Inventory Enterprise

Inventory Enterprise is a ChemOffice Enterprise based application designed to manage the reagent tracking needs of chemical and pharmaceutical research centers. The system manages data associated with both commercially procured and internally produced chemical substances from their procurement or initial production through their depletion and disposal.

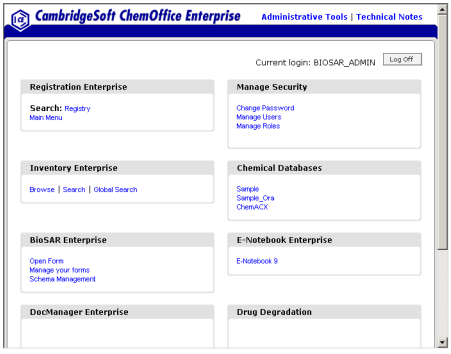
Inventory Enterprise is an Oracle-based, ChemOffice Enterprise product. Designed for large organizations, it has a number of features.

This chapter introduces the terminology and the User Interface, describes the set-up and management of an inventory database, and discusses the search forms used to locate substances and containers in the inventory.

The three primary entities in the system are Locations, Substances, Containers, and described below:

Logging in

All versions of Inventory use a password based login. Logging in to Inventory Enterprise brings you to the ChemOffice Enterprise homepage.



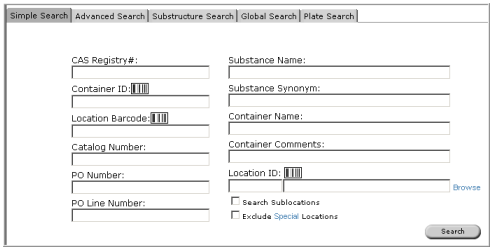
Click the **Browse** link under Inventory Enterprise to view the Inventory database.

NOTE: *Administrative tasks relating to login, such as adding users and changing passwords, are covered in other sections. For Enterprise versions, "Manage Users and Roles" on page 192.*

Searching Inventory Enterprise

Simple Search

The simple search option allows searching through the use of CAS number, Container barcode, Location Barcode, Catalog number, PO number, PO Line Number, Substance Name, Substance Synonym, Container Name, Container Comments, and Location ID.



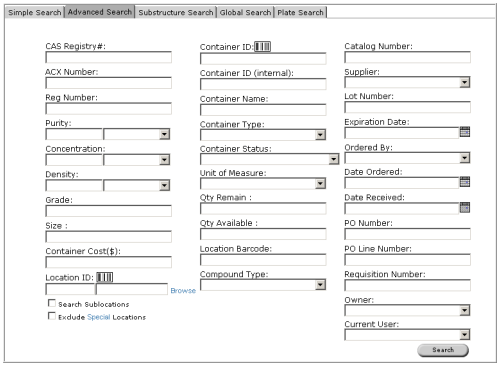
How to search

1. Enter the desired information to search for.
2. Select the **Search Sublocations** checkbox if you want to search all sublocations of the chosen location.
3. Select the **Exclude Special Locations** checkbox if you want to exclude special locations.
4. Click **Search** in the toolbar.

A list of containers matching your search parameters is returned. Clicking on one of the containers will allow you to view, the location of the container (left frame), container information (upper right frame), and the contents of the container (lower right frame).

Advanced Search

The advanced search option allows searching through the use of CAS number, ACX number, Reg Number, Purity, Concentration, Density, Grade, Size, Container Cost, Location ID, Container ID (barcode), Container ID (internal), Container Name, Container Type, Container Status, Unit of Measure, Qty Remain, Qty Available, Location Barcode, Compound Type, Catalog number, Supplier, Lot Number, Expiration Date, Ordered By, Date Ordered, Date Received, PO Number, Owner ID and Current User ID.



How to search

1. Enter the desired information to search for.
2. Select the **Search Sublocations** checkbox if you want to search all sublocations of the chosen location.
3. Select the **Exclude Special Locations** checkbox if you want to exclude special locations.
4. Click **Search** in the toolbar.

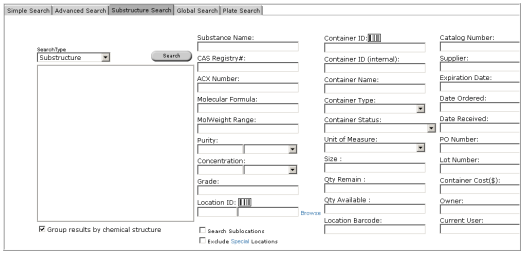
A list of containers matching your search parameters is returned. Clicking on one of the containers will allow you to view, the location of the container (left frame), container information (upper right frame), and the contents of the container (lower right frame).

Substructure Search

The substructure search option allows searching through the use of all of the attributes in the Advanced Search in addition to Substance Name, Molecular Formula, MolWeight Range, and of course, Substructure.

To allow you to draw your substructure, a ChemDraw Plugin will open along with this search tab. For more information about using the ChemDraw Plugin, see Drawing Chemical Structures in the ChemDraw User's Guide.

Additionally, the structure drawn can be searched for assuming it to be a Substructure, Full Structure, Exact Structure, or with Tanimoto Similarity. Select the correct type under Search Type.



How to search

1. Enter the desired information to search for.
2. Select the **Search Sublocations** checkbox if you want to search all sublocations of the chosen location.
3. Select the **Exclude Special Locations** checkbox if you want to exclude special locations.

4. Select the **Group results by chemical structure** checkbox if you want results grouped by chemical structure.
5. Click **Search** in the toolbar.

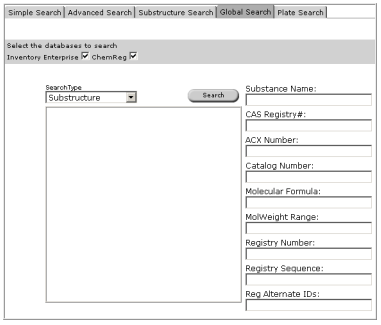
A list of substances matching your search parameters is returned. Clicking on the details button of one of the substances will allow you to view, all of the inventory containers that contain that substance. For information about Searching for substances and their properties, "Searching for a Substance" on page 120.

Deselecting the "Group results by chemical structure search box" will lead directly to a list of containers matching the search criteria (bypassing the substance grouping).

Global Search

The Global Search form allows users to search over the Registration Enterprise, ChemACX, or both, simultaneously with an Inventory Enterprise search. When results are returned, Inventory, Registration, and ACX results remain separate, but the application indicates if the retrieved substance is found in any inventory containers.

The global search option allows searching through the use of Substance Name, CAS number, ACX number, Catalog number, Molecular Formula, MolWeight Range, Registry Number, Registry Sequence, Reg Alternate IDs, and Substructure.



How to search:

1. Select the checkboxes next to the applications you would like to search over.
2. Enter the desired information to search for. For more information about entering search criteria, see "Searching ChemOffice Enterprise Applications" on page 194.

   Additional fields may appear on this search form. Any additional fields have been defined for your site. Please see you system administrator for more details.
3. Click **Search** in the toolbar.

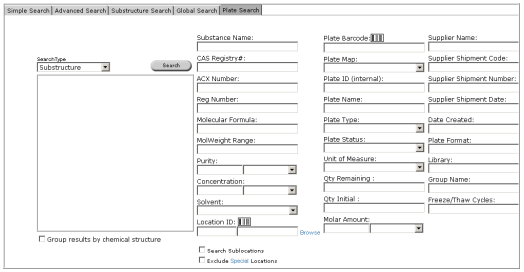
   A list of substances matching your search parameters is returned.
4. Click on the radio button next to the appropriate application to see results retrieved from that application. For more information, please see Viewing Results for a Global Search.

Viewing Results from a Global Search

Search results from a global search are split into three lists, one for each application. To access results from an application, select the radiobutton next to the application's name. Results are initially listed by substance. To view the results by container, click the **Details** button for a substance. The Details button is only active if there is an associated container.

Plate Search

The plate search option allows searching through the use of Substructure, Substance Name, CAS Number, ACX Number, Reg Number, Molecular Formula, MolWeight Range, Purity, Concentration, Solvent, Location ID, Plate Barcode, Plate Map, Plate ID (internal), Plate Name, Plate Type, Plate Status, Unit of Measure, Qty Remaining, Qty Initial, Molar Amount, Supplier Name, Supplier Shipment Code, Supplier Shipment Number, Supplier Shipment Date, Date Created, Plate Format, Library, Group Name, and Freeze/Thaw Cycles.



How to search:

1. Enter the desired information to search for.
2. Select the **Search Sublocations** checkbox if you want to search all sublocations of the chosen location.
3. Select the **Exclude Special Locations** checkbox if you want to exclude special locations.
4. Click **Search** in the toolbar.

A list of plates matching your search parameters is returned. Clicking on one of the plates will allow you to view, the location of the plate (left frame), plate information (upper right frame), and the contents of the plate (lower right frame).

Substance Management

The substance management area of Inventory Enterprise is available in the uppermost toolbar of the homepage and search page.

This area allows users to search for substances by substructure, registration numbers, and other physical properties. Although similar to the types of searches found on the homepage, this area concentrates on the searchable aspects of substances and returns a table of substances as opposed to containers.

If you have the appropriate privileges, in addition to allowing you to search for substances previously entered, this area also gives you the opportunity to add a new substance to the database. This option is available after entering the substance management area and clicking on **Add Mode**.

Creating a New Substance

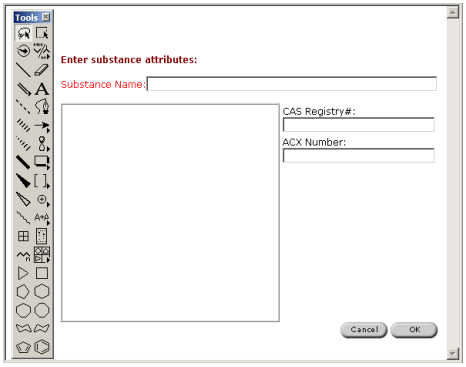
The "New Substance" form is available in the Substance Management area of Inventory Enterprise.

To reach this form, do the following:

1. From the homepage, click Manage Substances.
2. Click **Add Mode**.

   This form is also available from the New Container Substance Tab, “Substance Tab” on page 129.

   Following screenshot appears.



How to create a new substance:

1. Enter information about the new substance.

NOTE: *More fields may appear in your form. These forms are customized for your site. Please see your system administrator for more details.*

2. Click **Add Record** in the toolbar.

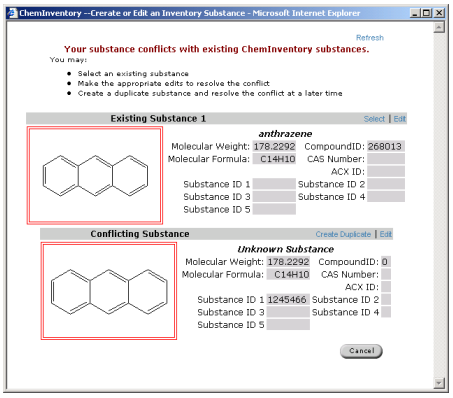
   If a conflict is recognized in the system (i.e. the same structure or Substance Name), the Conflict Resolution page appears. Otherwise, the substance is added to the system.

3. Click OK.

New Substance Conflict Resolution

The New Substance Conflict Resolution is used to flag and correct duplicates in the system. After creating a new substance in Inventory Enterprise, the Conflict Resolution page appears if there is a conflict in any unique fields. Unique fields are defined by the system administrator, but by default are substructure, Substance name, CAS number and ACX number. This only checks conflicts within Inventory Enterprise, not with Registration Enterprise and ChemACX.

If a conflict is found, a page like this one appears:



The conflicting field is highlighted in red. In the example above, the existing substance and the conflicting substance (which is being added) share the same substructure.

From here, the user has three options:

Conflict Resolution - Select

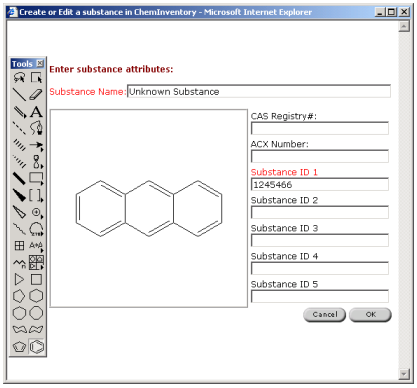
The option to select an existing substance and abort the new substance creation, is only available if the user is currently creating a new container. This option is not available from the Substance Management area of the application.

To select one of the existing substances rather then adding a new substance, click Select in the grey header bar above the substance you would like to select. You will be returned to continue creating a new container with the substance inserted.

Conflict Resolution - Edit

To edit the duplicate substance or an existing substance:

1. Click **Edit** in the grey header bar above the appropriate substance.
   The substance record appears.



2. Edit the appropriate fields.
3. Click **OK**.

Conflict Resolution - Create Duplicate

The option to create a duplicate by adding the new substance regardless of the conflict, is only available if the user is currently creating a new container. This option is not available from the Substance Management area of the application.

To create the duplicate, click Create Duplicate in the grey header bar above the conflicting substance. You will be returned to continue creating a new container with the substance inserted.

Creating a duplicate is not recommended, but is an option. To later search for all duplicates in the system, select System Duplicates from the Compound Type listbox in the Advanced Search form.

Creating Inventory Substances from Registration Enterprise and ChemACX

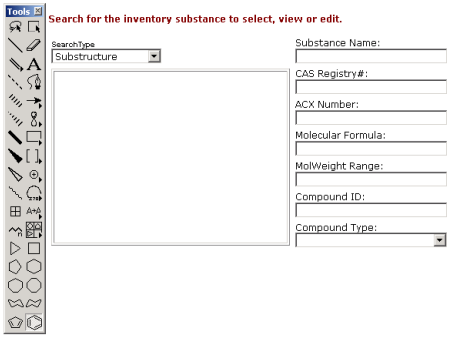
Inventory substances can be created from both the Registration Enterprise and ChemACX. If this option is not available from your instance of the Registration Enterprise or ChemACX, please see your system administrator.

Searching for a Substance

A form made to make finding a substance easier is available in "Substance Management" on page 118. To reach this form, simply click Manage Substances from the homepage.

