CHEM myLab User Guide: Inventory module

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myLab Basics - New Web Version

Logging into myLab



If you use a shared computer to access myLab, you must login to the computer with your own credentials and then completely logout of the computer before the next user assumes control.

- 1. Access myLab through https://mylab.mcgill.ca
- 2. If prompted, enter your McGill username and password
 - o myLab is part of Single Sign On (SSO). If you are already logged in to another application which uses SSO, you will NOT be prompted to log-in.



If off-campus, you must be connected to McGill's VPN to access myLab

- For instructions on installing and launching the VPN, refer to this knowledge base article: https://mcgill.service-now.com/itportal?id=kb article&sysparm article=KB0010687
- For any problems connecting to the VPN, contact the IT Service Desk (login to start a chat): https://mcgill.ca/itsupport

Security protocols

ALL users logging into the myLab Web Application must do so using their Active Directory @mcgill or @mail.mcgill email credentials (the same as you currently use to login to Windows).

Individual (named user) login will:

- 1. Secure access to the application
- 2. Introduce a single-sign on (SSO) user experience
- 3. Facilitate provisioning access
- 4. Enhance auditing data (specifically who is viewing or editing what)



Basics of getting started with myLab and navigating the myLab interface

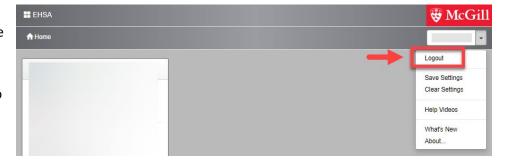
Consult the **myLab User Guide: Basics** for information on these topics:

- myLab Homepage PI Overview explained | CHEM modules explained
- Basic Navigation Help | Screen export (Options) vs McGill customized reports | Scrolling in a grid view | Returning to the menu screen within a module | Returning to the homepage of myLab
- Additional Help –Display options, exporting screen data, and saving customized settings

User Guides are available in the <u>IT Knowledge Base</u>.

Logging out of myLab

To logout of myLab, on any menu screen where your name is displayed (top right corner), click the down arrow next to your name and select **Logout** from the displayed options.





If you used a shared computer to access myLab, you must logout of the computer as well. It is not enough to just logout of the myLab Web Application.

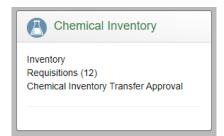
Inventory Module - New Web Version

To access this module, click the **Inventory** icon on the myLab homepage

 The number of items ordered through MMP which have not yet been added to the inventory or removed from the listing of Current Open POs (Requisitions) in myLab, is displayed in a red circle above the icon

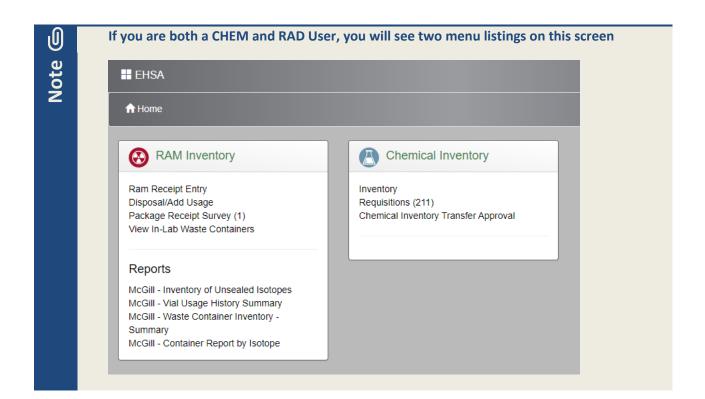


Several menu items are available under the heading *Chemical Inventory*



Menu item	Used for	
Inventory	 Viewing a listing of chemicals in your inventory (current, disposed, by lab location) Updating # of Containers and Container Size for an item in the inventory grid view Adding chemicals from non-MMP purchases to your current inventory Removing a chemical from your inventory Activating a removed chemical – adding a disposed chemical back to your current inventory listing Sharing/unsharing chemicals in your inventory Viewing shared chemicals from the inventory of other CHEM PIs within your Department + requesting a chemical transfer Transferring your inventory between your labs Viewing Safety Data Sheets (SDS) Viewing chemical inventory reports 	
Requisitions	 Adding chemicals ordered from MMP to your inventory Removing an item/removing ALL items from the listing of Current Open POs 	
Chemical Inventory Transfer Approval	Approving/denying a chemical transfer request	





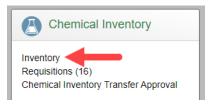


Inventory (Chemical Inventory): Viewing information about the chemicals in your inventory and adding/updating/removing items

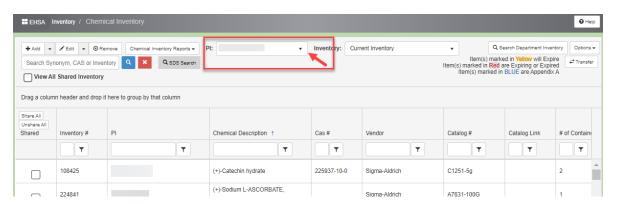
1. Click the **Inventory** icon on the myLab homepage



2. Click Inventory under the Chemical Inventory heading



3. All current inventory associated to the PI named at the top of the grid are displayed



To view a listing associated to a different PI - click the down arrow next to the field and make a selection

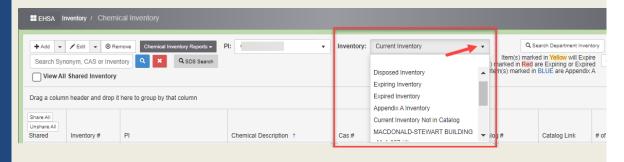
The number of items in the inventory is displayed at the bottom right corner of the window





Be sure to verify which **Inventory** is displayed on the screen (the default is *Current Inventory*).

