Vertére
Inventory Manager - Enterprise Edition

User's Guide

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About This Guide

Purpose	This User's Guide provides procedures and information to help you customize the Equipment, Chemical, Biological and Supply Modules of the Vertére Inventory Manager Enterprise Edition for your installation and to help you perform all the operations involved in successful implementation.
Version	This document applies to versions 2.10 and later.
Audience	This Guide is designed as both a training and a reference tool for: • System Administrators to customize and maintain the software for your installations, • Site Administrators to customize and maintain site-specific information, • Users at each site to setup the database and perform all inventory operations needed, and • Users who require only 'lookup' rights.
Skill Level	Users of the Vertere Inventory Manager (VIM) must have a working knowledge of Internet Explorer or Firefox operation.
Conventions	The table below provides the conventions used throughout this User's Guide.

Action	Convention	Example
Type a response	Boldface	Type **install** at the C prompt.
Press a key	Boldface, enclosed in brackets	Press **[Esc]** to exit the screen.
Click a button	Boldface, initial capitals	Click the **Add** button.
Read a prompt	Enclosed in quotation marks	The prompt displays, 'Do you still want to generate the report?

Inventory Manager Support

We encourage you to visit www.Vertére.com to request a User ID and begin using the Vertére Support Forum. Use Vertére's web-based support section to download documents such as this Guide, installation, or upgrade instructions.

If your site has a Maintenance Agreement, the Vertére Support Forum offers other tools to help you such as custom reports, a forum where you may post questions to support staff and other Inventory Manager users, and soon, on-line training options for each module.

Your Maintenance Agreement also ensures that you receive the latest upgrades (which will also be available in the Vertére Support Forum) and that you may call Vertére at **1.800.628.9917** for direct support.

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1. ABOUT THE VERTERE INVENTORY MANAGER-ENTERPRISE EDITION

Intended Audience

This section explains basic system design, navigation and general guidelines for all users.

Modules

The Enterprise version of the Vertére Inventory Manager is a web-based, multi-module inventory management system for scientific materials. Any authorized user can add, edit, or dispose inventory records at their own workstation using common browsers: Internet Explorer, Firefox, or Safari.

Individual modules focus on the data, functions, and reporting requirements needed to manage laboratory equipment, chemicals, biologicals, and stockroom inventory. One or more of its modules have been licensed by your organization to assist you with control, compliance, cost savings, and quality assurance in a laboratory setting.

Table 1. Enterprise Options

Configuration	Software	Special Functions	Benefits
Enterprise Core Database	**MS SQL 2005 ASP.NET 4 or later**	Barcode printing, importing data from portable barcode readers, running custom reports, physical inventory and reconciliation fully supported. Supports multiple business units or organizations. Licensed by organization, module, and organization concurrent users.	Secure access and control for all modules through local browsers. Supports multi-organization installations with organization-specific setup options. Reduces cost of implementation. Reduces cost of system support—no workstation requirements; all program data on one server.
General Module (can be upgraded to Fixed Asset Module)		Item-level control of equipment, animals, etc. Enhanced fixed asset module to support asset ageing, depreciation, and financial reporting.	Uses existing locations, users and groups. Capital asset option with split account options and monthly or annual depreciation.
Chemical Module		Chemical physical, safety, regulatory data shared among all organizations.	• Container-level chemical control for each organization. • Reduces data entry. • Ensures consistent reporting, safety, regulatory, physical data.
Biological Module		Biological sources, attributes, safety, regulatory data shared among all organizations.	Control for biological items including bio-safety levels 1-4
Requisition Manager		Shopping cart to allow end users to request items from catalog, inventory or supply center.	Filters against chemicals of interest lists and speeds new record creation when orders are received
Supply Module		Requisition and stores perpetual inventory: order, receive, withdraw, bill, cycle counts.	Supports multiple storerooms within each organization; filters requisitions against organization-defined lists.

Organization Control

Organization Control

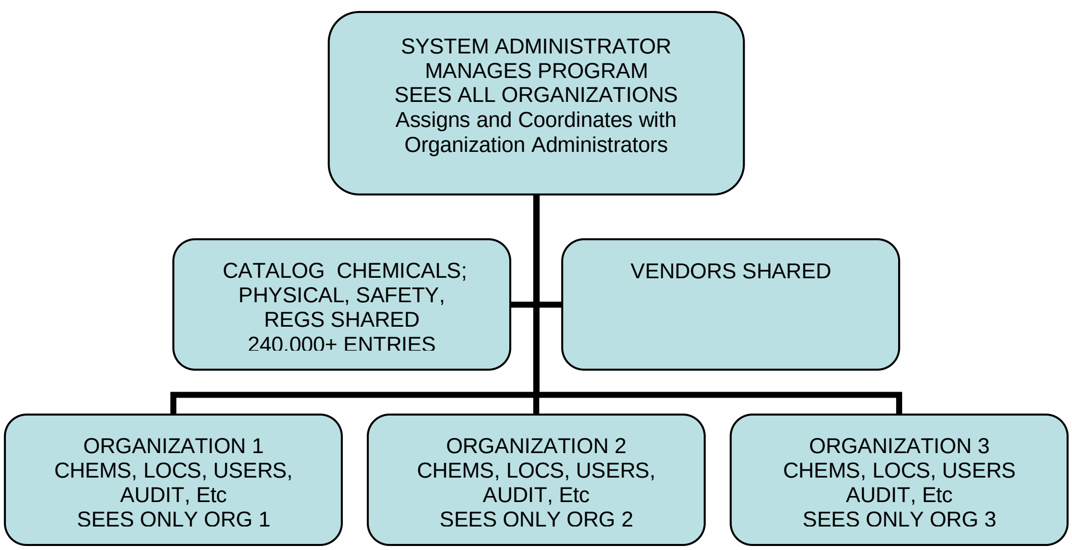
The enterprise version offers large or complex organizations the opportunity to manage all classes of inventory for multiple locations or business units—what we call ‘organizations’—while keeping the inventory records segregated. The Enterprise version supports different requirements for data but meets the common need for reporting and system maintenance. For example, four universities may partner to share one database hosted by one of the partners or by Vertére.

Manage One or More ‘ Organizations’

Or multiple departments (or campuses) within one organization may deploy the enterprise version. For example, chemistry, engineering, pharmacy, art—each with different requirements for data but a common need for reporting and system maintenance—may be separate ‘organizations’.

Internal security options control user roles and permissions and limit access to modules and inventory records.

- Each organization may license one or more modules and a designated number of concurrent users.
- Each organization may define its own security rules within each module.
- Each organization may define field labels, tool tips, and required and disabled field values with each module.
- Each organization and each module may have inventory tag numbers that are duplicated by other organizations and modules making it easy to integrate data from legacy systems.
- Users at each organization view only their own locations, their own users and organizational groups, and their own inventory records.
- Users of each module view only records specific to their organization.



Startup Users

The Inventory Manager is delivered with one user, the System Administrator (or Super User). The System Administrator has access to all organizations and is assigned all available rights within the system.

Barcoding Options:

- *On demand*
- *Pre-printed*
- *None*

The Inventory Manager takes advantage of barcoding, a proven method recommended but not required, for identifying inventory items and their locations. During the initial inventory, users can enter details for a container and apply a barcode as a ‘license plate’ for the item. Barcoding increases the speed and accuracy of inventory processes by providing positive identification.

Users can print barcode tags on demand or use preprinted tags to reduce the requirement for barcode printers. When tagging is not possible or appropriate, the system will assign a reference number to the item(s) and users can identify that the items are not ‘tagged’.

Navigating in the Inventory Manager

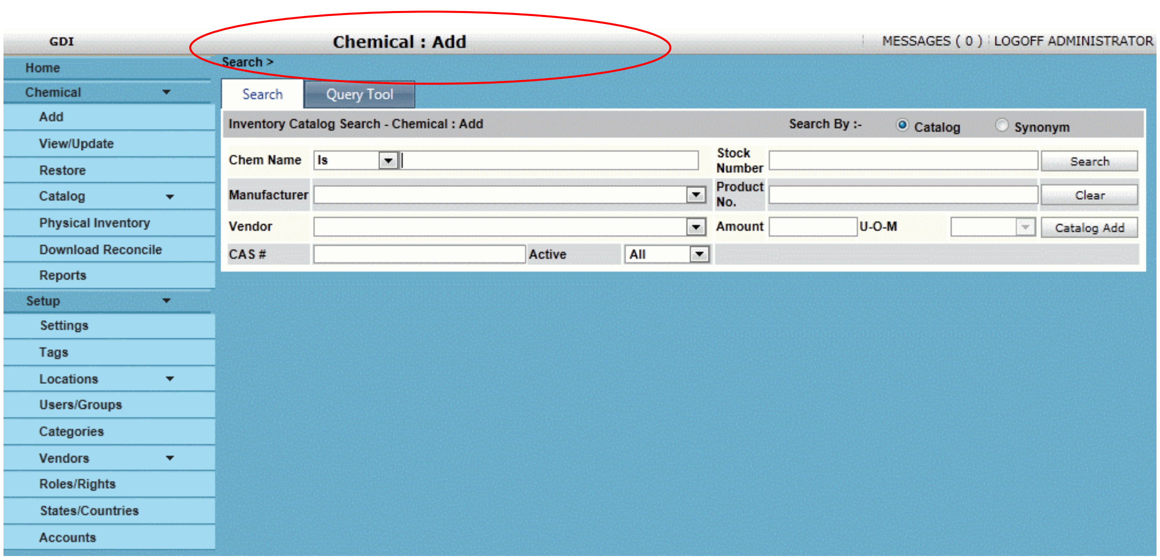
To advance through data entry fields, use the **[Tab]** key.

To activate a Search, enter at least one criterion and press **[Enter]**.

Warning: Pressing **[Enter]** during the data entry procedure except in a dropdown field, may prematurely force a SAVE action because the Save button is generally enabled so that users are not forced to click the **Save** button when data entry is complete.

To accept a selection from a dropdown table or from a tree, press **[Enter]**.

As you navigate through the application, the main menu bar will always identify where you are. In the following ‘Navigation Guides’ screen, you will see the information ‘Chemical: Add’ and below it the prompt that indicates the user is in the ‘Search>’ mode.



Navigation Guides

Special Terms

As you use the Inventory Manager, you will encounter these terms:

- **Organization** – A specific business, geographic, or organizational unit that has licensed one or more modules of the Inventory Manager and that implements the system to restrict its inventory records to individuals associated with the business, geographic or organizational unit.
- **Active Catalog** – a catalog record that is now or has been in your active inventory. This value simplifies reporting. When searching the catalog, use the value to filter results.
- **Biological Information Gateway** – the path to safety, regulatory, physical data, MSDS and other data about your biological items.
- **CAS** – the Chemical Abstracts Service registry number for pure chemicals. This value can be entered with or without its normal dashes. As of January 2008, the format is 9999999-99-9. The system validates the CAS value against the algorithm used by the Service and will reject a CAS that does not meet the criteria.
- **Catalog** – a resource Vertére delivers to you listing over 230,000 chemical products; to this starting list you will add any other products that you make or purchase and will include in your inventory.
- **Chemical Information Gateway** – the path to safety, regulatory, physical data, NFPA, HMIS, MSDS and other data about your chemicals.
- **Group** – an organizational unit such as department, division, project, or program.
- **Key Field** – the primary identifier for values within a table, for example, the State_ID field in the Sys_States table shown above.
- **Location** – the place where inventory items are stored or used.
- **Master ID** – the key field that links catalog records to physical, regulatory, and safety information; viewed only in the Information Gateway.
- **Module** – licensed individually for each organization: General, Chemical, Biological, Fixed Asset (General with enhanced features), Web, HASP, or Supply.
- **Strain** – key field used in the Biological module only.
- **Table** – a set of data that has columns for specific information and rows for each record. For example, the Sys_States table includes the values shown below. You will need to be familiar with the main tables used in the system to design barcodes or custom reports.

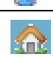
State_ID	State_abbrev	State_name	Country_code
1	AL	ALABAMA	218
2	AK	ALASKA	218
3	AS	AMERICAN SAMOA	218
4	AZ	ARIZONA	218

Sys_States Table

- **Tag** – the organization-specific value used to identify a location, user, group, or container-level record. You will use the 'tag' numbers in collecting data with barcode readers. The tag is a unique identifier that functions like a license plate.
- **User** – person who will have log in access to the inventory system or who will be identified as the custodian for inventory items.
- **Vendor** – the company from which you procure chemicals or other items that are included in your inventory. May be renamed, e.g., Supplier. Should be the name on the chemical container.
- **Verify** (chemicals or biologicals) - the task assigned to specific users to ensure that new catalog records meet the organization administrators' standards for data elements.

