# ShopUW+

# PROCURE-TO-PAY AUTOMATION PROJECT

## ChemManager+
*Your tool for ordering and managing chemicals*

Fall 2022

# WHAT IS CHEMMANAGER+?

ChemManager+ is a platform for managing chemicals that integrates with ShopUW+ and supports research, instructional, safety, and risk staff in their work. It is part of a multifaceted project to update, standardize, and improve procurement processes across the University of Wisconsin System. It allows us to:

- augment our ability to ensure the safety of faculty, staff, and emergency responders
- facilitate the work of faculty and staff to order, track and dispose of chemicals
- better manage costs for units through better sourcing, tracking, and inventory control
- enhance our ability to demonstrate compliance to regulating agencies.

Enter ChemManager+ through ShopUW+ → Shop for chemicals → Submit cart to ShopUW+ → Receive chemical containers → Attach a ChemManager+ Barcode → Assign container to your location → Use chemicals → Dispose of Containers and update ChemManager+

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# EXPECTATIONS

- Labs are expected to purchase chemicals through ChemManager+.
- Once you receive the containers, you will need to add a barcode and assign those containers to a specific room in your lab. You may choose to further categorize them into sublocations, such as shelf or fridge, within each room.
- Chemicals not purchased through ChemManager+ need to be manually added to your ChemManager+ inventory.
- If you transfer a container from one location to another, you should update the ChemManager+ entry. This ensures we maintain an accurate inventory of chemicals at each location.
- Once you have used the contents of a container, it should be disposed of appropriately. You are expected to update the container status in ChemManager+ so that is shows it has been disposed of.
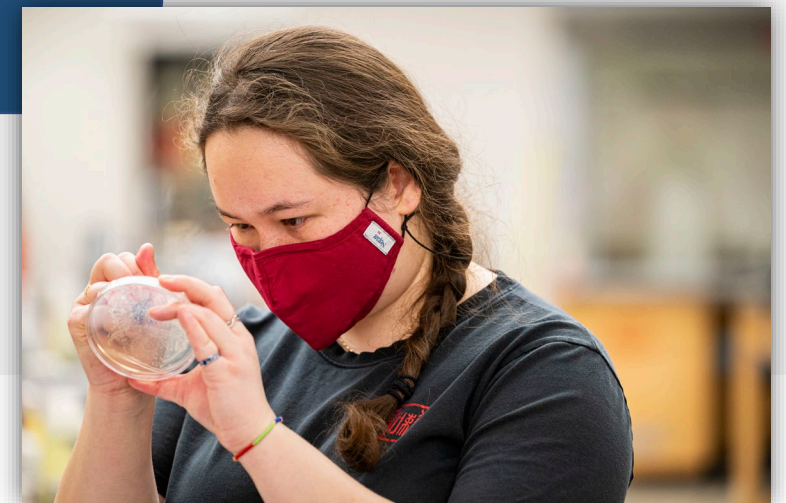
**Emergency Preplanning and Response**
-Chemical locations and hazards
Buildings/ room -specific response
-EPA
-EPCRA
-SARA Tier II
-WEM
-LEPC
- Police/Fire Dept.

**Safety Training:**
-Training Needs
-Specific training Requirements
-DSPS/ OSHA
-DNR/EPA

**Personal Protective Equipment (PPE)**
-PPE Selection
-Respiratory Protection needs
-DSPS/ OSHA

Safety Glasses
Lab Coat
Covered Legs
Closed Toed Shoes

**Chemical Waste Management**
-Hazard Class Segregation
-Cradle to Grave Tracking
-DNR
-EPA

**Fire and Life Safety**
-Fire detection & suppression
-Maximum Storage Quantities
-DSPS – WI Comm Bldg. Code
-NFPA
-IBC/IFC

