



PROCURE-TO-PAY AUTOMATION PROJECT

ChemManager+

Your tool for ordering and managing chemicals

January 2023

+ RESOURCES & SUPPORT

Tip sheets 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 Tip sheets

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+ \(Tip sheet / Video \)](#)

Shop & Receive

- [Shop for Chemicals in ChemManager+ \(Tip sheet / Video \)](#)
- [Shop for Chemicals - Reorder from a Catalog in ChemManager+](#)
- [Receive Deliveries in ChemManager+ \(Tip sheet / Video \)](#)

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+ \(PI, EHS, and Recycling\)](#)



RESOURCES & SUPPORT

Your friendly, local US&A Staff

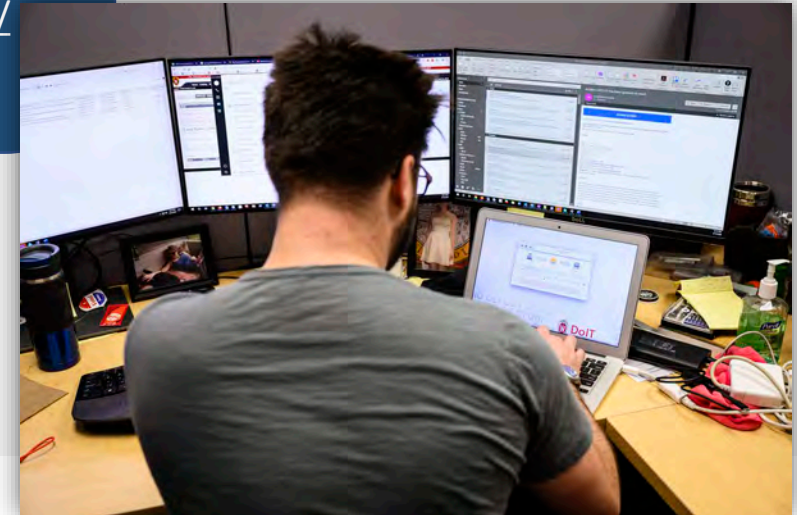
- safety-office@uwm.edu

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/>
- Videos and Demonstrations: <https://www.wisconsin.edu/ehs/osh/chemmanager/>



+ CONTAINERS TO UPLOAD

- Containers that shall be uploaded to ChemManager+:
 - Materials in manufacturer's original containers to manage inventory.
- Containers that do NOT need to be uploaded:
 - Materials in secondary containers (i.e., squirt bottles, reservoirs) and other containers (i.e., flasks, beakers) that are not manufacturer's containers.





+ DATA LOADER OVERVIEW

- Bulk uploads of containers with barcodes can be performed with the use of the Data Loader spreadsheet.
 - Legacy containers, Many container orders or transfers
- Roles
 - Users (Instructional and Research Faculty and Staff)
 - Input data on Container Data worksheet being careful to ensure data integrity
 - Create Materials when not already in ChemManager+
 - Submit Data Loader spreadsheet to US&A staff
 - US&A
 - Prepare and disseminate Data Loader to Users
 - Review spreadsheet for data integrity and work with Users for smooth data upload
 - Upload Data Loader to ChemManager+



+ USING THE DATA LOADER

- Save Data Loader spreadsheet as a local copy, if downloaded from a SharePoint file.
- The Data Loader spreadsheet will be used to input containers in bulk, most commonly from an existing inventory.
- Read Instructions prior to completing Container Data worksheet.
- The Materials CAS, Current Amount Units, Campus List, and Supplier List worksheets are locked. Do not alter this info to maintain spreadsheet functionality.
- Columns may be reordered to aid in data entry, but do NOT change column titles.
- **Some columns have a maximum character restriction. If enter too many characters, a prompt will appear to meet the requirement.**
NOTE: Dropdowns and restricted character cells are formatted through row 1000.



USING THE DATA LOADER

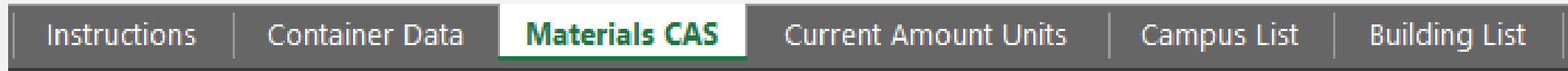
Container Data Worksheet

- Read row 1 instructions for each column prior to entering data.
- Observe which columns are **Required** and which ones are **Optional**.
- If an existing inventory is available, copy and paste the data from your inventory into the corresponding columns of this template.
- Check input data for data integrity based on instructions to ensure Data Loader will upload properly
- Each container should have a row in the Container Data worksheet



+ USING THE DATA LOADER

- In order to upload containers, the containers must be associated with a Material Profile. The Materials CAS worksheet contains a list of all Materials currently in ChemManager+ (at time of the Data Loader creation).