Special Prompts

The following prompts have special uses.

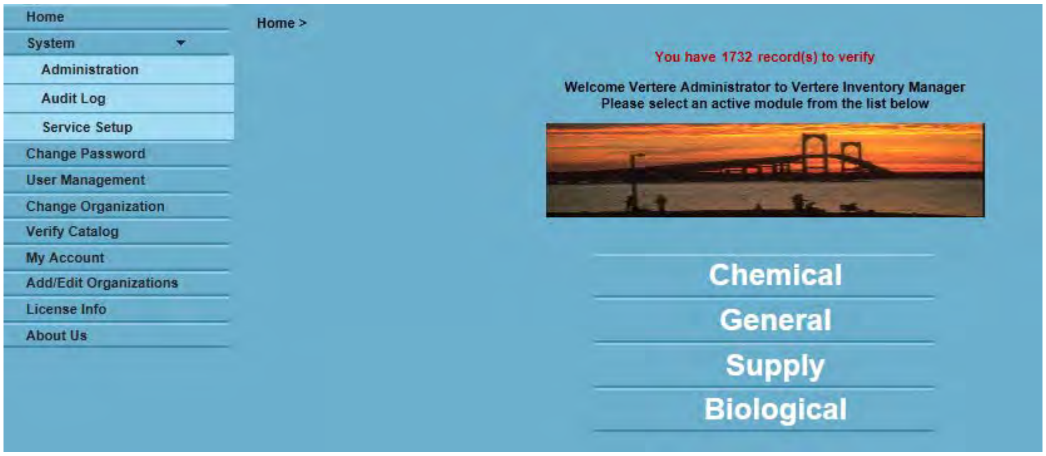
Prompt	Meaning
* Barcode #	**Asterisk** preceding a field: The ***** denotes a field that your organization has defined as a required data element.
Return	**Return**: If you have used the 'add on the fly' option to enter or view data in a supporting table, use the **Return** button to go back to the original data entry form.
Copy Last Data	**Copy Last Data**: Add another record using the values of the record that is in focus BUT assign a new barcode number and change one or more other values such as user or group, location, or lot number.
Add Many	**Add Many**: Create more records using the values of the record that is in focus changing only the barcode numbers that are assigned to the additional records.
Print Tag	**Print Tag**: Print a barcode for an inventory item, a user, a group, or a location. This button enables only after a record has been saved.
Delete	**Delete:** Remove the record from the database. Wherever you see the red X, ☒, a delete option exists. Only records that have never been used within the database can be deleted.
Save	**Save:** Commit the data to the database to preserve all changes.
Active All All Yes No	**Active:** the Catalog records for which you have inventory. **All** – displays or searches all catalog records whether you have the chemicals on organization or not. **Yes** – displays or searches only those catalog records that represent items that are or have been on organization. **No** – displays or searches catalog records that you have not had in inventory; caution-this will display over 230,000 records.
Change Tag...	Replace the barcode number assigned to an item with a new number.
	**Edit:** click on this icon to select a record for editing.
	**User:** click this icon to add or edit a record in the user/group tree. If the icon is green, the individual is an organization administrator.
	**Group:** click this icon to add or edit a record in the group tree.
	**Location:** click this icon to add or edit a record in the location tree.

Special Use: The following prompts have special uses.

Use . . .	To . . .
Search	find a specific record or record set from the standard lookup values.
Query Tool...	create a custom lookup using one or more criteria.
New	add a record to any table that supports your inventory (vendors, catalog, etc.).
Show All	show all rows in the View/Update window on one page; required for use of the 'Select All' option when results exceed the normal page limit defined in your setup.
Select All	mark all records in the search results grid for processing.

Module Options

The Inventory Manager displays Module options appropriate to your organization license and your individual Roles and associated Rights. For example, a user associated with the Queen's University organization would automatically log on to the Queen's organization. Of the modules licensed by the organization, only the modules to which the user has access will display.



Menu Options

In a database that hosts two or more organizations, the System Administrator has the menu option to Change Organization for review, reporting, or support.

Other users will be presented with the module options licensed by their organization and available to them based on their Role and Rights.

Inventory

- General – laboratory or safety equipment; general purpose inventory control; enhanced general module offers fixed asset management tools for account and fund management
- Chemical – chemical items
- Biological – biological items
- Supply – storeroom functions

Menu options are specific to the module. Your Role will determine which of these options are available to you.

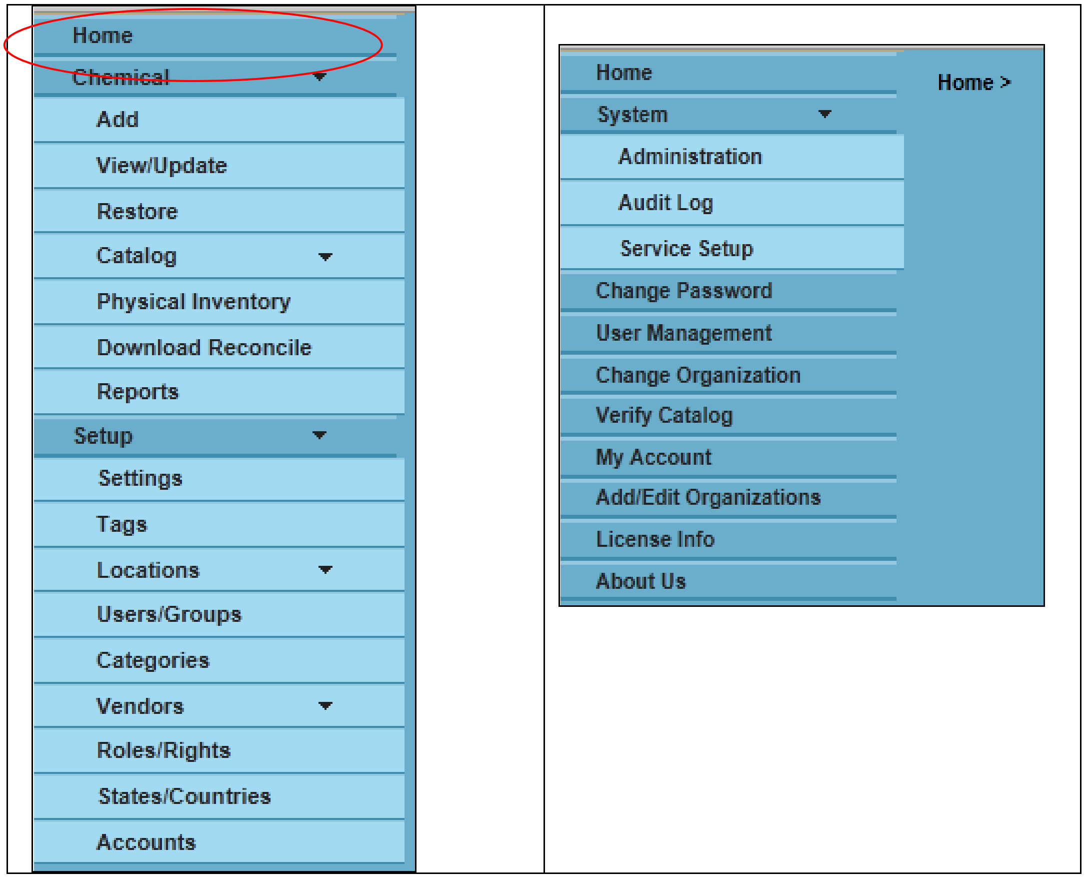
Selecting **Home** from within any module will return the user to the startup menu with one or more of the options shown on the right in the following figure.

Home Menu

- System –
  - Administration – setup parameters
  - Audit Log – details of Add, Edit, Dispose, Restore transactions
  - Service Setup
- Change Password – option that permits individual user to modify password
- User Management – identify all logged in users
- Change Organization – Available only to System Administrators
- Verify Catalog – Available only to users with the Chemical or Biological Verify right
- My Account – form that permits individual user to update of user-specific information
- Add/Edit Organizations– available only to the System Administrators to add a new Organization
- License Info – details of licensed modules and number of concurrent users
- About Us – developer information

Menu Options (continued)

Also note that the location bar always displays the current organization and the appropriate module and function. Only users with access to more than one organization will have the option to Change Organization. And only the System Administrator has the right to add a new organization.



Menu Options in Enterprise

Chemical Inventory Menu

- Add – add a new chemical container to the inventory; you cannot edit an inventory record in Add
- View/Update – search for, edit details, transfer, dispose of chemicals, change a tag number, or print the results of a search or query
- Restore – view disposed chemical records, return disposed item to active inventory
- Catalog – the master listing of vendor and size-specific chemicals you use or might use; comparable to a chemical vendor catalog. Includes delivered and user-added records
- Physical Inventory – define criteria for inventory processes and reconcile inventory data.
- Download/Reconcile – receive and process data from mobile barcode readers
- Reports – the delivered and custom reports for the module and organization

Menu Options (continued)

Biological Inventory Menu

- Add – add a new biological item to the inventory; you cannot edit an inventory record in Add
- View/Update – search for, edit details, transfer or dispose of chemicals
- Restore – view disposed chemical records, return disposed item to active inventory
- Catalog – the master listing of biologicals you use; comparable to a vendor catalog
- Physical Inventory – define criteria for inventory processes and reconcile inventory data
- Download/Reconcile – receive and process data from barcode readers
- Reports – the delivered biological reports for the module

Setup Menu – Organization Specific

Setup menu options are shared by all modules within an organization so that they are entered and maintained consistently.

- Settings – starting values and frequently used supporting data such as acquisition methods, account number, container types
- Tags – tag management for barcode label formats used within the module
- Locations – where items are stored – can be grouped by organization (a sub-set of organizations), building, control zone, floor, room, etc.
- Users / Groups – individuals and groups/departments who use inventory
- Categories – sub-classifications of inventory items
- Vendors – the companies that provide inventory items
- Roles/Rights – the job descriptions and system access permissions associated with users
- Accounts – budget codes to associate purchases with financial system

Organization-specific versus Shared Tables

All users, regardless of the organization or module, share these data sets:

- Categories – optional classifications for your inventory
- Vendors – the source of your inventory
- Catalog with its associated physical, regulatory, safety, MSDS information
- System codes related to the catalog
- State/Country – listing of countries and their associated states/provinces
- Accounts

Reports Menu

Reports are specific to the module and can be controlled at the organization and user level.

- Custom

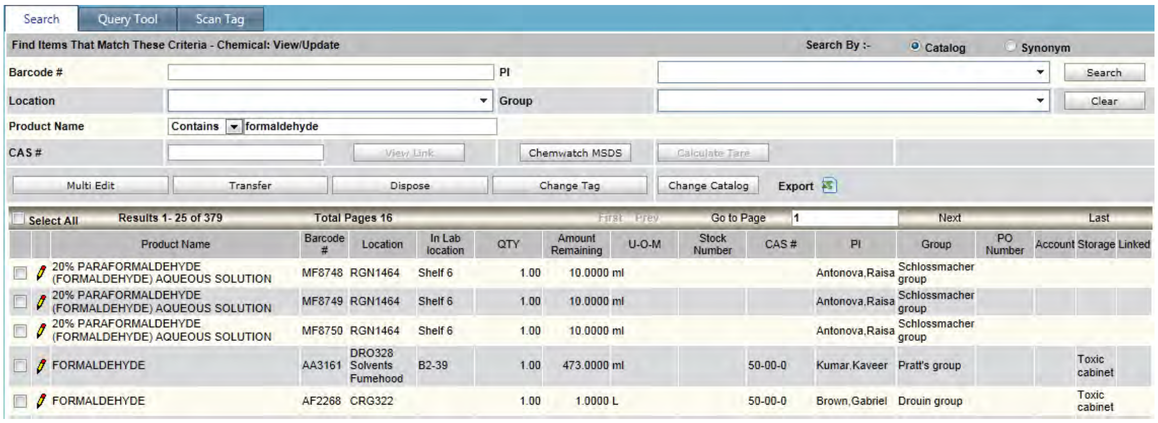
Search and Query

Search and Query Tools

Search and query tools are available to you in the Add, View/Update, Restore, Audit Log, Catalog, and Vendor menu options. The options display on separate tabs at the top of each screen. The Search Results grid displays in the middle of the screen.

