Contents

Inventory Enterprise User Guide

About this guide

Welcome to the Inventory Enterprise 11.0 User Guide. Inside this guide, you will find a full description of Inventory Enterprise, its features, and complete instructions on how to use them. This guide is available in print (this file) and Web-based format.

Inventory Enterprise 11.0 is a ChemBioOffice Enterprise application that lets you track the data associated with the reagents procured or produced by chemical and pharmaceutical research centers. It keeps track of all the data from the procurement or initial production of the reagents to the depletion or disposal of the reagents.

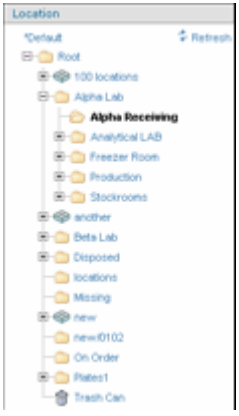
The following figure shows the home page of Inventory Enterprise 11.0 and also indicates the various frames:

Figure 1.1 A) Current Location frame; B) Container List frame; C) Location Tree frame; D) Container Details frame.

Terminology

Location

The term, location, refers to a physical location, such as shelf or refrigerator where containers or plates containing reagents are stored. Locations can be nested within other locations to form a hierarchical structure, as shown in this figure:



The hierarchical structure shown in the preceding figure is called the location tree. The folders displayed in the location tree represent the locations. You can access the desired location by navigating through the various folders in the location tree.

For a complete list of location fields, see “Inventory Enterprise 11.0 form fields” on page 114.

NOTE: The Inventory Application supports only English characters for location, container, and substance names.

Container

The term, container, refers to a physical entity that can store the chemical substances. You can create different types of containers in Inventory Enterprise 11.0, such as tube, bottle, box, vial, and cylinder. Unlike physical containers, you can associate only single primary chemical substances with an Inventory container. You can associate secondary chemical substances, such as solvent, with the container using the additional container fields. For a complete list of container fields, see “Inventory Enterprise 11.0 form fields” on page 114.

You can also associate Registration Enterprise or ChemACX substances with the Inventory containers, if Inventory Enterprise 11.0 is integrated with Registration Enterprise or ChemACX applications.

Substance

The term, substance, refers to a single and pure chemical compound that can be used by the chemical and pharmaceutical research centers in their experiments and researches. In Inventory Enterprise 11.0, the chemical structure of a substance is represented by a two-dimensional drawing.

Inventory Enterprise 11.0 helps the chemical and pharmaceutical research centers in maintaining and managing the substances.

Inventory Enterprise 11.0 stores the substances in its own database. It also ensures that a substance is not duplicated and is stored only once. This is achieved by ensuring that the unique fields, such as name and chemical structure of the substance are not duplicated.

For a complete list of substance fields, see “Inventory Enterprise 11.0 form fields” on page 114.

Searching Inventory Enterprise

The searching feature enables you to locate a substance, container, or plate stored in the Inventory Enterprise 11.0 database.

In Inventory Enterprise 11.0, different types of users can perform different types of searches according to their requirements. For example, chemists need to search Inventory Enterprise 11.0 on the basis of attributes, such as chemical structure, substance name, and CAS number. They can perform the search with the help of the Substructure search. Similarly, stock room or receiving room personnel can use the Advanced search feature to search Inventory Enterprise 11.0 on the basis of attributes, such as container and location barcode.

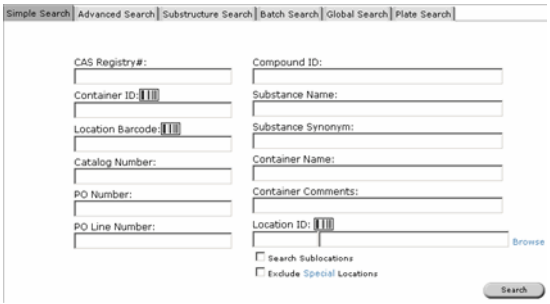
Simple search

Simple search lets you search a container on the basis of the key fields of the container. You can use Simple search to search a container on the basis of various fields, such as CAS Registry, Container ID, Location Barcode, Catalog Number, PO Number, PO Line number, Substance Name, Substance Synonym, Container Name, Container Comments, and Location ID.

To perform Simple search on Inventory Enterprise 11.0:

1. Click the **Search** link within the **Inventory Enterprise** section in the home page of

ChemBioOffice Enterprise. The following window appears as:



NOTE: If you had performed any other search earlier, the corresponding search tab will be selected by default. In this case, you need to click the **Simple Search** *tab to display the preceding window. You can also perform searches by clicking the* **Search** *link within the Current Location frame in the Container Management area.*

NOTE: The number of tabs visible in the preceding window depends on the configuration settings.

2. Enter the information on the basis of which you want to search Inventory Enterprise 11.0.
3. Select the **Search Sublocations** check box if you want to perform search on the location specified in the **Location ID** field as well as on the child locations of the specified location.
4. Select the **Exclude Special Locations** check box if you want to exclude the special locations, such as Trash Can, Disposed, and On Order from the search. You can select the locations to be excluded by clicking the Special link.
5. Click the **Search** button. A list of containers matching the search criteria specified in the **Simple Search** tab window appears.

Viewing Simple search results

The result of the Simple search is a list of containers that match the search criteria specified in the Simple Search tab window. You can click the desired container in the result list to gather more information about the container. When you click a container in the search result list, the Container Management area displaying the details of the container, appears as:

The various frames of the Container Management area that allow you to gather information about the containers are:

- Location Tree frame (Left frame): Provides information about the location of the container.
- Container List frame (Upper right frame): Provides information about the key attributes of the container, such as container name and container ID.
- Container Details frame (Lower right frame): Provides detailed information about the container. You can gather information about all the attributes of the container through the Container Details frame.

Advanced search

Advanced search lets you search a container on the basis of any field of the container. You can use the Advanced search feature to search a container on the basis of various fields, such as

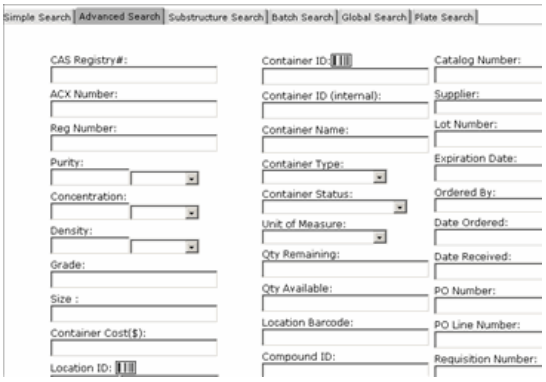
CAS Registry, ACX Number, Reg Number, Purity, Concentration, Density, Grade, Size, Container Cost, Location ID, Container ID (barcode), Container ID (internal), Container Name, Container Type, Container Status, Unit of Measure, Qty Remain, Qty Available, Location Barcode, Compound Type, Catalog number, Supplier, Lot Number, Expiration Date, Ordered By, Date Ordered, Date Received, PO Number, PO Line Number, Requisition Number, Owner, and Current User.

The Advanced search concentrates more on the container fields as opposed to the substance fields. To perform an Advanced search on Inventory Enterprise 11.0:

1. Click the **Search** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. A window containing various search tabs, such as Simple Search, Advanced Search, Substructure Search, Batch Search, Global Search, and Plate Search appears.

   NOTE: You can also access the window containing the search tabs by clicking the Search link within the Current Location frame in the Container Management area.

2. Click the **Advanced Search** tab. The **Advanced Search** tab window appears as:



   NOTE: The number of tabs visible in the preceding window depends on the configuration settings.

3. Enter the criteria on the basis of which you want to search Inventory Enterprise 11.0.
4. Select the **Search Sublocations** check box if you want to perform search on the location specified in the **Location ID** field as well as on the child locations of the location.
5. Select the **Exclude Special Locations** check box if you want to exclude the special locations, such as Trash Can, Disposed, and On Order, from the search. You can select the locations to be excluded by clicking the Special link.
6. Click the **Search** button. A list of containers matching the search criteria specified in the **Advanced Search** tab window is displayed.

You can view the results of the Advanced search in the similar way as the results of the Simple search are viewed. For information about viewing results of the simple search, see “Viewing Simple search results” on page 3.

Substructure search

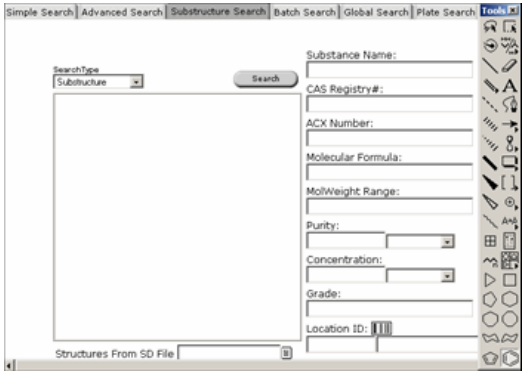
In addition to the Advanced search fields, you can use the Substructure search feature to search Inventory Enterprise 11.0 on the basis of the Substructure, Substance Name, Molecular Formula, and MolWeight Range fields.

To perform a Substructure search in Inventory Enterprise 11.0:

1. Click the **Search** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. A window containing various search tabs, such as Simple Search, Advanced Search, Substructure Search, Batch Search, Global Search, and Plate Search, is displayed.

   NOTE: The window containing the search tabs can also be accessed by clicking the Search link within the Current Location frame in the Container Management area.

2. Click the **Substructure Search** tab. The **Substructure Search** tab window appears as:



   NOTE: The number of tabs visible in the preceding window depends on the configuration settings.

3. Draw the substructure of a substance within the available drawing area in the **Substructure Search** tab window and specify the appropriate substructure search type in the **SearchType** drop down list. The **SearchType** drop down list can take different values, which are:
   - Substructure
   - Full Structure
   - Exact Structure
   - Tanimoto Similarity
4. Enter the additional criteria on the basis of which you want to search the container.
5. Select the **Search Sublocations** check box if you want to perform search on the location specified in the **Location ID** field as well as on the child locations of the location.
6. Select the **Exclude Special Locations** check box if you want to exclude the special locations, such as Trash Can, Disposed, and On Order, from the search. To select the locations to be excluded, click the Special link.
7. Select the **Group results by chemical structure** check box if you want the search results to be grouped on the basis of the chemical structure of the substances.
8. Click the **Search** button. A list of substances matching the search criteria specified in the **Substructure Search** tab window appears.

Viewing Substructure search results

If the substructure search is performed with the Group results by chemical structure check box selected, the result of the search is a list of substances. You can view details of a particular substance in the search result list using various tabs, which are:

- Zoom In: Lets you zoom in on the structure of the substance.
- Names: Lets you gather information about the various synonyms of the substance.

- Details: Allows you gather information about the container associated with the substance.
- Mark: Lets you mark the substance so that you can easily locate the substance in Inventory Enterprise 11.0 later, without creating a search query for it again.

NOTE: You can view or unmark the marked records by selecting Show Marked or Clear Marked menu item from the Marked Hits menu displayed in the window containing the search results.

However, if the Group results by chemical structure check box is not selected when the substructure search is performed, the result of the search is a list of containers. You can view details of a container displayed in the result list of substructure search in the similar manner as the details of a container in the simple search results are viewed. For information about viewing the details of a container in the simple search results, see "Viewing Simple search results" on page 3.

Batch search

Batch search lets you search containers based on the batching fields. Also, you can narrow the search by specifying additional criteria. For example, you can draw a structure of Methyl Benzene and specify that the result should contain Methyl Benzene with 'Available' status. After performing a Batch search, you can perform the following operations:

- Request a Sample
- Reserve a Sample

The following figure shows the Batch Search tab window:

NOTE: The search fields displayed in the preceding figure are the default fields. To display more search fields, you need to configure custom batching fields by editing the invconfig.ini file. For more information on configuring custom batching fields. Consult the administrator.

To search for a container:

1. Enter the search criteria in the **Batch Search** tab window.
2. Click the **Search** button. The search result appears.

Global search

Global search enables you to search a substance in Inventory Enterprise 11.0 as well as in Registration Enterprise and ChemACX. You

can search all these applications simultaneously using the global search.

NOTE: Global search can be performed on the Registration Enterprise and ChemACX applications only if the system running Inventory Enterprise 11.0 is installed and configured with these applications.

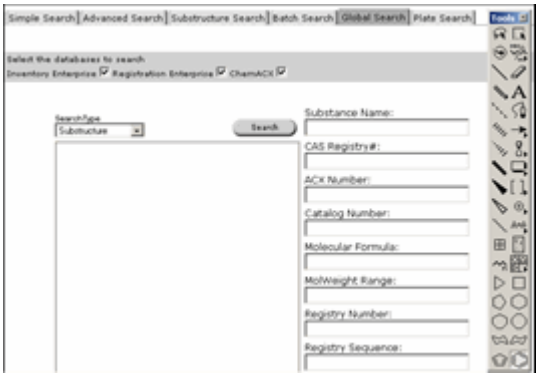
Global search lets you search a substance on the basis of the Substructure, Substance Name, CAS Registry, ACX Number, Catalog Number, Molecular Formula, MolWeight Range, Registry Number, Registry Sequence, Reg Alternate IDs, Salt Name, and Salt Equivalents fields.

To perform global search on Inventory Enterprise 11.0:

1. Click the **Search** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. A window containing various search tabs, such as Simple Search, Advanced Search, Substructure Search, Batch Search, Global Search, and Plate Search is displayed.

   NOTE: You can also access the window containing the search tabs by clicking the Search link within the Current Location frame in the Container Management area.

2. Click the **Global Search** tab. The **Global Search** tab window appears as:



   NOTE: The number of tabs visible in the preceding window depends on the configuration settings.

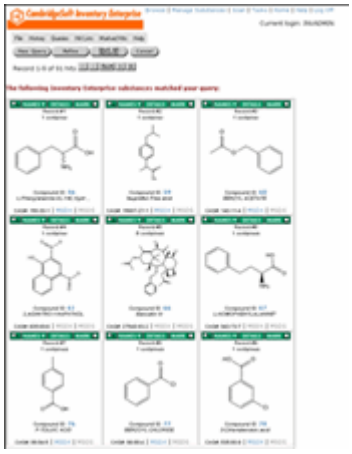
   NOTE: You can also access the Global Search tab window by clicking the Global Search link within the Inventory Enterprise section in the home page of ChemBioOffice Enterprise.

3. Select the check boxes next to the applications that are to be searched, such as Inventory Enterprise 11.0, ChemReg, and ChemACX.
4. Enter the information on the basis of which you want to search the selected applications.
5. Click the **Search** button. A list of substances matching the search criteria specified in the **Global Search** tab window appears.

NOTE: Global search does not return substances that match the specified criteria, but are not associated with any product.

Viewing Global search results

In the global search, the results from different applications are stored in different lists. For example, Registration Enterprise, Inventory Enterprise, and ChemACX substances that match the search criteria specified in the Global Search tab window are stored in separate lists. You can view the result list of a particular application by clicking the radio button next to the application, as shown in this figure:



You can view details of the substances in the search result list of Inventory Enterprise 11.0 using various tabs, which are:

- Zoom In: Lets you zoom in on the structure of the substance.
- Names: Lets you gather information about the various synonyms of the substance.
- Details: Lets you gather information about the container associated with the substance.
- Mark: Lets you mark the substance so that you can easily locate the substance in Inventory Enterprise 11.0 later, without creating a search query for it again.

NOTE: You can view or unmark the marked records by selecting Show Marked or Clear Marked menu item from the Marked Hits menu displayed in the window containing the search results.

Plate search

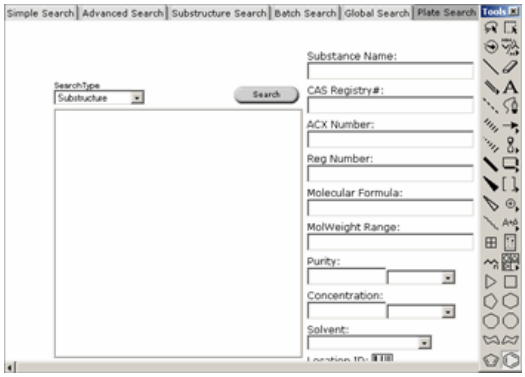
Plate search lets you search for a particular plate in Inventory Enterprise 11.0. You can use Plate search to search the plate on the basis of various fields, such as Substance Name, CAS Registry, ACX Number, Reg Number, Molecular Formula, MolWeight Range, Purity, Concentration, Solvent, Location ID, 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.

To search a plate using the plate search:

1. Click the **Search** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. A window containing various search tabs, such as Simple Search, Advanced Search, Substructure Search, Batch Search, Global Search, and Plate Search, is displayed.

   NOTE: You can also access the window containing the search tabs by clicking the Search link within the Current Location frame in the Container Management area.

2. Click the **Plate Search** tab. The **Plate Search** tab window appears as:



NOTE: The number of tabs visible in the preceding window depends on the configuration settings.

3. Provide the information on the basis of which you want to search the plate.
4. Select the **Search Sublocations** check box if you want to perform search on the location specified in the Location ID field as well as on the child locations of the location.
5. Select the **Exclude Special Locations** check box if you want to exclude the special locations, such as Trash Can, Disposed, and On Order, from the search.
6. Click the **Search** button. A list of plates matching the search criteria specified in the **Plate Search** tab window appears.

Viewing Plate search results

The result of the plate search is a list of plates matching the search criteria specified in the Plate Search tab window.

You can click the desired plate in the search result list to gather detailed information about the plate. When you click a plate in the search result list, the Container Management area displaying the details of the plate appears.

NOTE: In case of viewing plate details, the Container Management area can be considered as Plate Management area because it shows plate details. Similarly, the Container List frame becomes Plate List frame and Container Details frame becomes Plate Details frame.

The different frames of the Container Management area that allow you to gather different information about the plate, are:

- Location Tree frame (Left frame): Provides information about the location of the plate.
- Plate List frame (Upper right frame): Provides information about the key attributes of the plate, such as plate format and plate type.
- Plate Details frame (Lower right frame): Provides detailed information about the plate and its wells. You can gather information about all the attributes of the plate and its wells using the Plate Details frame.

Substance management

The Inventory substances can be managed using the Substance Management area of Inventory Enterprise 11.0. The Substance Management area can be accessed by clicking the Manage Substances link within the Inventory Enterprise section in the home page of ChemBioOffice Enterprise or by clicking the Manage Substances link in the menu bar of the Inventory Enterprise 11.0 home page. The fol-

lowing figure displays the Substance Management area:

The tasks that can be performed in the Substance Management area to manage substances are:

- Creating a new substance
- Searching substances

Creating a new substance

To see if you have the appropriate privileges to create a new substance in Inventory Enterprise 11.0, see “Roles” on page 119 and “Privileges” on page 120.

To create a new substance:

1. Click the **Manage Substances** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The Substance Management area is displayed.
2. Click the **Add Mode** button. The **Create or Edit a substance in Inventory Enterprise** window appears as:

NOTE: The Create or Edit a substance in Inventory Enterprise 11.0 window may display more number of fields on your system. This is because your system administrator may have customized this window.

NOTE: You can also access the Create or Edit a substance in Inventory Enterprise window through the Substance tab of the Create or Edit an Inventory Container window, which is displayed when you click the New Container link in the Current Location frame. This window is accessed from the Substance tab when a new substance is to be created for adding it into a container. For more information about creating a substance through the Substance tab, see “Substance tab” on page 25.

3. Enter information, such as name, structure, registry number, and ACX number of the new substance in the **Create or Edit a substance in Inventory Enterprise** window.
4. Click **OK** to add the new substance to Inventory Enterprise 11.0. A window confirming the creation of the new substance in Inventory Enterprise 11.0 appears.

5. Click **OK**.

Instead of the window that confirms the creation of the new substance in Inventory Enterprise 11.0, the Conflict Resolution screen appears if a unique fields, such as name and CAS Registry number of the new substance matches with an existing Inventory substance.

Searching for a substance

You can search substances in Inventory Enterprise 11.0 using the search form displayed in the Substance Management area of Inventory Enterprise 11.0.

The Substance Management area can be accessed by clicking the Manage Substances link within the Inventory Enterprise section in the home page of ChemBioOffice Enterprise.

The search form that appears in the Substance Management area is the simplified version of the Substructure Search tab window. It lets you search Inventory Enterprise 11.0 on the basis of the Substructure, Substance Name, CAS Registry, ACX Number, Molecular Formula, MolWeight Range, Compound ID, and Compound Type fields.

The following figure displays the search form that can be used to search substances in Inventory Enterprise 11.0:

NOTE: You can also access a substance search form through the Substance tab window of the Create or Edit an Inventory Container window, which is displayed when you click the New Container link in the Current Location frame. This search form is used when you need to search a substance for adding it into a container. For more information about searching a substance through the Substance tab window, see "Substance tab" on page 25.

To search a substance in Inventory Enterprise 11.0 using the Substance Management area:

1. Click the **Manage Substances** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The Substance Management area containing the search form appears.
2. Enter the information on the basis of which you want to search the substance in the search form.
3. Click the **Search** button. The result of the search is a list of substances matching the

search criteria specified in the search form. To gather detailed information about a substance, click the **Details** tab corresponding to the substance.

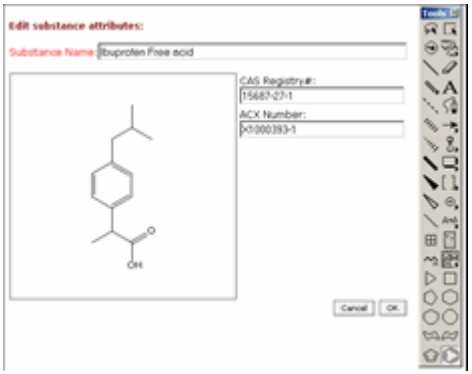
After searching a substance in Inventory Enterprise 11.0, you can perform various tasks on the substance, which are:

- Edit the substance
- Add pictogram to the substance
- Delete the substance
- View history
- Manage synonyms
- Manage links

Editing a substance

To edit an Inventory Enterprise 11.0 substance:

1. Perform a search in the Substance Management area of Inventory Enterprise 11.0 to search the substance that is to be edited. For information about searching substances in Inventory Enterprise 11.0, see "Searching for a substance" on page 11.
2. Click the **Details** tab corresponding to the appropriate substance. A window containing the details, such as molecular weight and molecular formula of the substance appears.
3. Click the **Edit Mode** button. The **Create or Edit a substance in Inventory Enterprise** window, containing the substance details in the edit mode, appears as:



NOTE: If the result of the search is a single compound, then you can access the Edit Mode button directly because in such cases the Details tab is not available.

4. Make the required changes and click **OK**. A window informing you that the substance is updated successfully in Inventory Enterprise 11.0 appears.

NOTE: The Conflict Resolution screen is displayed if the unique fields of the edited substance match with the unique fields of an existing substance.

5. Click **OK**.

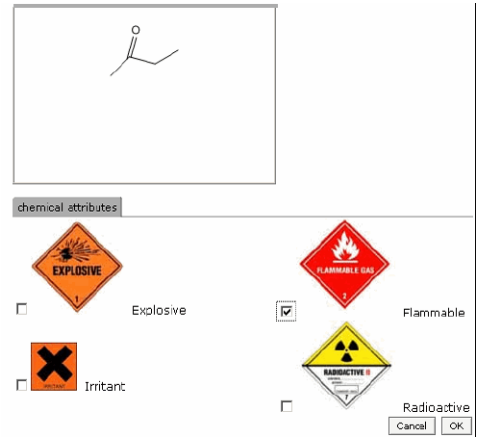
Adding a Pictogram

Pictograms are symbols representing concepts, activities, places, or events by illustration. For example, a chemical hazard label is a pictogram applied to containers to indicate a specific risk that requires precautions.

In Inventory Enterprise 11.0, pictograms are additional fields that an Administrator needs to create in the database. These fields must be defined by your organization to meet your hazard reporting needs.

To add a pictogram to a substance:

1. Perform a search in the Substance Management area of Inventory Enterprise 11.0. For information about searching substances in Inventory Enterprise 11.0, see “Searching for a substance” on page 11.
2. Click the **Details** tab corresponding to the appropriate substance. A window containing the details, such as molecular weight and molecular formula of the substance appears.
3. Click the **Edit Mode** button. Pictograms added by the Administrator are displayed as shown in this figure:



4. Choose the pictogram that represents the appropriate substance attributes.
5. Click **OK**. A confirmation screen appears to verify the correct pictogram to be assigned to the substance.
6. Click **OK.**
7. Browse to the substance and click the Substance tab. You can see the pictogram you added to the substance.

Deleting a substance

To delete an Inventory Enterprise 11.0 substance:

1. Perform a search in the Substance Management area of Inventory Enterprise 11.0 to search the substance that is to be deleted. For information about searching substances in Inventory Enterprise 11.0, see “Searching for a substance” on page 11.
2. Click the **Details** tab corresponding to the appropriate substance. A window containing the details, such as molecular weight and molecular formula of the substance appears.
3. Click the **Delete Record** button. The following window, appears as:

4. Click **OK** to confirm the deletion. A window informing you that the substance is deleted from Inventory Enterprise 11.0 appears.
5. Click **OK**.

Viewing history

The history of a substance lets you keep track of the actions performed on the substance in Inventory Enterprise 11.0. You can view the history of a substance using the audit reports. You can also filter the actions listed in the audit report of a substance to gather information only about the specific actions.

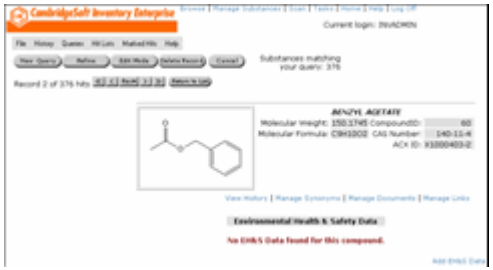
To allow you to view substance history, Inventory Enterprise 11.0 provides two types of audit reports, which are:

- Standard audit report
- Aggregate audit report

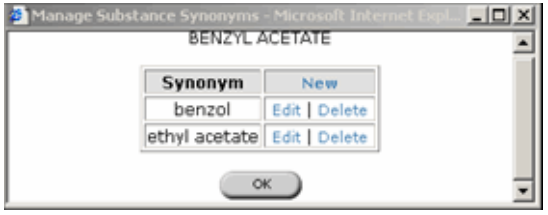
Managing synonyms

You can manage synonyms of a substance through the Manage Synonyms window of Inventory Enterprise 11.0. To access the Manage Synonyms window:

1. Perform a search in the Substance Management area of Inventory Enterprise 11.0 to search the substance, for which you want to manage the synonyms. For information about searching substances in Inventory Enterprise 11.0, see “Searching for a substance” on page 11.
2. Click the **Details** tab corresponding to the appropriate substance. A window containing the details, such as molecular weight and molecular formula of the substance appears as:



3. Click the **Manage Synonyms** link. The **Manage Substance Synonyms** window appears as:



In the Manage Substance Synonyms window, you can perform various tasks, which are:

- Create a new synonym
- Edit a synonym
- Delete a synonym

CREATING A NEW SYNONYM

To create a new synonym:

1. Click the **New** link in the **Manage Substance Synonyms** window. The **Create a New Synonym** window appears.
2. Enter the synonym in the **Synonym** text box.
3. Click **OK**. Observe that the newly created synonym is added to the list of synonyms displayed in the **Manage Substance Synonyms** window.

EDITING A SYNONYM

To edit a synonym:

1. Click the **Edit** link next to the synonym that is to be edited, in the **Manage Substance Synonyms** window. The **Create a New Synonym** window, containing the synonym in the edit mode, appears.
2. Edit the name of the synonym in the **Synonym** text box.
3. Click **OK**.

DELETING A SYNONYM

To delete a synonym:

1. Click the **Delete** link next to the synonym that is to be deleted, in the **Manage Substance Synonyms** window. The **Create a New Synonym** window appears and confirms the deletion operation.
2. Click **OK**.

Managing links

Inventory Enterprise 11.0 lets you associate links with a substance. These links can be clicked to gather additional information about the substance. You can manage links through the Manage Links window of Inventory Enter-

prise 11.0. To access the Manage Links window:

1. Perform a search in the Substance Management area of Inventory Enterprise 11.0 to search the substance, links associated with which are to be managed. For information about searching substances in Inventory Enterprise 11.0, see "Searching for a substance" on page 11.
2. Click the **Details** tab corresponding to the appropriate substance. A window containing the details, such as molecular weight and molecular formula of the substance appears.
3. Click the **Manage Links** link. The **Manage Links** window appears as:

In the Manage Links window, you can perform various tasks, which are:

- Create a new link
- Edit a link
- Delete a link

CREATING A NEW LINK

To create a new link:

1. Click the **New** link in the **Manage Links** window. The **Create/Edit/Delete an Inventory Link** window appears.
2. Enter the URL of the link in the **URL** text box.
3. Enter the text for the link in the **Link Text** text box.
4. Click **OK**. You can access the link from the Substance tab in the Container Details frame.

EDITING A LINK

To edit a link:

1. Click the **Edit** link next to the link that is to be edited, in the Manage Links window. The **Create/Edit/Delete an Inventory Link** window, containing the link information in the edit mode, appears.
2. Make the required changes and click **OK**.