This form is also available when clicking on the Select Substance Link in the New Container Substance Tab. For more information, please see New Container Substance Tab Form (below).

This form is a simplified version of the Substructure Search form found on the homepage. The following attributes are available to search under from this page: Substructure, Substance Name, CAS number, ACX number, Molecular Formula, MolWeight Range, Compound ID, and Compound Type.



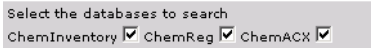
How to search:

1. Enter the desired information to search for.
2. Click **Search** in the toolbar.

A list of substances matching your search parameters is returned. Clicking on the details button of one of the substances will allow you to view, all of the entered properties of the given substance.

New Container Substance Tab Form

If accessed through the New Container Substance Tab, the following bar appears at the top of the form



The bar allows the user to search over all three applications simultaneously. For more information about global searches, "Global Search" on page 117.

After the search is performed, select the **Details** button for the correct substance, and click **OK** to insert the substance in your new container.

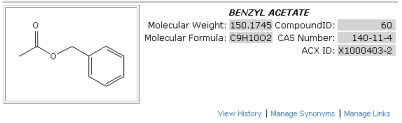
Perform another type of search.See "Searching Inventory Enterprise" on page 115..

Editing a Substance's Details

To edit a substance:

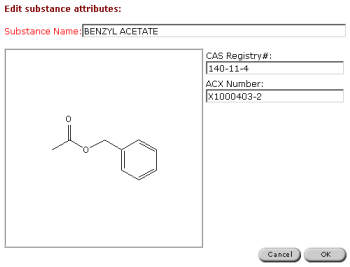
1. Perform a search and click on the **Details** button for the substance.

   A page appears displaying all retrieved details for the appropriate record.



2. Click **Edit Mode**.

   The record appears in Edit Mode.



3. Enter or edit the appropriate information.
4. Click **OK**.

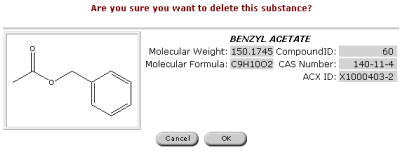
NOTE: *If a duplicate for any required field is found in the system, the conflict resolution page appears. Please see Substance Conflict Resolution, page 119 for more information.*

Delete a Substance

To delete a substance:

1. Perform a search and click on the **Details** button for the substance.
2. Click **Delete Record**.

   A page appears asking for confirmation.



3. Click **OK**.

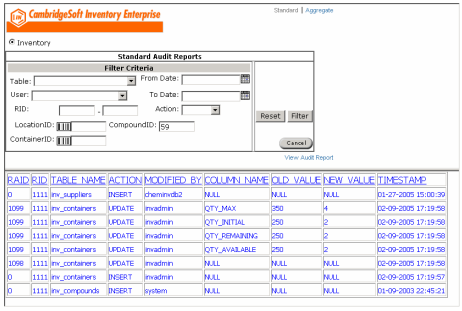
View History

The view history area of Inventory Enterprise is available as part of substance management.

To access this section, please take the following steps:

1. From the Substance Management area, access the search form.
2. Perform a search for the appropriate substance.
3. While in list view, click the **Details** button for the substance.
4. Click on the **View History** link.

   The View History window opens.



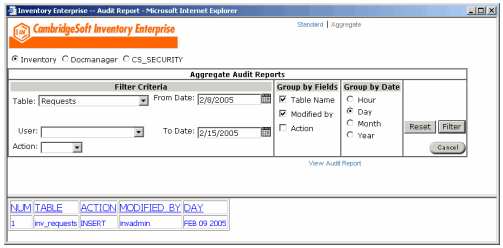
This area allows you to view an audit report of substances. User can filter the details according to Filter Criteria.

User can view Audit details in two ways, Standard & Aggregate. Application displays Standard report by default:

To view Aggregate report:

1. Click **Aggregate**.

   Aggregate report opens.



User can view the audit details group by fields. User can also select radio button to view group by date.

2. Enter details in appropriate fields.
3. Click **Filter**.

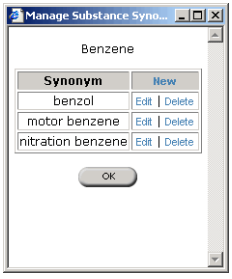
Synonym Management

The synonym management area of Inventory Enterprise is available as part of substance management.

To access this section, please take the following steps:

1. From the Substance Management area, access the search form.
2. Perform a search for the appropriate substance.
3. While in list view, click the **Details** button for the substance.
4. Click on the **Manage Synonyms** link.

   The Synonym Management window opens.

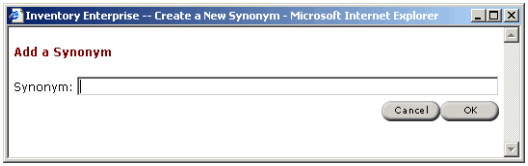


This area allows you to add new synonyms for a substance edit the synonyms which are already listed, or delete a synonym from the list.

After accessing the Synonym Management window, to add a new synonym:

1. Click New.

   A text field allowing the addition for a synonym appears.



2. Enter a **synonym**.
3. Click **OK**.

To edit a synonym:

1. Click **Edit** next to the synonym to be edited.
2. Edit the name of the synonym.
3. Click **OK**.

To delete a synonym:

1. Click **Delete** next to the appropriate synonym.
2. If you do want to delete this synonym from the list, Click **OK**.

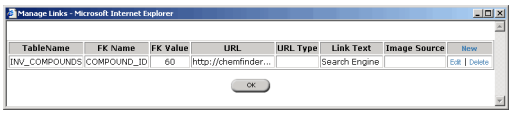
Link Management

The manage link area of Inventory Enterprise is available as part of substance management.

To access this section, please take the following steps:

1. From the Substance Management area, access the search form.
2. Perform a search for the appropriate substance.
3. While in list view, click the **Details** button for the substance.
4. Click on the **Manage Link**.

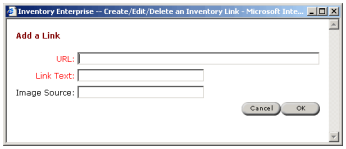
   The Manage Links window opens.



   This area allows adding a link to the substance.

5. Click **New** to add link.

The Add a Link window opens.



6. Enter the appropriate information.
   - Enter a URL in the URL list box.

NOTE: *You must enter http:// for the URL if applicable.*

   - Enter Text that you would like the link to be displayed as in the Link Text textbox.
7. Click **OK**.

To edit a link:

1. Click **Edit** next to the link to be edited.
2. Edit the appropriate information.
3. Click **OK**.

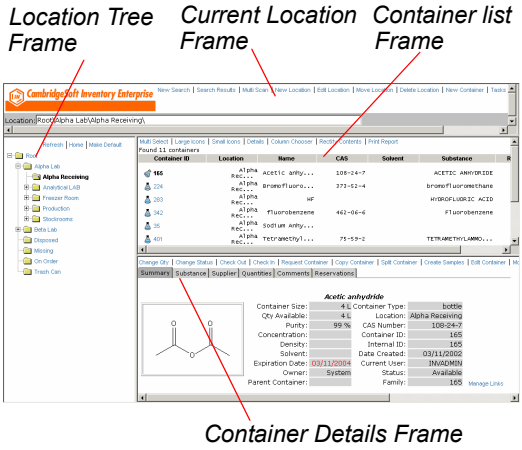
To delete a link:

1. Click **Delete** next to the appropriate link.
2. If you do want to delete this link from the list, click **OK**.

Container Management

The container management area of Inventory Enterprise is available in the uppermost toolbar of the homepage.

This area is split into 4 frames, shown below: Current Location Frame (top), Location Tree Frame (left), Container List Frame (top right), Container Contents Frame (bottom right).



Location Management

A location is defined as any "place" that a container can be stored. This includes a shelf, a refrigerator, or even a particular laboratory. Different facilities can decide how best to organize locations. For more information about locations, please see “Location Tree Frame” on page 124..

Current Location Frame

The location text box indicates the currently selected inventory location. Actions performed via the links on this frame apply to the currently selected location. In addition, you may enter a location id value into the location box to rapidly access a location on the tree. A barcode reader may be used to enter a location id value into this box further expediting navigation to a given location.

The following controls and functions are available within the current location frame:

Available to all users:

New Search

Returns to *Search Mode* screen. The last search form selected by the user will be automatically pre-selected.

Search Results

Returns to last hit list viewed while on *Search Mode*. If no search has been performed the link brings up the search default search form.

Help

Opens the Inventory Enterprise User's Guide.

Home

Brings the user back to the global login homepage.

Log Off

Logs the current user off.

Available to only some users:

New Location

Creates a new inventory *Location* at the currently selected location.

Edit Location

Allows setting of the following *Location* attributes: location name, location type, location barcode and location description.

Move Location

Allows moving a location to a different node on the location tree. Enter a location id value or use the browse link to select the destination locations. All containers and sub locations will follow with the moved location.

Delete Location

Deletes the currently selected location. A location must be empty before it can be deleted.

New Container

Creates a new container in the currently selected location. There are five required parameters to create a new container: Location ID, Container Type, Unit of Measure, Container Size, and Initial Amount. The container name and barcode fields will default to an auto generated container id value. Other container attributes can be completed by populating additional tabs on this dialog. In particular, a chemical structure can be assigned to the container by following the *New Substance* or *Select Substance* links from the Substance tab.

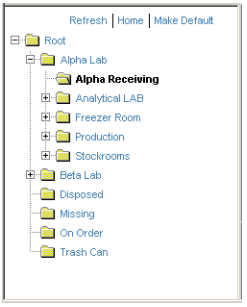
Order Container

Allows the user to enter an order for a container not currently in the Inventory Enterprise.

Tasks

Opens a new window listing administrative tasks available.

Location Tree Frame



The location tree control allows navigation of the *Location* hierarchy. Click on the +/- symbols to expand/contract location folders. Click on the location name to display its contents on the container list frame. The refresh link at the top right of the page repopulates the tree from the latest available location data and returns it to its fully contracted position.

New Search/Search Results

Searching is the easiest way to find particular substances or containers in Inventory Enterprise. The system allows for combined chemical and text searches of all attributes associated with a *Container*. Several search forms are available to accommodate

the search preferences of different users. For example, the *Substructure Search* form which allows searches based on chemical structure, substance name, CAS number and other attributes is particularly well suited for use by chemists. Similarly, the *Advanced Search* form which exposes fields such as container and location barcode is particularly well suited for use by stock room or receiving room personnel.

The *Global Search* form allows the user to search over the Inventory Enterprise, Registration Enterprise, and ChemACX databases simultaneously if all three applications are installed on the server.

Four distinct search forms are available from the homepage of the Inventory Enterprise through the use of tabs. Click on the tab indicating the type of search you would like to perform, and enter your search parameters.

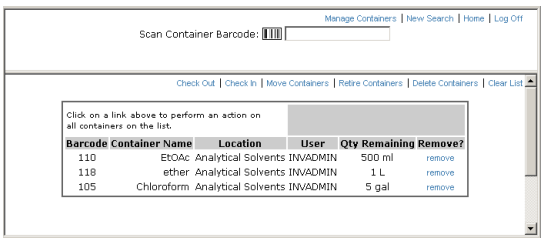
Multi Scan

The Multi Scan feature allows user to scan more than one container in the same list. User can perform few operations such as Check In, Check Out, Move Container, Retire Container, Delete Container and Clear List, on the scanned container(s).

In order to scan new container:

1. From the Current Location Frame, click **Multi Scan**.

   The Multi Scan window opens.



2. Enter **Container ID** in the field, press Tab.

NOTE: *User can scan multiple Container IDs.*

NOTE: *User can also remove container by clicking the Remove link.*

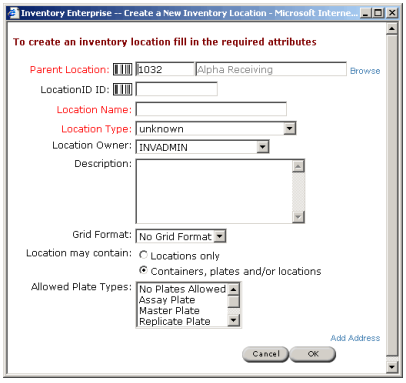
New Location

Containers are located in different places throughout a facility. The types of locations necessary in your Inventory Enterprise is highly dependent upon your setup.

In order to create a new location:

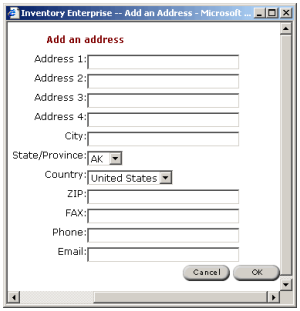
1. From the homepage, click **Manage Containers**.
2. Use the location tree to select where the new location should be created.
3. Click New Location in the Current Location Frame.

   The New Location window opens.



4. Enter the desired information in the window that opens.
5. Click **Add Address** link.

   The Add Address window opens.



6. Enter the desired information about address in the window.
7. Click **OK**.

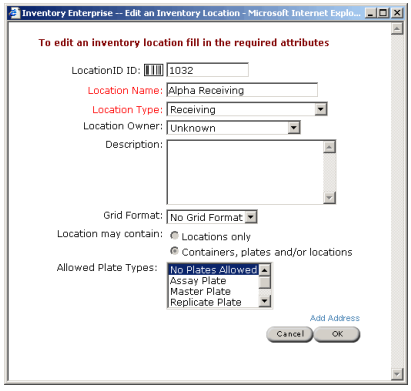
Edit Location

After a location is created, its properties may change. For example, the user may need to rename the location or add an address for the location.

In order to change the properties of a particular location:

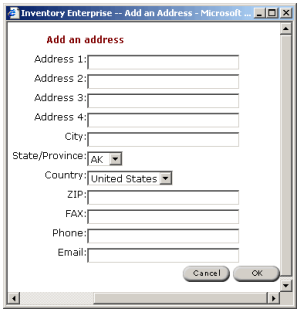
1. From the homepage, click **Manage Containers**.
2. Browse to the location to be edited in the Location Tree Frame.
3. Click Edit Location in the Current Location Frame.

   The Edit Location window opens.