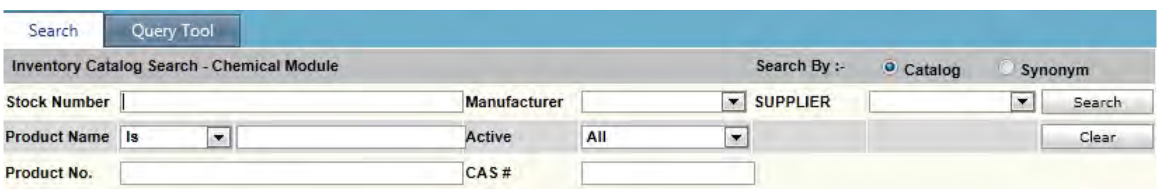
Search

Use **Search** to quickly locate one or more records. Enter a value in one or more of the displayed search fields. The number of records that match your criteria and the total pages required to display your search/query results will display on the Search Results grid.



View / Update Search and Query with Results Grid

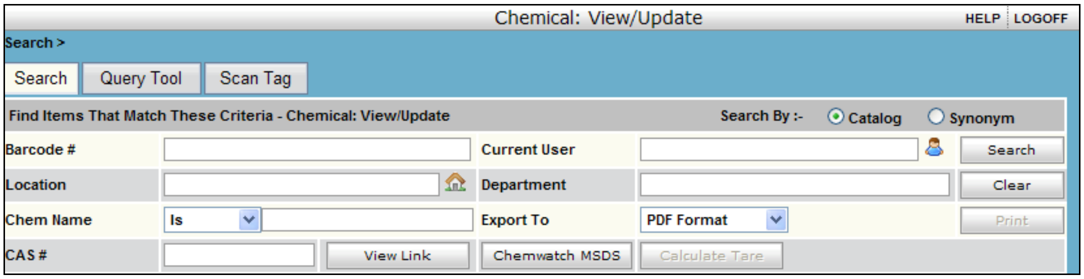
CAUTION: In the ADD or CATALOG windows, do not click **Search** without entering a value in at least one of the fields. Without criteria, 'search' will display all records in your catalog.



Catalog Search Tool

In View/Update, you can also enter the item tag (barcode number), or enter a user, group (department) or location to expand your search for records of on-organization chemicals. You may enter more than one value in the Search fields, for example, CAS=50-00-0 (or 50000) and Department = Biology.

Search and Query (continued)

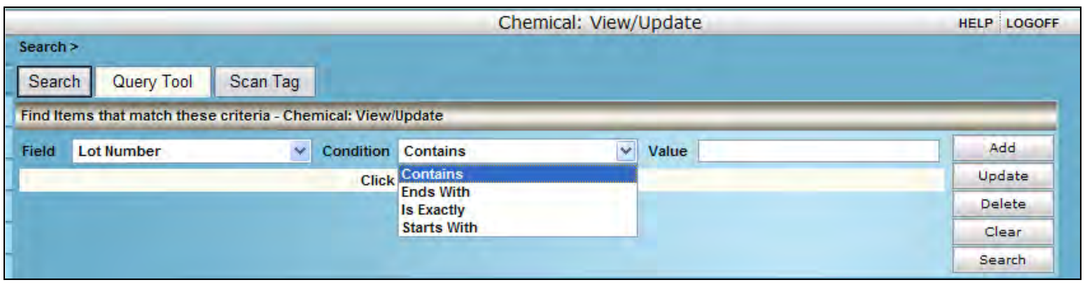


View/Update Search Tool

Note: In Search, the 'Chem Name' field allows the conditions 'Is', 'Contains', 'Starts with', and 'Ends with'.

Query Tool

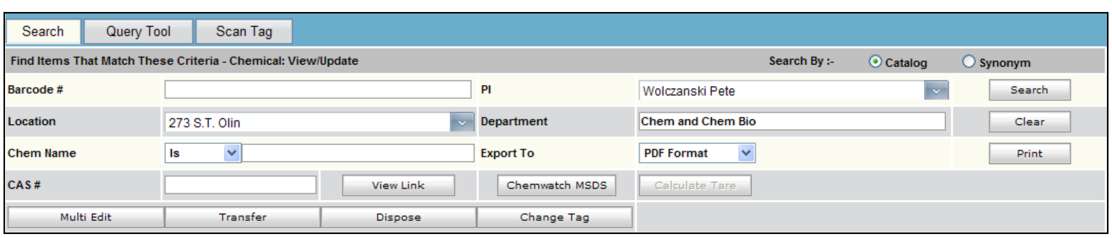
For a more refined query of the inventory or catalog, use the Query Tool and build your search criteria. You can add multiple requirements to the search engine.



View / Update Query

These are AND conditions, meaning that in the following example the query will return every record that is active and that the chemical name contains whatever other value the user enters in the second condition.

CAUTION: The system may return different results in Search and Query. For example, if you associate users and groups with locations and you search for inventory assigned to a specific location, the system will also display the associated user and group as shown below. This search will return all records assigned to S.T. Olin 273 AND to Pete in Chem and Chem Bio.



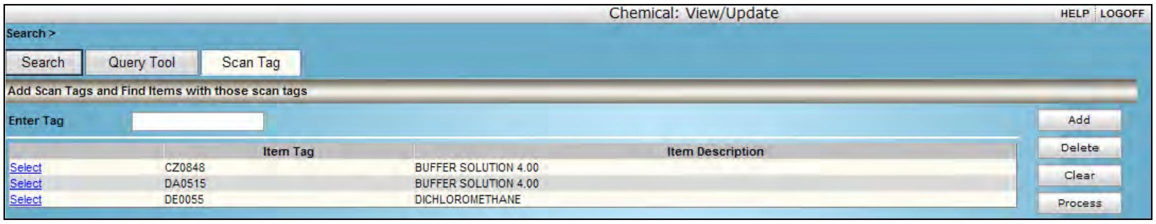
Search for 273 S.T.Olin

If you user the Query Tool to search for all chemicals in the same location, the system will return all records associated with the location only; if the user and group has not been linked to some container records, the number of matching records for the location may be higher.

Search and Query (continued)

Scan Tag

Use the **Scan Tag** option to search for a group of tag values that share no common criteria that would be usable in the Search or Query options.



Scan Tag Search Option

System Management Tasks

System Administrator

The System Administrator is the individual who is responsible for initial system setup of the Inventory Manager. The System Administrator has access to all organizations and to all database records for all organizations. The System Administrator Role may be shared.

NOTE: 'System Administrator' as used in this guide is NOT an information technology role.

The System Administrator is the only individual who can perform these tasks:

1. Define Organizations.
2. Enter the License Key for each organization.
3. Define Password Change Rules.
4. Enter at least one user into the User Group Tree for each organization and assign the Organization Administrator Role.
5. Add one or more users who will share the System Administrator role.

Step-by-step instructions for the system administrator startup tasks are defined in Section 2 of this guide.

' Organization' Administrator

The System Administrator will assign the role of Organization Administrator to an individual who is responsible for a single organization. The Organization Administrator defines Organization Roles and Rights and Organization Users.

The Organization Administrator has access only to database records for his or her organization. The Organization Administrator Role may be shared but only the System Administrator can assign the Role to an organization user.

The Organization Administrator is the only individual who can perform these tasks:

1. Define and assign initial organization roles and rights.
2. Establish Organization Stockrooms.
3. Assign the role of Store Manager to one or more individuals.

Step-by-step instructions for the organization administrator startup tasks are defined in Section 2 of this guide.

VALIDATION

System Management Tasks

Store Manager

The Store Manager is the individual who is responsible for defining store operating rules.

The Store Manager is the only individual who can perform these tasks:

1. Define stores markup policies.
2. Define the stores account number(s).
3. Assign Supply Module access to store employees.
4. Close the stores physical inventory (cycle count).

Step-by-step instructions for the store manager startup tasks are defined in Supply Module documentation.

System Security

Overview

The Inventory Manager has many built-in levels of security. Additional security provided by your MS SQL 2005 configuration and setup is not addressed in this document.

<u>User Name and Password</u>

Users who require access to the database will be assigned an initial password that they will modify at their first logon. Passwords are encrypted. Only users with passwords are allowed access to the system. Roles cannot be assigned to users who do not have a password.

<u>Organization Control for Change Password Rules</u>

Each organization will define the frequency with which users must change their passwords.

<u>Roles</u>

Roles allow organization administrators to assign specific read and write permissions to users for each module. Access to menu options is controlled by User Roles and their associated Rights.

<u>Organization Restrictions</u>

Users have access to and can view only records associated with their organization.

<u>Chemical and User Security Levels</u>

Each catalog entry has a security level between 1 and 10; each user also has a security level between 1 and 10. Users have access only to catalog records with security levels equal to or less than their own security setting. All chemicals and all users have a security level of 1 at system startup.

<u>Group Security</u>

Group Security limits the inventory records users can view or update to those records associated with their group or subgroup.

2. SYSTEM STARTUP

Intended Audience

This section explains initial system setup requirements and is intended for the system administrator, organization administrators, and users who will be involved in customizing each module for organization users.

Getting Started

As you begin to use the Enterprise Inventory Manager, you will complete these steps.

- Identify your System Administrator
- Define one or more organizations
- Define an organization administrator for each organization
- With your colleagues, define data elements required in the shared tables
- Identify users who will share the Verify Catalog role

Within each organization, the Organization Administrators will lead the development of organization setup requirements, create their groups, users, locations, and inventory records.

Login the First Time

To access the Vertére system, enter the URL defined for your installation. You can use Internet Explorer, Foxfire, or Safari as your browser; however, users who will print barcodes with the Inventory Manager must user Internet Explorer as the browser on the workstation that will print barcodes.

Your organization administrator will assign the User Name and the Password you will use to log in the first time.

To log in to the system, enter your User Name and Password and click **Submit** or press **[Enter]**.

The startup user name and password for the system administrator are:

User Name = administrator [not case sensitive]
Password = admin [case sensitive]

If your database has been migrated from another system, a different password will be assigned. The password should be changed immediately.

CAUTION: All passwords are encrypted; take precautionary measures to ensure that the administrator password is not forgotten.

Failure to log in with the correct password after three attempts will be recorded against the user ID you are using and you will be notified of the failed attempt the next time you log in correctly.

Login the First Time (continued)

Login Screen

Each login is audited in a permanent record to help you monitor use of the inventory system.

When you log in the first time, the system will prompt you to change your password. Every user should select a personal password These encrypted values are case sensitive and must be at least 6 characters in length.

The system administrator determines how often users must change passwords and the system will prompt users to change the password as required.

Forgotten Password

If you have forgotten your password, click on the 'Please click here to Retrieve' on the Login screen. Your password will be emailed to the address of record. If your user record does not contain an email address, you will need to contact your organization administrator to secure a new password.

IMPORTANT NOTE: If the System Administrator forgets his/her password, contact Vertére Customer Support. Retrieval of the System Administrator password is not covered by your Maintenance Agreement.

Login the First Time (continued)

Change Password
Change your password the first time you log in. The following Change Password window will display. Complete the following steps.

Step	Your Action
1	Enter your 'Current Password' (the initial password assigned to you) and press **[Tab]**.
2	Enter your new password (at least 6 characters in length). The password IS case sensitive and it cannot include your user name.
3	Enter your new password a second time.
4	Click **Save**. If you have entered a new password and correctly confirmed the password, the system will return a 'Data Saved' message.

Periodic Change Password Reminder

Subsequently, the system will prompt you to change your password in accordance with the password rules defined by your organization administrator. The Change Password window will display and you will change your password as defined in Steps 1-4 above.

To change your password at a later time, select **Home/Change Password** and complete Steps 1-4 above.

System Admin Tasks

Only the individual who logs in as System Administrator may complete the following tasks.

1. Organization Management.
2. License Management.
3. System Setup including Password Change Rules and System Configuration.
4. Organization Administrator Management – adding at least one user into the User Group Tree for each organization and assigning the Organization Administrator Role.

In addition, the System Administrator may guide Organization Administrators in developing policies and procedures that must be in place for the entire organization to meet its objectives. At a minimum, the administrators must agree upon a common set of data elements required for the organization to prepare regulatory reports and meet audit requirements.

Follow the procedures outlined in the following sections to set up one or more organizations.