If you changed the selection from Current Inventory, leave this menu item, and return again to this screen, the system will remember your last selection.





- If the same chemical is part of the inventory in multiple labs, the chemical will be listed multiple times in the grid of *current inventory* since each inventory item references one lab location.
- If the same chemical was purchased from different Vendors, the chemical will be listed multiple times in the grid since each inventory item references one Vendor.

In this section:

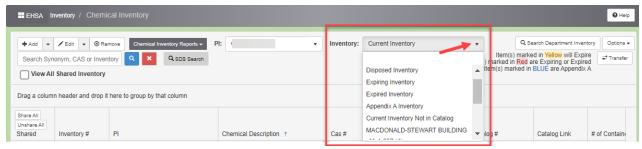
- Viewing a listing of chemicals in your inventory (current, disposed, by lab location...)
- Updating # of Containers and Container Size for an item in the inventory grid view
- Adding chemicals from non-MMP purchases to your current inventory
- Removing a chemical from your inventory
- Activating a removed chemical adding a disposed chemical back to your current inventory listing
- Sharing/unsharing chemicals in your inventory
- Viewing shared chemicals from the inventory of other CHEM PIS within your Department
- Transferring your inventory between your labs
- Viewing Safety Data Sheets (SDS)
- Viewing chemical inventory reports

Click the EHSA icon (top-left corner) to exit this menu option

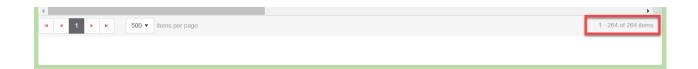


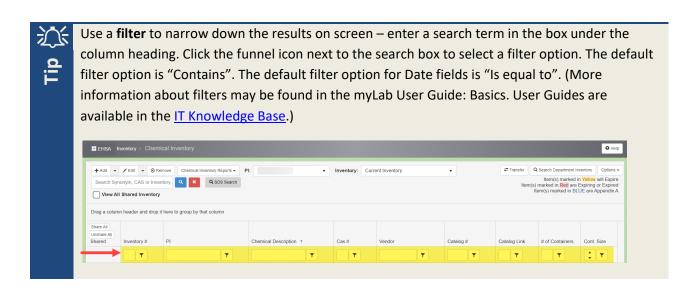
Viewing a listing of chemicals in your inventory (other than Current Inventory)

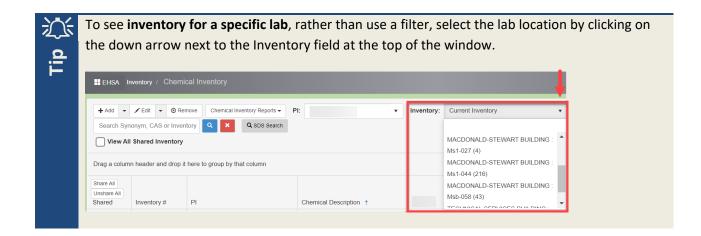
 In the Chemical Inventory screen, make a selection by clicking on the down arrow next to the Inventory field



Based on the selected Inventory listing, a count of the number of items in that inventory is displayed at the bottom right corner of the window







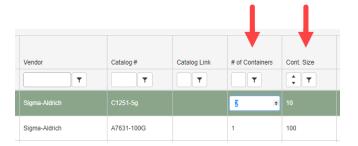
Note 🕞

If you change the selection for the *Inventory* field, leave this menu item, and return again to this screen, the system will remember your last selection - the default listing of *Current Inventory* will not be displayed.

Updating # of Containers and Container Size for an item in the Current Inventory grid view

In the Chemical Inventory screen, on-screen data entry is possible within the fields of # of Containers and Cont. Size

- 1. Find the item (row) in the grid
- 2. Click inside the cell to make an update
- 3. Use the up and down arrows to make a new selection
- 4. The information is automatically saved



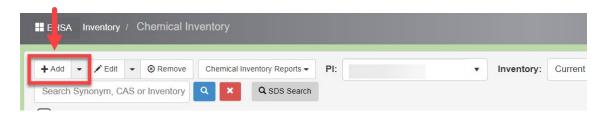
Adding chemicals from non-MMP Purchases to your inventory

Only chemicals purchased from sources other than MMP are added to myLab inventory using the steps below. To add items from MMP POs, follow these instructions.



If you **ordered a chemical already in your lab inventory and from the same Vendor**, once received, rather than adding the chemical using the *steps below*, **update the # of Containers and Cont Size** in the grid view of your current inventory (<u>instructions</u>).

1. In the Chemical Inventory screen, click **Add** near the top of the window



- 2. The Select a Chemical window opens
- 3. You have three options to search for a chemical to add to your inventory

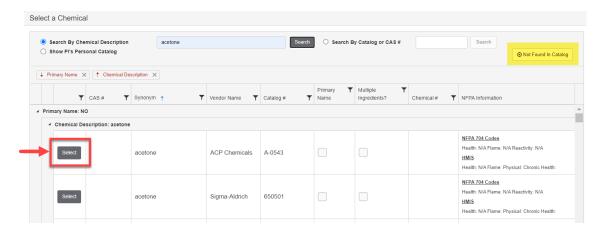


A & B: Click the **radio button** (circle) in front of the field label, enter search criteria in the box and click **Search**. Search results will display

C: Click the **radio button** (circle) in front of the field label, a listing of all chemicals in your inventory will display

4. Find the chemical to add from the displayed results. Click **Select** at the beginning of the row for that item

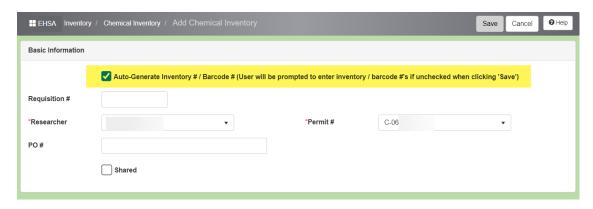




If no search results appear OR you do not find the correct chemical to add to your inventory, click **Not Found in Catalog** (right-side of the window)

5. The Add Chemical Inventory screen is displayed. If you selected a chemical in the previous step, information from that record is populated on this screen.

