SciQuest Enterprise Reagent Manager

Release Notes 7.0.2

Internal/External Use

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Software Release Date: April 12, 2013

Prepared For
Internal/External Use

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April 12, 2013

TABLE OF CONTENTS

Revision History

Revision	Date	Author	Changes
1.0	April 12, 2013	ERM Product Group	Creation for v 7.0.2

1 OVERVIEW

This document lists enhancements and modifications for Enterprise Reagent Manager (ERM) 7.0.2. The baseline for comparison is ERM 7.0.1. Please note the following:

- People Administration and related functionality previously found in the ERM Administration module has been migrated to the core ERM application and has been removed from the ERM Administration module.

- This release marks the retirement of the Bar Code Administration module for configuration of the Bar Code Service, which supports communications with networked scanners. Configuration and administration of the Bar Code Service has been migrated to the core ERM application.

1.1 Summary of Major Enhancements/Changes

This section summarizes the *major* functional enhancements for ERM 7.0.2. Complete details of the major enhancements, as well as a comprehensive list of *all* enhancements found in ERM 7.0.2, are given in later sections.

Function	Summary Description
People Administration	The people administration function and auxiliary functions (such as manage roles and manage cost centers) have been migrated from the Windows Application ERM System Administration Module to the browser based client. The people administration function has been significantly enhanced during the migration process.
Report Writer	Reports can now be scheduled to run every [n] minutes during the day. Previously, reports could only be scheduled to run once a day.
Mac Support	ERM will now run on Apple Macs running OS X Lion or Mountain Lion.
Multi Business Units (MBU)	For ERM installations integrated with a Multi-Business-Unit (MBU) configuration of SciQuest Spend Director, ERM can now return business-unit-specific search results based on the user performing the search.
Stockroom Manager	Stockroom Manager has been enhanced so users can correct invalid Spend Director SKU mappings. A new report has been added to ERM to identify stock master items requiring SKU correction.
New Reports	Two reports have been added to track container quantity usage. One report shows usage at the user level and one shows usage at the location level. Two reports have been added to facilitate management of MSDS documents in ERM. • One report is an activity report that shows new materials and new suppliers for existing materials as of a given date which may require an MSDS document. • The other report is an exception report that shows existing materials, or suppliers of materials, that are not currently covered by an MSDS document saved in ERM.
Bar Code Administration	The bar code administration function has been migrated from the Windows Application Bar Code Administration module to the browser-based client.
Workstation Configuration	The nativeClipboardHelper.dll is no longer required to be installed on client workstations in order to copy and paste structures in ERM.

1.2 Upgrade Process

To upgrade ERM to 7.0.2, along with reading this document, please read the following documents which are included in your ERM distribution:

ERM 7.0.2 Installation Guide

ERM 7.0.2 Upgrade Guide

ERM 7.0.2 Windows Application Support Modules Installation Guide

1.3 Related Documentation

The following documents also contain information related to this release of ERM and are included in your ERM distribution:

ERM 7.0.2 Advanced Catalog Interface Oracle API

ERM 7.0.2 Data Dictionary

ERM 7.0.2 Database API Usage Guides (various)

ERM 7.0.2 Hand Held Computer Inventory Software

ERM 7.0.2 Hand Held Computer Inventory Software Installation

ERM 7.0.2 Hand Held Computer Stockroom Inventory Software

ERM 7.0.2 Hardware Software Requirements

ERM 7.0.2 Installation Guide

ERM 7.0.2 Report Writer User Guide

ERM 7.0.2 Rules Engine Configuration

ERM 7.0.2 Upgrade Guide

ERM 7.0.2 Web Services

ERM 7.0.2 Web Service Catalog Interface (WSCI)

ERM 7.0.2 Windows Application Support Modules Installation Guide

ERM Configure IIS to Serve ERD

ERM Networked Scanner Specification

ERM Schema Name Password

ERM Structure Drawer Link Tutorial

SciQuest Enterprise Application Print Service

2 INFRASTRUCTURE CHANGES

The following table lists the infrastructure changes for ERM 7.0.2

Function	Summary Description
Apple Mac Support	ERM will now run on Apple Macs running OS X Lion or Mountain Lion using the Firefox browser. The Safari browser is not supported. Note that ERM on the Mac does not support integration with a lab balance. Please read the "ERM 7.0.2 Hardware/Software Requirements" document for more information.
Browsers	ERM is now supported on the Chrome browser. Please read the "ERM 7.0.2 Hardware/Software Requirements" document for more information.
Copy/paste chemical structures	As of this release, the NativeClipboardHelper.dll file is no longer required to be installed on workstations in order to copy and paste chemical structures within ERM.
Java	ERM now supports Java 7 Java Runtime Environment (JRE) (most current release) on the client workstation. Java 6 continues to be supported.

3 Bar Code Administration

Bar Code Administration only applies to those clients running the Bar Code Service. The Bar Code Service allows network scanners connected over the intranet via serial server devices to perform container operations. Bar Code Administration allows a system administrator to manage the serial server devices in terms of how the devices interact with ERM. Bar Code Administration does ***NOT*** *apply to keyboard wedge scanners or docking scanners.*

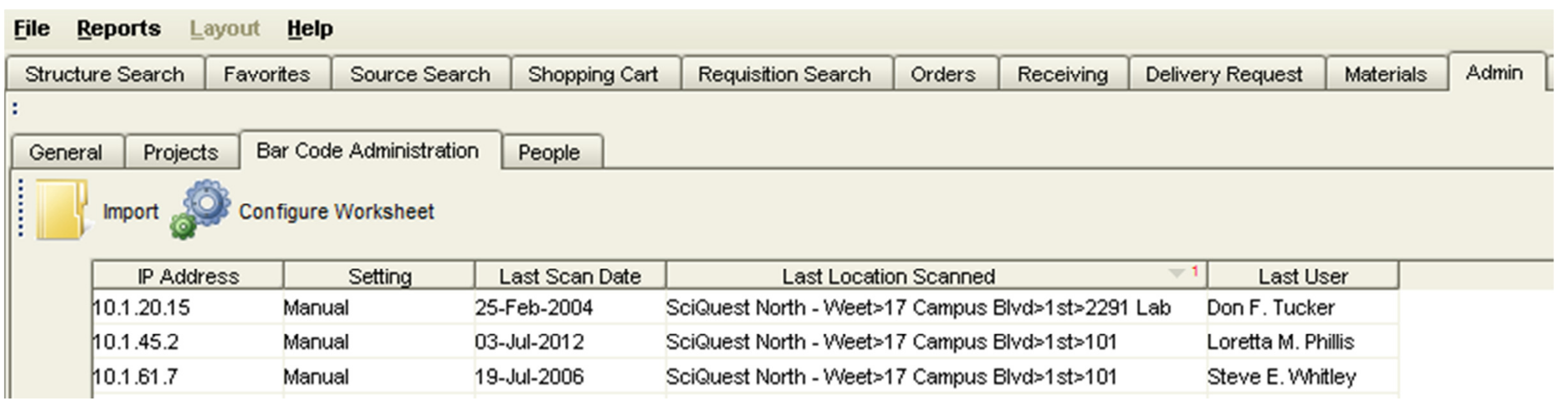
The Bar Code Administration module has been retired, and its functionality has been migrated to the browser-based client. The Bar Code Administration module had two main functional areas:

1) configuration of scanner IP addresses and bar code worksheet and
2) viewing and processing of transaction errors

The configuration of scanner settings and bar code worksheet functionality has been ported to the Bar Code Administration tab, while the viewing of errors is now handled via a report.

3.1 Configuration of Scanner IP Addresses and Bar Code Worksheet

The configuration of scanner settings and bar code worksheet functionality is found on the new Bar Code Administration sub-tab located under the Admin tab (pictured below). In previous versions, users with the "Bar Code Monitor" permission could log into the Bar Code Administration module. This permission has been renamed "Display Bar Code Administration Tab" and any user who could previously access the Bar Code Administration module will be able to access the Bar Code Administration tab.



The grid on the Bar Code Administration tab is configurable like other grids throughout ERM: the columns can be moved, resized, renamed, and made invisible. The columns are as follows:

Column Name	Description
IP Address	IP address of the serial server
Setting	Setting can be one of the following: • Manual • Auto Check-In • Auto Check-Out
Last Scan Date	Date which an ERM scan transaction last occurred via the scanner.
Last Location Scanned	Location last scanned.
Last User	User last scanned.

The right-click menu for the grid is similar to other ERM grids and supports export and copy and also has the following functions:

Menu Item	Function Description
Add IP Address	Allows the user to add an IP address by specifying the IP address as well as the setting (Manual, Auto Check-In and Auto Check-Out).
Delete IP Address	Removes an IP address.
Edit IP Address	Modify the IP address.
Change Setting	Change setting of the IP address. This function can act on multiple rows. All other functions work on a single row.

There are two functions on the toolbar:

- Import — This function will allow a user to import a text file of IP addresses. The file should only contain IP addresses and not scanner settings; when loaded the IP addresses will have their scanner settings set to "Manual".
- Configuration Worksheet — This function allows the administrator to determine what container functions are available to be displayed on the bar code worksheet.

3.2 Viewing Transaction Errors

The user can view transaction errors via a new report – the "Bar Code Service Transaction Errors Report", found under the "Reports | Activity Reports" sub-menu. The report should be generated in CSV format and it has the following criteria:

Site	Site or sites at which the transaction was generated.
Date Range	Date which the transaction occurred.

The report has the following columns. If an unknown value was scanned for a given column, the value will be displayed appended by "(Unknown)". Example: If an unknown user ID was scanned, the user ID is displayed appended by "(Unknown)" such as "616 (Unknown)".

Column	Description
Scanned User	Scanned user in format "Last Name, First Name". The value may also be "AUTO", which is a valid value.
User E-Mail	E-mail of scanned user. This field is blank if unknown user.
Scanned Location	Scanned location down to room. Format is "Site>Building>Floor>Room". The value may also be "AUTO", which is a valid value.
Scanned Sublocation	Scanned location down to sublocation. Format is Site>Building>Floor>Room>Sublocation…>Sublocation". Note that if the user has not scanned a sublocation for a given transaction, the sublocation column will be populated with "Unknown".
Scanned Function	Scanned function.
Scanned Bar Code	Scanned bar code.
Bar Code Owner	Name of the owner of container. Format is "Last Name, First Name". This field is blank if unknown container.
Owner E-Mail	E-mail address of owner of container. This field is blank if unknown container or user has no e-mail.
Header Message	Message from the header transaction. One transaction may be composed of many containers – for example when a user transfers N containers at once. This message comes from the ERM BCStatusCode table.
Container Message	Message that pertains to the particular container in the transaction. Note that for a given transaction, if some containers were processed successfully and some containers generated errors, all containers will be displayed in the report. These messages come from the ERM BCContainerStatusCode table.
Date Time	In format of dd-mon-yyyy hh:mi (where hh is given in 24 hour format)
Transaction ID	The ID in the BCTransaction table for the given transaction.