4. Make sure the information listed in the window that opens is for the correct location. Enter the desired new information in the window.
5. Click **Add Address** link.

   The Add Address window opens.



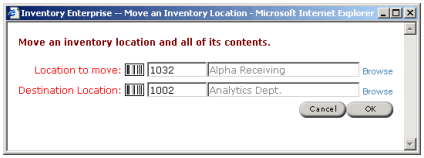
6. Enter the desired information about address in the window.
7. Click **OK**.

Move Location

After a location is created, it may be necessary to move the location to somewhere else in the tree. For example, a refrigerator may have been located in a lab on the first floor, but is being moved to a lab on the third floor. Of course all of the containers inside the fridge are moved along with it. It is easy to move a location along with all of it's contents in the Inventory Enterprise.

In order to move a location:

1. From the homepage, click **Manage Containers**.
2. Browse to the location to be moved in the Location Tree Frame.
3. Click **Move Location** in the Current Location Frame.
4. Make sure the information listed in the window that opens is for the correct location. Enter the new destination for the location to be moved.
5. Click **OK**.



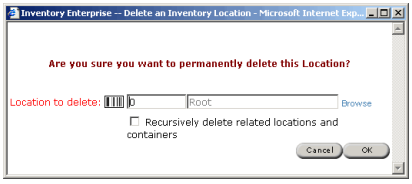
Delete Location

If a location needs to be removed from the inventory, you should use the delete location tool. If the location is merely being moved, "Move Location" on page 126.

In order to delete a location:

1. From the homepage, click **Manage Containers**.
2. Click **Delete Location** in the Current Location Frame.

   The Delete Location window opens.



3. Browse to the location to be deleted in the Location Tree Frame.
4. A location can only be deleted if it is empty, so make sure there are no containers in the location to be deleted.

NOTE: *You can not undo the deleting of a location.*

5. Click **OK**.

New Container

The "New Container" form is available in the Container Management area of Inventory Enterprise.

To reach this form, do the following:

1. From the homepage, click **Manage Containers**.
2. Click New Container in the Current Location Frame.

A window with multiple tabs labeled Required, Substance, Supplier, Contents, Optional, Owner, Comments, and Other (name may vary) opens.

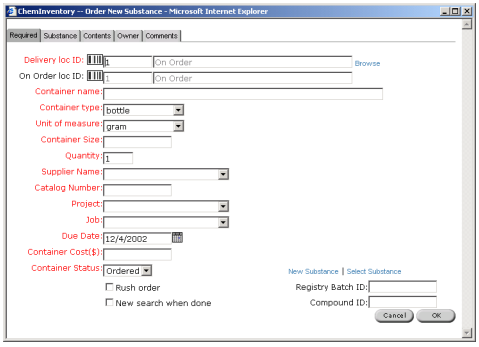
How to create a new container:

1. Enter information about the new container.
2. Click **OK** in the toolbar.

Order Container

Users can enter an order for a container that has not yet been created as part of the inventory by clicking on the Order Container link. If the container is already in the inventory and you would like to reorder the same container, please see Reorder Container.

The following window opens when the Order Container link is clicked:



The Substance, Contents, Owner, and Comments Tabs appear and react just as the tabs with the same name in the New Container window react.

The Required Tab in the Order Container window is also very similar to the New Container window. The Order Container Required Tab does not include all of the fields in that of the New Container

Window. Additionally, there are two location IDs: one for the delivery location and one for the on order location.

To order a container:

1. Click **Order Container** from the Current Location Frame

   The Order Container window appears.
2. Enter the required information and any other information which is desired.
3. Click **OK**.

Tasks

The following tasks are available to users with the correct administrative privileges. If you do not have privilege to access something you need to access, please see your system administrator.

- *Search*, see page 124
- *New Location*, see page 125
- *Edit Location*, see page 126
- *Move Location*, see page 126
- *Reconcile Location*, see page 133
- *Plate Settings*, see page 150
- Create Plate from Excel, see page 161
- *Create Plates from Text File*, see page 161
- *Custom Reports*, see page 161
- *Change Password*, see page 153
- *Manage Users*, see page 192
- *Manage Roles*, see page 192
- *Manage Container Requests*, see page 153
- *Manage Sample Requests*, see page 154
- *Analyze Audit Trail*, see page 159
- *Manage Approvals*, see page 158
- *Manage Tables*, see page 159

Default Location

To save a default location, please do the following:

1. From the Container Management section, browse to the location to be saved as the default in the Location Tree Frame.
2. Open that location by clicking on the folder icon next to the location name.

   The default location window opens.

3. Click OK.

Creating a New Container

The "New Container" form is available in the Container Management area of Inventory Enterprise.

To reach this form, do the following:

1. From the homepage, click Manage Containers.
2. Click New Container in the Current Location Frame.

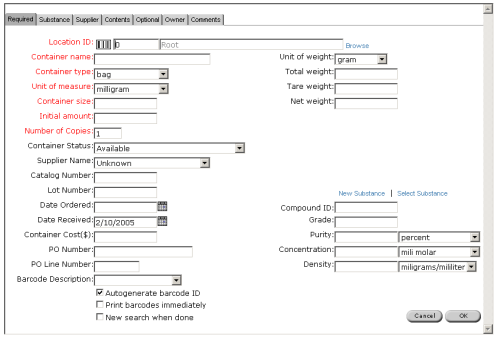
A window with multiple tabs labeled Required, Substance, Supplier, Contents, Optional, Owner, Comments, and Other (name may vary) opens.

How to create a new container:

1. Enter information about the new container.
2. Click **OK** in the toolbar.

Required Tab

The Required Tab of the New Container window includes all of the information required to create a new container. Truly required fields are noted as such with a red field name.



Substance Tab

The Substance Tab of the New Container window holds information about the substance in the container. When the tab is first opened, the tab is empty except for two links, New Substance and Select Substance.

In order to insert a substance into the record, click on **New Substance**, if you would like to insert a substance that is not registered yet, or **Select Substance**, if you would like to insert a substance that is already in the database.

If New Substance was selected, a new window opens that allows you to input information about the substance.

If Select Substance was selected, a new window opens that allows you to search for a substance.

Do the following to search:

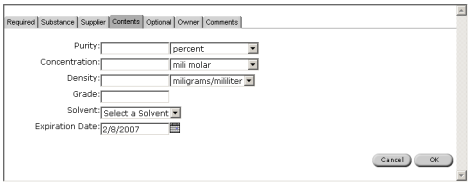
1. Enter the desired information.
2. Click **Search**.
3. A list of substances is returned. Click on the details button for the appropriate substance.
4. Click **OK** to insert the substance.

Supplier Tab

The Supplier Tab of the New Container window includes information pertaining to the supplier of the contents of the container.

Contents Tab

The Contents Tab of the New Container window includes information pertaining to the contents of the container. Because different batches of a substance can have slightly different properties, it is important to keep track of such information.

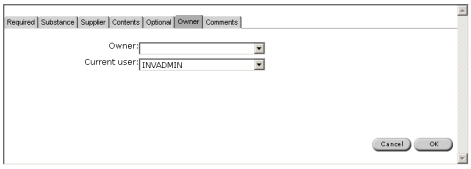


Optional Tab

The Optional Tab of the New Container window includes information that does not fit under any other heading, but may be important to include.

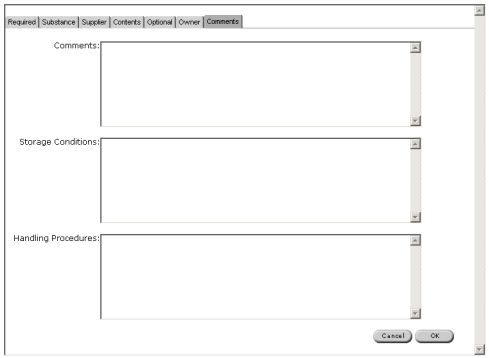
Owner Tab

The Owner Tab of the New Container window includes information about the owner and current user of the container. The current user must be an actuveuser of the Inventory Enterprise system.



Comments Tab

The Comments Tab of the New Container window allows the inclusion of comments about the container, or the contents of the container. This tab makes a space available to enter information not covered anywhere else.



Other Tab

The Other Tab of the Container window gives users access to optional customizable fields. This tab is fully customizable and will vary from site to site. To learn more about customizable fields, please see your system administrator.

Searching for a Container

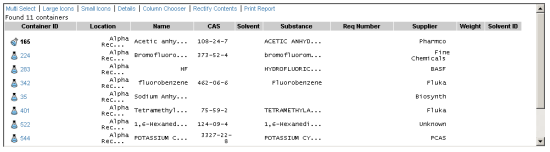
There is more then one way to search for a particular container. If you have some information about the container, but don't know it's actual location, using the search forms is often the easiest way to locate one or more inventory Containers. The system allows for combined chemical and text searches of all attributes associated with a Container. A search form configured to return matching Containers will result in a hit list comprised of containers matching the search criteria. Containers matching the search criteria appear on screen as a tabular report which can also be reproduced as a printable report. For more information about these search forms, "Searching Inventory Enterprise" on page 115.

If you know location of the container you are looking for, you can use the location tree to navigate through all inventory locations to find the container. The Location Tree is displayed in the Container Management area. For more information about the Location Tree and how to navigate it, see Location Management.

Viewing the Contents of a Container

After performing a search, or navigating through the location tree, a list of containers is displayed. For more information about searching for containers, see"Searching for a Container" on page 130.

Container List Frame

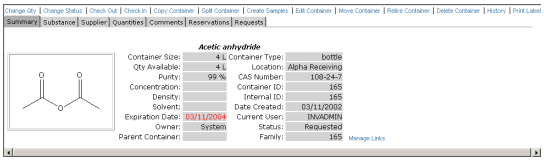


Both the container list frame found in the upper right hand frame of the Container Management area, and the report displayed after container based search results show a list of containers with some summary information.

Containers are sorted in descending order by Container ID, but can be resorted by clicking any of the column headers. The small triangle next to the column name indicates the sorting order. Sorting affects containers regardless of whether they are displayed on the current page.

Each container ID is preceded by a small flask. If the container information is open, the flask tips to the side. Click on one of the containers in the list to see the container details on the frame below.

Container Details Frame



All container attributes are displayed within the Container Details Frame. Given the large number of attributes associated with a container, they are subdivided into tabs which group the attributes into more manageable subsets. The first tab includes a summary of the most essential container attributes including container name, container id, barcode, location etc.... Other notable tabs include the substance tab, which summarizes the substance attributes and the supplier tab which brings together data related to the purchase of a chemical substance such supplier name, catalog number, lot number, container cost and purchase order number.

Viewing the Contents of a Container

Available Functions of Container List Frame

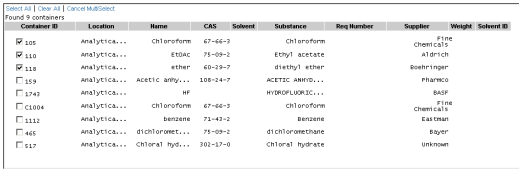
Multi Select

The Multi Select Link changes the container list frame to details view and places a checkbox next to each Container ID. This allows users to select more than one containers and performs one action on all of those containers at once.

For example, if you would like to move 3 containers to a new location:

1. Click **Multi Select**.

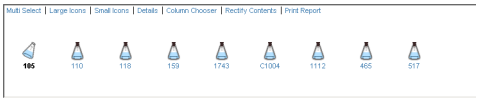
   The containers are listed in Details view with checkboxes next to each container ID.



2. Select the checkbox next to any container you would like to move.
3. Click **Move Containers** in the Container Details Frame.

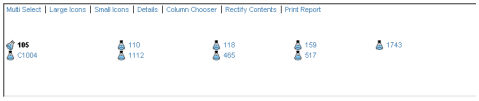
Large Icons

The Large Icons link displays the container flasks in the Container List Frame as large icons, similar to the Large Icons folder viewing option in Windows.



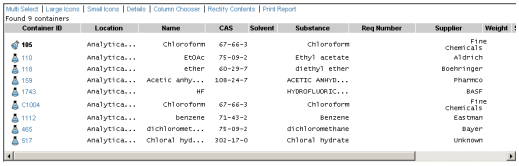
Small Icons

The Small Icons link displays the container flasks in the Container List Frame as small icons, similar to the Small Icons folder viewing option in Windows.



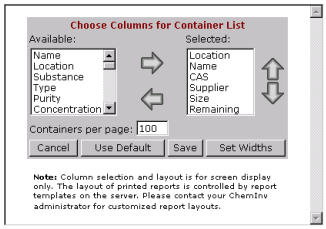
Details

The Details link displays the container flasks in the Container List Frame as a list of details, similar to the Details folder viewing option in Windows.

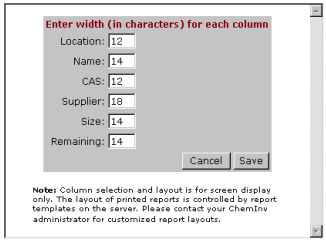


Column Chooser

The Column Chooser window allows the user to customize the appearance of result lists. It allows control over the selection, order, and width of columns to be displayed on screen as well as the number of containers displayed per page.



By clicking the Set Widths button, another window opens that allows the user to enter specific widths for each column.



Custom column settings are saved by the user's browser and remembered even after the browser has been closed. The settings available via the Column Chooser affect only the screen report. The appearance of printed reports is controlled by report templates managed by the application administrator. Multiple report templates can be associated with the screen report. Please contact the administrator if you need additional report templates produced.

Update Contents

At times, containers are moved and this is not updated in the inventory. Update Containers helps users to easily update the system confirming that a container is actually where the system thinks it is.

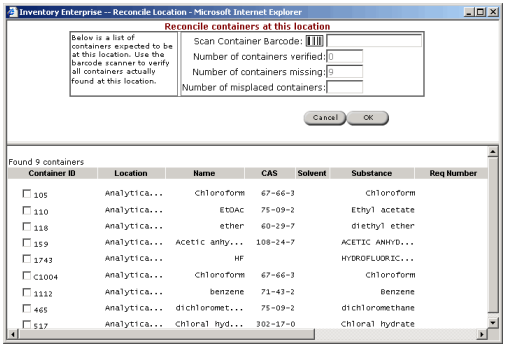
The Update Contents link opens a window which aids users in keeping the list of inventory containers in a particular location up to date. This tool is a casual way for users to confirm the existence of a particular container. If a particular container is not confirmed, no action is taken on that container. For a tool to correct any discrepancies in a location's contents, please use the Rectify Contents tool.

