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Welcome

Welcome to JAGGAER Research Material Management (RMM) Release 19.1.0!

As of this release, JAGGAER Enterprise Reagent Manager (ERM) has been renamed to Research Material Management (RMM). The version numbering scheme has also been changed so that the first two digits of the version number corresponds to the release year, followed by the number of the release for the year. This release is version number 19.1.0, while the previous major release was 9.4.0

The RMM 19.1.0 Product Release completes the retirement of the Java User Interface in prior versions of RMM and includes major features related to the following functional areas:

- Enhanced Search and Query Capabilities
- Container Scan Operations
- Inventory Reconciliation
- Data Loader
- Reports
- Container Expiration Notification
- Administrative maintenance capabilities, including Cost Centers, Cost Center Groups, Suppliers, and Projects

Key new capabilities and features in the 19.1.0 release include:

- Multi-user kiosk mode for Container Scan Operations
- Inventory Reconciliation statistics for performance reporting
- Additional Data Loader types for Cost Centers, Cost Center Groups, and Inventory Reconciliation Data
- Automated deletion of reports

Objectives

The purpose of the Product Release Notes is to prepare administrators for the upcoming release from a scheduling and application standpoint. There are two main goals of this document.

- To provide a list of key dates associated with the upcoming release, including release availability in both the test and production hosted environments.
- To provide information about major release themes and detailed information about features related to those themes.
RMM 19.1.0 Scheduling & Training Opportunities

Key Dates

The table below provides a list of key dates for the JAGGAER RMM 19.1.0 Product Release.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release promotion to hosted RMM Test Sites</td>
<td>Beginning July 1</td>
<td>The RMM 19.1.0 release will be promoted to Client Test (UIT) environments beginning Monday, July 1, 2019. An email will be sent when the promotion is complete.</td>
</tr>
<tr>
<td>Release available on hosted Production Sites</td>
<td>To be scheduled with each client</td>
<td>RMM Customer Support will individually notify clients of timing of promotion of RMM 19.1.0 to production.</td>
</tr>
<tr>
<td>On-Premise RMM Installations</td>
<td>Please contact JAGGAER RMM Customer Support beginning July 1</td>
<td></td>
</tr>
</tbody>
</table>

Training Opportunities

To help prepare you for the RMM 19.1.0 release, various educational opportunities are provided by JAGGAER. These opportunities are as follows.

<table>
<thead>
<tr>
<th>Video Name</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Review</td>
<td>Webinar to review new features of the 19.1.0 release; Thursday June 27, 9-10:30 am and 6-7:30 pm US East Coast time, web connection details to be announced.</td>
</tr>
<tr>
<td>Web Training</td>
<td>General web training sessions for new features and functions will be offered beginning in July 2019. Sessions, dates and times to be announced.</td>
</tr>
</tbody>
</table>
The Feature Snapshot for RMM 19.1.0

This release provides features that directly impact researchers, operations staff, administrators, and other system users. These features are listed in summary form in the Feature Snapshot below.

Snapshot Key

There are seven columns in the Feature Snapshot. Each of these is explained below:

- **Feature Name** – The feature title matches the heading found in the Release Notes (this document). For more information on the feature, locate the feature via the table of contents. The features are listed in the order presented in the document.

- **Functions Affected** – The major RMM system functions associated with the enhancement. Use this information to determine the roles in your organization that are impacted by the change. For example, if the change is for Receiving, only those users who are authorized/responsible for receiving operations will be affected by the change.

- **Integration Impact** - Indicates features that are likely to impact integration between RMM and other third-party systems used by your organization. Examples would be changes to RESTful services and other features developed expressly for integration.
  
  Note that Integrations differ by client. These release notes are intended only to highlight areas for attention and cannot highlight every possible integration impact. JAGGAER recommends clients exercise at least the basic functions of all of their RMM integrations in the test environment in preparation for an upgrade.

- **On by Default** – Indicates that the feature is enabled by default and no configuration is required.

- **Requires Setup** – Indicates that some client-enabled configuration is required. Client configuration typically involves setting standard configuration options or adding permissions to roles.

- **Contact JAGGAER** – Indicates that JAGGAER Customer Support must be contacted to enable the feature, and that typically enablement will require JAGGAER professional services and/or an additional license.
Feature Snapshot

The following table provides a summary of features available in RMM 19.1.0.

<table>
<thead>
<tr>
<th>Feature Name</th>
<th>Related Functional Areas</th>
<th>Integration Impact</th>
<th>On by Default</th>
<th>Requires Setup</th>
<th>Contact JAGGAER</th>
</tr>
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<tbody>
<tr>
<td>Request Item Search enhanced search criteria</td>
<td>Request Item Search</td>
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<tr>
<td>Request Item Search export of results</td>
<td>Request Item Search</td>
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<tr>
<td>Container Search by selection of materials</td>
<td>Material Search; Container Search</td>
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<tr>
<td>Container Search increase maximum number of containers returned</td>
<td>Container Search</td>
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<tr>
<td>Container Search enhanced export from result set</td>
<td>Container Search</td>
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<tr>
<td>Material Search increase maximum number of materials returned</td>
<td>Material Search</td>
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<tr>
<td>Project Maintenance migration from ERM Applet/Application</td>
<td>Administration</td>
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<tr>
<td>Cost Center and Cost Center Group import using Data Loader</td>
<td>Data Loader; Administration</td>
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<tr>
<td>Cost Center and Cost Center Group migration from ERM Applet/Application</td>
<td>Administration</td>
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<tr>
<td>Cost Center and Cost Center Group enhanced maintenance functionality for assignment to people</td>
<td>People Search; Administration</td>
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<tr>
<td>Cost Center and Cost Center Group Export</td>
<td>Administration</td>
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<tr>
<td>Data Loader migration from ERM Applet/Application</td>
<td>Data Loader</td>
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<tr>
<td>Feature Name</td>
<td>Related Functional Areas</td>
<td>Integration Impact</td>
<td>On by Default</td>
<td>Requires Setup</td>
<td>Contact JAGGAER</td>
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<tr>
<td>Data Loader ability to load and validate data in background</td>
<td>Data Loader</td>
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<tr>
<td>Inventory Reconciliation migration from ERM Applet/Application</td>
<td>Inventory Reconciliation</td>
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<tr>
<td>Inventory Reconciliation import data via data loader</td>
<td>Inventory Reconciliation, Data Loader</td>
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<td>Inventory Reconciliation Statistics and Report</td>
<td>Inventory Reconciliation</td>
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<tr>
<td>Manage Expiration Notifications migration from ERM Applet/Application</td>
<td>Containers; Health and Safety</td>
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<tr>
<td>Reports migration from ERM Applet/Application</td>
<td>Reporting</td>
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<tr>
<td>Reports job to delete old reports</td>
<td>Reporting</td>
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<tr>
<td>Scan Operations migration from ERM Applet/Application</td>
<td>Container Operations</td>
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<td>Scan Operations Kiosk</td>
<td>Container Operations</td>
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<tr>
<td>Source Search improvements in searching JAGGAER hosted catalogs</td>
<td>Source Search</td>
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<tr>
<td>Source Search improvements in flagging/filtering preferred items in internal channels</td>
<td>Source Search</td>
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<tr>
<td>Supplier Maintenance migration from ERM Applet/Application</td>
<td>Administration</td>
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<tr>
<td>Scan Sheet printing migration from ERM Applet/Application</td>
<td>Container Operations</td>
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<tr>
<td>Employee Scan Sheet printing migration from ERM Applet/Application</td>
<td>Container Operations</td>
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</tr>
<tr>
<td>Feature Name</td>
<td>Related Functional Areas</td>
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<tr>
<td>Import Lists from 3E Optimize (formerly Ariel Data Manager) migration from ERM Applet/Application</td>
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</table>

**Retirement of ERM’s Java User Interface**

The RMM 19.1.0 release marks the completion of the retirement of ERM’s Java Applet/Application user interface, which was used in the “ERM Operations” component in prior releases. As of this release, all RMM application capabilities can be accessed without the requirement for a Java Runtime Environment (JRE) running in a browser or on the workstation.

In conjunction with this milestone, in addition to retiring the “ERM Operations” application component, JAGGAER is also retiring the term “ERM Researcher”, which was used in prior RMM 9 releases to distinguish capabilities migrated to the new HTML user interface.

Going forward, the application component previously named “ERM Researcher” will now be referred to simply as **RMM**.
Enhanced Search and Query Capabilities

The features listed in this section pertain to enhancements to search and query capabilities for Request Items, Containers, and Materials.

Enhanced Request Item Search

Request item search has been enhanced to support its ability to be used for ad-hoc queries. The maximum number of request items that may be returned has been increased from 300 to 50,000, the number of search criteria has been significantly expanded, and the request number has been added to the result set. A new result set export feature returns additional supplementary columns to facilitate reporting and analysis.

