issue submission:** Use the following link to access the JAGGAER Solutions Portal:

https://sciquest-custserv.force.com/support/