DELETING A LINK

To delete a link:

1. Click the **Delete** link next to the link that is to be deleted. The **Create/Edit/Delete an Inventory Link** window, asking you to confirm the deletion operation, appears.
2. Click **OK** to delete the link.

Container management

Inventory Enterprise 11.0 allows chemical and pharmaceutical research centers to manage the containers associated with the reagents that are procured or produced by the research centers. The container management tasks are performed in the Container Management area of Inventory Enterprise 11.0. You can access the Container Management area by clicking the Browse link within the Inventory Enterprise section in the home page of ChemBioOffice Enterprise.

The Container Management area comprises of four frames, which are:

- Location Tree frame (Left frame)
- Current Location frame (Top frame)
- Container List frame (Top right)
- Container Details frame (Bottom right)

The various tasks that can be performed in the Container Management area, are:

- Manage locations

- Create a new container
- Search containers
- View container contents

Location management

You can manage the Inventory locations using two frames of the Container Management area. The two frames are:

- Location Tree frame
- Current Location frame

Location Tree frame

The Location Tree frame lets you navigate through the Inventory locations. It displays a hierarchical structure in which locations are nested within other locations. This hierarchical structure is also known as the location tree.

The locations are represented as folders in the location tree. You can access a desired location by navigating through the various folders in the location tree. You can click the +/- symbols displayed next to the folders to navigate through the location folders. When you click a folder in the Location Tree frame, the contents of the location associated with the folder are displayed in the Container List frame.

In addition to the location tree, Location Tree frame also contains the following links:

- Location: Lets you create, edit, move, or delete locations, and set a default location.
- Default: Lets you open the location tree at your default location. For information about setting a location as home location, see “Make default” on page 18.
- Refresh: Lets you populate the Location Tree frame with the latest location data and contract the location tree to its original position.

Location Tree frame operations

NEW LOCATION

To create a new location:

1. Select **New** from the **Location** menu in the Location Tree frame. The **Create a New Location** window appears as:

2. Click the **Browse** link next to the **Parent Location** text box to select a parent location for the new location.
3. Navigate to desired location and select it. The preceding window closes and the **Create a New Location** window is displayed with the selected location name in the **Parent Location** text box.
4. Specify barcode ID for the location either by typing the ID in the **Location ID** text box or by selecting the **Autogenerate barcode ID** check box.

   NOTE: When you select the Autogenerate barcode ID check box, the Barcode Description drop down list is displayed above the check box. You need to select Location Barcodes from the drop down list to generate barcode ID for the location.

5. Type the name of the location in the **Location Name** text box.

6. Select appropriate location type from the **Location Type** drop down list.
7. Click the **Add Address** link if you want to specify complete physical address of the new location. The following window appears as:

8. Enter relevant information in the respective fields and click **OK**.
9. Click **OK** to close the **Create a New Location** window.

EDIT LOCATION

To edit a location:

1. Select the location that you need to edit, in the Location Tree frame.
2. Select **Edit** from the **Location** menu in the Location Tree frame. The **Edit Location** window appears as:

3. Modify the information in the respective fields as per your requirements.

NOTE: If the address of the currently selected location has changed, click the Add Address link and modify the address.

4. Click **OK**.

MOVE LOCATION

To move a location:

1. Select the location you need to move in the Location Tree frame.
2. Select **Move** from the **Location** menu in the Location Tree frame. The **Move Inventory Location** dialog box appears as:

3. Specify the desired destination location for the selected location in the **Destination Location** field.
4. Click **OK**. You can observe that the desired location has been moved to a different location in the location tree.

DELETE LOCATION

To delete a location:

1. Select the location that you need to delete, in the Location Tree frame.
2. Select **Delete** from the **Location** menu in the Location Tree frame. The **Delete Inventory Location** window appears.
3. Ensure that the location to be deleted is specified in the **Location to delete** field.
4. Click **OK** to delete the specified location.

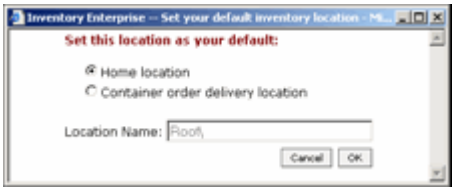
NOTE: You can delete a location only if it is empty. Therefore, if you want to delete an non-empty location, you should select the check box, Recursively delete related locations and containers. When this check box is selected, all the sub locations and containers within the selected location are deleted before the selected location is deleted.

MAKE DEFAULT

You can set a location as the default location so that it gets open in the Location Tree frame automatically, each time the Container Management area is accessed.

To set a location as the default location:

1. Navigate to the location that is to be set as the default location, in the Location Tree frame.
2. Select **Set Default** from the **Location** menu in the Location Tree frame. The **Set your default inventory location** window appears as:



3. Make sure that the location specified in the **Location Name** text box is the location that is to be set as the default location.
4. Click **OK**.

PRINT LOCATION BARCODES

To print location barcodes:

1. Select a location in the Location Tree frame.
2. Select **Print Label** from the **Location** menu in the Location Tree frame. The **Print Location Labels** window appears.

   When the **Print Location Labels** *window is first displayed, the application will determine how many location label reports are defined within the system. If only one report is defined, the application will automatically execute that report and display the resulting barcode, and the* **Print** *dialog box will appear.*

   If more than one report is defined, you will have the option to choose from a drop-down list of available reports.
3. Choose a report from the list to trigger the report generation process.
4. Print the barcode using the **Print** link in the bottom-right corner.

5. Close the form using the **Close** link.

NOTE: To support the print location barcode function, a new report type in the Inventory database along with a new Access query and report layout were created as part of Inventory Enterprise 11.0. If you install Inventory Enterprise 11.0 from scratch, you will get a default location barcode report automatically. Those who update will need to update their Cheminv_Reports Access database so that it includes the new query and new report.

PRINTING BARCODES ON ZEBRA PRINTER

Inventory Enterprise 11.0 uses the LPR service to facilitate printing of location, container, and plate barcodes on network printers, such as Zebra printers.

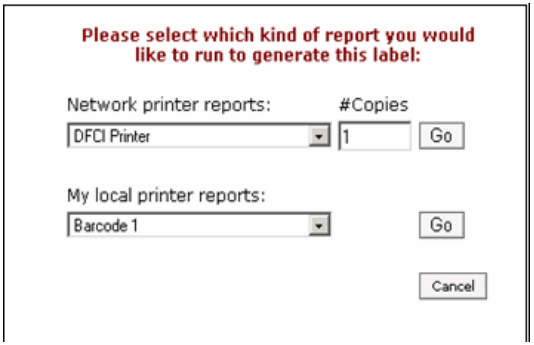
To print barcodes on Zebra printer:

1. Select a location Location Tree frame.

   NOTE: You can also select a container/plate to print its barcode on a Zebra printer.

2. Select **Print Label** from the **Location** menu in the Location Tree frame.

   Using the inv_label_printers table, the Inventory application determines whether LPR printers (network printers) have been defined for the selected location. If any LPR printer has been defined, the following form appears as:



   NOTE: If no printers are defined in the database for the selected location, the form shown in the preceding figure will not appear; rather, the you will be taken directly to the Print Location Labels window. In this way, the new LPR printer definition will be completely transparent for users who do not choose to utilize this feature.

3. Select the connected Zebra printer in the **Network printer reports** drop-down list.
4. Specify the number of copies to print.
5. Click the **Go** button to trigger an immediate printing of the labels using the LPR print definitions in the database.

   NOTE: Clicking the **Go** *button to the right of the* **My local printer reports** *drop-down will open up the classic Print Label form displaying the Access Snapshot/PDF report generator.*

NOTE: Inventory Enterprise 11.0 also lets you print multiple barcodes simultaneously. To print multiple container/plate barcodes in one pass during multi-select operations, you can select Other>Print Labels from the Container Details frame.

You can only use LPR printers (network printers) to print multiple container/plate barcodes. The print functionality during multi-select operations is identical to when a single container or plate is selected.
If no LPR printers have been defined for the selected containers/plates, an error message appears.

Current Location frame

The Current Location frame consists of the Location text box that contains the complete path of the location, which is currently selected in the Location Tree frame. It also contains various links that can be clicked to perform different actions on the selected location or on the containers stored in the selected location. These links are:

- Search: Lets you search a container or plate in Inventory Enterprise 11.0. When you click the Search link for the first time the default search form is displayed, otherwise, the search form that was accessed by the user in his last visit to the Search link is displayed.
- Manage Substances: Lets you manage chemical inventory substances.
- My Requests: Lets you view information about sample requests and reservations. You can choose the columns that will be displayed in the list of sample requests. Also, you can cancel a request.
- Scan: Lets you scan container barcode.
- New Container: Lets you create a new container.
- New Samples: Lets you create new samples.
- Receive Order: Lets you receive the ordered containers.
- Order Container: Lets you place orders for containers.
- Tasks: Lets you perform administrative tasks, such as managing tables and container requests.
- Home: Displays the login window of ChemBioOffice Enterprise.
- Help: Opens the Inventory Enterprise 11.0 User's Guide.
- Log Off: Logs off the current user.

Your Current Location frame may not display all the links that are listed above. This is because you may not have sufficient privileges to perform the task performed by the hidden links. To see if you have the appropriate privileges to access a link in the Current Location frame, see “Roles” on page 119 and “Privileges” on page 120.

Current Location frame operations

SEARCH

The Search link in the Current Location frame lets you search substances, containers, and plates in Inventory Enterprise 11.0.

The various type of searches, which you can perform in this search form, are:

- Simple search
- Advanced search
- Substructure search
- Batch Search
- Global search
- Plate search

MANAGE SUBSTANCES

For more information on managing substances, see “Substance management” on page 9.

MY REQUESTS

The My Request link in the Current Location frame lets you view a list of sample requests. This list is automatically populated when you request a sample.

The Column Chooser link lets you select the columns that will be displayed in the list of sample request.

You can cancel a request by clicking the Cancel link.

The My Reservation link lets you view the samples that have been reserved after performing batch search, and request for the reserved samples. For more information about reserving samples, see “Reserve sample” on page 44.

SCAN

The Scan link in the Current Location frame lets you scan multiple containers and perform an action, such as move or delete, on all the containers at once. To perform scanning:

1. Click the **Scan** link. The **Scan multiple containers** window appears.
2. Type the barcode of the container on which an action is to be performed in the **Scan Container Barcode** text box.
3. Press the **Tab** key. Observe that the container is scanned and added to the list, as shown in this figure:

NOTE: You can remove a container from the list of the scanned container by clicking the Remove link next to the container.

4. Repeat steps 2, 3, and 4 until all the required containers are scanned and added to the list.
5. Click the appropriate link, such as **Check Out** or **Move Containers**, and perform the required action on the list of the scanned containers.

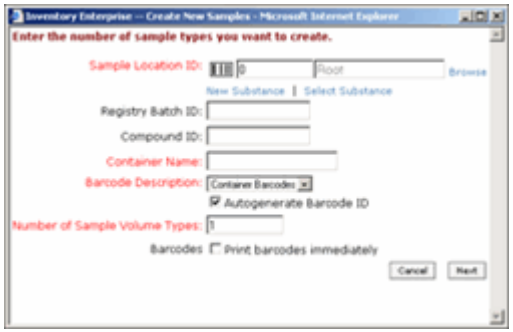
NEW CONTAINER

The New Container link enables you to a new container at any location. For more information about creating containers, see “Creating a new container” on page 24.

NEW SAMPLE

To create a new sample:

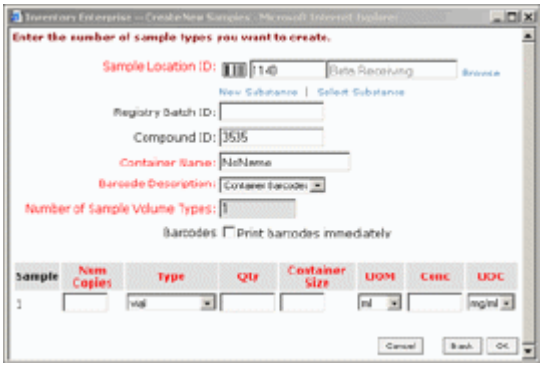
1. Click the **New Samples** link. The **Create New Samples** window appears as:



2. Click the **Browse** link to select the location where you want to place the sample.
3. Click the **Select Substance** link to open the substance search form.
4. Search for the required substance and select it. For more information, see "Searching for a substance" on page 11. The Compound ID and Compound Name fields in the **Create New Samples** window get populated after a substance is selected.

NOTE: The search result will include all the substances that match the specified criteria. This is unlike global search, which returns a matching substance only if that substance is associated with a product.

5. Click **Next**. The following window appears as:



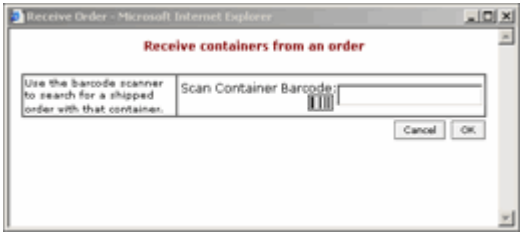
6. Enter information related to the sample to be created.
7. Click **OK**. The newly created sample will be added to the list of containers in the location wherein the sample was created.

RECEIVE ORDER

The Receive Order feature lets you receive a shipped order. When you receive an order, the order is marked as Closed and the ordered containers or requested samples are delivered to the specified location.

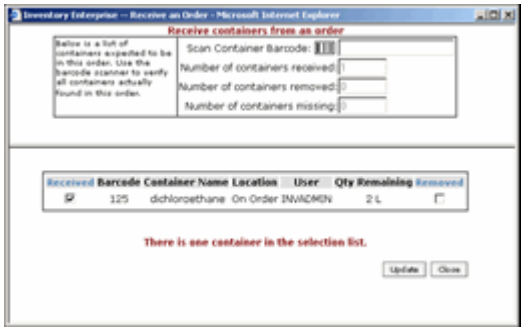
To receive an order:

1. Click **Receive Order** in the Current Location frame. The **Receive an Order** window appears as:



2. Type the barcode of the container that is to be received in the **Scan Container Barcode** text box.

3. Press the **Tab** key. Observe that the container is scanned and added to the selection list, as shown in this figure:



NOTE: You can remove a container from the list of the scanned containers by clicking the Remove link next to the container. You can remove all the containers from the list by clicking the Clear List link.

4. Repeat steps 2 and 3 until all the required containers are scanned and added to the list.
5. Ensure that the check boxes next to the containers that are to be received are selected and click the **Update** button.
6. Click **OK** when the success message appears.

ORDER CONTAINER

Users can place an order for a container that has not yet been created in Inventory Enterprise 11.0 using the Order Container link. However, if the container is already there in Inventory Enterprise 11.0, you can order the container using the Reorder Container link in the Container Details frame.

To place order for a container:

1. Click the **Order Container** link in the Current Location frame. The **Order New Substance** window appears as:

NOTE: If you cannot find the Order Container link in the Current Location frame, see your system administrator.

The Order New Substance window contains various tabs that allow you to store different types of information about the container, in Inventory Enterprise 11.0. These tabs are:

- Required: Lets you set the fields, for which it is mandatory to provide information while ordering a container. These fields are known as required fields and are marked in Red color.
- Substance: Allows you store a substance into the container. You can add a substance to the container either by creating a new substance or by selecting an existing substance.
- Contents: Lets you store information about the container contents.
- Owner: Lets you store information about the owner of the container.
- Comments: Lets you store additional information about the container, such as

storage conditions and handling procedures.

NOTE: For information about the fields in the different tab windows, see ""Inventory Enterprise 11.0 form fields" on page 114.

2. Provide appropriate information about the container on the respective tabs and click **OK**.

TASKS

When you click the Tasks link in the Current Location frame, the Administrative Menu window appears as:

The Administrative Menu window contains following links to allow you to perform different administrative tasks, which are:

- Search Inventory
- Manage Tables
- Manage Batching Fields
- Manage Reports
- Analyze Audit Trails
- Custom Reports
- Manage Approvals
- Manage Requests
- Manage Sample Requests
- Manage Orders
- Manage Container Receiving
- Change Password
- Manage Users
- Manage Roles
- Manage Role Locations
- Plate Settings
- Create Plates from Excel
- Create Plates from Text File
- Help
- Log Off

Apart from the above links, the Administrative Menu window provides links for managing grids and organizations.

To see if you have the privileges to perform an administrative task, see "Roles" on page 119 and "Privileges" on page 120.

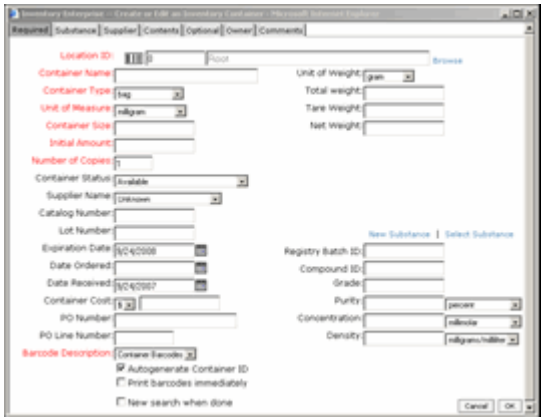
Creating a new container

You can create a container at any location, such as freezer room or stock room. To see if you have the appropriate privileges to create a new container, see "Roles" on page 119 and "Privileges" on page 120.

To create a container:

1. Navigate to the location at which you want to create the new container, in the Location Tree frame.

2. Click the **New Container** link in the Current Location frame. The **Create or Edit an Inventory Container** window appears as:



The Create or Edit an Inventory Container window contains various tabs, which are:

- Required
- Substance
- Supplier
- Contents
- Optional
- Owner
- Comments

NOTE: The preceding image shows the Required tab window. The fields that are marked in Red in the Required tab window are the required fields.

3. Enter appropriate information about the container on the respective tab windows and click **OK**.

Required tab

The Required tab lets you set the required fields of a container. Required fields are the fields for which it is mandatory to provide information. The required fields for a container are:

- Location ID: Specifies the ID of the location at which the container is to be created.
- Container Name: Specifies the name of the container that is to be created.
- Container Type: Specifies the type of the container, such as bottle, tube, and bag.
- Unit of Measure: Specifies unit of measurement for the container, such as milligram and milliliter.
- Container Size: Specifies the size of the container.
- Initial Amount: Specifies the amount of the chemical substance initially available in the container.
- Number of Copies: Specifies the number of copies that are to be created for the container.
- Barcode Description: Specifies the barcode type, such as location barcode, containers barcode, or plate barcode.

For information about other fields contained in the Required tab, see “Inventory Enterprise 11.0 form fields” on page 114.

Substance tab

The Substance tab lets you specify which substance is to be stored in the container.

To add a substance to the container using the Substance tab, you need to perform one of the two tasks, which are:

- Create a new substance
- Select an existing substance

CREATING A NEW SUBSTANCE

To create a new substance:

1. Click the **New Substance** link in the **Substance** tab window. The **Create or Edit a substance in Inventory Enterprise** window is displayed.

2. Type the name of the substance in the **Substance Name** text box.
3. Draw the chemical structure of the substance in the available drawing area using the ChemDraw plug-in.
4. Type the CAS registry and ACX number for the substance in the **CAS Registry** and **ACX Number** text boxes, respectively.
5. Click **OK**.

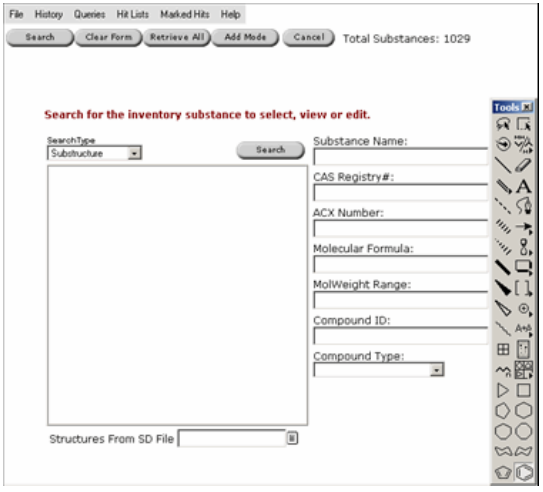
NOTE: If the substance created by you exists already in Inventory Enterprise 11.0, the conflict resolution screen is displayed when you click **OK**.

6. Click the **Select** link next to the newly created substance to add the substance to the container.

SELECTING AN EXISTING SUBSTANCE

To select an existing substance:

1. Click the **Select Substance** link in the **Substance** tab window. The following search form appears as:



2. Enter the required information and click the **Search** button. A list of substances matching the search criteria specified in the search form appears.
3. Click the **Details** tab corresponding to the substance that is to be added to the container.
4. Click **OK** to add the selected substance to the container.

NOTE: The New Substance and Select Substance links are also available in the Required tab window. Therefore, you can also add a substance to the container using the Required tab window.

Supplier tab

On the Supplier tab window, you can provide information about the supplier of the container and its contents.

For information about the fields contained in the Supplier tab, see "Inventory Enterprise 11.0 form fields" on page 114.

Contents tab

On the Contents tab window, you can provide information about the contents of the container. It is important to keep track of the information about the contents of a container because different batches of a substance can have slightly different properties.

For information about the fields contained in the Contents tab, see "Inventory Enterprise 11.0 form fields" on page 114.

Optional tab

On the Optional tab window, you can provide the information that does not fit in any other tab, but is important to include.

For information about the fields contained in the Optional tab, see "Inventory Enterprise 11.0 form fields" on page 114.

Owner tab

On the Owner tab window, you can provide information regarding the owner of the container. The following figure displays the Owner tab window.

For information about the fields contained in the Owner tab, see “Inventory Enterprise 11.0 form fields” on page 114.

Comments tab

On the Comments tab window, you can provide additional information about the container, such as handling procedures and storage conditions.

For information about the fields contained in the Comments tab, see “Inventory Enterprise 11.0 form fields” on page 114.

Grid management

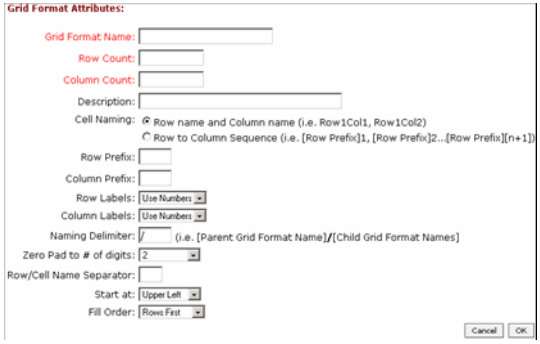
The Grid Management feature in Inventory Enterprise 11.0 lets you place plates and containers in grids, in the same way as they are physically kept in racks. Before placing place plates and containers in grids, you need to create a grid format, which specifies the number of rows and columns of the grid.

NOTE: In order to enable the Grid Management feature, you need add a new line, ENABLE_GRID_MANAGEMENT= "True", in the invconfig.ini file. Contact your system administrator for configuring the invconfig.ini file.

Creating grid format

To create a grid format:

1. Log on to the ChemBioOffice Enterprise application as an administrator of Inventory Enterprise 11.0. The home page of ChemBioOffice Enterprise is displayed.
2. Click the **Tasks** link in the **Inventory Enterprise** section. The **Administrative Menu** window appears.
3. Click the **New** link in the **Grid Management** section. The **CreateGrid Format** window appears as:



4. Type a name for the grid format in the **Grid Format Name** text box.
5. Specify the number of rows and columns to be contained in the grid, in the **Row Count** and **Column Count** text boxes.
6. Click **OK** to display a window confirming that the grid has been created.
7. Click **OK** to close the confirmation window.
8. Click the **Close** button to close the **Administrative Menu** window.

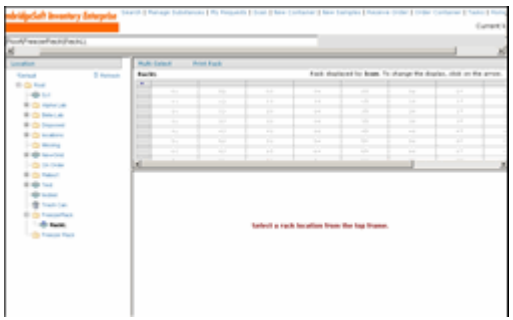
Creating rack location

To create a rack location:

1. Create a location, Freezer Rack. For more information about creating locations, see “New location” on page 16.
2. Select the new location, **Freezer Rack**.

3. Select **New** from the Location menu in the menu bar of the Location Tree frame. The **Create a New Location** window appears

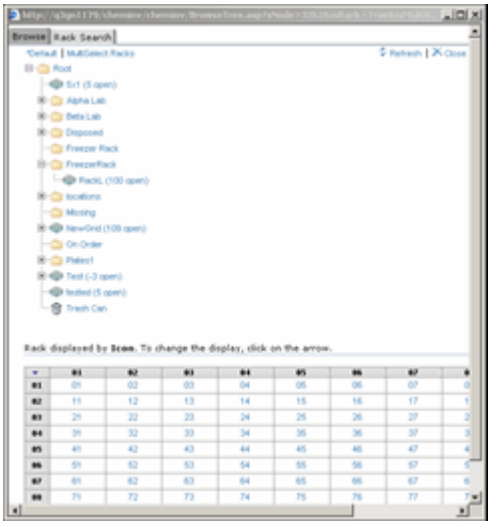
4. Click the **Autogenerate** check box so that the location id is automatically generated.
5. Type a name in the **Location Name** text box.
6. Select the grid format you created in the **Grid Format** text box. Observe that the **Location Type** field changes to **Rack**.
7. Click **OK**. The new location will be displayed in the Location Tree frame of the Inventory Enterprise 11.0 home page.
8. Click the new location to display the grid in the Container List frame, as shown in this figure:



Placing containers on a rack

To place containers on a rack:

1. Create a few containers in a location other than the rack. For more information about creating containers, see “Creating a new container” on page 24.
2. Click on a container in the Container List frame to display its details in the Container Details frame.
3. Select **Edit Container** from the **Update** menu of Container Details frame. The **Create or Edit an Inventory Container** window appears.
4. Click the Required tab, if some other tab is displayed.
5. Click the **Browse** link.
6. Select a rack location or multiple racks. The grid appears, as shown in this figure:



7. Select a grid cell.
8. Click **OK** in the **Create or Edit an Inventory Container** window. The Container Management area is displayed.
9. Click the rack location you selected in the Location Tree frame. The selected con-

tainer will be displayed in the selected cell of the grid, in the Container List frame.

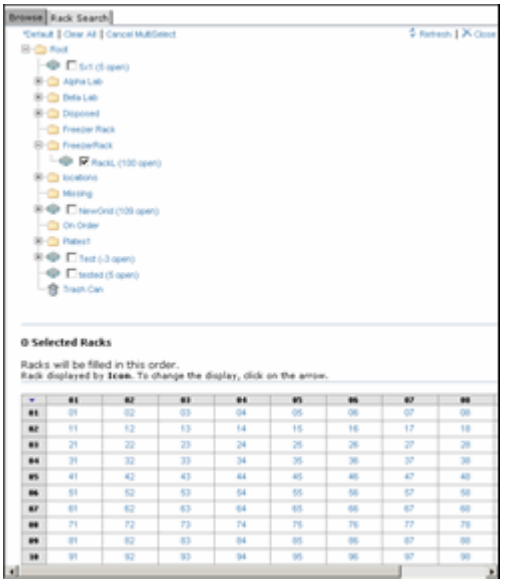
NOTE: By default, icons are displayed for the containers in the grid. You can change the view by clicking the down arrow in the first cell of the grid and then selecting the appropriate display option.

Multi-select racks

To select multiple racks:

1. Click the **MultiSelect Racks** link in the browse window, which appears on clicking **Browse** in the **Create or Edit an Inventory Container** window. On clicking the **MultiSelect Racks** link, the following window appears as:

2. Select the desired racks and click the links. The following window appears as:



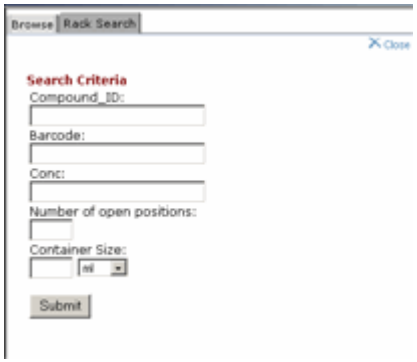
3. Select a cell in the grid to specify the order in which the racks will be filled.

Searching racks

The Rack Search feature lets you search the appropriate rack location when placing containers in a rack, creating new containers, or creating new locations. To search for the appropriate rack location:

1. Create a few containers in a location other than the rack. For more information about creating containers, see “Creating a new container” on page 24.
2. Click on a container in the Container List frame to display its details in the Container Details frame.
3. Select **Edit Container** from the **Update** menu of Container Details frame. The **Create or Edit an Inventory Container** window appears.
4. Click the **Browse** link.

5. Click the **Rack Search** tab. The following window appears as:



6. Enter the criteria for selecting the rack.
7. Click the **Submit** button to display the list of racks.
8. Click the desired rack. The content of the selected rack appears.
9. Click a cell in the grid to specify the order in which the rack will be filled. The selected rack will appear in the **Create or Edit an Inventory Container** window.

Searching for a container

If you know the location of the container you are looking for, you can search the container using the Location Tree frame of the Container Management area. To search a container using the Location Tree frame and view its details:

1. Click the **Browse** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The Container Management area appears.
2. Navigate to the location that contains the required container, in the Location Tree frame.
3. Select the appropriate location. The contents of the location are displayed in the Container List frame.
4. Click the appropriate container in the Container List frame to view its details in the Container Details frame.