Do not remove the checkmark from the first field – Auto-Generate Inventory #...



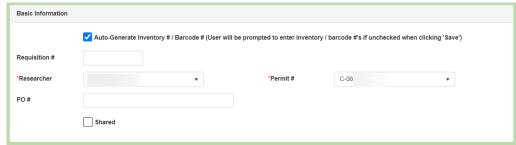
6. At minimum, fill in the required fields marked with a red *

Depending on the field, there are various ways to enter data:

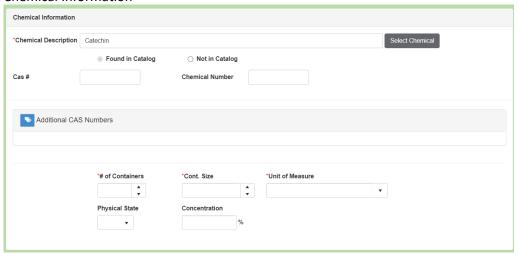
- Click the down arrow next to the field and make a selection from the listing
- Use the up and down arrow keys to select a value or enter a value
- Click the calendar icon to select a date

Sections to review/complete

Basic Information



Chemical Information



Some chemicals may have more than one Chemical Abstract Service (CAS) number. To enter those additional CAS #s:

Additional CAS Numbers

- A. Click the blue icon
- B. The section will expand
- C. Click Add
- D. Enter the required information and click Save



Once added, entries may be edited and deleted - select an entry (click in the row to highlight it) and then click a button (Edit or Delete)



 Vendor Information - if you selected a chemical in Step 4, information from that record is populated in this section



Location & Storage Information



Dates - Receipt date may be back dated if necessary



Chemical Information



 Record Addition Information – your information is displayed as the person logged in to mylab



Comments

7. Click Save at the bottom or top of the window to add this record to your inventory

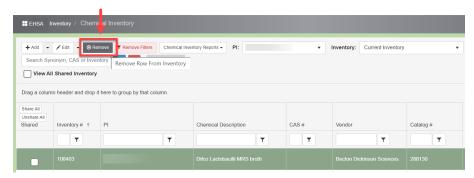


Click Cancel to exit this screen without saving your changes

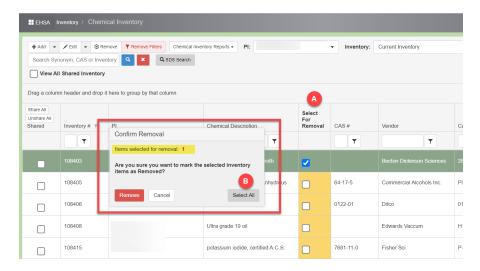
8. The chemical has now been added to your inventory and the inventory listing on the screen has been refreshed – the added entry (row) is shaded in green

Removing a chemical from your inventory

- 1. In the Chemical Inventory screen, find the item (row) to remove in the grid view and click in it (the row will be shaded in green)
- 2. Click Remove near the top of the window



- 3. A Confirm Removal window will open and an additional column is now displayed in the grid view Select for Removal
 - A. For each additional inventory item (row) you wish to remove at this time, click the box under the Select for Removal column. As you select more items, the # of items selected for removal is updated
 - B. To removal all items displayed on this screen, click Select All



4. Click Remove in the Confirm Renewal window

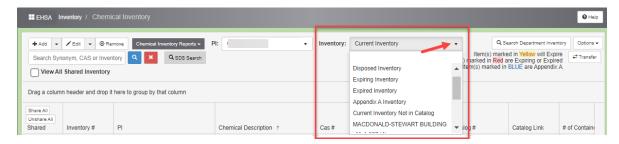
To close the window without removing any items, click Cancel

5. The inventory listing is refreshed and the removed items will now only appear in the *Disposed Inventory* listing. [To view this listing, click the down arrow next to the **Inventory** field at the top of the screen and select **Disposed Inventory**.]

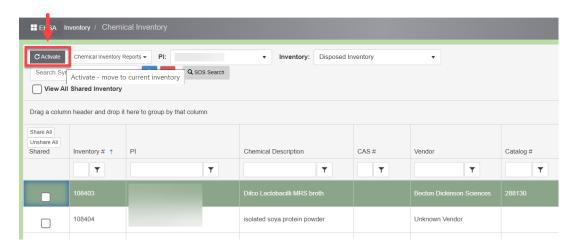


Activating a removed chemical to move it back to your current inventory listing

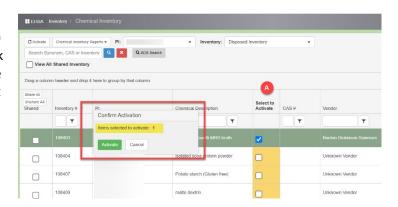
 In the Chemical Inventory screen, click the down arrow next to the **Inventory** field and select **Disposed Inventory**



- 2. The screen is refreshed. Find the item (row) to add back to your inventory in the grid view and click in it (the row will be shaded in green)
- 3. Click Activate near the top of the window



- 4. A Confirm Activation window- will open and an additional column is now displayed in the grid view *Select to Activate*
 - A. For each additional inventory item (row) you wish to add back at this time, click the box under the Select to Activate column.
 As you select more items, the # of items selected to activate is updated





5. Click **Activate** in the Confirm Activation window

To close the window without adding back any items, click Cancel

6. A Confirm Activation window will open



7. Click Yes

8. Both Confirmation Activation windows will close (Step 4 and Step 6). The disposed inventory listing is refreshed and the activated items will no longer appear on the screen, they are once again in your *current inventory listings*. [To view these listings, click the down arrow next to the **Inventory** field at the top of the screen and make a selection.]