USER IMPACT

This feature is intended for use by: Lab Administrators, Researchers and Purchasing Reviewers

Accessed Via: Searching and Shopping / Request Item Search menu item

Permission(s) required: “Request Items Search All” or “Request Items Search My”

Enhanced Request Item Search Criteria

Request Item Search now has two Criteria panels: Lookup and Advanced Search

- **Lookup** is a single field search using Cart Name, Request Number, or PO number to quickly access specific items.

- **Advanced Search** criteria enables ad hoc query by User, Deliver-to Location, Submit Date, Product Name, Supplier/Brand, Catalog Nbr/Mfr Part Nbr, Structure Identifier, Cost Center, Status(es), Request Type(s) and up to three (total) request and/or request item flexible fields.
Notes on advanced search criteria:

- All criteria are “anded” together. Example: If the user specifies a Date Submitted range (from/to) and a supplier, the search will look for any request items submitted in the specified range for that supplier.
- The user criterion searches the request’s creator, requestor, or recipient fields.
- Multiple request item types may be specified. Type values are “or” together, as are Status values, and are “anded” with other criteria. Example: if the user specifies type values of “Hosted Catalogs” and “eMolecules”, Status values of “Received Full” and “Received Partial” and also specifies a date range, the search will look for any items that are: of Type (“Hosted Catalogs” OR “eMolecules”) AND of Status (“Received Full” OR “Received Partial”) AND were submitted within the specified date range.
- Flex fields are “anded” together. Example: if the user specifies “Flex Field A” with value of “A1” and “Flex Field B” with a value of “B2”, the search will look for any item that has “Flex Field A” with a value of “A1” AND “Flex Field B” with a value of “B2”.
Request Item Search Result Export

The results found in the request item search may now be exported. In addition to the fields directly displayed in the search result set, the new Request Item Search Result Export feature returns additional data columns to facilitate ad hoc query and reporting applications. The entire exported search result data set includes the following fields:

- Recipient
- Creator
- Requestor
- Request Type
- Shopping Cart
- Request #
- Request Item Line #
- Request Item Status
- Request Status
- PO #
- PO Line #
- PO Assigned Date
- Request Date
- Date Received
- Product Name
- Supplier
- Catalog #
- Brand
- Manufacturer Part #
- DUNS #
- Qty Ordered
- Qty Received
- Package Qty
- Package Unit
- Lot Size
- Box Unit
- Price
- Currency
- Extended Price
- Original Package Qty
- Original Package Unit
- Original Lot Size
- Delivery Site
• Delivery Building
• Delivery Floor
• Delivery Room
• Delivery Sub-location
• Receiving Room
• Organization
• Cost Center
• CAS #
• Structure ID
• UNSPSC #
• Radioactive
• Controlled
• Toxin
• Select Agent
• Hazardous
• EHS Restricted
• New Material
• Limit Exceeded
• Project
• Reserved
• All Request Line Item Flex Fields
• All Request Header Flex Fields - denoted by “(H)” in field title
Enhanced Container Search

Container Search has been enhanced for use in ad hoc query applications. The maximum number of containers that may be returned in a search has been increased from 20,000 to 50,000. Searching containers by a selection of materials is now supported. Container Search result set export returns additional supplementary columns to facilitate reporting and analysis.

USER IMPACT

This feature is intended for use by: Lab Administrator; Health and Safety Officer; Researcher;

Accessed Via: Container Operations / Container Search and Material Search menu options, respectively

Permission(s) required: “Container Search” and “Materials Search”

Container Search by Selection of Materials

From the container search page, the user can now search for containers by a selection of materials. The user builds a list of materials for which to find containers by the following process:

- Search for materials via the material search page.
- From the Material Search Result set, the user can select one or more materials, and can then “Send Materials to Container Search” (pictured immediately below).
- The user can perform a search for other materials, and can again “Send Materials to Container Search”. The new materials will be added to the materials sent previously. The user can repeat this process until the list includes all the materials for which to find containers.

Send Materials to Container Search – Material Search
• When the list of materials is complete, the user proceeds to the Container Search page, Advanced Search tab.
• From there, the user can combine the list of selected materials with other criteria to perform an ad hoc query.

For example, to report on materials with a specific GHS hazard in a given lab, the user could:
• On the material search page, search for materials with the given GHS hazard, select the materials from the results, and “Send Materials to Container Search”, and
• On the container search page, combine the list of materials with location

In the above picture, the user has specified to search “Lab2” for a list of “6 Materials” that were selected from Material Search.

An information button to the right of the “Materials” criteria allows the user to open a new tab displaying all of the materials that were “sent” from the Material Search page.

The user can clear the materials from the search criteria, by clicking on the trash can icon to the right of the “Materials” criteria.
Enhanced Export from Container Search Result Set

In addition to the fields directly displayed in the Container Search result set, the new Container Search Result Export feature exports additional data columns to facilitate ad hoc query and reporting applications. Following are all the fields that are exported.

- Bar Code
- Status
- Current Amt and Current Amt Units (two separate fields)
- Current Standardized Amount
- Tare Weight
- Owner
- Common Name
- Room Type
- Site
- Building
- Floor
- Room
- Sub-location
- Brand
- Manufacturer Part #
- Supplier
- Catalog #
- Original Amt and Original Amt Units (two separate fields)
- Original Standardized Amount
- Purity
- Storage Code
- GHS Signal Word
- Label Name
- MDL #
- CAS #
- Created Date
- Disposed Date
- Room Acquired Date
- Expiration Date
- Last Inventoried Date
- Site Acquired
- Lot #
- Organization
- Customer Compound ID
- Radioactive
- Controlled
- Select Agent
- Toxin
- Hazardous
- Restricted
- Project
- Reserved For
- Flex Fields
Material Search

The number of rows that may be returned via Material Search has been increased from 20,000 rows to 50,000 rows.

Improved Source Search for JAGGAER Hosted Catalogs

In order to enhance the accuracy and specificity of JAGGAER hosted catalog searching, specifically for chemistry research users, Source Search now makes the following adjustments specific to JAGGAER hosted catalog search using text criteria.

When the user-entered text string is recognized as a CAS number, RMM will automatically perform the search as a CAS number, instead of a text string. This change will, for example, avoid inadvertently returning an item whose catalog number happens to match a CAS number.

When a string other than a CAS number is entered:

- RMM will attempt to match the entered text to one or more existing materials within RMM
  - This is an exact match and does NOT use wildcard characters
- RMM will then search JAGGAER catalogs using the primary CAS number of the materials matched in the first step.
- If ten or less CAS numbers are matched, RMM will search the JAGGAER Hosted Catalogs using those CAS numbers instead of searching by the entered text.
- If more than ten CAS numbers are matched, RMM will search the catalogs using the entered text.

This change is expected to improve source search results in several ways.

- It will improve searching by synonyms, for example THF for Tetrahydrofuran.
- It will reduce or eliminate certain unwanted search results – for example returning other chemicals in THF solution when THF is wanted.
- It can also improve catalog searching using IUPAC names that include numbers and punctuation (parentheses, commas, etc) which a search engine may use as token separators.

Note that JAGGAER expects this feature will be particularly effective for clients who have used a third-party data source, like the Sigma Aldrich CSRD, or 3E Protect to create and maintain material profiles. Clients who have had RMM integrated with Biovia Available Chemicals Directory (ACD) over a long period of time should also see improvements.

Enhancements for Source Search of Internal Channels

Internal Source Search results (Labs, Storerooms and Stockrooms) have been enhanced to show additional container and location information. Each container in a lab and/or storeroom source search result will display the full container location as well as the current container owner. Each item in the stockroom source search result will display the full path of the item’s primary location.
The user can now filter labs, storerooms and stockrooms search results by items in preferred search locations. For each channel type (labs, storerooms and stockrooms), an item that is within one of the preferred locations set by the user (via the Preferred Search Locations page) will be identified with a Preferred badge in the result.

Migration of Major Functional Capabilities

Container Scan Operations

Previous versions of ERM Operations supported the Scan Operations window, which allowed users to perform container operations via a wedge scanner and container operations worksheet. In this release, this functionality has been enhanced with the introduction of a single-user can operations page within RMM, and a standalone Scan Operations Kiosk which may be used by multiple users.

Single-User Scan Operations

USER IMPACT

This feature is intended for use by: Lab Administrators and Researchers

Accessed Via: Container Operations / Scan Operations menu item

Permission(s) required: “Container Scan Operations”

A new page (pictured below) is available within RMM that allows the logged in user to perform scan operations by simply scanning container bar codes and information from a Container Operations Worksheet.

