SunRISE
Chemical Manager Training
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Introduction

The purpose of this training guide is to familiarize users with SunRISE Chemical Manager. It is important to note that much of “how” the application is used is dictated by the business practices of Arizona State University.

The document is organized according to the major functions of the SunRISE Chemical Manager application:

- Module 1: Locations and Projects (standard setup activity …building the foundation for the system)
- Module 2: Integration with HigherMarkets (searching for chemicals via the Search tool and performing inventory actions to chemical containers)
- Module 3: Chemical Management (performing inventory actions, creating new chemicals and containers, and performing detailed chemical searches)
- Module 4: Data Import and Reports

Each major functional area includes one or more training exercises. The following information is provided for each exercise:

<table>
<thead>
<tr>
<th>Exercise</th>
<th>Objective</th>
<th>User Role</th>
<th>Steps</th>
<th>Your Task</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Name of the exercise</td>
<td>Description of who will normally perform the exercise</td>
<td>List of steps to execute the Exercise</td>
<td>The training participant’s task related to this exercise</td>
</tr>
</tbody>
</table>
Module 1: Managing Locations, Access Groups and Projects

Location Management consists of locations, location access groups and projects which are maintained by the SunRISE System Administrator. These entities work together to determine the structure of your inventory functions and to determine who has access to “what.” You, as the user, need to understand the locations, access groups and projects to be able to inform the System Administrator of your needs.

Setting up Locations

Locations provide a tree structure that defines where chemicals are stored. Depending on the type of setup established, this can be a very detailed, granular location structure (Building, floor, lab, room, cabinet, shelf) or a simple structure. Each lab will be able to decide how they want their locations set up.

Location Access Groups

Location Access Groups provide a way to group related locations so that user assignment is made easier. For example, instead of assigning a user access to a building and each of its individual rooms, shelves, freezers, etc… you can simply assign the user to the “Biodesign” access group.
Projects

Projects are an additional way of adding security to the Chemical Manager Project. Although a user may have the ability to view inventory in a location through location access, project access is required for the user to perform any container actions to the inventory in the location.

Important: Projects are not associated with locations. Projects are instead, used in combination with location access groups to grant user rights in the system.

Assigning Locations, Projects, and Permissions to Users

Creating locations, location access groups, and projects are all considered setup work. To make use of these entities, users must be assigned the appropriate location access groups and projects. These assignments determine which locations they can search for chemicals and which locations they have access to chemicals for inventory actions.

Lesson Wrap-Up

The focus on this lesson was setup activity. Locations, location access groups, and projects serve as the foundation for how your Chemical Manager system will work for you. Although most of this is set up during initial implementation, the management of these items are ongoing by the System Administrator and can expand on as needed.
Module 2: Chemical Search

The Exercises in this lesson demonstrate:

- Searching for chemicals from Internal Campus Inventory
- Searching for chemicals from stores/supplies inventory
- Searching for chemicals from an external supplier
- Searching for chemicals by formula
- Searching for chemicals by molecular structure
- Performing detailed chemicals search

Chemical Manager can be used to order chemicals from your stockrooms. By using the HigherMarkets Search, you can see if a chemical is available in a stockroom, where the current containers of chemicals are located, and information about previous chemical orders.

Search for Chemicals within Internal Stockrooms

Exercise 1

Step 1. Login

Exercise Search for chemicals through HigherMarkets Search

Objective To search for chemicals that are located within internal stockrooms to determine availability

User Role Standard user

Steps

1. Login to the system.

2. Go to Search Tools → Product Search. The standard HigherMarkets search screen displays. This screen is used to search for internal or external items, including chemicals.
3. Enter Ethyl Alcohol in the *must include the words* field. Click **Search** to display the results.

4. Click **Accessible Containers**. Click on the drop down menu under **Available Actions**. Select **History** to view **Container Details**. Close the secondary windows.
Step 5. Search for Chemical Inventory

Another option to search for Chemical Inventory

5. Search for all items available through Chemical Inventory. Enter **Chemical Inventory** in the **Supplier** field and click **Search**. Hundreds of items display.