Sharing/Unsharing chemicals in your inventory

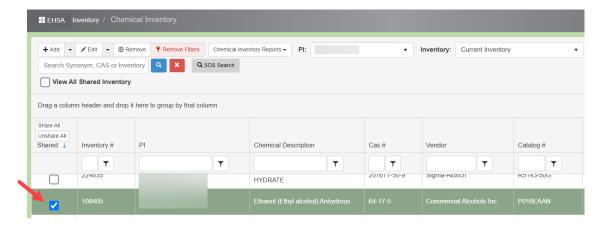
Sharing inventory means you are letting other CHEM PIs in your Department see the chemicals you have in your possession. This visibility allows them to request chemicals from you through myLab.

In this section:

- Sharing a chemical
- Sharing ALL chemicals in your Current Inventory
- Unsharing a chemical
- Unsharing ALL chemicals in your Current Inventory

Sharing a chemical

1. In the Chemical Inventory screen, for the item to "Share", click the checkbox at the beginning of the row



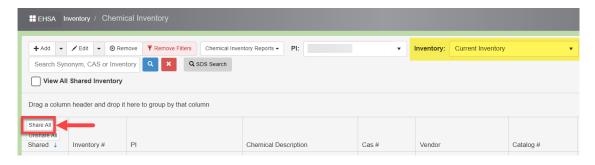
2. A confirmation message will appear. Click OK to close the window.



3. For each subsequent item to share in this session, click the checkbox at the beginning of the row. *No* confirmation message will appear on the screen (as in Step 2) – items will be automatically saved as shared.

Sharing ALL chemicals in your Current Inventory

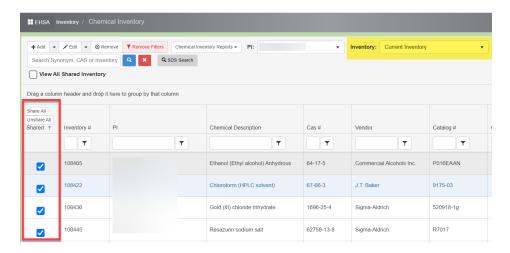
1. In the Chemical Inventory screen, click the button **Share All** (*this only works in the grid view of the Current Inventory*)



2. A confirmation window will open. Click **Yes** to mark all items in your current inventory as Shared. (Click No to cancel)



3. If you clicked Yes, the current inventory grid is refreshed, and all items in the inventory now have a checkmark to denote they are shared.



Unsharing a chemical

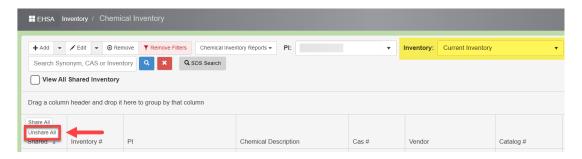
1. In the Chemical Inventory screen, find the item to "Unshare" and click the checkbox at the beginning of the row – this removes the checkmark. The item will be automatically saved and will no longer be shared.



If you **shared a chemical by mistake** and would like to unshare it, you will need to *exit* the Inventory menu item first and then come back to the Chemical Inventory screen. If you click the checkbox to mark an item as shared and then unclick the box, all in one sitting, the item is still marked as shared.

Unsharing ALL chemicals in your Current Inventory

1. In the Chemical Inventory screen, click the button **Unshare All** (*this only works in the grid view of the Current Inventory*)



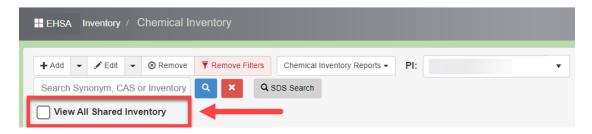
2. A confirmation window will open. Click **Yes** to update all items in your current inventory and mark them as Private. (Click No to cancel)



3. If you clicked Yes, the current inventory grid is refreshed, and all items in the inventory no longer display a checkmark in the Shared column

Viewing shared chemicals from the inventory of other CHEM PIs within your Department

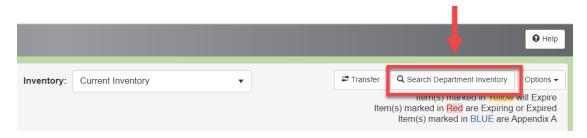
 In the Chemical Inventory screen, click the box View All Shared Inventory near the top of the window



The current inventory grid is refreshed displaying only shared items from other CHEM PIs within your Department

OR

Click the **Search Department Inventory** button on the top right side of the screen

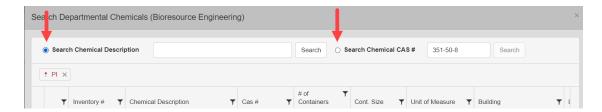


You have two options to search for a chemical

 By default, Search Chemical Description is selected: Enter search terms next to the field and click Search

OR

 To Search Chemical CAS #: Click the radio button (circle) in front of the field label, enter the CAS # in the search box and click Search