For more information about the Location Tree frame and how to navigate through it, see “Location management” on page 16.

When you do not know the location of the container you are looking for, you can search the container using the search forms. The search forms allow you to search a container on the basis of various container attributes, such as container name and type. Inventory Enterprise 11.0 provides search forms to allow you to search containers on the basis of various search criteria. For more information about the different search forms, see “Simple search” on page 2, “Advanced search” on page 3, “Substructure search” on page 5, and “Global search” on page 6.

Viewing contents of a container

After searching a container either by navigating through the Location Tree frame or using the search forms, you can view the contents of the container using the following frames of the Container Management area:

- Container List frame
- Container Details frame

Container List frame

The Container List frame displays all the containers and plates contained in the location selected in the Location Tree frame. The  icons beside the containers allow you to distinguish the containers from plates. When you click a container, the  icon besides the container changes to the  icon and the details of the container are displayed in the Container Details frame.

The Container List frame consists of various columns that allow to gather information about the key container attributes, such as container name and ID. You can click a column to sort the containers displayed in the Container List frame on the basis of the column. When you click a column, a icon is displayed next to the column name. This icon enables you to determine the sorting order for the containers.

The Container List frame provides several links to allow you to view the list of container in different ways. These links are:

- View: Provides access to the following links:
  - Multi Select: Enables you to select more than one container. After selecting multiple containers, you can perform an action on all the containers, simultaneously.
  - Large Icons: Displays large icons corresponding to the list of containers.
  - Small Icons: Displays small icons corresponding to the list of containers.
  - Details: Displays the Container List frame in its default view.
  - Column Chooser: Lets you customize the appearance of the Container List frame. You can use the Column Chooser link to add or remove columns to or from the Container List frame and set the width of the columns. You can also use Column Chooser to specify the number of containers that should be displayed in a window of the Container List frame, at once.
- Rectify Contents: Verifies whether a container is at the location where Inventory Enterprise 11.0 thinks it should be. The Rectify Contents link also lets you update Inventory Enterprise 11.0.
- Print Report: Lets you generate reports containing information about the containers contained in the selected location.

NOTE: Your Container List frame may not display all the links that are listed above. This is because you may not have sufficient privileges. To see if you have the appropriate privileges to access a link in the Container List frame, see "Roles" on page 119 and "Privileges" on page 120.

Container Details frame

The Container Details frame lets you gather detailed information about the container selected in the Container List frame. You can gather information about all the attributes of a container using the Container Details frame. As there are large number of container attributes, similar types of container attributes are grouped under different tabs in Container Details frame, which are Summary, Substance, Supplier, Quantities, Comments, Reservations, Other, EH&S, and Requests.

For information about the fields in each tab, see "Inventory Enterprise 11.0 form fields" on page 114.

The various actions that can be taken on a container in the Container Details frame are:

- Change Qty
- Change Status
- Edit Container
- Move Container
- Retire Container
- Delete Container
- Copy Container
- Split Container

- Create Samples
- Reorder Container
- Check Out
- Check In
- Request
- Assign to Order
- Certify Container
- View History
- View Lineage
- Print Label
- Manage Links
- Manage Documents

NOTE: The above mentioned actions can be performed using the following menu links: Update, Create, Obtain, and Other.

Container List frame functions

The functions included in Container List frame are:

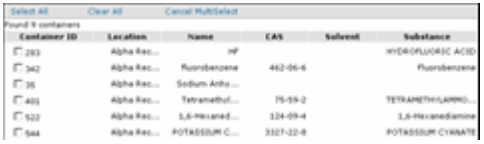
- Multi select
- Large icons
- Small icons
- Details
- Column chooser
- Rectify contents
- Print report

MULTI SELECT

When you click the Multi-Select link in the Container List frame, the view of the Container List frame changes and check boxes are placed beside all the containers displayed in the Container List frame. This allows users to select multiple containers and perform a single action on all the containers, simultaneously.

To select multiple containers:

1. Select **Multi Select** from the **View** menu in the Container List frame. The following view of the Container List frame appears as:



NOTE: You can exit the multi select mode by clicking the Cancel MultiSelect link in the Container List frame.

2. Select the check boxes next to the containers that are to be moved. A number of links appear in the Container Details frame.
3. Select **Move Containers** link from the **Update** menu in the Container Details frame to display the **Move Inventory Container** window.
4. Provide the required information in the **Move Inventory Container** window.
5. Click **OK**.

The operations that can be performed on the containers that are in the multi select mode, are:

- Move Containers
- Retire Containers
- Delete Containers
- Update Containers
- Check Out
- Check In

LARGE ICONS

When you select Large Icons from the View menu in the Container List frame, large sized icons are displayed corresponding to the con-

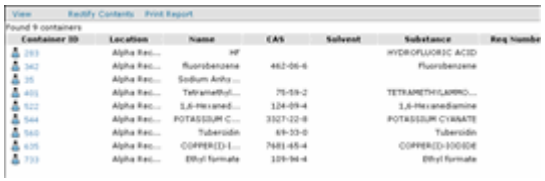
tainers listed in the Container List frame, as shown in this figure:

SMALL ICONS

When you select Small Icons from the View menu in the Container List frame, small sized icons are displayed corresponding to the containers listed in the Container List frame, as shown in this figure:

DETAILS

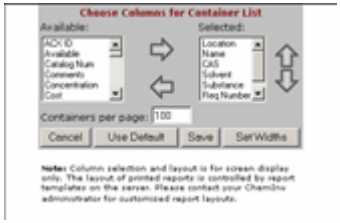
When you select Details from the View menu in the Container List frame, the Container List frame is displayed in its default view, as shown in this figure:



The default view of the Container List frame consists of various columns that allow you to gather information about the key attributes of the containers listed in the Container List frame.

COLUMN CHOOSER

When you select Column Chooser from the View menu in the Container List frame, the Column Chooser window appears as:



In the Column Chooser window, you can perform various tasks, which are:

- Add or remove columns from the Container List frame
- Set containers per window
- Set column width

Adding or removing columns

To add a column to the Container List frame:

1. Select the appropriate column within the **Available** list in the **Column Chooser** window.
2. Click the following icon to add the selected column to the **Selected** list:

3. Click the **Save** button.

To remove a column from the Container List frame:

1. Select the appropriate column in the **Selected** list in the **Column Chooser** window.
2. Click the following icon to remove the selected column from the **Selected** list:

3. Click the **Save** button.

Setting containers per window

By default, the Container List frame can display 100 containers in one window. However, you can change the default setting by editing the Containers per window text box in the Column Chooser window.

Setting column width

To set the width of the columns in the Container List frame:

1. Click the **Set Widths** button. The following window, displaying a list of the columns contained in the Container List frame, appears as:

2. Set the width of the columns, as required, and click the **Save** button.

RECTIFY CONTENTS

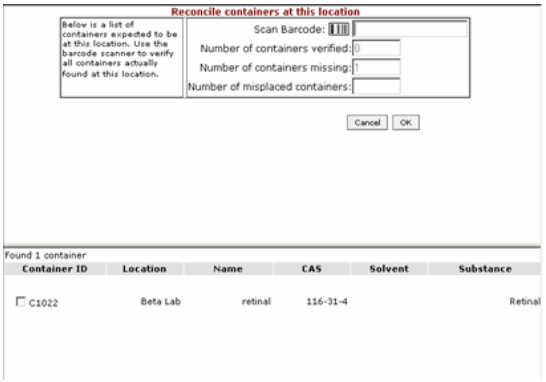
There are situations when the locations of the containers in Inventory Enterprise 11.0 are changed, but Inventory Enterprise 11.0 is not updated with the changes. This results in discrepancies in Inventory Enterprise 11.0. The content rectification feature lets you verify that a container is at the appropriate location. Unlike the Update Contents function, the Rectify Contents function lets you correct these discrepancies and update Inventory Enterprise 11.0.

The content rectification feature should be used on quarterly or biannual basis during official reconciliation efforts. By rectifying content of a location, you can perform the tasks, which are:

- Move the containers that are not present at a location, but should be there, to that location.
- Move the containers that are present at a location, but should not be there, to the missing location.

To rectify contents of a location:

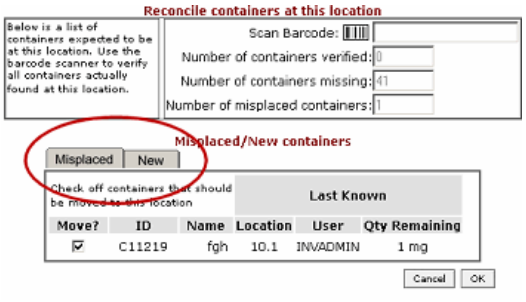
1. Navigate to the location whose contents are to be rectified.
2. Click the **Rectify Contents** link in the Container List frame. The **Reconcile Location** window appears as:



- The lower frame of the **Reconcile Location** window contains a list of containers that are expected to be at the selected location.

3. Type the barcode of the container, whose availability is to be verified, in the **Scan Barcode** text box.
4. Press the **Tab** key. The check box corresponding to the scanned container is automatically selected. However, if the scanned container is not available at the location, the container is added to the list of the misplaced containers. The list can be viewed under the **Misplaced** tab, which appears in the **Reconcile Location** window when you

press the **Tab** key after scanning a barcode, as shown in this figure:



If the scanned barcode does not exist in the Inventory database then it is added to a temporary list of unknown/new container containers. This list appears under the **New** *tab and displays the unknown/new containers that have been scanned/entered since the* **Reconcile Location** *form was first opened.*

A **Print** *button appears in the upper-right corner, as shown in this figure:*

On clicking this button, the application displays a printer-friendly container report that includes more specific information about the location. This information can be used by Inventory Enterprise 11.0 during the workflow. In addition, clicking the **Print** *button automatically brings up the Windows* **Print** *dialog box using which you may choose the printer to send and print the file.*

The temporary list will remain within the Reconcile Form until it has been closed, whether the report has been printed or not. Once you close the **Reconcile Location** *form, the list is removed from memory and is no longer retained in any form within the application or database. The list is truly a temporary object that has no permanence, other than the physical piece of paper that might be printed.*

5. Repeat steps 3 and 4 for all the containers, whose availability is to be verified.

NOTE: Clear the check box next to the misplaced container, if you do not want to move it to the location, contents of which are being rectified.

---

6. Click **OK**. If the list of the expected containers contains some containers that are not verified, the containers are marked as missing and a warning message box appears.
7. Click **OK** if you want to move the containers that have not been verified to the missing location.

PRINT REPORT

The Print Report link in the Container List frame lets you generate a report that can provide summarized information about all the containers contained in the Container List frame. You can also generate barcodes for all the containers stored in the location using the Print Report link. A barcode is a special type of report that can provide information about any attribute associated with a container.

The reports are driven by the report layouts, which specify the format for a report and the information that is to be included in the report. Therefore, report layout that you choose while generating the report specifies whether to generate a report that provides information about all the containers contained in the Container List frame or to generate barcodes for the containers.

As reports are driven by report layouts, the reports may not provide the same information as provided by the Container List frame. For example, the Container List frame may display information about the costs of the containers, however, the report generated for the Container List frame may not provide this information.

NOTE: If the reports available in Inventory Enterprise 11.0 does not fulfill your requirements and you need additional reports, see your system administrator.

To generate reports using the Print Report link:

1. Click the **Print Report** link in the Container List frame to display the **Reports** window.
2. Select the appropriate report layout from the **Select a report layout** drop down list.
3. Click the **Go** button. The **Reports** window gets populated with the **Select a report format** drop down list.
4. Select the appropriate format for the report from the **Select a report format** drop down list.
5. Click the **Go** button. A warning message is displayed. The warning message informs you that the window, which will be displayed next possesses a security risk.
6. Click the **Yes** button to continue. The result is displayed in the lower frame of the **Reports** window.

The following figure displays the report that provides information about all the containers stored in the location:

The following figure displays the report that contains barcodes of all the containers stored in the location:

You can print the reports by clicking the  icon displayed in the lower frame of the Reports window.

Container Details frame functions

The Container Details frame includes various functions, which are:

- Change qty
- Change status
- Edit container
- Move container
- Retire container

- Delete container
- Copy container
- Split container
- Create samples
- Reorder container
- Check out
- Check in
- Request container
- Request sample
- Assign to order
- Certify container
- History
- Lineage
- Print label
- Manage links
- Manage documents

CHANGE QTY

To see if you have the appropriate privileges to change the quantity of the substance stored in a container, see "Roles" on page 119 and "Privileges" on page 120.

The quantity of a substance stored in a container modifies when the substance is used in experiments. The Change Qty feature lets you update Inventory Enterprise 11.0 with the changes in the quantity of the substance. To update Inventory Enterprise 11.0 with the changes in the quantity of the substance stored in a container:

1. Select the location in the Location Tree frame that contains the required container.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Change Qty** from the **Update** menu in the Container Details frame. The **Change Amount Remaining in an Inventory Container** window appears.

   NOTE: For information about the fields available in the Change Amount Remaining in an Inventory Container window, see ""Inventory Enterprise 11.0 form fields" on page 114.
4. Type the quantity that is removed from the container in the **Quantity Removed** text box.
5. Click **OK**. Observe that the value of the **Qty Available** field in the Container Details frame changes according to the value provided in the **Quantity Removed** text box.

   NOTE: You can also change the quantity by specifying a value in the Quantity Remaining text box instead of specifying the value in the Quantity Removed text box.

CHANGE STATUS

You can change the status of a container, if required. For example, you can change the status of a container to Empty if the substance stored in the container finishes.

To change status of a container:

1. Navigate to the location in the Location Tree frame that contains the desired container.
2. Click the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Change Status** from the **Update** menu in the Container Details frame. The **Change Container Status** window appears.
4. Select the appropriate status from the **Container Status** drop down list.

5. Click **OK**.

EDIT CONTAINER

To edit a container:

1. Navigate through the Location Tree frame, to reach to the location that contains the container, which is to be edited.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Edit Container** from the **Update** menu in the Container Details frame. The **Create or Edit an Inventory Container** window, displaying the container information in the edit mode, appears.

   NOTE: To see if you have the appropriate privileges to edit a container, see "Roles" on page 119 and "Privileges" on page 120.

4. Click the appropriate tab and make the required changes.
5. Click **OK**.

   NOTE: For more information about the tabs in the Create or Edit an Inventory Container window, see "Creating a new container" on page 24.

MOVE CONTAINER

You can move a container to store the container at a location other than the current location of the container. To see if you have appropriate privileges to move a container, see "Roles" on page 119 and "Privileges" on page 120.

To move a container:

1. Navigate through the Location Tree frame to reach to the location that contains the container, which is to be moved to a different location.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Move Container** from the **Update** menu in the Container Details frame. The **Move Inventory Container** window appears.
4. Specify the destination location for the container either by typing the location ID in the **Destination Location** text box or by using the **Browse** link.
5. Click **OK**. Navigate to the specified destination location and ensure that the container has been moved there.

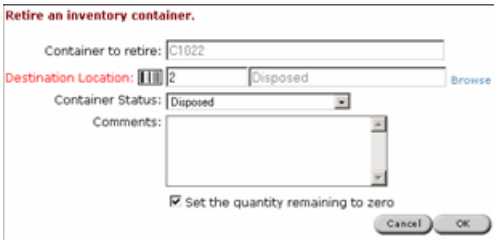
RETIRE CONTAINER

When you retire a container, the container is not deleted, but is moved to the Disposed location. This action is performed on the containers that are no longer in use. For example, you can retire a container if the substance stored in it has expired. When a container is retired, its status automatically changes to disposed. To see if you have appropriate privileges to retire a container, see "Roles" on page 119 and "Privileges" on page 120.

To retire a container:

1. Navigate through the Location Tree frame to reach to the location that contains the container, which is to be retired.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Retire Container** from the **Update** menu in the Container Details frame. The

Retire an Inventory Container window appears as:



NOTE: For information about the fields available in the Retire an Inventory Container dialog box, see "Inventory Enterprise 11.0 form fields" on page 114.

4. Observe that by default, both the **Container Status** drop down list and **Destination Location** text box are set to **Disposed**.
5. Click **OK** to retire the container.

DELETE CONTAINER

The Delete Container feature lets you delete a container and move it to Trash Can. You can delete the contents of Trash Can using the Empty Trash link that is displayed in the Container List frame when Trash Can is selected in the Location Tree frame. To see if you have the appropriate privileges to delete a container, "Roles" on page 119 and "Privileges" on page 120.

To delete a container:

1. Navigate through the Location Tree frame to reach to the location that contains the container, which is to be deleted.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Delete Container** from the **Update** menu in the Container Details frame. The **Delete an Inventory Container** window appears.
4. Click **OK** to delete the container. Observe that the deleted container is moved to Trash Can.

COPY CONTAINER

The Copy Container feature lets you create a container, the properties of which are same as an already existing container. To see if you have appropriate privileges to copy a container, see "Roles" on page 119 and "Privileges" on page 120.

To copy a container:

1. Navigate through the Location Tree frame to reach to the location, which contains the desired container.
2. Select the desired container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Copy Container** from the **Create** menu in the Container Details fame. The **Create or Edit an Inventory Container** window appears.
4. Observe that the dialog box is already populated with the data of the original container.
5. Edit the information that should differ from the original container, such as lot number, container cost, and expiration date, on the respective tabs.
6. Click **OK**.

NOTE: For more information about the tabs in the Create or Edit an Inventory Container dialog box, see "Creating a new container" on page 24.

SPLIT CONTAINER

When you split a container, all the contents of the original container are transferred to the new containers and the original container is discarded. To see if you have the appropriate privileges to split a container, see “Roles” on page 119 and “Privileges” on page 120.

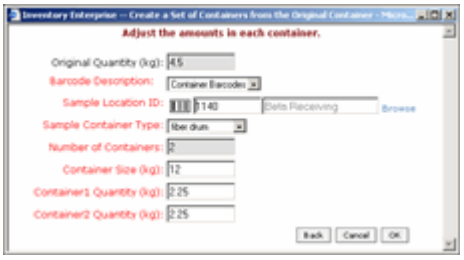
To split a container:

1. Navigate through the Location Tree frame to reach to the location that contains the container, which is to be splitted into multiple containers.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Split Container** from the **Create** menu in the Container Details frame. The **Create a Set of Containers from the Original Container** window appears as:

4. Perform the following tasks in the Create a Set of Containers from the Original Container window:

- Select **Container Barcodes** from the **Barcode Description** drop down list.
- Specify the location where you want to store the new containers, in the **Sample Location ID** text box.
- Select the container type from the **Sample Container Type** drop down list.
- Specify the number of new containers that you want to create from the original container, in the **Number of Containers** text box.
- Specify the size of the new containers in the **Container Size** text box.

5. Click **Next**. The following window appears as:



6. Specify the amount of the original container content that is to be transferred to each new container, in the respective **Container Quantity** text boxes.

NOTE: While specifying the container quantity for new containers, make sure that the sum of quantities of the contents of the new containers is exactly equal to the quantity of the content of the original container.

7. Click **OK**. Observe that the new containers with the specified quantity and size are created at the specified location.

CREATE SAMPLES

The create sample functionality allows aliquots from original container to be stored and tracked in new containers. The parent container quantity is automatically decremented after the aliquot is taken. The aliquots lineage can be traced back to the parent container. To see if you have the appropriate privileges to create samples, “Roles” on page 119 and “Privileges” on page 120.

To sample a container:

1. Navigate through the Location Tree frame to reach to the location that contains the container, which is to be sampled.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Create Samples** from the **Create** menu in the Container Details frame. The **Create Samples from the Original Container** window appears as:

4. Perform the following tasks in the **Create Samples from the Original Container** window:

- Select **Container Barcodes** from the **Barcode Description** drop down list.
- Specify the location where you want to store the new containers in the **Sample Location ID** text box.
- Select container type from the **Sample Container Type** drop down list.
- Specify the number of new containers that you want to create from the original container, in the **Number of Samples** text box.
- Specify the size of the new containers in the **Container Size** text box.
- Select the **Adjust individual container quantities** check box, if you want the containers to store varied amount of substance.

5. Click **Next**. Another window of the **Create Samples from the Original Container** window, asking you to adjust quantities of substance in each new container, appears as:

NOTE: The Quantity Remaining text box in this window contains the quantity that will be left in the original container after the samples have been created.

6. Edit the **Sample Quantity** text boxes, if required, and click **OK**. Observe that the new containers with the specified quantity and size are created at the specified location.

REORDER CONTAINER

The Reorder Container feature lets you order an already ordered or already existing container.

NOTE: You can use the Reorder Container feature only if supplier information is already entered in the original order. Specifically, the supplier ID and part number should be filled in.

If you want to order a container that does not exist in Inventory Enterprise 11.0, see "Order container" on page 23. To see if you have appropriate privileges to reorder a container,

see “Roles” on page 119 and “Privileges” on page 120.

To reorder a container:

1. Navigate through the Location Tree frame, to reach to the location that contains the required container.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Reorder Container** from the **Create** menu in the Container Details frame. The **Reorder a Container** window appears.

   NOTE: For information about the fields available in the Reorder a Container window, see “Inventory Enterprise 11.0 form fields” on page 114.

4. Enter appropriate information about the reordered container in the respective fields.
5. Click **OK**.

CHECK OUT

You can use the Check Out feature to remove a container from its current location for subsequent use at a different location. You can also modify the current user and status of the container while checking it out. To see if you have the appropriate privileges to check out a container, see “Roles” on page 119 and “Privileges” on page 120.

To check out a container:

1. Navigate to the location that contains the container, which is to be checked out, using the Location Tree frame.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Check Out** from the **Obtain** menu in the Container Details frame. The **Check out/ in an Inventory Container** window appears.

   NOTE: For information about the fields available in the Check out/in an Inventory Container dialog box, see “Inventory Enterprise 11.0 form fields” on page 114.

4. Specify the destination location for the container either by typing the location ID in the **Destination Location** text box or by using the **Browse** link.
5. Select from the **Current User** drop down list to change the current user of the container.
6. Select from the **Container Status** drop down list to change the status of the container.
7. Click **OK**. Observe that the container is checked out to the specified location.

CHECK IN

Checking in lets you restore the checked out container to its original location and assign it to its original user again, even if you do not remember the original location and original user of the container. To see if you have the appropriate privileges to check in a container, see “Roles” on page 119 and “Privileges” on page 120.

To check in a checked out container:

1. Navigate to the location that contains the container, which is to be checked in by using the Location Tree frame.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.

3. Select **Check In** from the **Obtain** menu in the Container Details frame. The **Check out/in an Inventory Container** window appears as:

NOTE: For information about the fields available in the Check out/in an Inventory Container window, see "Inventory Enterprise 11.0 form fields" on page 114.

4. Observe that the **Destination Location** text box and **Current User** drop down list are already populated with the original location and original user of the container.
5. Select from the **Container Status** drop down list to modify the status of the container.
6. Click **OK**. Observe that the container is moved to its original location.

REQUEST CONTAINER

The Request Container feature lets you place a request for a container and get the container delivered at the desired location. You cannot request a container if a request has already been made for it.

To request a container:

1. Navigate through the Location Tree frame to reach to the location that contains the container, which is to be requested.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Request** from the **Obtain** menu in the Container Details frame. The **Request Samples from an Inventory Container** window appears.

NOTE: The Request an Inventory Container window is automatically populated with the information of the selected container.

4. Click the **Request this specific container** radio button.
5. Specify the location at which you want the container to be delivered in the **Delivery Location** text box.
6. Edit other information, if required, and click **OK**.
7. Click **OK** in the window, which confirms that the request has been processed.

When a request is made for a container, a Requests tab is added to the Container Details frame for that container. The Requests tab provides all the information about the request placed for the container. For information about editing or deleting a request, see "Requests tab" on page 51.

REQUEST SAMPLE

Request Sample feature lets you request an aliquot from a container or batch of the containers. This feature can be used only when batching fields are set.

If the container from which you are requesting samples does not contain enough quantity, the request is fulfilled from other containers in the same batch. However, the request is not fulfilled completely if other containers in the same batch also do not contain enough quantity or such containers do not exist. For example, if you request two 1 liter samples from a container containing only 1 liter of substance

and no other container in the same batch exists, then only single 1 liter sample is created.

NOTE: If you cannot find the Request Sample menu item within the Request menu in the Container Details frame, see your system administrator.

NOTE: To request a sample after performing a batch search, you need to click the Request link in the Batch search result and follow the steps after step 3.

To request samples from a container:

1. Navigate through the Location Tree frame to reach to the location that contains the desired container.
2. Click the desired container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Request** from the **Obtain** menu in the Container Details frame. The **Request Samples from an Inventory Container** window appears.
4. Perform the following tasks in the preceding window:

- Click the **Request a sample from this batch** radio button.
- Select the delivery location using the Browse link.
- Type the quantity of sample required.

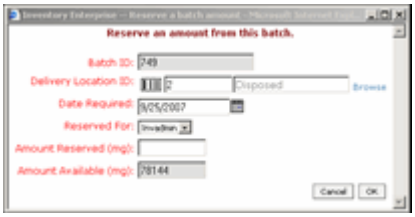
5. Click **OK**. A **Requests** tab is added to the Container Details frame.

The requests tab lets you gather details about the sample request or edit or cancel the sample request.

RESERVE SAMPLE

To reserve a sample:

1. Create an organization. See "Managing organizations" on page 111 for details.
2. Perform a batch search operation.
3. Click the **Reserve** link. The **Reserve a batch amount** window appears as:



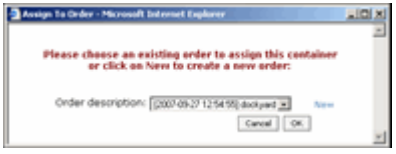
4. Enter required information and click **OK**. A success message appears.
5. Click **OK** to close the preceding window.

ASSIGN TO ORDER

The Assign to Order feature lets you assign a container to an existing order. You can also create a new order using this feature.

To assign a container to an existing order:

1. Select the container to be assigned, in the Container List frame.
2. Select **Assign to Order** from the **Other** menu in the Container Details frame. The **Assign To Order** window appears as:



NOTE: The preceding window appears only if there is one or more existing orders. If there is no existing order, the Manage Order window appears.

3. Click **OK**. A success message appears.
4. Click **OK**.

CREATING A NEW ORDER

To create a new order using the Assign to Order feature:

1. Click the **New** link in the **Assign To Order** window. The **Manage Order** window appears as:

2. Specify the delivery location using the **Browse** link.
3. Specify the name of the order in the **Ship To** text box.
4. Provide the address details using the **Edit Address** link.
5. Click **OK**. A success message appears.
6. Click **OK**. The **Assign To Order** window appears. You can view the newly created order in the **Order description** drop down list.

CERTIFY CONTAINER

To certify a container:

1. Navigate through the Location Tree frame to reach to the location that contains the required container.
2. Select the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Certify Container** from the **Other** menu in the Container Details frame. The **Certify an Inventory Container** window appears as:

NOTE: The Certify Container link is in the disabled state if the container selected in the Container List frame is already certified. You can determine whether a container is already certified or not by checking whether a certification date is specified for the container. If you cannot find the Certify Container menu item within the Other menu in the Container Details frame, see your system administrator.

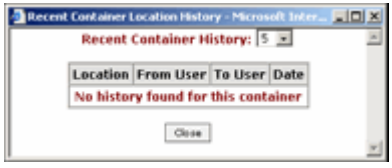
4. Type the recertification interval in the **Recertification Interval (months)** text box. The value entered in this text box is used to calculate the recertification date for the container.
5. Click **OK**.

HISTORY

Whenever you move a container to a new location or change its current user, Inventory Enterprise 11.0 saves the information about the previous users or locations of the container. You can access this information by viewing the container history.

To view container history:

1. Navigate to the location that contains the desired container.
2. Click the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **History** from the **Other** menu in the Container Details frame. The **Recent Container Location History** window, displaying the container history, appears as:



4. Select an appropriate value from the **Recent Container History** drop down list to specify how many entries are to be displayed in the history list at a time.
5. Click **OK**. Additional entries will be displayed in the history list, if the history list contains more entries than the default value specified in the **Recent Container History** drop down list.

LINEAGE

The Lineage link lets you determine the complete hierarchy of a container. When you select a container in the Container List frame and click the Container Lineage link, a tree structure appears as:

The tree type structure contains the parent and child containers of the selected container, if any. It also contains all other containers having same parent container as the selected container. In addition, the tree structure lets you determine if the parent container of the selected container also has a parent.

PRINT LABEL

The Print Label function lets you generate barcode for a container. A barcode is a special type of report that can provide information about any attribute associated with a container.

To generate barcode for a container:

1. Navigate through the Location Tree frame to reach to the location that contains the container for which you want to generate the barcode.
2. Click the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Print Label** from the **Other** menu in the Container Details frame. The **Print Container Labels** window appears as:

4. Select the appropriate layout for the report from the **Label Type** drop down list.

> *NOTE: Report layouts specify the format for a report and the information that is to be included in the report.*

5. Click the **Go** button. A warning message is displayed. The warning message informs you that the window, which will be displayed next possesses a security risk.
6. Click the **Yes** button to continue. The barcode for the selected container is displayed

in the lower frame of the **Print Container Labels** window:

You can print the container barcode by clicking the icon displayed in the lower frame of the **Print Container Labels** window.

