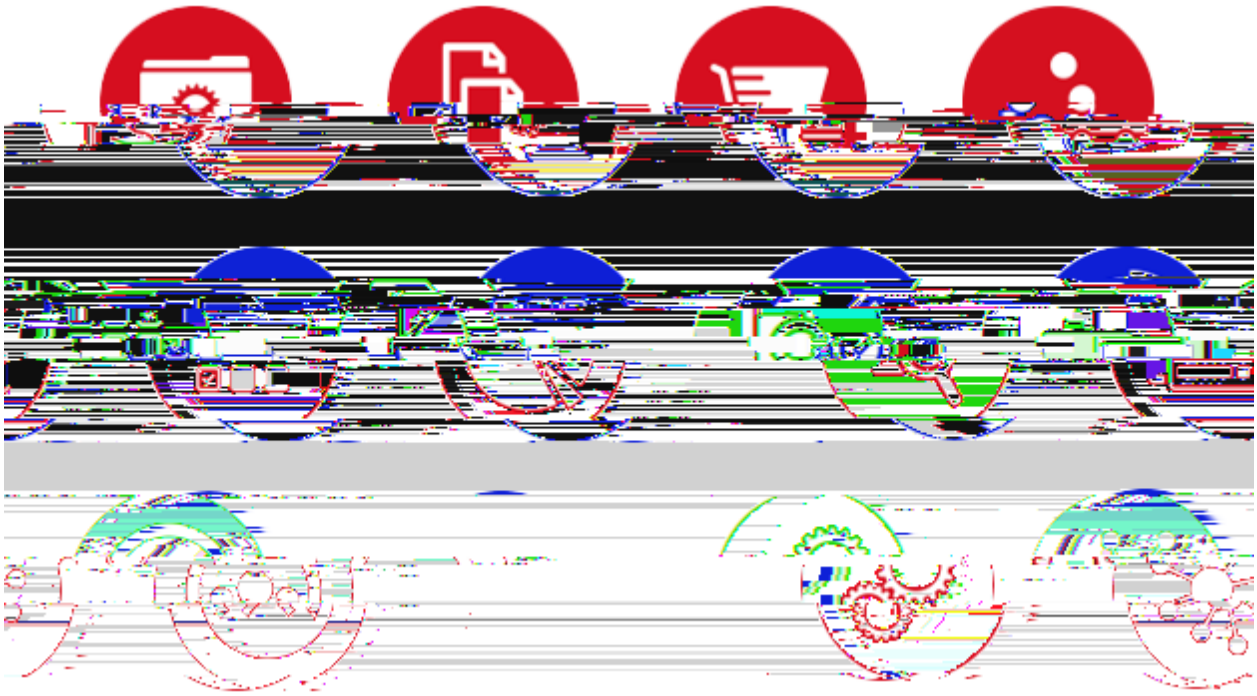
22.2 RELEASE NOTES

FOR RESEARCH MATERIAL MANAGEMENT

16 DECEMBER 2022



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In addition:

- inventory associated with specific projects
- Request approval authority can be limited to the PI associated with the request, and
- Delegates can perform permitted actions on behalf of the PI, including managing PI/Project

In addition to managing access based on PI/Project association, organizations (departments) can also identify Lab Managers who manage access and inventory for the physical labs associated with a department:

- Rooms can be associated to organizations (departments)

RMM BIOREAGENTS - EXPANDED SEARCH AND REQUEST

- Catalog Number
- Bar Code
- Brand Name
- Manufacturer Part Number
- Unit/Amount
- Flex fields

Inventory Result Actions

For each inventory Container)

than 20, none of the **C** SKU's will be displayed for the user. However, if the CiteAb product returns 30 matches from eMolecules but each match has 1 single catalog item and 1 price, then only 20 matches will be displayed from eMolecules on that CiteAb product's matching results.

For more details on the match scoring process, please read the Matching Catalog and Inventory Items to CiteAb Items later in this document.

eMolecules Result Fields

Each eMolecules result for a CiteAb product will show (where available):

- Product Name
- Supplier
- Catalog Number
- Brand Name
- Manufacturer Part Number
- Unit / Amount
- Price and Currency
- Shipping speed / description

eMolecules Result Actions

For each eMolecules item, a researcher can View Details ( ), or add the item to the shopping cart

( ) .

Once an eMolecules item has been placed in the Shopping Cart, the shopping cart icon for the selected eMolecules item is updated, as is the CiteAb product (shown below).