To request a chemical transfer for a shared chemical – follow these instructions

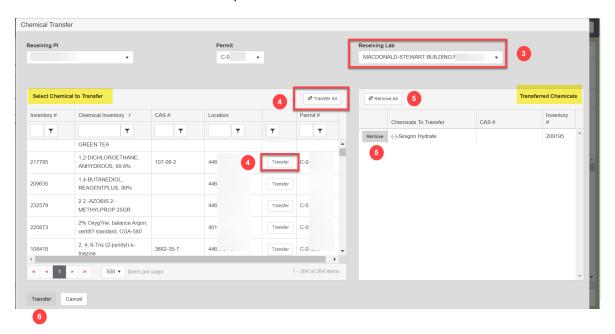


Transferring your inventory between your labs

1. In the Chemical Inventory screen, click the **Transfer** button on the top right side of the screen to transfer chemicals from the displayed inventory



2. The Chemical Transfer window will open



- 3. Select the **Receiving Lab** click the down arrow next to the field and make a selection from the listing of your labs
- 4. In the *Select Chemical to Transfer* section, find the chemical(s) to transfer in the table and click the **Transfer** button next for each chemical to transfer

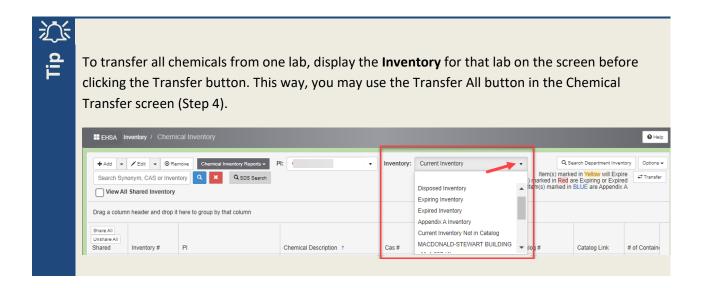
OR

To transfer all the listed chemicals to the selected receiving lab, click the **Transfer All** button

- Once you click the button (Transfer or Transfer All), the chemical(s) will appear under the section Transferred Chemicals
- 5. To remove a chemical added to the listing of *Transferred Chemicals*, click the **Remove** button next to it OR click **Remove All**



- 6. Once you have selected all the chemicals to transfer, click **Transfer** at the bottom of the window
- 7. The inventory grid is refreshed and the location of the transferred chemicals updated



Safety Data Sheets (SDS) Database Search

Safety Data Sheets (SDS) are technical bulletins that provide chemical, physical, and toxicological information about each controlled product, as well as information on precautionary and emergency procedures. By law the SDS information must be updated at least every 3 years. They must be readily accessible to anyone who works with, or who may otherwise be exposed to, those products. McGill has a portfolio of over 40,000 updated SDS documents through the MSDS online database.

Accessing the MSDS database:

1. In the Chemical Inventory screen, click the SDS Search button near the top of the window



2. A new tab will open with the MSDSonline Database. From the McGill Dashboard screen, click on the **Menu** link and then click **MSDSonline Search**.



All updates regarding the SDS database from the myLab officer can be found on the Dashboard screen.

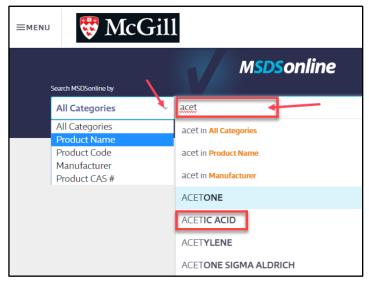
If no tab opens, look for a browser message to manage/allow pop-ups from this site and then repeat Step 1

Using MSDSonline Library

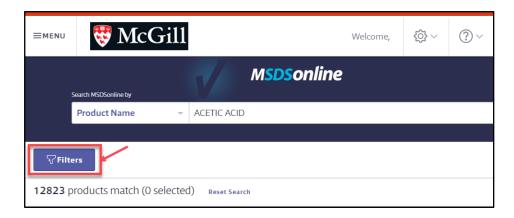
You may search for items from All Categories or select a category from the drop down list (product name or product code or manufacturer name or product CAS#) and enter a search item name or value in the text box to search.

When you start typing in the item name or value in the box, you will see a list of matching results on the screen. For example, as soon as you start type in **acet**, it is suggesting me a list of items that start with **acet** from the database. To select an item simply click on it.

For example, select **Acetic Acid** from the list.



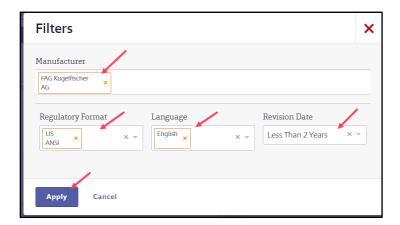
The resulting screen displays that there are 12823 Acetic Acid items in the database. From here, you can use more criteria to narrow your search using the **Filters.**



Click the Filters button.

On the resulting Filter screen, specify the Manufacturer, Regulatory Format, Language and Revision Date.

Click Apply.



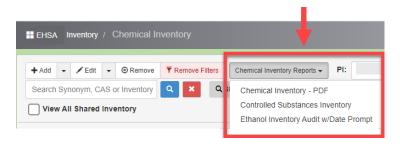
Note ©

If you do not find your required SDS document in the MSDS online website, send an email with the following information to: mylab.ehs@mcgill.ca

- Chemical name
- Supplier name
- Catalogue number of the product
- Name of your PI

Viewing Chemical Inventory Reports

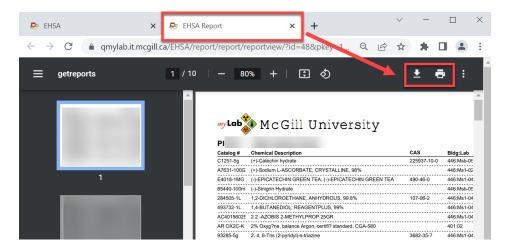
1. In the Chemical Inventory screen, click the **Chemical Inventory Reports** button near the top of the window and make a selection