Lab Safety

**Lab Safety Programs**
-Identification of high hazard chemicals
-Lab-Specific SOPs
-DSPS/ OSHA

S D S SAFETY DATA SHEETS INFORMATION For EMPLOYEES

**Hazard Communication**
-Comprehensive SDS Availability
-SDS Management
--DSPS/ OSHA

**Chemical Storage**
-Right-sized inventories
-Proper storage and segregation
-DSPS/ OSHA
-IBC/IFC
-NFPA

**Chemical and Reagent Information**

**Indoor Air Quality**
-Identification of inhalation hazards
-Air monitoring requirements
--DSPS/ OSHA

**Lab Door Signs**
-Room Emergency Contacts
-Chemical Hazard Information
-DSPS/ OSHA

**Environmental Permits**
-Air & Sewer discharge permits
-Hazardous materials reporting
-MMSD
-DNR/ EPA

**Medical Monitoring**
-Monitoring requirements
-Exposure Investigations
--DSPS/ OSHA

**Hazardous Materials Security**
-DHS compliance
-Building/ room -specific security requirements
-DEA
-CDC

**Laboratory Ventilation**
-Building/ room ventilation requirements
-Hood selection & location
-IBC
-DSPS/ OSHA

**A selection of agencies that may require chemical and reagent information from us**

- **Center for Disease Control (CDC)**
- **Department of Natural Resources (DNR)**
- **Department of Safety and Professional Services (DSPS)**
- **Drug Enforcement Agency (DEA)**
- **Emergency Planning and Community Right-to-Know Act (EPCRA)**
- **Environmental Protection Agency (EPA)**
- **Emergency Planning Comm. Right to Know Act (EPCRA)**
- **International Building Code (IBC)**
- **Interpronal Fire Code (IFC)**
- **Local Emergency Planning Committees**
- **National Fire Protection Agency (NFPA)**
- **Occupational Safety and Health Act (OSHA)**
- **Superfund Amendments Reauthorization Act (SARA)**
- **WI Commercial Building Code (WCBC)**
- **Wisconsin Emergency Management (WEM)**
- **Police and Fire Department**

# RESOURCES & SUPPORT

**Tipsheets and videos**
- **https://go.wisc.edu/l12rvp**
- **Click on the ChemManager+ category on the left-hand side.**



UNIVERSITY OF WISCONSIN SYSTEM

SHOPUW+ LOGIN    SHOPUW+ ESSENTIALS    SFS TRAINING

ShopUW+

Search Tipsheets

Choose a Category

Shopper Resources
Requester Resources
Approver Resources
ChemManager+
Purchasing / AP Resources
Searching and Reporting

## CHEMMANAGER+ RESOURCES

### Getting Started
- Access ChemManager+
- Setup User Profile in ChemManager+ ( Tipsheet / Video )

### Shop & Receive
- Shop for Chemicals in ChemManager+ ( Tipsheet / Video )
- Shop for Chemicals - Reorder from a Catalog in ChemManager+
- Receive Deliveries in ChemManager+ ( Tipsheet / Video )

### Material Operations
- Search and View Materials in ChemManager+
- Create Materials in ChemManager+ (PI, Lab Manager, and EHS Manager)
- Edit Materials in ChemManager+ (PI, Lab Manager and EHS Manager)

### Container Operations
- Search and View Containers in ChemManager+
- Create Containers in ChemManager+
- Edit Containers in ChemManager+
- Transfer Containers in ChemManager+
- Dispose of a Container in ChemManager+
- Search for Containers with Specific GHS Hazards in ChemManager+
- Search for Items Due to Expire in ChemManager+
- Update Container Expiration Date in ChemManager+

### Project Space
- Create and Manage Project Spaces in ChemManager+ (PI, Lab Manager and EHS Manager)
- Assign and View Project Space Containers in ChemManager+

### Reporting
- Generate and View Reports in ChemManager+ (PI, EHS, and Recieving)

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# RESOURCES & SUPPORT

**Your friendly, local US&A Staff**
- safety-office@uwm.edu

**Problem Solvers (Customer Service)**
- Website: https://shopuwplus.wisc.edu/support/#Contact
- Phone: (608) 263-3100
- Email: uwsaproblemsolvers@uwsa.edu

**Website Resources**
- ChemManager+ Project Page: https://shopuwplus.wisc.edu/chemmanager/



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# GETTING INTO CHEMMANAGER+

**ChemManager+ works best in Chrome**

Step 1: **Log in to ShopUW+**

Click this link to log in to ShopUW+:

https://solutions.sciquest.com/apps/Router/SAMLAuth/UWisconsin.

Read any messages and act on any prompts.

Scroll down until you find this area.

Click on the **Lab Supplies** tile.

Jump To...

Lab Supplies | IT Supplies | Facility Supplies

Office Supplies | Help | Legacy View

**ShopUW+ is the procurement management system for all UW System schools. ChemManager+ is a "punchout" from ShopUW+.**

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# GETTING INTO CHEMMANAGER+

Step 2: **Entering ChemManager+**

On the next screen, find and click on the ChemManager+ tile.