System Admin Tasks (continued)

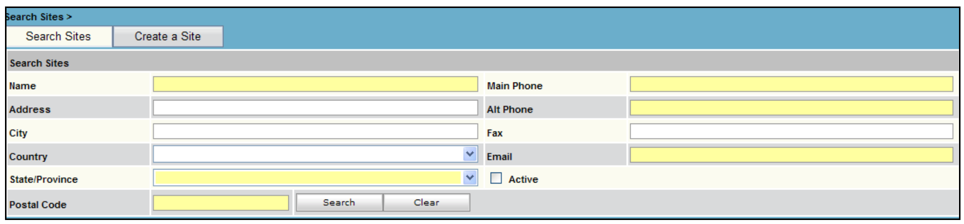
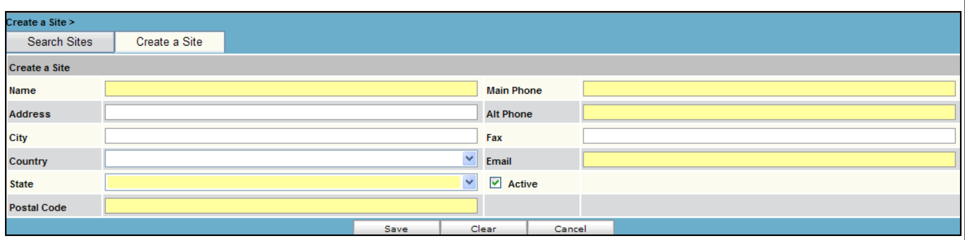
Organization Management

Organization Creation

'Organizations' are the individual business units that will share the Inventory Manager, each with their own inventory records. These units may be different colleges, different departments within a college, or different locations of a company. All will share catalog and vendor information but maintain separate inventory records.

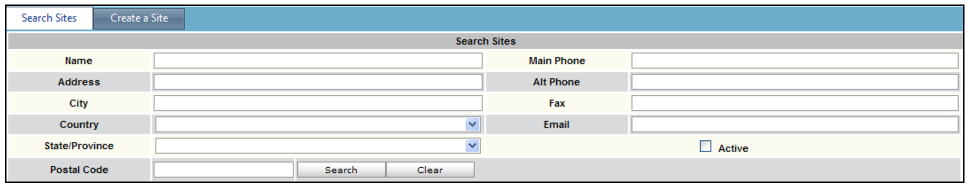
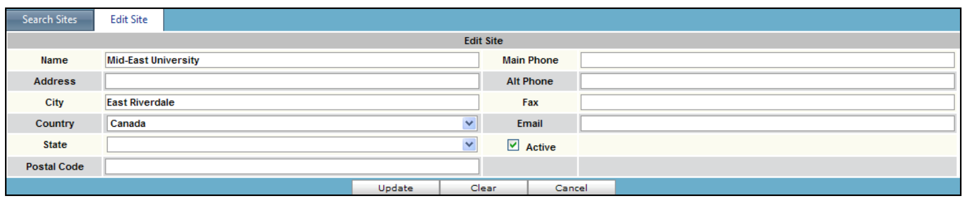
You must define at least one organization.

To create a new organization, complete the following steps.

Step	Your Action
1	Select **Add/Edit Organizations** from the Home menu. The Search Organizations pane shown below will display.  *Search Organizations Option* Enter a value in one or more fields and click **Search** to view an existing organization. Or click Search to view all previously defined organizations, active and inactive. Click **Create an organization** tab to add a new organization.
2	The Create an organization form will display.  *Adding a New Organization*
3	Enter the Name of the new organization. That name will display on all pages.
4	Complete additional address fields if you plan to use the values from this form to prepare reports. Be sure to enter the country if your Inventory Manager is using country-specific regulatory data.
5	States or Provinces will be available for your use. Select your country from the drop down listing. Only Canada and the United States have associated provinces and states in the delivered database. If you need to add states or provinces for other countries, save this record without the state, use the State/Country menu option available on any module menu to update the state table, and then correct the organization record.
6	Place a check mark in the Active field and click **Save**.
7	To add another organization, click **New** and complete steps 3 – 6.

System Admin Tasks
(continued)

To edit an organization record, complete the following steps.

Step	Your Action
1	Select **Add/Edit Organizations** from the Home menu. The pane in Step 2 will display.
2	Enter one or more search values to view a specific organization, or click **Search** to display all organizations, active and inactive.  *Search Organizations Results~~Active and Inactive~~ Organizations*
3	Click the edit icon to display details for a single record, complete your edits, and click **Update.**  *Editing an organization Record*

License Management
Adding an organization License

The initial organization licenses based on your purchase agreement are provided by Vertére with your system. The license keys will be stored on the Inventory Manager CD and will be provided in written form on the packing slip that accompanies your software.

If your IT group has taken the CD you may get a copy of the license key from Vertére's Customer Support team.

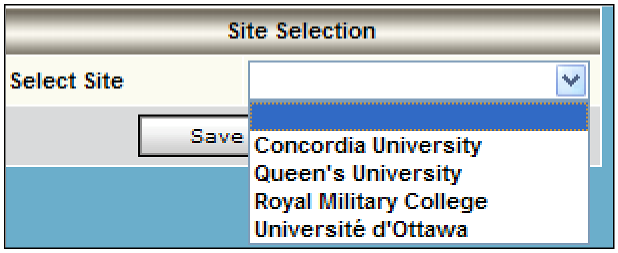
NOTE: A license key is valid one time for one organization only; it cannot be reused for the same organization or for a different organization.

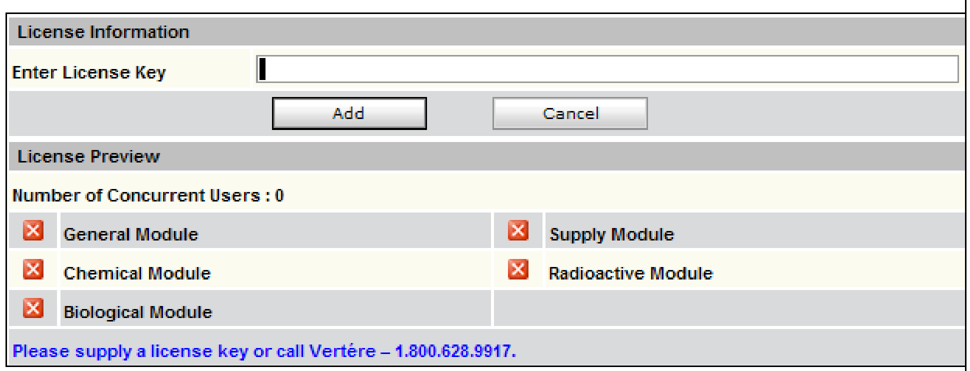
You must enter a different license for each organization.

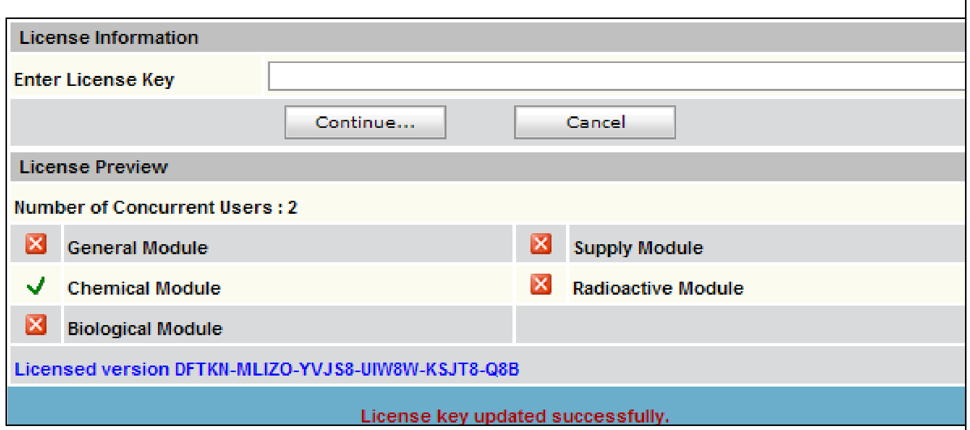
System Admin Tasks (continued)

To provide the <u>initial</u> license for an organization, add one or more organizations then complete the following steps.

<table>
<tr><th>Step</th><th>Your Action</th></tr>
<tr><td>1</td><td>Choose the Change Organization option from the Home menu. Select an organization from the drop down menu.


</td></tr>
<tr><td>2</td><td>The License Information box will display with the following message at the bottom of the form: ‘Please supply a license key or call Vertére – '1.800.628.9917.'</td></tr>
<tr><td>3</td><td>Paste or key in the license key provided by Vertére and click Add. Any error in the typed license key will cause the message ‘Unable to update License Key’ to display.


</td></tr>
<tr><td>4</td><td>The system will display the license parameters for the organization; click Continue to exit the system and activate the license.


</td></tr>
</table>

System Admin Tasks (continued)

Organization Admin Management

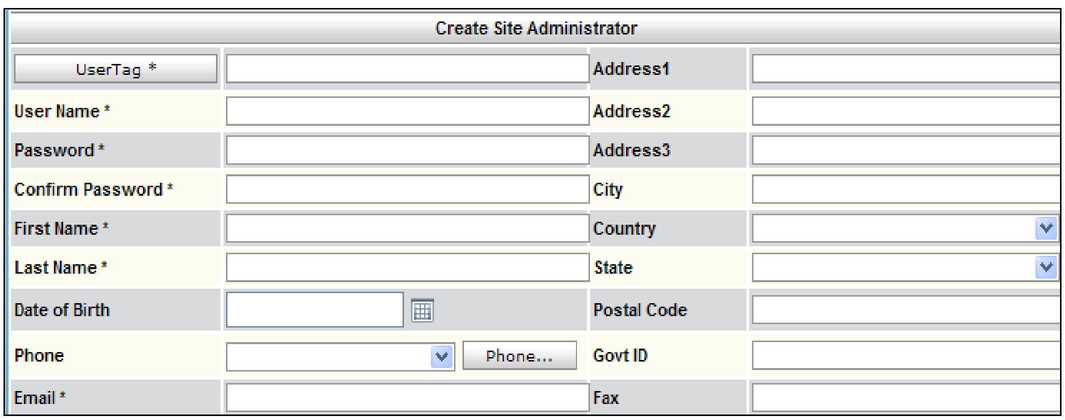
Defining the Initial Organization Administrator

For each organization, the System Administrator must enter at least one user who will serve as the client organization administrator.

To add a user, the System Administrator must complete the following steps.

1. Login.
2. Define one or more organizations.
3. Add the organization licenses.
4. Select a licensed organization using the **Change Organization** menu option.
5. The following prompt will display:

6. Complete the details for the new organization administrator. Fields preceded by an asterisk are required. See Page 2.xx for details about User records.



Create Site Administrator			
UserTag *		Address1	
User Name *		Address2	
Password *		Address3	
Confirm Password *		City	
First Name *		Country	
Last Name *		State	
Date of Birth		Postal Code	
Phone	Phone...	Govt ID	
Email *		Fax	

Initial Organization Administration Form

System Setup

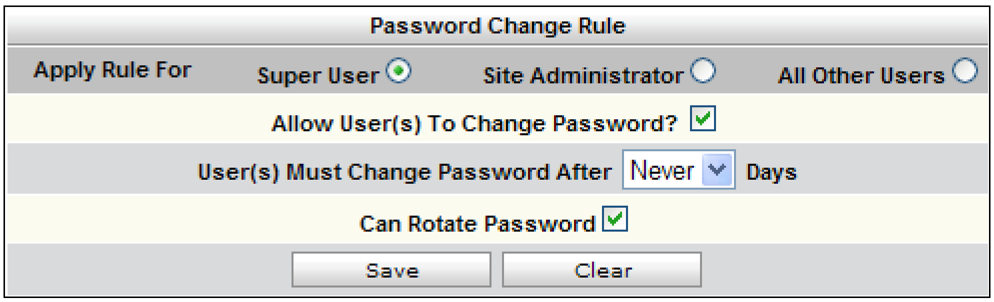
Defining Password Maintenance Rules

The system administrator must define password rules.

Choose the System/Administration menu option and select Password Change Rule.

At the Password Maintenance form, define preferences for the system. The rules will apply to all organizations. Either rule can be changed after it is established.

Rules must be defined even if your users will never need to change their password.



Password Maintenance

'Apply Rule For': The System Administrator can enforce password rules for the Super User (the user with user_id=1), for Organization Administrators, and for all other users. Organization Administrators can apply the rule for their organization and its users. As shown, no organization is selected; therefore, only the Super User option is displayed.

'**Allow User to Change Password**'': Invoke the 'Allow User to Change Password' rule to permit users to change their password and define the number of days before the password must be changed or select the option 'Never', meaning that the password does not need to be changed. If not checked, users may NOT change their passwords.

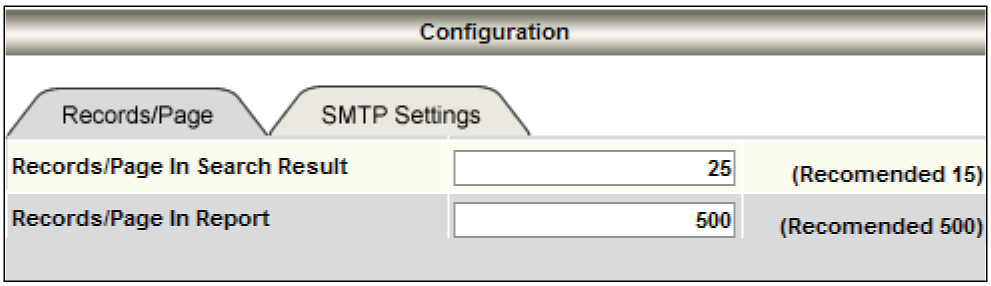
'Can Rotate Password': Allow users to change and then return to a previously used password.