Report Name	Notes		
Chemical	Once selected, the Report Parameters		
Inventory - PDF	window will open displaying the name	Report Parameters ×	
	of the PI named at the top of the	researcher ***Required***	
	Chemical Inventory screen	(×	
		Cancel View Report	
	Click View Report		
Controlled	■ Before selecting this report, you must select a row (click in the row, it		
Substances	will be shaded in green)		
Inventory	 Only run this report if the PI named at the top of the Chemical Inventory screen has controlled substances in the inventory 		
Ethanol	Only run this report if the PI named at the top of the Chemical		
Inventory Audit w/Date Prompt	Inventory screen is a permit holder for duty free ethanol		
,	Once selected, the Report Parameters window will open displaying the		
	name of the PI named at the top of the Chemical Inventory screen		
	Edit the Start Date and Stop Date fields — Report Parameters		
	make a selection using the calendar icon	Or start Date 1/11/2023 🛱	
	type in a date (By default, it displays tod	ay'S stop Date 1/11/2023 🛱	
	date. If you have already run the report	✓ Autofill ✓	
	today, the date selection last entered is	researcher "Required"	
	displayed.)		
		Cancel View Report	
	Click View Report		



2. The selected report will open in a new browser tab and is ready to download or print using the browser print function (screenshot below is using Chrome)



If no tab opens, look for a browser message to manage/allow pop-ups from this site and then start again at Step 1

- 3. Close the browser tab displaying the report
- 4. The Chemical Inventory screen is still open in a browser tab

Requisitions (Chemical Inventory): Adding chemicals purchased through MMP to your Inventory

When chemicals ordered through the McGill MarketPlace are received, they MUST be added to your inventory in myLab.

Only those who have **full access** to *myLab* will see their MMP purchases.

In this section:

- Adding an item from an MMP PO to your inventory
- Removing an item/removing ALL items from the listing of Current Open POs

Adding an item from an MMP PO to your inventory

1. Click the **Inventory** icon on the myLab homepage

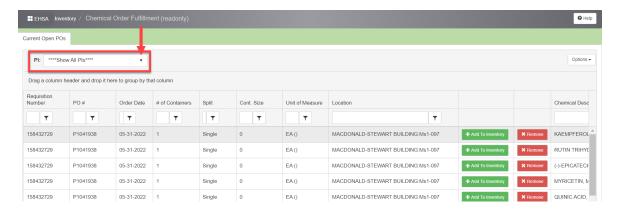


The number of items ordered through MMP which have not yet been added to the inventory or removed from the listing of Current Open POs in myLab, is displayed in a red circle above the icon

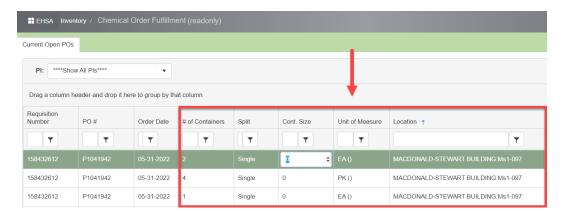
Click Requisitions under the Chemical Inventory heading



- 3. A listing of items from Current Open POs is displayed for all PIs you have access to view:
 - One item per row matching your MMP order
 - To only view items related to a particular PI, click the down arrow next to the PI field and make a selection.



- 4. Find the item (row) to add to your inventory
- 5. Update the fields for *Cont. Size* (Container Size) and *Unit of Measure*. You also have the option to update # of Containers and Location.:
 - Find the item (row) to edit in the grid view
 - Click inside the cell to make an update



- Use the up and down arrows to make a new selection or use the drop-down list which appears in the field
- The information is automatically saved

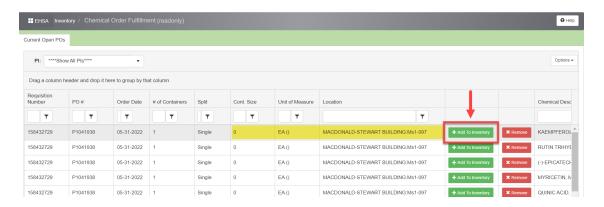


By default, **Cont. Size** has a default value of 0, this needs to be adjusted. *Example: If the Unit of Measure is "EA()"[each], select "1" as the Cont. Size*

The **Split** field is not being used.

6. Once the item has been reviewed and updated, click the +Add to Inventory button for that item



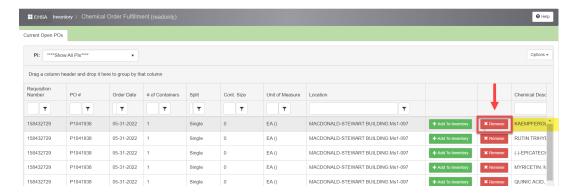


7. The listing in the grid view is refreshed and the item no longer appears. The item has been added to your inventory and now appears in your inventory listing.

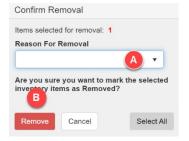
Removing an item from the listing of Current Open POs

Items such as gloves, lab coats, safety glasses that you received and do not wish to add to the *myLab* inventory or items that are on back order etc. may be removed from the listing of Current Open POs.

