ENTERPRISE REAGENT MANAGER
VERSION 9.3.1

RELEASE NOTES FOR ERM VERSION 9.3.1
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ENTERPRISE REAGENT MANAGER
VERSION 9.3.1

PREPARED BY

JAGGAER

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<thead>
<tr>
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<th>AUTHOR</th>
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Introduction

This document lists enhancements and modifications for Enterprise Reagent Manager (ERM) 9.3.1. The baseline for comparison is ERM 9.3.0. 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
For deployed ERM environments, details how to upgrade the ERM environment.

ERM Installation Guide
For deployed ERM environments, use this document in conjunction with the ERM Upgrade Guide to upgrade the ERM environment.

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 9.3.1. Details on these and other enhancements for ERM Researcher and all other modules are provided in the rest of this document.

Lab-to-Lab Transfer Requests

ERM Researcher now provides the ability for lab requests to be fulfilled by storeroom personnel, functionality not previously available in ERM. Researchers can search for, add to the Shopping Cart and submit a request for a container in a lab in the same manner as they could for a container in a storeroom. The owner of the container is automatically notified of a request for one of their containers via an ERM notification (either e-mail and/or in-app). By simply selecting an “Authorize” or “Reject” link embedded within the notification, the owner can either authorize or reject the request.

In general, lab storeroom request items are fulfilled in the same way as normal storeroom request items.

Container Dispensing

The implementation of fulfillment of dispense storeroom and lab requests completes the migration of storeroom (delivery) request fulfillment functionality from the ERM Operations module to ERM Researcher.

Automated Store Integration

The functionality to submit and retrieve containers from an Automated Store has been migrated from ERM Operations to ERM Researcher. This functionality was previously accessible from the Container Operations window in ERM Operations. With the migration to ERM Researcher, the Automated Store functionality allows for a simplified user experience.
Lab-To-Lab Transfer Requests

In previous versions of ERM, a researcher could request containers from a storeroom. A storeroom technician would fulfill the request on behalf of the researcher. Containers which were located in a laboratory were not available for requesting. In ERM Researcher, a researcher could place the desired containers on a “To-Do List”; however, there was no requesting or fulfillment process for containers in a laboratory.

With the ERM 9.3.1 release, containers in properly configured laboratories and serviced by storerooms configured to support the process can be requested by a researcher in the same manner as a container in a storeroom. A storeroom technician can now fulfill those laboratory requests in the same general manner as a storeroom request and perform the same functions on the request (i.e. dispensing, substitution, etc.). Note that the “To-Do List” functionality is still available for those labs that do not accept requests (“Self-Serve labs”).

Additionally, the owner of the requested container will be notified that a colleague has requested one of their containers and the owner can authorize or reject this request simply by clicking on a link in the notification.

Configuring Locations for Lab Transfer Requests

The lab transfer process is enabled on a lab-by-lab basis. For a lab to use the new lab request process, the new lab attribute Self-Serve Lab must be un-checked on the Room Edit page in the System Administration module. Additionally, the lab must be associated with a Store Room (denoted as the lab’s “Storage Room”) that will fulfill requests for containers located in the lab. To indicate that a storage room accepts requests the Self-Serve Store Room attribute must be un-checked on the Room Edit page in the System Administration module.

On upgrading to ERM 9.3.1, all labs will remain self-serve labs, and this is the default setting for newly created labs. After the upgrade, if the user wishes for the labs to accept requests, they must explicitly configure the labs as detailed above.
Lab configured to accept container requests
Storeroom configured to process lab container requests

AFC Storeroom

Name: AFC Storeroom
Active
Auto Checkin

Inventory Control: NONE
Room Type: STORE ROOM
Square Feet: 0

Supervisor: Whitley, Steve (swhitley@sciquest.com)

Receiving
Arsenal FC>Building 1>1>AFC Receiving 1

Storage Room
Arsenal FC>Building 1>1>AFC Storeroom
Requesting Containers from a Lab

Source Search

To request a container from a lab, the user searches for a container as is done in previous releases. The results of the search are displayed on the Labs search page. Containers that can be requested from a lab will display the Shopping Cart icon. Containers which must be added to the To-Do List for self-service action by the researcher will display the Add to To Do List icon. To add the container to shopping cart, the user clicks on the Add to Shopping Cart icon.

If a container is already on an open Lab request, when the user attempts to add the container to the shopping cart they will be notified that the selected container is not available and it will not be added to their Shopping Cart.
Shopping Cart

In the Shopping Cart, a lab container item will appear in the same shopping cart section with storeroom container items, and will display the same container and material information as a storeroom container. The Shopping Cart will show the room where the container is located.

As with requests for containers in storerooms, a researcher can also request a quantity to be dispensed from a lab container. The fulfillment of dispensed requests will be detailed later in this document.

Checkout Cart/Request Submission

Once the Shopping Cart is moved to Checkout, a lab container item is subject to the same EHS list processing as a storeroom container item. All rules which apply to a storeroom request are applied to a lab request and a lab container item can be held for approval dependent upon the EHS rules at the site. If a storeroom is configured to not apply EHS processing to storeroom items, any lab serviced by that storeroom will also not be subject to EHS processing.