Matching Catalog and Inventory Items to CiteAb Items

CiteAb products are matched to Hosted Catalog Items, eMoclecules Catalog Items, and Inventory items based on reaching a similarity threshold. The similarity calculation (**SC**) differs depending on the information provided by the supplier on the item. Items that have a **SC** below the threshold will not be displayed. For those items above the threshold, the twenty items with the top **SC** will be displayed in descending order of match score.

JAGGAER expects that match scoring will be adjusted and refined based on experience with the Search and Request feature in production use and based on client feedback.

In the following scoring calculation description:

- Brand Name refers to Hosted Catalog Brand Name, eMolecules Brand Name, or Container Brand
- Manufacturer Part # refers to Hosted Catalog Manufacturer Part #, eMolecules Manufacturer Part #, or Container Manufacturer Part #
- *Catalog* # refers to Hosted Catalog #, eMolecules Catalog #, or Container Catalog #
- *Supplier* refers to Hosted Catalog Supplier, eMolecules Supplier, or Container Supplier
-

The following table summarizes the above description

CiteAb Product	Catalog or Inventory Item	Match Weight with Brand	

ADVADVADVADV ACCESS MANAGEME1 0NT624 FF1 OR

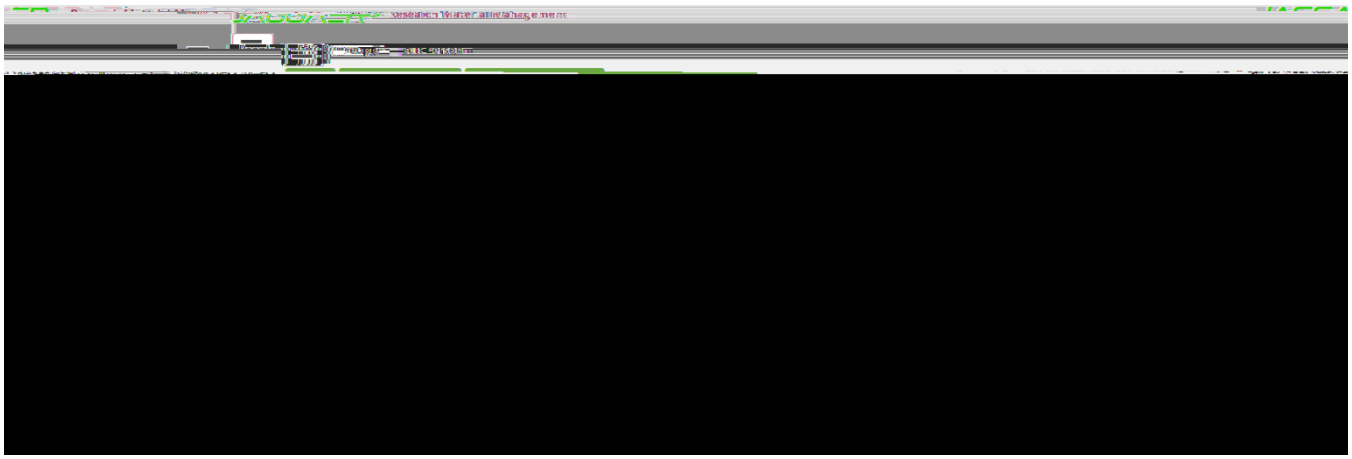
Principal Investigator Designation

- Feature Activation: This feature is **Off** by default
- New Permissions related to this Feature: **None**
- New Notifications related to this Feature: **None**

This feature is intended for use by: Researchers

Accessed Via: Administration | People | People Search | Edit Person

The Edit Person page (shown below) has been updated to allow users to be designated as a Principal Investigator. Note: Currently A person can only be assigned the PI designation via the Edit Person page not via APIs or the RMM Data Loader.



Edit Person Page

If a person has been designated as a Principal Investigator and they have people assigned to them or own projects, they cannot be changed to **not** be a Principal Investigator until those relationships have been resolved.

Principal Investigator - Assign Users

- Feature Activation: This feature is **Off** by default
- New Permissions related to this Feature: **People Assign People to My Principal Investigator**
  People Assign People to All Principal Investigators
- New Notifications related to this Feature: **None**

This feature is intended for use by: Principal Investigators and their Delegates

Accessed Via: Administration | People | Assign Users to Principal Investigator

An RMM user can be associated to one or more Principal Investigators.