MANAGE LINKS

The Manage Links function lets you associate links with a container. You can manage links associated with a container in the Manage Links window, which is displayed when you click the Manage Links link. In the Manage Links window, you can perform the various tasks, which are:

- Create a new link
- Edit a link
- Delete a link

NOTE: You can access the Manage Links link from the Summary and Substance tab windows of the Container Details frame.

Creating a new link

To create a new link:

1. Navigate through the Location Tree frame to reach to the location that contains the container with which a link is to be associated.
2. Click the appropriate container in the Container List frame. The details of the container are displayed in the Container Details frame.
3. Select **Manage Links** from the **Other** menu. The **Manage Links** window appears as:

4. Click the **New** link. The **Create/Edit/Delete an Inventory Link** window appears.
5. Enter the URL of the link in the **URL** text box.
6. Enter the text for the link in the **Link Text** text box.
7. Click **OK**.

Editing a link

To edit a link:

1. Click the **Edit** link corresponding to the link that is to be edited, in the **Manage Links** window. The **Create/Edit/Delete an Inventory Link** window, containing the link information in the edit mode, appears.
2. Make the required changes and click **OK**.

Deleting a link

To delete a link:

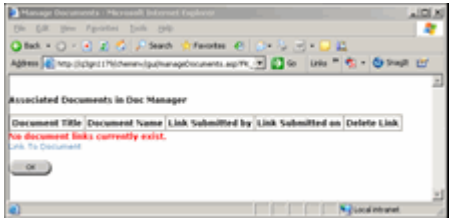
1. Click the **Delete** link corresponding to the link that is to be deleted, in the **Manage Links** window. The **Create/Edit/Delete an Inventory Link** window, asking you to confirm the deletion action, appears.
2. Click **OK**.

MANAGE DOCUMENTS

The Manage Documents feature lets you associate the Inventory Enterprise application with documents in Doc Manager Enterprise.

To associate a document:

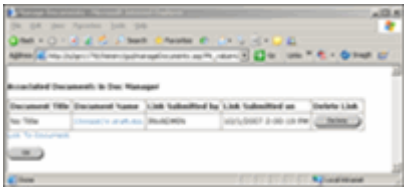
1. Select **Manage Documents** from the **Other** menu in the Container Details frame. The **Manage Documents** window appears as:



2. Click the **Link To Document** link. The **Document Search** window appears as:

3. Search for a document. The **Document Search Results** window appears as:

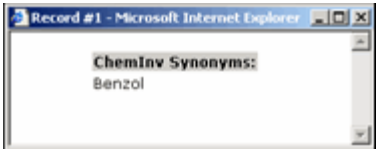
4. Click the **Add Doc Link** button corresponding to the document to be associated. The following window appears as:



NOTE: You can delete an associated document by clicking the Delete button corresponding to the document.

SYNONYMS

The Synonyms link is available in the Substance tab of the Container Details frame. When you click the Synonyms link, a list of all the synonyms associated with the substance stored in the container is displayed:



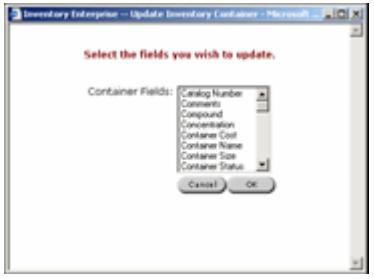
The Synonyms link does not allow you to add new synonyms or edit or delete existing synonyms. For information about adding new synonyms or editing or deleting existing synonyms, see “Managing synonyms” on page 14.

UPDATE CONTAINERS

The Update Containers link is available in the Update menu of the Container Details frame only when the Container List frame is in the multi-select mode. To view the Container List frame in the multi select mode, you need to click the Multi-Select link in the Container List frame.

The Update Containers link lets you update multiple containers, at once. To update multiple containers using the Update Containers link:

1. Navigate through the Location Tree frame to reach to the location, which contains the desired containers.
2. Select **Multi-Select** from the **View** menu in the Container List frame.
3. Select the check box next to the desired container(s).
4. Select **Update Containers** from the **Update** menu in the Container Details frame. The **Update Inventory Container** window appears as:



5. Select the field that is to be updated in the **Container Fields** list box.

NOTE: You can also select multiple fields in the Container Fields list box. To select multiple fields, you need to hold down the CTRL key.

6. Click **OK**. The following window, asking you to enter values for the fields selected in the **Container Fields** list box, appears as:

NOTE: The preceding window displays only those fields, which you have selected for updating.

7. Enter the appropriate values in the respective fields and click **OK**.

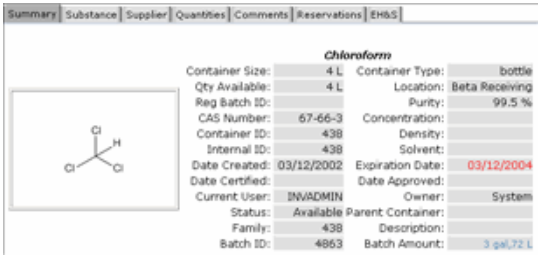
Container Details frame tabs

The Container Details Frame tabs are:

- Summary tab
- Substance tab
- Supplier tab
- Quantities tab
- Comments tab
- Reservations tab
- Requests tab
- Other tab
- EHS tab

SUMMARY TAB

The Summary tab of the Container Details frame provides key details of the container and its contents. The following figure displays the Summary tab window:



The value displayed in the Batch Amount field is in the form of a hyperlink. On clicking this link, the View Batch Information window is displayed. In this window, you can view detailed information about the batch and the list of containers in the batch. The View Batch Information window also provides links to edit

batch information and manage batch links. For more information about managing links, see “Managing links” on page 14.

For information about the fields available in the Summary tab window, see “Inventory Enterprise 11.0 form fields” on page 114.

If ChemACX is integrated with Inventory, the Summary tab window displays the ACX link. This link lets you view the ACX record associated with the substance stored in the container. To view these links in the Summary tab window, see your system administrator.

SUBSTANCE TAB

The Substance tab provides information about the substance stored in the container. The following figure displays the Substance tab window:

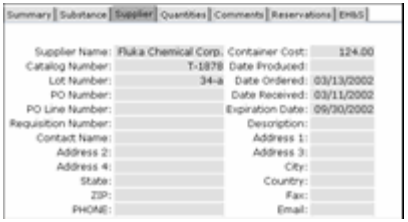
NOTE: The Substance tab displays the Manage Substances link. Clicking on this link will open the Create or Edit Substance in Inventory for.

For information about the fields available in the Substance tab window, see “Inventory Enterprise 11.0 form fields” on page 114.

The Substance tab window contains two links, Manage Links and Synonyms. The Manage Links link lets you associate links with the container. The Synonyms link lets you obtain a list of all the synonyms associated with the substance stored in the container. For more information about the Manage Links and Synonyms links, see “Managing links” on page 14 and “Managing synonyms” on page 14.

SUPPLIER TAB

The Supplier tab provides information about the supplier of the container. It may also provide transaction information, such as container cost and date of production. The following figure displays the Supplier tab window:



For information about the fields available in the Supplier tab window, see “Inventory Enterprise 11.0 form fields” on page 114.

QUANTITIES TAB

The Quantities tab provides information about the quantity of the substance stored in the container and the weight of the container. The following figure displays the Quantities tab window:

For information about the fields available in the Quantities tab window, see “Inventory Enterprise 11.0 form fields” on page 114.

COMMENTS TAB

The Comments tab provides additional information about the container, such as handling

procedures and storage conditions. The following figure displays the Comments tab window:

For information about the fields available in the Comments tab window, see "Inventory Enterprise 11.0 form fields" on page 114.

RESERVATIONS TAB

You can reserve the substance stored in a container if you think you may require the substance in the near future, but there are chances that the container may empty. The Reservations tab lets you reserve the substances stored in a container and gather information about the existing reservations. You can also edit and delete the existing reservations using the Reservations tab.

To see if you have the appropriate privileges to create, edit, or delete a reservation, see "Roles" on page 119 and "Privileges" on page 120.

The following figure displays the Reservations tab window:

For information about the fields available in the Reservations tab window, see "Inventory Enterprise 11.0 form fields" on page 114.

Creating a new reservation

To create a new reservation:

1. Click the **New** link in the **Reservations** tab window. The **Create a New Inventory Reservation** window appears as:

2. Specify the amount of substance that you want to reserve, in the **Quantity** text box.
3. Click **OK**.
4. Click the **Summary** tab in the Container Details frame. Observe that the quantity in the **Qty Available** field has changed according to the amount specified in the **Quantity** text box.

Editing a reservation

To edit a reservation:

1. Click the **Edit** link next to the reservation that is to be edited, in the **Reservations** tab window. The **Create a New Inventory Reservation** window appears.
2. Make the required changes in the reservation information and click **OK**. Observe that the changes are reflected in the **Reservations** tab.

Deleting a reservation

To delete a reservation:

1. Click the **Delete** link next to the reservation that is to be deleted, in the **Reservations** tab window. The **Create a New Inventory Reservation** window, asking you to confirm the deletion of the reservation, appears.
2. Click **OK** to delete the reservation.

REQUESTS TAB

The Requests tab displays information about the container and sample requests placed for a

container. For information about requesting container and sample, see “Request container” on page 43.

The Requests tab is displayed only for those containers that have a pending request associated with them. The following figure displays the Requests tab window:

A user can edit or delete/cancel a request using the Requests tab.

Editing a request

To edit a request:

1. Click the **Edit** link next to the request, in the **Requests** tab window. The **Request an Inventory Container** window, displaying the request information in edit mode, appears.
2. Make the required changes and click **OK**.

Deleting or canceling a request

The deletion action is performed for the container requests and the cancellation action is performed for the sample requests. To delete or cancel a request:

1. Click the **Delete** or **Cancel** link next to the request, in the **Requests** tab window. A window asking you to confirm the deletion or cancellation action appears.
2. Click **OK**.

NOTE: Only those sample requests that have their status as either New or Approved can be cancelled.

OTHER TAB

The Other tab displays the customized container fields. For example, if the system administrator has created two customized container fields, Boiling Point and Melting Point in Inventory Enterprise 11.0 then the following Other tab window appears as:

If you can not view the Other tab in the Container Details frame, see your system administrator.

EH&S TAB

You can view the Environmental Health and Safety (EH&S) tab in the Container Details frame only if the DISPLAY_EHS_DATA parameter is set in the Invconfig.ini file. Also, to edit EH&S data, you need to have the appropriate privilege. To see if you have the appropriate privileges to view and edit EH&S data, see “Roles” on page 119 and “Privileges” on page 120.

The following figure displays the EH&S tab window:

The EH&S tab is customizable by the system administrator. Therefore, the fields shown in the preceding figure may or may not exist in your EH&S tab. For more information about the fields in the EH&S tabs, see your system administrator.

You can record the EH&S information at two levels, which are:

- 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, as well as recorded substance level EH&S data.

Managing batching fields

Batching is a feature in Inventory Enterprise 11.0 that lets you relate containers based on arbitrary fields, including the custom fields. The fields, based on which containers are related, are called batching fields and a group of related containers is called a batch. All the containers in a particular batch have the same batch id.

Batching is controlled via a GUI interface, which facilitates searching, requesting, and reserving of samples in batches. After you have classified the containers into batches, you can search for containers in a particular batch. For example, you can create batches based on the status of the containers so that the containers with status, 'available' will be in one batch while the containers with status, 'backordered item' will be put in another batch. Therefore, later on you can easily search for the 'available' containers based on their status.

Managing batching fields involves specifying the field/fields based on which the containers are to be grouped in batches and updating the container details thereafter.

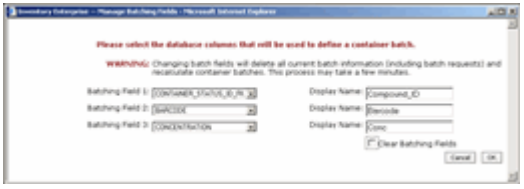
NOTE: You can also create batches of containers to which no structure has been assigned.

To manage batching fields:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.

   NOTE: You can also access the Administrative Menu window by clicking the Tasks link in the menu bar of the Inventory Enterprise 11.0 home page.

2. Click the **Manage Batching Fields** link in the **Inventory Management** section. The **Manage Batching Fields** window appears as:

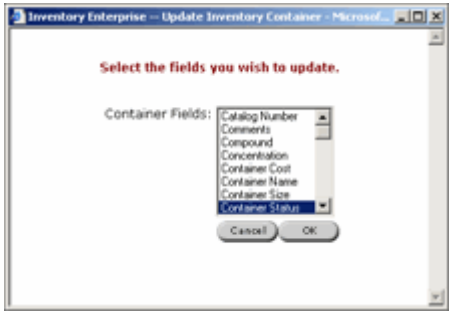


3. Select **CONTAINER_STATUS_ID_FK** in the **Batching Field 1** drop down list.

   NOTE: You can select up to three columns as the batching fields.

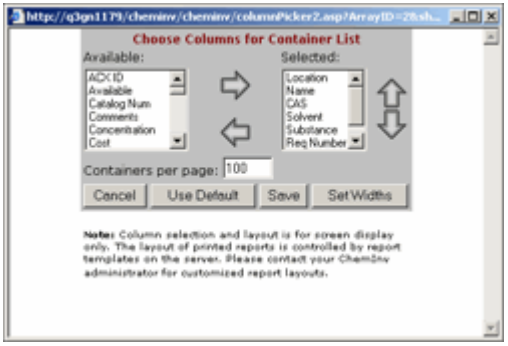
4. Type the display name of the selected batching fields in the **Display Name** text box.

5. Click **OK** to display a window informing you that the batching fields have been updated.
6. Click **OK** to display the **Administrative Menu** window.
7. Click the **Close** button to close the **Administrative Menu** window.
8. Click the **Browse** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The Inventory Enterprise 11.0 home page appears.
9. Create a few containers.
10. Select the **Multi - Select** menu item from the **View** menu in the menu bar of the Container List frame.
11. Select the first two containers.
12. Select **Update Containers** from the **Update** menu in the Container Details frame. The **Update Inventory Container** window.
13. Select **Container Status** from the **Container Fields** list box, as shown in this figure:



14. Click **OK**. The following window appears as:

15. Select **Backordered Item** in the **Container Status** drop down list.
16. Click **OK** to close the **Update Inventory Container** window.
17. Select **Column Chooser** from the **View** menu in the menu bar of the Container List frame. The following window appears as:



18. Select **Status** in the **Available** list box and click the right arrow button to display it in the **Selected** list box.
19. Click the **Save** button to close the window and display the list of containers in the Inventory Enterprise 11.0 home page.
20. Click all the containers one by one, and observe that the first two containers whose status is 'Backordered Item' are grouped into one batch (with the same batch id) whereas the remaining containers are grouped into a different batch because their status is 'Available'.

Ordering and receiving containers

The ordering and receiving feature lets you place an order for a container through ChemACX and get it delivered to the desired Inventory location, which is set as default. Therefore, it is important that the user trying to order a container has set a default location. To set a location as the default location, see “Make default” on page 18.

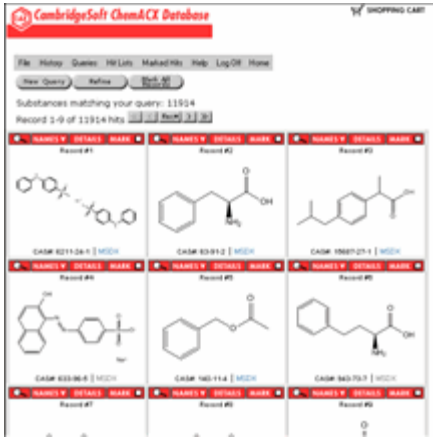
Placing an Order

Placing an order involves searching compounds through ChemACX and filling the shopping cart.

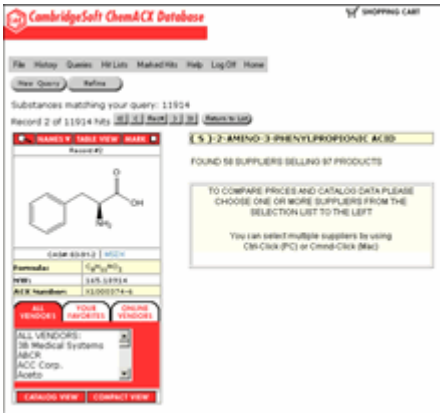
To place an order:

1. Log on to the ChemACX application. The following window appears as:

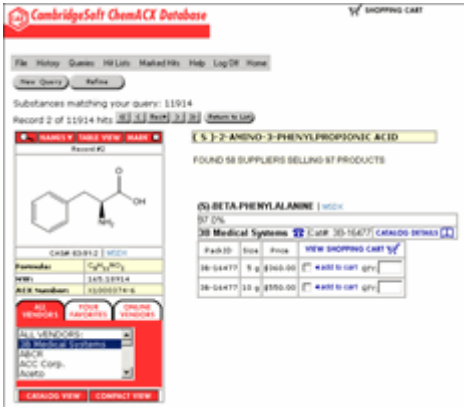
2. Search the chemical that is to be added to the shopping cart. The following window appears as:



3. Click **Details** for any of the compounds. The following window appears as:



4. Select an item in the **All Vendors** list. The following window appears as:



5. Select the check box next to **add to cart** link, for the desired substances.
6. Click the **VIEW SHOPPING CART** icon in the ChemACX interface. The **Shopping Cart**

Frameset window, displaying all the added items, appears as:

7. Click the **Send to Inventory Manager** button. A confirmation screen appears as:

8. Specify the destination location using the **Browse** link.

NOTE: Regardless of the destination location you specify, by default, the ordered container is displayed within the "On Order" location in Inventory Enterprise. If required, you can change this behavior so that the ordered container is displayed under the specified destination location. This is achieved by configuring a parameter within the invconfig.ini file.

9. Specify the project name, due date, and reason for ordering.

NOTE: When the invconfig,ini file is configured to change the default behavior of the ordering process, ChemACX does not prompt you to enter the order details mentioned in this step. The only fields that should appear on the confirmation screen of ChemACX form are the destination location and the owner.

10. Click **OK**. The following window appears as:

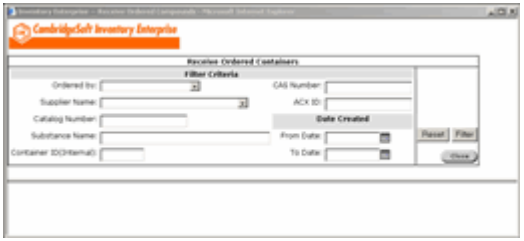
11. Click the **Commit** link. The following window appears as:

12. Click the **View** link. The ordered container is displayed in the Container Management area. The container is in **On Order** location.

Receiving an order

To receive the placed order:

1. Open the **Administrative Menu** window.
2. Click the **Manage Container Receiving** link in the **Container Management** section. The **Receive Ordered Compounds** window appears as:



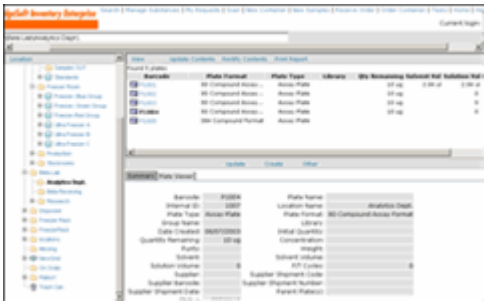
3. Specify a filter criteria, such as CAS Number and click the **Filter** button. The following window appears as:

4. Specify a scan barcode for the container to be received.
5. Click the last **OK** button. The status of the container changes to **Received**.
6. Click the **Close** button to close the window.

Plate Inventory

Plates can be defined as means of holding multiple compounds in an easily transportable unit. In Inventory Enterprise 11.0, plates are analogous to containers. Similar to containers, plates are held in locations and can be managed in the same way as containers are managed.

Like containers, plates are also managed in the Container Management area of Inventory Enterprise 11.0. However, the Container List frame and Container Details frame of the Container Management area are termed as Plate List frame and Plate Details frame when they are used to manage plates instead of the containers. The following figure displays the Container Management area containing plates:



In the preceding figure, the top right frame is the Plate List frame and the bottom right frame is the Plate Details frame. For information about the links and tabs available in the Plate List and Plate Details frames, see "Viewing contents of a plate" on page 61.

Creating a new plate

In Inventory Enterprise 11.0, plates can be created in various ways, which are:

- Using Excel spreadsheet
- Using text file
- Using Inventory Loader

NOTE: Using Inventory Loader for creating plates is described in "Loading compounds into plates" on page 83.

Creating a plate from Excel spreadsheet

You can create plates from the data contained in an Excel spreadsheet. The conditions wherein it is useful to create plates from the Excel spreadsheet are:

- You need to reformat the plates, especially when you want to merge the 4 96 well plates into 1 384 well plate. You can per-

form this action using the 4 96 Well to 1 384 Well Map template.
- You need to create multiple daughter plates in single step. You can perform this action using the Daughter template.

NOTE: If you want to daughter only one plate from the parent plate, you should create the daughter plate using the Create Daughter Plates link in the Plate Details frame.

The columns in the Excel spreadsheet that is used in this section, are:

- No: Specifies a sequential number corresponding to each parent plate.
- Quadrant 1, Quadrant 2, Quadrant 3, Quadrant 3: Specify barcodes of the parent plates.
- Plate Format: Specifies format of the target plates.
- Plate Type: Specifies type of the target plates.
- Plate Template: Specifies name of the plate maps from which the target plates are to be created.
- Barcode: Specifies barcode of the target plates.
- Copies: Specifies the number of copies that are to be created for the target plates.
- Assign to Library: Specifies the library to which the target plates are to be assigned.
- Place in Location: Specifies the location at which the target plates are to be stored.
- Status: Specifies the status that is to be assigned to the target plates.

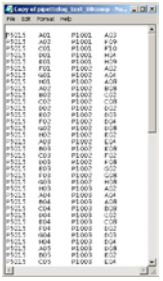
To create plates from an Excel spreadsheet:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.
2. Click the **Create Plates from Excel** link. The **Create Plates From Excel** window appears as:

3. Click the **Browse** button and locate the Excel spreadsheet from which the plates are to be created.
4. Click **OK**. Observe that the new plates are created at the specified location.

Creating a plate from text file

Inventory Enterprise 11.0 lets you create plates from the data contained in a text file. The following figure displays a sample text file that can be used to create plates in Inventory Enterprise 11.0:



The preceding text file consists of one header line and four columns. The four columns of the text file are:

- Target plate barcode: Specifies barcode of the target plate.
- Target well coordinates: Specifies coordinates of the wells of the target plate.

- Source plate barcode: Specifies barcode of the source plate.
- Source well coordinates: Specifies coordinates of the wells of the source plate.

To create a plate from a text file, you should have a Plate Import template for the text file. For information about already existing Plate Import templates, see “Plate import templates” on page 108.

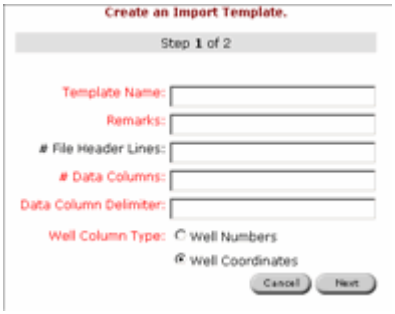
However, if the template is not available already, you can create a new Plate Import template for the text file.

CREATING NEW PLATE IMPORT TEMPLATE

To create a Plate Import template for the preceding text file:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.
2. Click the **Plate Settings** link. The following window appears as:

3. Click the **New** link next to the **Plate Import Templates** drop down list. The following window appears as:



4. Perform the following tasks in the preceding window:

- Enter the name of the template in the **Template Name** text box.
- Enter remarks in the **Remarks** text box.
- Enter 1 in the **File Header Lines** text box.
- Enter 4 in the **Data Columns** text box, as the text file contains four columns.
- Enter tab in the **Data Column Delimiter** text box, as the text file is tab delimited.
- Select the **Well Coordinates** check box, as the text file contains well coordinates and not the well numbers.

5. Click **Next**. The preceding window is populated with some additional fields, as shown in this figure:

6. Perform the following tasks in this window:

- Select **Target Plate Barcode** from the **Column 1 Mapping** drop down list.
- Select **Target Well** from the **Column 2 Mapping** drop down list.
- Select **Source Plate Barcode** from the **Column 3 Mapping** drop down list.
- Select **Source Well** from the **Column 4 Mapping** drop down list.

7. Click **OK**. A window informing you that the template is created successfully appears.
8. Click **OK**.
9. Click the **Close** button.

After creating the Plate Import template for a text file, you can create two types of plates, which are:

- Target plates: Refers to the plates that are created from the plates existing already in Inventory Enterprise 11.0.
- Source plates: Refers to the new plates that are created with the new compounds, which do not exist in Inventory Enterprise 11.0 already. While creating a source plate, you cannot insert compounds in it.

CREATING A TARGET PLATE

To create a target plate from a text file:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.
2. Click the **Create Plates from Text File** link. The **Create Plates From Text File** window appears as:

3. Perform the following tasks in the **Create Plates From Text File** window:

- Select appropriate Plate Import template from the **Import Template** drop down list.
- Click the **Browse** button next to the **Text File** text box and locate the text file from which the plate is to be created.
- Click the **Browse** button next to the **Location ID** text box and select the location where the new plate is to be added.
- Select plate type from the **Plate Type** drop down list.
- Select plate format from the **Plate Format** drop down list.
- Select plate status from the **Plate Status** drop down list.

4. Click **OK**.

CREATING A SOURCE PLATE

To create a source plate from a text file:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.

2. Click the **Create Plates from Text File** link. The **Create Plates From Text File** window appears.
3. Select the **Create Source Plate(s)** radio button.
4. Set the fields in the **Create Plates From Text File** window in the similar manner as they are set for the target plates.
5. Click **OK**.

Searching for a plate

If you know the location of the plate you are looking for, you can search the plate using the Location Tree frame of the Container Management area.

To search a plate using the Location Tree frame:

1. Click the **Browse** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The Container Management area appears.
2. Navigate to the location that contains the required plate using the Location Tree frame.
3. Select the appropriate location. The plates contained in the selected location are displayed in the Plate List frame.

   NOTE: If the location selected in the Location Tree frame also contains containers, then you need to click the plates link in the Plate List frame to view the plates.

4. Click the appropriate plate in the Plate List frame to view its details in the Plate Details frame.

When you do not know the location of the plate you are looking for, you can search the plate using the search form, which lets you search the plate on the basis of various plate attributes, such as plate name and type. You can access this search form by clicking the Plate Search tab. The Plate Search tab can be accessed by clicking the Search link within the Inventory Enterprise section in the home page of ChemBioOffice Enterprise. You can also access the Plate Search tab by clicking the New Search link in the Current Location frame.

For more information about searching plates using the Plate Search tab, see “Plate search” on page 8.

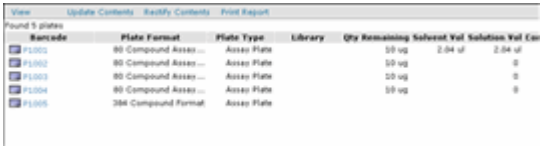
Viewing contents of a plate

After searching a plate either by navigating through the Location Tree frame or using the Plate Search tab, you can view the contents of the plate using the two frames of the Container Management area. The two frames are:

- Plate List frame
- Plate Details frame

Plate List frame

The Plate List frame displays all the plates and containers contained in the location selected in the Location Tree frame. The icons beside each plate enable you to distinguish the plates from the containers. The following figure displays the Plate List frame:



The Plate List frame consists of various columns that allow you to gather information about the key plate attributes, such as plate type and format. You can click a column to sort the plates displayed in the Plate List frame on the basis of the column. When you click a column, a icon is displayed next to the col-

umn name. This icon enables you to determine the sorting order for the plates.

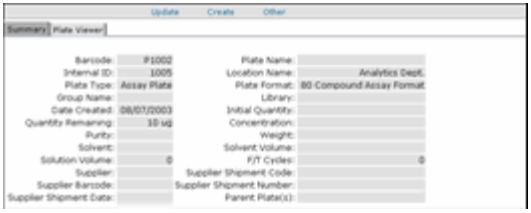
The Plate List frame provides several links for displaying the list of plates in different ways. These links are:

- View: Contains the following links:
  - Multi-Select: Enables you to select more than one plate. After selecting multiple plates, you can perform an action on all the plates simultaneously.
  - Large Icons: Displays large icons corresponding to the list of plates.
  - Small Icons: Displays small icons corresponding to the list of plates.
  - Details: Displays the Plate List frame in its default view, along with the plate details.
  - Column Chooser: Lets you customize the appearance of the Plate List frame. You can use the Column Chooser link to add or remove columns to or from the Plate List frame and set the width of the columns. You can also use Column Chooser to specify the number of plates that should be displayed in a window of the Plate List frame, at once.
- Update Contents: Verifies whether a plate is at the appropriate location. The Update Contents link does not allow you to update Inventory Enterprise 11.0.
- Rectify Contents: Verifies whether a plate is at the appropriate location. The Rectify Contents link also lets you update Inventory Enterprise 11.0.
- Print Report: Lets you generate reports containing information about all the plates displayed in the Plate List frame.