Processing Errors

In the Bar Code Administration module, the capability existed to manually correct errors and reprocess transactions. These capabilities are no longer supported. However, the Bar Code Service Transaction Errors Report provides the e-mail address of the scanned user as well as the e-mail address of the container owners. The administrator can contact the user/owner and alert them of the situation, at which point the user/owner can perform an operation on the container via ERM to correct the situation which caused the error.

4 People Administration

People search/maintenance and associated functions have been migrated from the ERM Administration desktop module to the core ERM application. This migration is part of the ongoing retirement of the ERM desktop modules; however, in the case of People Administration, the ERM capabilities have been significantly enhanced to better support distributed people administration. In migration, individual functions have been enhanced. The functionality that has been migrated is:

- Search for People
- Create/Edit People
- Manage Cost Center Groups and Cost Centers
- Manage Organizations
- Manage Roles
- Manage List Controlled Rooms

To support the new People Administration functionality, new permissions have been created. The new permission "Display People Administration" allows the user to access the People tab from which all new people functionality is accessed. Besides this new permission, there are other permissions that control people functionality. The names of all these new permissions begin with "People Administration".   During the upgrade process, any user that currently has the "System Administrator" permission (via roles) will be granted the "Display People Administration" permission and all "People Administration" permissions. These permissions are detailed in subsequent sections.

4.1 General People Administration Changes

The ERM Administration module was originally designed around the assumption of a central administrator managing user information. ERM 7.0.2 is designed to allow a portion of this responsibility to be distributed to labs. In this context, ERM now offers more capabilities to simplify and streamline changes, and also much more precise control over what "people" information a particular user can access and modify.

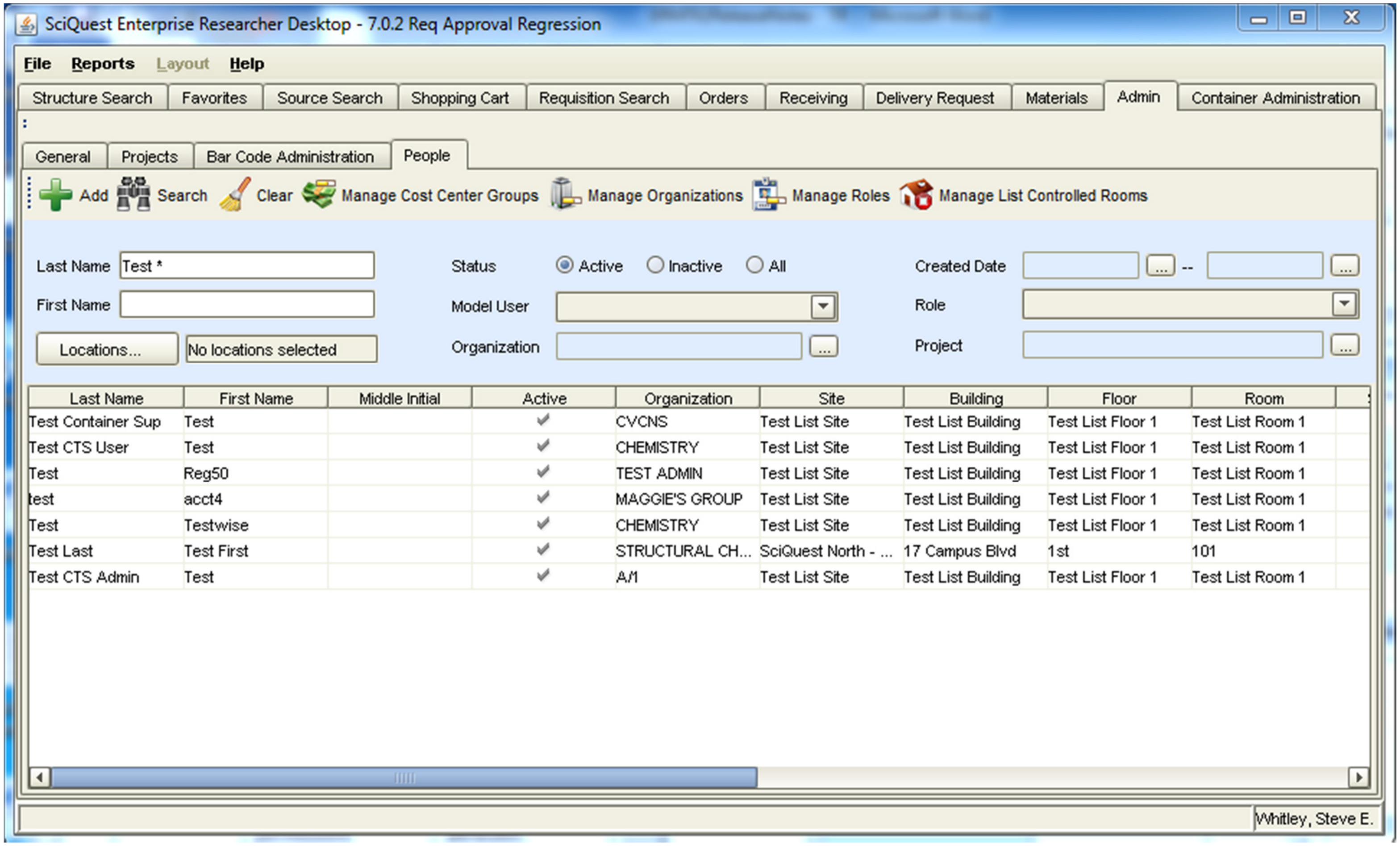
The following table summarizes major changes and enhancements with regards to people administration functions.

Function	Notes
People Search	A significantly enhanced capability is available to search for users, including search by role, project, location and organization.
Search and View permissions	User can now be permitted to search for people and view people attributes WITHOUT also having the ability to edit people attributes.
Bulk Update	Multiple users can be updated at once. For example, a role can be assigned to multiple users at once as opposed to one at a time.
Copy User	A new user can now be created simply by copying an existing user.
Rules Engine	A rules engine has now been incorporated, allowing granular control of which user attributes a given user may edit. For example, a given user may be allowed to change other users' e-mail addresses, but may be prohibited from changing the roles to which the users are assigned.

The following sections describe the People Administration capabilities in detail.

4.2 People Search

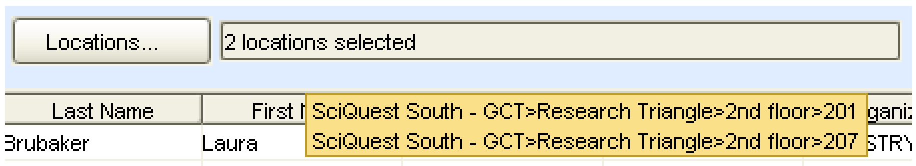
The **People Search window** is located on the People sub-tab of the Admin tab (pictured below). Any user who has access to the People sub-tab can search for people. The People sub-tab requires the "Display People Administration" permission.



4.2.1 People Search Criteria

The following search criteria are supported. All criteria are "Anded" together.

Criteria	Notes
Last Name	The wild card character "*" is supported.
First Name	The wild card character "*" is supported.
Status	Any users with the selected status will be returned in the search results.
Model User	Any user assigned to the selected model user will be returned. (Model users are designated via the "Model User" check box on the Person window, while users are assigned model users via the "Based on User" widget). Example: assume two model users "Chemist Model User", and "EHS Model User", and assume that "User 1", "User 2", and "User 3" have a model user of "Chemist Model User", and that "User 4" and "User 5" have a model user of "EHS Model User". If the user selects "EHS Model User" as a search criterion , then "User 4" and "User 5" will be returned.
Organization	When this criterion is selected, any user belonging to the organization or a sub-organization within the selected organization will be returned. Example: assume an organization of "Division 1>Department 1" and "Division 1>"Department 2". If "Division 1" is selected, any users assigned to "Division 1", "Department 1", or "Department 2" will be returned. If "Department 2" is selected, only users assigned to "Department 2" will be returned.
Created Date	Date on which the user was created. This is a date range, so the user may specify the begin date, end date or both the begin and end date.
Project	Any users that are assigned to the selected project will be returned in the search results. This drop-down will only appear if the system is configured for projects.
Role	Any users that are assigned the selected role will be returned in the search results.

Criteria	Notes
Locations	Any user whose primary location is within the selected location will be returned (but see notes section below). Any location from site down to sublocation may be selected. Example: Assume the following location structure: Site 1 > Bldg 1 > Floor 1 > Room1 , Room 2, and Room 3 Site 1 > Bldg 1 > Floor 2 > Room 4, Room 5, and Room 6 Site 2 > Bldg 1 > Floor 1 > Room 7 If "Site 1" is selected, then any user that has a primary location of Room1, Room 2, Room 3, Room 4, Room 5, or Room 6 will be returned in the search. If "Site 1 > Bldg 1 > Floor2" is selected, then any user that has a primary location of Room 4, Room 5, and Room 6 will be returned. Multiple locations may be selected via the location widget. Example: given the above location structure, the user could select "Room 1" and "Room 4" – any user that had a primary location of either "Room 1" or "Room 4" will be returned. When multiple locations are selected, placing the mouse pointer over the location text box will display all selected locations – as shown immediately below.  The user may also pick a location of "None" which means to search for users that do NOT have a primary location assigned. Notes: • When selecting multiple locations, all locations must be at the same level – such as all rooms, all floors, all buildings, or all sites. • The locations displayed in the location selector widget are based on the user's "Search My sites/Search All sites" preference (found in "File | Preference"). If the user's preference is set to "Search my sites", only the user's sites will be displayed in the location widget. If the user's preference is set to "Search all sites", all sites will be displayed in the location widget • If a user selects a sublocation, only the selected sublocation will be searched – sublocations underneath the selected sublocation will not be searched. Example: assume a location structure of "Room 1>Cabinet 1>Shelf 1". If the user searches "Cabinet 1", only users who have a primary location of "Room 1>Cabinet 1" will be returned. Users that have a primary location or "Room 1>Cabinet 1>Shelf 1" will not be returned. • If a location is not explicitly selected, all search results are governed by the "Search My Sites/Search All Sites" preference (set via the "File | Preference" window). If the preference is set to "Search My Sites", then only the sites associated to the user performing the search will be searched, all other sites will be ignored. If the preference is set to "Search All Sites", then all sites will be searched. Example: assume "Sites 1", "Sites 2", and "Sites 3" exist, and the logged in user is associated to "Site 2", and the user's preference is set to "Search My Sites". If the user then performs a search for all "Active" users, only active users whose primary location is at "Site 2" will be returned.