- Users associated with a PI can access project-restricted inventory in any project owned by the PI, including in other organization (department) restricted labs
- Unless authorized, users associated with a Principal Investigator do not see list-controlled or user reserved containers

Users with at least one of the new permissions, ***People Assign People to My Principal Investigator*** or ***People Assign People to All Principal Investigators*****,** can access the Assign Users to Principal Investigator window (shown below). On upgrade, the ***People Assign People to All Principal Investigators*** permission will be assigned to any user with the ***People Manage Projects and Assign*** **People** permission.

Assign Users

Principal Investigator Projects

- Feature Activation: This feature is **Off** by default
- New Permissions related to this Feature: **People Manage My Projects and Assign People**
- New Notifications related to this Feature: **None**

- Can access project-restricted containers in any project owned by the Principal Investigator
- Cannot see List-Controlled or Owner-reserved containers if they are not separately authorized

Project Access Rules

When accessing the Projects page, the following rules apply:

- A user with the **People Manage All Projects and Assign People** permission
  - Can see **all** projects
  - Can create new projects and assign them to a Principal Investigator
- A user with the **People Manage My Manage**

Principal Investigator - Container Search

- Feature Activation: This feature is **On** by default
- New Permissions related to this Feature: **None**
- New Notifications related to this Feature: **None**

This feature is intended for use by: Researchers and Administrators

Accessed Via: RMM | Containers and Materials | Container Search

With the introduction of Principal Investigator (PI), Container Search (shown below) has been enhanced to allow a user to search by Principal Investigator. When searching by Principal Investigator, only containers that are associated to projects owned by the selected PI

Principal Investigator Approvals

Overview

In previous releases, each Approval Type (e.g., New Material, Type In) could be designated to be approved by 1) anyone with the relevant approval type permission or 2) anyone with the relevant permission **AND** who belongs to the same organization as the creator of the shopping cart.

RMM 22.2 introduces **P**

View Approvers

- Feature Activation: This feature is **On** by default
- New Permissions related to this Feature: **None**
- New Notifications related to this Feature: **None**

This feature is intended for use by: Researchers and Administrators

Accessed Via: RMM | Review and Approve | View Approvers

With the introduction of the concept of approval by Principal Investigator, the RMM View Approvers page (shown below) has been modified. For an RMM request that requires the Approval Type **Principal Investigator** approval, user can easily see the Principal Investigators and their Delegates that have permission for the approval.

View Approvers Page

If the Approved By for the selected Approval Type is **Principal Investigator**,

This feature is intended for use by: RMM Users with the Authority to Approve Items

Accessed Via: RMM | Review and Approve | Open Approval Items

With regards to (pictured below) has been modified as detailed below.

Open Approvals Page

Item I Can Approve Filter

The View Open Approvals page has a now take Principal Investigator into consideration. If an item is designated to be approved by Principal Investigator, I Can only show that item if the logged in use is the Principal Investigator, or their Delegates, associated to the approval.

Approvals Report

(shown below) has been enhanced to accept Principal Investigator as a report criterion. Additionally, the Approvals Report has an additional column to show the Principal Investigator when one has been assigned to the approval.

Approvals Report

Organizations Room Assignments

Organizations - Lab Manager Designation

- Feature Activation: This feature is **On** by default
- New Permissions related to this Feature: **None**