Request flex fields for storeroom requests also apply to lab requests. Additionally, any customized Check Out rules for storeroom requests are applied to lab requests. A lab request is treated identically to a storeroom request.
Notification and Authorization

Once a Shopping Cart has been submitted, the owner of the lab container will receive notification that a request has been made for one of their containers. Notification is made via e-mail and/or in-app notification. If the lab request shopping cart item needs approval, the owner of the container will not be notified until the submitted Shopping Cart item has been approved.

Below is an example of an authorization e-mail.

Wed 2/28/2018 3:23 PM
From ERMDoNotReply@JAGGAER.com
Container request authorization needed for container: 00002642

To Steve Whitley

The following container request requires your authorization:
Date Submitted: 26.02.18
Container BarCode: 00002642
Common Name: ACRYLIC ACID, 99.5%; 250ML; F.W. 72.06; C3H4O2; M.P. 13 DEGREE C; B.P. 139 (760MMHG); PRIMARY CAS: 79-10-7, 1/EA

Created by: Researcher Whitley (swhitley@sciquest.com - 610.452.0244)
Requested by: Researcher Whitley (swhitley@sciquest.com - 610.492.0244)
Supplier: Fisher Scientific
Catalog Number: AC164252500
Brand: Across Organics
Manufacturer Part Number: 164252500
Current Amount: 250 ML

To authorize the request, click the following link:
https://nsq-qa.sciquest.local/15080/ernd-client/app/etoken/v2/?T01bOHri9KP0R60wxmCkA2zYPMeGMgOXn%2F0FCb0xieqg%3D

To reject the request, click the following link:
https://nsq-qa.sciquest.local/15080/ernd-client/app/etoken/v2/?FzocGlGelihfr%2FS4IPrgcvxhi1wwPFYiy0RTRxYdqf0%3D

A lab request item for a container is initially created with a status of Hold. Until authorized, a lab request cannot be fulfilled. (Note that a fulfillment technician may cancel an item with a status of Hold. Please read the “Fulfilling Lab Requests” section for more information). The notification message contains two clickable links, one to authorize the container request and one to Reject the request.
Clicking the Authorize link will open a web browser window displaying the message “Container request approved.” The status of the lab request is updated to **New** and it can now be fulfilled by the storeroom technician.

Clicking the Reject link will open a web browser window displaying the message “Container request rejected.” The status of the lab request is **Cancelled** and the person who submitted the request is notified via e-mail that their request has been cancelled.

Once a container request has been authorized or rejected, the response link provided in the notification message becomes invalid. Clicking either of the response links for a request that has been formerly authorized or rejected will open a web browser window displaying the message “This operation is no longer valid.” and no action will occur.

Note that the notification links are only valid for seven days. If the user clicks on the link seven days after they were notified, they will receive a message that “This operation is no longer valid”. In this case, the item must be authorized or rejected by the storeroom technician.
Fulfilling Lab Requests

A storeroom technician with the **ERM Researcher Storeroom Request Fulfillment** permission can access the Storeroom Pending Items window to search for open ERM Storeroom Requests and Lab Requests with the intention of fulfilling the request. The technician can access this window from either the home page or the Main Menu.

- Selecting a storeroom from the **Storeroom Pending Items** panel on the Home Page.

  On the homepage, the number of items next to the storeroom (as pictured below), is the total of number of items to be processed by that storeroom – this contains both requests for items in the storeroom as well as requests for items in any associated lab. In the picture below, “Storeroom 102” has 16 total request items for containers to be processed; some of the containers may be in the storeroom, and some may be in labs associated to the storeroom.

- 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.
The Storeroom Pending Item page has been enhanced by adding a radio selector which determines what items are displayed on the page. Selecting the “Storerooms” button displays items for which requested containers are located in the storeroom. Selecting the “Labs” radio button displays items for which the requested containers are located in labs associated with the storeroom. The technician may toggle between displaying storeroom and lab requests. Note that if there are no lab request items, the radio buttons will NOT be displayed.

The total number of items listed next to the storeroom in the drop down list is the total number of both storeroom and lab requests to be processed by the storeroom.

In the picture above there are a total of nine items to be fulfilled by the storeroom technician. Two of the items are for items in the storeroom, while seven of the items are for items in the labs.

No changes have been made in terms of searching for and fulfilling storeroom requests for items located in storerooms. Please read the “ERM 9.3.0 Release Notes” for detailed information on searching for and fulfilling storeroom requests.
Searching for Lab Container Requests

As previously detailed, when a request is initially submitted for a lab container, it will have a status of **Hold**. For lab requests, the Storeroom Pending Items page will display items with a status of “New”, “Sent” or “Hold”. Note that an item with a status of “Hold” cannot be fulfilled. To change the item status from Hold to New, either

1) the owner of the container must authorize the request via hyperlinks within a notification (as previously detailed), or

2) the fulfillment technician may authorize the request, by selecting the “Authorized” icon next to the request item (detailed below).

Items with a status of “Cancelled” or “Fulfilled” are not returned on the Storeroom Pending items window; however, they can be retrieved on the Storeroom Closed Items window.

The lab request items that are returned are governed by the “All Sites/My Sites” preference as well as the “Search Term”. These criteria work in exactly the same manner as for searching storeroom requests. Please read the “ERM 9.3.0 Release Notes” for detailed information.
## Processing Lab Requests

### Row Level Icons

The following details the function of each icon on the Storeroom Pending Items when Lab requests are displayed.

