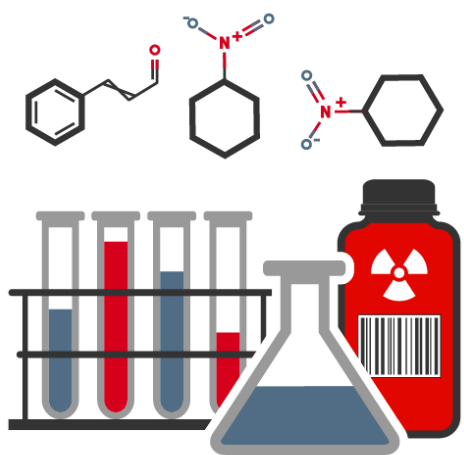




ENTERPRISE REAGENT MANAGER VERSION 9.3

RELEASE PREVIEW



ENTERPRISE REAGENT MANAGER

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VERSION 9.3

PREPARED BY



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Table of Contents

ENTERPRISE REAGENT MANAGER VERSION 9.3.....	1
Welcome	1
Objectives	1
Training Opportunities	1
ERM 9.3 – The Big Picture	2
Central Receiving.....	2
Storeroom Request Fulfillment	2
Container Search	3
Container Transactions.....	3
New Storage Compatibility.....	4
Improved Container Rules.....	4
Other Functional Improvements	4
Security, Integration, and Administration	5

Welcome

Enterprise Reagent Manager 9.3.0 will be released on December 18, 2017.

Objectives

The goal of this document is to provide information about major release themes and general information about features related to those themes.

Note: This document is not intended to provide an exhaustive list of features included in the release. **Product Release Notes** will include detailed information about all ERM 9.3.0 features.

Training Opportunities

To help prepare you for the 9.3.0 release, various educational opportunities are provided by SciQuest. Each of these opportunities is detailed below.

Webinar Name	Date and Time	Description and Details
Preview Webinar (pre-recorded video)	Available on the Product Release Library by Nov 30, 2017	The pre-recorded video will present a preview of features coming in release 9.3.0.
Release review (with recording to follow)	January, 2017	This webinar will review the key features of ERM 9.3.0 and will be recorded for future reference

ERM 9.3 – The Big Picture

ERM 9.3 brings the new ERM 9 user experience to support staff who manage the day-to-day – and ad hoc – needs of complex research operations. Release highlights include:

- Expanded support for central receiving operations
- Fulfillment of storeroom requests, with new monitoring panel for incoming requests in multi-storeroom operations
- Enhanced container searching
- Migrated and improved container transactions
- ***New* Storage compatibility**
- Improved container rules configuration

Central Receiving

ERM 9.2 introduced a new user experience for researchers receiving containers directly in their labs. ERM 9.3 expands on that base to add features for central receiving operations.

- Integration with lab balances to capture tare weight on receipt
- ***New*** Ability to weigh containers measured in volume units
- Streamlined, one-click receipt of non-chemical items
- Outstanding Amount editing and alert for partial receipts

Storeroom Request Fulfillment

ERM's storeroom request capabilities get a new look and feel with ERM 9.3, with a helpful new feature for users responsible for overseeing multiple storerooms:

- ***New*** Storeroom request alert panel: This addition to the home page for authorized users indicates arrival of new requests at any of the storerooms on "my sites" and allows quick navigation to fulfillment
- Search for items awaiting fulfillment in any storeroom; select items to print pick list, fulfill, print delivery report, close/cancel, or set to new
- Optionally scan containers to confirm fulfillment

- Substitute a container, including containers in other storerooms
- New search/investigation function for closed storeroom requests
- Fulfillment notifications integrated with new ERM 9 notifications framework

Container Search

The “Lab Inventory” search function in ERM 9.2 is replaced with a new and more powerful Container Search function:

- Choose simple or advanced search
- Return large search results and export the result set
- Sort the result set by multiple columns
- Import or paste lists of containers
- Perform container transactions (see Container Transactions, below) on all or selected containers in the result set
- ***New*** Background execution of large-scale container transactions frees the user quickly to perform other tasks

Container Transactions

ERM’s powerful suite of operations on containers gets a new look in ERM 9.3, along with functional and ease-of-use improvements:

- **Container Information:** Edit / Replicate / Reprint Bar Code
- **Transfer:** To Owner (with or without changing location) / To Location (with or without changing owner) / Put In Transit
- **Disposal:** - Dispose / Dispose Empty / Restore from Dispose
- **Assignments:** Assign to Project / Assign to Owner / Remove Assignments
- **Container Quantity:** Set Amount / Plus-Minus Amount / Change Unit
- **Error Correction:** Change Substance / Delete

New Storage Compatibility

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

- **Assign Storage Codes to Locations:** At any level from site down to sub-location, you can assign storage codes that are inherited by successive child locations, until you indicate otherwise
- Easily view and quickly navigate to locations in the hierarchy that have direct storage code assignments, and edit assignments as needed
- Prevent requestors from selecting incompatible deliver-to locations for requested containers
- Report (scheduled or ad hoc) on containers that are currently in incompatible storage locations

Improved Container Rules

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

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

Other Functional Improvements

- Functions that were previously limited to selecting from “preferred locations” now allow the user to choose locations generally
- On shopping cart checkout, option to choose a different cost center and / or deliver-to location at the item level
- Request item attachments can be viewed from more functions
- User documentation is now available as online help

Security, Integration, and Administration

- All of ERM's existing SOAP web services are now supported as RESTful services
- ERM notifications (email and in-application) can now include report *attachments* that provide supporting detail
- New logging capabilities enhance the information available to support