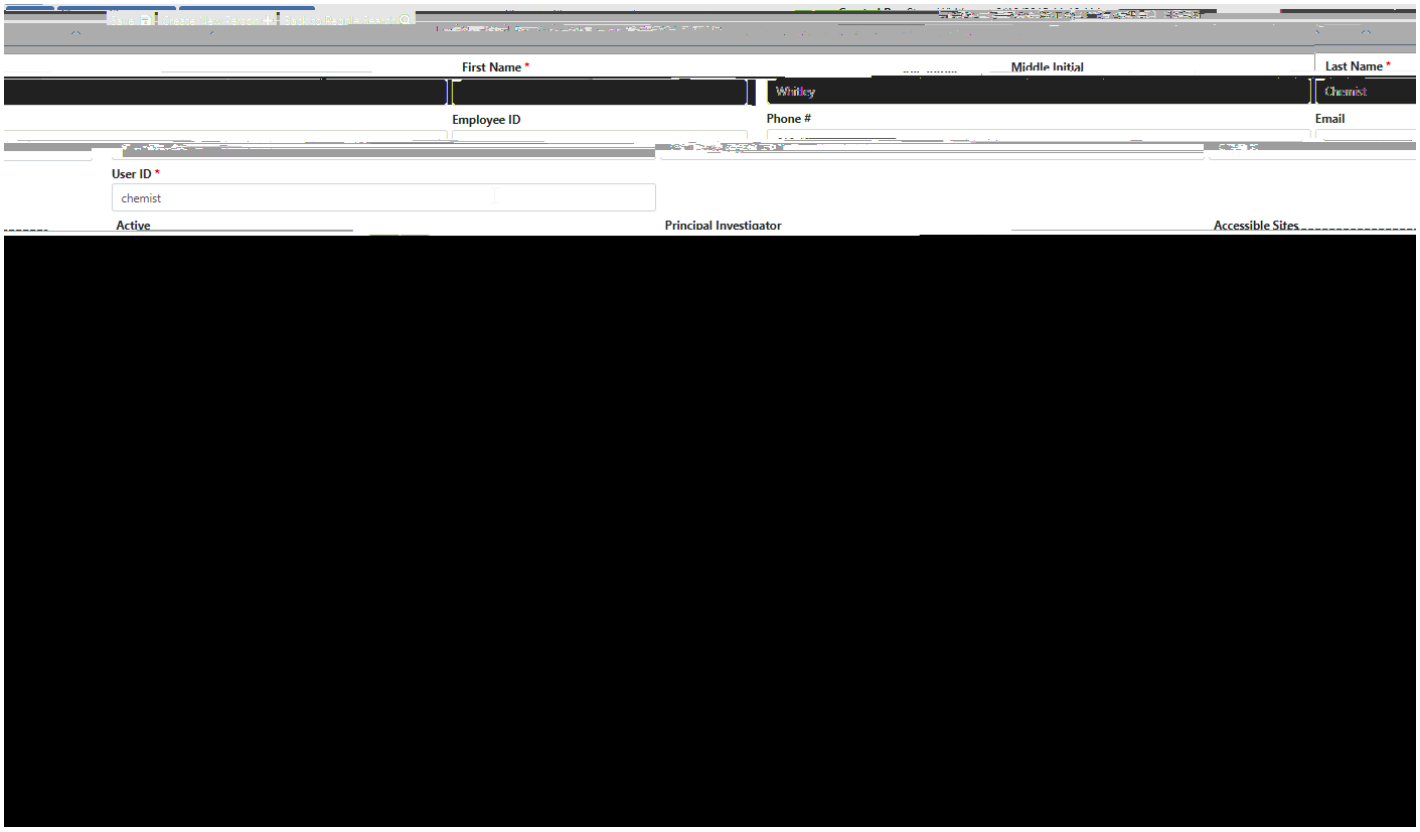
To assign a Lab Manager to a top-level organization, select the organization and then click Edit organization. The Edit Organization window will then appear.

Edit Organizations Page

A new field, Lab Manager, allows the selection of any active RMM user (following My Sites / All Sites constraints) as the Lab Manager for an organization. Designation of a Lab Manager for an organization is optional and can be changed or removed.

When creating a new, top

RMM 22.2 introduces an additional organization association Pictured below is Edit Person page with the three organization associations.



Edit Person Page for RMM **22.2**

The following table describes each organization association.

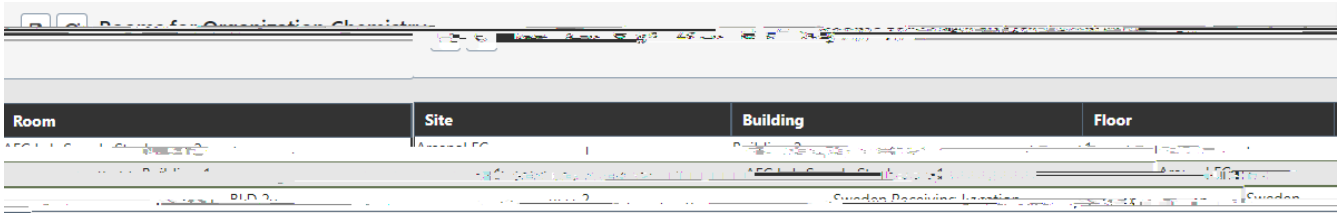
RMM 22.2 **Association**	**Description**	**New in RMM 22.2.0**
Primary Organization	When a shopping cart is submitted, if an approval is generated and the approval's type is designated to be "Approved By Organization" then the approval is also tagged with the creator's primary organization, and must be acted on by a user with both the required permission and the required organization association. In releases, when approving items tagged with an organization, a user (with the appropriate permission) could approve the item if the approval's organization was either • The logged in user's primary organization OR • One of the logged in user's "Organizations for which the user can approve" In the release, when approving items tagged with an organization, a user (with the appropriate permission) can approve the item only if the approval's organization is • One of the logged in user's "Organizations for which the user can approve" Note that on , if the user has at least one approval permission, the user's primary organization will be copied to the user's "Organizations for which the user can approve"	No But please read description for functional change
Organizations for Which the User Can Approve	This was labeled "Additional organizations that user can approve" in previous releases. No functional change in this release, but please read the description of Primary Organization immediately above.	No
Accessible Organizations	A new concept for RMM 22.2, Accessible Organizations are organizations to which a user has container access. Note that the User's Primary organization will always appear in this list. Please read the Overview section for details on container access.	Yes