Update contents accomplishes the following:

- confirm that containers are still where the system thought them to be.
- move containers unexpectedly found at that location to specific location.
- allow for unknown containers to be created at specific location.

To update the contents of a location:

1. Open the appropriate location and click **Update Contents** in the Container List Frame. The Update Contents window opens.



2. Using a barcode scanner, or by manual selecting the checkboxes, select the container ID for each container that is being verified.
3. Click **OK**.

Rectify Contents

At times, containers are moved and this is not updated in the inventory. Rectify Containers help users to easily update the system confirming that a container is actually where the system thinks it is.

The Rectify Contents link opens a window which aids users in keeping the list of inventory containers in a particular location up to date. This tool is a formal way to correct inventory discrepancies. That is, if a particular container is not confirmed, that container is moved to the Missing Location in Inventory Enterprise. Rectify Contents is meant to be used on a quarterly or biannual basis during official inventory reconciliation efforts. For a less formal tool which only verifies the existence of a container in a location, please use the Update Contents tool.

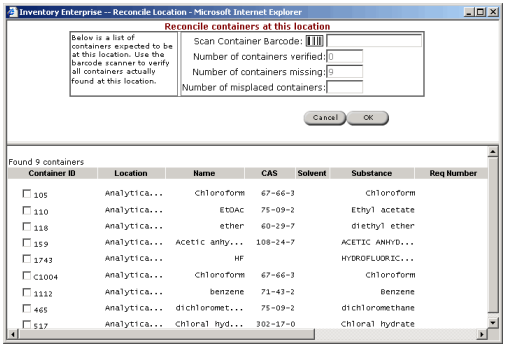
Rectify contents accomplishes the following:

- confirm that containers are still where the system thought them to be.
- move containers unexpectedly found at that location to specific location.
- allow for unknown containers to be created at specific location.
- move any containers that are not explicitly found to a missing location.

To rectify the contents of a location:

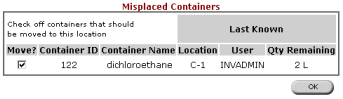
1. Open the appropriate location and click **Rectify Contents** in the Container List Frame.

   The Rectify Contents window opens.



2. Using a barcode scanner, or by manually selecting the checkboxes, select the container ID for each container that is being verified.

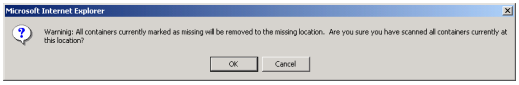
NOTE: *Any container IDs entered that are not currently in this inventory location, are listed in the upper frame.*



Select the checkbox next to any containers you would like moved to this location.

3. Click **OK**.

   The following message is displayed if there are containers listed which have not been verified:



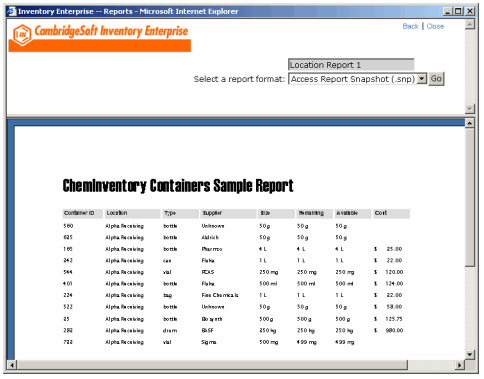
4. Click **OK** if you would like containers which have not been verified moved to the Missing Location.

Print Label/Report

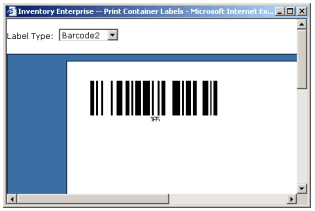
Reports can be printed from three places in Inventory Enterprise: the container list frame, the container view frame, and the search results window. All three of these reports are generated in

the same way, but can display different information. Reports are driven by report templates on the server. Typically, the system administrator creates report templates with the appropriate layout and content to be printed. Please contact the administrator if you need additional reports created to satisfy your need. You can choose different templates and formats from the list boxes at the top of the report. Once a report is created on the server it can be printed from the browser by using the print icon a the button of the report viewer.

Because reports are printed according to previously created report templates, information in a report is not necessarily the same information displayed in the window or frame that you choose to print. For example, the Print Report link in the container list frame will generate a report about the containers listed in that frame, but the report template may not include the container's cost, while the container list frame displays the container cost.



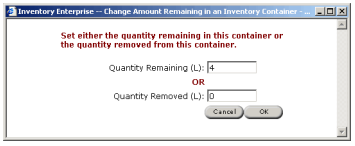
Container labels are printed via report writer as well. A label is considered a special kind of report which can include any of the attributes associated with a single container. The report writer is also able to encode any of the container attributes into a scan barcode.



Available Functions of Container Details Frame

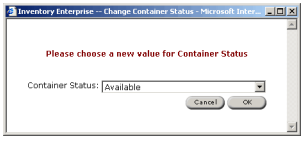
Change Qty

The Change Qty function allows the modification of the quantity of material remaining in the container. Quantities are measured in the predefined unit of measure associated with the container.



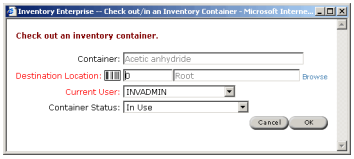
Change Status

The Change Status function allows user to change the status of the container. The status of container depends upon current situation, these situations may be Available, Empty, Missing, etc. All status options are configurational.



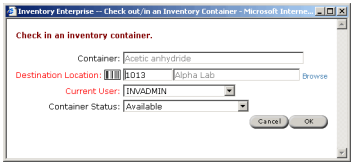
Check Out

The Check Out function is typically used when a user removes a container from a central storage location for subsequent use at a different location. The act of checking involves a change in container location plus a change in the current user responsible for the container.



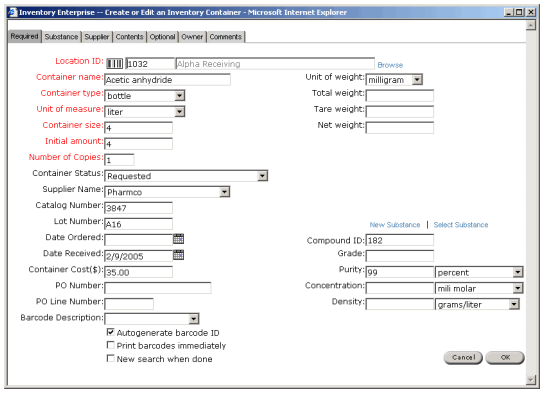
Check In

The Check In function performs the reverse of the Check Out process. It is typically performed when a user returns a chemical container to its central storage location. The system remembers the location and user under which the container was created and uses them as the default values during the check in process.



Copy Container

The Copy Container function allows you to create one or more containers using a preexisting container as a starting template. Typically, attributes such as lot number, container cost, and expiration date, may need to be modified before the new container(s) are created.



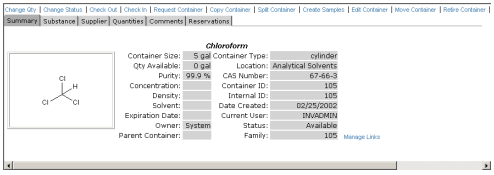
After you click the Copy Container link a Create Container dialog opens with all the data from the copied container already filled in the appropriate fields. Proceed by editing any fields that should differ from the copied container and the click **OK**. For more information about the fields, see Creating a New Container.

Certify Container

The Certify Containers function.

To certify a container:

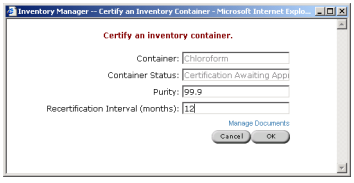
1. Open the container in Details view.
   Container details view opens:



2. Click **Certify Container**.

NOTE: *This link is only available if the certification date is not yet set.*

The Certify Container dialog appears.



3. Enter the **Purity**.
4. Enter a **Recertification Interval** in months. This value is used to calculate the recertification date (expiration date) for the container. The recertification date is set to the number of months entered from the current date.
5. Click **OK**.

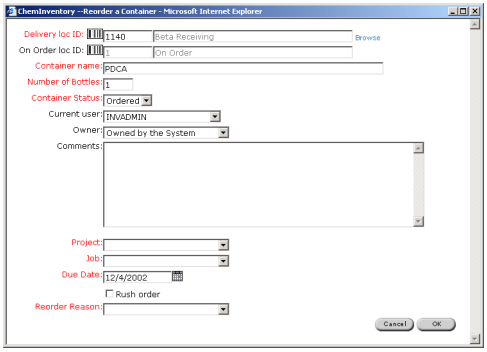
Reorder Container

Users can reorder any container in the inventory, if the container is not already on order. If the container that you would like to order is not currently in the inventory, please see "Order Container" on page 127.

To reorder a container:

1. Click **Reorder Container**.

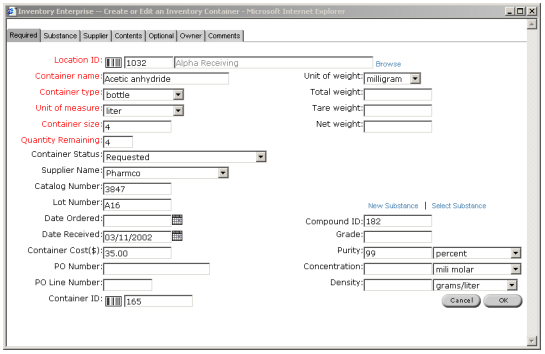
   The Reorder Container window appears.



2. Enter the required information and any other information which is desired.
3. Click **OK**.

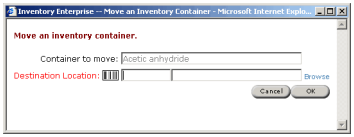
Edit Container

The Edit Container function allows editing of all container attributes. You may switch between the various tabs to access all container attributes. Changes to the container are only committed to the database once the *Update Container* button is clicked.



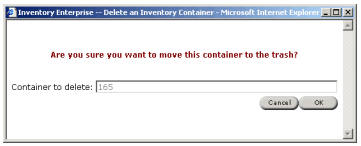
After the Edit Container window opens, proceed by editing any fields necessary and click OK. For more information about the fields, see "Creating a New Container" on page 128.

The Move Container function moves the currently selected container to a new location. The destination location ID can be directly entered or scanned into the text box in the dialog, or the browse link can be used to select a location from the tree.



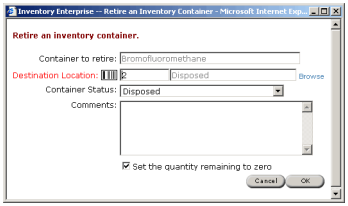
Delete Container

The Delete Container function deletes the currently selected container and moves it to the trash can. The only way items can be removed from the trash can is by using the Empty Trash function. Please see your system administrator for more information.



Retire Container

The Retire Container function retires the currently selected container. When a container is retired, it is not deleted, but is no longer in use.

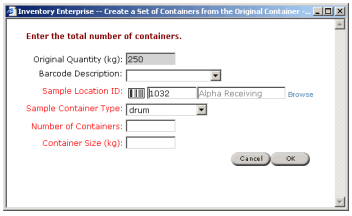


Split Container

The Split Container function splits contents of the current container into new containers, adding the specified number of new containers. The parent container will be removed (the container is now empty). Quantities in the new containers are updated automatically. When splitting a container, all of the contents must be used so the sum of the quantities of the new containers must equal the quantity of the original container.

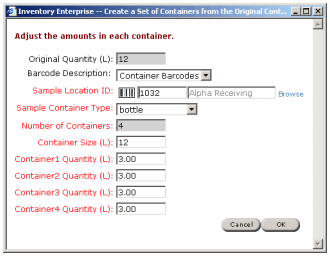
To split a container:

1. Click **Split Container**.
   The Split Container dialog appears.



2. Enter a value for each field. For more information about a field, click on the image above.
3. Click **OK**.
   A quantity field for each new container appears.

NOTE: *In the example below, the sum of Container Quantities must equal the total quantity.*



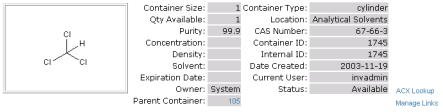
4. Make any changes necessary.
5. Click **OK**.

Merge Containers

The Merge Containers function merges two containers (which have the same parent ID) into one container. If a container has no parent ID, this function is not available.

To merge two containers (with the same parent ID):

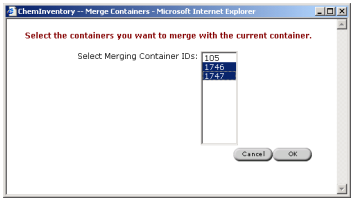
1. Open the first container in Details view.
   Container details view opens:



2. Click **Merge Containers**.

NOTE: *The Merge Containers function is only available if the container has a Parent ID.*

The Merge Containers window appears.



3. Select the container to merge with the currently selected container. Only the containers with the same parent ID are listed.

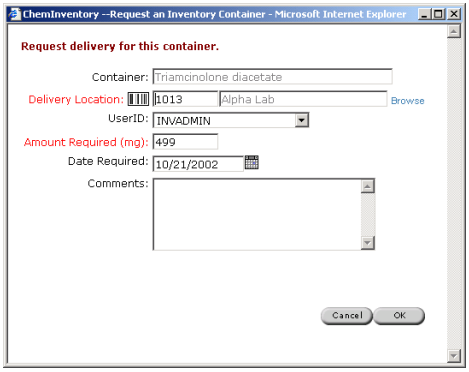
Request Containers

The Request Container link is only available from containers in stock room locations. A request can not be made if a previous request is still open.

To request a container:

1. Click Request Container in the Container details frame.

   The Request Container dialog box appears.



   The window is automatically populated with information about the container that is currently open.

2. Select a delivery location, User ID, Amount Required, and Date Required. Please Note, field names shown in red are required.