My Notes:
Search for Chemicals from Stores

Exercise 2
Step 3. Search for Acetone

Exercise
Search for chemicals through HigherMarkets Search

Objective
To search for chemicals that need to be ordered from stores/supplies inventory

User Role
Standard user

Steps
1. Login to the system.
2. Go to Search Tools → Product Search. The standard HigherMarkets search screen displays. This screen is used to search for internal items, including chemicals.
3. Enter Acetone in the must include the words field. Click Search to display the results.
4. Review the results: Chemicals that exist in a location (ie –have a container assigned) display first in the results. From there, Stores/Supplies Inventory display, then items from external suppliers display next.
5. In the first row of the results, click on the container icon. Review the tabs on the screen.
   a. Accessible Containers tab i.e. Internal Campus Inventory
   b. Order from Inventory tab i.e. Stores/Supplies Inventory
   c. Purchase Externally tab
6. Request 100 g of Acetone from stores/supplies inventory. To do this, go to the Order from Inventory tab and enter 100 g, then click the Add to
Cart button. Notice how the item displays in your cart. From there, it can be processed normally. Close the secondary window.

My Notes:
Exercise 3

Search for Chemicals from an External Supplier

Exercise | Search for chemicals through HigherMarkets Search
Objective | To search for chemicals that need to be ordered from an external supplier
User Role | Standard user
Steps

1. **Login** to the system.

2. Go to Search Tools → **Product Search**. The standard HigherMarkets search screen displays. This screen is used to search for external items, including chemicals.

3. Enter **Ethyl Alcohol** in the **must include the words** field. Click **Search** to display the results.

4. Select an item from an external supplier. To do this, **check a box** of one of the items listed that has a shopping cart. Notice how the item displays in your cart. From there, it can be processed normally. Close the secondary window.

5. Instructor demonstration: Using **Vinylbenzyl** as an example, review the **Purchase Externally** tab.

**Notice how you can perform inventory actions from this screen. We will perform these actions from another part of the system, but you can also perform these same functions from here.**
Users must download CS ChemDraw Active X onto their computer to search for a chemical by formula. Refer to the steps below to search for chemicals using the Structure Searching feature.

*My Notes:*
Search for Chemicals by Formula.

Exercise 4

Step 2 & 3. Search Tools

Exercise
Search for chemicals through HigherMarkets Search

Objective
To search for chemicals by Formula that needs to be ordered – either from chemical inventory or from an external supplier

User Role
Standard user

Steps
1. Login to the system.
2. Select the Search Tools menu from your home page.
3. Select Chemicals under Other Searches
4. Install CS ChemDraw Active X onto your computer if you do not already have this program
5. Type in any partial information into the Molecular Formula field (note it is not necessary in the product search to place an asterisk before or after the partial description).

Search for Chemicals by Molecular Structure

(Step 5)
Step 6. Search Results

6. Click **Search**. Results will be returned. Note: If the item exists in Chemical Inventory the Inventory item will show in the results as the #1 item.

**My Notes:**

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**Search for Chemicals by Molecular Structure**

Users must download CS ChemDraw Active X onto their computer to search for a chemical by molecular structure. Refer to the steps below to search for chemicals using the Structure Searching feature: Search for chemicals by molecular structure.

**Exercise 5**

**Step 2 & 3. Search Tools / Other Searches**

<table>
<thead>
<tr>
<th>Exercise</th>
<th>Search for chemicals through HigherMarkets Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>To search for chemicals by Molecular Structure that needs to be ordered – either from chemical inventory or from an external supplier</td>
</tr>
<tr>
<td>User Role</td>
<td>Standard user</td>
</tr>
<tr>
<td>Steps</td>
<td>1. <strong>Login</strong> to the system.</td>
</tr>
<tr>
<td></td>
<td>2. Select the <strong>Search Tools</strong> menu from your home page.</td>
</tr>
<tr>
<td></td>
<td>3. Select Chemicals under Other Searches</td>
</tr>
<tr>
<td></td>
<td>4. Install CS ChemDraw Active X onto your computer if you do not already have this program by right clicking “Chemical ReSource”.</td>
</tr>
</tbody>
</table>
Step 5. Use toolbar to draw in window

5. **Edit-Paste** the molecular structure into the **Drawing Window**.

Click **Search**. Results will be returned. Note: If the item exists in Chemical Inventory the Inventory item will show in the results as the #1 item.

*My Notes:*
Performing Chemical Search with Inventory Query

The Inventory Query allows you to perform detailed chemical searches to find both chemical records and containers. Through the query tool, you can search for chemicals by many different types of criteria ranging from purity, chemical name, and CAS number. Important tips:

- The search results display the Chemical Records. If you already know the container ID (barcode), you may want to use the inventory actions function instead.
- To clear a search, simply click the Chemical button on the left side of the window.