4.2.2 People Search Results

The People search result grid is similar to other ERM grids and supports sorting, export, copy, column configuration, etc. Columns in the result set are described in the table below:

Field	Description
Name	Separate columns for Last Name, First Name and Middle Initial.
Active	When checked with icon (not a checkbox as you cannot edit this field in the grid), indicates whether the user is active (checked) or inactive (not checked).
E-mail address / phone number	Contact Information.
Creator / Created Date	User who created this person and date that this person was created.
Last Modified date / Last Modified By	User who performed last edit and date that this person was created.
Organization	Organization to which the user belongs. If there is an organization hierarchy, only the organization to which the user is assigned is displayed, not the full hierarchy. Example: assume the user is assigned to organization "Department 1" in the hierarchy of "Division 1>Department 1" – in the search results only "Department 1" is displayed.
Primary Location	Separate columns for Site, Building, Floor, Room and Sublocation.
Is Model User	A check in this column indicates this person is designated as a Model User from whom other users may inherit configuration details.

4.3 People Search Right-Click Menu Functions

The search result grid has a floating menu which allows the user to take action on a selection of people in the result set. Floating menu functions are described in the table below.

All functions, except Copy User, Edit User, Reset Password, and Manage eCommerce/Vendor Codes, can be performed on multiple selected users at the same time. Example: logged in user can select multiple people, and then assign all the selected people the same role.

Each floating menu function has a corresponding permission with a name beginning "People Administration Menu Item…". The user must be assigned that permission in order for the menu function to be displayed. As noted before, during the upgrade process, any user that currently has the "System Administrator" permission (via roles) will be granted all "People Administration…" permissions.

The following table describes each floating menu function as well as the permission needed to display the floating menu function. Unless otherwise noted, all functions are governed by the "People Operations Rules Engine". Please read the "People Operations Rules Engine" section for details.

Field	Description
Copy User	This function allows the logged in user to create a new person by copying attributes from the currently selected person. Please read the "Person Window" section for details. This function is not governed by the rules engine. Permission: People Administration Menu Item Copy User
Edit User	Opens the Person form displaying the values for the selected person. Please read the "Person Window" section for more information. Permission: People Administration Menu Item Edit User
Advanced People Operations	This option will appear if at least one of the sub-menu item permissions are granted to the user.
Assign a Role	Opens the "Assign a Role" pop-up to allow the logged in user to assign a single Role to selected person(s). The roles that appear in the pop up are based on the following two permissions: People Administration Menu Item Assign a Role/ Grant Any Roles – if the logged in user has this permission , all roles will appear in the pop up People Administration Menu Item Assign a Role/ Grant My Roles – if the logged in user has this permission, only roles to which the logged in user are assigned will appear in the pop-up. The user must have one of the above permissions to display the menu function.
Assign Cost Center Groups	Opens the "Assign Cost Center Group" pop-up to allow the logged in user to assign a single Cost Center Group to selected person(s). Permission: People Administration Menu Item Assign Cost Center Groups

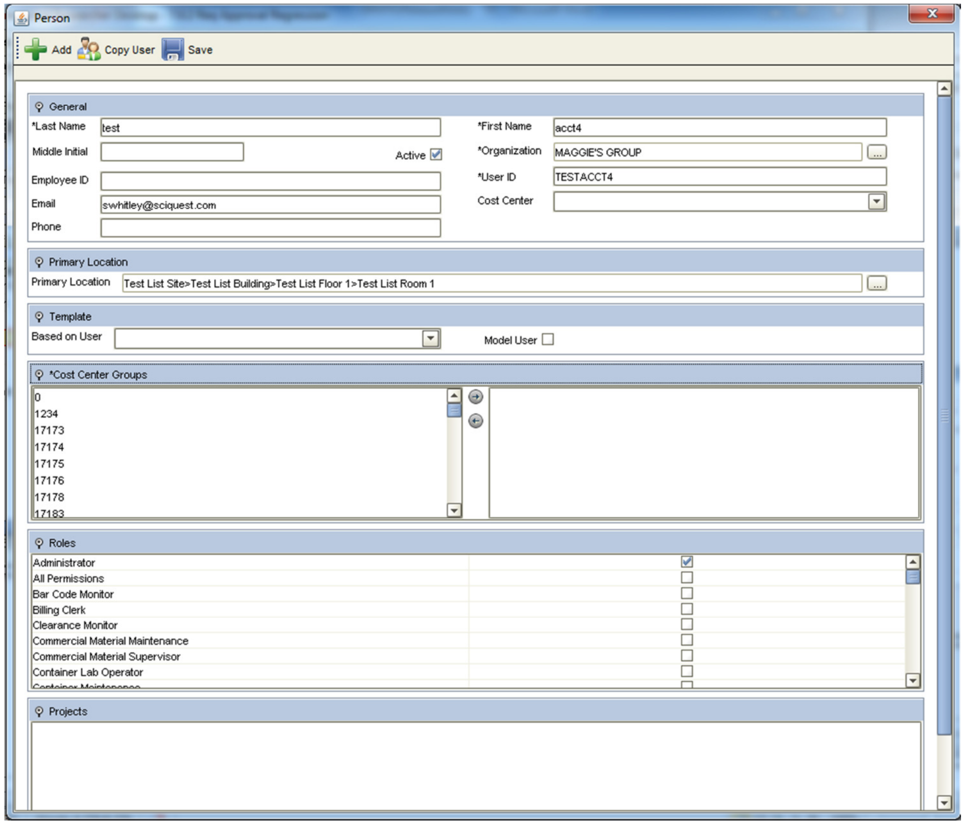
Field	Description
Assign List Controlled Room	Opens the "Assign People to a List Controlled Room" pop-up to allow the logged in user to assign the selected person(s) to a room designated as a List Controlled room. The rooms that appear in the pop up are based on the following two permissions: People Administration Menu Item Assign List Cntrl Rooms Icon/Grant Access to Any List Cntrl Rooms If the logged in user has the above permission, then the pop up will display all list controlled rooms. People Administration Menu Item Assign List Cntrl Rooms Icon/Grant Access to My List Cntrl Room If the logged in user has the above permission, then the pop-up will display only list controlled rooms to which the logged in user is assigned. The list controlled rooms that are displayed are determined by the above permissions, as well as the logged in user's "Search My Sites/Search All Sites" preference. If the logged in user's preference is set to "Search My Sites", only list controlled rooms at the user's sites are displayed. If the preference is set to "Search All Sites", list controlled rooms at all sites are displayed. The user must have one of the above permissions to display the menu function.
Assign Primary Location	Opens the "Select Locations" pop-up to allow the logged in user to assign a single location/sublocation to selected person(s). The locations that are displayed in the pop-up are based on the logged in user's "Search My Sites/Search All Sites" preference. Permission: People Administration Menu Item Assign Primary Location
Assign Organization	Opens the "Assign an Organization" pop-up to allow the logged in user to assign a single organization to selected person(s). Permission: People Administration Menu Item Assign Organization
Change Status	Opens the "Change User Status" pop-up to allow the logged in user to change the status of the selected person(s). When a user is inactive, their name will only be visible in the name pop-ups used as a search criterion. The user's name will NOT be visible in pop-ups used to create new data (e.g. being selected as a recipient). Permission: People Administration Menu Item Change Status
Reset Password	Opens the Password dialog which will allow the user to reset the password for the selected person. Permission: People Administration Menu Item Reset User Password
Manage eCommerce/Vendor Codes	Please read the "Manage eCommerce/Vendor Codes Window" for detailed information. This function is NOT governed by the rules engine. Permission: People Administration Menu Item Manage eCommerce/Vendor Codes

4.4 Person Window

The **Person window** is used to Add, Copy or Edit a person. This window may be accessed in one of three ways:

Access From	Permission Required
Add Button Add from the tool bar menu on the People Tab	"People Administration Display Add User Icon"
"Edit User" Floating Menu Function	"People Administration Menu Item Edit User"
"Copy User" Floating Menu Function	"People Administration Menu Item Copy User"

The sections of this window expand or collapse by clicking the icon at the left side of the title bar. ERM retains the user's last display settings the next time the window is opened. Sections include:



- **General**: Name, Contact Information, Organization and Cost Center.
- **Primary Location**: Primary assigned room or sublocation (select from location tree).
- **Template**: Designate this user as a Model User, or select a Model User to base the user on.
- **Cost Center Groups**: Select one or more cost center groups from which this user can select cost centers for requests.
- **Roles**: Select one or more roles for which this user is authorized. Please read notes section below for more information.
- **Projects:** Displays projects to which this user is assigned. This is always a display only section; assigning of a person to projects is done via the "Projects" tab (located under the Admin tab). Note: if the installation is not configured for Projects, then this section will not be visible.

Notes on Add/Edit/Copy

Copy User

This function may be selected from either the floating menu or the Person Window, and allows the logged in user to create a new person by copying attributes from the currently selected person (either the selected person on the Person search results or the person currently in the Person window).

When the logged in user selects "Copy User" from the floating menu from the "Person Window", the Person Window is opened/cleared and the following fields are populated from the selected person.

- Location
- Status
- Cost Center
- Organization
- Projects
- Cost Center Groups
- Associated Locations - this includes both List Controlled Rooms and Preferred Delivery Locations. While these locations are not displayed in the Person window they are copied from the selected person.
- Model User Status
- Roles – the roles that are displayed and/or copied affected by permission constraints. Please read the "Assign A Role" description in the floating menu section for more information.

The name, e-mail, phone, user ID and employee id fields are blanked out, and must be entered.

Edit

Editable fields on this window are determined via the rules engine. A user may be authorized to modify data for some people, while not allowed to modify data for other people. For example a user may be able to change the phone number for some users, but not change phone number for other users. Please read the "People Operations Rules Engine" section for details.