3. Click **OK**.

   The request has been made, and a Requests Tab is added to the container in the Container Details Frame.

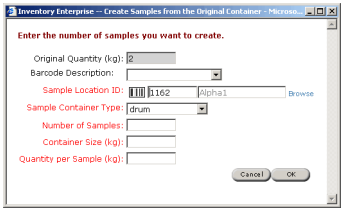
Create Samples

The Create Samples function samples the current container and creates additional containers from that container with a specified quantity. The parent container will remain intact with any remaining quantity. Quantities in the new containers and the parent container are updated automatically.

To create samples of a container:

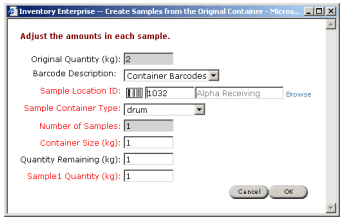
1. Click **Create Samples**.

   The Create Samples dialog appears.



2. Enter a value for each field.
3. Click **OK**.

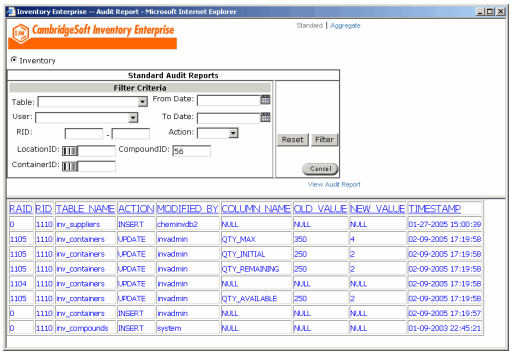
   The quantity remaining field is automatically populated and a quantity field for each new container appears.



4. Make any changes necessary.
5. Click **OK**.

History

The Container History link uses the Audit Report, page 159 window to display a container's history. Clicking on the **History** link will bring up the audit window and filters information to show any activity involving the current container.

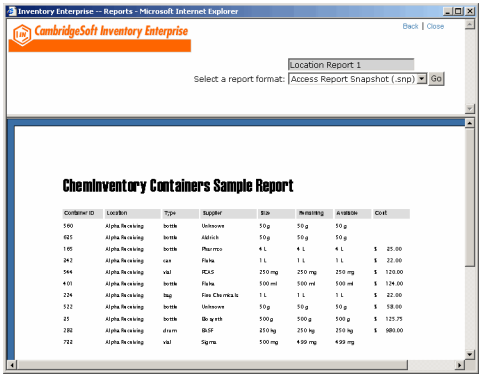


For more information regarding the Audit Reports, please see Analyze Audit Trail.

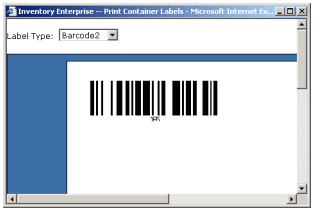
Print Label/Report

Reports can be printed from three places in Inventory Enterprise: the container list frame, the container view frame, and the search results window. All three of these reports are generated in the same way, but can display different information. Reports are driven by report templates on the server. Typically, the system administrator creates report templates with the appropriate layout and content to be printed. Please contact the administrator if you need additional reports created to satisfy your need. You can choose different templates and formats from the list boxes at the top of the report. Once a report is created on the server it can be printed from the browser by using the print icon a the button of the report viewer.

Because reports are printed according to previously created report templates, information in a report is not necessarily the same information displayed in the window or frame that you choose to print. For example, the Print Report link in the container list frame will generate a report about the containers listed in that frame, but the report template may not include the container's cost, while the container list frame displays the container cost.



Container labels are printed via report writer as well. A label is considered a special kind of report which can include any of the attributes associated with a single container. The report writer is also able to encode any of the container attributes into a scan barcode.

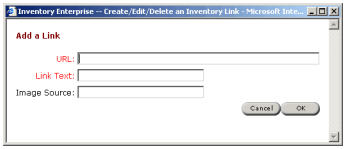


Link Management

Click Manage Links from a container record to add a new link:

1. Click **New**.

   A window allowing the addition of a link appears with current container information already populating the fields.



2. Enter the appropriate information.
- Enter URL in the **URL** listbox.

NOTE: *You must enter http:// for the URL if applicable.*

- Enter Text that you would like the link to be displayed as in the **Link Text** textbox.
3. Click **OK**.

To edit a link:

1. Click **Edit** next to the link to be edited.
2. Edit the appropriate information.
3. Click **OK**.

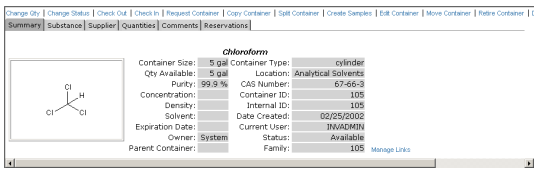
To delete a link:

1. Click **Delete** next to the appropriate link.
2. If you do want to delete this link from the list, Click **OK**.

Viewing the Contents of a Container

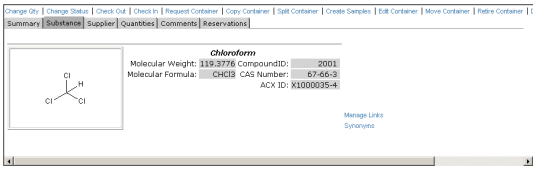
Summary Tab

The Summary Tab of the View Container frame provides a summary of important details about the container and its contents.



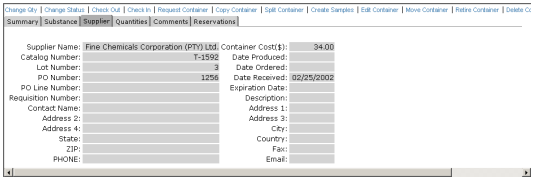
Substance Tab

The Substance Tab of the View Container frame provides information about the compound found in the container. It is possible to add synonyms for the substance from this tab by clicking on Synonyms.



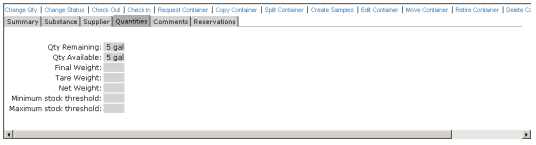
Supplier Tab

The Supplier Tab of the View Container frame provides information about the supplier of the container and/or its contents.



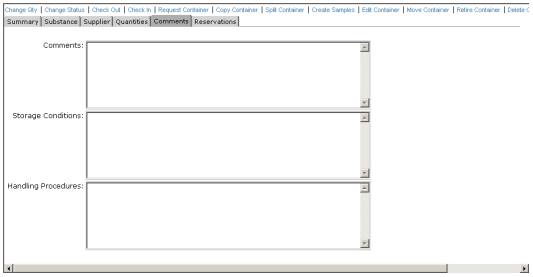
Quantities Tab

The Quantities Tab of the View Container frame provides information about the amount of stock necessary for the facility.



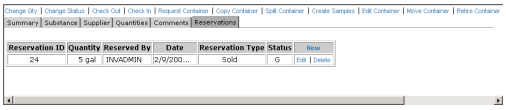
Comments Tab

The Comments Tab of the Container View frame allows you to enter comments about the container, the batch inside the container, the location, etc. This is a good place to record any information that does not fit in any other fields.



Reservations Tab

The Reservations Tab of the View Container frame provides information about any reservations made for the container's contents. This tab also provides the ability to enter a new reservation as well as edit or delete an existing reservation.



Other Tab

The Other Tab of the Container window gives users access to optional customizable fields. This table is fully customizable and will vary from site to site. To learn more about customizable fields, please see your system administrator.

EH&S Tab

The EH&S Tab of the View Container frame provides Environmental Health and Safety Data for the container. EH&S information is linked to records on two levels:

- Substance level - requires a valid CAS number in the record.
- Container level - requires a valid CAS number, Supplier Name, and catalog number in the record.

Container level EH&S information can not be added unless substance level information exists.

The EH&S tab is customizable by the system administrator, so the fields found under this tab vary. For more information about the fields in the EH&S Tab, please see your system administrator.

Requests Tab

The Requests Tab of the Container View frame displays the current requests on the container. If there is no active requests, the tab is not visible. A user can also edit and/or delete the current request if permissions allow it.

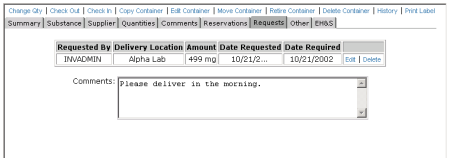
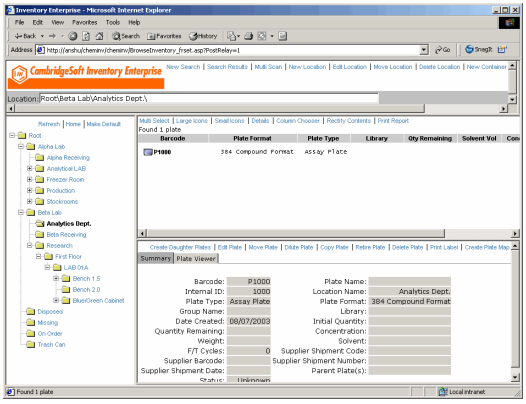


Plate Inventory

Plates are held in locations, much like containers. For this reason, plates are browsed in the same way that any other container is browsed.



Plates are indicated as such in the Container List Frame with a plate icon. When a plate is opened, the Plate Contents Frame is displayed in the bottom right frame.

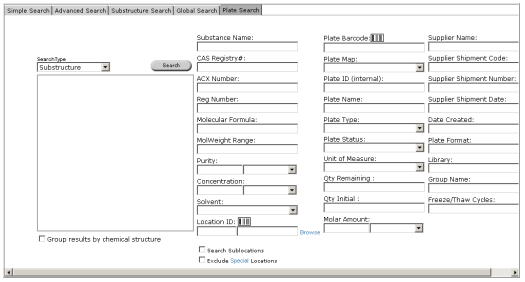
Plates and Containers can exist in the same location.

Creating New Plates

Inventory Enterprise does not contain the necessary tools to create new plates. Plates are created through the InvLoader. See “Inventory Loader” on page 147

Searching for a Plate

Plates are searched for under the plates tab on the search page. See “Plate Search” on page 117 for more information about the Plate Search Tab.



After performing the search, users are given a list of matching plates:

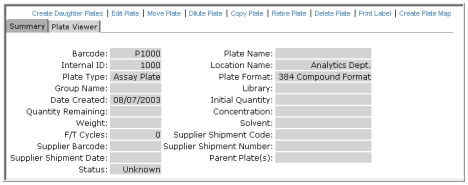
Viewing the Contents of a Plate

After performing a search, or navigating through the location tree, a list of containers and/or plates is displayed. For more information about searching for plates, “Searching for a Plate” on page 142.

The container list frame lists plates much like it does containers. Plates are distinguished from containers by the plate icon.

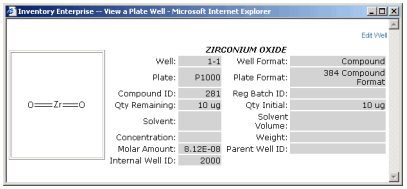
Plates are sorted in descending order by plate ID, but can be resorted by clicking any of the column headers. The small triangle next to the column name indicates the sorting order. Sorting affects plates regardless of whether they are displayed on the current page.

Click on one of the plates in the list to see the plate details on the frame below.



All plate attributes are displayed within the Details Frame Summary Tab. It lists all attributes for the plate, common to all wells, including plate ID, Barcode, Plate Type, Plate Name, Plate Format, etc....

The Plate Viewer Tab allows you to view the contents of the plate in a grid. Click on one of the wells to view the details for that well.



Available Functions from Plate Details Frame

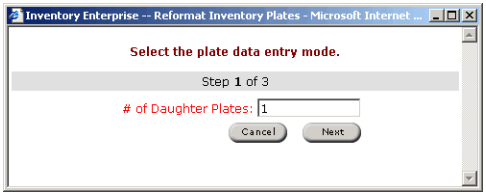
Creating Daughter Plates

The Create Daughter Plates function allows a user to create any number of daughter plates from a parent as long as the parent plate contains enough contents to fulfill the request. That is, if you would like to create 6 daughter plates taking 10 ml of a substance from the source plate which only contains 10 ml, you will be denied.

To create daughter plates:

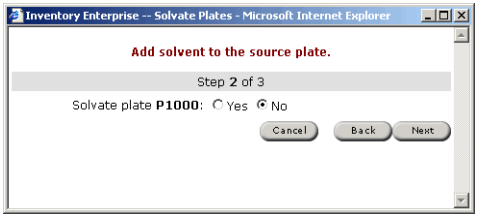
1. Search for or browse to the source plate.
2. Open the plate in the Details Frame.
3. Click **Create Daughter Plates**.

   The Create Daughter Plate dialog appears.



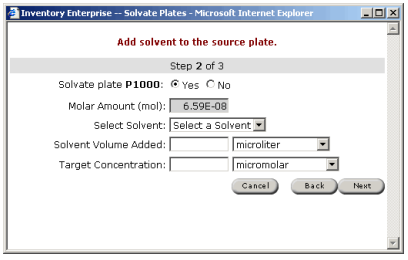
4. Click **Next**.

   The following window appears.



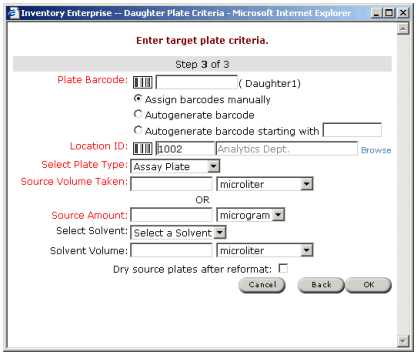
5. Select Yes if a solvent will be added to the plate during daughtering and click Next.
   - if Yes:

     The following screen appears



   a. Enter information about the solvent added.
   b. Click Next.

   The following screen appears:



6. Enter the appropriate information about the new plates.
7. Select the Dry Source Plates after Reformat checkbox if your source plates should return to their original state after the reformatting action is complete.
8. Click **OK**.