Note: If rules are not defined, an alerting message will display each time a new user is added to the database or an edit is made to a user record.

Setting System Configuration

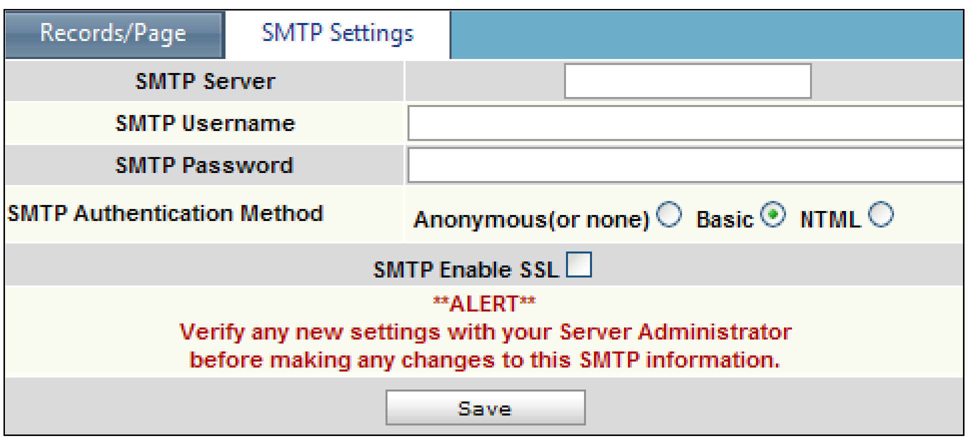
The system administrator must define the Records/Page in search and report output for all organizations.

This option controls the number of rows that will display in results grids as well as the maximum number of records that will be included on a single page in a report. Maximum recommended values ensure fast results; you may exceed the recommendations and test the results within your environment.



System Administrators and Organization Administrators SHOULD NOT MODIFY SMTP SETTING without consulting with your database administrator. This value should be set as the IP address for the system's mail server. This server will be used for emailed alerts within the system. This information must be valid for the Retrieve Password function to be enabled.

System Admin Tasks (continued)



System Configuration

Organization Admin Tasks

About ‘Organization’ Administrators

Organization Administrators are the individuals who share responsibility for guiding organization-specific data entry.

The Organization Administrator Role may be shared but only the System Administrator can assign the Role to an organization user. After you add individuals who will serve as organization administrators, request your System Administrator to identify them as users who will share organization administrator tasks.

The Organization Administrator is the only individual who can perform these tasks:

1. Define and assign initial organization roles and rights.
2. Define the users who will be tasked to ‘verify’ catalog records.
3. Establish Organization Stockrooms.
4. Assign the role of Store Manager to one or more individuals.

Because the Organization Administrator guides organization-specific design, it will be important to refer to the data input screens before making decisions about your organization requirements. In addition, you may wish to collaborate with key end users to document their data requirements and to understand the unique policies and procedures that they may require.

Step-by-step instructions for the organization administrator startup tasks are defined in the following sections.

Organization Admin Tasks (continued)

Module Specific Settings

Setup Menu Options

Use the **Setup Menu** options to customize the Inventory Manager for each module within an organization. If you have more than one organization in your system, the inventory records you prepare for your organization will not be visible or available to users from other organizations. The preferred data entry sequence is

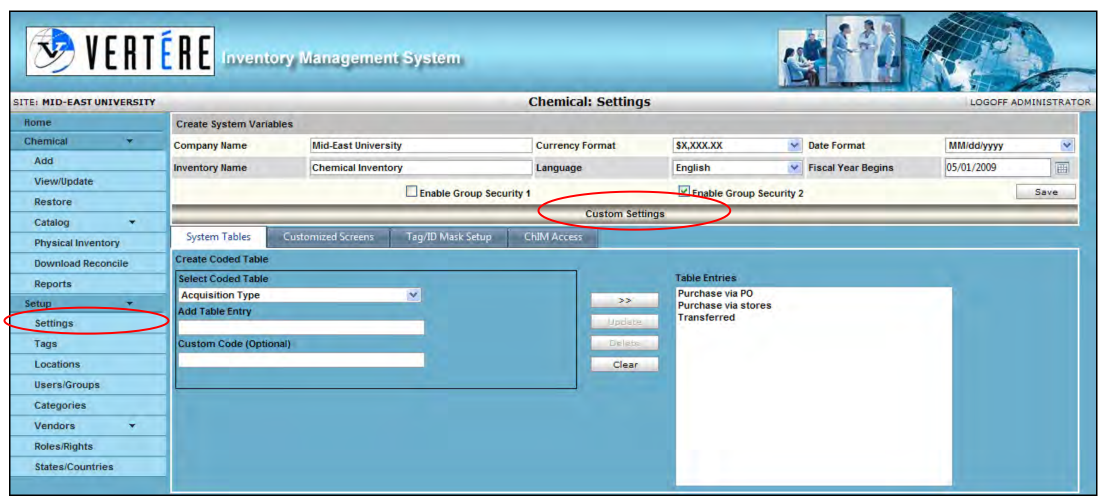
- Define the Tag/ID Mask setup requirements for your organization,
- create Roles with their associated rights,
- add groups,
- add users, and
- add locations.

Remember that all 'organizations' within a system will share System Variables, catalogs, categories, vendors and states/countries tables. Participating organizations must agree on the values that will be used in those tables. As each organization adds to the catalog and vendors tables, those new records will be available to users at all organizations if the user security level permits.

To prepare for organization setup, review the options available to you within each module. The Customized Screens option allows you to customize the appearance, required data elements, formats, tool tips, and other features within each module. Before you add groups, users, and locations, identify which of the available fields you will require, define as optional, or disable.

This section of the User's Guide includes tables listing the fields that apply to container records. Other fields apply to the catalog and to associated physical, regulatory, and safety information.

NOTE: If your system includes conversion of data from an older system, many of these setup decisions were made based on your existing data.



Chemical Module Setup/Settings Options

Organization Admin Tasks (continued)

The values displayed on the System Variables will be used as follows:

Use . . .	To . . .
Create System Variables	Define system name, fiscal year, language (currently English only; French will be added in 2011), date format, and group security status.
Enable Group Security 1	Allow module users to view and edit only inventory records associated with the user's group.
Enable Group Security 2	Allow module users to view all inventory records but edit only those records associated with their group.
System Tables Tab Page	Specific table values you will use frequently; values display in all modules for your organization.
Customized Screens Tab Page	Define required data elements for each module of your inventory records, the field name that will be applied to each, the tool tip you want your users to see, and the default values (if any) for selected fields.
Tag/ID Mask Setup Tab Page	Define the format of tags associated with inventory items, users, groups, and locations if yours is a first-time inventory installation. If your IM system is using converted data, the numbering scheme that you used previously may dominate.
ChIM Access Tab Page	Select the chemical inventory options that will be used at your facility; this option is not available in the Biological Module.

Tag/ID Mask Setup

Tag numbers are the barcoded values that enable you to use scanning technology in inventory tasks. Think of the barcode as the license plate for your inventory items; each item is 'tagged' with a number used to identify it throughout its life cycle.

Tag values are also used for groups, users, and locations to facilitate scanning in such activities as transfers, disposals, and physical inventories. These values do not need to have any intelligence built into them, although they may. For example, most organizations use sequential numbers for location tags but your organization may prefer to use a numbering scheme defined by your facilities management plan in which building 10, room 010 is defined as 10-010. As long as the values are unique within your organization, you may use an existing numbering scheme.

NOTE: If you plan to auto-generate user tag values and you change the format mask defined in system startup, you may need to edit the tag value assigned to the Super User in a start-up system *before* you make the mask change.

IM will auto-generate the tag values with the format and starting value of your choice for each module used at an organization. If tag values are skipped because a user aborts an add operation after generating a tag value, you may reset the starting value and use any skipped tag values or simply key in the skipped value(s).

You may manually enter values that do not match your format or your starting values.

You may auto generate inventory tags but use custom values for other values such as locations, users or groups.

Organization Admin Tasks (continued)

You may use both on-demand printing and pre-printed tags. If you will use pre-printed tags for any of these values and you have enabled auto-generation, the format of the pre-printed tags must match the format you define. If you will use pre-printed tags exclusively for any of these values or if you will use your own internal numbering schema, you can disable the auto-generation function and use any format you choose, including alpha characters.

<u>Auto-Generate Tag Numbers</u> – ***Extremely Important***
If you will use on-demand printing for inventory tags, employee numbers, space inventory designators, or other pre-defined values, auto generate the tags **only** if the format is consistent. For values that will be imported from other systems, you will not be able to auto-generate tags. For example, if you need to use facility plan designators for your locations, you will not be able to auto-generate location tags.

If you are using auto-tag generation, define tag masks and starting values, <u>for example:</u>

	Masks	**Starting Value**		
Group Tags	###	001	Auto-Gen=T	Departmental codes
Inventory Tags	######	000001	Auto-Gen=T	Item identification
Location Tags			Auto-Gen=F	Location codes
User Tags	####	0100	Auto-Gen=T	End user ID

Note: The field length is 15 characters. Do not choose a mask that is longer than you will really need. A 5-or 6-character length is recommended. Remember, the number must fit in barcode format on a small label. Choose a 7+ character value only if you expect more than 1 million container records in your system. Your formatting decisions are difficult to change after you begin entering data. Please choose carefully.

The mask options are:

- @ represents any alphabetic character
- # represents any numeric character
- Any other character is used as a literal
- Literals (alphabetic or numeric) can be used and they will not be incremented
- Spaces (*) are prohibited

Incrementing alphabetic characters must be placed before any incrementing numeric ones.
This is allowed: @@####--starting value might be AA0000
This is NOT allowed: #@##
Here is an example of a mask with a literal: C@###

The default values in the system are formatted as shown below. Your starting value will be the same length; if you start with 1, the start value will be 000001. Because the field type is character, the leading zeros are included.

Group Tag	####	0001
Inventory Tag	######	000001
Location Tag	######	000001
User Tag	######	000002

You might format your inventory tags to begin with the literal ‘C’ (C######) for chemicals and ‘B’ (B######) for biologicals. Or you might format your inventory tags as @@#### and have your starting value be AA0000 allowing the system to automatically increment to AB when your system reaches AA9999.

Organization Admin Tasks (continued)

Turning off Auto-generate – If you will NEVER want to auto-generate tag numbers for a module at your organization, you can turn the feature off. Uncheck the 'Auto generate tags/IDs for this field' box and clear the desired mask field and the starting value.

Turning off the Field Mask – If you will NEVER want the system to force a field format for your labels, delete the values in the 'Enter the desired Mask' field.

Changing the Auto-generation Starting Value – If the system is auto-generating tag values for a field, you can change the starting value at any time but the format must remain the same. If you have started with a six-digit value, your new starting value must also be six digits. The system will never re-use a number at your organization for the selected field.

Customized Screens – Organization and Module Specific

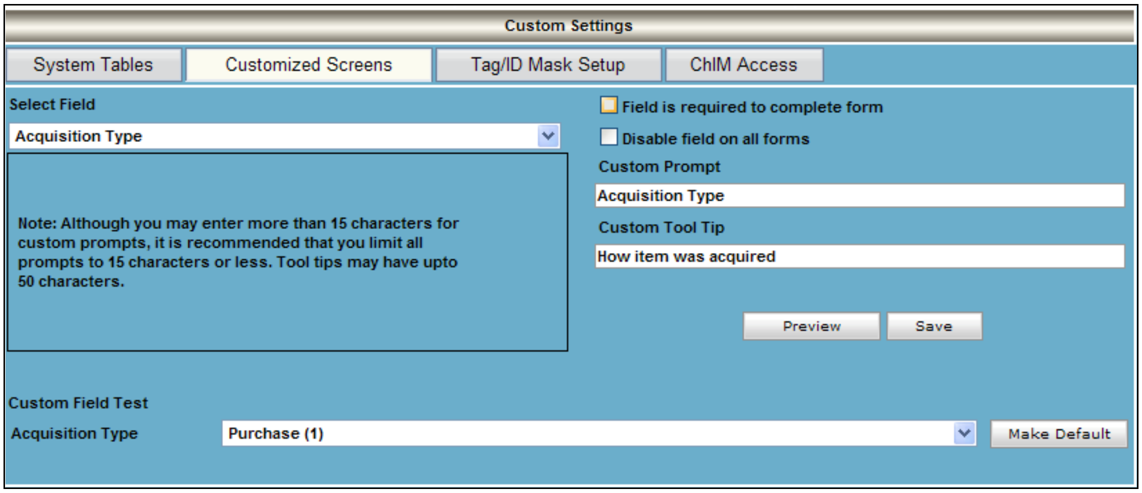
Many field labels are user definable. Any value that relates to the catalog and the chemical substance should be defined with all organization administrators.