Primary Organization Selector

A user will continue to be rganization via the Primary Organization widget (shown below).

Primary Organization widget

The Primary Organization widget has been enhanced to show the number of rooms currently assigned directly to a particular organization. In the above example, there are 3 rooms assigned to the Chemistry organization. Selecting the [redacted] icon launches a page (shown below) displaying all rooms associated to the organization.



View Organization Rooms Page

Note that the number of rooms and the rooms displayed do not include sub-organizations. Example: if "Organic Chemistry" was a sub-organization of "Chemistry", and "Organic Chemistry" had five rooms associated with it, those five rooms would not be included in the count nor displayed in the list of rooms for "Chemistry".

Accessible Organizations Selector

Accessible Organizations are organizations, in addition to Primary Organization, to which a user has container access.

The Accessible Organizations widget (shown below) lists all organizations and sub-organizations except for the users Primary Organization. A count of the number of rooms currently directly assigned to an organization is also shown.

Accessible Organizations widget

Selecting the Add + icon adds the selected organization to the list of Accessible Organizations (shown below). As with Primary Organizations, selecting the [redacted] icon launches the page displaying all rooms associated to the selected organization.

Accessible Organizations – Edit Person Page

Accessible Organizations - Fields

For each organization listed as an Accessible Organization, the following is displayed:

- Accessible Organization the name of the organization
- Organization Type
- Rooms Associated the number of rooms associated directly to the organization. This does not include rooms associated to any sub-organizations.

Accessible Organizations – Actions

The following

Locations Owned By Organization

Previously, a user could search by a location(s). With RMM 22.2, a new widget, Locations Owned By Organization (shown above) has been added to the Container Search criteria. The Locations Owned By drop down will display only organizations (active and inactive) that have been associated to rooms. When performing the container search, if an organization has been selected via this widget, the search will only return containers in those rooms that are directly associated to the selected organization and which the user has ability to access.

Owner's Organization

This widget existed in previous releases, but was s, if an organization is selected in this widget, container search the selected organization and which the user has ability to access.

CONTAINER ACCESSIBILITY RULES

As detailed in previous sections, RMM 22.2.0 introduces new container accessibility rules with regards to 1) Principal Investigators and 2) Organizations.

The following rules details **ALL** the rules within RMM which determine if a user can access a container via container search and source search. The rules are evaluated in order. Once a rule evaluates as **TRUE**, no further rules are evaluated. If no rules evaluate to **TRUE**, then the user cannot access the container.

	TRUE
	The container is accessible to everyone if: • It is NOT reserved for Project AND • It is NOT reserved for Owner AND • It is NOT in a List Controlled room AND • It is NOT in a room that is associated to an organization
	The container is accessible to any user with the "View All Containers and Rooms" permission can access the container
	The container is accessible only to the owner of the container

	The container is accessible if:
	• User has been explicitly assigned to the List Controlled room OR
	• Container in the List Controlled room is reserved for a project owned by a PI:
	  • Accessible by PI
	  •
	• List Controlled room is associated to an organization (department)
	  • Accessible by Lab Manager of the organization (department)

Example 2: A container

permission, and the container is in a List controlled room to which the user is NOT assigned. None of the rules evaluate to TRUE. The user does not have access to the container.

primary location is changed, the list of Related Sites will be updated to reflect this change, and show the sites related to the user's new primary site.

- – sites explicitly added to the My Sites list by the user or system administrator.