See the Tip Sheet at https://go.wisc.edu/l12rvp



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# GETTING INTO CHEMMANAGER+

Step 3: **Set up your defaults**

Your first task will be to set your primary location.
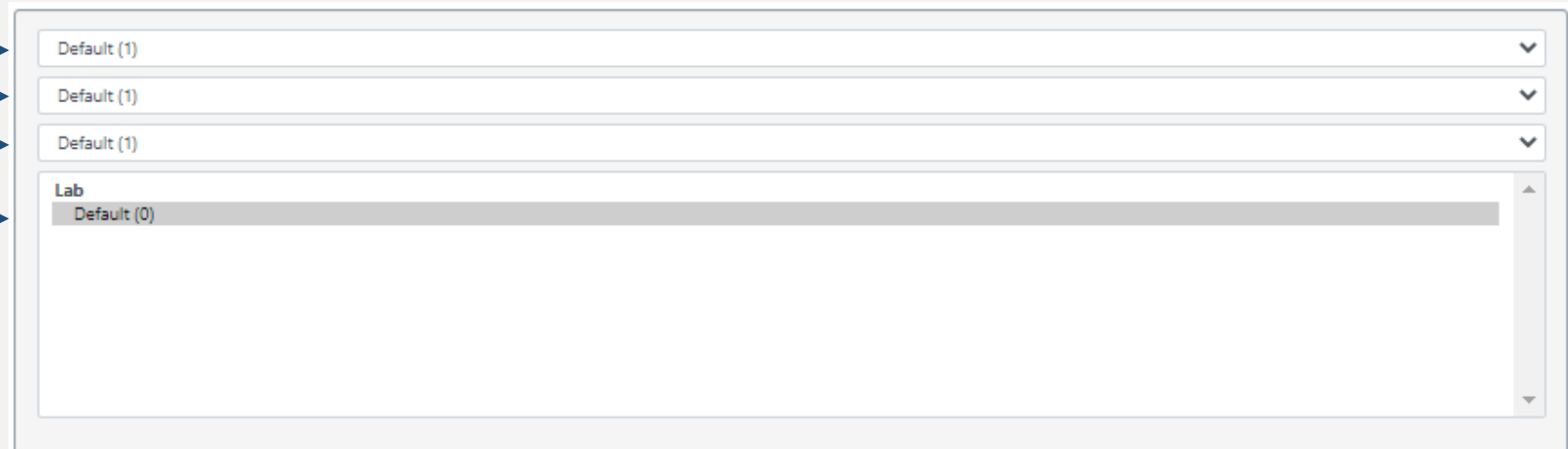
**First:** Choose your institution → `Default (1)`

**Second:** Choose your building → `Default (1)`

**Third:** Choose your floor → `Default (1)`

**Fourth:** Choose your lab from the list →

> **Lab**
> Default (0)

Then click **Save.**

**ChemManager+ has a hierarchical structure, so you must choose your institution (campus) before you can choose lower-level locations.**

**Your "primary location" is the place your chemicals are most likely to be located.**

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# GETTING INTO CHEMMANAGER+

Step 3: **Set up your defaults**
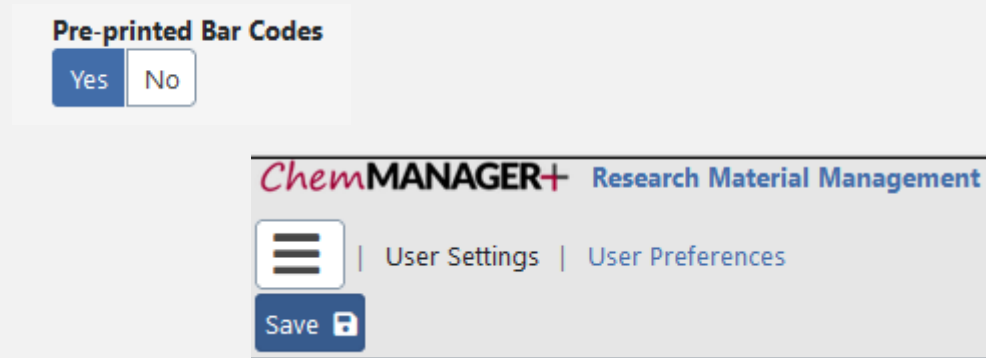
On the next screen:

- Ensure **Yes** is selected for Pre-printed Bar Codes.

- Enter your contact phone number in the Phone # field.

- Update your email address, if needed, in the Email field.

Then Click the **Save** button in the upper left corner.

NOTE: The confirmation message "Operation completed successfully" will appear in the upper right corner of the page.

See the Tip Sheet and video at https://go.wisc.edu/l12rvp

**Pre-printed Bar Codes**
Yes | No

ChemMANAGER+ Research Material Management
☰ | User Settings | User Preferences
Save 💾

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# GETTING INTO CHEMMANAGER+

Step 4: **Finding the ChemManager+ Landing page**

Click the ChemManager+ logo in the top left corner to go to the ChemManager+ Landing Page.