Roles

When adding/editing/copying, the roles that are displayed and that may be selected are based on the following two permissions:

People Administration Menu Item Assign a Role/ Grant Any Roles – if the logged in user has this permission , all roles will appear
People Administration Menu Item Assign a Role/ Grant My Roles – if the logged in user has this permission, only roles to which the logged in user is assigned will appear

Password

When creating a new user via add/copy, the user is automatically assigned the password "welcome". This password then may be changed via the "Reset Password" floating menu function, or by the new user when they log into the system via the "File | Change Password" function.
Note that if ERM is integrated with Windows/LDAP Authentication or integrated with Punchout, the password saved in the ERM database is NOT used to access ERM.

4.5 People Operation Rules Engine

The people operations rules engine is a Microsoft Excel file called PeopleOperationRules.xls that controls what operations may be performed on a person via the floating menu functions, and what fields may be edited in the "Person Window". The rules engine operates in the same manner and is configured/deployed in the same manner as the Container and Requisition Item Edit Rules Engines. Please read the "ERM702RulesEngineConfiguration" document for details on configuring/deploying rules engines.

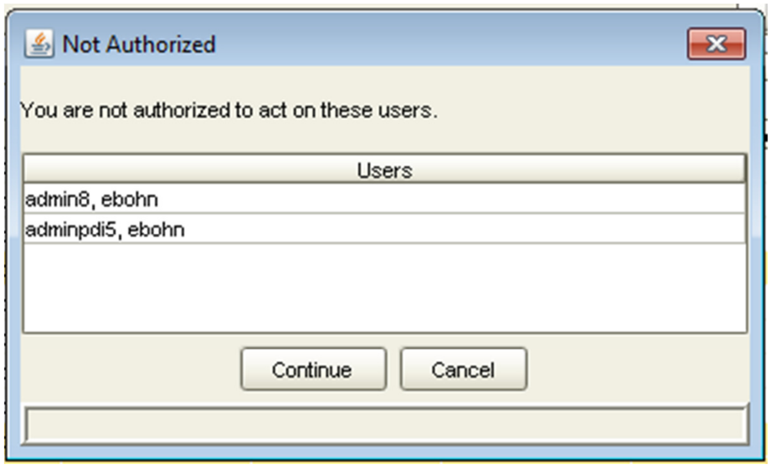
The default rules engine that comes shipped with ERM allows the following:

Logged in User Has Permission	Description
People Administration Create/Edit All People permission	The logged in user can perform any floating menu function on any user. Can edit all fields in Person Windows for any user.
People Administration Create/Edit People in my organization permission	The logged in user can perform floating menu functions only on people that are in the same organization as the logged in in user. Can edit all fields in Person Window for any person that is in the same organization as the logged in user.

During the upgrade process, any user that currently has the "System Administrator" permission (via roles) will be granted all "People Administration…" permissions.

People Administration Right-Click Menu Functions

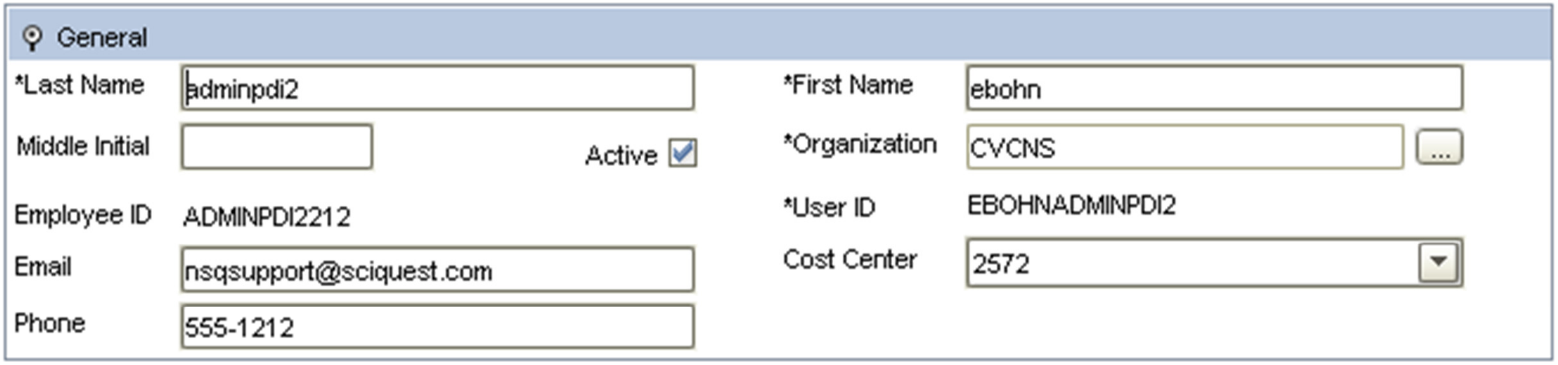
When a logged in user attempts to perform a function on users that is prohibited by the rules engine, they will receive a pop-up error box, such as



The logged in user can click “Continue” to proceed with the operation on people that they are allowed to change, or click “Cancel” and cancel the operation altogether. Example: the logged in user selects   users “A”, “B”, “C”, “D”, and “E” from the people result set, and then attempts to assign them a new role. The rules engine prohibits the logged in user for assigning a new role for people “A” and “B”, but allows the logged in user to assign a new role for users “C”, “D”, and “E”. The logged in user will get the “Not Authorized” dialog listing people “A” and “B”. If the logged in user clicks “Continue”, they will get the “Assign Role” dialog box, from which they can pick a role to assign to people “C”, “D”, and “E”.

Person Edit

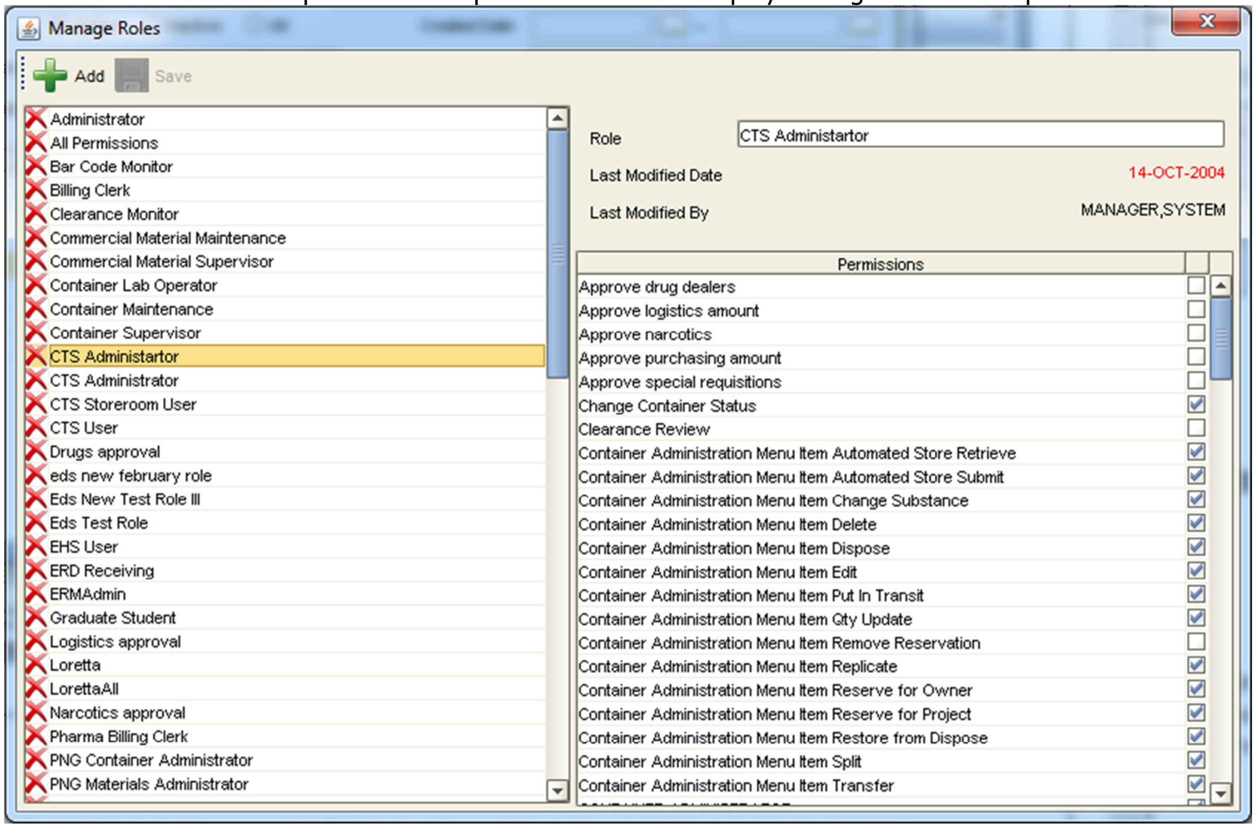
If the rules engine prohibits the user from editing certain fields in the Person Window, the fields and values will be displayed as read only and cannot be edited. The picture below shows the person window when the rules engine allows the user to edit all fields but the Employee ID and User ID:



4.6 Manage Roles and Assign Roles

The Manage Roles window is accessed by clicking the "Manage Roles" toolbar icon from the People Search window. Manage Roles allows the user to create new roles and assign permissions to a role.

Access to this window requires the "People Administration Display Manage Roles icon" permission.



Highlighting an existing role displays and permits changes to the permissions associated with this role. A role may be renamed by typing in a new role name in the "Role" text box and clicking "Save".

Clicking the "Add" button allows the user to enter the name of a new role and assign permissions to it.

The "Save" button saves changes to roles.

The icon deletes the role from the system after warning the user of the action.