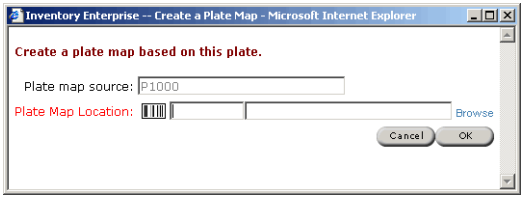
Create Plate Map

The Create Plate Map function allows a user to create a plate map based on the selected plate. Plate maps are virtual representations of plates that store the plate type, physical plate type, etc. of the plate, but most importantly the substance information for each well. Plate maps can only be stored in special plate map locations. New plates can be created from a plate map.

To create a plate map:

1. Search for or browse the plate you wish to create a plate map from.
2. Open the plate in the Details Frame.
3. Click **Create Plate Map**.

   The Create Plate Map dialog appears.



4. Enter the location for the new plate map.
5. Click **OK**.

Create a Plate Map Location

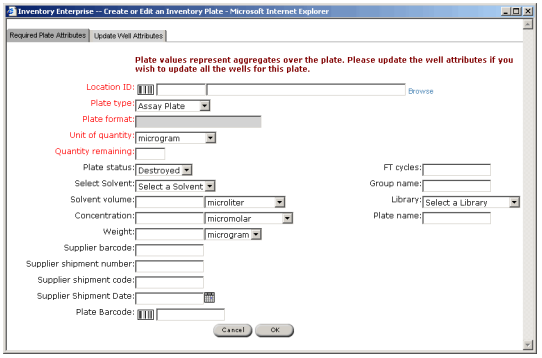
Plate Maps are stored in special plate map locations. To create a plate map location:

1. Click **New Location**.
2. Enter the appropriate information.
3. Select Plate Map from the **Location Type** listbox.
4. Click **OK**.

This new location is now ready to store plate maps created.

Edit Plate

The Edit Plate function allows editing of plate and well attributes. Plates are initially created in BioAssay so any attributes which can not be changed are greyed out (e.g. plate format).



NOTE: *Well attributes changed under this interface are applied to all of the wells in the plate.*

To edit a plate:

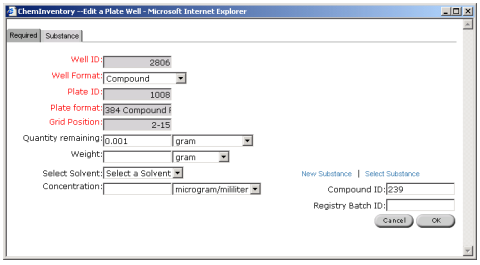
1. Search for or browse to the plate you wish to edit.
2. Open the plate in the Details Frame.
3. Click Edit Plate.
4. Make the appropriate edits to the given plate and well attributes.
5. Click **OK**.

Edit Well

The contents of an individual well can be edited by clicking Edit Well (from the Plate Well View dialog). This gives users the option of editing the attributes of one well at a time. If you would like to edit all wells uniformly, please see Edit Plate

To edit your well attributes:

1. Click **Edit Well**.
   Edit well page appears:



2. Enter the required information.
3. Enter any additional information.
4. Click **OK**.

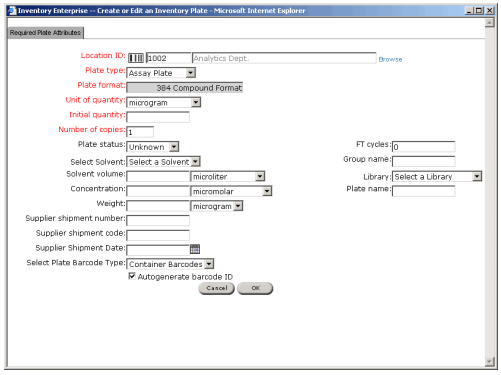
Copy Plate

The Copy Plate function allows a user to make a copy of an existing plate.

To copy a plate:

1. Search for or browse to the plate you wish to copy.
2. Open the plate in the Details Frame.
3. Click **Copy Plate**.

   The Copy Plate dialog appears.



4. Confirm the entered information.
5. Click **OK**.

   The plate is copied and a new plate is created in the specified location.

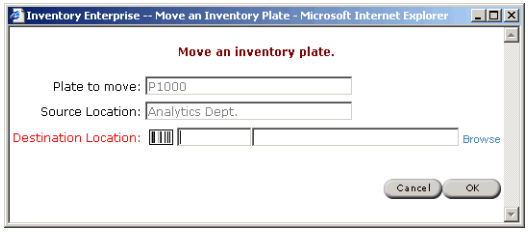
Move Plate

The Move Plate function allows a user to move a plate from one location to another.

To move a plate:

1. Search for or browse to the plate you wish to move.
2. Open the plate in the Details Frame.
3. Click **Move Plate**.

   The Move Plate dialog appears.



4. Enter the location you would like to move the selected plate to.
5. Click **OK**.

   The plate is moved to the new location.

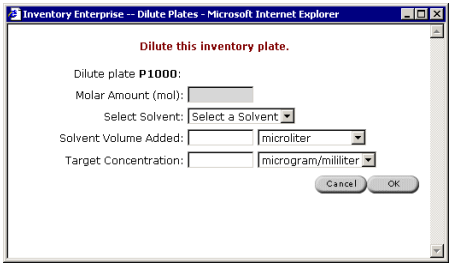
Dilute Plate

The Dilute Plate function allows a user to dilute an existing plate.

To dilute a plate:

1. Search for or browse to the plate you wish to dilute.
2. Open the plate in the Details Frame.
3. Click **Dilute Plate**.

   The Dilute Plate dialog appears:



4. Confirms the entered information.
5. Click **OK.**

   The plate is diluted.

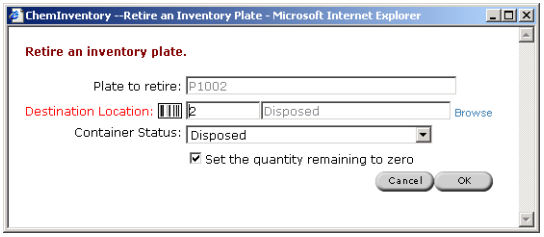
Retire Plate

The Retire Plate function allows retiring of a plate. Retiring is different than deleting because when a plate is retired the data is preserved, and the plate is placed in the Disposed location (unless specified otherwise), while when it is deleted, the data is lost permanently.

To retire a plate:

1. Search for or browse to the plate you wish to retire.
2. Open the plate in the Details Frame.
3. Click **Retire Plate**.

   The Retire Plate dialog appears.



4. Make any necessary changes.
5. Click **OK** to confirm you would like to retire the plate.

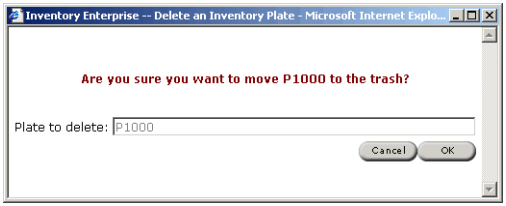
Delete Plate

The Delete Plate function allows deleting of plate and well attributes.

To delete a plate:

1. Search for or browse to the plate you wish to delete.
2. Open the plate in the Details Frame.
3. Click **Delete Plate**.

   The Delete Plate dialog appears.



4. Click **OK** to confirm you would like to delete the plate.

Plate Viewing Form Tabs

Summary Tab

The Summary Tab of the View Plate Frame lists all of the recorded attributes of the selected plate.

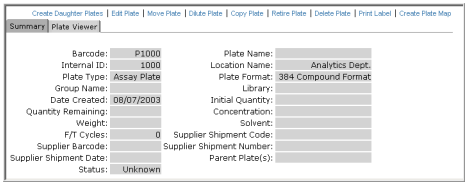
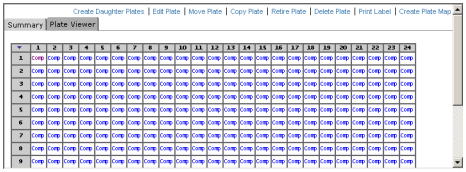


Plate Viewer Tab

The Plate Viewer Tab of the View Plate Frame displays a plate, in grid format, where each cell represents a well in the plate. Click on a well to view its contents.



Administration

Inventory provides an interface to some frequently used administrative tasks. This interface is not available to all users. If you feel you need access to this interface, please see your system administrator.

Managing Users and Roles

Please see "Manage Users and Roles" on page 192. for more information concerning managing users and roles.

Inventory Loader

Inventory Loader is an application to load information from ChemFinder databases into the Inventory Enterprise and Registration Enterprise databases.

ChemFinder databases may be created from many sources, most commonly SDFiles. SDFiles are the common currency of chemical information exchange today.

Inventory Loader may be run from any machine with access to the ChemOffice Enterprise application server.

To start loading compounds into Inventory Loader:

1. Start the Inventory Loader application. An introduction screen appears.

   NOTE: *You must start the Inventory Enterprise application before using InvLoader.*

2. Click **Next**.

3. Enter the name of the ChemOffice Enterprise application server, your username, and your password.

   NOTE: *The username you use here must have sufficient privileges to add compounds to and create plates in the Inventory Enterprise system. If you want to register those compounds, you must have sufficient privileges on the Registration System.*

4. Click **Next**.

   NOTE: *If an error message appears saying no plate locations or plate formats are defined, you will have to configure at least one location in Inventory Enterprise to hold plates, and/or create at least one valid plate format. Consult the documentation for Inventory Enterprise.*

5. Browse to the ChemFinder database you want to load.
6. Select whether you wish to load compounds into plates, or just load compounds.

Loading Compounds into Plates

1. Click **Next**.

   NOTE: *If an error message appears saying "Cannot open database", you may need to upgrade the database to the current ChemFinder version. To do this, simply open the database within ChemFinder and follow the prompts.*

2. If more than one table is defined in the ChemFinder db then you will have see a drop down list of table names. Select the table that holds the data to be mapped. Typically, the table name is "MolTable".

   A table appears.

   The table's left column displays the fields in Inventory Enterprise.

The table's second column lets you choose to either enter a default value, or to pick a field from your ChemFinder database to insert into that field. If you choose Use Default, you can enter that default value in the 3rd column. The default is to leave the field blank.

3. Enter information for one or more fields. The following is an explanation of the fields::

Field Name	Field Description
Well Coordinate	the address of the well on the plate, e.g. ìA02î or ìH12î
Row	the row of the well on the plate, either in letter or number format.
Column	the column of the well on the plate, in number format.
Reg Number	the CambridgeSoft registration number of the compound. You will generally leave this blank unless you are importing data from the Registration System into Inventory Enterprise.
Batch Number	the CambridgeSoft registration batch number of the compound. You will generally leave this blank unless you are importing data from the Registration System into Inventory Enterprise.
Barcode	the barcode of the plate. This is the barcode that will be used in Inventory Enterprise. If you leave this blank, Inventory Enterprise will assign new barcodes to the plates according to a scheme which you set up in a later screen.
Compound Name	an identifier for the compound.
CAS Number	the CAS number for the compound. Many screening libraries do not include CAS numbers.
ChemACX ID	the CambridgeSoft ChemACX id for the compound. Many screening libraries do not include ChemACX numbers.
Supplier	the supplier of the plate.
Supplier Barcode	the barcode assigned by the supplier to the plate. If you will be re-barcoding the plates upon import, you may assign the original supplier barcode to this field for tracking purposes.

Field Name	Field Description
Supplier Compound ID	supplier's identifier for the compound

The remainder of the fields should be self-explanatory.

NOTE: *You do not have to fill in all fields.*

Some notes on filling in this grid:

a. Either Well Coordinate or Row AND Column may be mapped to ChemFinder fields. It is not necessary to map both, and you don't have to do either, but if you map Row, you must map Column. If you map Well Coordinate, you shouldn't map Row or Column.

b. If your plates have identifiers, you should map that identifier to either Barcode, Supplier Barcode, or (if the plate identifier is numeric) to Supplier Plate Number. If you don't, you will receive a warning, and the compounds will probably not be plated according to your expectations.

c. If you map only Supplier Barcode, Supplier Plate Number, or Barcode, and you do NOT map Well Coordinate or Row AND Column, the compounds will probably not be plated correctly.

d. If you do not map ANY of: Supplier Barcode, Supplier Plate Number, or Barcode, Well Coordinate or Row AND Column, then the compounds will be put into plates in the order that they are encountered in the file. This is probably a rare scenario.

4. Click **Next**.

5. Choose the location where you want to create the plates.

6. Choose the plate format you wish to use. The plate format describes the size of the plate (96, 384 well), as well as the layout of the plates ñ where compounds are located, which wells are empty.

7. Choose the plate type you wish to create. The Plate Types list is an arbitrary list of types. The number of compounds being imported and the number of plates to be created appears at the bottom of this screen. This is a good place to check if the results are what you expected.

8. Click **Next**.

9. Choose the library to assign the plates to.

   This is an arbitrary list of classifications.

10. Enter how you want Inventory Enterprise to barcode your plates.

NOTE: *If you have mapped a ChemFinder field to Barcode in a previous screen, the Barcode section of this screen will be grayed out, indicating that the barcodes from your file will be used.*

11. Assign a starting group number for your plates if desired. This is rarely used.

12. Click **Next**.

13. If you want to register these compounds into the Registration System, check the box.

    Inventory Loader will validate your login against the registration system.

    If it succeeds, a grid containing the options for registering the compounds appears. You can choose what project, prefix and sequence to register the compounds with, as well as other options. For more documentation on what these choices mean, consult the Registration System documentation.

    a. If you want to assign fields to be filled in for the compound when it is registered, click Registration Options

b. A dialog appears, with a table similar to the one you used to assign inventory fields. Here you can choose default values or SDFile fields to assign to registration system fields. **NOTE**: Please note that the fields here are named as they are in the database, not as they are in the Registration System interface. The mapping between display name and database name may be found in C:\inetpub\wwwroot\chemoffice\chem_reg\config\cfserver.ini

14. Click **Next**.
15. If you would like to save a log of the plates that were created in XML format, check the box and specify a path.

    This is usually not necessary unless you are experiencing problems.
16. Click **Next**.
17. Click **Finish** and the plates are imported. Each plate may take a while, as compounds are duplicate-checked and indexed for searching.