Performing detailed chemicals search.

Exercise 6

Step 2. Inventory Query

Objective
Perform Inventory Searches
To use the Inventory Query tool to perform searches for chemicals

User Role
Standard user

Steps
1. **Login** to the system.
2. Go to Inventory \(\rightarrow\) **Inventory Query**. Select **Chemical** as the item type (button on the left side of the search screen).
3. View all chemicals in the system:
   a. Leave all fields empty and click **Search**.
   b. Approximately 30 chemical records display. Chemicals with associated containers are indicated by the container icon. By clicking on one of these icons, you can perform inventory actions similar to in the last lesson. To close the secondary window, click **Close**
4. Perform partial search:
   a. Click the + sign to the left of the **Chemical Properties** label. The Search screen repens.
   b. In the **Chemical Name** field, enter *eth* (* is treated as a wildcard in the search), then click **Search**. All
Step 4b. Using wildcard to search for *eth*

chemical records with the letters eth in the name will display. For example, Ethanol, Ethyl Alcohol, etc.

Step 4b. Search Results for *eth*

5. Perform a search with container criteria:
   a. Click the + sign to the left of the Chemical Properties label. The Search screen re-opens. Make sure that the previous search criteria is removed.
   b. Click the + sign to the left of the Container Details label.
   c. Fill in any of the container criteria fields and click Search.

Note: We will discuss each of the query criteria fields and how they determine the results of the search.

Step 5b. Container Details

Step 5b. Search Results
My Notes:

Lesson Wrap-up
The focus on this lesson was integration between HigherMarkets purchasing and Chemical Manager. The HigherMarkets Search can be used to perform a number of inventory actions, along with locating and ordering chemicals.
Module 3: Chemical Management
The inventory navigation tab in HigherMarkets contains the primary day-to-day functions related to chemical management. These include functions found under the inventory query, items, and inventory actions buttons.
The Exercises in this lesson demonstrate:

- Manually creating a new container
- Adding chemical records via HigherMarkets
- Creating, Assigning, and Approving Chemical Records in the system
- Performing inventory functions to a single container
- Performing inventory functions to multiple containers

**Manually Creating New Containers**
After locating a chemical through the Inventory Query tool or via HigherMarkets Search, you can manually add a container for the chemical. In many cases, chemical containers will be added via the bulk process, but you can also add this information on an as-needed basis.

Note: Containers can also be added when items are added into inventory from HigherMarkets POs.
Manually creating a new container.

**Exercise 7**

**Step 2. Inventory Query**

- **Exercise**: Create a New Container
- **Objective**: To create a new chemical container for an existing chemical record
- **User Role**: Standard user
- **Steps**
  1. **Login** to the system.
  2. Go to Inventory → **Inventory Query**. Select Chemical Properties and select Chemical as the item type (button on the left side of the search screen).
  3. Enter **Ethyl Alcohol** in the Chemical Name field and click Search. The ethyl alcohol chemical record displays.

Step 3. Ethyl alcohol chemical record
4. Click on the chemical name (in bold blue text). A detailed secondary window displays.

5. From this window, select Create New Containers from the drop-down list box, then click Go. Another window displays.

6. Enter the container data. It is mandatory to fill-in all bold (required) fields.) As a class, we will walk through each of the fields.

7. When the container data is filled out, click Confirm New, then Close. The new container is created.

8. To verify the container is created, perform the same search and verify the container exists for the chemical record.

My Notes:
Chemical Records can be added to the system a number of ways. One of these is by creating container(s) from chemicals ordered through HigherMarkets. After items have been ordered via HigherMarkets and received, oftentimes users will want to add the product into the system. To do this, you must match it with an existing chemical or create a new one, then create a container for the item.

**Adding Chemical Records from HigherMarkets.**

**Exercise 8**

**Step 2.** Order History Tab

**Step 3.** Add to Inventory icon

**Step 4.** Search Inventory Records

**Exercise** Adding Chemical Records from HigherMarkets

**Objective** To create a container from a chemical that has been ordered and received via HigherMarkets.

**User Role** Standard user

**Steps**

This is an instructor demonstrated exercise. Please follow along, but do not perform these steps.

1. **Login** to the system.

2. Go to requisitions → **Order History** to begin your PO search. Using the criteria, locate the PO .

3. Once the PO is open, locate the item, and click the **Add to Inventory** icon.

4. Match the inventory item to a chemical record: To do this, first click the **Search Inventory Records** button. If a match displays, select it and continue to the next step. If a match does not display, click **Create Chemical Item** and continue from there.