NOTE: The Update Contents link is not displayed in the Plate List frame if you do not have appropriate privileges to update the contents of a location. For information about whether or not you have privileges to update the contents of a location, see "Roles" on page 119 and "Privileges" on page 120.

Plate Details frame

The Plate Details frame displays detailed information about the plate selected in the Plate List frame. The following figure displays the Plate Details frame:



The Plate Details frame contains the Summary and Plate Viewer tabs to enable you to gather different information about the plate.

For information about the plate fields displayed in the Plate Details frame, see "Inventory Enterprise 11.0 form fields" on page 114.

The various links available in the Plate Details frame to allow you to perform different actions on a plate, are:

- Edit Plate
- Move Plate
- Dilute Plate
- Retire Plate
- Delete Plate

- Create Daughter Plates
- Create Plate Map
- Copy Plate
- Lineage
- Print Label
- Manage Links

Plate List frame functions

The Plate List frame functions are:

- Multi Select
- Large Icons
- Small Icons
- Details
- Column Chooser
- Update Contents
- Rectify Contents
- Print Report

MULTI SELECT

When you click the Multi-Select link from the View menu, the view of the Plate List frame changes and check boxes are placed beside all the plates displayed in the Plate List frame. This allows users to select multiple plates and perform single action on all the plates, simultaneously.

To move multiple plates to a different location:

1. Click the **Multi-Select** link from the **View** menu in the Plate List frame. The following view of the Plate List frame appears as:

NOTE: You can exit the multi select mode by clicking the Cancel MultiSelect link in the Plate List frame.

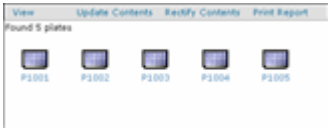
2. Select the check boxes next to the plates that are to be moved and select **Move Plates** from the **Update** menu in the Plate Details frame. The **Move an Inventory Plate** window is displayed.
3. Specify the destination location in the **Move an Inventory Plate** window.
4. Click **OK**.

The operations that can be performed on the plates selected in the multi select mode, are:

- Update Plates
- Move Plates
- Dilute Plates
- Retire Plates
- Delete Plates
- Reformat Plates
- Create Daughter Plates

LARGE ICONS

When you click the Large Icons link from the View menu in the Plate List frame, large sized icons are displayed corresponding to the plates listed in the Plate List frame, as shown in this figure:

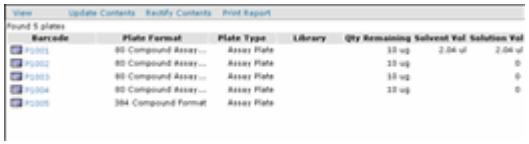


SMALL ICONS

When you click the Small Icons link from the View menu in the Plate List frame, the small sized icons are displayed corresponding to the plates listed in the Plate List frame, as shown in this figure:

DETAILS

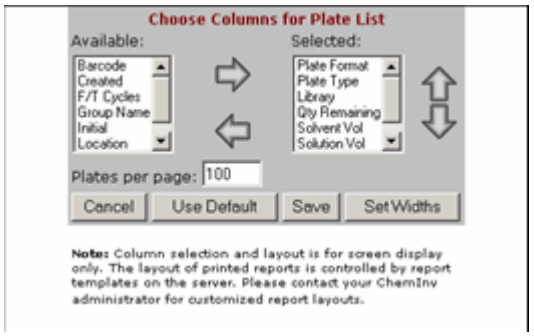
When you click the Details link from the View menu in the Plate List frame, the Plate List frame is displayed in its default view, as shown in this figure:



The default view of the Plate List frame consists of various columns that allow you to gather information about the key attributes of the plates listed in the Plate List frame.

COLUMN CHOOSER

When you click the Column Chooser link from the View menu in the Plate List frame, the following window appears as:



In the preceding window, you can perform the various tasks, which are:

- Add or remove columns from the Plate List frame
- Set number of plates to be displayed at a time
- Set column width

Adding or Removing Columns from the Plate List Frame

To add a column to the Plate List frame:

1. Select the appropriate column in the **Available** list.
2. Click the following icon to add the selected column to the **Selected** list:

3. Click the **Save** button.

To remove a column from the Plate List frame:

1. Select the appropriate column in the **Selected** list.
2. Click the following icon to remove the selected column from the Selected list: 
3. Click the **Save** button.

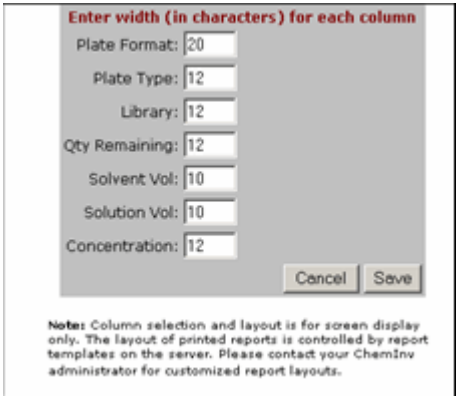
Setting plates per window

By default, a window of the Plate List frame can display 100 plates at a time. However, you can change the default setting by editing the Plates per window text box displayed in the above window.

Setting column width

To set the width of the columns in the Plate List frame:

1. Click the **Set Widths** button. The following window, displaying a list of the columns contained in the Plate List frame, appears as:



2. Set the width of the columns, as required, and click the **Save** button.

UPDATE CONTENTS

There are situations when the locations of the plates are changed, but Inventory Enterprise 11.0 is not updated with the changes. This results in discrepancies in Inventory Enterprise 11.0. The update content feature of Inventory Enterprise 11.0 lets you check for these discrepancies and verify whether a plate is at the location where Inventory Enterprise 11.0 thinks it is.

However, unlike the Content Rectification feature, the update contents feature does not allow you to correct these discrepancies. It lets you move the plates that are not present at a location, but should be there, to that location. However, it does not allow you to move the plates that are present at the location, but should not be there, to the Missing location.

To update the contents of a location:

1. Navigate to the location contents of which are to be updated using the Location Tree frame.
2. Click the **Update Contents** link in the Plate List frame. The **Reconcile Location** window appears as:

NOTE: The lower frame of the Reconcile Location window contains a list of plates that are expected to be there at the selected location.

3. Type the barcode of the plate, whose availability is to be verified, in the **Scan Barcode** text box.
4. Press the **Tab** key.
5. Observe that if the scanned plate is available at the location, the check box next to the plate, in the list of plates that are expected to be there at the location, gets selected. However, if the scanned plate is not available at the location, the plate is added to the list of the misplaced plates.
6. Repeat steps 3 and 4 for all the plates, whose availability is to be verified.

NOTE: Clear the check box next to the misplaced plate, if you do not want to move it to the location, contents of which are being updated.

7. Click **OK**.

RECTIFY CONTENTS

There are situations when the locations of the plates are changed, but Inventory Enterprise 11.0 is not updated with the changes. This results in discrepancies in Inventory Enterprise

11.0. The content rectification feature of Inventory Enterprise 11.0 lets you verify that a plate is at the location where Inventory Enterprise 11.0 thinks it is. Unlike the Update Content feature, it also lets you correct these discrepancies and update Inventory Enterprise 11.0.

The content rectification feature should be used on quarterly or biannual basis during official reconciliation efforts. After rectifying the content of a location, you can perform various tasks, which are:

- Move the plates that are not present at a location, but should be there, to that location.
- Move the plates that are present at a location, but should not be there, to the Missing location.

To rectify contents:

1. Navigate to the location, the contents of which are to be rectified.
2. Click the **Rectify Contents** link in the Plate List frame. The **Reconcile Location** window appears.

   NOTE: The lower frame of the Reconcile Location window contains a list of plates that are expected to be there at the selected location.

3. Type the barcode of the plate, whose availability is to be verified, in the **Scan Barcode** text box.
4. Press the **Tab** key.
5. Observe that if the scanned plate is available at the location, the check box next to the plate, in the list of plates that are expected to be there at the location, gets selected. However, if the scanned plate is not available at the location, the plate is added to the list of the misplaced plates.
6. Repeat steps 3 and 4 for all the plates, whose availability is to be verified.

   NOTE: Clear the check box next to the misplaced plate, if you do not want to move it to the locations contents of which are being rectified.

7. Click **OK**. If the list of the expected plates contains some plates that are not verified, the plates are marked as missing and the following warning message box appears.
8. Click **OK** if you want to move the plates, which have not been verified, to the Missing location.

PRINT REPORT

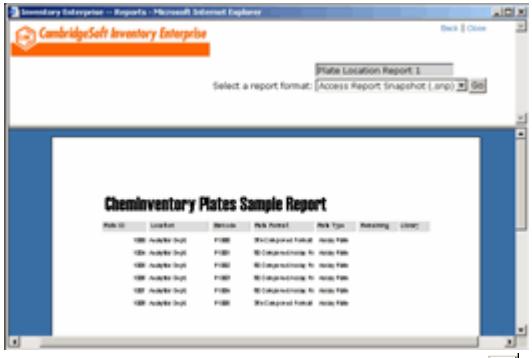
The Print Report link in the Plate List frame lets you generate a report that can provide summarized information about all the plates contained in the Plate List frame. The reports are driven by the report layouts, which specify the format for a report and the information that is to be included in the report. As the reports are driven by the report layouts, the reports may not provide the same information as provided by the Plate List frame. For example, the Plate List frame may display information about the plate concentration. However, the report generated for the Plate List frame may not provide this information.

NOTE: If the reports available in Inventory Enterprise 11.0 do not fulfill your requirements and you need additional reports, see your system administrator.

To generate reports using the Print Report link:

1. Click the **Print Report** link in the Plate List frame. The **Reports** window is displayed.

2. Select the appropriate report layout from the **Select a report layout** drop down list.
3. Click the **Go** button. The **Reports** window gets populated with the **Select a report format** drop down list.
4. Select the appropriate format for the report from the **Select a report format** drop down list.
5. Click the **Go** button. A warning message is displayed. The warning message informs you that the window, which will be displayed next possesses a security risk.
6. Click the **Yes** button to continue. The report for the selected location appears as:



You can print the reports by clicking the icon displayed in the lower frame of the Reports window.

Plate Details frame functions

The Plate Details frame functions are:

- Edit Plate
- Move Plate
- Dilute Plate
- Retire Plate
- Delete Plate
- Create Daughter Plates
- Copy Plate
- Create Plate Map
- Reformat Plates
- Update Plates
- Edit Well
- Lineage
- Print Label
- Manage Links

EDIT PLATE

To edit a plate:

1. Navigate through the Location Tree frame to reach to the location, which contains the plate to be edited.
2. Select the desired plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Edit Plate** from the Update menu in the Plate Details frame. The **Create or Edit an Inventory Plate** window appears as:

NOTE: For information about the plate fields contained in the Create or Edit an Inventory Plate window, see ""Inventory Enterprise 11.0 form fields" on page 114. To see if you have the appropriate privileges to edit a plate, see "Roles" on page 119 and "Privileges" on page 120.

- The **Create or Edit an Inventory Plate** window consists of two tabs, which are:
  - Required Plate Attributes: Lets you edit the attributes of the plate. It is necessary to

set the field marked in red on this tab window.

- Update Well Attributes: Lets you edit the attributes of the wells of the plate.

4. Make the required changes in the plate and well attributes and click **OK**.

NOTE: While editing a plate, you cannot modify the format of the plate. This is because changes in the plate format requires changes in the structure of the plate. However, the structure of a plate cannot be modified once it is created.

MOVE PLATE

To move a plate at a location other than its current location:

1. Navigate through the Location Tree frame to reach to the location, which contains the plate to be moved.
2. Select the desired plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Move Plate** from the **Update** menu in the Plate Details frame. The **Move an Inventory Plate** window appears as:

NOTE: To see if you have the appropriate privileges to move a plate, see "Roles" on page 119 and "Privileges" on page 120.

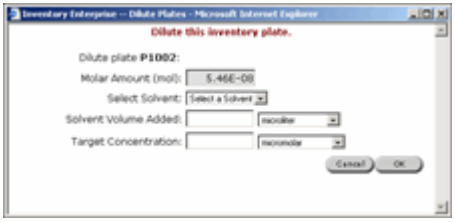
4. Specify the destination location where you want to move the plate, in the **Destination Location** text box. You may also use the **Browse** link to find the location.
5. Click **OK**. Observe that the plate is moved to the desired location.

NOTE: When you move a plate from a location that is below a location of type Freezer or Ultra-freezer, to a location that is not below a location of type Freezer or Ultra-freezer, the number of Freezing/Thawing (F/T) cycles of the plate increases by one, automatically. If plates are moved between locations that are within a Freezer or Ultra-freezer type location then the number of F/T cycles does not change.

DILUTE PLATE

To dilute a plate with a solvent:

1. Navigate through the Location Tree frame to reach to the location, which contains the plate to be diluted.
2. Select the desired plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Dilute Plate** from the **Update** menu in the Plate Details frame. The **Dilute Plates** window appears as:



NOTE: To see if you have the appropriate privileges to dilute a plate, see "Roles" on page 119 and "Privileges" on page 120.

4. Perform the following tasks in the **Dilute Plates** window:

- Select solvent with which the plate is to be diluted from the **Select Solvent** drop down list.
- Specify the volume of solvent in the **Solvent Volume Added** text box.
- Select the appropriate unit from the drop down list next to the **Solvent Volume Added** text box. Observe that the target concentration gets calculated automatically and is displayed in the **Target Concentration** text box.

5. Click **OK**.

RETIRE PLATE

The Retire Plate link lets you retire a plate, but reserve the contents of the plate. When you retire a plate, the plate is moved to the Disposed location and the status of the plate is set to Tested. Retiring is different than deleting because when a plate is retired its contents are preserved, but when it is deleted, its contents are lost permanently.

To see if you have the appropriate privileges to retire a plate, see “Roles” on page 119 and “Privileges” on page 120.

To retire a plate:

1. Navigate through the Location Tree frame to reach to the location, which contains the plate to be retired.
2. Select the desired plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Retire Plate** from the **Update** menu in the Plate Details frame. The **Retire an Inventory Plate** window appears as:

4. Observe that, by default, the **Destination Location** text box is set to **Disposed** and the **Plate Status** drop down list is set to **Tested**.

NOTE: Clear the check box, Set the quantity remaining to zero, if you do not want to set the remaining quantity to zero when the plate is moved to the Disposed location.

5. Click **OK**.

DELETE PLATE

Unlike Retire Plate, the Delete Plate link lets you delete a plate along with its contents permanently and move the plate to Trash Can. To see if you have the appropriate privileges to delete a plate, see “Roles” on page 119 and “Privileges” on page 120.

To delete a plate:

1. Navigate through the Location Tree frame to reach to the location, which contains the plate to be deleted.
2. Select the desired plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Delete Plate** from the **Update** menu in the Plate Details frame. The **Delete an Inventory Plate** window, asking you to confirm the deletion action, appears.
4. Ensure that the plate specified in the **Plate to delete** text box is the one that is to be deleted and click **OK**.

CREATE DAUGHTER PLATES

You can create daughter plates from a plate, only if the parent plate contains enough content. When creating daughter plates, reformatting plates, or creating plates from text file, you need to take care of two values:

- The quantity of the compound
- The volume/concentration of the solution.

If you are tracking the quantity of compound and solution volume/concentration then you should have values for qty_remaining and solvent_volume fields. solution_volume will be calculated from these values. However, concentration will have to be entered by the user. The system will calculate the Molar concentration by default, but that is stored in a separate field.

If you are tracking solution volume/concentration then you can simply enter the solution volume and qty_remaining will be null. You can still add solvent_volume to dilute the plate.

When daughtering/reformatting/creating plates from text file or any time you are creating a new plate from an existing plate, the system should automatically decrement the quantity values appropriately.

Examples:

- Dry compound, solvated

qty	solvent vol	solution vol	conc
10umol	10ul	10ul	1M

Daughter: Take 1 umol, qty values in the new plate should be:

qty	solvent vol	solution vol	conc
1umol	1ul	1ul	1M

Daughter: Take 1 ul, qty values in the new plate should be:

qty	solvent vol	solution vol	conc
1umol	1ul	1ul	1M

- Wet compound, solvated (rare for a wet compound)

qty	solvent vol	solution vol	conc
10ul	10ul	20ul	1M

Daughter: Take 1 ul, qty values in the new plate should be:

qty	solvent vol	solution vol	conc
.5 ul	.5ul	1ul	1M

- Solution tracking only

qty	solvent vol	solution vol	conc
null	null	10ul	1M

Daughter: Take 1 ul, qty values in the new plate should be:

qty	solvent vol	solution vol	conc
null	null	1ul	1M

Daughter (with wrong units): Take 1 ug, qty values in the new plate should be:

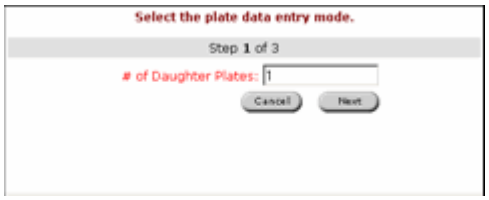
qty	solvent vol	solution vol	conc
null	null	0ul	1M

To see if you have the appropriate privileges to create daughter plates, see “Roles” on page 119 and “Privileges” on page 120.

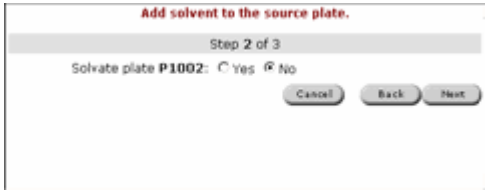
To create daughter plates:

1. Navigate through the Location Tree frame to reach to the location that contains the plate to be daughtered.

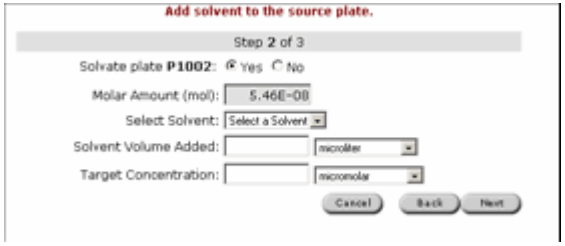
2. Click the appropriate plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Create Daughter Plates** from the **Create** menu in the Plate Details frame. The following window appears as:



4. Specify the number of daughter plates that are to be created in the **# of Daughter Plates** text box.
5. Click **Next**. The following window appears as:



- In the preceding window, select the **Yes** radio button if you want to add a solvent to the parent plate. When you select the **Yes** radio button, the preceding window gets populated with some additional fields, as shown in this figure:



- You need to perform the following tasks to set these fields:
  - Specify the volume of solvent in the **Solvent Volume Added** text box.
  - Select the appropriate unit for the solvent from the drop down list next to the **Solvent Volume Added** text box. Observe that the target concentration gets calculated automatically and is displayed in the **Target Concentration** text box.
6. Click **Next**. The following window appears as:

7. Perform the following tasks to set the fields contained in the preceding window:

- Specify barcodes for the daughter plates by performing one of the following tasks:
  - Type the barcode of the daughter plates in the respective **Plate Barcode** text boxes.
  - Select the **Auto-generate barcode from barcode description** radio button. This displays the **Barcode Description** drop down list. Select the appropriate option from the **Barcode Description** drop down list.
  - Select the **Auto-generate barcode from custom sequence** radio button. This displays the **Prefix** and **Sequence Start** text boxes. Type appropriate values in both the text boxes.
- Specify the ID of the location where the daughter plates are to be kept in the **Location ID** text box.

- Select the type of the daughter plates from the **Select Plate Type** drop down list.
- Specify the amount that is to be taken from the parent plate in the **Source Amount Plate** text box.
- Specify the type of the solvent for the target plates in the **Select Solvent** drop down list.
- Specify the volume of the solvent in the **Solvent Volume** text box.
- Select the appropriate unit for the solvent from the drop down list next to the **Solvent Volume** drop down list.

NOTE: Select the Dry source plates after reformat check box if you want to dry the source plate and set the volume of solvent and solution to zero, after the daughter plates are created.

NOTE: While creating daughter plates, make sure that the units specified for parent and target plates are in sink with each other. For example, if the unit for the parent plate is microliter and the unit for the target plate is cubic feet, then no amount of the parent plate content are added to the target plates.

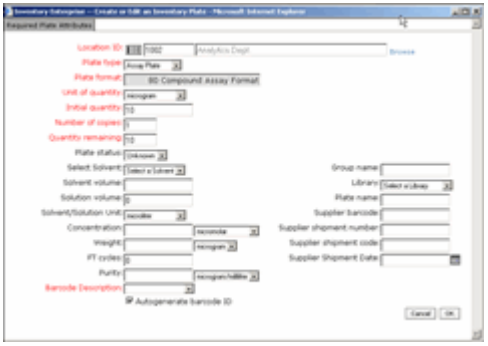
8. Click **OK**. Observe that the daughter plates are created at the specified location.

COPY PLATE

The Copy Plate link lets you create a plate that is identical to an existing plate. To see if you have the appropriate privileges to copy a plate, see “Roles” on page 119 and “Privileges” on page 120.

To create copy of a plate:

1. Navigate through the Location Tree frame to reach to the location, which contains the plate to be copied.
2. Select the desired plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Copy Plate** from the **Update** menu in the Plate Details frame. The **Create or Edit an Inventory Plate** window, containing the information of the original plate, appears as:



4. Edit the information, if required, and click **OK**. The newly created identical plate is displayed at the chosen location.

CREATE PLATE MAP

A plate map is a virtual representation of a plate. It stores all the information about the plate, such as plate type and format, and then lets you create a new plate with similar attributes. You can store the plate maps only at the special locations termed as the Plate Map locations. Therefore, before creating a plate map, you need to create a Plate Map location, if a Plate Map location does not exit already. For information about creating Plate Map location, see “Creating plate map location” on page 73.

To see if you have the appropriate privileges to create plate maps, see “Roles” on page 119 and “Privileges” on page 120.

To create a plate map:

1. Navigate through the Location Tree frame to reach to the location that contains the desired plate.
2. Click the appropriate plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Select **Create Plate Map** from the Create menu in the Plate Details frame. The **Create a Plate Map** window appears as:

4. Specify the Plate Map location at which you want to store the plate map in the **Plate Map Location** text box.

NOTE: If you attempt to specify a location that is not of the Plate Map type in the Plate Map Location text box, a warning message stating, "This is not a valid plate map location" appears.

5. Click **OK**.

After creating the plate maps, you can create any number of plates from the plate map. The plate properties of all the plates created from the plate map will be similar to the plate associated with the plate map. For information about creating plates from a plate map, see "Creating plate using plate map" on page 73.

CREATING PLATE MAP LOCATION

Plate Map locations are the special locations that are used to store plate maps. To create a Plate Map location:

1. Navigate through the Location Tree frame to reach to the location, under which you want to create the Plate Map location.
2. Select **New** from the **Location** menu in the Location Tree frame. The **Create a New Location** window appears.
3. Enter a name for the location in the **Location Name** text box.
4. Select **Plate Map** from the **Location Type** drop down list.
5. Click **OK**.

CREATING PLATE USING PLATE MAP

To create a plate from a plate map:

1. Navigate through the Location Tree frame to reach to the Plate Map location, which contains the desired plate map.
2. Select the desired plate map in the Plate List frame. The details of the plate map are displayed in the Plate Details frame.
3. Select **Create Plate** from the **Create** menu in the Plate Details frame. The **Create or Edit an Inventory Plate** window appears.
4. Observe that the **Create or Edit an Inventory Plate** window is automatically populated with the plate information.
5. Specify the initial quantity in the **Initial quantity** text box.
6. Specify the remaining quantity in the **Quantity remaining** text box
7. Select a barcode description in the **Barcode Description** drop down list.
8. Edit other plate information, if required, and click **OK**. Observe that the new plate is created at the desired location.

UPDATE PLATES

The Update Plates link lets you update multiple plates, at once. The Update Plates link is visible in the Plate Details frame only when the Plate List frame is in the multi select mode. To view the Plate List frame in the multi select

mode, you need to click the Multi-Select link from the View menu in the Plate List frame.

To update multiple plates using the Update Plates link:

1. Navigate through the Location Tree frame to reach to the location, which contains the plates to be updated.
2. Select **Multi-Select** from the **View** menu in the Plate List frame.
3. Select the check box next to the desired plate(s).
4. Select **Update Plates** from the **Update** menu in the Plate Details frame. The **Update Inventory Plates** window appears as:

5. Select the plate field that is to be updated in the **Plate Fields** list box.

NOTE: You can also select multiple fields in the Plate Fields list box. To select multiple fields, you need to hold down the CTRL key.

6. Click **OK**. The following window, asking you to enter values for the fields selected in the **Plate Fields** list box, appears as:

7. Enter the appropriate values in the respective fields and click **OK**. In the Plate Details frame, observe that the selected plate has been updated with the new information.

REFORMAT PLATES

The Reformat Plates link lets you create a plate that contains compounds of multiple plates. Reformatting plates is similar to daughtering plates except that unlike daughtered plates, reformatted plates can have multiple parents.

You can reformat either one, four, or five plates to create a new plate. Reformatting one plate is exactly similar to creating a daughter plate. This is because, like a daughtered plate, the plate that is created after reformatting a plate also has single parent. The plates are reformatted into a new plate with the help of the reformat map, which specifies the format of the plate created after reformatting. Various default reformat maps that can be used to reformat the plates are:

- Daughter: Lets you reformat one plate.
- 4 96 Well To 1 384 Well Map: Lets you reformat four plates.
- Mix Plate Map: Lets you reformat five plates.

Apart from of using default reformat map, you can also create your own reformat map for reformatting plates. However, you can use the custom reformat maps for reformatting only four plates. You can create two types of reformat maps for reformatting plates, which are:

- Stamped reformat map
- Dithered reformat map

NOTE: The Reformat Plates link is visible in the Plate Details frame only when the Plate List frame is in the multi select mode. To view the Plate List frame in multi select mode, you need to click the Multi-Select link in the Plate List frame.

To reformat plates:

1. Navigate through the Location Tree frame to reach to the location, which contains the plates to be reformatted.
2. Select **Multi-Select** from the **View** menu in the Plate List frame.
3. Select the check box next to the desired plate(s).

NOTE: While reformatting plates, ensure that the plates are not empty. In addition, if you are reformatting four or five plates, ensure that all the plates are of similar type and format.

4. Select **Reformat Plates** from the **Create** menu in the Plate Details frame. The **Reformat Inventory Plates** window appears as:

5. Select the appropriate reformat map from the **Select a Reformat Map** drop down list.

NOTE: The names of the reformat maps displayed in the Select a Reformat Map drop down list vary with the number of plates selected in the multi select view of the Plate List frame.

6. Click **Next**. The following window appears as:

7. Select the order in which the compounds of the source plates should be distributed to the different wells of the reformatted plate.

NOTE: You are not asked to select the order for the source plates if you are reformatting only one plate.

8. Click **Next**. The following window appears as:

9. Select the **Yes** radio button corresponding to a source plate, if you want to add a solvent to the plate. Thereafter, provide the required information in the fields that are displayed when the **Yes** radio button is selected.
10. Click **Next**. The following window appears as:

11. Provide the appropriate information in the respective fields and click **OK**.

CREATING STAMPED REFORMAT MAP

When you reformat a plate using the Stamped Reformat map, the plate is divided into four equal parts and each part of the plate contains compound of single parent plate. For example, if you reformat P1, P2, P3, and P4 plates using the stamped reformat map, first part of the plate will contain compound of P1, second part will contain compound of P2, third part will

contain compound of P3, and fourth part will contain compound of P4.

To create a stamped reformat map:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.
2. Click the **Plate Settings** link in the **Plate Management** section.
3. Click the **New** link next to the **Reformatting Maps** drop down list. The **Manage Reformat Maps** window appears.
4. Perform the following tasks in the **Manage Reformat Maps** window:

- Select **Stamped** from the **Reformat Map Type** drop down list. The following view of the **Manage Reformat Maps** window appears as:

- Specify the name of the reformat map in the **Reformat Map Name** text box.
- Select format of the source plate from the **Source Plate Format** drop down list.

5. Click **OK**. A screen, informing you about the successful creation of the reformat map, is displayed.
6. Click **OK**.

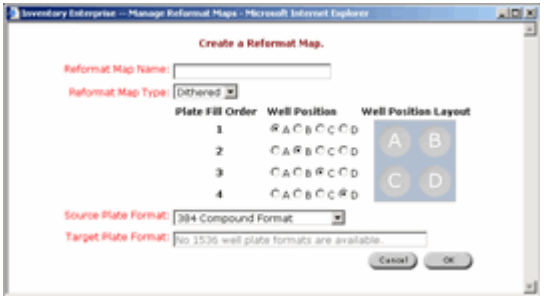
CREATING DITHERED REFORMAT MAP

In case of the dithered reformat map, if P1, P2, P3, and P4 plates are reformatted, the well a1 of the new plate will contain compound of P1, well a2 will contain compound of P2, well b1 will contain compound of P3, and well b2 will contain compound of P4.

NOTE: The order in which the compounds of the different parent plate are distributed to the different wells of the reformatted plate can vary. You can specify the required plate fill order while creating the reformat map.

To create a dithered reformat map:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.
2. Click the **Plate Settings** link in the **Plate Management** section.
3. Click the **New** link next to the **Reformatting Maps** drop down list. The **Manage Reformat Maps** window appears as:



4. Perform the following tasks in the **Manage Reformat Maps** window:

- Specify the name of the reformat map in the **Reformat Map Name** text box.
- Ensure that **Dithered** is selected in the **Reformat Map Type** drop down list and set the plate fill order.
- Select format of the source plate from the **Source Plate Format** drop down list.