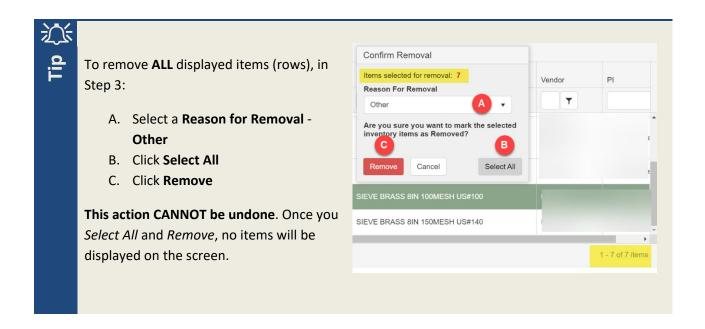
- 1. Find the item (row)
- 2. Click the X Remove button for that item



- 3. A Confirm Removal window will open
 - A. Select a **Reason for Removal** click on the down arrow under the field and select **Other**
 - B. Click Remove



4. The listing in the grid view is refreshed and the item no longer appears





Inventory & Chemical Inventory Transfer Approval (Chemical Inventory): Requesting and Approving Chemical Transfer Requests

myLab allows Principal Investigators (PI) to view shared chemical inventory records of other CHEM PIs in their Department and request chemical transfers through the Inventory menu item. They may also check the status of their request(s) through the Inventory menu item.

When a CHEM PI makes a chemical transfer request for a shared chemical in your inventory, you receive an email notification. You must then approve or deny the transfer request using either the Inventory or the Chemical Inventory Transfer Approval menu item.

In this section:

- Requesting a chemical transfer from the inventory of a CHEM PI within your Department
- Approving/Denying a Transfer Request [McGill & Onsite Systems Help]
- Checking the status of your transfer request [Onsite Systems Help]

Requesting a chemical transfer from the inventory of a CHEM PI within your Department [McGill & OnSite Systems Help]

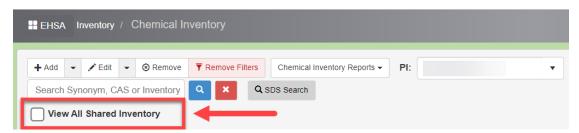
1. Click the **Inventory** icon on the myLab homepage



2. Click Inventory under the Chemical Inventory heading



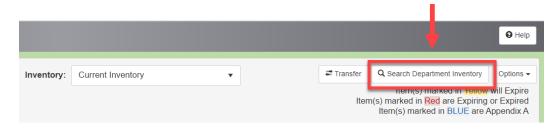
3. Click the box View All Shared Inventory near the top of the window



The current inventory grid is refreshed displaying only shared items from other CHEM PIs within your Department



Click the **Search Department Inventory** button on the top right side of the screen

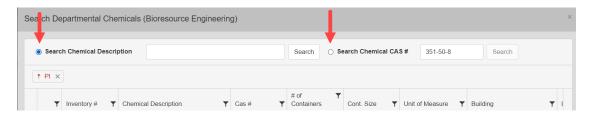


You have two options to search for a chemical:

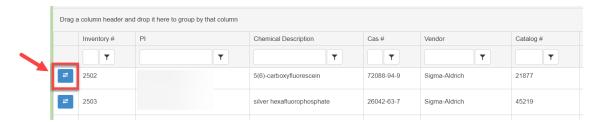
 By default, Search Chemical Description is selected: Enter search terms next to the field and click Search

OR

■ To **Search Chemical CAS** #: Click the radio button in front of the field label, enter the CAS # in the search box and click Search

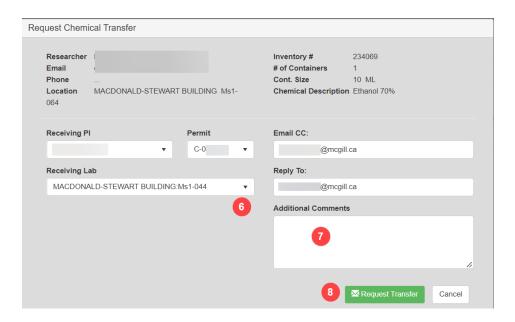


4. Find the item you would like to request in the displayed results and click the **Request Chemical** (**Transfer**) button at the beginning of the row.



Depending upon the search option you chose in Step 3, the columns in the table may be displayed in a different order. However, regardless of search option used, the first column will have the blue *Request Chemical* icon.

5. The Request Chemical Transfer window will open pre-populated with information about the requested item and the receiving PI (you)



- 6. If blank, or incorrect, click the down arrow next to the Receiving Lab field and make a selection
- 7. [optional] Enter Additional Comments to be included in the transfer request email
- 8. Click Request Transfer

The Transfer Request function will send a transfer request email (see sample email below) to the PI with the inventory item in current inventory. The PI receiving the request will need to log into myLab and approve or deny the transfer request.

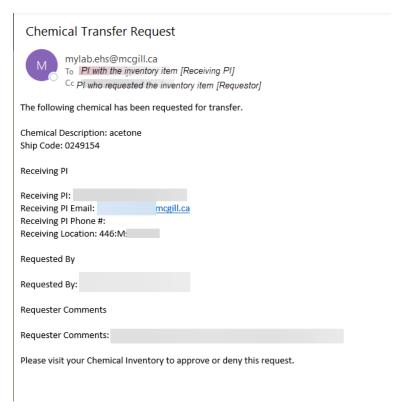
9. A Request Submitted confirmation appears. Click **OK** to close window.





Formally requesting a chemical transfer through myLab means that you are requesting the **entire inventory item** – if the item ha 3 containers, all 3 containers will be transferred. There is no option to transfer 1 container or a portion of a container.

Sample Transfer Request email



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Approving/Denying a Transfer Request [McGill & Onsite Systems Help]

When a CHEM PI within your Department makes a chemical transfer request for a shared chemical in your inventory, you receive an email notification. You must then approve or deny the transfer request.