5. After the matching chemical record exists, create a container for the item: Enter the required data, then click **Save Container**. The container will immediately be available in inventory searches and will be available the next day through HigherMarkets search.
Adding Chemicals to the System
SciQuest Chemical Manager provides granular permissions in terms of creating chemical records in the systems. Users may be able to perform the following functions:
  o Creating single chemical records
  o Creating bulk chemical records
  o Assigning new chemical records for approval
  o Approving chemical records.

By default, a chemical record, or sample, must be approved before a container can be associated to the chemical. In some cases, chemical records are created and do not have associated containers. In other cases, the chemical record will be created at the same time as the container.

Depending on how your business functions, your users may be able to perform all the functions above (enter an approve chemicals), or you may breakdown user roles to allow these functions. For training purposes, the role used is allowed to perform all tasks related to chemical records.

Create a New Chemical Record.

Exercise 9

Step 2. Create New Item

Exercise: Create a new chemical record
Objective: To create a new chemical record that will be assigned and approved.
User Role: Standard user
Steps
1. Login to the system.
2. Go to Inventory Æ Items Æ Create New Item.
3. From the Create Item Records screen, select the Chemical icon.
4. Click the Next button (because we are entering the chemical data manually),
5. Enter the Chemical Properties.
   a. This is a free-form exercise, so enter whatever chemical you would like. Select/enter as many fields as possible.
   b. Click the Next button when you have entered all the data.
   c. Select Chemical as the item type (button on the left side of the search screen).

6. Enter any additional information about the chemical in the Related Information, Hazards, and Item Creator's Profile tabs.
   a. Leave all fields empty and click Search.
   b. Approximately 30 chemical records display. Chemicals with associated containers are indicated by the container icon. By clicking on one of these icons, you can perform inventory actions similar to in the last lesson.

7. From the top of the window, make sure that Draft is selected and click the Save button. The item should now show up in My Item History.
Approve a Chemical that has been Added to the System.

Exercise 10
Step 1. My Items Screen

Step 3. Approved from drop down

Step 4. Inventory Query to locate new chemical

Exercise
Approve a Draft Chemical

Objective
To approve a chemical that has been added to the system, but not approved for use.

User Role
Standard user

Steps
continued from previous exercise...
1. From the my items screen, select the Item # for the chemical that you just added. The chemical records displays.
2. Update and review the record as necessary.
3. When you finish, select Approved from the drop-down at the top of the window, then click Save. The new chemical record is now available in the system.
4. Perform a search through Inventory Query to locate the new chemical. Notice that the chemical does not have a container assigned at this point.

My Notes:
Perform Inventory Actions from HigherMarkets Search

Inventory actions, such as disposal, correcting quantities, etc. can be performed a number of ways in the system. One way is through HigherMarkets search. In this exercise, we will perform one action on a chemical container as an example of the many actions that can be performed.

Perform an Inventory Action to a Single Container

Exercise 11

Step 4. Results from Water Search

Exercise
Perform Inventory Actions from HigherMarkets Search

Objective
To update the quantity of a chemical container accessed from the HigherMarkets Search

User
Standard user

Role
Standard user

Steps
1. Login to the system.
2. Go to Search Tools → Product Search. The standard HigherMarkets search screen displays.
3. Enter Water in the must include the words field. Click Search to display the results.
4. Select the first item (Water from Chemical Inventory) by clicking on the container icon. The secondary window displays.
5. From the Accessible Actions tab, locate the appropriate container (instructor will provide during class). Select Correct Amount/Quantity from the drop-down list box.
6. Populate the secondary window that displays:
   a. Select the Correction Reason from the drop-down list box. (Note: Additional list options may be added by those with the appropriate permissions).
Step 6. Correction Information and confirm correction

b. Enter the new **quantity** (reduce the quantity by two gallons).

c. Click the **Confirm Correction** button to save the changes.

7. Click the Close button on the secondary window. The adjustment is complete.

Write down the Barcode for the item that you modified, along with the quantity adjustment that was made (For example, from 18 to 17 gallons)

______________________________

**My Notes:**
Performing Inventory Actions on Multiple Containers

Through Chemical Manager, you can perform a number of actions to containers. The graphic below provides a list of possible options:

These actions can be performed to a single container or to multiple containers simultaneously. Because the processes are so similar, we will focus on bulk changes in the following exercise.