All field labels for container/inventory records are organization-specific and are user definable under the Customized Screens tab shown below. You can, for example, change the value 'Item Tag' to read 'Barcode #'.

You can define the following values for each field in the Select Field list. You can reset the required and disabled values after you begin to enter records—however, you cannot change the purpose of the field itself after you begin using it. If you prefer the field to be optional, do not check either the required or disabled boxes.

Value	**Your action**
Field is required	Place a check in the checkbox to set the value as required. Table 1 that follows identifies recommended 'required' fields. Consider the field carefully before setting it to required; you should not, for example, make the CAS number a required data element because many chemicals do not have a CAS. Setting a date field as 'required' will cause the field to auto-populate with the current date when the record is created. This is useful for the 'Receiving Date' but is practical for other date values only if you will know the date of at the time the record is created. **Note**: if you set a field as 'required', it will be required everywhere in the program. The exceptions are the 'User' and 'Group' fields. If you set those fields as required for container records, you will not be forced to define the 'User' or 'Group' associated with locations.
Disable field on all forms	Place a check in the checkbox to disable the field on all forms. The field will not be available for data entry.
Custom Prompt	Enter the text for the label that will appear next to the field in your system. Review the Custom Field Test box to see how the value will display. You can store a blank field if you disable the field.
Custom Tool Tip	Enter a help message to tell users at your organization how to use the field. Tool tips do not display for disabled fields.
Default	Where it makes sense, select a value from the related system table that will automatically display for **all** records, for example 'Purchase' for acquisition method. Use System Tables to add values to the dropdown list. You can change default values when you add a new record.

Organization Admin Tasks (continued)

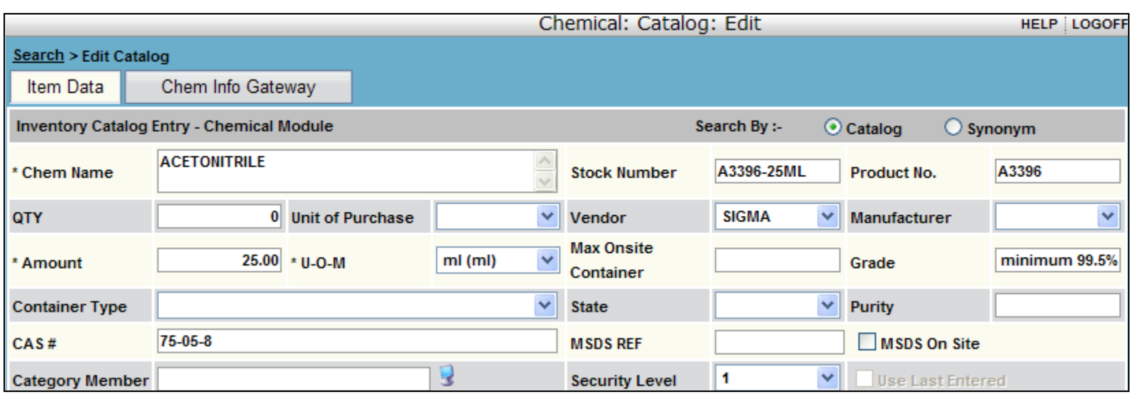


Defining Custom Prompts, Required Fields, and Tool Tips

Complete the following steps to customize your screens:

Step	Your action
1	Select the field from the Select Field drop down.
2	Place a check in the appropriate box if the field is required or disabled. Leave both checkboxes empty if the field is optional. An asterisk will display preceding all required fields.
3	Edit the Custom Prompt as necessary. View the change in the Custom Field Test box at the bottom of the page.
4	Edit the Custom Tool Tip as necessary.
5	Click **Save** after you complete the data entry for a field.
6	To add a default value, select or enter the value, click **Make Default**, then click **Save**. **Caution**: Very few fields have a logical default value.
7	After saving one or more entries, click **Preview** to view the changes. Only fields related to a single container record are displayed in the Preview screen.
8	After a preview, press **[ESC]** or **Return** to leave the preview window.

The resulting changes will display in all windows as appropriate. In the following example, note the asterisk next to the Chemical Name, Amount and unit of measure (U-O-M) Catalog fields.



Chemical Module 'Item Size' Field Label Customized as 'Amount'

Organization Admin Tasks (continued)

Customizable Field Labels

The following tables list the fields for customizing and a brief description of how each field is used. The tables are separated into usage areas: catalog, individual item records, physical, regulatory, and safety tables. Following each table is a screen shot of the associated data entry form.

Some of the fields have a specific use and they should be reserved for that use. 'Reserved' means that logic within the program is dependent upon the field's defined use. For example, the CAS number field has specific validation and formatting rules that would prevent its being used for any other purpose.

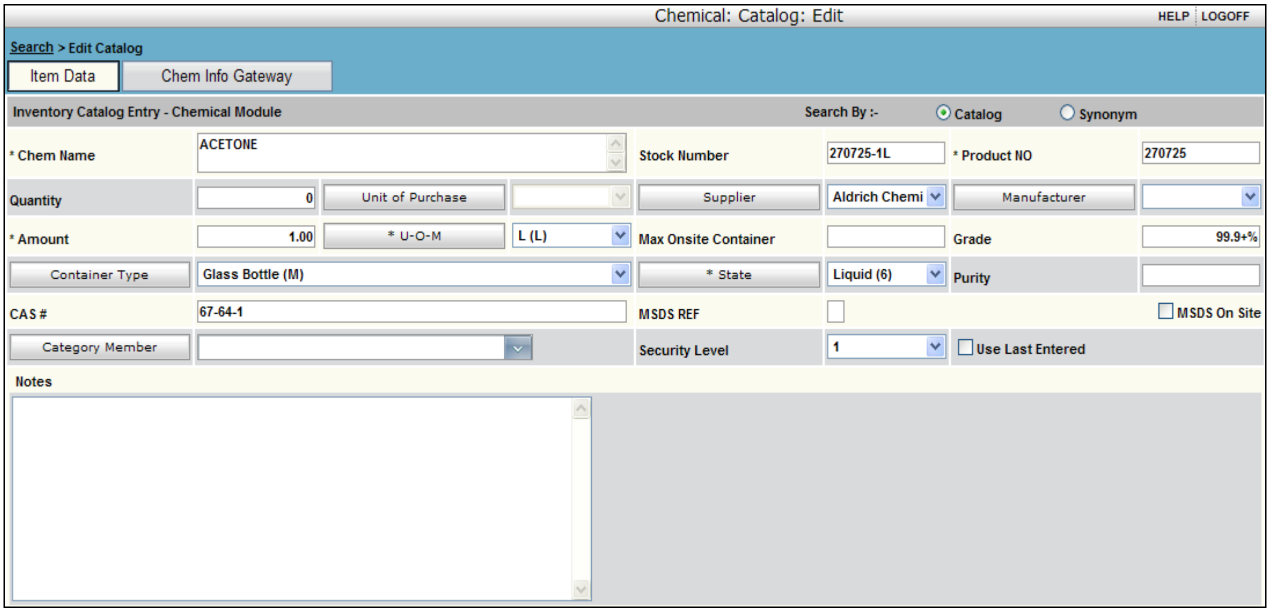
The Description field should be used only for the name of the chemical or biological item, but you can change the label to read 'Chem Name' or 'Name' or any other value you prefer.

Tables 1-4 list the fields with sample field labels. We recommend you set as required the fields marked in bold and proceeded by an asterisk.

Most of the physical data, NFPA, HMIS, and Canadian regulatory field names are not user definable.

Table 1. Catalog Screens - Field Descriptions (bold identifies recommended minimum values)

Customized Screens	Shared - Catalog Field Use	Reserved
CAS Number	Chemical Abstracts Service registry number (12 characters) entered with or without formatting dashes; stored as xxxxxxx-xx-x. Chemical Module only	**Yes**
Category Member	Members of a defined classification; sub designation; each catalog records can be linked to a single category member.	No
Container	Type of container item is stored in, e.g., glass	**Yes**
***Description**	Name of substance as shown on manufacturer label	**Yes**
Grade	Chemical manufacturer designation of chemical purity	No
***Item Size**	Original amount in container	**Yes**
Manufacturer	Company that produces the item	**Yes**
***Product Number**	The vendor's catalog, product or part number	**Yes**
Max Onorganization Container	A limited use field because it refers to all users, all locations within the organization	No
MSDS Ref [not customizable]	A user-definable value identifying a specific data sheet for the product	Yes
MSDS On Organization [not customizable]	A simple checkbox to identify that a data sheet is available for the product	Yes
Note	Additional information about the catalog record	
Purity	User-defined estimation of the substance purity; used to create a separate chemical master ID value	**Yes**
Quantity	The default number of items associated with the catalog record; not needed in ENT Chemical Module	**Yes**
Stock Number	Size-specific supply/part number; drawn from the catalog. Field can be used for other values associated with the individual chemical catalog record; system is delivered with thousands of stock numbers representing the vendor-specific selling size	**Yes**
***Unit of Measure**	Unit of measure for the container, e.g., L (liter)	**Yes**
Unit of Purchase	The purchase unit, e.g., case; reserved for Supply Module	-
***Supplier**	Vendor/Company name that appears on the label of the item	**Yes**



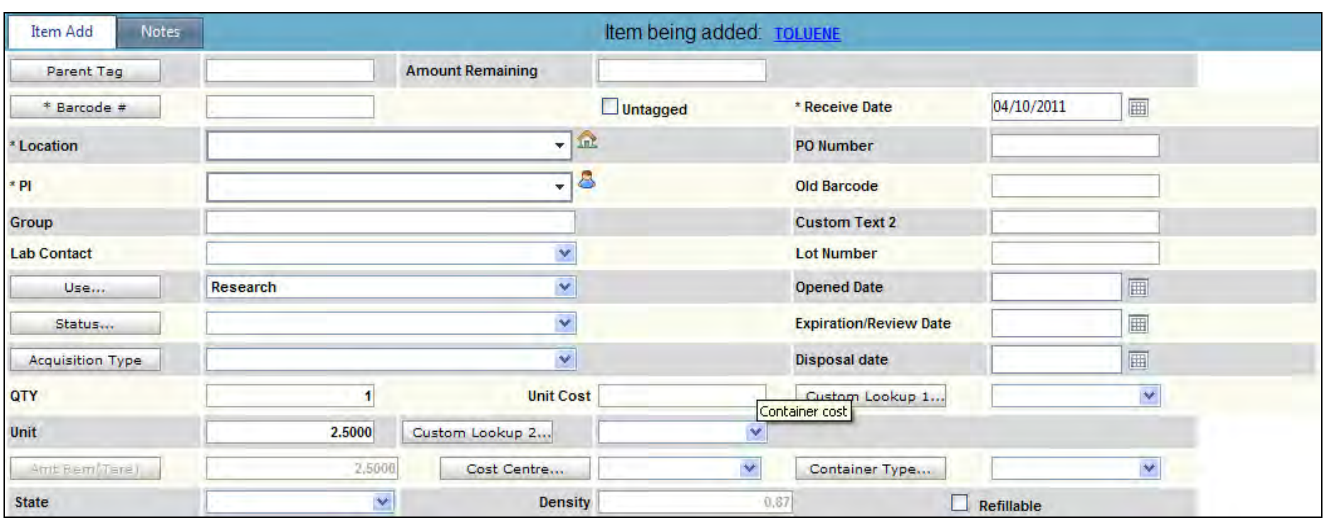
Catalog Data Entry Form

Table 2. Sample Labels and Tool Tips for Catalog Values (bold = recommended required values)