<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>🔄 View Details</td>
<td>Displays detailed information about the request item. This icon will always be displayed.</td>
</tr>
<tr>
<td>🥉 View Container Actions</td>
<td>Opens the “Actions Required” window. This icon will 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 room from which it was requested. This icon will also be displayed if a request has been made for a specified amount from the source container (i.e. a Dispense Request).</td>
</tr>
<tr>
<td>👤 View Warnings</td>
<td>This is the same icon 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>📄 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>📚 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>☑️ Authorize Item</td>
<td>Displayed only for lab requests with a status of Hold. Clicking this icon will update the item status to New.</td>
</tr>
<tr>
<td></td>
<td>After the item has been set to “New”, the item may be fulfilled.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>🔄 Set to New</td>
<td>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’. Requests which have been fulfilled via a Dispense operation cannot be Set to New.</td>
</tr>
<tr>
<td>✅ Fulfill Successful</td>
<td>The green checkmark is displayed after an item has been fulfilled.</td>
</tr>
<tr>
<td>⏳ Close/Cancel Successful</td>
<td>The ‘Cancelled’ icon is displayed after the storeroom technician cancels a request.</td>
</tr>
</tbody>
</table>
Menu Options on Search Results

In addition to the icons on each search result row, there are also menu options available for each item via a drop down list. 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” or “Hold”, 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. Please read the “ERM 9.3.0 Release Notes” for details of this notification.</td>
</tr>
<tr>
<td>📦 View Container</td>
<td>Opens the container detail window.</td>
</tr>
<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>错 Substitute Container</td>
<td>Opens the ‘Substitute Container’ window, allowing the technician to replace a requested container with an alternate container. Lab requests items with a status of Hold cannot be Substituted.</td>
</tr>
<tr>
<td>🍀 Dispense</td>
<td>Opens the ‘Dispense Container’ window, allowing the technician to allocate a portion of a requested container into one or more containers. Lab requests items with a status of Hold cannot be Dispensed. Please read the “Dispensing Containers for Storeroom Requests” section later in this document.</td>
</tr>
</tbody>
</table>
Action Buttons on the Window

There are four action buttons at the top of 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></td>
<td>Lab request items with a status of <strong>Hold</strong> will not appear on the Pick List if they are selected.</td>
</tr>
<tr>
<td>Print Delivery Report</td>
<td>Prints a delivery report for the selected items.</td>
</tr>
<tr>
<td>Fulfill</td>
<td>Fulfilling an item in a lab works in the same way as fulfilling an item in a storeroom. Please read the “ERM 9.3.0 Release Notes” for detailed information about fulfilling an item.</td>
</tr>
<tr>
<td></td>
<td>Note that Lab requests items with a status of <strong>Hold</strong> cannot be Fulfilled. If multiple items are selected to be fulfilled, and some items have a status of New and some items have a status of Hold, when the user clicks the “Fulfill” button they will receive the following error and <strong>none</strong> of the items will be fulfilled.</td>
</tr>
<tr>
<td></td>
<td><strong>⚠️ Cannot fulfill items. Some items have Hold status.</strong></td>
</tr>
<tr>
<td>Scan</td>
<td>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</td>
</tr>
</tbody>
</table>

Scan to Fulfill

The scan window is used to fulfill request items by scanning container bar codes. Scanning in bar codes to fulfill items in labs works in the same way as scanning in items in storerooms, except a user will receive an error when scanning in a bar code that is on a request item with a status of “Hold”

**⚠️ Container 00003770 is not on a request with a status of NEW.**

Please read the “ERM 9.3.0 Release Notes” for detailed information on Scan to Fulfill.
**Substitute Container**

A Storeroom Technician can replace the requested container on a storeroom or lab request item by searching for an alternate container. The technician chooses a storeroom or lab request item in Storeroom Request Fulfillment result set and selects the Substitute Container option to open the 'Substitute Container' window shown below. Please read the “ERM 9.3.0 Release Notes” for detailed information on Substitute Container.

**Important Note:** Only containers in storerooms are displayed on the substitute page. Containers in labs will not be displayed.

Below is a picture of the substitute container page.
Fulfilling a Storeroom Dispense Request

A storeroom technician can dispense a quantity from a container in response to a researcher’s dispense request or of their own volition. This feature previously existed in ERM Operations and has been migrated to ERM Researcher in ERM 9.3.1.

When a researcher has submitted a dispense request for a container in a storeroom or a lab, the request will have the icon displayed. Please note, this icon is displayed for a dispense request and when there is an issue with the requested container (i.e. container is expired, the container has a status other than “Available/In Use” or the container is no longer in the storeroom or lab from which it was requested).

When a dispense has been requested, clicking the icon will open a notification window (shown below).
Selecting **Dispense** from the menu will open the **Dispense Container** window.

When a researcher has submitted a dispense request, the Dispense window opens showing the **Requested Number of Containers**, the **Requested Amt per Container** and the generated containers with the **Amount** populated. If the technician uses pre-printed bar codes, the bar code field will be blank. The technician can either scan or key in the bar codes to be dispensed. The technician can opt to dispense into fewer containers or more containers than originally requested by changing the **Number of Containers to Dispense** selection. Additionally, the storeroom technician can adjust the amount dispensed into each container.

When the technician initiates a dispense operation (i.e. the researcher has not requested a dispense), the Dispense window opens without **Requested...** information and the Number of Containers to Dispense is set to 1.
Use of Balance

For technicians whose storerooms are integrated with a lab balance, clicking the balance icon \( \text{ \includegraphics[width=1cm]{balance_icon.png} } \) will provide the weight of the dispensed container in the unit of measure set on the lab balance.