ChemMANAGER+ Research Material Management

Before you can use ChemManager+, you must read and acknowledge the Privacy Notice. Then click **close**.
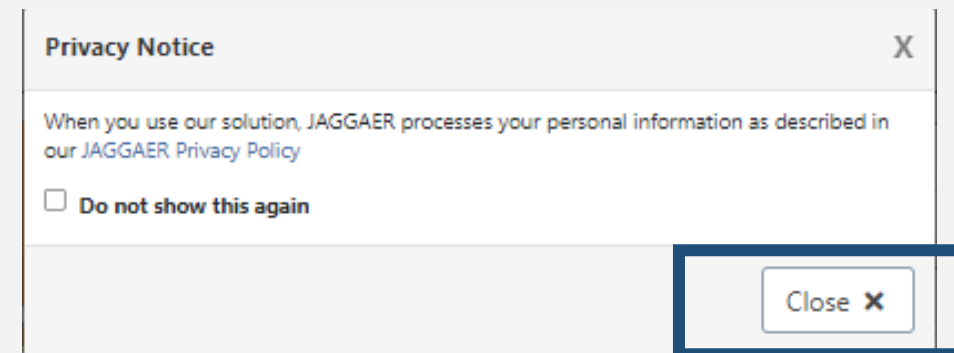
**Privacy Notice**                                                              X

When you use our solution, JAGGAER processes your personal information as described in our JAGGAER Privacy Policy

☐ **Do not show this again**

Close ✕

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# GETTING INTO CHEMMANAGER+

Step 4: **Finding the ChemManager+ Landing page**

The ChemManager+ Landing Page looks like this:
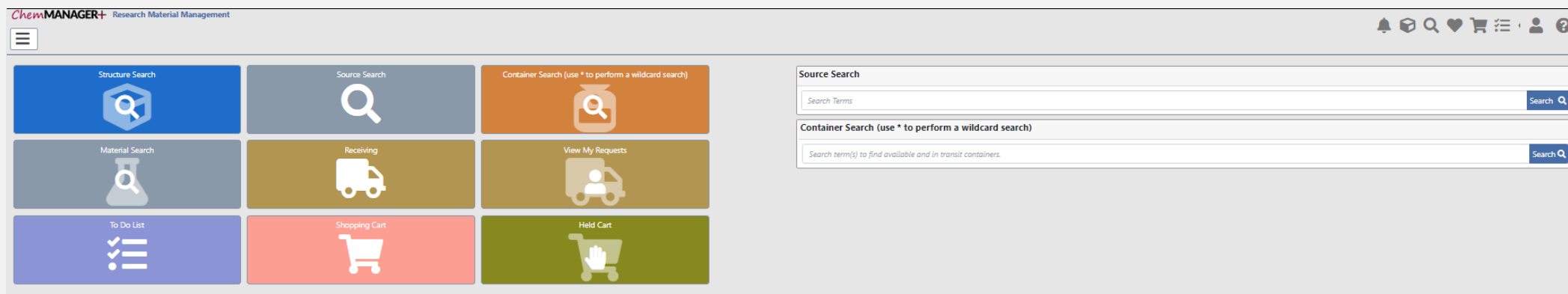


**You can customize this screen by adding tiles and changing colors using the gear icon in the lower right corner of the screen**

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# WHAT SHOULD BE ORDERED IN CHEMMANAGER+?

Suppliers and products are continually being added to ChemManager+.

If a product is available in ChemManager+, you should order it through ChemManager+.

## Available in Chem**MANAGER+**

Including, but not limited to:
- Chemical reagents
- Gas cylinders
- Solvents

Products with a CAS # from these suppliers:
- Abcam
- Bio-Rad
- Dot Sci
- Fisher Sci
- Life Tech
- Meta Sci
- MidSci
- Qiagen
- Santa Cruz
- Sigma
- VWR

## Available in Chem**MANAGER+** or Shop**UW+**

Kits
Enzymes
Buffers
Biologics
Commercial cleaning aids

These items **may** be added to your ChemManager+ inventory.

## Available in Shop**UW+**

Items without a CAS# such as
- test tubes
- gloves
- other consumables

Not required to add to inventory.

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# CONTAINERS VS MATERIALS

**Containers** are the physical bottles, jars, boxes, etc. that contain chemicals.

Each container gets a unique ChemManager+ barcode. You can give each container a descriptive **Label Name** in ChemManager+. This is the name you will view and search by.

All Containers are associated to a **Material Profile**.

The Material Profile contains the data associated with the container's chemical substance. This includes:

- Proper Chemical name and identifiers (CAS #, MDL, Chemical Structure)
- Safety information (SDS, GHS Hazards)
- Physical Properties

**Containers**

**Material Profile**

# SHOPPING FOR CHEMICALS

Step 1: **Searching for chemicals**

Click on the Source Search tile.
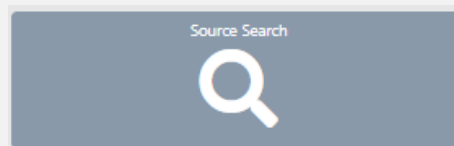
Then enter a chemical name, CAS number, chemical formula, or catalog number into the search bar.

Then click on **Search**.