Customized Screen Fields	Label Example	Tool Tip
CAS Number	CAS #	Chemical Abstracts Service registry number
Category	Category	High-level grouping or classification of inventory items; reporting tool
Category Member	Subcategory	Members of the category; sub designation
Container	Container	Type of container in which item is stored, e.g., glass
***Description**	Chem Name	Name of substance as shown on vendor label
Grade	Grade	Chemical grade, e.g., HPLC
***Item Size**	Amount	Original amount in the container
Manufacturer	Manufacturer	Manufacturer of the item
Notes	Notes	Additional information to display with all records
Purity	Purity	The percentage of the specific compound or element in the product
***Product Number**	Product No	Manufacturer's product or catalog number
Quantity	Quantity	Number of containers associated with the barcode; defaults to 1; use>1 only with approval
Stock Number	Stock#	Size-specific vendor or internal supply/part number
***Vendor**	Vendor	Company name that appears on the label of the item
***Unit of Measure**	UOM	Unit of measure for the container, e.g., L (liter)
Unit of Purchase	Unit of Purchase	The purchase unit, e.g., case;

Table 3. Container Field Descriptions (bold identifies recommended minimum values)

Customized Fields	Organization-Specific Inventory Item (Container Record) Use	Reserved
Account Number	Financial reporting; project, charge card, p-card or other tracking number to document how an item was paid for	**Yes**
Acquisition Type	How item was acquired	No
Alternate Group	Not used	–
Alternate User	Identifies another User; data taken from the All Users list	**Yes**
Custom (Date 1)	A user-definable date field	No
Custom (Date 2)	Date to review/remove item from inventory [this field must be used if expiration dates are to be enabled in the chemical module]	**Yes**
Custom (Date 3)	A user-definable date field	No
Custom Lookup 1	A user-definable field for tabled data	No
Custom Lookup 2	A user-definable field for tabled data	No
Custom Text 2	A user-definable field for free-form text entry	No
Custom Text 3	A user-definable field for free-form text entry; reserved for Lot Number or gas cylinder number	**Yes**
Disposal Method	Method used to remove container and chemical from organization	**Yes**
Group	Business unit to which item is assigned	**Yes**
Is Tagged	Logical that defines if item has a physical label attached	No
***Item Tag**	Tracking number (barcode) for individual item	**Yes**
***Location**	Use or storage location drawn from the Location tree	**Yes**
PO Number	Purchase Order Number	No
Quantity	Number of containers represented by the inventory record; defaults to 1	**Yes**
***Receive Date**	Date item is received on organization—not order date; used to calculate the value for Custom Date 2-the expiration or reevaluation date	**Yes**
Status	A user-definable field for tabled data	**Yes**
Unit Cost	Total container cost	**Yes**
Use	A user-definable field for tabled data	No
User	Individual responsible for inventory item	**Yes**



Sample of Customized Container Fields

Table 4. Sample Labels and Tool Tips for Container Values (bold = recommended required values)

Customized Screen Fields	**Label Example**	**Label Example**
Account Number	Cost Centre	P-card number used to pay for item
Acquisition Type	Acq Method	How the item was brought on organization
Alternate User	Grad Student	Backup individual who is responsible for item
Container	Container	Type of container item is stored in, e.g., glass
Custom (Date 1)	Open Date	Date sensitive chemical was opened
Custom (Date 2)	Expiry/Review Date	Date to review/remove item from inventory [this field must be used if shelf life and expiration dates are to be enabled in the chemical module]
Custom (Date 3)	Reserve Until	Hold item until this date; then release for use
Custom Lookup 1	Project	Project or program item will be used for
Custom Lookup 2	Licensor	Agency that licenses the organization for this substance
Custom Text 1	License #	License # provided by DEA, FDA, NIH, etc
Custom Text 2	C of A	Vendor's certificate verification
Custom Text 3	Lot #	Manufacturer's Lot Number, shown on label [this field must be used if lot numbers are to be enabled in the Chemical module]
Disposal Method	Disposal Method	Method used to remove container and chemical from organization
Group	Department	Organizational entity to which item is assigned
Inventory Date	Inventory Date	Date item was last scanned in an inventory
Is Tagged	Untagged	Illogical logical that defines if item has a physical label attached; check only if the item is NOT tagged.
***Item Tag**	Chem Tag	Tracking number for individual item; barcoded value.
***Location**	Location	Use or storage location
PO Number	PO #	Purchase Order Number (from accounting)
Quantity	Quantity	Defaults to 1; use>1 only with approval
***Receive Date**	Receive Date	Date item is received on organization—not order date; if set to required, the value will default to the current date and minimize data entry
Status	Status	Controls on use; life cycle status
Unit Cost	Cost	Total container cost
Use	Use	How item will be used; purpose of the item
User	PI	Principal investigator; individual responsible for item

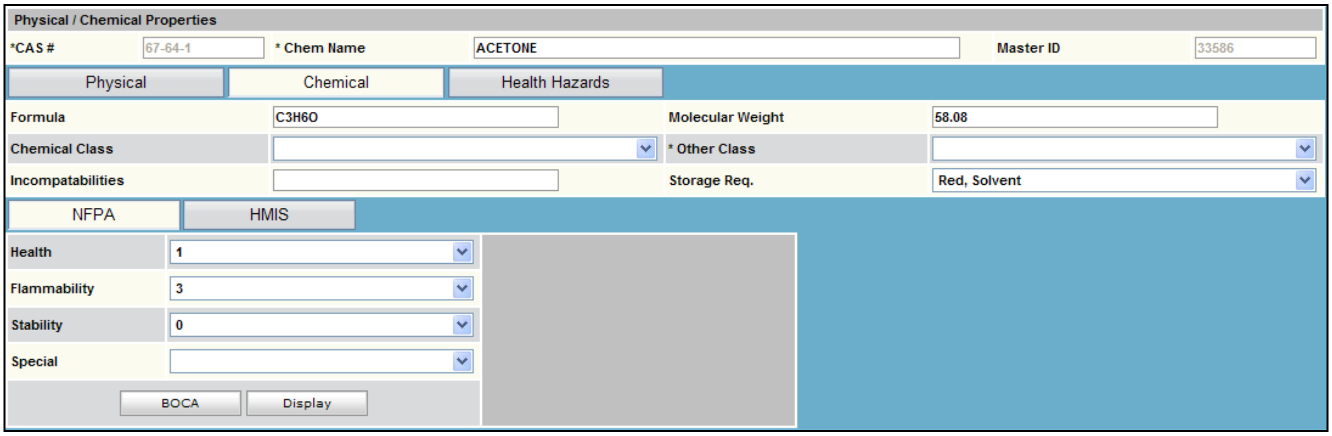
Organization Admin Tasks (continued)

Customizable Labels for Physical Properties Values

The only values that are user definable on the physical properties form are shown in the following table.

Table 5. Field Descriptions for Customizable Physical Properties – Chemical Tab

Customized Screen Fields	Shared Physical Property Fields – Chemical Tab	Reserved
Chemical Class	Chemical groupings such as chelates, phenols	**Yes**
Other Class	User-definable classification	No
Storage Requirement	Vendor or user-defined storage requirement for the substance	**Yes**



Physical Properties Chemicals Tab Form

Organization Admin Tasks (continued)

Customizable Labels for the IBC Table

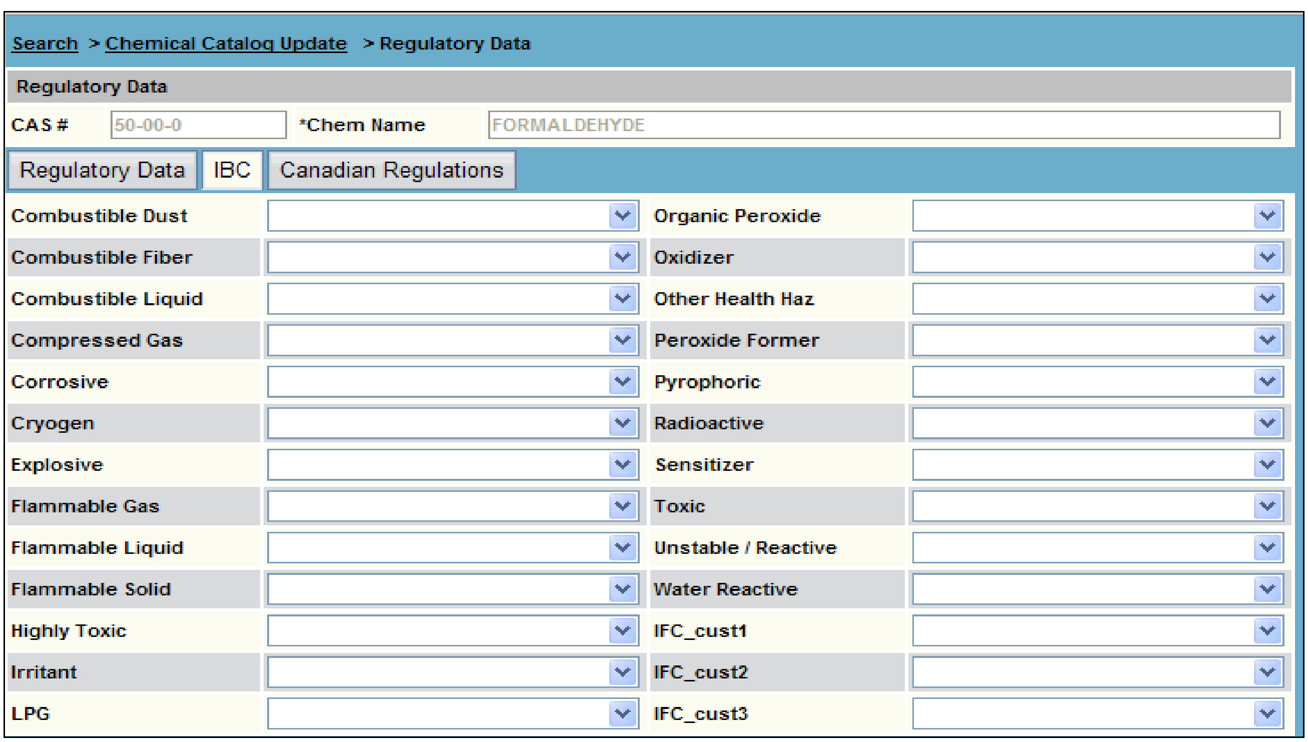
All values in the International Building Code (IBC) table are user-definable, both the field names and the values in the associated drop down lists. If you are not ever going to be required to comply with and report chemical storage by Control Area in accordance with the International Fire Code, International Building Code or the old Building Officials and Code Administrators code you may use this table for other purposes. You will NOT be able to revert readily to IBC values without custom programming assistance so make this decision carefully.

Three fully customizable fields are included in the table to accommodate future changes in reporting requirements.

In a 2009 release, an additional table will be added to the database to permit users to define the exempt amount of each named hazard for each defined control area.

Table 6. Building Code Field Descriptions

Customized Fields	Shared – International Building Code (IBC) Field Use	Reserved
Peroxide Former	Peroxide Former	
Combustible Dust	Combustible Dust - IBC classification	
Combustible Fiber	Combustible Fiber - IBC classification	
Combustible Liq	Combustible Liquid	
Compressed Gas	Compressed Gas - IBC classification	
Corrosive	Corrosive - DOT and IBC classification	
Cryogen	Cryogen - IBC Classification	
Explosive	Explosive - IBC Classification	
Flammable Gas	Flammable Gas - IBC Classification	
Flammable Liq	Flammable Liquid - IBC Classification	
Liq Petroleum Gas	LPG IBC classification	
Flammable Solid	Flammable Solid - IBC Classification	
Highly Toxic	Highly Toxic - Reg and IBC Classification	
Irritant	Irritant - IBC Classification	
Organic Peroxide	Substance is rated as an organic peroxide	
Other Health Hazard	A user-definable list of health hazards not on this list	
Oxidizer	Oxidizer	
Pyrophoric	Pyrophoric	
Radioactive	Radioactive	
Sensitizer	Sensitizer	
Toxic	Toxic	
Unstable / Reactive	Unstable / Reactive	
Water Reactive	Water Reactive	
IBC_cust1, 2 and 3	Optional custom fields for additional fire code hazards	



International Building Code Hazard Classifications

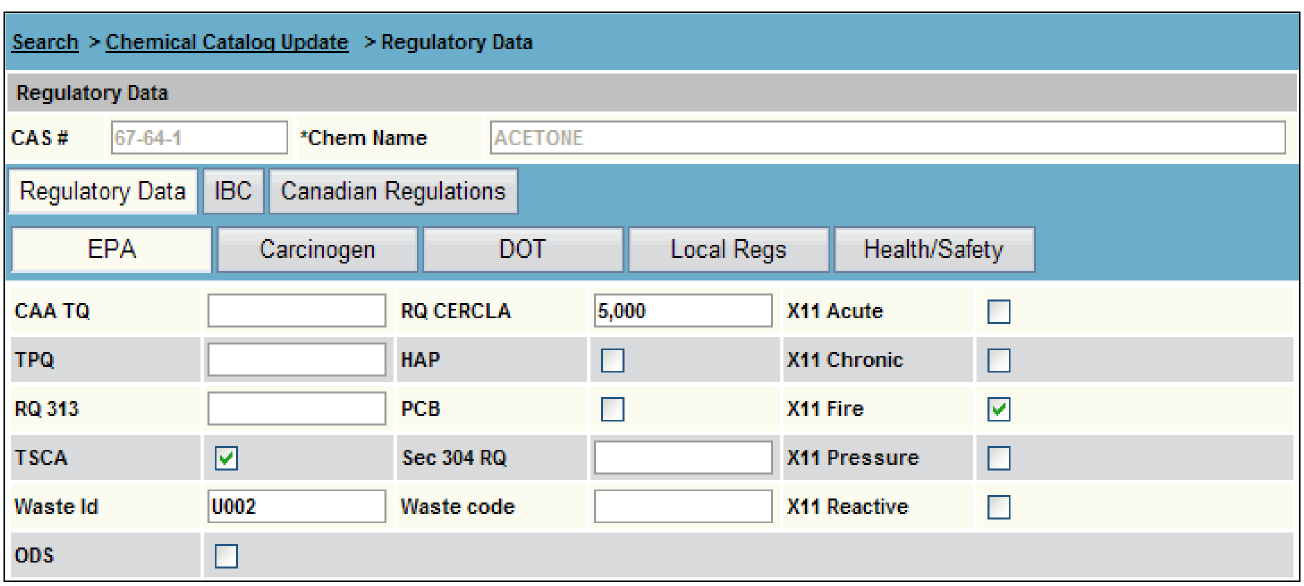
Organization Admin Tasks (continued)

Customizable Labels for U.S. Regulatory, DOT, Carcinogen and Local Values

U.S. regulatory requirements are tracked in several forms; we recommend not changing the function of these fields although you can modify the Tool Tips.