- Supported operations include: Check In, Dispose/Dispose Empty and Borrow/Return
- Scanning is simplified: Checking into a sub-location no longer requires separately scanning the room (only the sub-location is needed) New in this release
- The logged in user is always associated with the transaction, so it is generally not necessary to scan a person to perform a transaction
Notes on the Single-User Scan Operations page:

- The **Scan** field is used to provide all data (function, location, user)

**Scanned Operations:**

- **Check In**
  - The Scan Operations page opens defaulted to Check In
  - **To Location** will default to the primary location of the logged in user and may be changed by scanning another location
  - **To Owner** will default to the logged in user and may be changed by scanning another user ID. If a user ID is scanned, the **To Location** will change to the primary location of the scanned user. This user will become the owner of the container.

- **Dispose / Dispose Empty**
  - Location and User scans are not accepted for these operations

- **Borrow**
  - **To Location** will default to the primary location of the logged in user unless another location is scanned
  - **User** scan is not accepted for this operation

- **Return**
  - Location and User scans are not accepted for this operation

Scanning ‘**Done**’ on the Container Operations Worksheet performs the scanned operation on the containers and returns the Scan Operations page to its default state (Function = Check In, To Location = logged in user’s primary location, To Owner = logged in user).

Scanning ‘**Clear**’ on the Container Operations Worksheet clears all of the scanned containers and returns the Scan Operations page to its default state.
Scan Operations Kiosk

**USER IMPACT**

**This feature is intended for use by:** Lab Administrators and Researchers

**Accessed Via:** Stand-alone Scan Operations Kiosk

**Permission(s) required:**

- “Container Operations Scan Kiosk” (This will allow a person to start the Scan Operations Kiosk)

For lab or storeroom operations where a single scanning station will be shared by multiple users, RMM 19.1.0 introduces a **new** Scan Operations Kiosk for container scan operations (pictured below). In the Kiosk, multiple different users identify themselves by scan and transactions are recorded as having been performed by the scanned user.

Scanned Operations:

- **Check In**
  - The Scan Operations Kiosk opens defaulted to Check In
  - **To Location** must be provided. To Location will default to the primary location of the scanned **To Owner**. If a different location is desired, this **must** be scanned **after** scanning **To Owner**
  - **To Owner** must be provided. When a user ID is scanned:
    - **To Location** will change to the primary location of the scanned user
• **Initiated by** will change to the scanned user

- **Dispose / Dispose Empty**
  - **Initiated by** must be provided by scanning a user ID
  - Location scans are not accepted for these operations

- **Borrow**
  - **Initiated by** must be provided by scanning a user ID
  - **To Location** must be provided by scanning a Location ID

- **Return**
  - **Initiated by** must be provided by scanning a user ID
  - Location scans are not accepted for this operation

Scanning ‘**Done**’ on the Container Operations Worksheet performs the scanned operation on the containers and returns the Scan Operations page to its default state (Function = Check In).

Scanning ‘**Clear**’ on the Container Operations Worksheet clears all of the scanned containers and returns the Scan Operations Kiosk page to its default state.
Inventory Reconciliation

USER IMPACT

This feature is intended for use by: System Administrators, Storeroom Administrators or Lab Administrators

Accessed Via: Inventory Services / Inventory Reconciliation menu item

Permission(s) required: “Inventory Reconciliation”

The RMM 19.1.0 release completes the migration of ERM’s Inventory Reconciliation capabilities to the new user interface. New capabilities for this release include the ability to:

- Upload reconciliation data captured from sources other than the RMM mobile computer (hand-held scanner) application, and
- Provide corrections for any field in the scanned reconciliation data transactions, and upload all corrections

The RMM mobile computer application for collecting Inventory Reconciliation data has not changed in this release; no updates to RMM mobile computer software are required.

Notes on the Inventory Reconciliation result set:

- The displayed results are subject to the user’s All Sites / My Sites preference
- The following result set columns are displayed: Location, # Containers Scanned, # Containers Expected (i.e. the number of containers RMM has recorded as being in the scanned location)
- The result set is sorted by site, building, floor, and room (and sub-location, if Reconciliation Level = Sub-Location)
**ACTIONS**

- **Reconciliation Level:** The user specifies whether the reconciliation will be at the room or sub-location level.
  - **Room:** All room locations for which inventory reconciliation data is pending processing are displayed
    - Note that, for room level reconciliation, containers scanned at the sub-location level will be counted in the room corresponding to the sub-location
  - **Sub-Location:** sub-locations for which inventory reconciliation data is pending processing are displayed

- **Full / Partial Options:**
  - Process all containers (Scanned and Unscanned) = Full Reconciliation
  - Process ONLY scanned containers = Partial Reconciliation

- **Change owner of scanned containers to scanned user**
  - If this option is selected, the owner for all containers will be changed during reconciliation to the user who collected the scan data; if not selected, container owner will not change

- **Export Reconciliation Data:**
  - Exports a CSV file of all the containers that will be processed during reconciliation.
    - For a Full Reconciliation, this will include **all containers, scanned and unscanned**, for the selected locations.
    - For a Partial Reconciliation, this will include only the scanned containers.
  - The Export Reconciliation Data creates an export of exactly what is going to occur during the reconciliation
  - The columns in the export file are: Scanned Site, Scanned Building, Scanned Floor, Scanned Room, Scanned Sub-location, Bar Code, Label Name, Scanned User, **Reconciliation Status**, System Site, System Building, System Floor, System Room, System Sub-location, Owner, Inventory Date, Status
    - Reconciliation Status will be one of the following: Matched, Mismatched, Not Scanned, Not in System, Disposed, Moved after Upload, and Disposed After Upload.

- **Reconcile Locations:** Opens the **Summary of Inventory Reconciliation** (pictured below). This summary provides an overview of the reconciliation options selected and the status of all of the containers which will be impacted by performing the reconciliation. The user can either run the reconciliation or close the summary to return to the main Inventory Reconciliation page.
Reconciliation occurs in the background, freeing the user’s workstation to perform other tasks. The user who initiated the reconciliation will not be able to start another inventory reconciliation until the current process has completed. After the reconciliation process has started the Inventory Reconciliation page will appear as pictured below:

Once completed, the user who initiated the reconciliation will receive an “Inventory Reconciliation Completed” notification (pictured below).
New Data Loader Types for Inventory Reconciliation Data

**Permission(s) required:** “Data Loader Load Page” and “Data Loader Load Inventory Reconciliation”

The Data Loader now supports two new data load types that allow the loading of inventory reconciliation data. These types support two major use cases:

- Acquisition of data from other sources: labs can use external applications and devices to create inventory reconciliation files and then use the Data Loader to upload the files for reconciliation as if they had been collected on the RMM mobile computer (hand-held scanner) application.
- Error correction: Prior to processing reconciliation data, a user can export and review the scanned transactions, make any required corrections (to any data field) and then re-import the data for processing. When scanned / uploaded data is exported from Inventory Reconciliation, any validation issues encountered are included with the data, to facilitate identification and correction of rows with issues.

The Data Loader will accept Inventory Reconciliation data in two file types, Standard Text Format and Scanned Data Format.

**Standard Text Format**

The fields associated with the new, standard text load type are as follows. All fields are required except for sub-location.

- **User Id:** Must match an existing RMM user ID
- **Bar Code:** Does not need to match an existing container bar code
- **Container Site:** Must match an RMM site
- **Container Building:** Must match a building at the provided site
- **Container Floor:** Must match a floor at the provided building
- **Container Room:** Must match a room at the provided building
- **Container Sub-location:** See Note below

The sub-location:

- Must match a sub-location within the provided room
- Must use the ‘>’ delimiter (Ex: Aisle 1>Rack 2>Shelf 4>Bin)
Scanned Data Format

An additional format, the Scanned Data Format, is what is generated via scanning the RMM container bar codes and bar codes from the Container Operations Worksheet. The data format has three fields - location, user, and bar code. All fields are required for the Scanned Data Format.

- **Location:**
  - Value as obtained from scanning a location from Container Operations Worksheet or sub-location labels. (Note: these values are either ‘LP%Qnnnn’, where nnnn is an RMM internal roomid, or ‘S.nnnn’ where nnnn is an RMM internal sub-location ID.)
  - If inventorying containers are at the sub-location level, you only need to scan the sub-location ID.

- **User:** value as obtained from scanning a user from either Container Operations Worksheet or employee labels. (Note: these values are in the format ‘UP%Qnnnn’ where nnnn is an RMM internal user id)

- **Bar Code:** The bar code value is not preceded by a scan code. All file entries without a prefix are assumed to be container bar codes

Notes on Both Scan Formats

The inventory reconciliation date for the transactions is when the data is loaded via the data loader.

Each time Inventory Reconciliation data for a location is loaded via the Data Loader, the data is added to any existing inventory records for the location. If an inventory reconciliation date for Lab 1 was loaded yesterday and then additional data for Lab 1 is loaded today, the inventory records would consist of both yesterday’s and today’s data. Previously loaded inventory data is not replaced when new inventory data for a location is loaded.

