10. Container Search and Operations

Container (inventory) search, edit, transfer, dispose

Overview
This quick guide will show you how to search the internal inventory and make changes by transferring, editing, or disposing of items. All container operations start with Container Search.

1. Container Search
2. View/Edit container information
3. Container operations – transfer location and owner
4. Container operations - disposal

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<th>Steps</th>
<th>Screenshots</th>
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<tr>
<td><strong>1. Container Search</strong></td>
<td>![Screenshot of Container Search interface]</td>
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<tr>
<td>A. Click <strong>Container Search</strong>.</td>
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<tr>
<td>B. Select search option and perform search</td>
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<tr>
<td>a. <strong>Quick Search</strong>: searches all container fields including name, CAS number, biological descriptors, barcode, and supplier.</td>
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<td>b. <strong>Advanced Search</strong>: returns items that match all of the criteria specified</td>
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<td>o <strong>Contains</strong> – exact search (If multiple words are entered, those words must appear together exactly as entered)</td>
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<tr>
<td>o <strong>Owner</strong> – type in the owner’s first or last name, and click to select.</td>
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<tr>
<td>o <strong>Location</strong> – choose from the drop-down list or click 📦 to choose another location.</td>
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<tr>
<td>▪ The locations drop-down is populated with your alternate delivery locations. You may change your own alternate delivery locations in User Preferences.</td>
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<tr>
<td>c. <strong>Import</strong>: import a list of barcodes in a .csv file to search.</td>
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<td>d. <strong>Paste</strong>: type or paste a list of barcodes to search.</td>
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<tr>
<td>e. <strong>Scan</strong>: scan barcodes to search.</td>
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Notes:

- Starting a new search will clear previous search results. The exception is when using the Paste tab; check the New Search box to clear previous results.
- Maximum of 20,000 results are returned
- Search results only display items in your sector

Disposed items will appear in the search results unless the status is specified in an Advanced Search.

Tip: Advanced Search - using location selection

When choosing a custom location to search, your current selection is displayed in the top bar. In the example shown, floor 7 in building 301 is selected.

- Choose a Sector, building, or floor by checking the box next to the selected location.
- Use the dropdown lists to select a different building or floor.
- Choose a room or sublocation by clicking the location name, making sure all boxes are unchecked.
2. View/edit container information

A. Navigate
- Scroll to the right to see more container fields
- If more than 200 results are found, navigate to another page to see further results.
- Export results

B. Sort
- Sort the results by one or more fields by clicking in the column heading(s).
- Clear the sort by clicking in the Navigation bar.

C. Action
- Click to edit a container. (to change the owner or location, refer to Step 3 below)
- Click to replicate a container.
- Click to edit container amount.
- Click for more item details.
- Some items have a warning flag . Click this to view hazard information and Codes of Practice for the material.

Tip: View Safety Data Sheet (SDS)
There is a SDS available for most chemicals in ERM. Find it by clicking in the Action column (C), then select View MSDS.
3. Container Operations – transfer location or owner

A. From your search results, select the containers to transfer.

B. Click **Operations** and choose **Transfer Owner/Location** to change owner or owner and location, or **Transfer Location** to only change the location.

**Note:**
- Owner defaults to the logged-in user.
- The Locations drop-down is populated by the selected recipient’s alternate delivery locations. You may change your own alternate delivery locations in **User Preferences**.

C. **Transfer Owner/Location window**
   
   i. **Change owner**
      - Enter first name or surname in **Owner** field.
      - Click on the desired user’s name (don’t press Enter!)

   ii. **Change location (optional)** - check the Keep use location button if you don’t want to change the item’s location
      - Select location from drop-down list **OR**
      - If required location is not available, use location button to select the location.

   iii. Click **Transfer**.

D. **OR Transfer Location window**
   
   i. **Change location**
      - Select location from drop-down list **OR**
      - If required location is not available, use location button to select the location (Ignore Storage Location).

   ii. Click **Transfer**.
4. Container Operations – dispose

A. From your search results, select the containers to dispose.
B. Click Operations.
C. Select:
   a. Dispose OR
   b. Dispose Empty
D. Click Save.

Note:
- Dispose implies that the material was disposed of by an external contractor or by destroying the material rather than using it up.
- Dispose Empty means that the contents have been used up.

Important: When disposing of MPI-restricted biologicals, it is important to record the method of disposal in ERM. This is done by editing the container before disposing.

1) Follow Step 2 above to edit the container
2) Choose the appropriate disposal method listed under Storage Code.
3) Click Save
4) Then complete Step 4 above to dispose of the container.

When disposing cell lines that are thawed for use or culture, this additional step is not required and the items should be “disposed empty”.