- The spreadsheet functionality will assist by trying to match the name and/or CAS of containers to these existing Materials. If a chemical name populates in the **SubstanceName** column, the container matches an existing Material in ChemManager+.
- Use CAS# whenever possible to help match to existing materials, especially for pure chemicals.
 - Do NOT change the auto-populated data in the SubstanceName column.



+ USING THE DATA LOADER

- When entering a CAS #, **SubstanceName** cells populate with a substance name from the Materials CAS worksheet.
 - This functionality is to aid in clean data for the upload.
- To utilize the cell functionality, be sure to enter CAS # with proper format using dashes. CAS Numbers are up to 10 digits long using the format **xxxxxxx-yy-z**. Column is formatted as Text to aid in maintaining this format.
 - "Substance," "Material," and "Chemical" are all used synonymously in Chem Manager+.

SubstanceName	CAS #
Acetone	67-64-1



+ USING THE DATA LOADER

- **Label Name** can also be used to populate **SubstanceName** cells with a substance name from the Materials CAS worksheet; *however*, the **Label Name** must be an exact match to the Common Name on the **Materials CAS** worksheet (no additional spaces).
 - For example, “formaldehyde solution” populates the SubstanceName and CAS. “Formaldehyde” does not populate the cells.

SubstanceName	CAS #	Label Name
Formaldehyde solution	50-00-0	formaldehyde solution
#N/A	#N/A	formaldehyde

+ USING THE DATA LOADER

- Chemical/container names can be pasted into **Label Name** field independent of the CAS # if desired to list a variation of the name.
 - This is the displayed name on the container label. This can include more details/information than SubstanceName field. E.g. "Acetone, HPLC Grade"

SubstanceName	CAS #	Label Name
Acetone	67-64-1	Acetone
Acetone	67-64-1	Acetone, HPLC Grade



+ USING THE DATA LOADER

- Many Materials have been uploaded to ChemManager+ since Data Loader creation.
 - Be sure to check for synonyms or aliases of Common Names.
- If a Material is not on the Data Loader Materials CAS tab, check ChemManager+ to see if the Material has been added.
 - Go to Tip Sheets at <https://uwservice.wisconsin.edu/administrati on/shopuw/#chem>
 - Follow steps on [Search and View Materials in ChemManager+](#) tip sheet

ShopUW+

Search Tipsheets



Choose a Category

Shopper Resources

Requester Resources

Approver Resources

ChemManager+

Purchasing / AP Resources

Searching and Reporting

Material Operations

- [Search and View Materials in ChemManager+](#)

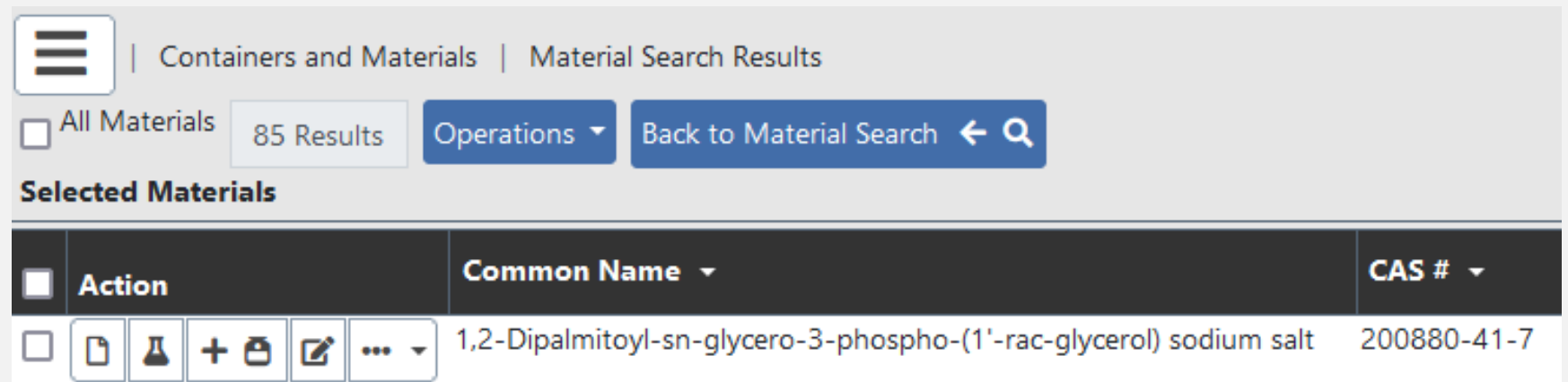
ShopUW+

PROCURE-TO-PAY AUTOMATION PROJECT
Working together to transform purchasing and payments across the UW System