This user is searching for acetonitrile in labs, stockrooms, storerooms, hosted catalogs, and eMolecules.
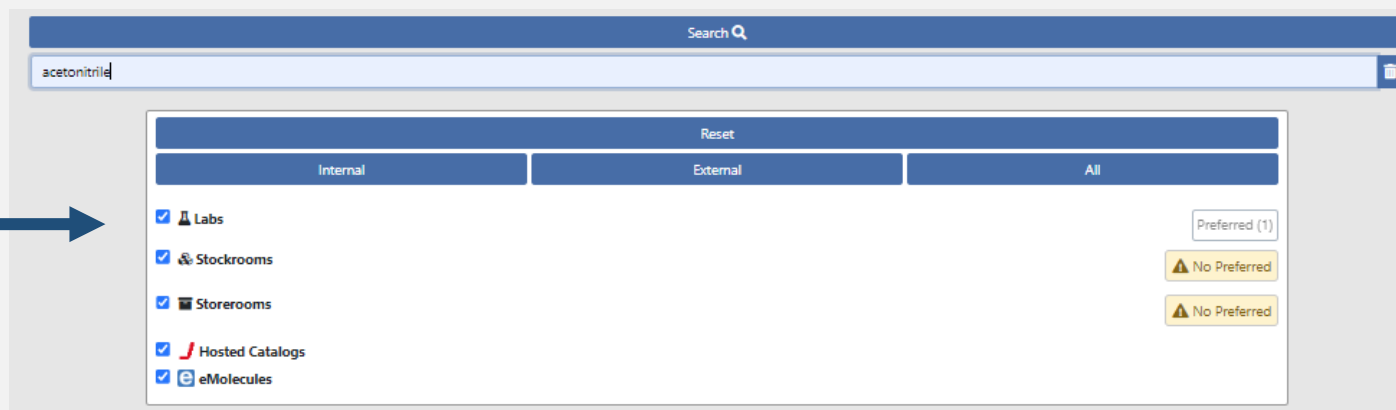
**Laboratory chemicals must be ordered in ChemManager+ (items with CAS#). Items without a CAS# (test tubes, gloves, and other lab supplies), should be ordered in ShopUW+.**
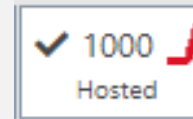
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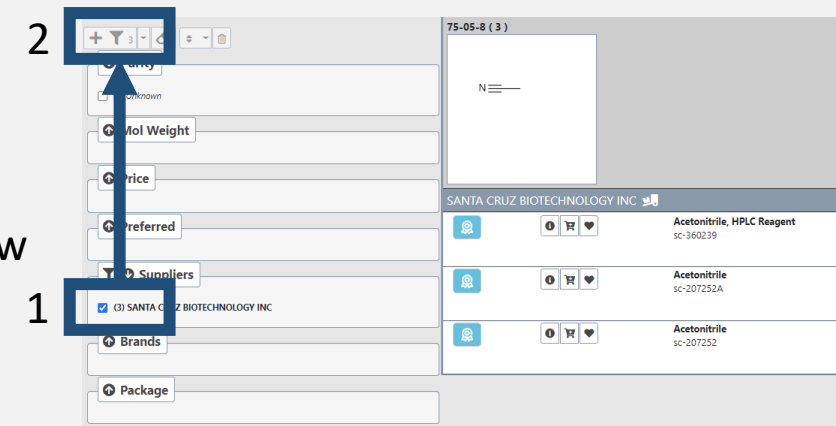
# SHOPPING FOR **CHEMICALS**

Step 2: **Adding materials to your cart using hosted (preferred) suppliers**

Once the search results are complete, click on the **Hosted** button.

If you have a lot of results, use the filters on the left side of the screen to narrow the results. First select the options, then click the **filter** icon at the top of the screen.

Once you find the materials you want, click the **shopping cart** icon.

The **i** icon displays information from the supplier about the material.

The **heart** icon adds the material to your favorites. This is useful if you regularly order materials from a supplier.
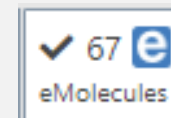
# SHOPPING FOR **CHEMICALS**

Step 2: **Adding materials to your cart using eMolecules**

Once the search results are complete, click on the **eMolecules** button.

eMolecules provides direct access to a vast collection of readily available advanced chemical intermediates from hundreds of suppliers. Results are displayed in order of speed of delivery – accelerated, Tier 1, Tier 2, etc.

You can use the filters on the left side of the screen to narrow the results. You can also use the i icon to display information from the supplier about the material. You cannot designate favorite eMolecules supplies.