1. Click the **Inventory** icon on the myLab homepage

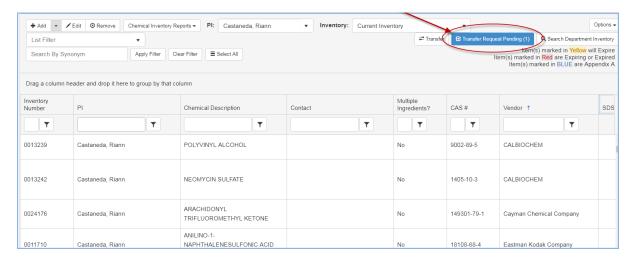


2. Click Chemical Inventory Transfer Approval under the Chemical Inventory heading



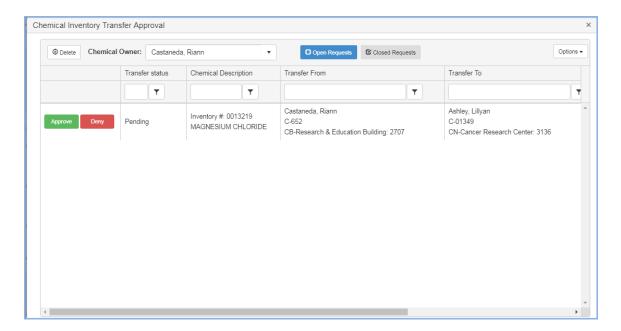
OR

Click **Inventory** under the Chemical Inventory heading and then click the **Transfer Request Pending** button near the top of the window. The button will show the number of pending requests

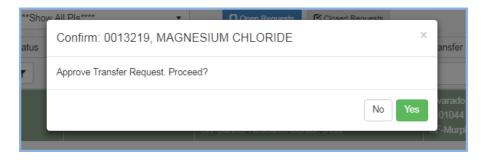


- 3. The Chemical Inventory Transfer Approval screen is displayed
- 4. The user can toggle between [Open Requests] (shown below) and any [Closed Requests] by clicking the appropriate button.





5. Click the [Approve] or [Deny] button on the request. When the [Approve] button is clicked, a Confirmation box will appear. Click [Yes] to proceed.



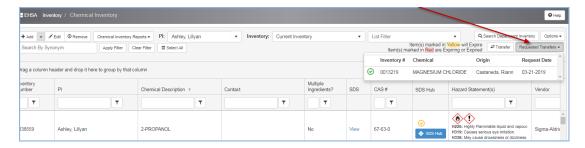
6. A Transfer Successful pop-up will appear. Click [OK] to close this confirmation message.



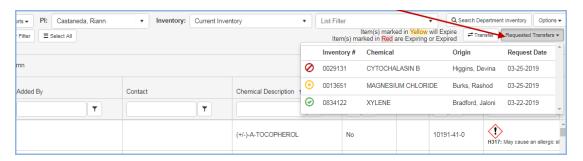
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Checking the status of your transfer request [Onsite Systems Help]

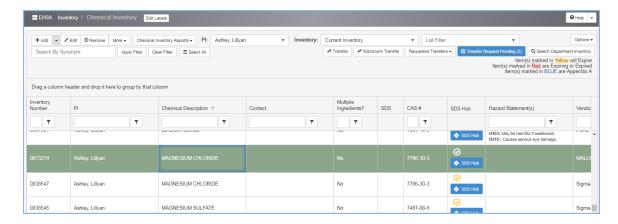
- 1. The PI that the inventory item has been transferred to can check on the status of Requested Transfers by clicking the [Requested Transfers] button (displayed when you go to the Inventory menu item).
- 2. The green check shows that the transfer has been approved.



3. Here is an example of multiple requests in the Requested Transfers list. Any Red ∅ items are denied, Yellow ⊙ items are Pending, and Green ⊚ items are Approved.

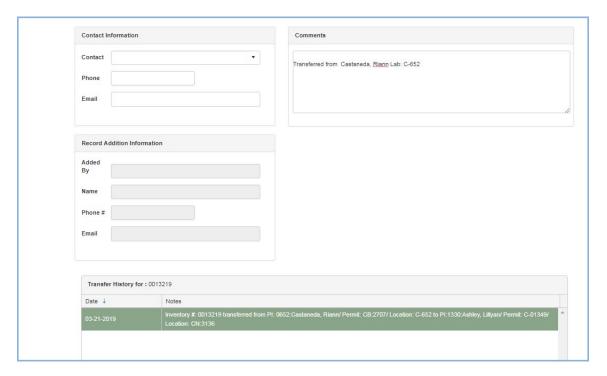


- 4. The Requester will also receive an approval or denial email (<u>sample emails</u>).
- 5. The PI or Lab Manager will need to arrange to pick up and physically move the approved transfer inventory item to the receiving PI's lab.
- 6. The Requesting/Transfered to PI can search for and view the inventory item in her inventory.





7. The Transfer History is shown on the Inventory item detail

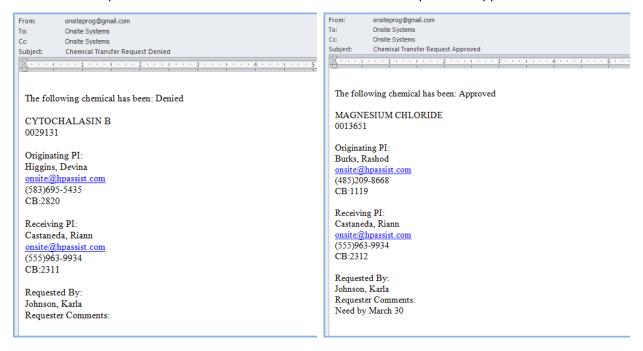


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Sample Denial and Approval emails [OnSite Systems Help]

Here is an example of a Denial email.

Here is an example of an Approval email.



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Need Help?