+ USING THE DATA LOADER

- If a Material is present in ChemManager+, ensure the common name is an exact match to the SubstanceName entry on the Container Data worksheet.
 - TIP: Copy the name from ChemManager+ to paste into the Container Data worksheet
 - TIP: Entries are not case sensitive but are sensitive to extra spaces (will cause issues).

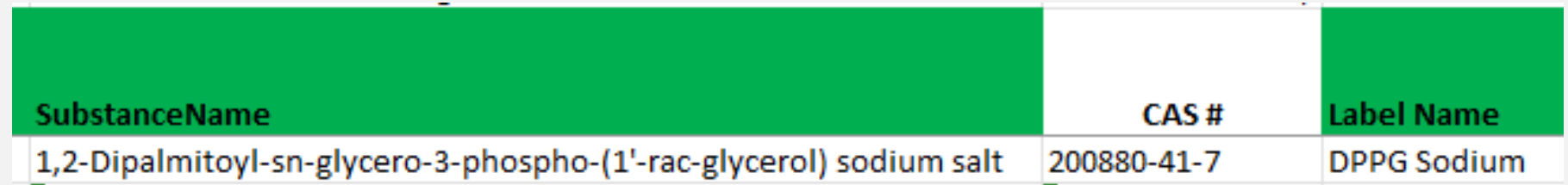
ChemManager+



The screenshot shows the ChemManager+ interface. At the top, there is a navigation bar with a hamburger menu icon, the text "Containers and Materials | Material Search Results", and a search bar containing "All Materials" and "85 Results". Below the search bar are buttons for "Operations" and "Back to Material Search". The main content area is titled "Selected Materials" and contains a table with the following data:

<input type="checkbox"/>	Action	Common Name	CAS #
<input type="checkbox"/>	    	1,2-Dipalmitoyl-sn-glycero-3-phospho-(1'-rac-glycerol) sodium salt	200880-41-7

Container Data
Worksheet

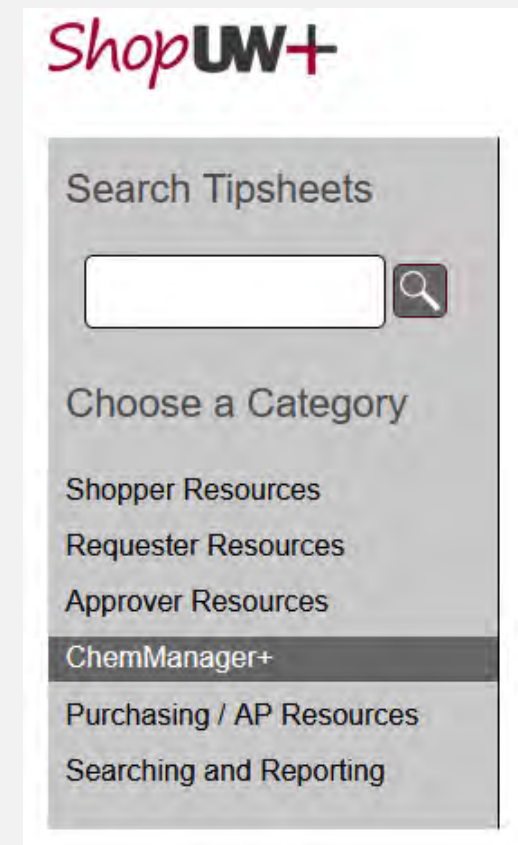


The screenshot shows a portion of a spreadsheet with a green header row and one data row. The data row contains the following information:

SubstanceName	CAS #	Label Name
1,2-Dipalmitoyl-sn-glycero-3-phospho-(1'-rac-glycerol) sodium salt	200880-41-7	DPPG Sodium

+ USING THE DATA LOADER

- If a Material is NOT in the Data Loader or ChemManager+, a new material needs to be created.
 - Go to Tip Sheets at <https://uwservice.wisconsin.edu/administrati on/shopuw/#chem>
 - Follow steps on [Create Materials in ChemManager+ \(PI, Lab Manager, and EHS Manager\)](#) tip sheet
 - Only Users with role of PI, Lab Manager, and EHS Manager can create Materials in ChemManager+
 - Enter Name as clean, proper name. E.g. "Acetone" not "Acetone, ACS"
 - Enter info into as many fields as possible from resources such as Safety Data Sheets



ShopUW+

Search Tipsheets

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+ USING THE DATA LOADER

- **Current Amount:** Enter container size rather than actual amount of chemical in the container.
- **Current Amount Units** must match one of the units on the "Current Amount Units" worksheet. Use the dropdown list in the cells to enter.