Important Note: Each of the inventory actions available have an associated permission that can be viewed through a user’s profile. Some users may be able to perform some of the tasks, but not all of them – disposal for example.
**Change the Location for Multiple Containers**

**Exercise 12**

**Step 2. Inventory Actions**

- **Exercise**: Change the location for multiple containers
- **Objective**: To demonstrate inventory action functions on multiple containers.
- **User Role**: Standard user
- **Steps**
  1. **Login** to the system.
  2. Go to **Inventory ➔ Inventory Actions** on the left side of the screen.
  3. From the Perform Inventory Actions screen, select the **(Bulk) Barcodes Only** tab. This screen is used to manually enter the containers to be modified or to upload a file containing a list of containers.
  4. Enter the first barcode, then click **Add to List**, then enter the second barcode and click **Add to List** again. For this exercise, you will use the appropriate barcodes for the Water and Acetic Acid samples. For example, WTR001 and AA001. (Depending on your training number, the barcode will vary, but the initial numbers remain the same).
  5. Select **Reassign** from the drop-down list box, then click the **Go** button. Notice how the list of inventory actions is limited for bulk changes.
  6. Enter the changes on the screen:
     a. Select **Moved Lab** as the **Reassignment Reason**
     b. Click the **Select Location** button and locate and select the new location that you created earlier in the training session.
c. Click **Confirm Location**.

d. Click Confirm Reassignment.

Note: If you encounter an error (yellow highlights), make the changes suggested and click Save.

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*My Notes:*

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*Lesson Wrap-up*

The focus on this lesson was to demonstrate day-to-day tasks related to Chemical Management. The Inventory tab on the Desktop is the primary location for such activity. From this location, you can, create chemical records and containers, and much more.
Basic SunRISE Chemical Manager Definitions

SunRISE is the unique name given to the Arizona State University Research Enhancement System. The software company for SunRISE is SciQUEST. The terms SunRISE, E-Commerce, E-Purchasing, On-Line Shopping, Web-Based Shopping, Higher Markets and SciQuest are all synonymous.

Current Cart is the term used within the SunRISE system for a requisition in progress. Each supplier within the system might use different terminology for the same function. Some examples are Request, Current Cart, Shopping Basket, Requisition and Current Order. Whichever term is used, all are means for bringing items from a specific supplier back into the SunRISE system to create a requisition and subsequently a purchase order.

Punch Out Catalogs are suppliers that maintain their own web pages, while allowing end users access through SunRISE. Punch Out Catalogs may also be referred to as On-Line Catalogs, Web Catalogs or by the supplier name, i.e. Fisher, VWR, Spectrum, etc.

Error Messages in SunRISE will appear in yellow highlight and direct the user to incomplete or incorrect information.

Web Catalogs or “Punch out” catalogs

- These are online shopping catalogs that when elected, take the user into the supplier’s website and online catalog. Two examples are VWR and Fisher (see main pages for these supplier’s at right).

- All browsing, shopping, real-time inventory lookup and pricing are done from the supplier’s website and their catalog.

- When finished shopping and putting items into a shipping cart, all information is automatically transferred back to SunRISE for requisitioning, approving, and creating a purchase order.

Hosted Catalogs

- In cases where suppliers do not have their own Web page or online catalog, the University may work with the supplier to list their products and prices as a Hosted Catalog.

- Hosted Catalogs will be listed under each commodity group. Click browse by supplier then choose hosted catalog suppliers from the “show types” field. A list of the hosted suppliers will appear.

User Profile your default user information. Accounting code and shipping default for all requisitions. Information can be changed at any time in the User Profile screen.
**Requisition Header** information associated with an entire requisition. Accounting code and shipping information for individual requisitions. Information can be changed at the time a requisition is created. Information may be changed before or after line items are added to the requisition.

**Line Item** information associated with a single item within a requisition. Accounting code per line item within a requisition. Information can be changed at the time a requisition is created. Information must be entered **AFTER** items are added to the requisition.

**Funding Approval** Determined by Advantage Account Number chosen.

**Dollar Approvals** All items in SunRISE are under contract or pricing agreement. Any approvals required are established in your User Profile.

**Property Control** Each requisition containing Capital Property codes is forwarded to Property Control for coding purposes.

**Internal Campus Inventory** Chemical inventory located within the campus labs and stockrooms that you have access to view and purchase from

**Stores/Supplies Inventory** Lab Stores Inventory
CONGRATULATIONS!

You are now ready to use

SunRISE Chemical Manager Module

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