Note the following:

- For the balance icon to be displayed, the user must have selected a scale as well as set the “Capture Gross Weight” preference to “Yes” on the User Preference page.
- The quantity unit for the dispensed containers will either be the unit of the source container or the unit as obtained from the balance, if a balance is being used. The unit cannot be changed by the user.
- Note that the amount obtained from the balance is considered to be the destination container’s current amount, NOT the container’s gross weight NOR the container’s tare weight. Because of this, the user should place the empty container on the balance and zero it out prior to dispensing and weighing the dispensed container.
- If the source container quantity is measured in a volume unit and the material in the container does not have a specific gravity, the following message will appear on the dispense window, and the balance cannot be used:

  This material does not have a specific gravity and cannot be weighed.

Save Button

When the technician clicks ‘Save’, the following occurs:

- Specified number of containers will be created
- Storeroom / Lab request is marked as Fulfilled if the destination room is “auto-checkin” or Sent if destination room is not “auto-checkin”.
- Dispensed containers are transferred to the researcher
- Source container is decremented by the total of the dispensed container(s)
- Researcher is notified that the request has been processed (via in-app and/or e-mail notification).
The notification message, shown below, shows the barcode of the source container as well as the barcodes of the dispensed containers.

<table>
<thead>
<tr>
<th></th>
<th>Date Created</th>
<th>Notification Type</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>09.03.2018 15:26:08</td>
<td>Storeroom Item Processed</td>
<td>Storeroom Request Item: Whitley00000874 has been Fulfilled.</td>
</tr>
</tbody>
</table>

The following item has been Fulfilled.

Request #: 1409
Description: (1-(5-FLUOROPENTYL)-1H-INDOL-3-YL)-(4-METHYLNAPHTHALEN-1-YL)METHANONE MF C25H24FN0 MW 373.47 1354631-24-5 MFDO22421647 000957-250MG

Date Submitted: 09.03.18
Requested Bar Code: 00000242
Delivered Bar Code(s): 00227310, 00227311, 00227312, 00227313, 00227314
Dispensed Container: Y
Substituted: N
Supplier: Fisher Scientific
Catalog Number: 50684572
Brand: Matrix Scientific
Manufacturer Part Number: 000957-250MG
Pkg: 250 mg (250 mg)
Storage Code:

Comments:

**Close Button**

Selecting ‘Close’ will return the technician to the Storeroom Pending Items window. No containers will have been created and the request will remain unprocessed.
Do Not Track Dispensed Containers

Storerooms that dispense containers of materials which do not need to be tracked can use the new room attribute *Track Dispensed Containers* (set on the Room Edit page in the System Administration module). Previously, ERM used an installation-wide configuration to determine whether dispensed containers should be tracked. Making this a room-level attribute offers more flexibility in the tracking of chemical resources.

By default, when a storeroom is designated as a *Dispense Store Room* the *Track Dispensed Containers* attribute is selected. Unselecting the *Track Dispensed Containers* for a room will cause the following to occur when the storeroom technician dispenses containers for a request:

- Specified number of containers will be created
- Storeroom / Lab request is marked as Fulfilled, regardless of destination room’s “auto-checkin” setting
- Dispensed containers are transferred to the researcher
- Dispensed containers are disposed
- Source container is decremented by the total of the dispensed container(s)
- Researcher is notified that the request has been processed (via in-app and/or e-mail notification)

Note: on upgrade to ERM 9.3.1, all dispensed storerooms will have the Track Dispensed Containers set to yes. (That is dispensed containers should be tracked).
Below is the Dispense Container window for a room which does not track dispensed containers. No bar codes are displayed and installations which use pre-printed bar codes will not be able provide bar codes. While no bar code information is displayed, and bar codes may not be entered, when the containers are created, they will be assigned an ERM generated bar code.
Automated Store Integration

ERM integrates with Automated Stores for container storage and retrieval. With the ERM 9.3.1 release, this functionality has been migrated from ERM Operations to ERM Researcher. Within ERM, an automated store is a room with the Automated Store attribute selected (set on the Room Edit page in the System Administration module).

Automated Store Submit

The Automated Store Submit window allows a technician with the **ERM Researcher Container Automated Store Submit** permission to register containers into an automated store. The overall process is as follows:

1. User scans (or types) in container bar code. As each container is scanned, the ERM Rules Engine checks to see if processing for that container can continue.
2. Any existing values for the automated store zone, class, and type attributes for the scanned container are displayed. The user will set these values if not previously set, and can also modify existing values.
3. User may set the purity attribute for the scanned container.
4. User weighs container (optional)
5. User adds container the list of containers to be submitted to the automated store. Client-specific logic can be implemented at this point to enforce any additional logic to determine if container can be added to the list.
6. Once all containers have been added to the list, user submits the containers to the automated store.
7. A Submit record is written for each submitted container to the AutomatedStoreCommandQueue table.

The Automated Store Submit window (shown below) is accessed by selecting **Automated Store Submit** from the Container Operations section of the Main Menu.
The picture below shows the Automated Store Submit window, with two containers already on the list to be submitted to the automated store and container 00000663 having just been scanned.