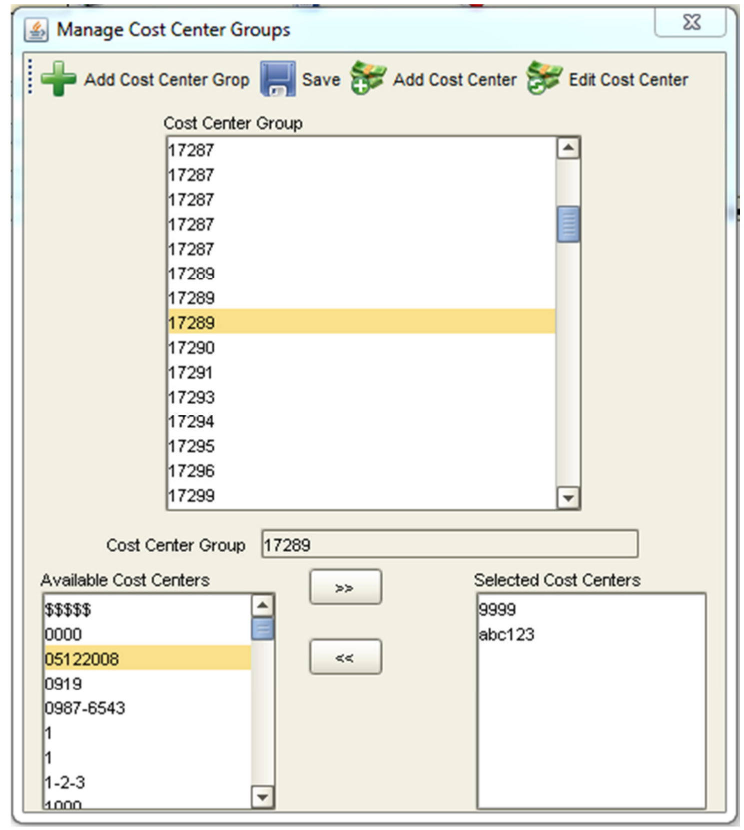
Roles are assigned to a single person via the Person window.

Roles are assigned to many people at a time via the "Assign a Role" right-click menu function on the People Search window. A user can select many people from the search result set and assign a role to all of them at the same time.

4.7 Manage Cost Center Groups and Cost Centers

Cost Center Groups are a mechanism to limit the cost centers that an individual user can access. Cost centers are assigned to cost center groups, and cost center groups are assigned to people. A person is required to be assigned to at least one cost center group, but not necessarily a cost center.

The **Manage Cost Center Groups window** is accessed via a toolbar icon from the People Search window. Access requires the "People Administration Display Manage Cost Center Groups Icon" permission.



The window lists the current cost center groups. Highlighting a cost center group displays the current selected cost centers for that group in the lower right panel. The right/left arrows allow modifying the associated cost centers. The "Save" button saves changes.

The **Add Cost Center Group button** opens a pop-up where a user can enter the name of a new cost center group. Cost Center Group names must be unique. New cost center groups are added to the Cost Center Group list on this window.

The **Add Cost Center button** opens a pop-up where a user can enter the name of a new cost center. Cost Center names must be unique. New cost centers are added to the list of Available Cost Centers.

The **Edit Cost Center button** opens a pop-up where cost centers can be inactivated. To inactivate a cost center, its corresponding check box must be unchecked. Inactive cost centers will still appear in historical information but cannot be used for any new requests.

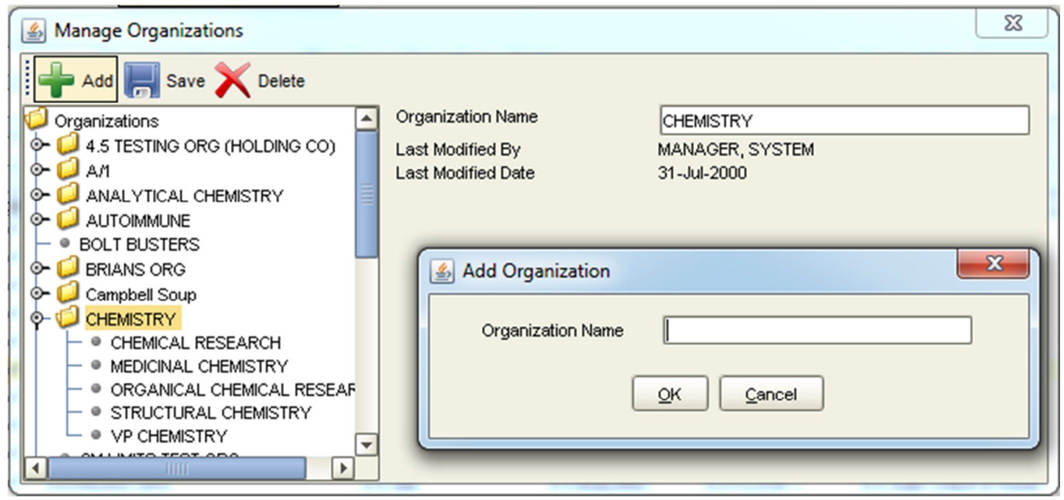
Cost Center Groups and the default Cost Center can be assigned to People individually on the Person window. Users can select their default cost center in User Preferences, accessed via the "File | User Preferences" menu option. Users can also select any cost center in their assigned groups when submitting a request for an item.

Multiple users can be assigned to one Cost Center Group via the "Advanced People Operations | Assign Cost Center Groups" floating menu function on the People Search window.

4.8 Manage Organizations / Assign Organization

The **Manage Organizations window** allows the user to maintain the organization hierarchy to which People are associated. It is accessed by a toolbar icon on the People Search window. Access requires the "People Administration Display Manage Organizations Icon" permission.

Organization hierarchy is displayed in a tree view which is expanded or collapsed by clicking the icons to the left of parent organizations (displayed as folders).



Clicking the "Add" icon opens the Add Organization window. If an organization is highlighted, the new organization is saved as child of the highlighted one. Organization names do not have to be unique.

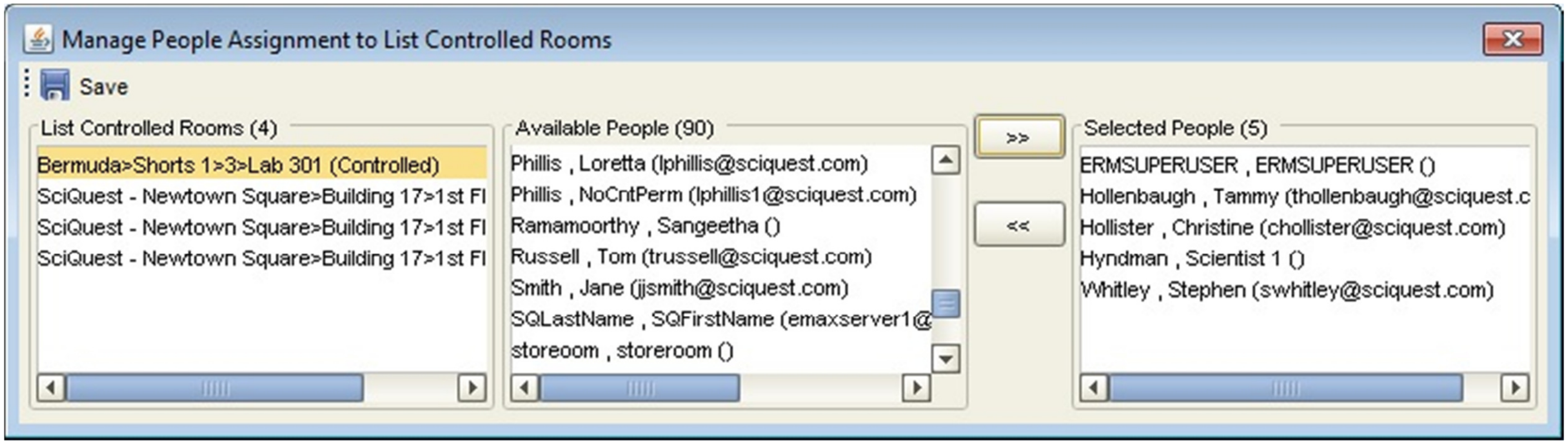
Clicking the "Delete" icon will check if that Organization is assigned to a user. If it is not assigned to a user, the organization will be deleted.

An organization can be assigned to one user at a time via the Person window. A person must be assigned to an organization.

An organization can be assigned to many people at a time via the "Assign Organization" right-click menu function on the People Search window. A user can select many people from the search result set and assign an organization to all of them at the same time.

4.9 Manage List Controlled Rooms

The **Manage People Assignment to List Controlled Rooms window** allows the user to associate or disassociate users to List Controlled Rooms. It is accessible based on the permissions "People Administration Menu Item Assign List Cntrl Rooms Icon/Grant Access to **Any** List Cntrl Room" or "People Administration Menu Item Assign List Cntrl Rooms Icon/Grant Access to **My** List Cntrl Rooms".



The left-most panel displays the List Controlled Rooms associated to the logged in user based on their "Display All Sites…" / "Display My Sites…" preference. If the user has the "People Administration Menu Item Assign List Cntrl Rooms Icon/Grant Access to **Any** List Cntrl Room" permission then **every** List Controlled room (either at "My Site" or "All Sites") is visible. If the user only has the "People Administration Menu Item Assign List Cntrl Rooms Icon/Grant Access to **My** List Cntrl Rooms" permission, then only those List Controlled rooms to which the logged in user is assigned (either at "My Site" or "All Sites") are displayed.

The center panel displays all active users not currently assigned to the highlighted List Controlled room, while the right-most panel shows all users currently assigned to the selected List Controlled Room.

4.10 Manage eCommerce/Vendor Codes

eCommerce Vendor Codes are credentials used to establish connections with external suppliers or catalogs. Examples include supplier product availability calls and also instances when it is necessary for different users to access different SciQuest Hosted Catalogs Product Views. For additional information on the use of eCommerce Vendor Codes in your ERM configuration, please contact SciQuest Customer Support.

5 Enhancements & Modifications

5.1 New Activity Reports: Chemical Usage By User / By Location

Two new reports are available to attribute chemical usage to users or labs. Both of these reports detail quantity adjustments and other transactions reflecting quantity usage to containers over a time period by:

1) the user who performed the transaction
2) the use location of the container when its quantity was changed.

Both reports are available under "Activity Reports" on the Reports menu.

The **Chemical Usage by User report** allows the user to specify a person and/or a date range as criteria. The person specified is the person who performed the transaction. If no person is specified, ALL is assumed. The date range specifies the date on which the quantity adjustment occurred. If no Date Range is specified, all transactions are displayed.