If multiple pending reconciliation records are uploaded for the same container bar code, the last occurring record for the container bar code will be the only record used for reconciliation.
Inventory Reconciliation Statistics and Report

Whenever a full inventory reconciliation is performed at the room level, RMM will save the statistics reported immediately prior to processing the reconciliation. These statistics include, for example, containers transferred, and containers expected but not scanned. A new report is provided for displaying these statistics. The report is accessible from the new "Schedule/Run Report" page.

The columns in the report are as follows

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reconciliation Date/</td>
<td>The date and time the reconciliation event occurred. Displayed in requesting</td>
</tr>
<tr>
<td>Time</td>
<td>requesting user's time zone.</td>
</tr>
<tr>
<td>Site</td>
<td>Site of reconciled room.</td>
</tr>
<tr>
<td>Building</td>
<td>Building of reconciled room.</td>
</tr>
<tr>
<td>Floor</td>
<td>Floor of reconciled room.</td>
</tr>
<tr>
<td>Room</td>
<td>Reconciled room.</td>
</tr>
<tr>
<td>User</td>
<td>Person who reconciled the data.</td>
</tr>
<tr>
<td>Total Containers</td>
<td>The total number of containers affected by this reconciliation event</td>
</tr>
<tr>
<td>Matched</td>
<td>The count of containers confirmed in their expected location.</td>
</tr>
<tr>
<td>Mismatched</td>
<td>The count of containers scanned to a different location than expected.</td>
</tr>
<tr>
<td>Not Scanned</td>
<td>The count of containers expected in room that were not scanned.</td>
</tr>
<tr>
<td>Not in System</td>
<td>The count of unrecognized container bar codes.</td>
</tr>
<tr>
<td>Disposed</td>
<td>The count of disposed containers returned to inventory by reconciliation.</td>
</tr>
<tr>
<td>Moved after Scan</td>
<td>The count of inventory records not processed because the container had a</td>
</tr>
<tr>
<td></td>
<td>TRANSFER history record after the count date.</td>
</tr>
<tr>
<td>Disposed after Scan</td>
<td>The count of inventory records not processed because the container had a</td>
</tr>
<tr>
<td></td>
<td>DISPOSE history record after the count date.</td>
</tr>
</tbody>
</table>

Example

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reconciliation Statistics</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Report Date: 10-JUN-2019 12:02:25 pm</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Site: All</td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Reporting Period: All Dates</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Report Generated by: Tara Novak</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reconciliation Date/Time</td>
<td>Site</td>
<td>Building</td>
<td>Floor</td>
<td>Room</td>
<td>User</td>
<td>Total Containers</td>
<td>Matched</td>
<td>Mismatched</td>
<td>Not Scanned</td>
<td>Not in System</td>
<td>Disposed</td>
<td>Moved after Scan</td>
<td>Disposed after Scan</td>
</tr>
<tr>
<td>6/7/2019 14:17 Bermuda</td>
<td>Building 1</td>
<td>Bermuda</td>
<td>Tara Nova</td>
<td>295</td>
<td>22</td>
<td>2</td>
<td>209</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

End of Report
**Data Loader**

**USER IMPACT**

**This feature is intended for use by:** System Administrators, Lab Administrators

**Accessed Via:** Administrator Settings / Data Loader menu item

**Permission(s) required:** “Data Loader Load Page” This permission will allows the user to access the Data Loader page; however separate permissions are needed to load each load type

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**Data Loader**

The RMM 19.1.0 release completes the migration of ERM’s Data Loader capabilities to the new user interface. The new Data Loader supports all functional capabilities of prior releases. In addition the following **new** capabilities for this release include:

- After the data is loaded, RMM will automatically validate the data.
- Validation of the data, as well as applying the data to the database, is done in the background, so the user may perform other tasks while the data is being validated and/or applied.
- The following new data load types are now supported: Cost Centers, Cost Center Groups and Inventory Reconciliation Data. The file formats for these new data load types are detailed elsewhere in this document.

Note that the **maximum size** of a file that may be loaded via the Data Loader is **10mb**.
ACTIONS

- **Data Load Type:** The user specifies the type of data to be loaded. A Data Load Type is only displayed for a user with the necessary permission. Please see the appendix for permission needed for each data load type.

- **Export Template For**
  - **All Fields:** Exports a CSV template containing all fields for the selected Data Load type
  - **Only Required Fields:** Exports a CSV template containing only the required fields for the selected Data Load type. For Containers and Stockroom Container load types with required flexible fields, the required flexible fields will be included in the Required Fields template

- **Apply:** Load the imported records into the RMM database. This will update the status in the Summary section to Applying/Applied and also update the Start and End times.

- **Export File:** Export the currently loaded file. In addition to the data fields, each record in the exported file will include the following two fields:
  - **Status** – status of the row. Status could be one of the following:
    - Valid – row has no errors.
    - Error – there was an error either during validating or applying. Information on the error is provided in the message column.
    - Loaded – row has been applied to the database.
  - **Message** – if the row is in error, this column will contain the error message.

- **Revalidate:** File errors can sometimes be corrected by updating existing RMM data (e.g. assigning a container to a sub-location which has not been created in RMM). Revalidate allows the user to revalidate the data in the file after other RMM data has been updated (in this case, by creating a container sub-location via the Manage Sub-Locations page).

- **Clear Imported Data:** This will delete all of the data that has was most recently imported by the logged in user. A user can have data for only one Data Load Type imported at any given time. Note that once data has been applied to the RMM database, clearing import data will NOT remove the applied data from RMM.

- **Import File:**
  - **Browse:** Allows the user to navigate their computer to and select the Data Load file to be processed
  - **Delimiter:** The field separator used in the selected file (comma, semi-colon, tab)
  - **Import:** Imports the selected file. File details are displayed in the Summary section. When a file is imported, it is automatically validated. After importing the file, the user must refresh the page to view status of the import.
• **Summary:**
  - **Type:** Data Load Type selected
  - **Status:**
    - Validating
    - Validated
    - Applying
    - Applied
  - **Start:** Time that the current process (validating, applying) began
  - **End:** Time that the current process completed. This field will only be displayed for files that have a status of Validated or Applied
  - **File Name:** Name of the CSV file being loaded
  - **File Imported:** Date and time that file was imported
  - **Rows In File:** Number of rows in the imported file
  - **Rows with Errors:** Number of rows with errors in the imported file
New Data Loader Types

The following new data load types are now supported.
- Inventory Reconciliation – please read the inventory reconciliation section for details
- Cost Center and Cost Center Group – please read the cost center section for details

Enhancements to Existing Data Loader Types

Enhancements have been made to the following Data Loader types

<table>
<thead>
<tr>
<th>Data Loader Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| People           | Now supports “Active” flag which indicates if person is active. 
|                  | Valid Values 
|                  | “Y” – person is an active user. Default is ”Y” 
|                  | “N” – person is not an active user. |
Reports

USER IMPACT

This feature is intended for use by: All Users

Accessed Via: Reports menu items

Permission(s) required: No permission is required for a user to view their own reports and report jobs. The "Reports View All Reports and Report Jobs" permission is needed to view reports and report jobs of all users. The "Reports Manage Delete Reports Job" permission is needed to access the page which manages the job to delete old reports.

In RMM 19.1.0, the RMM reporting architecture is migrated to ERM’s new user interface, retaining the ability for clients to modify existing reports, create new reports, check status of submitted reports, and schedule reports for automated execution and delivery.

Report functionality consists of the following pages:

- **Schedule/Run Reports** – allows a user to select a report to run. A user may specify a report to be run immediately, at some future date and time, or on a recurring basis (such as weekly).
- **My Reports** – allows a user to view the reports that have been run.
- **View Scheduled Reports** – allows a user to view reports that are scheduled to run.
- **Manage Reports – New in RMM 19.1.0.** Allows a user to manage the job that deletes old reports.

Existing RMM product reports from prior versions will generally continue to be supported. Client custom reports that are compatible with ERM 9.4 are also expected to be able to run under the migrated reporting architecture in RMM 19.1.0. The RMM 19.1 report architecture does not support printing chemical structures on reports.

The following reports have been removed from RMM and are no longer supported: a) Purchases and Purchase Avoidance with Chart and b) Inventory Report by Room. The Container Expiration Alert report has been replaced with the Manage Expiration Notifications page. Please read the Manage Expiration Notifications page for more information.
Schedule/Run Report

USER IMPACT

This feature is intended for use by: All Users

Accessed Via: Reports / Schedule/Run Reports menu item

Permission(s) required: Individual reports may be assigned a role (via the System Administration Module) in which case, the user must either be assigned to the same role or have the “Reports View All Reports and Report Jobs” permission. By default, none of the product reports are assigned to roles, and are thus accessible by all users.

The Schedule/Run Report displays all RMM reports and allows the user to select a report to run. For each report, the user specifies report criteria as well as if the report should be run immediately, sometime in the future or on a recurring basis. Following shows some of the reports found on the Schedule/Run Report page.