Once you find the materials you want, click the **shopping cart** icon.
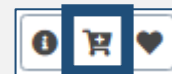
A small sample of suppliers:
- Ambeed
- Chem-Impex
- Combi-Blocks
- Medchem Express
- Oakwood Products
- TCI America

**eMolecules suppliers are a feature of ChemManager+ and are NOT available in ShopUW+.**

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# SHOPPING FOR **CHEMICALS**

Step 3: **Ordering**

As you add materials to your cart, a blue number will display on the **cart** icon in the top right corner of the screen. Click on this icon to view your shopping cart.

If an **Action Required** icon is displayed, click the icon.

You may have one or two actions to perform:

**Actions Required**                                    X

Item matches multiple materials.

Material class is required.

Close ✖

- **Click the Fix icon (red wrench)**
- **Select a material from the list that represents the cart item**
- **Click the Select button, in the lower right corner**
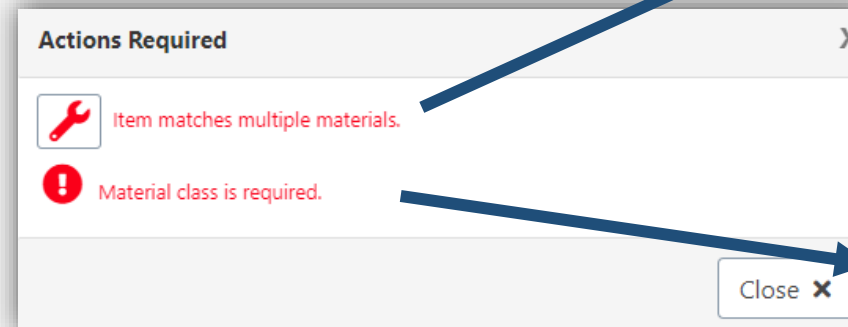
- **Click the Fix icon (red wrench)**
- **Select a class of material from the list that represents the cart item**
- **Click the Select button, in the lower right corner**

**Linking an incorrect material profile will associate the wrong chemical and safety information for the container. If unsure which profile to choose, contact your Institution EHS team.**

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# SHOPPING FOR CHEMICALS

Step 3: **Ordering**

Once you are ready to submit your order, click on the **Proceed to Checkout** button.

> Proceed To Checkout »

Verify the Cart Name, Container Owner, Container Location, and item information is correct.

The Cart Name will be different in ShopUW+.

Click the **Send to ShopUW+** button, in the upper left corner.

> Send to ShopUW+ »

Follow the ShopUW+ process to complete the shopping cart.

See the Tip Sheet and video at https://go.wisc.edu/l12rvp.

> **This location is where the container will be added to inventory when it is received!**
>
> **Your shipping address is set up in ShopUW+.**

Submit »

**Cart Name** *

MCCOY00000070

**Container Owner** *

user@system.edu

**Container Location** *

UWMSN>Chemistry Bldg, 0047>1>1225

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# RECOMMENDED SCANNERS

Scanners are used to simplify the process of engaging with 10-digit barcodes such as receiving and disposing of a container.

These are the recommended barcode scanners for ChemManager+. They are easy to set up using the included instruction manuals or online resources.

When you set up your scanner, make sure that it is configured to insert a carriage return after each scan. This will save you having to hit the enter key on your keyboard after every scan.

| Tethered | Wireless |
|---|---|
|  |  |
| Unitech MS836 | Adesso NuScan 4100B |
| **ShopUW+ Info:** Vendor: CDW Government Catalog #: 6265946; Manufacturer Part #: MS836-SUCB00-SG | **ShopUW+ Info:** Vendor: Staples Advantage Catalog #: IM14D4295 Manufacturer Part #: NUSCAN 4100B |

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# RECEIVING AND BARCODING CONTAINERS

Once the supplies you ordered arrive at your lab, the containers need to be logged in ChemManager+ using a process called **Receiving**.

In this process, a **unique ChemManager+ barcode** is attached and associated to the physical container and then assigned to the container record in ChemManager+.

See the Tip Sheet and video at https://go.wisc.edu/l12rvp

ChemManager+ barcode labels are available in two sizes and can be ordered from ShopUW+ in the MDS Corestock-Labels catalog.



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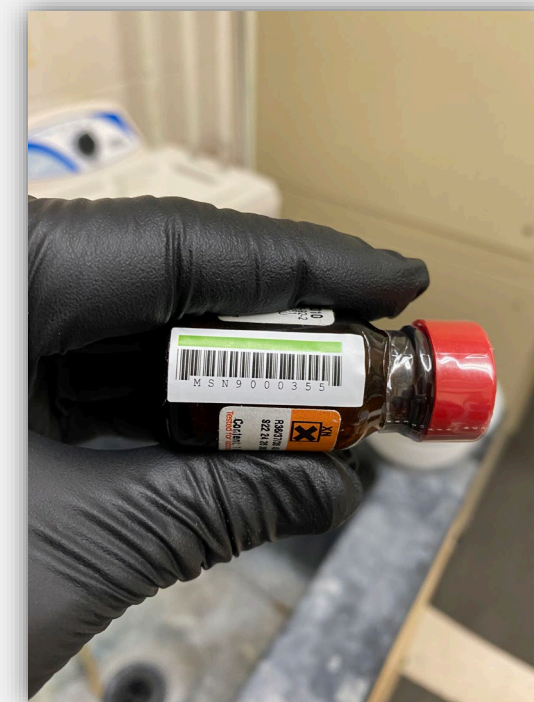
# ADDING INVENTORY