The **Chemical Usage by Location report** allows the user to specify a location or sublocation and/or a date range as criteria. The location specified is the location of the container when quantity adjustment occurred. If no location is specified, ALL is assumed. The date range specifies the date on which the quantity adjustment occurred. If no Date Range is specified, all transactions are displayed. Both reports return the following transaction detail for containers meeting the entered criteria:

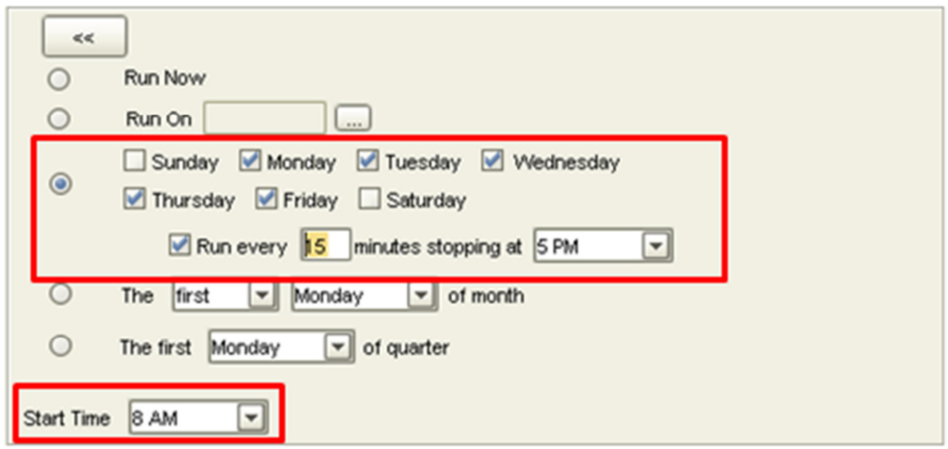
Field	Description / Comments
Bar Code	The bar code of the container. The report is sorted by Bar Code and Action Date.
Change Amount	The quantity adjusted amount.
Change Amount Unit	The quantity adjusted amount unit.
Container Status	The current status of the container.
Label Name	The label name of the container.
CAS No	The primary CAS No (if any) associated to the material in the container.
Changed By	The name of the user who performed the action. Format is "Last Name, First Name".
Owner	The owner of the container. Format is "Last Name, First Name".
Action Date	Date the transaction was performed. Format is dd-mon-yyyy
Room	The "Use" room (i.e. not storage room) the container was in when the action occurred. The format is Site>Building>Floor>Room.
Sublocation	The "Use" sublocation (if any) the container was in when the action occurred.

Each report is grouped by container bar code, with a "Total" adjustment amount for each container following the detail transaction line(s) for the container.

5.2 Other Enhancements and Modifications

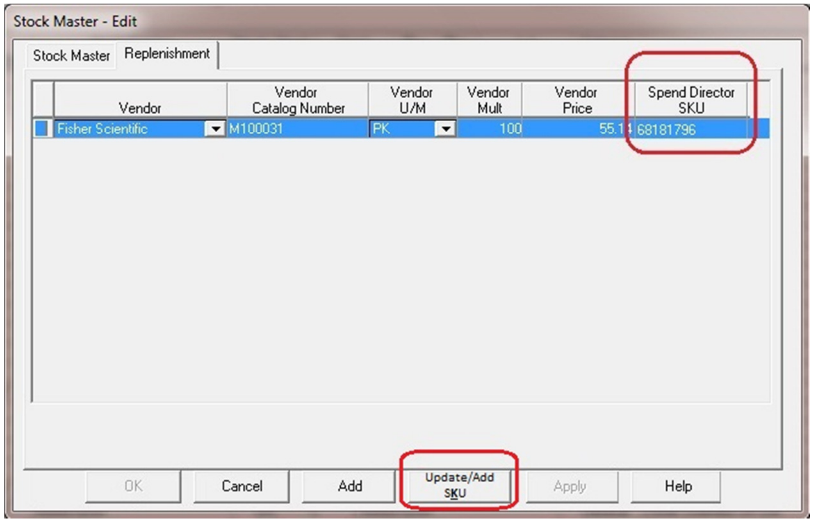
Unless mentioned otherwise, all Enhancements and Modifications are implemented in the ERM browser-based module (formerly known as ERD).

Function	Function Summary	Description Notes
GUI	ERM Client Start Up	The appearance of the HTML page and the Login prompt that appears at the startup of ERM on client workstations have been modified. The changes to the HTML page include deletion of a reference to automatic download of Java. (Java does not download automatically.)
Administration	Tab Permissions	The "Admin" tab is now displayed if the user has any of the following permissions. • "Display General Sub Tab on Admin Tab" – this is a new permission. Users with this permission will be able to view the "General" sub-tab under the "Admin" tab. During the upgrade process, any user that currently has the "System Administrator" permission (via roles) will be granted the "Display General Sub Tab on Admin Tab" permission. (Previously users with the "System Administration" permission could view the "General" sub-tab.) • "Display Bar Code Administration Tab " • "Display People Administration" (this is a new permission) • "Create Projects/Assign Projects to Users" In previous releases the "Admin" tab was displayed if the user had the "System Administration" permission.
Search and Request	eMolecules Integration	eMolecules searching and requesting (requires the optional eMolecules integration module) has been enhanced as follows: • eMolecules can now return the unique SKU ID for items in the eMolecules catalog. This ID uniquely identifies a supplier's specific product configuration for an eMolecules chemical. The SKU IDlshould be passed to purchasing system in place of the Catalog number to better facilitate ordering from eMolecules. • The "Catalog Type" element is now returned in the search results in the "Availability Phrase" column.

Function	Function Summary	Description Notes
Reports	Scheduling	The ERM report scheduling capability has been enhanced to permit scheduling a report to execute multiple times per day. The report interval can be between 5 and 240 minutes (4 hours). Only reports that are scheduled to run on a given day(s) of the week may be scheduled to be run multiple times a day. This feature does not apply to reports that are scheduled to run on a given date, or a given day of the month or quarter. The report starts running at "Start Time" and will run up to, but not including, the end time. If a report is scheduled to run every 5 minutes, starting at 8:30 am and stopping at 9:00 am, the report will run at 8:30, 8:35, 8:40, 8:45, 8:50, and 8:55, but not at 9:00. See defect ERM-12652 about stopping/starting jobs that run every [N] minutes. As in earlier releases of ERM, reports can be configured so that the report output is e-mailed directly to one or more addresses. In the example below, the report is scheduled to run every 15 minutes, weekdays, between 8am and 5pm. 
User Administration	Model User Preference Defaults	Model User configuration can now include default values for the "Use pre-printed bar codes" preference found on the "Container" tab on the "Preferences Window"
System Administration	Sublocation and Employee Labels	Multiple sublocation label types are now supported and can be printed from the Sublocations Administration window. This window previously supported printing only one location label type. Multiple employee label types are now supported and can be printed from the "Employee Scan Sheet and Labels" window. This window previously supported printing only one employee label type. Upgrade Note: please read the "Database Modifications" section for information on how label types will be classified as "Container", "Sublocation" and "Employee" labels during the upgrade.

6 Stockroom Module Enhancements

6.1 Adding or Updating SKUUniqueID for a Stock Master Item



It is now possible to update the Spend Director SKUUniqueID for a Stock Master item. The SKUUniqueID is the unique internal identifier for an item in a SciQuest Hosted Catalog. ERM uses this identifier in Stockroom when replenishing items from stock to update the item price and to determine whether important specifications of the item (e.g. package size, lot quantity) have changed. This feature requires integration between ERM and SciQuest Hosted Catalogs.

For manual entry (via the Stock Master Add/Edit tab), the SKUUniqueID for an item can be found in ERM on the Source Search tab, in the Spend Director search results.

The Stockroom Stock Master Add/Edit window also includes a new "Update/Add SKU" button. This button is only active on the "Replenishment" tab. Clicking this button opens a Spend Director search window, which will search for items using the Stock Master Item replenishment Vendor and Catalog number. If a matching Spend Director item is found, the user may highlight the item and click the OK button to link this Spend Director catalog item to the stock master for this replenishment vendor.

6.2 New Report: "Stockroom Catalog Items - Incorrect SKU"

This new report identifies stock master items whose SKU link to a Spend Director catalog item is no longer valid. This report requires both the optional ERM Stockroom module and the optional ERM SciQuest Hosted Catalog integration module.

This report should only be run as a CSV, as it contains too many columns to be properly viewed as a PDF.

Criteria Section
This report has no criteria. When executed, the report will validate every Stock Master item linked to a Hosted Catalog item.

Report Results

Items that meet any of the following criteria are included on the report:

- The Stockroom Replenishment catalog number matches the Spend Director Catalog Number but the Stockroom Replenishment Spend Director SKUUniqueID does not match the Spend Director SKUUniqueID.
- The Stockroom Replenishment catalog number matches the Spend Director Catalog Number but the Spend Director Supplier ID recorded in ERM for this supplier does not match Spend Director's supplier ID.
- The Stockroom Replenishment SKUUniqueID matches a Spend Director SKUUniqueID, but that item's catalog number does not match the Stockroom Replenishment catalog number.
- The Stockroom Replenishment catalog number does not match any Spend Director Catalog Numbers.

In the above, references to Spend Director Catalog Number mean either the Spend Director Catalog Number or Manufacturer Part Number. The report has the following columns:

Field	Description
ERM Catalog Number	The ERM Replenishment Catalog Number.
SpD Catalog Number	The Supplier's catalog number in the SciQuest Hosted Catalogs (Blank if not found).
SpD Manufacturer Number	Manufacturer's part number for this product in the SciQuest Hosted Catalogs (Blank if not found).
Stock Room SKU	The SKUUniqueID value currently associated with the stock master replenishment item in ERM.
Spend Director SKU	The SKUUniqueID value associated with the matching item in Spend Director (Blank if not found).
ERM Vendor Name	The replenishment vendor name in ERM.
ERM Vendor ID	The ERM internal ID for the replenishment vendor.
ERM SpD Supplier ID	The value of the Spend Director Supplier ID synonym associated with this ERM vendor.
SpD Supplier ID	Spend Director Supplier Internal Id (Blank if not found).
SpD Supplier Name	Spend Director Supplier Name (Blank if not found).
ERM Description	The ERM stock master item description.

Field	Description
SpD Product Name	Spend Director Product Name (Blank if not found).
Price	Spend Director Unit Price (Blank if not found).
Currency	Currency associated with the Spend Director Unit Price (Blank if not found).
Pkg Qty	Spend Director package size (quantity).
Pkg Units	Spend Director package size unit.
Stk Master ID	ERM internal ID for this stock master item.
Replenishment ID	ERM internal ID for this stock master replenishment item.