The reports have an icon which denotes whether the report is CSV only, PDF only or can be generated in either format. After selecting a report, the report criteria page opens (detailed below).
The criteria page for each report consists of two sections: run criteria (pictured below) and report criteria. The run criteria is the same for every report and allows the user to specify when the report should be run, output type of report, and if the report should be sent via email.

ACTIONS FOR RUN CRITERIA

- **Job Name**: Name of job. The name will appear in emails (if emails are selected) as well as the “My Reports” and “Scheduled Reports” pages.
- **Output Type**: Select CSV or PDF. Defaults to “CSV”. Some reports are only available in CSV output.
- **Emails**: The user can provide e-mail addresses that will receive the report. If multiple e-mail addresses are provided they should be separated by semi-colons. Two additional option are provided for e-mailed reports:
  - **Send email even if report is empty** – only applies if email recipients have been specified. If this is checked, emails containing the report will be sent to recipients even if the report is empty.
  - **Save report after email sent – New in RMM 19.1.0**. Only applies if email recipients have been specified. If this is checked, the report will be saved and viewable via the My Reports page after the email has been sent. If unchecked, the report will not be viewable on the My Reports page.
- **Now**: report will be run immediately after choosing criteria and selecting “Submit Now”
- **Later**: user selects a future date and time at which the report will run.
- **Day of Week**: allows user to schedule the report to run on a recurring basis by specifying the following:
  - Day(s) of the week when the report should be run
  - Start time on which the report should run on the selected days
  - Frequency that the report should run (**Run Every n Minutes**)
o Stop time on which the report will stop running if frequency is specified. Stop time will only be specified if frequency is specified.

- **Day of Month**: The user selects:
  o Start Time
  o Day of the month (First through Fifth) plus day (Sunday through Saturday) that the report should be run (i.e. Second Monday)

- **Day of Quarter**: user selects:
  o Start Time
  o Day of the quarter (Sunday through Saturday) that the report should be run

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**ACTIONS FOR REPORT CRITERIA**

Report criteria differ from report to report. Examples of report criteria: material name, regulatory list name(s), or lab location.
My Reports

USER IMPACT

This feature is intended for use by:  All Users

Accessed Via:  Reports / My Reports menu item

Permission(s) required:  No permission required to view user’s own reports.  Reports “View All Reports and Report Jobs” permission required to view reports of all users.

The “My Reports” page allows users to view the status of reports they have submitted and to access completed reports.  If the user has the “View All Reports and Report Jobs” permission the user can see reports from all users.

Note that if a report has been sent to recipients via email, and if the “Save report after email sent” run criteria has not been selected, the report will not appear on this page.

My Reports page

Notes on the My Reports result set:

- A maximum of 300 reports will be returned in the result set.
- The result set is initially sorted by the most recent Start Date.  The result set can be sorted by clicking on a column header.
- The result set columns displayed are: Title, Job Name, Status, Start Date, Completed Date, Format, Error Message, Submitter, Job ID, Run ID, Automatically Deleted On
  - The “Automatically Deleted On” date is the date on which the report will be deleted.  
    **New in RMM 19.1.0.**  The “Automatically Deleted On” date is based on the “Delete Reports Older Than” value set on the Manage Reports page.  Please read the Manage Reports section later in this document for more information.
ACTIONS

- **Filter By**: The user specifies the reports to be displayed:
  - **All Reports**: New in RMM 19.1.0 This option is only available to users with the “Reports View All Reports and Report Jobs” permission and allows users to view reports submitted by all users.
  - **Date Range**: New in RMM 19.1.0 This filter returns reports the logged in user submitted within the specified date range. If the user has the “Reports View All Reports and Report Jobs” permission, this filter will return reports submitted by any user within the specified date range.
  - **My Reports**: New in RMM 19.1.0 The default filter option, the My Reports page initially opens displaying the reports submitted by the logged in user.
  - **Status**: The user can filter the reports by the following statuses: Success, Fail, Generating. The filter will return reports the logged in user submitted that matches the selected status. If the user has the “Reports View All Reports and Report Jobs” permission, this filter will return reports with the selected status that were submitted by any user.
  - **Title**: New in RMM 19.1.0 Returns all reports with the given title submitted by the logged in user. If the user has the “Reports View All Reports and Report Jobs” permission, this filter will return reports submitted by any user that matches the selected title.

- **Delete Selected**: A multi-row action. Deletes all reports in the result set which have been selected by the user. A warning message will display prior to deleting the report(s).

- **Delete**: A single-row action. Will delete the selected report. A warning message will display prior to deleting the report.

- **Download Report**: Downloads the report in the format in which it was generated (CSV or PDF).
View Scheduled Reports

USER IMPACT

This feature is intended for use by: All Users

Accessed Via: Reports / View Scheduled Reports menu item

Permission(s) required: No permission required to access reports that the user has scheduled. The “Reports View All Reports and Report Jobs” permission is required to view reports scheduled by all users.

The “View Scheduled Reports” page allows users to view reports they have scheduled. If the user has the “View All Reports and Report Jobs” permission the user can see all scheduled reports.

Notes on the View Scheduled Reports result set:

- The result set columns displayed are: Report Name, Job Name, Creator, Job Created Date, Schedule Status, Frequency, Last Run, Next Run, Last Run Report Status, Email Address, Delete After Emailed, Last Run ID, Job ID
- The result set is initially sorted by Report Name. The result set can be sorted by clicking on a column header

ACTIONS

- **Delete Job:** Will delete the selected report job. A warning message will display prior to deleting the report job.
- **View Job Criteria:** Opens a pop-up displaying the report criteria initially selected when executing the report.
- **Stop Job:** Stops future executions of the scheduled job. The Schedule Status is updated to Stopped. The report is not deleted and can be resumed.
- **Resume Job:** Resumes future executions of the scheduled job. The schedule status is updated to “Scheduled”.
- **Run Job Now:** Immediately runs the scheduled job. This does not affect any scheduled future executions of the report.
Manage Reports

USER IMPACT

**This feature is intended for use by:** System Administrators

**Accessed Via:** Reports / Manage Reports menu item

**Permission(s) required:** “Reports Manage Delete Reports Job”

**New to this release**, RMM 19.1.0 introduces automated deletion of reports that have reached a certain age. Automated deletion of reports occurs daily. An authorized user can set the age of reports to be deleted and the time of day at which the deletion job runs. An authorized user can also direct the deletion job to “run now”.

Following are functional details of the delete report job:

- Runs every day at a time selected by the system administrator
- The system administrator specifies an age, in days, after which a report will be deleted
- The job deletes reports that have an expiration date before the date on which the delete job runs.

  Expiration Date of Report = start date of report + delete age

  Example: if a report start date is 1-Mar-2019, and the age is 90 days the expiration date is 31-May-2019. When the report job is run on 31-May-2019, the report will not be deleted. When the report job runs on 1-Jun-2019, the report will be deleted.

- The Delete Reports job will delete stockroom pick slip reports
- Reports that are attached to notifications will **not** be deleted
Manage Reports

**ACTIONS**

- **Save Settings**: Saves the delete job settings.
- **Run Delete Reports Job Now**: Immediately runs the delete job.
- **Delete Report Job is On/Off**: Turns the job on or off. If the job is turned on, the job will run at the next scheduled time. Note that when the job is turned on, it runs every day at the scheduled time. When the job is off, the job will not run automatically.
- **Total Existing Reports**: Number of reports in the system.
- **Number of reports older than n days**: Number of reports that would be deleted if the delete report job runs now. Note that on the “My Reports” page, the user can see on what date a given report will be deleted.
- **Delete Reports Older Than [N] days**: This sets the age of the reports to be deleted. This age applies across all reports. The maximum value is 365.
- **Run daily at**: Time of day at which the delete report job will run.

**Note on Currently Existing Reports and Expiration Date**

When a client is upgraded to RMM 19.1.0, the expiration date of reports that were created before the upgrade is:

\[
\text{expiration date} = \text{upgrade date} + \text{Delete Age}
\]

The expiration date of reports created after the upgrade is

\[
\text{expiration date} = \text{start date of report} + \text{Delete Age}
\]

Example: a client is upgraded on 15-Jul-2019, and the system administrator sets the age to be 365 days. The client already has 100 reports created between January 2015 and June 2019. All those reports have the same expiration date of 15-Jul-2020. On 16-Jul-2019, a new report is created. That report has an expiration date of 16-Jul-2020.

For reports created before the upgrade date, the “Number of reports older than n days” reflects the number of reports to be deleted, not necessarily the age. Following on the above example, if on
15-Jul-2020, the administrator access the Delete Reports page, the “Number of reports older than n days” will show 0, even though there are 100 reports created between January 2015 and June 2019 – this is because no reports are to be deleted. If the user accesses the page on 16-Jul-2020 before the delete report job runs, the “Number of reports older than n days” will be 100.
Manage Expiration Notifications

USER IMPACT

This feature is intended for use by: System Administrators or Health and Safety Administrators

Accessed Via: Administrator Settings / Manage Expiration Notifications menu item

Permission(s) required: “Container Expiration Alert Notification Configuration”

In RMM 19.1.0, the Manage Expiration Notifications page allows an authorized user to configure and schedule a job to send automated container expiration notifications to personnel responsible for containers that are expired or nearing expiration. In prior releases, this configuration was performed via access to system properties, and the notifications were sent by scheduling the “Container Expiration Alert” report. This functionality has been migrated to the new Manage Expiration Notifications page, and the “Container Expiration Alert” report has been retired.