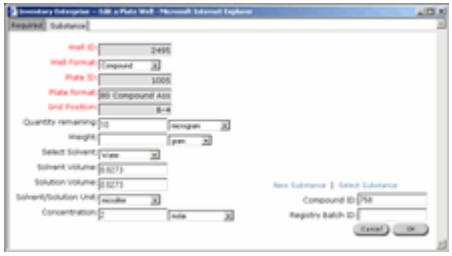
5. Click **OK**. A screen, informing you about the successful creation of the reformat map, is displayed.
6. Click **OK**.

EDIT WELL

The Edit Well link lets you edit attributes of an individual well of a plate. Unlike the Edit Plate link, the well attributes modified using the Edit Well link are not applied to all the wells in the plate.

To edit a well using the Edit Well link:

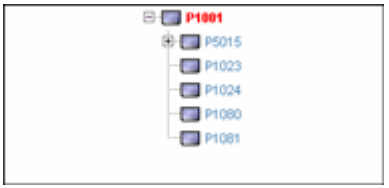
1. Navigate through the Location Tree frame to reach to the location, which contains the desired plate.
2. Select the desired plate in the Plate List frame. The details of the plate are displayed in the Plate Details frame.
3. Click the **Plate Viewer** tab in the Plate Details frame. The plate is displayed in the grid format.
4. Click a cell of the grid to edit the well represented by it. The **View a Plate Well** window, containing the **Edit Well** link, appears. The **Edit Well** link is at the top right corner.
5. Click the **Edit Well** link. The **Edit a Plate Well** window appears as:



6. Make the required changes on the appropriate tab and click **OK**.

LINEAGE

The Lineage link lets you determine the complete hierarchy of a plate. When you select a plate in the Plate List frame and click the Lineage link from the Other menu in the Plate Details frame, a tree structure appears as:



The tree structure contains the parent and child plates of the selected plate, if any. It also contains all other plates having same parent plate as the selected plate. In addition, the tree structure lets you determine if the parent plate of the selected plate further has any parent or the child plates of the selected plate further have any children.

PRINT LABEL

The Print Label link lets you generate barcode for a plate. A barcode is a special type of report that can provide information about any attribute associated with a plate.

To generate barcode for a plate:

1. Navigate through the Location Tree frame to reach to the location that contains the plate for which you want to generate the barcode.
2. Click the appropriate plate in the Plate List frame. The details of the container are displayed in the Plate Details frame.
3. Select **Print Label** from the **Other** menu in the Plate Details frame. The **Print Plate Labels** window appears as:

4. Select the appropriate layout for the report from the **Label Type** drop down list.

NOTE: The report layouts specify the format for a report and the information that is to be included in the report.

5. Click the **Go** button. A warning message is displayed. The warning message informs you that the window, which will be displayed next possesses a security risk.
6. Click the **Yes** button to continue. The barcode for the selected plate is displayed in the lower frame of the **Print Plate Labels** window:

You can print the plate barcode by clicking the icon displayed in the lower frame of the Print Plate Labels window.

MANAGE LINKS

To manage links:

1. Select **Manage Links** from the **Other** menu in the Plate Details frame. The Manage Links window appears

2. Click the **New** link. The **Create/Edit/Delete an Inventory Link** window appears.
3. Provide the URL and the link text for the link to be created.
4. Click **OK**. The new link appears as:

NOTE: The links are added to a table as shown in the preceding figure. You can edit and delete the existing links using the Edit and Delete links corresponding to the relevant row in the table.

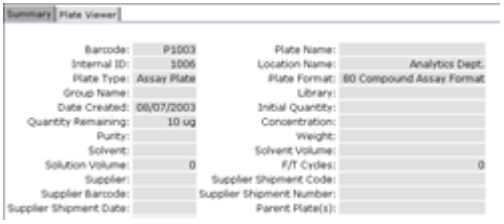
Plate Details frame tabs

The Plate Details frame tabs are:

- Summary tab
- Plate Viewer tab

SUMMARY TAB

The Summary tab provides information about all the attributes of the plate. The following figures displays the Summary tab window:

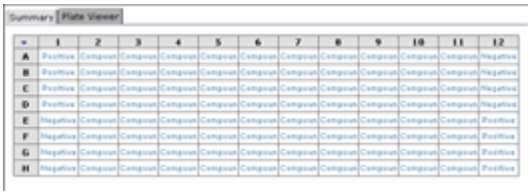


For information about the plate fields displayed in the Summary tab window, see “Inventory Enterprise 11.0 form fields” on page 114.

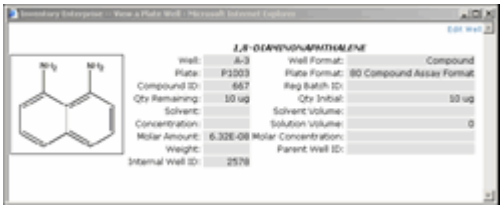
PLATE VIEWER TAB

The Plate Viewer tab displays the plate in the grid format. Each cell of the grid represents a

well. The following figure displays the Plate Viewer tab window:



You can click a cell of the grid to gather information about the well represented by it. When you click a cell, the View a Plate Well window appears as:



The View Plate Well window contains the Edit Well link that lets you edit contents of an individual well. For more information about editing contents of an individual well, see “Edit well” on page 77.

Reports management

The Reports sub-module of the Inventory Enterprise 11.0 application enables you to create reports, which can be used to gather information about the locations, containers, and substances in Inventory Enterprise 11.0. The data required for creating reports is stored in the ReportQueue.mdb and ChemInv_reports.mdb tables. Inventory Enterprise 11.0 uses the ReportsQ.dll and Reports.exe files to manage reports.

NOTE: You should create the schemas, CHEMINVDB2 and REGDB in the same Oracle database otherwise the default queries for Inventory reports will not work and you will have to reconfigure those queries.

In Inventory Enterprise 11.0, there are two types of reports, which are:

- Standard reports: Refers to the reports that are already available in Inventory Enterprise 11.0.
- Custom reports: Refers to the reports that are not already available in Inventory Enterprise 11.0 and are created by the users, as per their requirements.

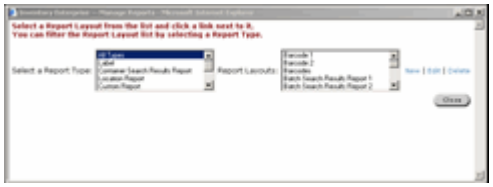
Both types of reports are driven by the report layouts, which specifies the format for a report and the information that is to be included in the report.

Creating report layout

You can create a new report layout if the report layouts available already in Inventory Enterprise 11.0 do not fulfill your requirement. To create a report layout:

1. Click **Tasks** within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.

2. Click the **Manage Reports** link in the **Inventory Management** section. The **Manage Reports** window appears as:



3. Click the **New** link. The **Add Report** window appears as:

4. Perform the following tasks in the preceding windows:

- Select the appropriate report type from the **Select a report type** drop down list.

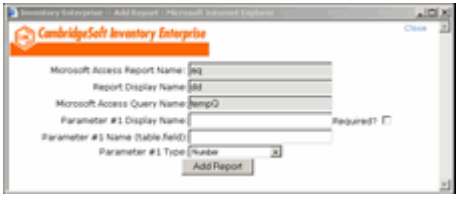
NOTE: If you select Custom Report as the report type then you will be able to select the resultant report layout of this procedure when creating a custom report.

- Type the name of the MS Access report with which the layout is to be associated in the **Enter Microsoft Access Report Name** text box.

NOTE: The MS Access reports for Inventory Enterprise 11.0 are found in a database called Cheminv_reports.mdb. You can also create a new report in Cheminv_reports.mdb if already existing reports do not meet your requirement.

- Type the name of the layout in the **Enter Report Display Name** text box.
- Type the name of the Microsoft Access Query for the report, in the **Enter Microsoft Access Query Name** text box.
- Enter the SQL query for the report to be created.
- Specify the number of parameters to be added in the **Enter # of Parameters to Configure** text box.

5. Click the **Go** button. The following window appears as:



6. Specify the display name of the parameter to be added.
7. Select the **Required** check box, if the parameter to be added is a required field.
8. Specify the table field to which the parameter is related.

NOTE: You will have to enter value for the parameter when creating a report using this report layout.

9. Click the **Add Report** button. A success message is displayed.
10. Click **OK**. The newly created report layout is displayed in the **Report Layouts** list box, in the **Manage Reports** window.

Editing report layout

To edit a report layout:

1. Click **Tasks** within the **Inventory Enterprise** section in the home page of ChemBioOffice

Enterprise to display the **Administrative Menu** window.

2. Click the **Manage Reports** link in the **Inventory Management** section to display the **Manage Reports** window.
3. Select the appropriate report type in the **Select a Report Type** drop down list. The report layouts that comes under the selected report type are displayed in the **Reports Layouts** drop down list.
4. Select the report layout that is to be edited in the **Reports Layouts** drop down list and click the **Edit** link. The **Edit Report Details** window appears.
5. Modify the required information and click the **Go** button.
6. Click **OK** when the success message is displayed.

Deleting report layout

To delete a report layout:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise to display the **Administrative Menu** window.
2. Click the **Manage Reports** link in the **Inventory Management** section to display the **Manage Reports** window.
3. Select the appropriate report type in the **Select a Report Type** drop down list. The report layouts that come under the selected report type are displayed in the **Reports Layouts** drop down list.
4. Select the report layout that is to be deleted in the **Reports Layouts** drop down list and click the **Delete** link.
5. Click the **Go** button to delete the report.
6. Click **OK** when the success message is displayed.

Generating a standard report

Inventory Enterprise 11.0 contains various standard reports, each of which is generated in a different manner. The various types of standard reports available in Inventory Enterprise 11.0 are:

- Label report
- Container search result report
- Location report
- Custom report
- Plate location report
- Plate search result report
- Plate label report
- Batch label report

After generating a standard report, you can print the report by clicking the  icon displayed in the window containing the report.

Label report

Label reports allow you to generate barcode for a container. Container barcode is a special type of report that lets you gather information about all the attributes of the container. You can generate barcode for a container by navigating to the desired container in the Container List frame and clicking the Print Label link in the Container Details frame.

For more information about generating a label report for a container using the Print Label link, see “Print label” on page 77.

Container Search Result report

Container search result report is generated for the results of the Simple search and Advanced search. It is generated using the Print Report link displayed in the Container List frame that contains the results of the Simple and Advanced searches.

Location report

Location reports can be used either to gather information about all the containers stored in a location or to generate barcodes for all the containers. The report layout that you specify while generating a Location report specifies whether to generate a report that provides summarized information about all the containers stored in the selected location or to generate barcodes for the containers. You can generate a location report by navigating to the required location in the Location Tree frame and clicking the Print Report link in the Container List frame.

For more information about generating a location report for containers, see “Print report” on page 35.

Custom report

Custom report is generated for user defined report templates.

Plate Location report

Plate location report provides summarized information about all the plates stored in a location. To generate a plate location report, navigate through the Location Tree frame to reach to the location for which you want to generate the plate location report and click the Print Report link in the Plate List frame.

NOTE: You can generate a plate location report for a location only if the location contains plates and also displays plates. For more information about generating a plate location report using the Print Report link, see “Print report” on page 35.

Plate Search Result report

Plate search result report is generated for the results of Plate search. Like Container Search Result report, it is also generated using the Print Report link displayed in the window that contains the results of the plate search.

Plate Label report

Plate label report lets you generate barcode for a plate. Plate barcode is a special type of report that lets you gather information about any plate attribute. You can generate barcode for a plate by navigating to the desired plate in the Plate List frame and clicking the Print Label link in the Plate Details frame.

For more information about generating a plate label report using the Print Label link, see “Print label” on page 77.

Batch Label report

Batch label report is generated for the results of the Batch search.

Generating a custom report

To generate a custom report:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise to display the **Administrative Menu** window.
2. Click the **Custom Reports** link in the **Inventory Management** section. The **Reports** window appears as:

3. Select a report layout from the **Select a report layout** drop down list and click the

Go button. The following window appears as:

NOTE: In the preceding image, the parameters start date and end date are displayed because they had been added to the report layout, custo1.

4. Select a report format from the **Select a report format** drop down list.
5. Specify start and end dates, and click the **Go** button. The report is displayed in the lower frame of the **Reports** window.

You can print the report by clicking the icon in the lower frame of the Reports window.

Administration

Only the users having sufficient privileges can perform administration tasks in Inventory Enterprise 11.0. See your system administrator if you want to have privileges to perform an administration task.

Managing users and roles

The links for managing users and roles for a ChemBioOffice Enterprise application are available within the interface of the application as well as on the home page of ChemBioOffice Enterprise. You can manage users and roles for the ChemBioOffice Enterprise applications only if you have sufficient privileges.

Loading compounds

Inventory Loader is an application that lets you import compounds from XLS files, CSV files, and ChemBioFinder database and load them into the Inventory Enterprise 11.0 or Registration Enterprise applications.

Inventory Loader can run only on that computer, which can access the ChemBioOffice Enterprise application server.

Most often, the compounds that are to be loaded into the Inventory Enterprise 11.0 or Registration Enterprise applications are stored in a SDFile. In such situation, you can load the compounds by converting the SDFile into a ChemBioFinder database. You can convert the SDFile into a ChemBioFinder database using the ChemBioFinder application.

The Inventory Loader application can import compounds in three ways, which are:

- Into a series of new plates
- Into containers
- Directly into Inventory Enterprise 11.0

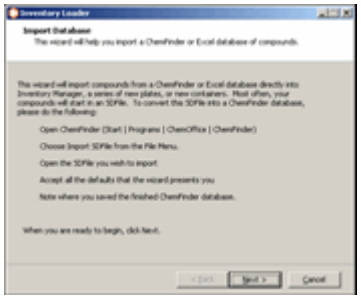
When importing compounds, you need to select the appropriate fields from the source database. However, Inventory Loader eliminates the need to select the fields repeatedly by allowing you to save the information as mapping templates and reuse them later.

Loading compounds into plates

When you use Inventory Loader to load compounds into plates, new plates are created in Inventory Enterprise 11.0 and they are then loaded with the compounds imported from the selected database file.

To load compounds into plates using Inventory Loader:

1. Start the Inventory Loader application. The **Import Database** screen of the Inventory Loader wizard, appears as:

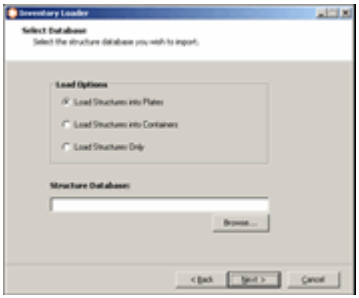


2. Click **Next**. The **Login to the Inventory Web Server** screen appears as:

3. Enter the name of the ChemBioOffice server and your user name and password in the **Server**, **User ID**, and **Password** text boxes, respectively.

NOTE: Ensure that the user name that you have entered in the preceding window has sufficient permissions to create plates and load compounds in it. Also, ensure that the user name has sufficient permissions to access Registration Enterprise, if you want to register the compounds into the Registration Enterprise database.

4. Click **Next**. The **Select Database** screen appears as:



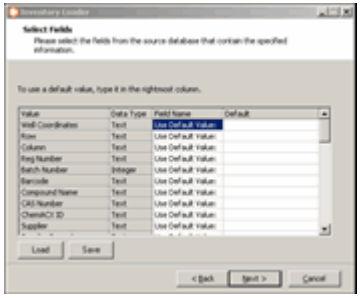
NOTE: If an error message appears, stating that no plate locations or formats are configured in Inventory Enterprise 11.0, then you need to create a location that can hold plates and/or create a valid plate format, in Inventory Enterprise 11.0.

5. Browse and locate the database file from which the compounds are to be imported. The file can be a CSV file, XLS file, or a ChemBioFinder database.

NOTE: Choosing a format other than ChemBioFinder database will not have any impact on the behavior of the application; field mappings and registration options will work in exactly the same manner for all three formats.

However, in case of importing data from a XLS file with multiple worksheets, you will have to select the actual worksheet name that contains the data you wish to import.

6. Ensure that the **Load Structures into Plates** radio button is selected and click **Next**. The **Select Fields** screen appears as:



NOTE: If an error message appears, stating that the database cannot be opened then you need to upgrade the database to the current version of ChemBioFinder. To upgrade the database, open the database using the ChemBioFinder and follow the prompts.

NOTE: If the ChemBioFinder database contains more than one table, you are provided with a drop-down list of the table names. You need to select the table with which you want to map the fields from the drop-down list. Typically, the name of the table with which the fields are mapped is MolTable.

In the Select Fields screen:

- The Data Type column facilitates data validation by providing you prior information about the type of data to be entered.
- The Value column displays the plate fields.
- The Field Name column lets you set the value of the fields. You can set a field either by mapping it with a column of a table of the ChemBioFinder database or by specifying a value for it in the Default column.

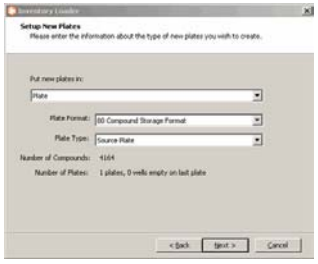
While setting the plate fields, consider the following aspects:

- It is not necessary to set Row and Column fields as well as the Well Coordinate field. However, if you set the Row field, it is necessary to set the Column field.
- If some columns of the table with which you are mapping the fields contain plate identifiers, then map those columns with the Barcode and Supplier Barcode fields. Map the column that contains numeric plate identifiers with the Supplier Plate Number field.
- It is necessary to set one of the Supplier Barcode, Supplier Plate Number, or Barcode fields and one of the Well Coordinate or Row and Column fields, otherwise, the compounds may not load into the plates correctly.

7. Set the fields in the **Select Fields** screen, as required. In case you have saved the mapping information earlier as a mapping template, you can select the fields by clicking the Load button and selecting the saved mapping template.

NOTE: After selecting the fields, you can save the information by clicking the Save button. Later on, you can reuse the saved information by clicking the Load button.

8. Click **Next**. The **Setup New Plates** screen appears as:



This window provides information about the total number of the compounds that will be imported and the total number of plates that will be created in Inventory Enterprise 11.0 after the completion of the import process. This information lets you determine, in advance, whether or not the import process will provide expected results.

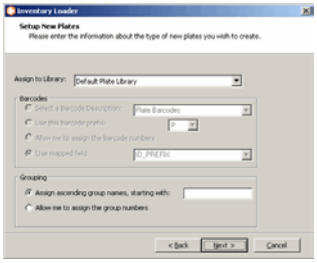
9. Perform the following tasks in the **Setup New Plates** screen:

- Select the location at which you want to store the new plates from the **Put new plates in** drop down list.
- Select the format for the plates from the **Plate Format** drop down list.

NOTE: The plate format describes the size and layout of a plate. The layout of the plate specifies where to store the compounds in the plate and which wells are to be kept empty.

- Select plate type from the **Plate Type** drop down list.

10. Click **Next**. Another page of the **Setup New Plates** screen appears as:



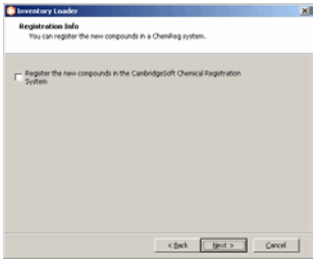
11. Perform the following tasks in the preceding screen:

- Select the library to which the plates are to be assigned from the Assign to Library drop down list.
- Assign barcodes to the plates, as required, in the Barcodes section.

NOTE: The Barcodes section appears in the non-editable mode if the Barcode field is already set in the Select Fields window.

- Assign group numbers to the plates, if required, in the **Grouping** section.

12. Click **Next**. The **Registration Info** screen appears as:



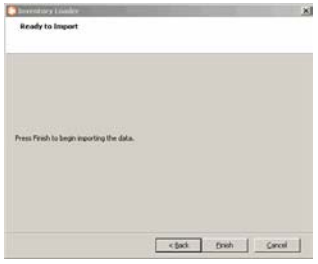
13. Select the **Register the new compounds in the CambridgeSoft Chemical Registration System** check box if you want to register the compounds into the Registration Enterprise database. When you select this check box, Inventory Loader verifies whether or not you have sufficient permissions to register compounds into Registration Enterprise. A grid containing the Registration Enterprise fields is displayed in the **Registration Info** screen, if Inventory Loader finds your authentication information valid. Otherwise, an error message is displayed.
14. Set the values of the Registration Enterprise fields in the **Value** column.
15. Click the **Registration Options** button if you want to set other Registration Enterprise fields also, in addition to the fields dis-

played in the grid. The **Registration Options** dialog box appears.

NOTE: In the Registration Options dialog box, the fields are named as they are in the database, not as they are in the Registration Enterprise interface.

16. Set the Registration Enterprise fields in the similar manner, as the plate fields were set in the **Select Fields** window.
17. Click **OK**.
18. Click **Next**. The **Log Plate XML** screen appears as:

19. Select the **Log data to the following location** check box if you want to log the plate for the future reference.
20. Click **Next**. The **Ready to Import** screen appears as:



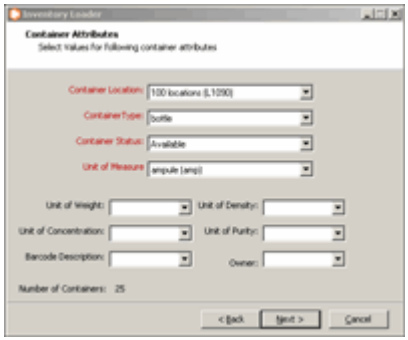
21. Click **Finish** to begin importing the compounds. A window, displaying the progress of the import process, appears.
22. Click **Finish** when the import process finishes. Observe that the plates are created at the specified location.

Loading compounds into containers

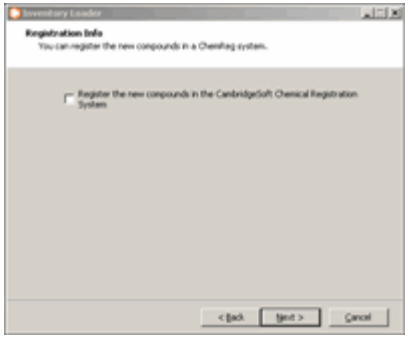
To load compounds into containers:

1. Start the Inventory Loader application. The **Import Database** screen of the Inventory Loader wizard, appears.
2. Click **Next**. The **Login to the Inventory Web Server** screen appears.
3. Enter the name of the ChemBioOffice server and your user name and password in the **Server**, **User ID**, and **Password** text boxes, respectively.
4. Click **Next**. The **Select Database** screen appears.
   a. Click the radio button, **Load Structures into Containers**.
   b. Click the **Browse** button locate the database file from which the compounds are to be imported. The file can be a CSV file, XLS file, or a ChemBioFinder database.
5. Click **Next**. The **Select Fields** screen appears.
6. Set the fields in the **Select Fields** screen, as required. In case you have saved the mapping information earlier as a mapping template, you can select the fields by clicking the **Load** button and selecting the saved mapping template.

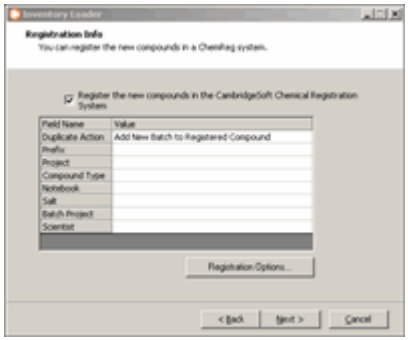
7. Click **Next**. The **Container Attributes** screen appears as:



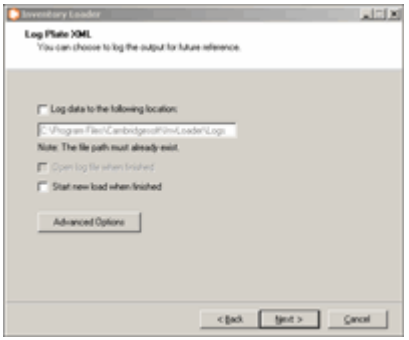
8. Specify values for the container attributes and click **Next**. The **Registration Info** screen appears as:



9. Click the only check box in the **Registration Info** screen. The following screen appears as:



10. Select values for the fields displayed and click **Next**. The **Log Plate XML** screen appears as:



11. Choose to log the output for future reference, if you wish to.
12. Click **Next**. The **Ready to Import** screen appears.
13. Click **Finish**. The import process starts.
14. Click **Finish** again when the import process is complete.

Loading compounds directly

To import the compounds directly into the Inventory Enterprise 11.0 and Registration Enterprise databases:

1. Start the Inventory Loader application. The **Import Database** screen of the Inventory Loader wizard, appears.
2. Click **Next**. The **Login to the Inventory Web Server** screen appears.
3. Enter the name of the ChemBioOffice server and your user name and password in the **Server**, **User ID**, and **Password** text boxes, respectively.
4. Click **Next**. The **Select Database** screen appears.
5. Click the **Load Structures Only** radio button.

6. Click the **Browse** button to locate a database and click **Next**. The **Select Fields** screen appears.
7. Set the fields displayed in the **Value** column. You can set a field either by mapping it with a field of ChemBioFinder database table in the **Field Name** column or by specifying a default value for the field in the **Default** column.
8. Click **Next**. The **Log Plate XML** screen appears.
9. Select the **Log data to the following location** check box if you want to log the output for future reference.
10. Specify the location at which you want to log the data in the text box displayed below the **Log data to the following location** check box.
11. Click **Next**. The **Ready to Import** screen appears.
12. Click **Finish** when the import process is completed.

Inventory tasks

The Inventory related administration tasks are performed in the Administrative Menu window. You can access the Administrative Menu window either by clicking the Tasks link in the Current Location frame or by clicking the Tasks link within the Inventory Enterprise section, in the home page of ChemBioOffice Enterprise. The following figure displays the Administrative Menu window:

The Administrative Menu window contains various links, which are:

- Search Inventory
- Manage Tables
- Manage Batching Fields
- Manage Reports
- Analyze Audit Trail
- Custom Reports
- Manage Approvals
- Manage Requests
- Manage Sample Requests
- Manage Orders
- Manage Container Receiving
- Change Password
- Manage Users
- Manage Roles
- Manage Role Locations
- Plate Settings
- Create Plates from Excel
- Create Plates from Text File
- Help

- Close

Apart from the above links, the Administrative Menu window provides links for managing grids and organizations.

NOTE: To see if you have the privileges to perform an administrative task, see "Roles" on page 119 and "Privileges" on page 120.

Search Inventory

The Search Inventory link in the Administrative Menu window lets you search substances, containers, and plates in Inventory Enterprise 11.0. The following figure displays the search form that appears on clicking the Search Inventory link:

NOTE: The number of tabs displayed in the preceding figure depends on the configuration settings.

Using the preceding search form, you can perform various type of searches, which are:

- Simple search
- Advanced search
- Substructure search
- Batch Search
- Global search
- Plate search

Manage Tables

The Manage Tables link in the Administrative Menu window lets you add, edit, and delete rows from the Inventory Enterprise 11.0 tables. This lets you add, edit, and delete the picklists values that are stored in tables.

Picklists are the drop down lists that provide you with a list of all the values possible for a field. For example, when you are creating a container, you are provided with the Container Type drop down list. This drop down list contains all the possible types of containers that can be created in Inventory Enterprise 11.0.

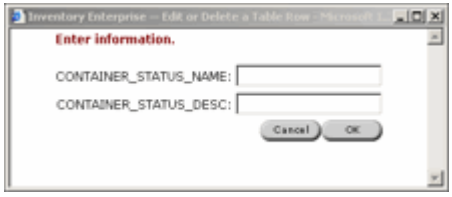
ADDING A NEW ROW

To add a new row to an Inventory Enterprise 11.0 table:

1. Click the **Manage Tables** link. The **Manage Tables** window appears as:

2. Select the required table from the **Select table** drop down list. The selected table, in the **Manage Tables** window, appears as:

3. Click the **New Row** link. The **Edit or Delete a Table Row** window appears as:



4. Enter the required information and click **OK**. The row is added to the table.

EDITING A ROW

To edit a row of an Inventory Enterprise 11.0 table:

1. Click the **Manage Tables** link. The **Manage Tables** window appears.
2. Select the required table from the **Select Table** drop down list. The selected table appears in the **Manage Tables** window.
3. Click the **Edit** link next to the row that is to be edited. The **Edit or Delete a Table Row** window appears.
4. Make the required changes and click **OK**.

DELETING A ROW

To delete a row of an Inventory Enterprise 11.0 table:

1. Click the **Manage Tables** link. The **Manage Tables** window appears.
2. Select the required table from the **Select Table** drop down list. The selected table appears in the **Manage Tables** window.
3. Click the **Delete** link next to the row that is to be deleted. The **Edit or Delete a Table Row** window, asking you to confirm the deletion action, appears.
4. Click **OK**.

Manage Batching Fields

Batching fields allow you to relate containers based on arbitrary fields, including the custom fields. The fields, based on which containers are related, are called batching fields and a group of related containers is called a batch. All the containers in a particular batch have the same batch id. For more information about managing batching fields, see "Managing batching fields" on page 53.