6.3 Other Stockroom Changes and Enhancements

Function Summary	Description Notes
Stock Master – Link to Material	If a stock master item has been linked to the wrong material, it is now possible to correct the material association. Previously, the association of a stock master item to a material could be cleared, but the stock master item could never then be matched to a different chemical. In ERM 7.0.2, when the "Chemical" button is clicked for a stock master item, ERM will attempt to match the stock master item to a chemical. When the attempted match is complete: • If one or more candidate matching materials are found, the Material Search window will open with those results for the user to select the correct match, or to designate "no match" and create a new material if needed. • If no candidate matching materials are found, ERM will automatically create the material.
View Material Information	The "Suppress Container Create Flag" is now displayed on the Stockroom View Material window as a checkbox. If this flag is checked, ERM will not create containers for the designated item during receiving.
Stock Master – Search Spend Director	The Spend Director Hosted Catalog search from Stockroom now returns the DUNS number field and is saved when a new supplier is created.
Stock Master – Search Spend Director	Search of Spend Director Hosted Catalogs in a multi-business-unit (MBU) configuration of Spend Director now returns business-unit-specific results based on the logged-in user.

6.4 Enhancements in Data Loader for Stockroom

The Data Loader was enhanced to populate information for use by the Stockroom Manager application. This provides a straightforward solution for loading legacy Stockroom data without the manual data entry requirements of the Stockroom user interface.

The Data Loader will populate the following Stockroom tables:

- StockMasterItem
- StockReplenishment
- StockRoomInventory

The StockMasterItem and StockReplenishment table data is loaded together. The StockRoomInventory table data is loaded separately.

6.5 Changes in ERM System Administration for Stockroom

The "Assign People to Rooms" window in the ERM System Administration Module has been changed to "Assign People to Stockrooms". This window allows users to be assigned to only stockrooms. Therefore when working with the Stockroom module, the System Administration module is necessary to associate users to stockrooms.

7 MSDS Management Module Enhancements

Two new reports have been added to assist with managing MSDS documents saved in the ERM database:

1) New Materials and Suppliers report
2) Materials and Suppliers with No Associated MSDS report

Both reports are found under the "EHS Reports" menu under "Reports"

7.1 New Materials and Suppliers Report

This report details new materials or new suppliers/manufacturers of existing materials that have been recently created through the requisition submit or container creation processes. This report is intended to help a user identify new MSDS documents that may be required. While this report is intended for use with the optional ERM MSDS Management Module, the MSDS Management Module is not required to run this report.

Criteria	Description / Comments
Site	If the Site criteria is specified, the report will return any materials and suppliers/manufacturers in which the site specified matches 1) the site of the delivery room for the requisition item OR 2) the site at which the container was created.
Date	If the date criteria is specified, the report will return any materials and suppliers/manufacturers in which the date specified matches 1) submitted date of the requisition OR 2) the created date of the container

Field	Description / Comments
Date	The date of the transaction that created the new material and supplier/manufacturer.
Material name	The Name of the material associated to the container or requisition item.
CAS number	The primary CAS No (if any) associated to the material
MFCD number	MDL No (if any) associated to the material
Vendor Name	The supplier from whom the container was purchased.
Catalog Number	The supplier's catalog number for the container.
Manufacturer Name	For reseller items, the manufacturer or brand of the container (if applicable/available).
Manufacturer Part Number	The manufacturer's catalog number for this container (if applicable/available).

7.2 Materials and Suppliers with No Associated MSDS Report

This report should only be run if the optional ERM MSDS Management Module has been licensed. The MSDS Management Module allows users to manually attach SDS documents to materials/suppliers/manufacturers via the Material Maintenance window. This report **does not** apply to ERM implementations that are integrated with an external MSDS repository. For new materials or new suppliers/manufacturers of existing materials that have been recently created through the requisition submit or container creation processes, this report displays any material/supplier/manufacturer combination that does not have an attached MSDS document.

Criteria	Description / Comments
Site	If the Site criteria is specified, the report will return any materials and suppliers/manufacturers in which the site specified matches 1) the site of the delivery room for the requisition item OR 2) the site at which the container was created. Either a specific site or "All" must be selected.
Supplier (Vendor)	If a Supplier criterion is specified, the report will return any materials that have associated requisition items or containers from the given supplier but do NOT have an associated MSDS document. Either a specific supplier (vendor) or "All" must be selected.
Manufacturer	If a Manufacturer criterion is specified, the report will return any materials that have associated requisition items or containers from the associated manufacturer but do NOT have an associated MSDS document. If no Manufacturer is specified, "All" is assumed.
Date	If the date criteria is specified, the report will return any materials and suppliers/manufacturers in which the date specified matches 1) submitted date of the requisition OR 2) the created date of the container If no date range is specified, ALL create dates are assumed.

Results Field	Description / Comments
Container create date	The date of the transaction that created the material / container.
Material name	The Name of the material in the container.
CAS number (if available)	The primary CAS number (if any) associated to the material in the container.
MFCD number (if available)	MDL number (if any) associated to the material in the container.
Vendor Name	The supplier from whom the container was purchased.
Catalog Number	The supplier's catalog number for the container.
Manufacturer Name	For reseller items, the manufacturer or brand of the container (if applicable/available).
Manufacturer Part Number	The manufacturer's catalog number for this container (if applicable/available).

8 Fixed Issues

These issues were detected in previous releases of ERM and have been fixed in ERM 7.0.2. They do not include issues rectified in previous patch releases, nor do they include issues detected internally, unless they were judged to be of operational importance. **Unless mentioned otherwise, all issues deal with the ERM browser-based module (formerly known as ERD)**. The Summary of Defect column describes the defect as it occurred in previous releases.

Function	Operation	Summary of Defect	Internal Defect #	Detected in Version
Admin	Model Users	When pushing out changes for a Model User to its associated users, ERM automatically sends an e-mail to the affected users. This e-mail was being sent to both active and inactive users. Now the e-mail will only be sent to active users.	ERM-12447	7.0.1
Admin	Roles and Permissions	In ERM 7.0.1, users with the "Display Requisition Search Tab" permission were also able to log in to the ERM System Administration module, and therefore could make changes to administrative and configuration information. Administrative access is no longer associated with this permission.	ERM-11784	7.0.1
Admin	User Preferences	The "Pre-Printed Bar Codes" setting and "Weigh Scale" options were only able to be set by users with the "Container Maintenance" permission. These preferences can now be set regardless of permission.	ERM-12448	7.0.1
Admin	User Preferences	In ERM 7.0.1, if a user had the preference set to "Search only my sites / Display only my sites in location widgets" but did not have a primary location assigned, that user could not see or select any locations when selecting a default location. This preference is now ignored until a user has a primary location assigned.	ERM-12388	7.0.1
Clearance Monitor	Approve Clearance Transaction	In certain cases, it is possible for a request item to have multiple clearance transactions. In cases where this has occurred, and the user approves the request item transaction in Clearance Monitor, all open clearance transactions for that request item will now be automatically approved.	ERM-12492	7.0.1
Container	Edit Container	It was possible for a user to inadvertently edit/ delete the Product Description field while on the page (the changes were never saved in the database), which is intended to be read-only. This field is now protected.	ERM-12427	7.0.1
Container Administration	Push search results to container operation	When containers were "pushed" from the Container Administration search result list to a container operation (e.g. Transfer, Submit to Automated Store, etc.) the resulting item sequence on the container operation window was random. The sequence is now the same as it was in the Container Administration Search result (unless a specific sort order is designated in the container operation window).	ERM-12405	7.0.1
Container Operations	Create/View/Edit window	After completing operations on this window, the cursor would not stop spinning, thus making it appear that the process had not completed.	ERM-12413	7.0.1
Container Operations	Networked Scanner Operations	Corrected an issue where the LastModID (ID of user who performed the last transaction) for networked scanner operations on containers was incorrectly being set to 1 (ERMSuperUser).	ERM-11150	6.2

Function	Operation	Summary of Defect	Internal Defect #	Detected in Version
Database	ACD / CPI update script	The AddNewCPIVendors.sql script, used by the CPI Upgrade Process, could unintentionally create duplicate vendors.	ERM-12439	6.2
Hand Held Scanners	Authentication	If the password entered for the ERM database is incorrect, when the hand held scanner attempts to connect to the database, the ERM database account could become locked.	ERM-12632	7.0.0
Material	Edit Material	When the specific gravity or specific volume of a material is updated, neither the standardized amount for containers of that material nor the standardized amount in associated control zones were being updated.	ERM-12508	7.0.1
Materials	Synonyms	Material synonyms were not always automatically set to upper case, which resulted in other issues in the ERM application.	ERM-12420	7.0.1
Networked Scanners	Container Open	The "Open" container transaction was not working from networked scanners.	ERM-12410	7.0.1
Requesting	Edit Line Item	When editing requisition line items that did not have an MDL or Customer Compound number, a material match previously linked to that item was always being cleared – regardless of what fields where edited. This issue either forced the user to re-match the item, or created a downstream issue in receiving. An item's material match is now only cleared/rematched if changes are made to fields that specifically would change the material matched to the item.	ERM-11243	6.2.1
Requesting	Edit Line Item	Related to issue ERM-11243, when the vendor and/or catalog number for a requested item were changed in line item edit, if there were no substance matches based on the modified data, the matched substance ID was blanked out and could not be replaced. This has been fixed so when this case occurs, ERM will automatically create a new material and link it to the edited request item.	ERM-12458	7.0.1
Requesting	Edit Line Item	When editing a line item, the description field was not populated if the product name exceeded 250 characters.	ERM-12525	7.0.1
Search	Inventory and Storeroom Search	In certain cases, searching by bar code returned the incorrect message "Maximum rows reached on Storeroom (0*)".	ERM-12416	7.0.1
Stockroom	Stock Master	When creating a stock master item from a Spend Director catalog item, the Spend Director vendor will be created within ERM (if it does not already exist). When this vendor was created the parent vendor and DUNS number from Spend Director were not being populated in the new ERM vendor. The parent vendor and DUNS number are now being populated.	ERM-12446	7.0.1
Structure Search	Configuration	For the MDL (Accelrys) structure cartridge, a parameter may be set to limit the number of structures returned in a structure search. This parameter did not work in 7.0.1, and the number of structures returned was not limited.	ERM-12129	7.0
Structure Search	Structure Rendering	On the structure search tab, when displaying the returned structures in multiple rows (as opposed to single view), sometimes the screen became distorted. This was found while testing the Marvin Beans renderer.	ERM-12422	7.0.1

Function	Operation	Summary of Defect	Internal Defect #	Detected in Version
Web Service Catalog Interface / ACI	Online Order Status	When the WSCI or ACI is configured to submit orders to an external application, on the order item search right-click menu, the "OnLine Order Status" command displays the status of the order for WSCI/ACI channels. This command was not previously working.	ERM-12386	7.0.1

9 KNOWN ISSUES

The following are known issues that are judged to be of operational significance and were either found during SciQuest internal testing of ERM 7.0.2 or detected in previous releases of ERM since the last publication of release notes. **Unless mentioned otherwise, all issues deal with the ERM browser-based module**.