The Container Expiration Alert functionality has been enhanced as follows:

- **New in this release** Notifications can now be sent via line notifications, as well as emails (which could be done previously)
- Compared with previous releases, system administrators have greater latitude in configuring the content of the notification. The content of the expiration notification is configured via the Notification Content Configuration page. Previously, content was limited to what could be set via the Chem Preferences page in the System Administration module.

Important: While the system administrator may turn off the expiration job, if the notification job is running, individual users may NOT opt out of receiving expiration notifications.

![Container Expiration Alert Notification Configuration](image.png)
ACTIONS

- **Save**: Saves the notification settings.
- **Run Notifications Job**: Immediately runs the notification job
- **Container Expirations Are On/Off**: Turns the job on or off. If the job is turned on, the job will run at the next scheduled time.
- **Only send notifications for containers that will be expired in N days**: This configuration determines what containers are included in the notification. The value [N] is set by the administrator and may be any value between 0 and 365.

  When the expiration job is run, any container that has an expiration date that is on or before the job run date plus [N] days will be included in the notification.

  Example: assume job run date is 12-Jun and [N] is 30 days. When the job runs it will send out notifications for containers that have an expiration date on or before 12-Jul.

- **Send Notifications To**: Determines to whom the notifications are sent. Notifications may be sent to one of two types of recipients:
  - Owner of Container – the owner of the containers that are about to expire
  - Users in Container Room – any user whose primary room is in the same room as the containers that are about to expire.

- **Additional Emails**: In addition to the recipients specified in the “Send Notifications To” configuration, emails of other people, or groups, may be specified to receive the notifications. The emails specified do not have to be RMM users.
  - Additional email recipients receive a **consolidated notification**. For example, if notifications are sent by owner, each owner will receive an individual notification for their owned containers; however, additional email recipients will receive one email listing the relevant containers for **ALL** owners who have been notified.

- **Run on the Following Days At**: The job can be scheduled any day(s) of the week, at a time specified on the half hour – such as 12:00 am, 12:30 am, through 11:30 pm.

**Important Note:**

After the upgrade the notifications will **NOT** be scheduled to run. If you had previously scheduled the Container Expiration Alert report, you will need to reschedule the job via this page.
Migration of Administration Capabilities

RMM 19.1.0 completes the migration of the remaining administrative capabilities from the ERM Operations Module. The following sections detail the migrated capabilities.

Cost Center and Cost Center Group Management

USER IMPACT

This feature is intended for use by: Administrators or Lab Administrators

Accessed Via: People Administration / Manage Cost Centers, People Administration / Manage Cost Center Groups

Permission required: “Cost Center Manage Cost Centers”, “Cost Center Manage Cost Center Groups”

RMM 19.1.0 migrates Cost Center and Cost Center Group administration and provides helpful new features supporting common use cases. For example, if a researcher needs access to a particular cost center, it is now much more straightforward to determine what cost centers that user can already access as well as identifying a suitable cost center group and assigning it to that user.

Migration also provides new features for:

- Exporting Cost Centers and Cost Center Groups for query and reporting
- Importing Cost Centers and Cost Center Groups via the Data Loader
- Creating Cost Center Groups, editing Cost Center Group assignments and managing Cost Center Groups directly from the Edit People page
Manage Cost Centers

The Manage Cost Centers page (pictured below) allows users to search for and view cost centers and the cost center groups to which they are assigned. A user will also be able to activate and inactivate cost centers, and, new to this release, export all cost centers and cost center groups.

**ACTIONS**

- **Search**: Allows a user to enter criteria, including wildcards, to search for matching cost centers. The search will return a maximum of 300 cost centers. The returned results will be sorted alphabetically.
- **Activate Cost Centers**: Activates the selected cost centers
- **Inactivate Cost Centers**: Inactivates the selected cost centers and disassociates the cost centers from any assigned cost center groups
- **Export All Cost Centers**: Exports all cost centers to a CSV file
- **Export All Cost Centers and Groups**: Exports all cost centers and associated cost center groups to a CSV file
- **Click on Cost Centers**: Clicking on a cost center in the left table will list all cost center groups associated with the selected cost center, and displays the total number of cost centers for each listed cost center group.
Manage Cost Center Groups

The Manage Cost Center Groups page (pictured below) allows a user to search for and view cost center groups. A user will also be able to create cost center groups and create a new cost center for a cost center group.

A user needs the “Cost Center Manage Cost Center Group” permission to access this page.

All cost center groups which meet the provided search criteria are listed on the left-side of the page. A maximum of 300 results will be returned.

All cost centers currently assigned to the selected cost center group are listed on the right-side of the page.

**Actions**

- **Search**: Allows a user to enter characters, including wildcards, to search for cost center groups by name
- **Create New Cost Center Group**: Opens the Create Cost Center Group pop-up (pictured below) which allows the user to create a new cost center group as well as new cost centers.
- **Edit Cost Centers for Group** (icon): Opens the Edit Cost Centers For Group [name] page (detailed below) which allows the user to search for cost centers to add to the cost center group.
- **Remove Cost Center from Group** (icon): Deletes the selected cost center from the cost center group.
Create Cost Center Group

This popup is accessed via the Manage Cost Centers Group Page as well as the Edit Person Page. The popup allows a user to create a new cost center group and new cost center, or add an existing cost center to a new or existing cost center group.

CREATE COST CENTER GROUP

- **Cost Center Group**
  - Name of the new Cost Center Group
  - Required field
- **Cost Center**
  - Optional field

NOTES ON CREATING A COST CENTER GROUP

- The user enters the name of a cost center group and can optionally enter the name of a cost center
- The entered cost center group will be created if it does not already exist.
- If a cost center name has been entered, it will be assigned to the cost center group
- The entered cost center will be created if it does not already exist.
- If the cost center and group already exist and are already linked, they will continue to be linked; no changes will be made and no message will display
- Saving clears both fields and allows the user to continue entering data.
- If accessed from the Manage Cost Centers Group page, that page must be refreshed to display newly created Cost Center Groups and/or cost centers.
- If accessed from the Edit Person page, the new cost center group will be automatically be assigned to the user and displayed on the Edit Person page.

Edit Cost Centers for Group
The Edit Cost Centers for Group page is accessible via the Manage Cost Center Groups or Edit Person pages. This page allows a user to add a new or existing cost center to a group, remove existing cost centers from a group, or search for existing cost centers to add to the group.

**Edit Cost Center for Groups**

**ACTIONS**

- The page opens for one cost center group. All cost centers currently assigned to the cost center group are listed on the left side of the page. A maximum of 300 cost centers will be returned.
  - Clicking the [icon removes the cost center from the cost center group
- **Cost Center Add+:** Adds an entered cost center to the cost center group. The cost center will be created if it does not exist
- **Search For Cost Centers:** Allows a user to enter characters, including wildcards, to search for cost centers (maximum of 300 displayed) – from which to add to the group. All cost centers returned by Search For Cost Centers are listed on the right side of the page.
  - Cost centers that are already in the Cost Center Group are denoted by the [icon
  - Cost centers not in the cost center group will have the [icon. Clicking the icon will add the cost center to the cost center group.
  - Changes are saved automatically
- **Back to Manage Cost Center Groups or Back to Edit Person:** Depending on how this page was accessed, returns the user to either the Manage Cost Center Groups page or Edit Person page.
Edit Person and Cost Center Groups

Directly from the Edit Person page, a user can be assigned to new or existing cost center groups. (A snippet of the edit person page is pictured below).
To add an existing cost center group to a user, the administrator enters in the first few characters of the group name in the search group field. A list of groups that match the entered characters will appear. The user selects the group and clicks add. In the picture below the user has searched for the "Administration" group.

The View Cost Centers for Group icon will open a new tab displaying all of the cost centers assigned to the cost center group currently in the search cost center group field. In this example, it will display all the cost centers in the "Administration" Group.

The Create New Group icon opens the Create Cost Center Group popup (detailed previously) which allows a user to create a new group and associate new/existing cost centers. The newly created group will be assigned to the user.

The View All Cost Centers Assigned to the User icon will open a new tab displaying the cost center groups and their associated cost centers assigned to the user.

The trash can icon removes the group from the user.

