

RMM 19.2 Quick Reference Guide for Researchers

SEARCHING FOR REAGENTS

Text-Based Search

The search widget on the Researcher home page and Source Search window uses search engine capabilities to return results.

- Criteria include chemical name, CAS number, catalog or manufacturer part numbers, supplier or manufacturer name and other values
- Criteria can be combined for OR searching using a space or comma
- Criteria can be combined for AND searching using & or +
- Wildcard searching can be performed using * or %

Use the **Home Page search widget** when you want to search all possible source types without further specification.

Use the **Source Search window search widget** when you wish to select specific source types and/or preferred locations.

1. Enter search criteria in the **search widget**.
2. Click the **Search** button.
3. Use the **Channel icons** to view the search progress. Click a **Channel icon** to view the results for that source type.

Structure Search – Include Results

ERM Researcher allows you to search by a structure MOL file or by a list of structure identifiers *and automatically execute a source search for items matching the maximum of 200 returned structures*

- Click the **Home Page > Structure Search** tile to navigate to the Structure Search window
- Select the **structure search type** from the drop-down list
- Click one or more check boxes to select the **structure database(s)** to be searched
- Click the **Include sources?** check box

MOL file search:

1. Click the **Import** button to navigate to the location of a mol file to import, select it and click **Open**
OR copy a structure from an external application and click the **Paste** button
OR click the **Edit** button to open the structure drawing tool, **draw the desired structure** and then click **X** to close the tool and return the structure.
2. Click the **Search** button.

Structure Identifier search:

1. Select the structure identifier type from the drop-down list.


2. Click the **Import List** button to navigate to the location of an identifier list file to import, select the file and click **Open**
OR click the **Paste List** button and paste a list of structure identifiers from another program or the system clipboard.
3. Click the **Search** button to begin the structure search. Once the structures have been discovered, the source search will automatically begin.

Structure Search – Not Include Results

ERM Researcher allows you to search by a structure MOL file or by a list of structure identifiers *and return just the structures for further processing* prior to a source search.




Searching by MOL file OR structure identifier is the same basic process as with “Include Results” without selecting the **Include sources?** check box.

A maximum of 2000 matching structures will be returned in a selectable structure grid

- Click a structure’s **check box** to select for sourcing or export
- Click a structure’s **Remove** icon  to remove it from the result set
- Selected structures can be **exported to a SD file**
- Selected structures can be **exported as a list of structure identifiers**


WORKING WITH SOURCE SEARCH RESULTS

Source search results are presented by source type. When returned from a structure search selection, an additional **structure navigation bar** enables limiting the displayed results to those that match the selection.


- Click a **Channel** icon to view the results for that source type.
- Click the **Add to Shopping Cart** icon  to add the item to your Shopping Cart for requesting
- Click the **Add to To Do List** icon  to add lab containers or containers in self-service storerooms/stockrooms for later
- Click the **Add to Favorites** icon  to add a favorite item for frequent ordering

CREATING REQUESTS

Navigate to the **Shopping Cart window** to review your request item(s).


1. Click the **View Actions Required** button  on an item to open the Actions Required popup window for the item

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2. Click the **Fix** button  for a required action and complete the task
3. When all required actions have been completed, the **Proceed to Checkout** button will be enabled. Click the button to navigate to the Checkout window

**** You can Add a Type-in Item, Edit an Item or Delete an Item at any time prior to checking out**

From the Checkout window:

1. Verify the **Cart Information elements**; required values are indicated with (*):
2. Click the **Delete Item** button  to remove any request item before completing the check out
3. Click the **Submit** button to submit the cart and generate the individual source type requests

Create a "Type In" Request Item


From the Shopping Cart window:

1. Click the **Add Item** button to open the **Add Type In Item** window and create the item.
2. Complete the required fields; required values are indicated with (*).
3. Click **Save** to create the item.

WORKING WITH CONTAINERS

Using the To Do List

The **To Do List** is a list of items that are available from labs, self-service storerooms, and self-service stockrooms.

1. Click the **To Do List** home page tile or action icon to open the To Do List window.
2. Click the **Mark as Complete** button  to open the Complete To Do List window for a container when you have kept it or when you have removed contents.
 - Select **Yes** to transfer the container to you
 - Enter the **quantity removed** from the container in the **How much did you use** field to update the container's quantity
 - These actions may be completed independently of each other
3. Click the **Complete** button to confirm your changes and close the popup window.

Container Search to Container Operations





The **Container Search** window is used to find containers and initiate container transactions.

1. Click the **Home Page > Container Search** tile to open the Container Search window.
2. Select your **Search type**:

- Quick search – text string (default search)
 - Advanced – several options with enterable or selectable values (e.g., date range, location, etc.)
 - Bar Code – scan a single bar code or import/paste a list of bar codes
3. Click the **Search button** to locate and return a maximum of 20K container(s) and display information.
 4. Click the **check box** for each container to be acted on, and select a container **Operation** from the drop-down list:
 - **Transfer** (to yourself/another user/location)
 - **Dispose** – container status is "Disposed", retains current quantity information
 - **Dispose Empty** – container status is "Disposed Empty", container quantity set to zero (0)





OR

Click the appropriate **Operation button** for a single container:

- **Edit**  – selected properties such as dates
- **Replicate**  – create multiples with original or current date
- **Change Quantity**  – enter a plus/minus amount, change unit of measure, set current amount
- **Select**  - View Container / View Container History / View MSDS / View Safety Label / Print Label

WORKING WITH REQUESTS

Navigate to the **My Requests** window to review your submitted request(s).

- Default display is last 30 days in descending date order.
 - Display can be modified to show requests by other date ranges and by active/closed/all.
1. Click the **View Warnings icon**  to view all warnings associated to a request item.
 2. Click the **Approval Details icon**  to view the status of any required approvals.
 3. Click the **Reorder icon**  to add the item to your shopping cart.
 4. Click the **Cancel Requisition Item icon**  to cancel the item.