Accessible Sites Widget and Adding Sites

As in previous release, if the user has the *Preference - All Sites/My Site* permission Accessible ses). If the

REST WEB SERVICES APIS

There have been several new enhancements to RMM REST Web services.

NEW CONTAINER SEARCH API

This release introduces a new API - the container search API. The API takes the following criteria:

- Container Status
- Owner
- List of Materials
- Dates: Create, Disposed, Expiration, Room Acquire, and Site Acquired
- List of Locations
- List of Bar Codes

The returned data contains more than forty fields detailing information for each container.

For a complete description of the Container Search API, please read the RMM Web Services document.

ENHANCED FUNCTIONALITY

When doing a source search for inventory containers, the LOT # of the container will now be returned. The value of LOT # may be found in the Reserved1 field of the source search results. Please note that LOT # is also returned in the new container search API.

IMPROVED AUDITING CAPABILITIES

DOCUMENTATION

This release offers improved API documentation, including the use of Swagger. Swagger is a 3rd party industry leader in providing tools that

The RMM Web Services document has been greatly enhanced to provide detailed API information all in document, where before this information was found in several different documents.

DESUPPORTED API

The MoveContainerToUser web service, while still existing in this release, is no longer supported. Any integrations using this API need to be migrated to use the Container Transfer to Location and Owner API web service prior to the 23.1 release upgrade.

STOCKROOM

STOCKROOM INVENTORY ANALYTICS

A new report, Stockroom Analytics Fast Moving Items report, provides stockroom inventory item demand data for items where current projected demand is at or above average. The report generates data by quarter or by month.

Each row in the report provides the projected stockroom inventory item demand for the current month or quarter in addition to the

Report Results

The report header includes the selected report criteria in addition to the following values:

Field	Description
Current Period (Days)	Number of days into the current period (current quarter or current month). Example: 25 days
Current Period (%)	Percent of days into the current period (current quarter or current month). Example: 25 days into the current quarter Current Period % = 27.3%

The columns in the report detail section are as follows:

Field	Description
	Stock Master item name of the stockroom inventory item.
	Stockroom in which the item resides.
	Current number of units requested

Upon the selection of Update Waste Item Dates the Update Waste Item Dates window opens.

Update Waste Item Dates

The popup allows the user to specify the date type to be updated

Status Messages for Date Operation

Additional Date Enhancements

The following are additional enhancements with respects to dates:

A new column, Days Since Picked Up has been added to the Waste Item Search results and the Waste Item report. The column gives the number of days from the current date since the status of the item was changed to

OTHER ENHANCED CAPABILITIES IN RMM 22.2

This section lists other enhanced capabilities found in RMM 22.2

APPROVALS

There is now a new approval status his status indicates that no explicit action was taken on the approval but other approvals on the item were rejected.

Following is an example of when this status would be applied.

-
- U **NOT** .
- User A rejects the item
- The status of the item is
-
-

Note on Upgrade

During upgrade, for a given requisition item, if a requisition item has at least one approval with a status of e status of any other approval linked to that item has a status "RMM Approval Open" or "External Approval Open" the upgrade process will automatically set the status for those approvals to Closed Not Reviewed".

CONTAINER EDIT

Reconciliation Level

When doing a Container Inventory Reconciliation, the user can reconcile either at the room or sub-location level. In previous releases, the reconciliation level always defaulted to the room level. In this release, RMM can be configured to have the default either at the room or sub-location level. This configuration needs to be done by RMM Support. Please contact RMM Support to set this configuration.

Export

When exporting data from the Inventory Reconciliation page, the name [illegible]