All chemicals available in ChemManager+ must be ordered through ChemManager+, rather than through ShopUW+ or directly from a supplier using a Pcard. By doing this, we can negotiate better pricing for everyone in UW System and reduce administrative burden on staff.

Chemicals not ordered through ChemManager+ (such as existing legacy chemicals or items not available in ChemManager+) will need to be manually added into your ChemManager+ inventory.

Bulk container uploads are possible from existing inventories using excel templates. Contact US&A for more information on this process.

# ✚ ADDING INVENTORY

Log in to ChemManager+ and select the **Material Search** tile.

Enter the name of the material in the white **Name** field and click the blue **Search** button. Note that this is an exact match search – check your spelling!

Select the appropriate material profile and then click on the **Create Container** icon (a + next to a container) under the **Action** tab for that item.

New Materials can be created if the substance does not currently exist (Only available for PIs, Lab Managers and EHS Managers). **Contact US&A for assistance with materials!**

**Care must be taken to prevent multiple material profiles created for the same chemical. Search by CAS or other synonyms before creating a new material!**

# ADDING INVENTORY

Apply a barcode to the container and then enter that barcode in the space provided and click on **Add+.** Then click the blue **Continue** button.

Complete the necessary fields in the **Create Container** edit page. This includes information requested in the **General, Product Information, Dates, and Locations** boxes. You can also reserve the item for a project, if you have these set up, and add attachments.

Click **Create Container +** at the top of the screen.

If successful, the confirmation "**Container created**" appears in green in the upper right of the screen.
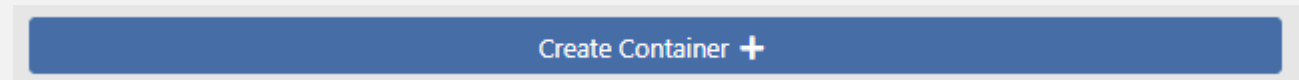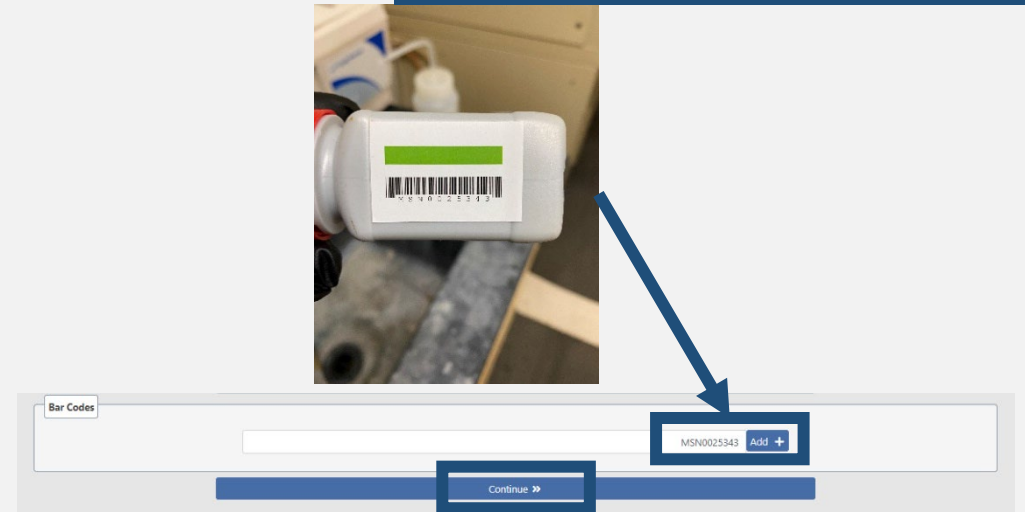
# PROJECT SPACES

In ChemManager+, it is possible to create a project space for your lab. When you **reserve** containers to your project, only users who are in your lab can see the lab inventory.