Manage Reports

The Manage Reports link in the Administrative Menu window lets you create, edit, and delete the report layouts. Report layouts specify the format for a report and the information that is to be included in the report.

The following figure displays the Manage Reports window:

For information about creating, editing, and deleting report templates, see "Creating report layout" on page 79, "Editing report layout" on page 80, and "Deleting report layout" on page 81.

Analyze Audit Trail

The Analyze Audit Trail link in the Administrative Menu window lets you keep track of the actions performed on the containers, locations, and compounds in Inventory Enterprise 11.0. For example, if the Qty Remaining field of a container is modified, you can audit Inventory Enterprise 11.0 to determine the old and new value of the field, date and time at which the field is edited, and the user who has edited the field.

You can audit Inventory Enterprise 11.0 using two different types of audit reports, which are:

- Standard
- Aggregate

NOTE: In addition to auditing Inventory Enterprise 11.0, you can also audit DocManager Enterprise using the auditing feature. However, you can audit DocManager Enterprise only if it is installed and configured properly on the system from which you are accessing Inventory Enterprise 11.0.

STANDARD AUDIT REPORT

Standard audit report lets you gather detailed information about all the actions performed in Inventory Enterprise 11.0. To audit Inventory Enterprise 11.0 using the Standard audit report:

1. Click the **Analyze Audit Trail** link in the **Administrative Menu** window. The **Audit Report** window appears as:

2. Click the **Filter** button. The details of all the actions performed in Inventory Enterprise 11.0 are displayed in the lower frame of the **Audit Report** window:

- You can filter the actions displayed in the Audit Report window to view information only about the desired actions. The actions can be filtered using the Filter Criteria section of the Audit Report window. The Filter Criteria section lets you filter the actions on the basis of the various fields, which are:
  - Table: Specifies the name of the table, such as Containers, Locations, and Compounds.
  - User: Specifies the user who has performed the action.
  - RID: Specifies the ID of the action.
  - LocationID: Specifies the ID of the location at which the action is performed.
  - ContainerID: Specifies the ID of the container on which the action is performed.
  - From Date and To Date: Specify the range of date, within which the actions performed are to be tracked.
  - Action: Specifies the type of SQL action, such as Delete and Insert.
  - CompoundID: Specifies the ID of the compound on which the action is performed.

3. Specify the required criteria in the **Filter Criteria** section and click the **Filter** button. The filtered actions are displayed in the lower frame of the **Audit Report** window.

AGGREGATE AUDIT REPORT

Aggregate audit report lets you filter the actions by table, user, action, and date. Unlike the Standard audit report, Aggregate audit report provides summarized information and not detailed information about the actions.

In the Aggregate audit report, you can group the filtered results on the basis of either, Table Name, Modified by, or Action fields. For example, you can group the filtered results by Table Name to obtain a list of tables on which a particular user has performed some action. You can also group the filtered results on the basis of hour, day, month, or year.

To audit Inventory Enterprise 11.0 using the Aggregate audit report:

1. Click the **Analyze Audit Trail** link in the Administrative Menu window. The **Audit Report** window appears.

2. Click the **Aggregate** link. The following window appears as:

3. Specify the criteria in the **Filter Criteria** section according to which you want to filter the actions. You can filter the actions on the basis of various fields, which are:

- Table: Specifies the name of the table, such as Containers, Locations, and Compounds.
- User: Specifies the user who has performed the action.
- From Date and To Date: Specify the range of date within which the actions performed are to be tracked.
- Action: Specifies the type of SQL action, such as Delete and Insert.

4. Select the appropriate check boxes corresponding to the fields in the **Group by Fields** section. The filtered result will be grouped according to the selected fields.
5. Select the appropriate radio button in the **Group by Date** section. The filtered result will be grouped according to the selected field.
6. Click the **Filter** button. The result is displayed in the lower frame of the **Audit Report** window.

Custom Reports

The Custom Reports link in the Administrative Menu window lets you generate the custom reports. Custom reports are driven by the report layouts, which specifies the format for the report and the information that is to be included in the report.

For information about creating, editing, and deleting a report layout, see “Creating report layout” on page 79, “Editing report layout” on page 80, and “Deleting report layout” on page 81.

To generate a custom report, see “Generating a custom report” on page 82.

Manage Approvals

The Manage Approvals link in the Administrative Menu window lets you approve or reject the request of certifying a container. For information about placing request for certifying a container, see “Certify container” on page 45.
To approve or reject a certification request:

1. Click the **Manage Approvals** link. The following window appears as:

- This preceding window displays a list of all certification requests placed in Inventory Enterprise 11.0. You can locate the desired request in the list by filtering the list using the **Filter Criteria** section.

2. Filter the list, if required, by specifying the appropriate filter criteria in the **Filter Criteria** section.
3. Select either the **Approve** or **Reject** check box next to the appropriate request to approve or reject the request.
4. Click **OK**.

5. Click **OK** when the success message appears.

Manage Requests

The Manage Requests link in the Administrative Menu window allows the personnel responsible for closing the container requests to close the pending container requests.

Closing a container request refers to fulfilling the container request by delivering the requested container at the specified location. The following figure displays the Manage Container Requests window that appears on clicking the Manage Container Requests link:

The lower frame of the Manage Container Requests window contains a list of pending requests. If the list contains large number of pending requests, you can find the desired container request by filtering the list. The criteria for filtering the list of pending requests can be specified in the Filter Criteria section in the upper frame of the Manage Container Requests window.

In addition to closing the container requests, the Manage Container Requests window also lets you perform other tasks, which are:

- Edit a container request
- View the closed request and undo the closing action

CLOSING A CONTAINER REQUEST

To close a container request:

1. Open the **Manage Container Requests** window.
2. Provide the required information in the **Filter Criteria** section and click the **Filter** button to filter the list of pending requests. Only the requests matching the filter criteria are displayed in the list of pending requests.
3. Select the check box in the **Delivered** column of the request that is to be closed.
4. Click **OK**.

EDITING A CONTAINER REQUEST

To edit a container request:

1. Open the **Manage Container Requests** window.
2. Provide the required information in the **Filter Criteria** section and click the **Filter** button to filter the list of pending requests. Only the requests matching the filter criteria are displayed in the list of pending requests.
3. Click the **Edit** link next to the request that is to be edited. The **Request an Inventory Container** window appears.
4. Make the required changes and click **OK**.

VIEWING CLOSED REQUESTS AND UNDOING A CLOSING ACTION

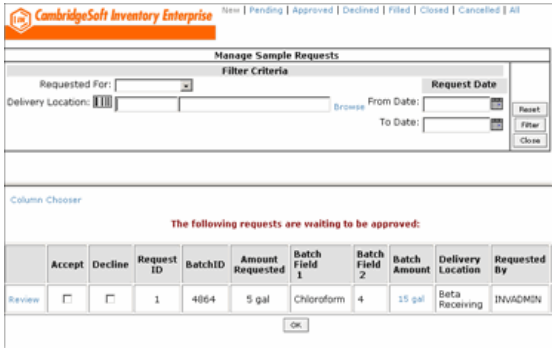
To view all closed requests and undo a request closing action:

1. Click the **Closed Requests** link in the upper frame of the **Manage Container Requests** window.
2. Click the **Undo** link next to the closed request, if you want to undo the closing action for a request. A page asking you to confirm the undo action appears.
3. Click **OK**.

Manage Sample Requests

The Manage Sample Requests link in the Administrative Menu window lets you approve a sample request and deliver the approved request to the desired location or decline a sample request. For information about managing container requests, see “Manage Requests” on page 95.

The following figure displays the Manage Sample Requests window in which the sample requests are managed:



The lower frame of the Manage Sample Requests window displays a list of all the sample requests placed in Inventory Enterprise 11.0. You can locate the desired sample request in the list by filtering the list using the Filter Criteria section.

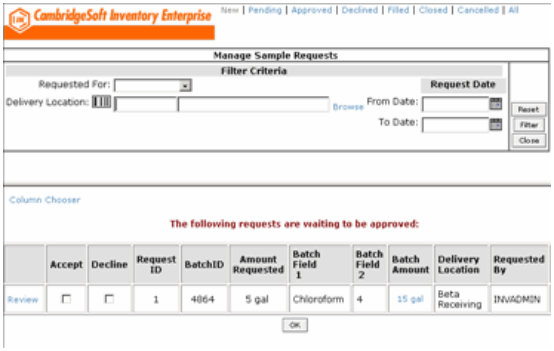
NOTE: You need to click the Filter button to view the list of the sample requests if it is not displayed in the Manage Sample Requests window, when you open the window.

The Manage Sample Requests window consists of various links that allow you to take different actions on the sample requests according to their status, such as New, Approved, Declined, Filled, Closed, and Cancelled. These links are:

- New
- Pending
- Approved
- Declined
- Filled
- Closed
- Cancelled
- All

NEW SAMPLE REQUESTS

New sample requests are the requests that have been placed by a user, but not yet approved or declined by the personnel responsible for fulfilling the sample requests. The New requests can be reviewed, accepted, or declined under the New link in the Manage Sample Requests window. The following figure displays the Manage Sample Requests window with the New link selected:



Reviewing a request

A Review link is available to the left of each request listed in the Manage Sample Requests window. This link allows users to review the details of the requests and edit them, if necessary.

To review a sample request:

1. Click the **Review** link to the left of the appropriate request. The following window appears as:

2. Edit the sample request, if required, and click **OK**.
3. Close the window, which displays a success message.

NOTE: If you edit the address of the delivery location, the address is modified globally and applied to all the sample requests that are to be delivered at that location.

Accepting a request

Accepting a request refers to approving it and marking its status as Approved. A request can be fulfilled only if it is marked as Approved.

To accept a request:

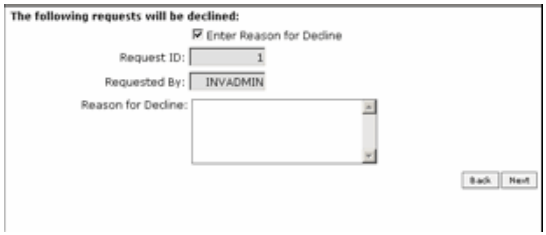
1. Select the **Accept** check box to the right of the appropriate request.
2. Click **OK.**
3. Click **OK** when the success message appears. The request will now appear under the **Approved** link.

Declining a request

Declining a request refers to rejecting a request and marking its status as Declined.

To decline a request:

1. Select the **Decline** check box to the right of the appropriate request.
2. Click **OK**. In the lower frame of the **Manage Sample Requests** window, the following window appears as:



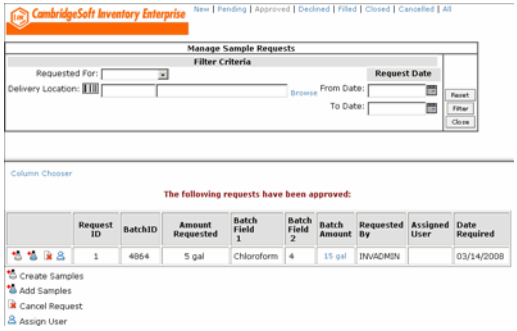
3. Enter the appropriate reason and click **Next**.
4. Click **OK**. The request will now appear under the **Declined** link.

PENDING SAMPLE REQUESTS

Pending sample requests on which no action has been taken. The pending requests can be viewed under the Pending link in the Manage Sample Requests window.

APPROVED SAMPLE REQUESTS

Approved sample requests are the requests that have been approved, but not yet fulfilled. The approved requests can be viewed and fulfilled under the Approved link in the Manage Sample Requests window. The following figure displays the Manage Sample Requests window with the Approved link selected:



Corresponding to each approved request, the following four icons appear:

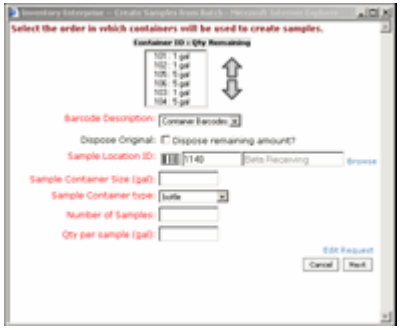
- Create Samples: Allows you create samples for an approved sample request and fulfill it.
- Add Samples: Lets you add samples to an approved sample request and fulfill it.

NOTE: The Add Samples link will work only when the batch of the sample request is marked as Requestable. For more information about editing batch information, see "Summary tab" on page 49.

- Cancel Request: Lets you cancel an approved sample request.
- Assign User: Lets you assign a user to an approved sample request.

To fulfill an approved request:

1. Click the icon to the left of the appropriate request. The **Create Sample from Batch** window appears as:

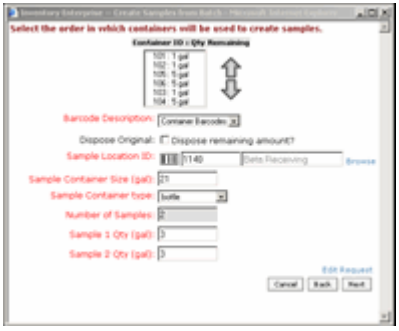


2. Perform the following tasks in the preceding window:

- Specify the location at which the sample containers are to be stored in the **Sample Location ID** text box.
- Type the size of the sample containers in the **Sample Container Size** text box.
- Select the container type in the **Sample Container type** drop down list.
- Specify the number of samples to be created in the **Number of Samples** text box.
- Specify the quantity per sample in the **Qty per sample** text box.

NOTE: Click the Edit Request link if you want to make some changes in the sample request before approving it.

3. Click **Next**. The following window appears as:



4. Click **Next**. The following window appears as:

5. Click **OK**. A success message appears.
6. Click **OK**. The request will now appear under the Filled link.

DECLINED SAMPLE REQUESTS

Declined sample requests are the requests that have been rejected and will never be fulfilled. The declined requests can be viewed under the

Declined link in the Manage Sample Requests window.

NOTE: You can determine the reason due to which a request is declined by clicking the Reason link to the left of the request.

FILLED SAMPLE REQUESTS

Filled sample requests are the requests for which samples have been created, but the requests are not closed yet. The Filled requests can be viewed and closed under the Filled link in the Manage Sample Requests window.

A sample request is closed when the requested sample is delivered at the specified delivery location. In order to deliver the requested sample, you need to create an order for the request and then ship that order to the specified location.

However, if you do not want to close a request by delivering it to the specified delivery location, close the request directly by selecting the Close check box to the right of the request.

Creating an order

To create order for a filled sample request:

1. Click the **Create Order** link to the left of the appropriate request. The **Create or Edit an Order** window appears as:

NOTE: The preceding window contains a list of the sample containers for which the order is to be created.

2. Perform the following tasks in the preceding window:

- Specify the delivery location where you want to ship the order.
- Specify the name of the order in the **Ship To** text box.

3. Click the **Create Order** link. The order is created and an unique ID is generated for it and a success message is displayed.
4. Click **OK**.

CLOSED SAMPLE REQUESTS

Closed sample requests are the requests that have been delivered to the specified locations or marked as Closed under the Filled link. The closed requests can only be viewed. You cannot take any further action on them. The Closed requests can be viewed under the Closed link in the Manage Sample Requests window.

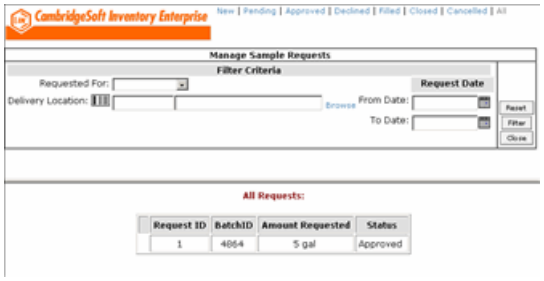
CANCELLED SAMPLE REQUESTS

Cancelled sample requests are the requests that have been cancelled and will never be fulfilled.

The Cancelled requests can be viewed under the Cancelled link in the Manage Sample Requests window. The Cancelled requests can only be viewed. You cannot take any further action on them.

ALL SAMPLE REQUESTS

All the sample requests can be viewed under the All link in the Manage Sample Requests window. The following figure displays the Manage Sample Requests window with the All link selected:



Manage Orders

The Manage Orders link lets you gather information about all the sample request and container orders placed in Inventory Enterprise 11.0. It also lets you create, edit, cancel, and ship orders. The following figure displays the Manage Orders window:

The Manage Orders window contains various links to allow you to manage the orders with different status. These links are:

- New
- Shipped
- Closed
- Cancelled

NEW ORDERS

New orders are the orders that have been created, but not yet shipped. New orders can be viewed and managed under the New link in the Manage Orders window. The following figure displays the Manage Orders window with the New link selected:

The actions that you can take on the new orders under the New link, are:

- Create new orders
- Edit an order
- Cancel an order
- Ship an order

You can also create new orders for sample requests and containers under the New link.

Creating new order

To create order for a sample request or container:

1. Click the **Create Order** link in the lower frame of the **Manage Orders** window. The **Create or Edit an Order** window appears as:

2. Type the ID of the container for which the order is to be created in the **Scan Container Barcode** text box.
3. Press the **Tab** key. The container gets added to the selection list.
4. Repeat steps 2 and 3 for all the required containers.
5. Specify the location at which the order is to be delivered in the **Delivery Location** text box.
6. Type the name of the user responsible for receiving the order in the **Ship To** text box.
7. Click **OK**. A success message appears.
8. Click **OK**.

Editing an order

To edit an order:

1. Click the **Edit** link to the left of the appropriate order. The **Create or Edit an Order** window, containing the order information in the edit mode, appears as:

2. Make the required changes in the order and click the **Update Order** link.

Cancelling an order

To cancel an order:

1. Click the **Cancel** link to the left of the appropriate order. The **Cancel an Order** window appears as:

2. Enter reason for cancelling the order, if required, in the **Reason for Cancel** text area.
3. Click **OK**. The order will now appear under the **Cancelled** link.

Shipping an order

To ship an order:

1. Select the **Ship** check box to the right of the appropriate order.
2. Click **OK**.

3. Click **OK** when the success message appears. The order will now appear under the **Shipped** link.

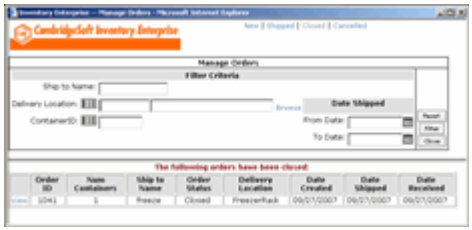
SHIPPED ORDERS

Shipped order are the orders that have been shipped to the specified delivery locations, but not yet received. Shipped orders can be viewed under the Shipped link in the Manage Orders window. The following figure displays the Manage Orders window with the Shipped link selected:

You can view the details of a shipped order by clicking the View link next to the order. You cannot perform any action on the shipped orders in this window.

CLOSED ORDERS

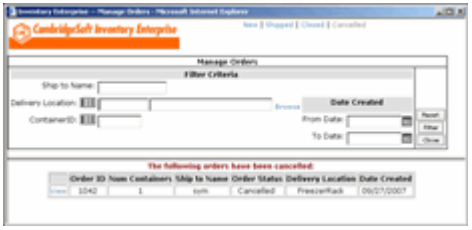
Closed order are the orders that are shipped as well as received. Closed orders can be viewed under the Closed link in the Manage Orders window. The following figure displays the Manage Orders window with the Closed link selected:



You can view the details of a closed order by clicking the View link next to the order. You cannot perform any action on the closed orders.

CANCELLED ORDERS

Cancelled orders are the orders that have been cancelled under the New link. Cancelled orders can be viewed under the Cancelled link in the Manage Orders window. The following figure displays the Manage Orders window with the Cancelled link selected:



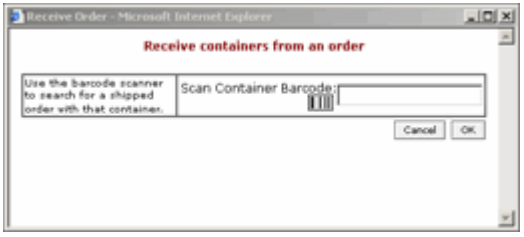
You can gather details of a cancelled order and determine the reason due to which the order is cancelled by clicking the View link next to the order. You cannot perform any action on the cancelled orders.

Receive Order

The Receive Order feature lets you receive a shipped order. When you receive an order, the order is marked as Closed and the ordered containers or requested samples are delivered to the specified location.

To receive an order:

1. Click the **Receive Order** link in the Current Location frame. The **Receive an Order** window appears as:



2. Type the barcode of the container that is to be received in the **Scan Container Barcode** text box.
3. Press the **Tab** key. Observe that the container is scanned and added to the selection list, as shown in this figure:

NOTE: You can remove a container from the list of the scanned containers by clicking the Remove link next to the container. You can remove all the containers from the list by clicking Clear List.

4. Repeat steps 2 and 3 until all the required containers are scanned and added to the list.
5. Ensure that the check boxes next to the containers that are to be received are selected and click the **Receive Containers** link.
6. Click **OK** when the success message appears.

Manage Container Receiving

The Manage Container Receiving feature lets you receive containers that have been ordered through ChemACX. For more information, see “Ordering and receiving containers” on page 54.

Change Password

To change your password:

1. Click the **Change Password** link within the **Manage Security** section in the home page of ChemBioOffice Enterprise. The **Change Password** window appears as:

2. Type the new password in the **New Password** and **Confirm New Password** text boxes.
3. Click **OK**.

Manage Role Locations

The Manage Role Locations link in the Administrative Menu window lets you secure locations by excluding them from specific roles so that users with the specified roles are not able to access the excluded locations. This feature is known as Location Based Security.

NOTE: The Manage Role Locations link is available only for the users who are having cssadmin role.

To secure locations based on roles:

1. Run the AddRLS.cmd file located at:
\Inetpub\wwwroot\ChemOffice\ChemInv\config\oracle_install_scripts\Create_blank_ChemInv_DB
2. Reset IIS on your machine.
3. Log on to the ChemBioOffice Enterprise application.
4. Click the **Tasks** link within the **Inventory Enterprise** section. The **Administrative Menu** window appears.

5. Click the **Manage Role Locations** link within the **Security Management** section. The **Manage Role Locations** window appears as:

6. Select a role from the **Role** drop down list.
7. Click **Next**. The following window appears as:

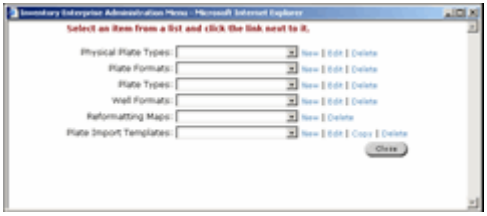
8. Select the locations, which will be excluded for the selected role.
9. Click **OK**. A success message appears.
10. Click **OK** to close the preceding window.
11. Close the **Administrative Menu** window and log off from the ChemBioOffice Enterprise application.
12. Log on to the Inventory Enterprise 11.0 application as an user with the selected role. Observe that the excluded location is not visible in the Location Tree frame.

Plate Settings

The Plate Settings link lets you create, edit, delete and copy a plate setting. The various plate settings that can be created, edited, deleted, and copied using the Plate Settings link, are:

- Physical Plate Types
- Plate Formats
- Plate Types
- Well Formats
- Reformatting Maps
- Plate Import Templates

When you click the Plate Settings link, the following window appears as:



CREATING A NEW PLATE SETTING

To create a new plate setting:

1. Click the **New** link next to the plate setting that is to be created.
2. Provide the required information.

> *NOTE: Fields highlighted in red are the required fields.*

3. Click **OK**.

EDITING A PLATE SETTING

To edit a plate setting:

1. Select the plate setting that is to be edited from the appropriate drop down list.
2. Click the **Edit** link next to the plate setting.
3. Make the required changes.

> *NOTE: Fields highlighted in Red are required.*

4. Click **OK**.

> *NOTE: Editing cannot be done for the reformatting maps. Reformatted maps can only be created and deleted.*

DELETING A PLATE SETTING

To delete a plate setting:

1. Select the plate setting that is to be deleted from the appropriate drop down list.
2. Click the **Delete** link next to the plate setting.

NOTE: Fields highlighted in Red are required.

3. Click **OK**.

COPYING A PLATE SETTING

Copies can be created only for the Plate Import templates. To copy a Plate Import template:

1. Select the Plate Import template that is to be copied from the **Plate Import Templates** drop down list.
2. Click the **Copy** link.
3. Click **OK**.

Creating a plate from Excel spreadsheet

You can create plates from the data contained in an Excel spreadsheet. The conditions wherein it is useful to create plates from the Excel spreadsheet are:

- You need to reformat the plates, especially when you want to merge the 4 96 well plates into 1 384 well plate. You can perform this action using the 4 96 Well to 1 384 Well Map template.
- You need to create multiple daughter plates in a single step. You can perform this action using the Daughter template.

NOTE: If you want to daughter only one plate from the parent plate, you should create the daughter plate using the Create Daughter Plates link in the Plate Details frame.

The columns of the Excel spreadsheet used for creating plates in this section, are:

- No: Specifies a sequential number corresponding to each parent plate.
- Quadrant 1, Quadrant 2, Quadrant 3, Quadrant 3: Specify barcodes of the parent plates.
- Plate Format: Specifies format of the target plates.
- Plate Type: Specifies type of the target plates.
- Plate Template: Specifies name of the plate maps from which the target plates are to be created.
- Barcode: Specifies barcode of the target plates.
- Copies: Specifies the number of copies that are to be created for the target plates.
- Assign to Library: Specifies the library to which the target plates are to be assigned.
- Place in Location: Specifies the location at which the target plates are to be stored.
- Status: Specifies the status that is to be assigned to the target plates.

To create plates from an Excel sheet:

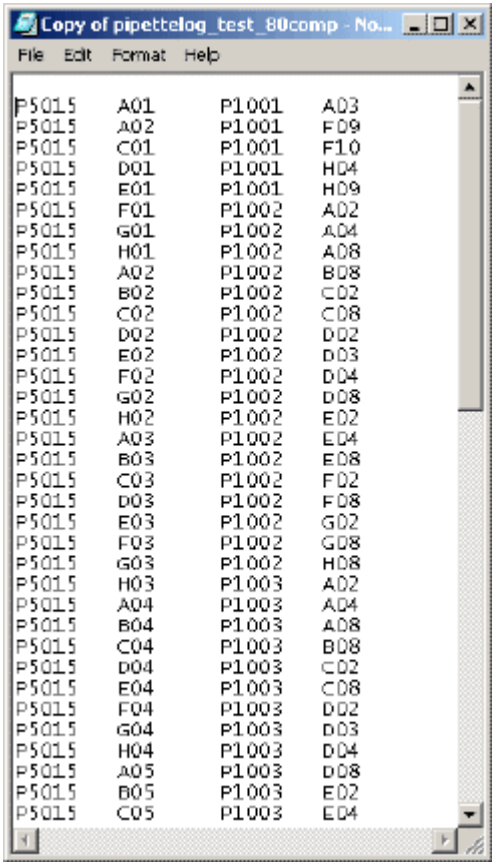
1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.
2. Click the **Create Plates from Excel** link. The **Create Plates From Excel** window appears as:

3. Click the **Browse** button and locate the Excel spreadsheet from which the plates are to be created.

4. Click **OK**. Observe that the new plates are created at the specified location.

Creating a plate from text file

Inventory Enterprise 11.0 lets you create plates from the data contained in a text file. The following figure displays a sample text file that can be used to create plates in Inventory Enterprise 11.0:



The preceding text file consists of one header line and four columns. The four columns of the text file are:

- Target plate barcode: Specifies barcode of the target plate.
- Target well coordinates: Specifies coordinates of the wells of the target plate.
- Source plate barcode: Specifies barcode of the source plate.
- Source well coordinates: Specifies coordinates of the wells of the source plate.

To create a plate from a text file, you should have a Plate Import template for the text file. For information about already existing Plate Import templates, see “Plate import templates” on page 108.

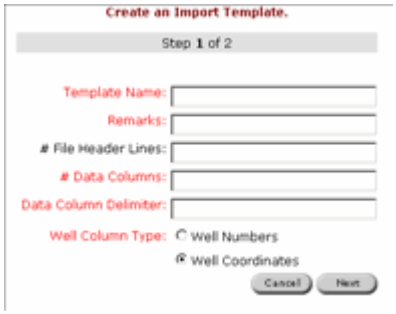
However, if the template is not available already, you can create a new Plate Import template for the text file.

CREATING NEW PLATE IMPORT TEMPLATE

To create a Plate Import template for the preceding text file:

1. Click the **Tasks** link within the **Inventory Enterprise** section in the home page of ChemBioOffice Enterprise. The **Administrative Menu** window appears.
2. Click the **Plate Settings** link. The following window appears as:

3. Click the **New** link next to the **Plate Import Templates** drop down list. The following page appears as:



4. Perform the following tasks in the preceding page:

- Enter the name of the template in the **Template Name** text box.
- Enter remarks in the **Remarks** text box.
- Enter **1** in the **File Header Lines** text box, as the text file contains only one header line.
- Enter **4** in the **Data Columns** text box, as the text file contains four columns.
- Enter **tab** in the **Data Column Delimiter** text box, as the text file is tab delimited.
- Select the **Well Coordinates** check box, as the text file contains well coordinates and not the well numbers.