RECEVING

Search Results

STRUCTURE SEARCH

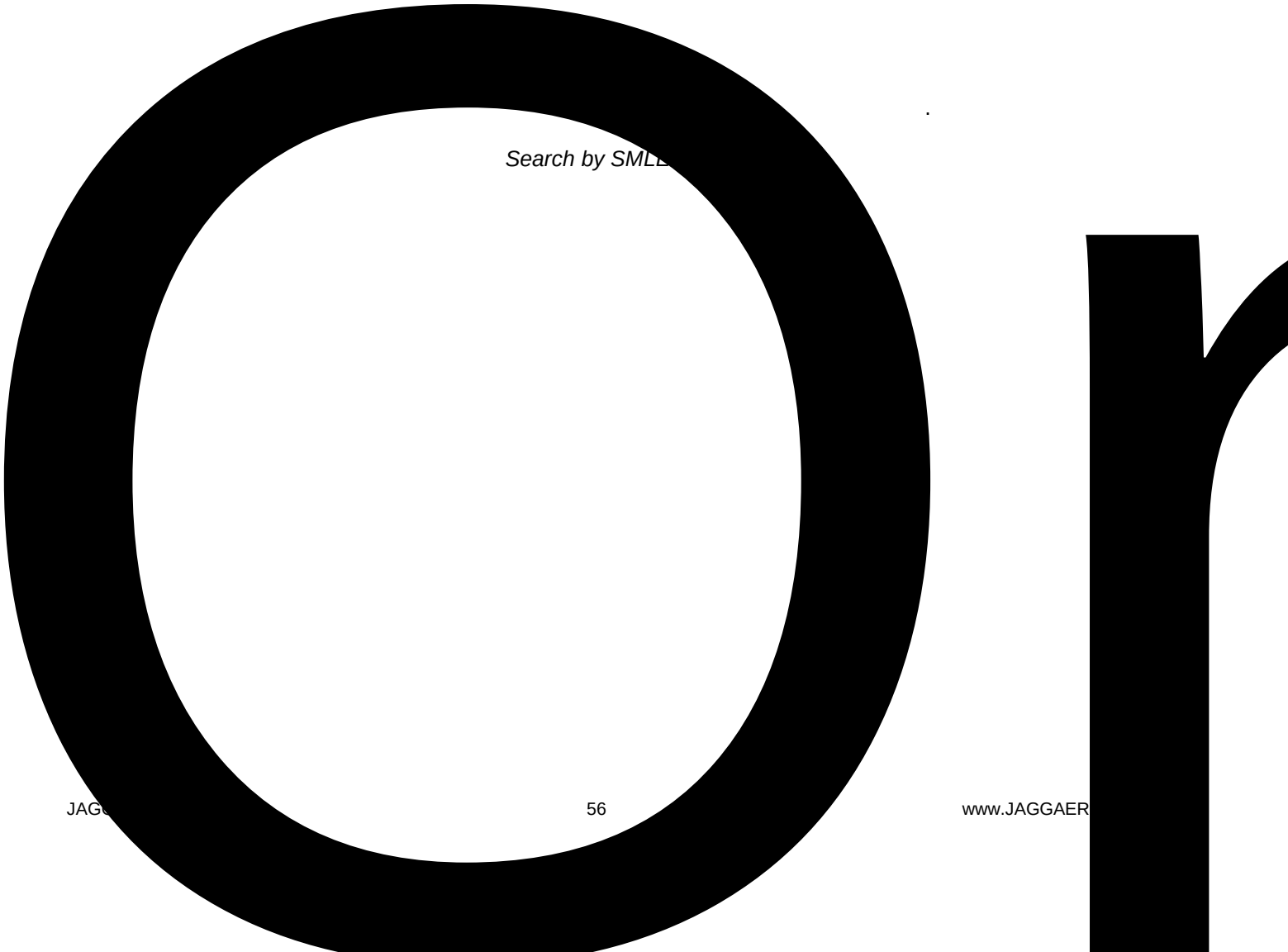
Marvin JS

The version of Marvin JS used within RMM has been updated from 20.3.0 to 22.6.1. Note that Marvin JS is licensed separately from ChemAxon.

Search by SMILES

On the Structure Search page, users can now search by a list of SMILES via the SMILES tab. The user may import or paste a list of SMILES. The SMILES strings will be converted to mol files, and then an exact search will be done on those mol files.

When search by SMILES, a maximum of 50 SMILES may be searched for against the JAGGAER and eMolecules structure databases.



INFRASTRUCTURE

Lab Balance Component

RMM communicates with electronic balances (scales) by installing a communication component on computers that are connected to the electronic balances. New installations of this communication component require Oracle JRE 1.17 or OpenJDK 17. Current installations of the Lab Balance component are not required to upgrade this component, and if not upgraded, can continue to run Oracle JRE 1.8 or OpenJDK 8.

Remove Driver

The RMM Remote Driver is an optional module for RMM in a hosted environment which is deployed inside the allows hosted RMM to access structure databases and external catalogs located inside the Not all installations use the remote driver. New installations of the remote driver require Oracle JRE 1.17 or OpenJDK 17. Current installations are not required to upgrade the remote driver, and if not upgraded, can continue to run Oracle JRE 1.8 or OpenJDK 8.

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