Current Amount	Current Amount Units	Ma
50	ML	

Following are the unit values that are installed with RMM. New unit values are **not** able to be added and existing values may **not** be removed via the RMM user interface.

- AMP
- AMPOULE
- AMPS
- AMPULE
- AMPULS
- ASSAYS

Instructions | Container Data | Materials CAS | **Current Amount Units** | Campus List | Building List



+ USING THE DATA LOADER

- **Manufacturer Name:** Optional, but required if associating to proper SDS.
- **Manufacturer Part #:** Optional, but required if associating to proper SDS.

Manufacturer Name	Manufacturer Part #
SIGMA	00363CC

- **Owner:** Needs to be Empl ID of container owner. Need leading 0's, so format column as Text not number or place an apostrophe in front of 0's

Owner
01234567

+ USING THE DATA LOADER

- **Site** utilizes drop down boxes to aid in populating the cells.
- **Building, Floor, Room, and Sublocation** must match an existing entry in ChemManager+.
 - To look up exact match location data, search entries in your Preferred Search Locations or Alternate Container Locations using silhouette in upper right corner
 - To list multiple **Sublocation** levels, place ">" between the level names

Required. Must match existing site e.g. UWMSN	Required. Must match existing Building	Required. Must match existing floor	Required. Must match existing room	Optional. Must match existing sublocation (use > to add multiple levels)
Site	Building	Floor	Room	Sublocation
UWEAU				
UWGBY				
UWLAC				
UWMIL				
UWMSN				
UWOSH				
UWPKS				
UWPLT				

UWMIL>Lapham Hall>3>W319
UWMIL>Lapham Hall>3>W319B
UWMIL>Lapham Hall>3>W319C

- User Preferences
- Preferred Search Locations
- Alternate Container Locations
- Receiving Search Locations
- Manage Sub-locations
- Logout

+ USING THE DATA LOADER

- **Supplier Name:** Supplier where chemical was purchased through, not necessarily the brand/manufacturer.
 - Use "Legacy" when uploading existing inventory in a lab.
 - Cells set to Legacy as default.
 - If entering a Supplier for an upload other than existing inventory, select a Supplier from the drop-down list.
- For other **Optional** data columns, follow the instructions in row 1 to ensure data integrity.

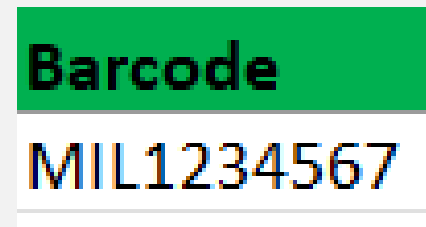
	Supplier Name	Catalog
	Legacy	
	Legacy	
	Legacy	
	20 Mule Team	
	3M	
	A.D. Mackay Inc.	
	AAPER Alcohol	
	Aaron Brands	
	Abcam Inc	
	Accela ChemBio Inc.	



+ USING THE DATA LOADER

Once all data is entered into the Container Data worksheet, input barcodes that correlate with each container.

- **Barcode:** Type or scan the pre-printed barcode from the container that corresponds with each row.
 - If scanning multiple container barcodes at once, be sure the containers are in same order as data on the worksheet.
 - As you scan barcodes, the cursor will automatically move down the column to the next row.





+ USING THE DATA LOADER

- When finished inputting data into the spreadsheet, it needs to be prepared for upload.
 - A. Select the **Container Data** worksheet as the active worksheet when saving the file. **This step will be critical to perform data upload function.**
 - B. Delete any "**#N/A**" and "**Legacy**" in columns that are below rows that do not have container information.
 - C. Delete **row 1** to remove instructions and **CAS # column** to remove.
 - D. Save file as a CSV (Comma delimited) (.csv).
- Once the file is saved, send the file to safety-office@uwm.edu for upload.

+ QUESTIONS

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

safety-office@uwm.edu