The Edit Cost Center Group icon opens the Edit Cost Centers For Group page (detailed previously).
Loading Cost Center and Cost Center Group Via Data Loader

**Permission(s) required:** “Data Loader Load Cost Center and Cost Center Group” and “Data Loader Load Page”

**New with this release,** cost centers and cost center groups may now be loaded via the Data Loader. The fields associated with the new load type are as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Center</td>
<td>Y</td>
<td>If the cost center does not exist, it will be created. If the cost center exists, and the provided Active flag is ‘N’, the cost center will be deactivated and it will be removed from any Cost Center Group.</td>
</tr>
<tr>
<td>Cost Center Group</td>
<td>N</td>
<td>If the cost center group does not exist, it will be created. The provided cost center will be associated with the cost center group.</td>
</tr>
<tr>
<td>Active</td>
<td>N</td>
<td>This field can be either “Y”, “N” or blank. If not specified, defaults to “Y”. Active cannot be “N” if Cost Center Group is provided.</td>
</tr>
</tbody>
</table>
Project Maintenance

USER IMPACT

This feature is intended for use by: Administrators or Lab Administrators

Accessed Via: People Administration / Manage People Assigned to Projects

Permission required: “People Manage Projects and Assign People”

RMM 19.1.0 migrates all Project Maintenance functionality while improving upon and simplifying the process for creating and maintaining projects and managing the people assigned to projects.

- All Projects and the attributes for the Project are listed on the left-side of the page when the page is accessed. Click anywhere on a project to highlight it.
- All users currently assigned to the highlighted Project are listed on the right-side of the page

**ACTIONS**

- **Add Project:** Opens a pop-up to create a new Project
- **Search:** Allows a user to search for a person to assign to a Project
- **Add User to Project:** Adds the selected person to the highlighted Project
- **Remove User from Project:** Removes the selected Assigned User(s) from the highlighted Project
- **Select Row** (row is highlighted): The users currently assigned to this Project are listed on the right-side of the page
- **Edit Project** ( icon): Opens a pop-up to edit the attributes of the Project. The attributes that may be edited are Project Name, Description, Active flag, and Default Reserve for Container flag.
Supplier Maintenance

USER IMPACT

This feature is intended for use by: Administrators

Accessed Via: Administrator Settings / Supplier Create, Administrator Settings / Supplier Search

Permission required: “Supplier Create Supplier”, “Supplier Maintain Suppliers”

RMM 19.1.0 migrates all of the Supplier creation and maintenance functionality.

Supplier Create

The Supplier Create page (pictured below) allows a user with the “Supplier Create Supplier” permission to create a supplier by entering in a supplier name. Once the user has entered the name and clicked save, they will be taken to the Supplier Edit page (detailed later in this document). New to this release, a user cannot use the Supplier Create function to create a supplier with the same name as an existing supplier.
Supplier Search

The Supplier Search page allows a user to search for suppliers. To access this page the user must have the “Supplier Maintain Suppliers” permission. Up to a maximum of 500 suppliers will be returned on this page. From the search result set, a user can edit a supplier or delete the supplier (where permissible).

The Supplier Search page is pictured below.

![Supplier Search](image)

**Supplier Search**

Users may export suppliers that have been returned from the search or all suppliers in the RMM database (new for this release). The export contains additional columns that are not displayed in the search result.

The value provided in the Name or Identifier search field will search against the supplier name and all supplier synonyms (such as Purchasing System ID, Catalog ID, etc.). The wildcard character "*" is supported.

The user can search for active (default), inactive or all suppliers that meet the provided criterion.

Notes on the supplier search result set:

- The result set columns displayed are: Name, Active, Purchasing System Id, Catalog ID, Parent Supplier, and P & A.
- The “P&A” will display a check mark if the supplier has been configured to support the Product and Availability call.
- The result set is initially sorted by Name. The result set can be sorted by clicking on a column header.
ACTIONS

Export All Suppliers: New. This will export ALL suppliers in the RMM database to a CSV file (not only the suppliers that may be in the user’s search result set). The export will include additional columns that are not displayed in the search result.

Edit Supplier (icon): Opens the Supplier Edit page

Delete Supplier (icon): Deletes the supplier. When a supplier cannot be deleted, the icon is displayed in place of the Delete icon. Clicking the icon will display a message explaining why a particular supplier cannot be deleted

Export Result Set (icon): Exports the suppliers in the user’s search result set to a CSV file. The export will include additional columns that are not displayed in the search result.

Scroll to Top (icon): Returns the user to the top of their search results

Note On Terminology

For this release there has been a change in how RMM refers to certain supplier identifiers. The table below references the old and new terms.

<table>
<thead>
<tr>
<th>Term in previous releases</th>
<th>Term in this release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Punchout Supplier ID</td>
<td>Purchasing System ID</td>
</tr>
<tr>
<td>Channel Supplier</td>
<td>Catalog ID</td>
</tr>
<tr>
<td>Purchasing Gateway</td>
<td>Legacy ID</td>
</tr>
<tr>
<td>Non Preferred Supplier ID</td>
<td>Non Catalog ID</td>
</tr>
</tbody>
</table>
Supplier Search Export File

The exported search result data set includes the following fields:

- Name
- Active
- Parent Supplier
- Contact
- Phone #
- Email
- Address 1
- Address 2
- City
- State/Province
- Zip/Postal Code
- Country
- Purchasing System ID (previously called Punchout Supplier ID)
- Catalog ID (previously called Channel Supplier)
- Legacy ID (previously named Purchasing Gateway)
- Non Catalog ID (previously Non Preferred Supplier ID)
- Customer #
- P & A
- Alias (up to five aliases will be exported)
- Last Modified By
- Last Modified Date
Supplier Edit

The Supplier Edit page allows the user to make all updates to a supplier on a single page. The simplified interface provides immediate feedback allowing a user to easily see when a supplier is configured for JAGGAER’s Availability Check through the hosted catalogs and when a supplier cannot be made inactive with explanatory information.

The following is a picture of the General section of the supplier edit.

![General section of the supplier edit](image)

Notes on the General Section

Product & Availability

The Product & Availability badge is displayed for suppliers configured to accept P&A Calls. This is configured via the System Administration module’s Code Tables | Spend Director Product Availability Codes

Active

If Active badge is displayed, it means the supplier cannot be inactivated. Suppliers cannot be inactivated if they are on open Requests or are the primary Replenishment supplier for a Stockroom item. The icon is displayed when a supplier cannot be inactivated.

If the supplier can be inactivated then the following widget is displayed

Parent Supplier

The Parent Supplier cannot be changed once it is saved for a supplier.
Worksheet Printing

USER IMPACT

This feature is intended for use by: System Administrators, Health and Safety Administrators, Lab Administrators and Stockroom Administrators

Accessed Via: Container Operations / Container Operation Worksheet  
Container Operations / Stockroom Request Worksheet  
Administrator Settings / Hand Held Configuration Scan Sheet

Permission required: "Container Bar Code Worksheet", "Stockroom Request Worksheet", "Hand Held Configuration Scan Sheet"

RMM 19.1.0 migrates all worksheet printing functionality. New to this release, there now is no limitation on the number of user bar codes that can be printed on a worksheet; previously, only four could be printed. Also in addition to printing employee bar codes on the worksheets, a worksheet of only employee bar codes may be printed via the People Search page, as detailed later in this document

Container Operations Worksheet

- All selected users are listed on the left-side of the page
- All scan functions are listed on the right-side of the page

ACTIONS

- Room:
  o The Container Operations Worksheet page opens defaulted to the primary room of the logged in user.
  o New in this release, the logged-in user and all users whose primary room matches the room selected are automatically added to the "Selected Lab Occupants". In previous releases only the logged in user was automatically added.
  o Selecting a new room will replace the listed users with the users in the newly selected room. Note that while the room selection widget allows the user to select a sub-location, only the room will be displayed on this page, and only the room will be printed on the worksheet.
• **Add Lab Occupant**: Search for additional users to add to the Selected Lab Occupants section. Names will appear for selection after a few characters are entered
  - The number of “Selected Lab Occupants” is not limited

• **Generate Worksheet**: Opens a new tab displaying the Container Operations Worksheet generated from the current selections. The worksheet may be printed from this new tab. Note that that worksheet layout has been modified from previous releases.

• **Remove Item** (icon): Removes a user from the list of Lab Occupants to be printed on the worksheet

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**Stockroom Request Worksheet**

The Stockroom Request Worksheet page works in a very similar fashion to the Container Operations Worksheet. Please read the description of the Container Operations Worksheet for more information.

**Hand-Held Configuration Scan Worksheet**

The hand-held configuration worksheet is used to configure mobile computers (hand-held scanners). To print the Hand-Held Configuration Scan Sheet, the user simply selects Hand Held Configuration Scan Sheet menu item from the Administrator Settings section. The scan sheet page will be displayed from which the user can print the scan sheet. New to this release, the scan sheet will display the URL in clear text in addition to the URL in bar code format.
Employee Bar Codes – Printing and Export

USER IMPACT

This feature is intended for use by: System Administrators, Health and Safety Administrators, Lab Administrators and Stockroom Administrators

Accessed Via: People Search / Print Employee Labels
People Search / Generate Employee Scan Sheet
People Search / Export Employee Bar Codes

Permission required: “Employee Scan Sheet and Labels” – note in previous releases this permission was named “Print Empl Scan Sheet/BC Labels”.