5. Click **Next**. The preceding window is populated with some additional fields, as shown in this figure:

6. Perform the following tasks in this window:

- Select **Target Plate Barcode** from the **Column 1 Mapping** drop down list.
- Select **Target Well** from the **Column 2 Mapping** drop down list.
- Select **Source Plate Barcode** from the **Column 3 Mapping** drop down list.
- Select **Source Well** from the **Column 4 Mapping** drop down list.

7. Click **OK**. A window informing you that the template is created successfully appears.
8. Click **OK**.
9. Click the **Close** button.

After creating the Plate Import template for a text file, you can create two types of plates, which are:

- Target plates: Refers to the plates that are created from the plates existing already in Inventory Enterprise 11.0.
- Source plates: Refers to the new plates that are created with the new compounds, which do not exist in Inventory Enterprise 11.0. While creating a source plate, you cannot insert compounds in it.

For information about creating target and source plates, see “Creating a target plate” on page 60 and “Creating a source plate” on page 60.

The table below provides information about the already existing Plate Import templates:

Template Name	# of Header Rows	File Delimiter	# of Columns
CS Default	0	comma	30
Source/Target Plate-Tab Delimited	c	tab	2
Source/Target Well-Tab Delimited	0	tab	4
Source/Target Unified-Comma Delimited	7	comma	14
Source/Target Z Pattern-Comma Delimited	0	comma	7

CS Default

The CS Default template can be used to import the text file that is delimited by commas and does not contain any header line. This import template is not plate format specific.

The columns of the text file supported by the CS Default template are:

- A: Contains source plate barcode
- B: Contains well number
- C: Contains target plate barcode
- D: Contains target well number
- E: Contains initial quantity
- F: Contains units of measure ID
- G: Contains concentration
- H: Contains units of concentration ID
- I: Contains solvent ID
- J: Contains field 1
- K: Contains field 2
- L: Contains field 3
- M: Contains field 4

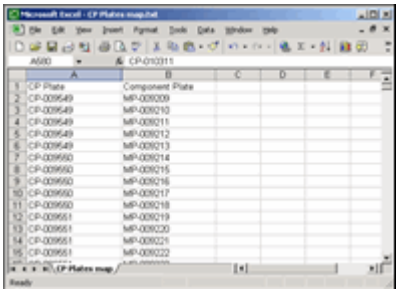
- N: Contains field 5
- O: Contains field 6
- P: Contains field 7
- Q: Contains well field 1
- R: Contains well field 2
- S: Contains well field 3
- T: Contains well field 4
- U: Contains well field 5
- V: Contains well date 1
- W: Contains well date 2

Source/Target Plate-Tab Delimited

The Source/Target Plate-Tab Delimited template can be used to import the text file that is delimited by tabs and contains 1 header line. This import template is not plate format specific. The table below lists the columns of the text file supported by the Source/Target Plate-Tab Delimited template:

Column	Description
A	Contains target plate barcode
B	Contains source plate barcode

The following figure displays a Excel spreadsheet that contains the contents of the text file supported by the Source/Target Plate-Tab Delimited template:



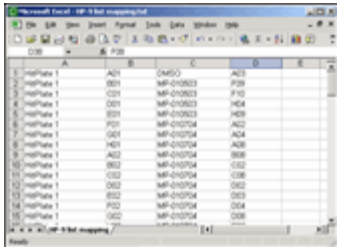
NOTE: The preceding Excel spreadsheet is created so that the number of header lines and column in the text file can be determined easily. You cannot import this Excel spreadsheet using the Source/Target Plate-Tab Delimited template.

Source/Target Well-Tab Delimited

The Source/Target Well-Tab Delimited template can be used to import the text file that is delimited by tabs and does not contain any header line. This import template is not plate format specific. The table below lists the columns of the text file supported by the Source/Target Well-Tab Delimited template:

Column	Description
A	Contains target plate barcode
B	Contains target well coordinate
C	Contains source plate barcode
D	Contains source well coordinate

The following figure displays a Excel spreadsheet that contains the contents of the text file supported by the Source/Target Well-Tab Delimited template:



NOTE: The preceding Excel spreadsheet is created so that the number of header lines and column in the text file can be determined easily. You cannot import this Excel spreadsheet using the Source/Target Well-Tab Delimited template.

Source/Target Unified-Comma Delimited

The Source/Target Unified-Comma Delimited template can be used to import the text file that is delimited by commas and contains 7 header lines. This import template is not plate format specific. The table below lists the columns of the text file supported by the Source/Target Unified-Comma Delimited template:

Column	Description
A	N/A
B	N/A
C	N/A
D	N/A
E	Contains source plate barcode
F	Contains source well number
G	N/A
H	N/A
I	N/A
J	Contains target plate barcode
K	Contains target well number
L	N/A
M	N/A
N	N/A

Source/Target Z Pattern-Comma Delimited

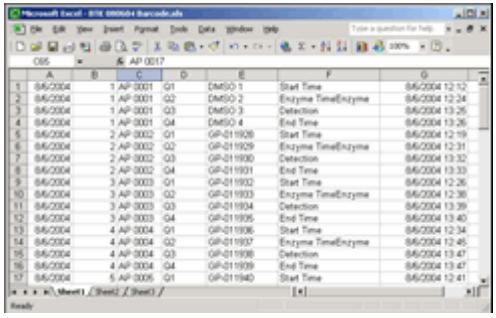
The Source/Target Z Pattern-Comma Delimited template can be used to import the text file that is delimited by commas and does not contain any header line. This template uses the z pattern interleaving process to layout the new plate.

The Source/Target Z Pattern-Comma Delimited template is usually used to create 1-384 well plates from 4-96 well plates. The table below lists the columns of the text file supported by the Source/Target Z Pattern-Comma Delimited template:

Column	Description
A	N/A

Column	Description
B	N/A
C	Contains target plate barcode
D	Contains target quadrant
E	Contains source plate barcode
F	N/A
G	N/A

The following figure displays a Excel spreadsheet that contains the contents of the text file supported by the Source/Target Z Pattern-Comma Delimited template:



NOTE: The preceding Excel spreadsheet is created so that the number of header lines and column in the text file can be determined easily. You cannot import this Excel spreadsheet using the Source/Target Z Pattern-Comma Delimited template.

Managing organizations

Inventory Enterprise 11.0 lets you define organizations and their constituent users so that when reserving a sample, you can specify the organization for which you are reserving the sample.

CREATING AN ORGANIZATION

To create an organization:

1. Click the **New** link within the **Organization Management** section in the **Administrative Menu** window. The **Manage Organizations** window appears as:

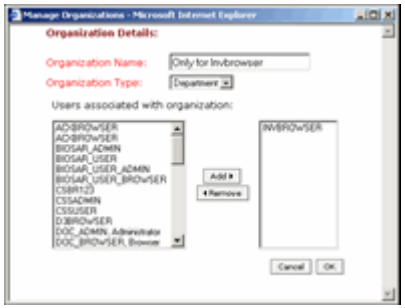
2. Enter the name of the organization in the **Organization Name** text box.
3. Select the type of organization in the **Organization Type** drop down list.
4. Add the users associated with the organization using the **Add** button.
5. Click **OK** to create the organization.

EDITING AN ORGANIZATION

To edit the information related to an organization:

1. Open the **Administrative Menu** window.
2. Select an existing organization from the **Organizations** drop down list in the **Organization Management** section.

3. Click the **Edit** link. The **Manage Organizations** window appears as:



4. Edit the information as per your requirements and click **OK**. A success message appears.
5. Click **OK**.

DELETING AN ORGANIZATION

To delete an existing organization:

1. Select an existing organization from the drop down list corresponding to **Organizations** within the **Organization Management** section, in the **Administrative Menu** window.
2. Click the **Delete** link. A confirmation window appears.
3. Click **OK**. A success message appears.
4. Click **OK** to close the preceding window.

Integrating with Registration Enterprise

Inventory Enterprise 11.0 seamlessly integrates with Registration Enterprise and lets you directly access compounds stored in the Registration Enterprise database. However, in order to integrate, you need to make changes in the configuration settings of the Inventory Enterprise 11.0 application.

To integrate Inventory Enterprise 11.0 with Registration Enterprise:

1. Open the invconfig.ini file located at: \\Inetpub\wwwroot\ChemOffice\ChemInv\config.
2. Set the value of the REG_SERVER_NAME parameter to your server name, in the CHEMREG section. The server should be the system, which is hosting the Registration Enterprise application.
3. Save the changes and reset IIS on your system.
4. Run the RegistrationIntegration.cmd file located at: \\Inetpub\wwwroot\ChemOffice\ChemInv\config\oracle_install_scripts\Create_blank_ChemInv_DB\sql\Update_Scripts\.
5. Reset IIS on your system.

After you have integrated Registration Enterprise with Inventory Enterprise 11.0, you can perform the following tasks:

- Create a new container using a substance in Registration Enterprise
- Search for a substance in Registration Enterprise database

CREATING A CONTAINER USING REGISTRATION ENTERPRISE

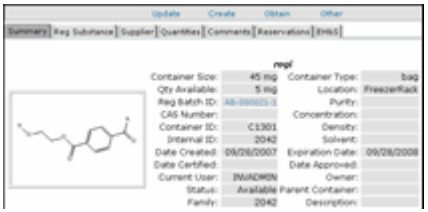
To create a new container using a substance in Registration Enterprise:

1. Open the Inventory Enterprise 11.0 application.
2. Click the **New Container** link in the Current Location frame. The **Create or Edit an Inventory Container** window appears.

3. Click the **Select Substance** link. The following window appears as:

4. Ensure that **Registration Enterprise** check box is selected.
5. Search for a substance and click the Details link corresponding to the required substance. The following window appears as:

6. Click the **select** link corresponding to the desired container. The **Required** tab window of the **Create or Edit an Inventory Container** window appears.
7. Enter details about the container to be created.
8. Click **OK**. The Container Details frame displays the **Reg Substance** tab as shown in this figure:



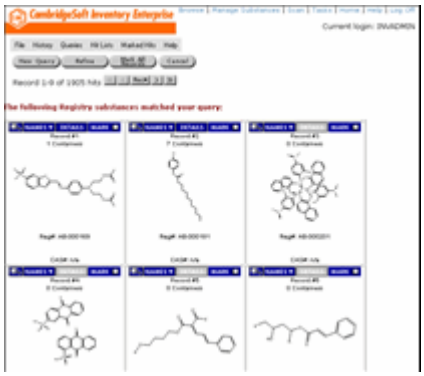
SEARCHING REGISTRATION ENTERPRISE

Search for a substance in Registration Enterprise database:

1. Click the **Search** link in the Current Location frame of the Inventory Enterprise 11.0 home page to display the search window.
2. Click the **Global Search** tab. The following window appears as:

3. Ensure that only **Registration Enterprise** check box is selected.

4. Specify the search criteria and click the **Search** button. The search result appears as:



Inventory Enterprise 11.0 form fields

The form fields available in Inventory Enterprise 11.0 are:

- Substance/batch attributes
- Plate attributes
- Other
- Container attributes

Substance/Batch attributes

- ACX Number: Holds the ACX number and registry number for the substances stored in ChemACX and ChemBioFinder and the substances submitted by Open Chemistry. The ACX number can be up to 15 characters. This is a text field.
- CAS Registry: Holds CAS registry number, which is a unique accession number assigned by the Chemical Abstracts Service, a division of the American Chemical Society. This field ensures uniqueness of a compound and is assigned to every uniquely-identifiable compound. This is a text field.
- Compound ID: Holds the compound ID, which identifies a compound in the Inventory Enterprise 11.0 database. Compound ID is generated automatically when the compound is entered into Inventory Enterprise 11.0. This number is linked to the compound name and other information in the Inventory Enterprise 11.0 database. ACX Number is a numeric field.
- Compound Type: Holds the compound type. Compound Type is a text field.
- Concentration: Holds concentration of a substance stored in a container or plate. Concentration is a calculation, which gives information about the amount of the substance within a mixture in a container or plate. Concentration is a numeric field.
- Density: Holds the density of the compound. Density is a numeric field.
- Grade: Holds grade, which is a way to categorize certain attributes of the contents of a container. Grade is a text field.
- Molecular Formula: Holds molecular formula of a substance. Molecular formula is a method of describing the makeup of a substance on atomic level. The Molecular Formula field is set automatically when the substance is inserted into a form. Molecular Formula is a text field.
- MolWeight Range: Contains the molecular weight range of the substance. MolWeight Range is a text field.
- Purity: Holds the purity of a mixture. Purity is a calculation reflecting how much of a mixture is purely the substance recorded. Purity is a numeric field.
- Reg Alternate IDs: Holds the alternate registration IDs for the compound. Reg Alternate IDs is a text field.

- Registry Batch ID: Holds the registry batch ID. The registry batch ID is the registration and batch number identifier assigned by Registration Enterprise. This number lets you relate compounds in Registry Enterprise to Inventory Enterprise 11.0. Registry Batch ID is a text field.
- Reg Number: Holds the registry number of the compound. Reg Number is a text field.
- Registry Sequence: Holds the registry sequence of the compound. Registry Sequence is a text field.
- Solvent: Holds the name of the solvent for the substance. A solvent is a substance capable of dissolving another substance. Solvent is a text field.
- Substance Name: Holds the name of the substance. Substance Name is a text field.
- Substance Synonym: Holds the synonyms of the substance. Substance Synonym is a text field.
- Substructure: Holds the structure or substructure of a substance. The structure of a substance is drawn using the ChemDraw plug-in. Substructure is a Structure field.
- Salt Name: Holds the name of the salt associated with a compound in Registration Enterprise. Salt Name is a text field.
- Salt Equivalents: Holds the salt equivalent associated with a compound in Registry Enterprise. Salt Equivalents is a number field.

Plate attributes

- Concentration: Holds concentration of a substance stored in a container or plate. Concentration is a calculation which gives information about the amount of the substance within a mixture in a container or plate. You can specify any of the following units for concentration: microgram/milliliter, micromolar, mili molar, molar, normal, parts per million, and percent. To specify unit for the concentration, select the appropriate unit from the drop down list to the right of the Concentration text box. Concentration is a numeric field.
- F/T Cycles: Contains the number of freeze thaw cycles for a plate. This number should be an integer amount. F/T Cycles is an integer field.
- Group Name: Holds the name of the group to which a plate belongs. Group Name is a text (picklist) field.
- Library: Holds the name of the library that a plate is a part of. Library is a text field.
- Molar Amount: Holds the number of moles of a compound contained in a well. Molar Amount is a numeric field.
- Plate Format: Holds a list of all the plate formats defined in Inventory Enterprise 11.0. A plate format specifies how to distribute compounds to the wells of a plate. It specifies whether a well of a plate should contain a compound, positive control, or negative control, or left empty. Plate Format is a text (picklist) field.
- Plate ID (Internal): Holds plate ID for a plate. Plate ID is a unique number that identifies a plate in the Inventory Enterprise 11.0 database. It is generated automatically when the plate is created in Inventory Enterprise 11.0. Plate ID is linked to the plate name and other information in the Inventory Enterprise 11.0 database. Plate ID (Internal) is a numeric field.
- Plate ID (Barcode): Holds the barcode of a plate. Plate ID (Barcode) is a text field.

- Plate Name: Holds the name of the plate, which lets you identify the plate. Plate Name is a text field.
- Plate Status: Allows a user to specify status of a plate. Plate status describes the current state of a plate. The possible states for a plate are: Unknown, Tested, Untested, and Destroyed. Plate Status is a text (picklist) field.
- Plate Type: Provides a list of plate types from which a user can select the required type for a plate. The following is the default list to choose from: Assay Plate, Master Plate, Replicate Plate, Source Plate, and Working Plate. Plate Type is a text (picklist) field.
- Solvent: Holds the name of the solvent for the substance. A solvent is a substance capable of dissolving another substance. Solvent is a numeric field.
- Source Volume Taken: Holds the volume of the substance transferred from a source plate to a daughter plate, while the daughter plate is being created from the source plate. Unit for the volume is specified by selecting the appropriate value from the drop down list to the right of the Source Volume Taken text box. Source Volume Taken is a numeric field.
- Weight: Holds the current weight of a plate. Weight is a numeric field.
- Well Capacity: Holds the maximum capacity of a well of a plate. Well Capacity is a numeric field.
- Date Created: Holds the creation date for a plate. Date Created is a numerical date field.

Other

- Comments: Holds details of the information already been entered in a field or additional information that has not already been entered in any other field in Inventory Enterprise 11.0. Comments is a text field.
- Current User: Holds the current user of the container. Current User is a text (picklist) field.
- Job: Holds the job for which the container is being ordered. The list of jobs varies with the project selected in the Project field. Job is a text (picklist) field.
- Owner: Holds the name of the owner of the container. Owner is a text (picklist) field.
- Project: Holds the project for which the containers is being ordered. The jobs available in the Jobs drop down list change with the project selected in the Project field. Project is a text (picklist) field.
- Reorder Reason: Holds the reason because of which a container is being reordered. Reorder Reason is a text (picklist) field.
- Ordered By: Holds the user, who orders a container. Ordered By is a text (picklist) field.

Container attributes

- Catalog Number: Holds the catalog number, which is created by the supplier of a substance for ordering purpose. Catalog Number is a text field.
- Container Cost: Holds the cost of a container. The unit of the value entered into this field is dollar, by default. Container Cost is an integer field.
- Container ID (Barcode): Holds the container barcode. A unique barcode is generated for a container automatically, when the

container is created in Inventory Enterprise 11.0. Container ID (Barcode) is a text field.

- Container ID (Internal): Holds internal ID of a container. Internal ID is used to identify the container in the Inventory Enterprise 11.0 database. It is generated for a container automatically, when the container is created in Inventory Enterprise 11.0. Container ID (Internal) is a text field.
- Container Name: Holds the name of a container, which allows a user to identity the container in Inventory Enterprise 11.0. Container Name is a text field.
- Container Size: Holds the size of a container. The unit of the container size is specified in the Units of Measure field. Container Size is a numeric field.
- Container Status: Holds the status of a container. The status of a container describes the current state of the container. The possible states for a container are: Available, Empty, Order Pending, Ordered, In transit, Disposed, Missing, Unknown, Canceled, In Use, Order Item Submitted, Ordered Item with Registration Error, Backordered Item, Discontinued Item, Recognized at Dock, Received, Requested, Not Enough Available, Item Found, To Be Returned, Returned, Moved During Reconcile Location, and Missing During Reconcile Location. Container Status is a text (picklist) field.
- Container Type: Holds the type of a container. A container can be of any of the following types: bag, bottle, vial, tube, box, can, case, cylinder, drum, fiber drum, palette, plate, unknown, and sure-seal bottle. Container Type is a text (picklist) field.
- Date Ordered: Holds the date on which the container was ordered. Date Ordered is a numerical date field.
- Date Produced: Holds the date on which the contents of the container were produced. Date Produced is a numerical date field.
- Date Received: Holds the date on which the container was received. Date Received is a numerical date field.
- Destination Location: Allows users to specify the location, where the container is to be moved. You can specify the location in this field either by typing the barcode of the location in the field or by clicking the Browse link next to the field to open a location tree. You can then browse though the location tree to find the required location and select the location to insert it into the Destination Location field. The Destination Location field is a text field.
- Due Date: Holds the date by which the ordered container needs to be delivered. Due Date is a date field.
- Expiration Date: Holds the expiration date of the contents of the container. Expiration Date is a numerical date field.
- Location Barcode: Holds the barcode for a location. Location Barcode is a text field.
- Location Description: Holds the description of a location. Location Description is a text field.
- Location ID: Holds the location ID, which is a unique number that identifies a location in the Inventory Enterprise 11.0 database. It is automatically generated when the location is entered into Inventory Enterprise 11.0. The location ID is linked to the location name and other information in the

Inventory Enterprise 11.0 database. Location ID is a numeric field.

- Location Name: Holds the name of the location, which lets you identify the location. Location Name is a text field.
- Location Type: Allows users to specify the type of location, such as bench, bin, box, building, and cabinet. Location Type is a text (picklist) field.
- Lot Number: Holds the lot number of the supplier. Lot Number is a text field.
- Minimum stock threshold: Holds the minimum stock threshold value for a substance. Minimum stock threshold value indicates the minimum amount of the substance that should always be available in the stock. Minimum stock threshold is a numeric field.
- Maximum stock threshold: Hold the maximum stock threshold value for a substance. The maximum stock threshold value indicates the maximum amount of the substance that can be made available in the stock. Maximum stock threshold is a numeric field.
- Net Weight: Holds the net weight of a container. Net weight is the value obtained after deducting the tare weight of the container from the initial gross weight of the container and its contents. The unit in which the net weight is measured is mass and the unit for the net weight is specified in the Unit of Weight field. Net Weight is a numeric field.
- Number of Bottles: Holds the number of containers that are to be ordered, and therefore to be created in Inventory Enterprise 11.0. Number of Bottles is an integer field.
- Number of Copies: Indicates how many copies of a container are to be created while the container is being copied. Number of Copies is an integer field.
- PO Number: Holds the purchase order number for a container. PO Number is a text field.
- PO Line Number: Holds the PO line number. PO Line Number is a numeric field.
- Qty Available or Initial: Holds the total amount of substance available in a container, excluding the amount of substance that has already been reserved. Qty Available or Initial is a numeric field.
- Qty Remaining: Holds the total amount of substance remaining in a container, including the amount of substance that has already been reserved. Qty Remaining is a numeric field.
- Requisition Number: Holds the supplier's requisition number. This is a text field.
- Reservation Date: Holds the date on which a reservation is made. Reservation Date is a numerical date field.
- Reservation Quantity: Holds the quantity of the substance reserved for future use. Reservation Quantity is a numeric field.
- Reservation Status: Holds the status of a reservation. Reservation Status is a text field.
- Reservation Type: Holds the type of reservation. You can create following types of reservations in Inventory Enterprise 11.0: External Hold, Internal Hold, Sale Pending, Sold, Undeclared. Reservation Type is a text (picklist) field.
- Supplier Name: Holds the name of the supplier. Supplier Name is a text field.

- Supplier Shipment Code: Holds the supplier shipment code. Supplier Shipment Code is a text field.
- Supplier Shipment Date: Holds the shipment date. Supplier Shipment Date is a numeric date field.
- Supplier Shipment Number: Holds the supplier shipment number. Supplier Shipment Number is a text field.
- Tare Weight: Holds the tare weight of the container. Tare Weight is a text field.
- Total Weight: Holds the total weight of the substance stored in a container. The unit of the value entered in the Total Weight field is specified in the Unit of Weight field. Total Weight is a text field.
- Unit of Concentration: Allows users to specify the unit of the concentration. Unit of Concentration is a text (picklist) field.
- Unit of Quantity: Holds the units for the values of the Qty Available and Qty Remaining fields. Unit of Quantity is a text (picklist) field.
- Unit of Measure: Allows users to specify the unit in which the substance stored in the container is to be measured. Unit of Measure is a text (picklist) field.
- Unit of Weight: Allows users to specify units for the Net Weight, Tare Weight, and Total Weight fields. Unit of Weight is a text (picklist) field.

Roles

Different users need to perform different tasks using Inventory Enterprise 11.0. Therefore, while setting up new user accounts, system administrator assigns different roles to different users. Each Inventory role is assigned specific privileges, which specify the task that can be performed using the role. For example, BROWSER only has the privilege to read the contents of a container, however, INV_CHEMIST is allowed to move and edit the contents of a container, as well.

The table below lists the roles available in Inventory Enterprise 11.0 and the Oracle role name and privileges associated with each role:

Role Name	Oracle Role Name	Privileges
BROWSER	INV_BROWSER	Read Only
CHEMIST	INV_CHEMIST	Edit/Move Containers
RECEIVING	INV_RECEIVING	Create/Edit/Move Containers
FINANCE	INV_FINANCE	Create/Edit/Move Containers + Create/Move/Delete Locations
REGISTRAR	INV_REGISTRAR	Create/Edit/Delete inventory substances

Role Name	Oracle Role Name	Privileges
ADMIN	INV_ADMIN	Full Access

NOTE: The help for each API function indicates the role necessary to perform the function.

Privileges

The privileges in Inventory Enterprise, their Oracle names, and associated roles are:

- Change the quantity in a container
  - Oracle Privilege Name: INV_CHANGEQTY_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, FINANCE, ADMIN
- Change a container status
  - Oracle Privilege Name: INV_CHANGE_STATUS_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, RECEIVING
- Check out/in a container
  - Oracle Privilege Name: INV_CHECKOUT_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, ADMIN
- Check out/in a container
  - Oracle Privilege Name: INV_CHECKIN_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, ADMIN
- Reserve a container
  - Oracle Privilege Name: INV_RESERVE_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, ADMIN
- Retire a container
  - Oracle Privilege Name: INV_RETIRE_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, FINANCE, ADMIN
- Print a container's label
  - Oracle Privilege Name: INV_PRINT_LABEL_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, FINANCE, RECEIVING, REGISTRAR, ADMIN
- Print a report
  - Oracle Privilege Name: INV_PRINT_REPORT
  - Role(s) Associated with Privilege: CHEMIST, FINANCE, RECEIVING, REGISTRAR, ADMIN
- Create a new location
  - Oracle Privilege Name: INV_CREATE_LOCATION
  - Role(s) Associated with Privilege: FINANCE, ADMIN
- Edit a location
  - Oracle Privilege Name: INV_EDIT_LOCATION
  - Role(s) Associated with Privilege: FINANCE, ADMIN
- Move a location

- Oracle Privilege Name: INV_MOVE_LOCATION
- Role(s) Associated with Privilege: FINANCE, ADMIN

- Delete a location
  - Oracle Privilege Name: INV_DELETE_LOCATION
  - Role(s) Associated with Privilege: FINANCE, ADMIN
- Create a new container
  - Oracle Privilege Name: INV_CREATE_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, FINANCE, RECEIVING, ADMIN
- Edit a container
  - Oracle Privilege Name: INV_EDIT_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, FINANCE, RECEIVING, ADMIN
- Move a container
  - Oracle Privilege Name: INV_MOVE_CONTAINER
  - Role(s) Associated with Privilege: CHEMIST, FINANCE, RECEIVING, ADMIN
- Delete a container
  - Oracle Privilege Name: INV_DELETE_CONTAINER
  - Role(s) Associated with Privilege: FINANCE, RECEIVING, ADMIN
- Add/edit/delete links
  - Oracle Privilege Name: INV_MANAGE_LINKS
  - Role(s) Associated with Privilege: REGISTRAR, ADMIN
- Add/edit/delete substances
  - Oracle Privilege Name: INV_MANAGE_SUBSTANCES
  - Role(s) Associated with Privilege: REGISTRAR, ADMIN
- View audit trails
  - Oracle Privilege Name: INV_VIEW_AUDIT_TRAIL
  - Role(s) Associated with Privilege: FINANCE, REGISTRAR, ADMIN
- Update a location
  - Oracle Privilege Name: INV_UPDATE_LOCATION_CONTENTS
  - Role(s) Associated with Privilege: Associated with a role by the ADMIN role, when required.
- Rectify a location
  - Oracle Privilege Name: INV_RECTIFY_LOCATION_CONTENTS
  - Role(s) Associated with Privilege: ADMIN
- Order a container
  - Oracle Privilege Name: INV_ORDER_CONTAINER
  - Role(s) Associated with Privilege: Associated with a role by the ADMIN role, when required.
- Reorder a container
  - Oracle Privilege Name: Associated with a role by the ADMIN role, when required.
  - Role(s) Associated with Privilege: INV_REORDER_CONTAINER
- Certify container
  - Oracle Privilege Name: INV_CERTIFY_CONTAINER

    - Role(s) Associated with Privilege: Associated with a role by the ADMIN role, when required.
- Approve containers
    - Oracle Privilege Name: INV_APPROVE_CONTAINER
    - Role(s) Associated with Privilege: Associated with a role by the ADMIN role, when required.
- Edit EH&S data
    - Oracle Privilege Name: INV_EDIT_EHS_DATA
    - Role(s) Associated with Privilege: Associated with a role by the ADMIN role, when required.
- Create plate
    - Oracle Privilege Name: INV_CREATE_PLATE
    - Role(s) Associated with Privilege: ADMIN, CHEMIST, FINANCE, RECEIVING
- Move plate
    - Oracle Privilege Name: INV_MOVE_PLATE
    - Role(s) Associated with Privilege: ADMIN, CHEMIST, FINANCE, RECEIVING
- Edit plate
    - Oracle Privilege Name: INV_EDIT_PLATE
    - Role(s) Associated with Privilege: ADMIN, CHEMIST, FINANCE, RECEIVING
- Retire Plate
    - Oracle Privilege Name: INV_RETIRE_PLATE
    - Role(s) Associated with Privilege: ADMIN, CHEMIST
- Dilute Plate
    - Oracle Privilege Name: INV_DILUTE_PLATE
    - Role(s) Associated with Privilege: ADMIN, CHEMIST
- Delete Plate
    - Oracle Privilege Name: INV_DELETE_PLATE
    - Role(s) Associated with Privilege: ADMIN, CHEMIST, FINANCE, RECEIVING
- Print Label Plate
    - Oracle Privilege Name: INV_PRINT_LABEL_PLATE
    - Role(s) Associated with Privilege: ADMIN, CHEMIST, FINANCE, RECEIVING
- Manage Plate Maps
    - Oracle Privilege Name: INV_MANAGE_PLATE_MAPS
    - Role(s) Associated with Privilege: ADMIN

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