**Step 1 – User scans (types) bar code** into this field and clicks scan or hits enter. The container will be checked against Container Operations rules to determine if the container can be processed. If there are rules violations, a message will appear and the user will be prohibited from processing the container. Please read the "Automated Store Operations and Container Rules" section later in this document for more information.

**Step 2– User selects automated store attributes** for the container and weighs the container.

If a container has previously been submitted to the Automated Store, the container’s current automated store attributes will be populated when the container is scanned.

**Step 3 – User adds container to the list** of containers to be submitted to the automated store.

List of containers to be submitted to automated store.

**Step 4– User selects automated store and submits list of containers to automated store.** After the containers have been submitted they will be removed from the page.

List of automated stores is any active room, regardless of site, with the automated store attribute set to Yes.

NOTE: If the technician navigates away from Automated Store Submit page without submitting the scanned containers to the Automated Store, the containers will remain on the Automated Store Submit window as long as the technician remains logged into ERM Researcher.
Following provides more detail on Automated Store Submit functionality.

<table>
<thead>
<tr>
<th>Weighing Container</th>
<th>Each container may be weighed to determine the container’s current amount.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The Gross Weight field is visible if</td>
</tr>
<tr>
<td></td>
<td>• If the user has set their “Capture Gross Weight” preference (via the User Preference)</td>
</tr>
<tr>
<td></td>
<td>The Gross Weight field is not visible if</td>
</tr>
<tr>
<td></td>
<td>• The “Capture Gross Weight” preference is not set OR</td>
</tr>
<tr>
<td></td>
<td>• The container has no tare weight OR</td>
</tr>
<tr>
<td></td>
<td>• If the container is measured by volume and the material in the container does not have a specific gravity.</td>
</tr>
<tr>
<td></td>
<td>If the Gross Weight field is visible, the Current Amt field is disabled.</td>
</tr>
<tr>
<td></td>
<td>If the Gross Weight field is not visible, then the Current Amt field is enabled, and the user may enter the container’s current amount, as pictured below.</td>
</tr>
<tr>
<td></td>
<td>The balance button only appears if the user has set the “Capture Gross Weight” and the user has selected a scale on the User Preference Page.</td>
</tr>
<tr>
<td>Add to List</td>
<td>When the user clicks “Add to List” the container’s automated store attributes and amount are updated and saved to the ERM database.</td>
</tr>
<tr>
<td></td>
<td>Custom logic specific to the client’s installation is run to determine if the container may be added to the list of containers to be submitted to the automated store. (This custom logic is found in database package pkgERMCustKardex.StorageApproval.)</td>
</tr>
<tr>
<td></td>
<td>Note that any existing custom logic will continue to work without any modification after the upgrade. Please contact JAGGAER if you have questions pertaining to custom logic for your installation.</td>
</tr>
<tr>
<td>Submit</td>
<td>The submit button creates entries into the AutomatedStoreCommandQueue table in the exact same manner as was done in previous ERM releases. After the containers have been submitted, they will be</td>
</tr>
</tbody>
</table>
removed from the page. Note that storage compatibility and control zone limits are **NOT** checked when containers are submitted to the automated store.

Automated Store Retrieve

From the Container Search page, a user with the **ERM Researcher Container Automated Store Retrieve** permission can retrieve containers from an automated store.

As with other container operations executed from the Container Search page, the user will first search for the containers to be retrieved from the Automated Store. After selecting containers, the user selects Retrieve From Automated Store from the operation menu. The Retrieve From Automated Store process goes through the same process as all other operations which do not require input (such as Dispose, etc) and checks Container Rules to determine if the container is allowed to be retrieved from an automated store. Please read the “Automated Store Operations and Container Rules” section for more information.

When a container is retrieved from an Automated Store the following occurs:
- Container status for each container is set to In Transit
- An "In Transit" container history record is written
- A Retrieve record is written to the AutomatedStoreCommandQueue table.

Automated Store Operations and Container Rules

ERM will check container operation rules to see if container may be submitted to or retrieved from an automated store. Rules are created via the “View/Edit Container Operation Rules” window. Any container rules created in ERM versions earlier than 9.3.0 (via an Excel spreadsheet) will no longer be used. **If you are upgrading from a version earlier than 9.3.0, no container rules will exist, and the system administrator must create new rules if you wish to prohibit certain operations.**

There are two operation conditions that may be useful in creating rules regarding automated store operations. These conditions are “Container is in an automated store” and “Container is Not in An Automated Store”
Automated Stores and Storeroom Request Fulfillment