Import Compounds Only

1. A screen of inventory fields that can be mapped to ChemFinder fields appears. See "Loading Compounds into Plates" on page 147.
2. Click **Next**.
3. Click **Finish**.

Inventory Tasks

The following tasks are available to users with the correct administrative privileges. If you do not have access to something you need access to, please see your system administrator: "Tasks" on page 128..

Search

For more detail please "Searching Inventory Enterprise" on page 115.

New Location

For more details please "New Location" on page 125.

Edit Location

For more details please "Edit Location" on page 126.

Move Location

For more details please "Move Location" on page 126.

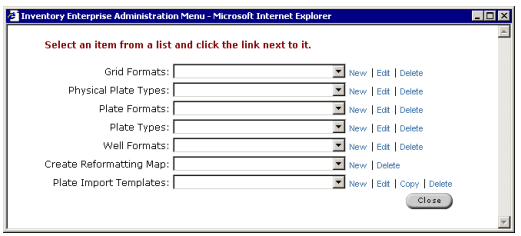
Delete Location

For more details please "Delete Location" on page 127.

Plate Settings

The plate settings Admin Task allows you to create, edit, delete and copy plate settings for use when creating and reformatting plates. The settings include:

- Grid Formats
- Physical Plate Types
- Plate Formats
- Plate Types
- Well Formats
- Create Reformatting Plates
- Plate Import Templates



Create New

To create a new plate setting (regardless of type):

1. Click the **New** link to the right of the plate setting you would like to create.
2. Enter the desired information.

NOTE: *Fields highlighted in Red are required.*

3. Click **OK**.

Edit

To edit a plate setting (regardless of type):

1. Select the plate setting you want to edit from the appropriate listbox.
2. Click the **Edit** link to the right of the plate setting you would like to edit.
3. Enter the desired information.
4. Fields highlighted in Red are required.
5. Click **OK**.

Delete

To delete a plate setting (regardless of type):

1. Select the plate setting you want to delete from the appropriate listbox.
2. Click the **Delete** link to the right of the plate setting you would like to delete.
3. Click **OK**.

Copy

To copy a plate setting (regardless of type):

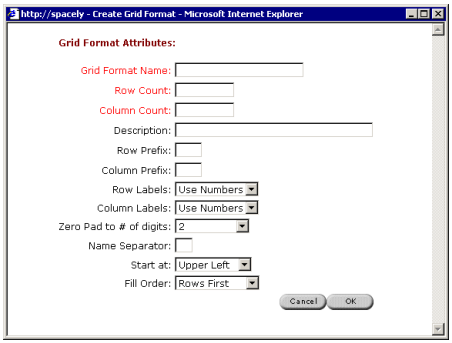
1. Select the plate setting you want to copy from the appropriate listbox.
2. Click the Copy link to the right of the plate setting you would like to copy.

NOTE: *Fields highlighted in Red are required.*

3. Click **OK**.

Grid Formats

The grid format allows you to create a grid of plate. This plate settings allows user to create a grid of choices, user can enter following details in the interface.



Physical Plate Types

Physical plate type allows you to create a plate type. This plate settings allows user to create a physical plate of different well capacities, user can enter following details in the interface.

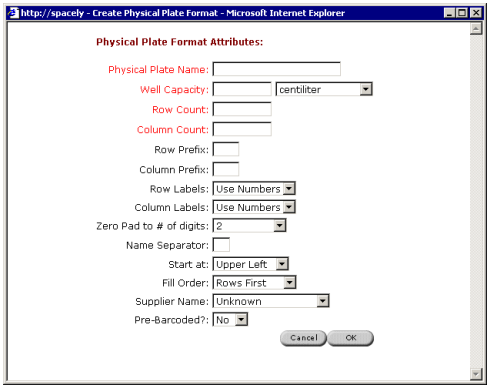


Plate Formats

Plate format assigns a new attribute to an existing physical plate. User can enter following details in the interface.

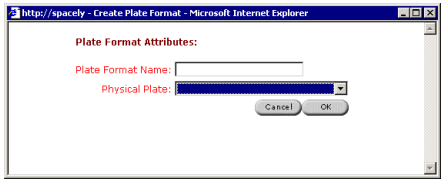
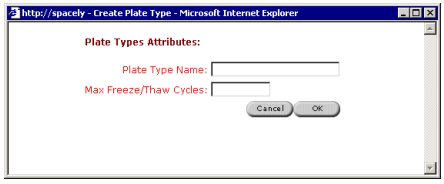


Plate Types

It allows you to create/edit plate types. By default system provides following types:

- Assay Plate
- Master Plate
- Replicate Plate
- Source Plate
- Working Plate

NOTE: *These default plate types are editable.*

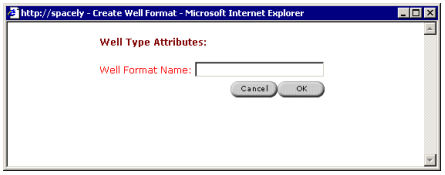


Well Formats

It allows you to create/edit well format. By default system provides following formats:

- Compound
- Empty
- Negative Control
- Positive Control

NOTE: *These default well formats are editable.*

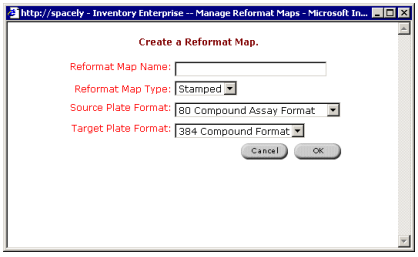


Create Reformatting Map

This feature allows you to select the positioning of plates in the well of the target plate. You can create reformat map of only those plates which has same plate formats and plate types.

User can select either “Stamped” or “Dithered” from the Reformat Map Type drop down list.

If “Stamped” selected following screen appears:



If “Dithered” selected following screen appears:

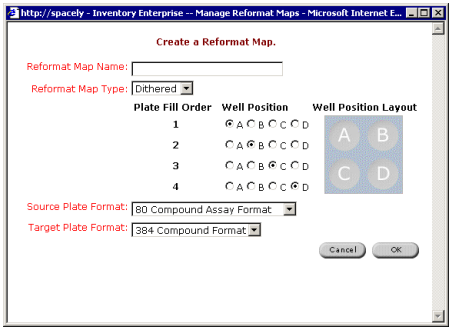
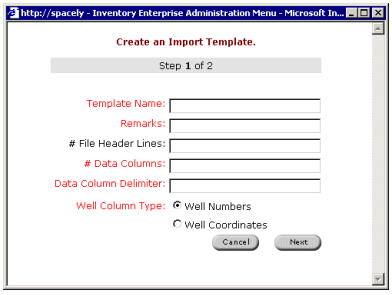


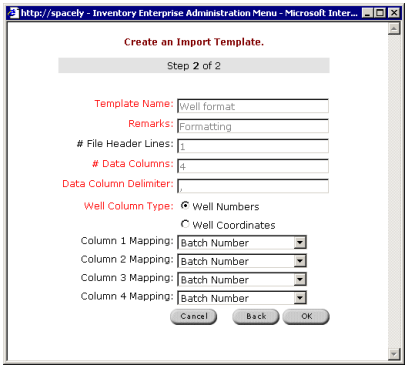
Plate Import Templates

This feature allows user to create an import template of any choices. As import template created, user can select this template to import the text file. For more information about the contents and format of the listed import templates.

Upon clicking New link following page appears:



Enter the details to create import template and click Next button.



Enter the details of Column Mapping and click OK button.

Change Password

Users always have the option to change their password.

To change your password:

1. From the Home page, click **Change Password**.

   The Change Password window opens.

2. Enter the new password in the **New Password** textbox.
3. Enter the new password again in the **Confirm New Password** textbox.
4. Click **OK**.

Manage Users

For more details please “Manage Users and Roles” on page 192.

Manager Roles

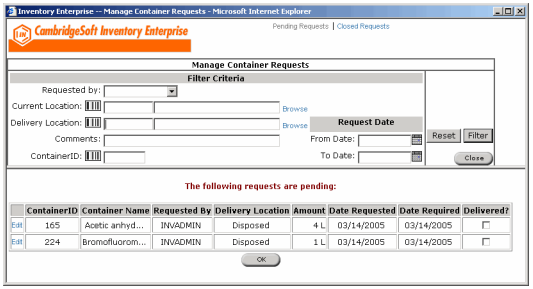
For more details please “Manage Users and Roles” on page 192.

Manage Container Requests

The Manage Container Requests tool lists all container requests that have been made. Requests for samples can be viewed under the Manage Sample Requests link.

This tool is helpful for the person on site responsible for fulfilling requests.

The requests can be filtered in the upper frame. Results from the filter are displayed in the bottom frame. By default, the window opens with no filtering (displays all open requests).



To close a request:

1. Select the checkbox in the **Delivered?** column for the request.
2. Click **OK**.

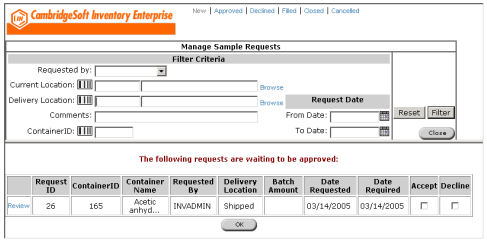
To view all closed requests:

1. Click the **Closed Requests** link in the upper frame.
2. All closed requests are listed. These requests can be filtered using the top frame.
3. If you would like to Undo the Delivered action and return a request to the open list, click **Undo**.
4. Click **OK**.

Manage Sample Requests

The Manage Sample Requests tool lists all requests for samples that have been made. This tool is helpful for the person on site responsible for fulfilling requests. Requests for containers can be viewed under the Manage Container Requests link.

The list of requests can be filtered in the upper frame. Results from the filter are displayed in the bottom frame. By default, the window opens with no filtering. Click the Filter button with no input criteria for a list of all requests.



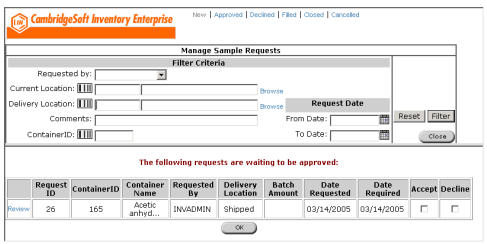
Sample requests have 6 states:

- New
- Approved
- Declined
- Filled
- Closed
- Cancelled

The links at the top of the Manage Sample Requests window allows you to easily view the type of requests you want to see. The actions which can be taken on a request is determined by the state that request is in.

New Sample Requests

New sample requests are requests which have been submitted by a user but not yet approved for disbursement by the appropriate personnel. The following actions can be taken on a request with the status New:



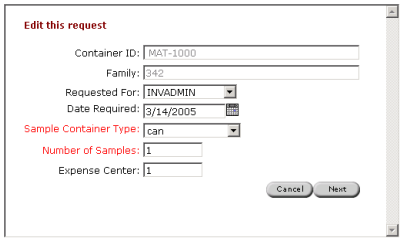
Review a Request:

A Review link found to the left of each request listed in the Sample Requests dialog allows users to review details and edit them if necessary.

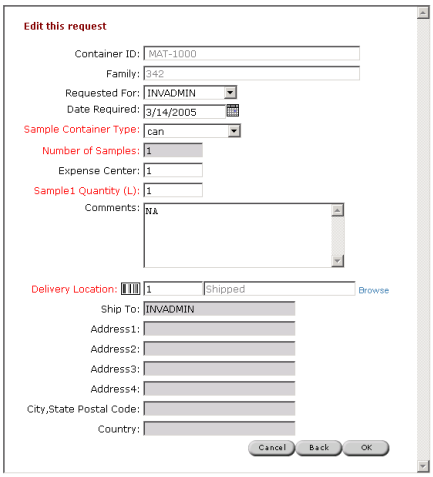
To review a sample request:

1. Click **Review** to the left of the request to review.

   The Edit Request dialog appears.



2. Change the number of samples, if desired, and click **Next**.



3. Edit additional details if necessary.

NOTE: *Addresses are linked to the Delivery Location selected. Editing the address for that location will be a global change for all requests being delivered to that location.*

4. Click **OK**.

Accept a Request

Accepting a request changes the status of that request to approved. This indicates the request will be fulfilled.

To accept a request:

1. Select the **Accept** checkbox to the right of the appropriate request.
2. Click **OK**.

   The request details will now appear under the Approved Requests.

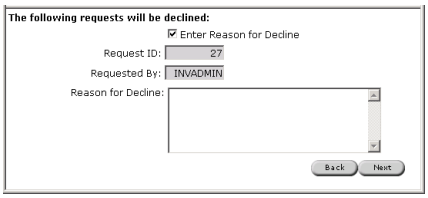
Decline a Request

Declining a request changes the status of that request to declined. This indicates the request will not be fulfilled as requested.

To decline a request:

1. Select the **Decline** checkbox to the right of the appropriate request.
2. Click **OK**.

   A dialog to enter a reason for decline appears.



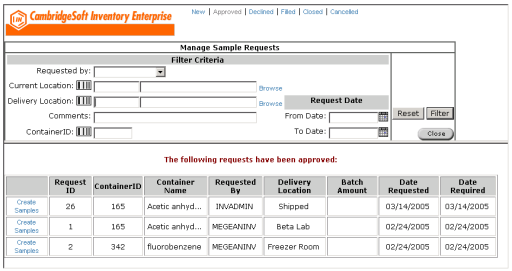
3. Enter a reason for decline.

NOTE: *If the Apply Reason to all checkbox is selected, the reason will be applied to all of the requests listed.*

4. Click **OK**.
5. The request details will now appear under the Declined Requests.

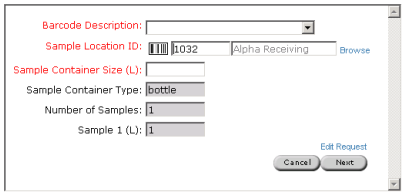
Approved Sample Requests

Approved sample requests are requests which have been submitted and approved, but not yet fulfilled. Users can fulfill these requests by clicking on the Create Samples link to the left of the request.