RMM 19.1.0 migrates all employee scan sheet and bar code label printing functionality. The employee scan sheet and employee bar code labels are used in conjunction with the container operations worksheet when performing container operations via mobile computers and keyboard wedge scanners. There are three ways in which to print employee bar codes:

- Print employee labels directly to a bar code label printer
- Export employee bar codes to a csv file. The csv file may be used in conjunction with third party printing applications to print employee labels.
- Generate Employee Scan Sheet – creates a scan sheet similar to container operations worksheet

From the People Search page, the administrator may search for users and then select users for which to print employee labels, generate an employee scan sheet, or export employee bar codes. These functions are accessible from the Operations menu on the People Search page.

Note that employee bar codes may also be printed via the Container Operations and Stockroom Request Worksheets as detailed previously in this document.

Print Employee Labels

When the user selects the print employee labels, a popup appears which allows the user to select the label printer, label type, and number of copies for the labels to be printed.

Export Employee Bar Codes

The Export Employee Bar Codes function will create a csv file with employee information. The columns in the export are shown in the example below. The csv file may be used in conjunction with third party printing applications to print employee labels.

<table>
<thead>
<tr>
<th>User ID</th>
<th>User Name</th>
<th>Organization</th>
<th>Email</th>
<th>Primary Location</th>
<th>Phone #</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>UP%Q2</em></td>
<td>Adams, Joe</td>
<td>Biology&gt;Microbiology</td>
<td><a href="mailto:etsupport@company.com">etsupport@company.com</a></td>
<td>Eds Site 1&gt;Bldg 1&gt;Floor 1&gt;Lab 101&gt;Aisle1</td>
<td>610-555-1212</td>
</tr>
<tr>
<td><em>UP%Q7</em></td>
<td>Aldred, Jane</td>
<td>Chemistry</td>
<td><a href="mailto:etsupport@company.com">etsupport@company.com</a></td>
<td>Philadelphia&gt;Main&gt;1st&gt;Lab1&gt;</td>
<td>610-555-1212</td>
</tr>
</tbody>
</table>
Note on User ID Column: the value in the User ID column is the internal representation of the user id and, when printed as a bar code, is recognized by RMM scanning software (mobile computers, scan kiosk, etc).

Generate Employee Scan Sheet

Prints a scan sheet with employee bar codes, an example which is pictured below.
3E Optimize EHS List Import

USER IMPACT

This feature is intended for use by:  Health and Safety Administrators

Accessed Via:  EHS Administration / 3E Optimize EHS List Import

Permission required:  “EHS 3E Optimize List Import” – this is a new permission for this release and must be assigned by the System Administrator to the relevant roles.

RMM 19.1.0 migrates the ability to import regulatory lists from 3E Optimize (formerly Ariel Data Manager), licensed separately from Verisk/3E.  Note that in previous releases, the ability to import these lists was found on the ERM Operations File menu (if EHS 3E Optimize was licensed) and required the permission “EHS List Maintain Lists”.

From the 3E Optimize EHS List Import page (pictured below), the user selects the Lists they want to Update or Add and click the “Process Selected Lists” button.

![3E Optimize EHS List Import Page](image)

The following message will then be displayed on the page.

![Message: 3E Optimize EHS List Import operation ongoing.](image)

While lists are being imported, the user may access other RMM pages.  Any user with the EHS 3E Optimize List Import permission will receive a notification when the list processing is completed.  Note that if any user accesses the import page, and lists are still being imported, they will see the above message, and will not be able to import any other lists until the current processing is complete.
API Changes and Enhancements

The following database and web service API’s have been enhanced.

- Create Substance – time zone offset has been added to account for time zone differences
- Create Container – time zone offset has been added to account for time zone differences

Time zone offset for both API’s is **not** required. Please read the RMM web services and database API documents for more information.
Fixed Issues

Following are the list of fixed issues for this release. Some of the issues were fixed in 9.4.1 but listed here for convenience). Note that numbers beginning with "ERM-" are numbers used by JAGGAER’s internal defect tracking system.

**ERM-17249** – due to performance issues, the version of JSME has been rolled back from version v2017-02-26 to v2016-06-19

**ERM-17201** – When the "Container Authorization Needed" notification template is modified (or even simply saved without any changes made), a number of lines are removed from the template.

**ERM-17143** - Creating new substance from shopping cart item can have incorrect MFCD number and incorrectly update the CASStructureMap table with the erroneous MFCD number. (Fixed in ERM 9.4.1)

**ERM-17035** - When Transport Hazards are viewed from the Container View and Material View pages, the Primary, Secondary and Tertiary fields are always populated, even if there is only a primary transport hazard. (Fixed in ERM 9.4.1)

**ERM-16967** - Reprint pick slip did not always work correctly, depending on a user's time zone.

**ERM-16954** - Loading of structure search criteria page extremely slow using ChemDraw using Internet Explorer. (Fixed in 9.4.1)

**ERM-16928** – Addressed issues with time zone and scheduling of reports. If a user is not in the UTC time zone and the user schedules a report to run multiple times a day, and the scheduled times cross midnight UTC time, the reports will not run after midnight UTC time.

Example: User schedules to run a report on Mon, Tue, Wed, Thu, Fri every five minutes between 11 AM and Two PM New Zealand Standard time – which is between 10 pm and 1 am UTC time.

Once the scheduler reaches midnight UTC time, the report will not run again because it thinks it's the next day.

**ERM-16909** - When a user completes an item on the To Do List and say yes to keep the container, the location is updated, but the Owner is not. (Fixed in ERM 9.4.1)

**ERM-16868** - When a user specified a delivery location at the shopping cart item level (as opposed to just the header level), the incorrect delivery location was displayed when viewing the held cart item. (The correct delivery location was displayed when viewing a request item.) (Fixed in ERM 9.4.1)

**ERM-15988** – Structure Source Search against internal channels (labs, storerooms, and stockrooms) is extremely slow. (Fix in ERM 9.4.1).
Upgrade Considerations

The following is a check list of items to consider for the RMM 19.1.0 upgrade.

Container Expiration Notifications

Container expiration notifications are notifications sent to users when containers are about to expire. In previous releases, the notifications were generated by scheduling the Container Expiration Alert report. In this release, expiration notifications are scheduled via the Manage Expiration Notifications page.

After the upgrade the notifications will NOT be scheduled to run.

If you had previously scheduled the Container Expiration Alert report, you will need to configure it to run via the Manager Expiration Notifications page. Please read the Manage Expiration Notifications section for more information.

Scan Operations Kiosk

The new Scan Operations Kiosk is accessed via a different URL than RMM. The URL is as follows:

http://[RMM_Server]/scan-kiosk/app/login/

where [RMM_Server] is the location (including port if necessary) of the RMM application server.

Only users with the “Container Operations Scan Kiosk” permission may start the kiosk. On upgrade, any role with the “System Administration” permission will be assigned the “Container Operations Scan Kiosk” permission. Please read the Scan Operations Kiosk section for more information.

Delete Reports

After RMM is upgraded, the new delete reports job will be automatically scheduled to run on midnight (UTC time for hosted, local midnight time for deployed) and to delete reports older than 365 days. Please read the Manage Reports section for more information.
Appendix – Data Loader Permissions

To access the Data Loader page, the following permission is required “Data Loader Load Page”.

Once on the Data Loader page, the following permissions are needed to load each individual data load type.

<table>
<thead>
<tr>
<th>Data Loader Type</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Containers</td>
<td>Data Loader Load Container</td>
</tr>
<tr>
<td>Container History</td>
<td>Data Loader Load Container Transfer History</td>
</tr>
<tr>
<td>Cost Center and Cost Center Group</td>
<td>Data Loader Load Cost Center and Cost Center Group</td>
</tr>
<tr>
<td>Inventory Reconciliation Scanned Data Format</td>
<td>Data Loader Load Inventory Reconciliation</td>
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<tr>
<td>Inventory Reconciliation Standard Text Format</td>
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<tr>
<td>Locations</td>
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<tr>
<td>Location Storage Codes</td>
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<tr>
<td>People</td>
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<tr>
<td>PO Assignment</td>
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<tr>
<td>Stockmaster Items</td>
<td>Data Loader Load Stockroom</td>
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<tr>
<td>Stockmaster Item Price</td>
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<tr>
<td>Stockroom Containers</td>
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<tr>
<td>Stockroom Inventory</td>
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<tr>
<td>Substances</td>
<td>Data Loader Load Substance</td>
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<tr>
<td>Substance Flex Fields</td>
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<tr>
<td>Suppliers</td>
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