Function	Operation	Summary	Internal Defect #
Container Administration	Scan Bar Codes	After scanning several bar codes into the Container Admin window, the Bar Code field loses focus, thus stopping the scanning process. Scanning may be resumed by placing the cursor back into the bar code field.	ERM-12704
Container Scan Operations	Print Bar Code Worksheet	This window allows searching for users by location. Location is selected from a location tree, which allows selection of a sub-location; however unless the location is selected at the room level or above, no users will be found.	ERM-12681
Containers	Control Zones	When a container is created via the container new window, and the container is in a control zone, the control zone inventory total is incremented by the container's original standardized amount, not the current standardized amount	ERM-12673
Data Loader	Regional Settings	The ERM Data Loader module requires a comma as a field separator and currently does not support semicolon.	ERM-12390
Deployment	Properties	Any properties entered in the [DesktopPropertiesPropertiesFile] section of [customer].properties will not be validated, therefore an invalid property entry could exist. Even with a bad entry the server and client will still work. Administrators should be very careful in entering properties into the [DesktopPropertiesPropertiesFile] section. Note that properties in all other sections are validated.	ERM-12732
Favorites	Delete Favorite	On the favorites tab, if you click Delete from the toolbar icon, but you do not have any row selected, the incorrect error message is displayed.	ERM-12415
Inventory Reconciliation	Container Transactions	There are two reported issues regarding using Inventory Reconciliation in a different time zone than the one in which the ERM server is located: When Inventory Reconciliation is used with a hand held scanner the dates of the transaction are from the scanner (user's time zone). When that transaction is viewed in ERD the time zone is adjusted making the time incorrect. Example Scanner set to UK time (12:00pm), Server is eastern time (7:00am). Container Inventory and History records have time from Scanner (12:00pm). When a user in the UK views the the container history the time of the transaction is 5:00pm - because ERD converts the server tie (12:00 pm) to the user's time zone (5:00 pm). User performs inventory reconciliation on container "A" at noon UK time. In the database the history records have a time of noon. In the UK, at 12:05 UK time, 7:05 am server time, a user attempts to move "A" to another room via the ERM GUI Container Transfer Operation. ERM displays an error message, because it sees a history record in the future – 12:05 pm is later than 7:05 am.	ERM-12697
Mac	General UI	On the Mac, if you click outside the dialog window, the drop down menu can stick on the screen causing the dialog menu to disappear. This happens in 3 places: Assign a Role, Assign Cost Center Groups, Assign List Controlled Room	ERM-12673
Mac	Various	Mac keyboard shortcuts do not apply to ERM. The ERM keyboard shortcuts will work. For example on several pop-ups Alt-C will Cancel the operation and close the window in ERM	ERM-12550
Materials	Edit Material	When the specific gravity or specific volume of a material is updated, the aggregate inventory levels (by room and material) associated with that material are not updated	ERM-12508
Orders	Approvals	If an Approval Type is specified as Line Item Criteria, only results that currently require that Approval Type are displayed, not any items that did require that Approval Type and have already been approved.	ERM-12463
Orders	Copy to Requisition	On the orders tab, when choosing "Copy to Req" for a Spend Director item that receives a hazardous alert, and then clicking Cancel, the user will receive a 'communication error' which also appears in the Java Console log file.	ERM-12404

Function	Operation	Summary	Internal Defect #
People	People Search	If you add an Organization, Role, or Model User, the new values do not immediately appear in the associated pull-downs on People Search. You must log out and log in to see the updates. Related behavior occurs when deleting values.	ERM-12634 ERM-12643
People	Person Window / Rules Engine	When the rules engine is configured to allow person attribute updates for those within the same organization, it does not apply to the sub-orgs of that organization.	ERM-12640
People	Edit Cost Centers	In the Edit Cost Center window (reached through the Manage Cost Center Groups window) it appears that you can change the cost center name by putting the cursor in the cost center. You can change the cost center name, but when you hit save the cost center name doesn't get saved.	ERM-12736
Reporting	Inventory Level Table	Normalized current amount, normalized minimum amount, and Normalized maximum amount are not correctly calculated when containers of the same material are inventoried in a combination of mass and volume units. Caution should be exercised in using these values in custom reports (there are currently no standard ERM product reports based on these values)	ERM-12495
Reports	Stop/Start	For reports that are scheduled to be run every [M] minutes, starting at time [T1] and stopping at time [T2], if a report is stopped before [T2] and never restarted on that day, the report will never run again. Example: If a report is scheduled to run every 5 minutes, starting at 8:30 am and stopping at 9:00 am, and the user stops the report at 8:18, and does not restart it until 9:05, the report will never run again until the server is restarted.	ERM-12652
Reports	Inventory Report	On the Inventory Report, created from "Reports | Inventory Report by Room", the "Restricted Field" will be set to "No" for any Lists created in 6.2.2 or after. This field should show if the container is on any list with a severity of "Fatal" or "Severe".	ERM-12730
Request	SciQuest Hosted Catalog / Regulatory Lists	If an item is flagged by the supplier as a controlled substance, but is not matched to an ERM controlled substance list, the status of the requisition item will be set to New, instead of EHS Approval Required.	ERM-12394
Scan Operations	Bar Code Worksheet	Inactive users may be selected to print on a bar code worksheet	ERM-12406
Shopping Cart/ Acquire	Add Spot Buy Item / Regional Settings	When adding a spot-buy item, ERM will automatically remove all commas from a price value, ignoring any regional setting where the comma is used as a decimal point separator.	ERM-12440
Shopping Cart/ Acquire	Line Item Add/Edit – Vendor Info	Duplicate Vendor type values may appear in the list, but do not appear to have any adverse consequences	ERM-12514
Source Search	Filter	If you search, then push one or more items to the Shopping Cart, then return to the source search and click filter, the Filter Icon does not display correctly	ERM-12529
Source Search	Stockroom Search	Stockroom searching does not currently use the My Sites / All Sites user preference	ERM-12581
Source Search	Storeroom – Push to Acquire Tab	ERM prevents a container being pushed to the Shopping Cart tab from Storeroom Source Search, if the container is already on a Delivery Request. However, until the Delivery Request for a container is submitted, that container can be requested by another user. In this event, one container can appear on multiple Delivery Requests.	ERM-12452
Structure Search	SMILES Import / SQ Hosted Structure DB	On the structure search tab, with only the SQ Hosted ("Spenddirector") structure database selected, if you paste a list containing exactly one SMILES and click search, you will get an error message that cannot be cleared. It is necessary to select an additional structure database and redo the search. If no other structure database is configured for ERM, the user will need to restart ERM.	ERM-12414
Structure Search	Structure Availability Report	The structure availability report ("Print" from the structure search tab) DOES take into account the "Inventory filtered by Preferred Sources" setting on the Structure Search tab. However it does not take into account other settings used by structure searching (Search All Sites/My Sites preference, container reservations, and permission to see all containers)	ERM-12569

10 Changes in Properties file

This section lists the configuration options in the ERM [customer].properties file that have been added for the 7.0.2 release. Note that [customer] should be replaced with the actual name of your properties file.

10.1 Structure Registration

The structureRegistration.enabled property has been removed. If this is currently set in your [customer].properties file it must be removed.

In previous releases the following configurations were required in order to enable structure registration from ERM

1) ERM configured to have a registry database
2) Property structureRegistration.enabled set to true
3) User must have the "View Registry Structure" permission

In this release, if ERM is configured to have a registry database then users with the required permissions may register structures.

10.2 Web Service Catalog Interface (WSCI)

The ERM Deploy script has been updated with "Placeholders" for WSCI channels. If you have implemented WSCI channels please contact SciQuest support for more information. Note these changes only apply to WSCI channels not ACI (Advanced Catalog Interface) channels. Changes are required only to the customer property file.

11 DATABASE MODIFICATIONS

This section lists the *major* database modifications for ERM V7.0.2. To see *all* the changes, please read the README702.TXT and the ALTERDB702.SQL files. Follow the directions in README702.TXT to upgrade an ERM 7.0.1 database to ERM 7.0.2. These two files are located in the \Database\ERM\CreationScripts directory on the ERM CD.

The upgrade package for ERM V7.0.2 comes with several database upgrade scripts as well as a README702.TXT file. The README702.TXT file gives detailed steps on running the database upgrade scripts. The upgrade scripts will modify and create database objects. The README702.TXT file released with ERM 7.0.2 provides the order of execution of the scripts. *Note that the upgrade scripts should be run from SQLPLUS and that certain environment variables will need to be set. Log files should be created and checked during upgrade using the SPOOL [filename] command from SQLPLUS.*

After running the database upgrade scripts, verify that all necessary objects are in your database. Run the following SQL scripts to ensure that all objects have been installed.

```
select upper(OBJECT_NAME),upper(OBJECT_TYPE) from ermobjects
minus
select upper(OBJECT_NAME),upper(OBJECT_TYPE) from user_objects;
```

If the above query returns zero rows, then all the objects have been installed in the database. If it returns one or more rows, then objects are missing and the objects must be created. To create these objects, please see the upgrade scripts or contact SciQuest Support.

Table	Table Status	Description
PSLabelClass	New	New table to designate the class of a label as Container, Sublocation, or Employee.
PSLabelType	Modified	Added column for PSLabelClassID which contains the class of each label. On upgrade labels with pslabeltypid=2 (which is by default the "Sublocation Label") will have its class set to Sublocation, labels with pslabeltypeid=3 (which is by default the "Employee Label") will have its class set to Employee), and all other label types will have their class set to Container.
Org	Modified	Added CreatorID and CreatedDT.
SDS*	New	New tables used in integration with third party MSDS systems.
SubstanceMSDSupport	New	New tables used in integration with third party MSDS systems.