When a storeroom request is fulfilled, if the requested container is in an automated store, then when the request is fulfilled, ERM will automatically write a **Retrieve record** to the AutomatedStoreCommandQueue table, to obtain the requested containers. This functionality is migrated from ERM Operations in its original form and no changes to the integration are expected to be required for the upgrade to ERM 9.3.1.
**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><strong>Container Operations</strong></td>
<td>Rules</td>
<td>A container operation rule may now be made inactive. When a rule is inactive when an operation is performed. Note that inactive rules will not be exported.</td>
</tr>
</tbody>
</table>
| **Create Container**      | Container Location Picker | Previously on the Create Container page a user could only select a Use location for the container from the drop-down list of Alternate Delivery Locations of the container owner. In this release, the user can select **any** Use location the selected owner of the container can access. The Owner of the Container will still determine which locations are displayed:  
- The available locations are based on the Owner (e.g. List Controlled Rooms, etc.)  
- The All/ My Sites preference is based on the logged-in user |
| **Create Container**      | Create Multiple Containers | When a user creates a new container via the Material Search or Material Edit pages, the user can now specify the number of containers they want to create. From the Material Search or Material Edit page, when the user clicks “Create Container” the user will be taken to a page where they specify the number of containers to create (if **not** using pre-printed bar codes) or scan in as many pre-printed bar codes as are needed.  
From this page, the user is taken to the container new page which lists all the containers to be created and from which the user enters detailed container information – such as amounts, supplier, flex fields, etc. The information entered on this page applies to **ALL** containers that will be created. |
<table>
<thead>
<tr>
<th>FUNCTION SUMMARY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Following is initial new page when pre-printed bar codes are being used.</td>
<td>As in previous releases, the user can select the owner of the container. For each container to be created, the user scans (enters) in the bar code, and clicks add.</td>
</tr>
<tr>
<td>Following is initial new page when pre-printed bar codes are NOT being used:</td>
<td>As in previous releases, the user can select the owner of the container. User specifies the number of containers to create. User specifies whether or not to print labels after containers have been created. Labels are printed AFTER the containers have been created. The label type, printer, and label copies is defaulted to the user’s preference. If they wish to change the type, printer or copies the user may click in the white area in which label information is displayed.</td>
</tr>
</tbody>
</table>
## Create Container

<table>
<thead>
<tr>
<th>FUNCTION SUMMARY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Lab Balance Integration | In this release, weighing functions have been incorporated into the Create Container page. This functionality is similar to the weighing functions found on the Receiving page and Set Amount page. From the Create Container page, users can now:  
- Manually enter the gross weight for a container  
- Integrate with a Lab Balance to capture gross weight  
- Weigh containers measured in volume units  
For the weighing process:  
- Tare weight is always calculated; there is no manual entry of the tare weight  
- Calculation for tare is the only calculation completed when entering Gross weight |

For either pre-printed or not pre-printed, Once the user clicks “Continue” the user is taken to the page from which the detailed container information may be entered. Below is a partial picture of the page in which five containers will be created. Note that the page displays the five bar codes of the containers to be created.

![Create Container Page](image-url)
<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>FUNCTION SUMMARY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>• There is a Gross weight / unit field. This is only displayed if the Capture Gross Weight User Preference is set to True</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Gross Weight Unit is display only. For manual entry of gross weight, the unit is always ‘g’. When integrated with a balance, ERM accepts the unit from the Lab Balance (as with Receiving and the Set Amount container operation)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The Lab Balance icon will appear if a balance is selected for the user preferences on the User Preference page</td>
</tr>
<tr>
<td><strong>Data Loader</strong></td>
<td>Locations Self- Serve Flag</td>
<td>When creating rooms via the data loader, the self- serve flag may be specified for labs or storerooms. Valid Values are</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• “Y” – room is a self-serve lab or storeroom</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• “N” – room is not self-serve</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If not specified in the file, the self-serve flag for labs is set to “Y” by default, while the self-serve flag for storerooms is set to “N”.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If a self-serve flag is set in the data loader for stockrooms, it will be ignored.</td>
</tr>
<tr>
<td><strong>Data Loader</strong></td>
<td>Locations Storage Code</td>
<td>There is now a new Data Loader Load Type which allows storage codes to be assigned to locations. The user needs the new permission “<strong>Data Loader Load Location Storage Codes</strong>” in order to load location storage codes. During upgrades, this new permission will be added to any role that currently has the “Data Loader Load Location” permission.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Please read the appendix “<strong>Data Loader – Locations Storage Code</strong>” for the format of this new file</td>
</tr>
<tr>
<td><strong>Data Loader</strong></td>
<td>Create Container</td>
<td>The Data Loader Create Container function now allows the user to specify a container’s Storage Location by specifying the container’s storage site, building, floor, room, and optionally sub-location, when loading containers.</td>
</tr>
<tr>
<td>FUNCTION</td>
<td>FUNCTION SUMMARY</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------</td>
<td>-----------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Receiving</td>
<td>Result Set Columns</td>
<td>The placement of certain columns in the Receiving search results have been modified to make information needed by Receiving technicians more immediately visible. In particular, the catalog number field has been placed in a more prominent location.</td>
</tr>
</tbody>
</table>
| Requests | Request Information | The Request Information window that may be accessed from various pages (such as My Requests) has been enhanced as follows:  
- During fulfillment of a storeroom or lab-to-lab request, if one or more containers are substituted for the requested one(s), the Request Information window will now display both the requested container(s) and the actual delivered container(s).  
- Line item detail now displays the Purchase Order Line # in addition to the Purchase Order #, Request #, and Request Line # (which were displayed in previous releases). |
| Shopping Cart | Order Qty | Previously a user could only pick a maximum of “100” for Order Qty on the Shopping Cart page. In this release the maximum has been increased to 99,999. (Note that in this release the maximum Order Qty for Type-In items is still 100.) |
| Shopping Cart | Punchout Cart Submission | When ERM is configured as a punchout, there is now a System-level configuration option to prevent users from submitting Shopping Carts if they have logged into ERM directly. This setting only affects users in a punchout configuration and is intended to avoid creating held carts in ERM installations where no users are reviewing held carts as a standard practice.  
If the setting PunchoutInstallation.AllowDirectLogInCartSubmit is FALSE and the user has logged directly into ERM without punching out:  
- On the Shopping Cart page, the Proceed to Checkout button is disabled  
- The text Not Punched Out is displayed next to Proceed to Checkout button  
The user can still build a Shopping Cart (which automatically saves), but they cannot progress to the Checkout Page.  
The default setting for ClientConfig.PunchoutInstallation.AllowDirectLogInCartSubmit is TRUE. |
<table>
<thead>
<tr>
<th>FUNCTION</th>
<th>FUNCTION SUMMARY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stockroom</td>
<td>Count Picker</td>
<td>Previously, throughout the stockroom application, whenever a user picked a count from a count widget, they were restricted to a maximum of 100. The maximum has now been increased to 99,999.</td>
</tr>
<tr>
<td>Stockroom Kiosk</td>
<td>Count Picker</td>
<td>In previous releases, when checking out a product via the stockroom kiosk, the product would have to be scanned [N] times if [N] of the product was being checked out. Example: if five boxes of gloves were being checked out, each of the box of gloves would need to be scanned. In this release, the user may now scan the product once, and then enter in the number of products to be checked out. Example: the user scans one box of gloves and then enters 5. The maximum number for a given product that may be checked out is 99,999.</td>
</tr>
<tr>
<td>Web Services Catalog Interface</td>
<td>Shopping Cart</td>
<td>In order to provide a complete “one-stop shop” for researchers, the optional ERM Web Service Catalog Interface (WSCI) module supports searching and ordering against external chemical catalogs or chemical inventory sources via RESTful services. In ERM 9.3.1, when items are selected from an external WSCI source, the requestor can be redirected to the external source with the selected items to complete the request transaction. This requesting approach can be particularly useful when requesting proprietary compounds or building blocks that may require the user to select or provide highly specialized information in order to successfully create a request. If there are items in the user’s shopping cart that need to be redirected to the external application for requesting, the user’s shopping cart will appear as follows:</td>
</tr>
</tbody>
</table>
The button takes the user to another page (pictured below) in which the user can review the items that will be redirected to the external application for requesting.

