

University of Lethbridge CHEMATIX Quick Reference Sheet for Users

Adding an item to your inventory:

1. Inventory Management
2. Add Chemical Container(s) to Your Inventory
3. Identify the chemical (i.e. Search using chemical name or CAS#)
 - * CAS# preferred method (find online or on MSDS)
4. Enter container specific information (i.e. container size, manufacturer, expiry date (for PECs))
5. Select lab where chemical is stored (select lab from drop-down list)
6. Click "Submit" to go to the next page
7. Select storage unit if other than "Undefined"
8. Enter barcode information if using preprinted labels
9. Click "Submit" to finalize and add to inventory

Viewing your inventory report:

1. Inventory Management
2. Manage Lab Inventory>Manage My Inventory
3. Select lab(s)
4. Enter chemical name or CAS# to find particular chemical, or select hazard to view all chemicals meeting that hazard description (if neither of these is specified will bring up entire lab inventory)
5. Click "Search Active Lab Inventory"
6. Shows a quick list of all containers meeting search criteria in the selected labs. To get a more detailed list click "View Inventory Details". This breaks down inventory by lab and storage units.
7. Can download inventory snapshot by clicking "Download Lab Inventory" or "Download Storage Unit Inventory"
8. Container information available by clicking barcode link. Chemical information and MSDS available by clicking on the CAS#.

Removing an item from your inventory:

1. Inventory Management
2. Upload Container Barcodes for Processing
3. Enter or scan barcode information on container(s)
4. Select container(s) to be removed ("Toggle All" to select all from the list)
5. Click "Change Container Status"
6. Select "Consumed by Experiment" from drop-down list
7. Click "Change Container Status"

Transferring a container within your lab locations (when you already have the chemical container):

1. Inventory Management
2. Upload Container Barcodes for Processing
3. Enter or scan barcode information on container(s)
4. Select container(s) to be transferred (“Toggle All” to select all from the list)
5. Click “Transfer Between My Labs”
6. Select lab location and storage unit to transfer container to from drop-down menus
7. Click “Transfer”

Transferring a container within your lab locations (when you need to search for the container):

1. Inventory Management
2. View My Inventory Report
3. Select all labs you would like to search
4. Enter chemical name or CAS#
 - * CAS# preferred (find online or on MSDS)
5. Select container(s) to transfer
6. Click “Transfer Between My Labs”
7. Select lab and storage unit to transfer container to from drop-down menus
8. Click “Transfer”
9. Retrieve container ensuring barcode matches container barcode transferred

Uploading barcodes for storage unit reconciliation:

1. Inventory Management
2. Upload Barcodes for Storage Unit Reconciliation
3. Enter or scan storage unit barcode (must precede container barcodes scanned)
4. Enter or scan all container barcodes in the storage unit
5. Click “Send to Chematix”
6. Inform lab supervisor that the storage unit is ready to be reconciled

To borrow a scanner please contact your department head.

University of Lethbridge CHEMATIX Quick Reference Sheet for PIs & Supervisors

Adding/Removing users from your lab:

1. Resource Management
2. View My Locations
3. Select laboratory link (must be lab PI or supervisor to manage laboratory personnel)
4. Click "Manage Personnel"
5. To add a new user, click "Search for Personnel to Assign" and search for user. Select the button next to the person's name and click "Add New User"
6. To remove a user, remove all roles from that user and click "Submit"

Uploading barcodes for storage unit reconciliation:

7. Inventory Management
8. Upload Barcodes for Storage Unit Reconciliation
9. Enter or scan storage unit barcode (must precede container barcodes scanned)
10. Enter or scan all container barcodes in the storage unit
11. Click "Send to Chematix"
12. Inform lab supervisor that the storage unit is ready to be reconciled

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Reconciling storage unit inventory:

1. Ensure all barcodes in that storage unit have been uploaded (See "Uploading barcodes for storage unit reconciliation" on Quick Reference Sheet for Users)
2. Inventory Management
3. Inventory Reconciliation > Reconcile Storage Unit Inventory
4. Select storage unit to reconcile
5. Double check storage unit for containers listed as "Missing"
 - * If missing containers not found, click "Mark as Missing" (these may show up later in another lab/storage unit, others may have not been properly removed from Chematix)
6. "Other Storage Unit Containers" are containers that have been moved from another storage unit within the lab. Either take the container back to its original storage unit or click "Transfer"
7. "My Other Labs Containers" are containers that have been moved from one of your other labs. Either take the container back to its original lab or click "Transfer"
8. "Containers Not Registered to You" are containers that have been moved from another lab which you do not have access to. Either take the container back to its original lab or click "Request a Transfer" (the transfer will have to be approved by the supervisor or PI of the other lab).

9. "Inactive Containers" are containers whose barcodes had been marked as "Consumed by experiment". Verify the container's contents. If the chemical matches the chemical the barcode is assigned to AND the chemical is still okay to use, mark as "Shelved".
10. Click "Reconciliation Complete" when there are no more containers left to be reconciled.

Any questions? Please contact:

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