For more details on this functionality, see the two Tip Sheets at https://go.wisc.edu/l12rvp. They allow you to:

- Create and Manage Project Spaces in ChemManager+

(Only available for PIs, Lab Managers and EHS Managers)

- **Reserve** and View Project Space Containers in ChemManager+
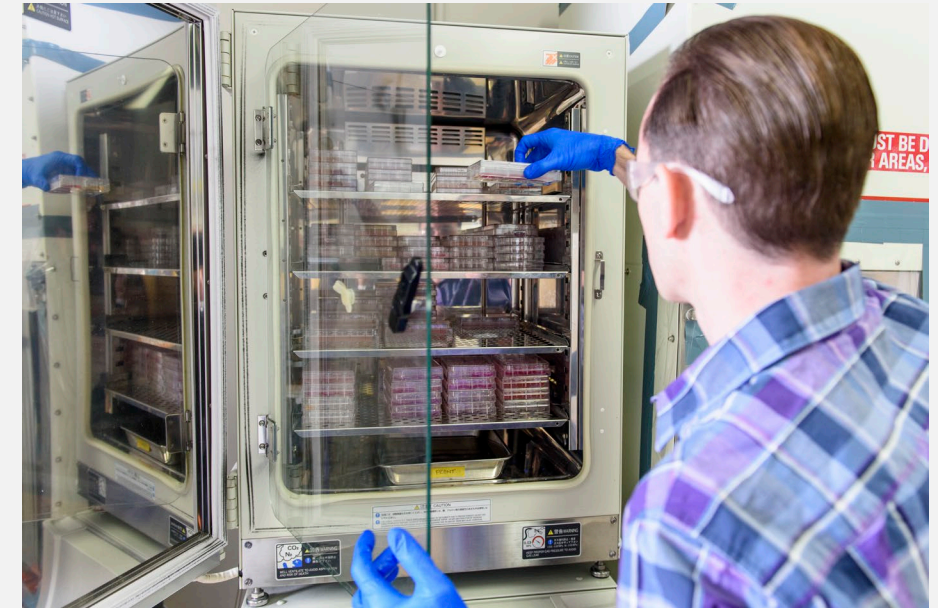
**In early 2023, project spaces will be replaced by a PI function that will work in a similar way.**

**Default Reserve Container**

Yes    No

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# MANAGING CHEMICAL CONTAINERS

Once your container is in ChemManager+, these functions can be performed to help you manage your inventory.

- Search and View Containers in ChemManager+
- Create Containers in ChemManager+
- Edit Containers in ChemManager+
- Transfer Containers in ChemManager+
- Dispose of a Container in ChemManager+
- Search for Containers with Specific GHS Hazards in ChemManager+
- Search for Items Due to Expire in ChemManager+
- Update Container Expiration Date in ChemManager+

Tip Sheets are available for these actions at: https://go.wisc.edu/l12rvp

**When you transfer a container from one location to another, the ChemManager+ record should be updated accordingly.**

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# USING AND DISPOSING OF CONTAINERS

When you are ready to dispose of a container, you can find it in ChemManager+ using the unique barcode.

Click the check box to select the container for disposal.

Click the **Operations** button and select **Dispose Empty.**

Click the **Save** button to confirm the disposal.

For more, see the Tip Sheet at https://go.wisc.edu/l12rvp

There is no change to your current physical process of disposing of chemicals and chemical containers. Contact US&A with any chemical disposal questions.



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# ONE LAST RESOURCE…

- For additional functionality guidance, utilize the **Help** button (?) in the upper right-hand corner, which will open a new browser tab.
- On the tab, use the **Search** box in upper right-hand corner or search via topics in left-hand box.

Search

**Introduction**

RMM Help

Logging in to RMM

RMM User Interface

RMM Menu

Configuring User Options

**Researcher tasks**

**Inventory Management tasks**

Administrator tasks

Stockroom tasks

Waste Management

## Welcome to Research Material Management (RMM)

JAGGAER Research Material Management (RMM) is the industry-leading integrated solution for managing chemicals and other materials in research labs.

In addition to providing robust capabilities for the complete chemical management life cycle from sourcing through acquisition, receipt, tracking, and disposal, RMM is also the only solution to offer out-of-the-box integration with purchasing systems, to:

- Provide proactive visibility to hazardous materials before they arrive on site
- Deliver value to end users by simplifying and streamlining access to research materials
- Avoid cost and risk associated with redundant purchase of materials in inventory
- Optimize research spend and maximize key supplier relationships
- Manage access to hazardous materials as per Homeland Security and other regional regulatory requirements, AND
- Provide positive Return on Investment

RMM offers the option to integrate lab inventory with managed stock of consumables and lab supplies, operated internally and/or by vendors, to harmonize operations, streamline access, simplify EHS and financial reporting, and encourage utilization.

RMM is designed for integration with cheminformatics, lab notebooks, automation, and other research systems.

## What's New in RMM 22.1

RMM VERSION 22.1.0

# + QUESTIONS

Getting stuck is no joke. If you need help, have questions, or are not sure about something, email UW-Milwaukee Project Team at:

### safety-office@uwm.edu



Dr. Monroe Irkleman: Standup Chemist

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