Clicking “proceed to checkout” on this page launches into the configured requesting page for the external source, passing the items the requestor selected in ERM.

The Requestor can also delete items from this list.

Note that the columns and values that appear on this page is customized for each installation.

Once the requesting page has been launched, the “View Externally Requested Items” button and related message will no longer appear in the ERM shopping cart, and the user can proceed with requesting the items in the ERM shopping cart.

The externally sourced items will not create a request in ERM, and it is not expected that the items will be received in ERM.

<table>
<thead>
<tr>
<th>Web Services Catalog Interface</th>
<th>Source Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>The fields and labels that appear on each of the external channels source search results may be configured for the client’s specific installation. Please contact JAGGAER for more information.</td>
<td></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><strong>API</strong> Container</td>
<td>The Create Container Database API now allows the user to specify a Storage sub-location. The Storage Sub-location is typically used when migrating data from legacy systems that assign containers to a “home location”. In previous releases, the Storage Room could be specified, but not the Storage sub-location. Please read the API documentation for detail information regarding this API.</td>
</tr>
<tr>
<td><strong>API</strong> Container</td>
<td>A new RESTful API has been added that updates the current amount of a container given a gross weight. Please read the API documentation for detail information regarding this API.</td>
</tr>
<tr>
<td><strong>API</strong> Location</td>
<td>A new RESTful and database API has been added that allows new locations to be added. Please read the API documentation for detail information regarding this API.</td>
</tr>
</tbody>
</table>
| **System Administration** Logging | Logging of business logic events that occur via database objects (such as packages and functions) has been greatly enhanced. Previously, business logic that occurred in the database only logged errors (“legacy logging”). With this release, ERM now supports four logging levels for database business logic: Error, Warning, Info and Trace.

The log that captures the above events may be downloaded directly via the System Administration module, without the need to log directly into the database.

To set the database logging level, access the “Set Database Logging Level” menu item in the System Administration module (pictured below). To download the log, access the “View ERMPQSQLLog”. Access to both items requires the **System Administration Tool Logging/DbErrorLogging** permission.

View TblErrorLog allows the user to view logs generated by the legacy logging which only trapped errors. The legacy logging is being migrated to the new logging architecture over the course of several releases. Until this migration is complete, both the TBLERrorLog and ERMPQLSQLLog should be viewed when troubleshooting issues.

Note that the “Logging” menu found in previous version has been renamed to “Application Server Logging”. This menu gives the administrator access to log files found on the application server. |
**Fixed Issues**