To fulfill a request:

1. Click **Create Samples** to the left of the appropriate request.
   The Create Batch Sample screen appears.



2. Order the container in the batch by the order in which samples should be taken.

NOTE: *If a sample cannot be fulfilled in the current container that sample will be taken from the next container.*

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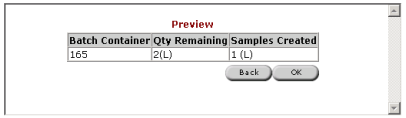
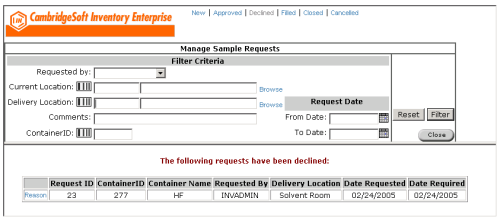
3. Select a location where the new container should be placed in the Sample Location ID field.
4. Enter the size of the new containers.
5. Click **Next**.
   The preview screen appears.



6. The preview screen displays a summary of the action to be taken. If the preview is correct, click OK.
7. The samples are created and the request status is changed to Filled.

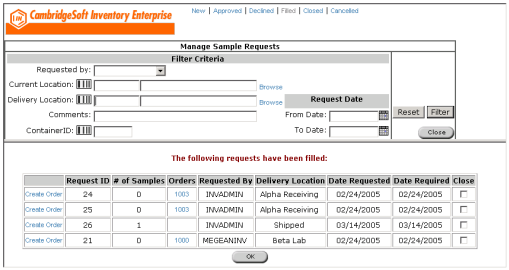
Declined Sample Requests

Declined sample requests are requests which have been submitted by a user but have been declined. These requests are, in a sense, closed but were never fulfilled. Users can view the reason for decline from the Manage Sample Requests dialog by clicking on the Reason link to the left of the request.



Filled Sample Requests

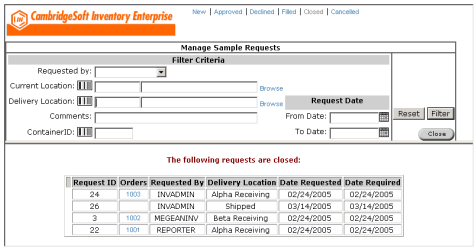
Filled sample requests are requests which have been submitted and approved and the samples have been created. Users can create orders and ship those orders from this interface.



The orders column lists all orders, which contains containers linked to the request.

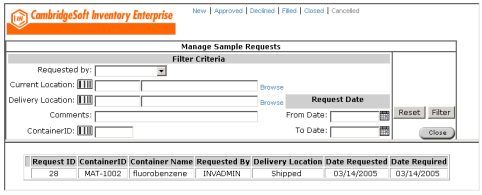
Closed Sample Requests

Closed sample requests are requests which have been approved by a user but have been closed. These requests are, in a sense, closed but were fulfilled by the user. User can only view closed request but not able to do any further operations on these requests.



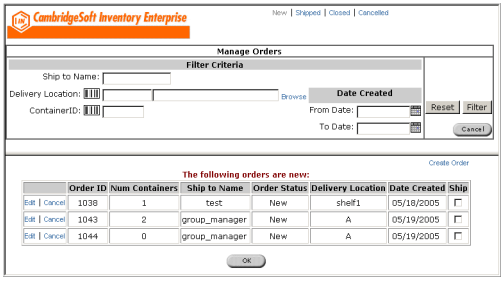
Cancelled Sample Requests

Cancelled sample request are request which have been submitted by a user but have been cancelled. These request are, in a sense, closed but were never fulfilled. User can only view the details of the sample.



Manage Orders

The Manage Orders screen allows you to view all of the orders in the system. Orders have 3 states: New, Shipped, and Closed. Toggle between the list of new and shipped orders using the new and shipped links at the top of the dialog.



Click the **Edit** link to edit the order or click Create Order to create a new order.

To ship an order:

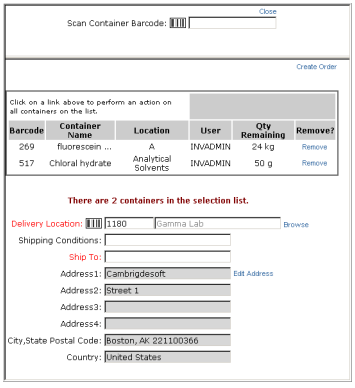
1. Select the **Ship** checkbox to the right of the order.
2. Click **OK**.

Create an Order

The Create Order link is accessed from the Filled Sample Requests screen or from the Manage Orders screen.

To Create an Order:

1. Click **Create Order**.
   The Create Order dialog appears.



2. Scan in the containers in the order.
3. Enter the delivery location.
4. Click **Save Order**.

Receive an Order

Receiving an order will move the containers in the order to their destination location and update the container status.

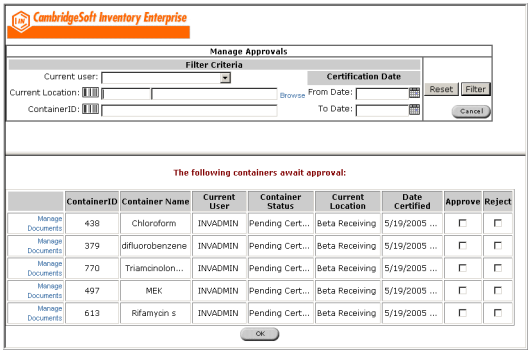
To receive an order:

1. Scan in one of the containers in the order.
   A list of all of the containers in the order appears.
2. Continue to scan in all of the container in the order.
3. After all of the containers are scanned in, click **Receive Containers**.

Manage Approvals

The Manage Approvals tool lists all container which have been certified using the Certify Container function, but have not yet been approved.

The listed containers can be filtered in the upper frame. Results from the filter are displayed in the bottom frame. By default, the window opens with no filtering (displays all containers to be approved).



Viewing Linked Documents

Documents related to the container are linked to the container record.

Users can view the linked documents by clicking Manage Document:

1. Click **Manage Documents** to the left of the appropriate container.
   The Manage Documents dialog appears.
2. Click the link for the document you would like to view.
   The document appears in a web browser for your review.

Approving a Container

Approving a container changes the container's status to the designated approved status, making the container available to be used.

To approve a container:

1. Select the **Approve** checkbox to the right of the appropriate container.
2. Click **OK**.
   The status of the container is updated (removing the container from the Manage Approvals interface) and the approval date is stored in the database.

Rejecting a Container

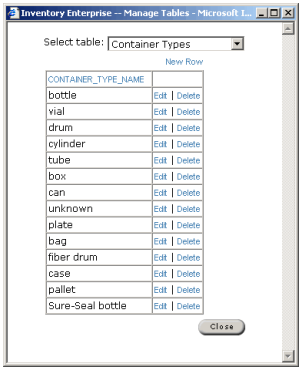
If the paperwork or test results are not satisfactory, the certification of the container can be rejected. Rejecting a container sets the container status to the default container status and clears the certification date.

To reject a container:

1. Select the **Reject** checkbox to the right of the appropriate container.
2. Click **OK**.
3. The status of the container is updated (removing the container from the Manage Approvals interface) and the certification date is cleared.

Manage Tables

The Manage Tables interface allows administrators to add, edit, and delete the contents of any table in Inventory Enterprise. This is especially helpful to add/change the choices in pick lists throughout the Inventory Enterprise forms.



New Row

To create a new row in one of the Inventory Enterprise tables:

1. Select the table to add to from the **Select Table** listbox.
   The table appears.
2. Click the **New Row** link.
3. Enter the desired information.
4. Click **OK**.
   The row is added to the table.

Edit

To edit a row in one of the Inventory Enterprise tables:

1. Select the table which contains the row to be edited from the **Select Table** listbox.
   The table appears.
2. Click the **Edit** link to the right of the row to be edited.
3. Enter the desired information.
4. Click **OK**.
   The row is updated in the table.

Delete

To delete a row in one of the Inventory Enterprise tables:

1. Select the table which contains the row to be deleted from the **Select Table** listbox.
   The table appears.
2. Click the **Delete** link to the right of the row to be deleted.
3. Enter the desired information.
4. Click **OK**.
   The row is deleted from the table.

Analyze Audit Trail

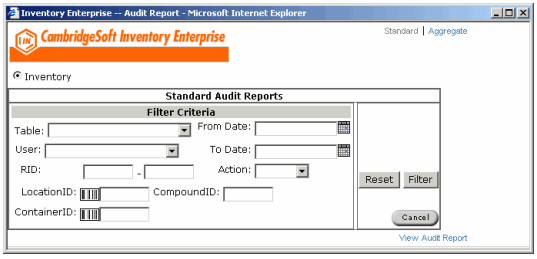
The Analyze Audit Trail tool allows users to filter and view actions taken on containers, locations, compounds, or links.

Standard Audit Report

The Standard Audit Report allows users to filter by Table, User, RID, LocationID, ContianerID, Date, Action, or CompoundID.

To filter and display the report:

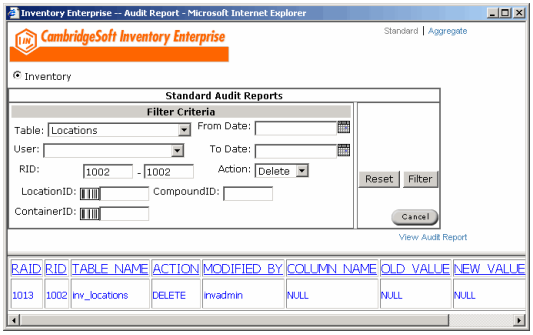
1. Click **Analyze Audit Trail** and make sure the Standard Link, in the upper frame, is chosen.



2. Enter your filter criteria.
   - Table – the name of table (Containers | Locations | Compounds | Links)

- User – the user who performed the action
- RID – the action ID number (entered as a range)
- LocationID – the location ID
- ContainerID – the container ID
- From Date – actions made after this date
- To Date – actions made before this date
- Action – type of SQL action (Update | Delete | Insert)
- CompoundID – the compound ID

3. Click **Filter**.



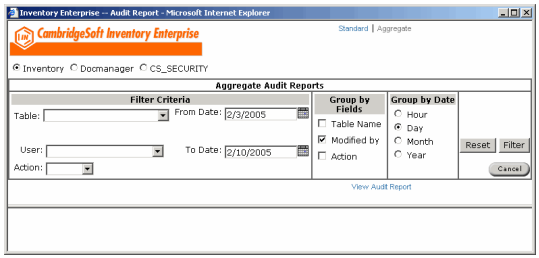
The results are displayed in the lower frame.

Aggregate Audit Report

The Aggregate Audit Report allows users to filter by Table, User, Date, or Action. This report does not give every step in the audit trail, like the Standard Report, but instead provides a summary of actions.

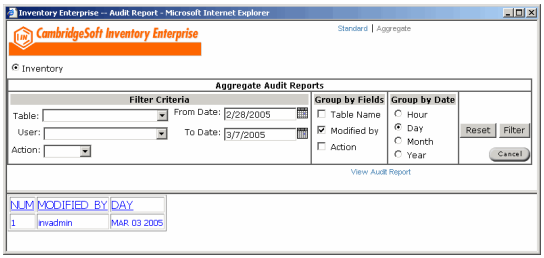
To filter and display the report:

1. Click **Analyze Audit Trail** and make sure the Aggregate Link, in the upper frame, is chosen.



2. Enter your filter criteria.
   - Table – the name of table (Containers | Locations | Compounds | Links)
   - User – the user who performed the action
   - From Date – actions made after this date
- To Date – actions made before this date
- Action – type of SQL action (Update | Delete | Insert)
3. Select Fields to display and group by selecting the checkboxes next to Table Name, Modified By, an Action.
4. Indicate how date dependant data should be grouped by selecting the appropriate radio button next to Hour, Day, Month or Year.
5. Click **Filter**.

   The results are displayed in the lower frame.



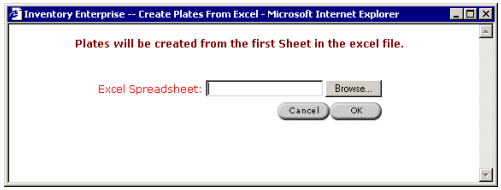
Create Plates from Excel

Excel files are a good way of clearly indicating in your inventory what has happened to the contents of plates. CambridgeSoft supports the facility to create plates from excel file.

To import a excel file into Inventory Enterprise:

1. Click **Create Plates from Excel** on the **Tasks** menu.

   The Excel File Import dialog appears:



2. Browse to the excel file being imported.
3. Click **OK**.

   The plates are created in the indicated location.

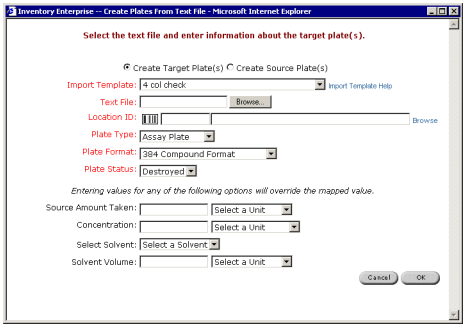
Create Plates from Text File

Text File are a good way of clearly indicating in your inventory what has happened to the contents of plates. CambridgeSoft supports the use of a number of formats. If your format is not currently an option for importing, it is necessary to either perform some post processing on your file to match one of the default formats or contact technical support for guidance.

To import a text file into Inventory Enterprise:

1. Click **Create Plates from Text File** on the **Tasks** menu.

   The Text File Import dialog appears.



2. Select Target or Source Plate.

Target Plates	Target plates are assumed to be created from the contents of existing plates in the inventory.
Source Plates	Source Plates are new plates created with new contents not previously found in the inventory. You cannot insert structures into plates when selecting this option.

3. Select an import template from the list provided.
4. Browse to the text file being imported.
5. Enter additional information about the new plates.
6. Click **OK**.

   The plates are created in the indicated location

Custom Reports

System administrators have the option to create custom reports for Inventory Enterprise. These reports pull information from the Inventory Enterprise database and display it in a useful form.

To run a custom report:

1. Click **Custom Reports** (from the Tasks dialog).
2. Select the name of the report you would like to run form the **Report Layout** listbox.
3. Select a report format from the **Report Format** listbox.
4. Click **Go**.