These issues were detected in previous releases of ERM and have been fixed in ERM 9.3.1. 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>Approvals</td>
<td>View</td>
<td>Could not view pending approvals if in ERM there were more than 1000 users assigned to a role</td>
<td>ERM-16171</td>
<td>9.3.0</td>
</tr>
<tr>
<td>Approvals</td>
<td>Material Registration</td>
<td>When an item requires new material approval and the user rejects the approval, the new material is still created in the material register. The material should not have been created.</td>
<td>ERM-16152</td>
<td>9.2.1</td>
</tr>
<tr>
<td>Container Operations</td>
<td>Container Transfer</td>
<td>In Container Transfer (owner/location), pushing the Enter button makes the transfer happen even if you are in the middle of trying to find an owner.</td>
<td>ERM-16054</td>
<td>9.3.0</td>
</tr>
<tr>
<td>Container Operations</td>
<td>Container Transfer</td>
<td>On the container search window, if no containers have been selected and the user selects either Transfer operation, the Selected Containers is listed as $containerSearchSelected.size().</td>
<td>ERM-16060</td>
<td>9.3.0</td>
</tr>
<tr>
<td>Container Operations</td>
<td>Replicate</td>
<td>On the Replicate page from the Container Search window, the &quot;Keep Dates of Source Containers&quot; defaults to No (highlighted in blue). However when the container is created, the dates of the destination containers are taken from the source container. Note that if the user clicks 'No' prior to Save, the dates are correctly set as the system date.</td>
<td>ERM-16184</td>
<td>9.3.0</td>
</tr>
<tr>
<td>My Requests</td>
<td>View Structure</td>
<td>If an item has both a CAS number and an MFCD number, and there is no associated structure for CAS number but there is an associated structure for the MFCD number,</td>
<td>ERM-16151</td>
<td>9.2.1</td>
</tr>
<tr>
<td>Feature</td>
<td>Issue Description</td>
<td>ERM Number</td>
<td>Version</td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
<td>------------</td>
<td>---------</td>
<td></td>
</tr>
<tr>
<td>Request Availability</td>
<td>The availability check for items from Fisher did not work. This issue is specific to Fisher items. Checks for items from other suppliers worked as expected.</td>
<td>ERM-15445</td>
<td>9.2.0</td>
<td></td>
</tr>
<tr>
<td>Shopping Cart Submit</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.</td>
<td>ERM-16006</td>
<td>9.3.0</td>
<td></td>
</tr>
<tr>
<td>Source Search Search</td>
<td>Mol weight did not appear on the lab and storeroom source search results. You may also use the filter by Mol weight on these channels.</td>
<td>ERM-16188</td>
<td>9.3.0</td>
<td></td>
</tr>
<tr>
<td>Spend Director Search</td>
<td>When searching hosted catalogs, the ERM user ID of the logged-in user was being passed to Spend Director. This resulted in users at the same site possibly seeing different search results when searching the hosted catalogs. The user ID has been removed from the search. All users at the same site will see the same results from the hosted catalogs when searching by the same term.</td>
<td>ERM-16032</td>
<td>9.2.1</td>
<td></td>
</tr>
<tr>
<td>Storeroom Closed Items</td>
<td>Inactive users were not appearing in the user widget. Inactive users should be appearing in the user widget.</td>
<td>ERM-16045</td>
<td>9.3.0</td>
<td></td>
</tr>
<tr>
<td>Storeroom Pending Items</td>
<td>A Storeroom Request is created for an available container in Storeroom1. After the request was created, but before the item was fulfilled, the container was transferred to another location. On the Storeroom Pending Items page, the fulfilling user should get an alert icon with the message that the container is no longer in the storeroom. The user was not getting an alert.</td>
<td>ERM-16058</td>
<td>9.3.0</td>
<td></td>
</tr>
<tr>
<td>Storeroom Pending Items</td>
<td>In IE, when searching by a text term, if a search brought back zero results, any subsequent search would be back incorrect results. The user would have to log out and log back in for the search to work properly.</td>
<td>ERM-16027</td>
<td>9.3.0</td>
<td></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 9.3.1 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 Operations</td>
<td>Transfer</td>
<td>On the Container Transfer Owner/ Location, the Owner select displays both active &amp; inactive users.</td>
<td>ERM-16004</td>
</tr>
<tr>
<td>Container Replicate /</td>
<td>Pre-printed Bar</td>
<td>When using pre-printed bar codes, if you enter a value that does not exist in the database, but you enter it more than once on the screen, then you get a database issue. The first instance of the provided bar code will be created. The duplicate instance of the provided bar code will generate a database error.</td>
<td>ERM-16167</td>
</tr>
<tr>
<td>Receiving</td>
<td>Bar Codes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Storeroom Request</td>
<td>Pick Report</td>
<td>If a container has moved from between the time the storeroom item was submitted and when it was fulfilled, you can still fulfill the item, however the pick list report shows the location it was in at the time the request was created.</td>
<td>ERM-16160</td>
</tr>
<tr>
<td>Fulfillment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix: Data Loader – Locations Storage Code

In this release there is a new data loader file which is used to assign storage codes to locations. The format of the file is as follows:

<table>
<thead>
<tr>
<th>Storage Code</th>
<th>Site</th>
<th>Building</th>
<th>Floor</th>
<th>Room</th>
<th>Sublocation1</th>
<th>Sublocation2</th>
<th>Sublocation3</th>
<th>Sublocation4</th>
</tr>
</thead>
</table>

The data loader assigns the storage code(s) to the location specified. One or more storage codes may be specified. If specifying multiple storage codes, the storage codes must be delimited by the "^" character – such as "Freezer^VentedOxidizer^ShelfNeutral".

The location specified may be at any level. For example the user may only specify Site and Building, or they could enter Site, Building, and Floor. The locations must already exist in ERM. When a location is specified, all locations to the “left” of the location must also be specified. For example if Sublocation1 is specified, then Site, Building, Floor, and Room must be specified.

Note that “Storage Code” and “Site” are the only required fields.
JAGGAER Customer Support

Please contact JAGGAER Support prior to installing ERM 9.3.1. 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 - International

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

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