Table 7. U.S. Regulatory Field Descriptions

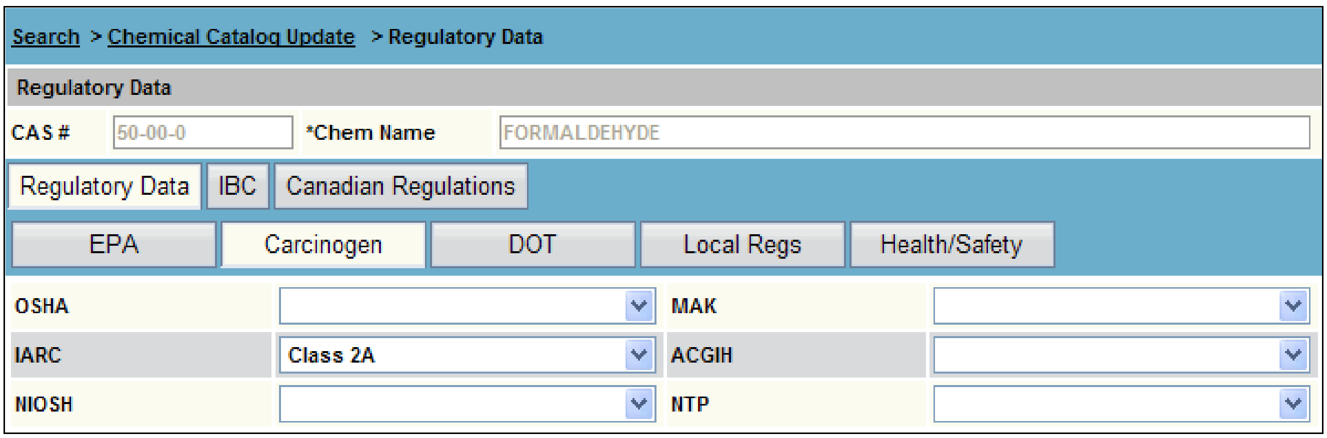
Customized Screen Fields	Shared – US Regulatory Field Use	Reserved
TPQ	SARA 302 Threshold	**Yes**
RQ CERCLA	Reportable Quantity - 40 CFR 302.4	**Yes**
RQ 313	Reportable Quantity - 40 CFR 372.65	**Yes**
CAA TQ	Clean Air Act Threshold Quantity	**Yes**
HAP	Hazardous Air Pollutant	**Yes**
TSCA	Toxic Substance Control Act	**Yes**
OSHA	OSHA-defined Hazardous substance	**Yes**
OSHA TQ	OSHA threshold quantity	**Yes**
X11 Fire	For EPA Section 311 and 312 reporting will track BOCA categories	**Yes**
X11 Pressure	For EPA Section 311 and 312 reporting will track BOCA categories	**Yes**
X11 Reactive	For EPA Section 311 and 312 reporting will track BOCA categories	**Yes**
X11 Acute	For EPA Section 311 and 312 reporting will track BOCA categories	**Yes**
X11 Chronic	For EPA Section 311 and 312 reporting will track BOCA categories	**Yes**
EPA waste1	Part A	**Yes**
EPA waste2	Part B	**Yes**
PCB	Substance is designated as a Polychlorinated biphenol	**Yes**
OHH	Other Health Hazard - See Physical Data, Risk and Safety Phrases	**Yes**
PROC SAF TQ	Process Safety Threshold Quantity	**Yes**
RTECS	Register of Toxic Effects of Chemical Substances	**Yes**
ODS	Ozone Depleting Substance	**Yes**



EPA/OSHA Tracking Requirements

Table 8. Regulatory Data – Carcinogen Ratings Field Descriptions

Customized Fields	Shared – Carcinogen	Reserved
OSHA	OSHA classification for carcinogicity	**Yes**
IARC	International Agency for Research on Cancer rating of carcinogicity	**Yes**
NIOSH	Carcinogicity rating by National Institute for Occupational Safety and Health rating of carcinogicity	**Yes**
MAK	German Res. Foundation for Maximum Allowable Concentration rating of carcinogicity	**Yes**
ACGIH	American Conference of Governmental Industrial Hygienists rating of carcinogicity	**Yes**
NTP	National Toxicology Program rating of carcinogicity	**Yes**



Carcinogen Ratings

Table 9. Regulatory Data - DOT Classifications

Customized Screen Fields	Shared – DOT Classifications	Reserved
DOT Ship name	DOT approved shipping name	**Yes**
DOT class	DOT Hazard class	**Yes**
DOT PG	DOT Package Group	**Yes**
DOT Labels	DOT shipping label	**Yes**
UN NA Number	United Nations shipping number	**Yes**

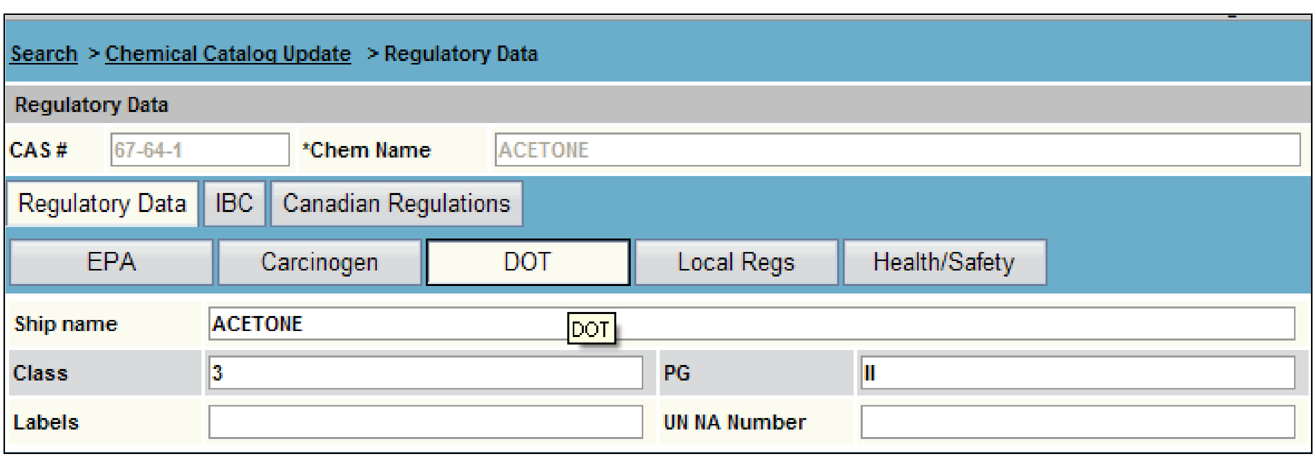
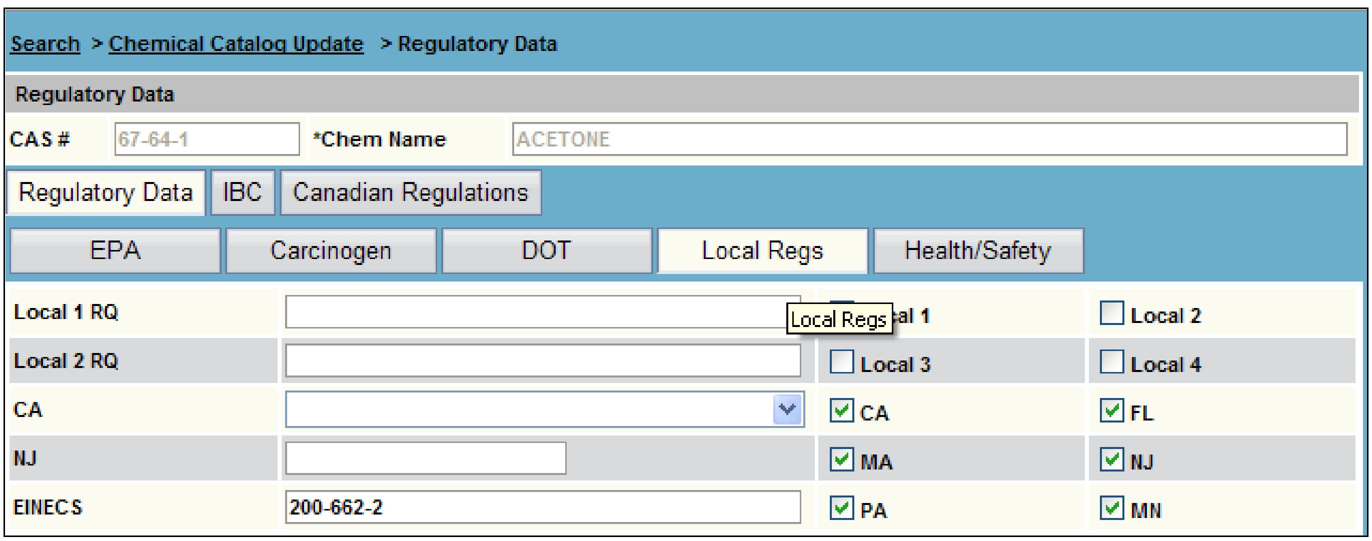


Table 10. Regulatory Data - Local Regs

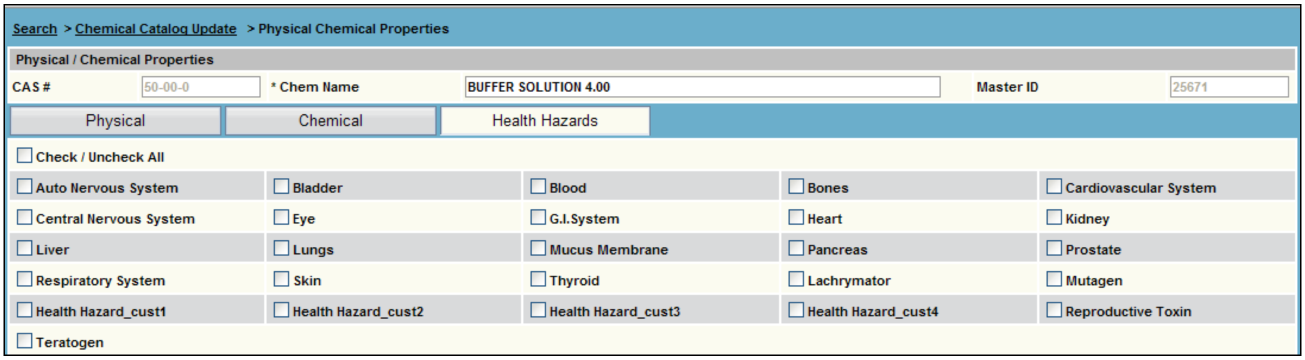
Customized Screen Fields	Shared – Local Regs	Reserved
Local 1	Locally regulated substance	No
Local 2	Locally regulated substance	No
Local 3	Locally regulated substance	No
Local 4	Locally regulated substance	No
Local 1 RQ	Reportable quantity for Local 1 regulation	No
Local 2 RQ	Reportable quantity for Local 2 regulation	No
EINECS	European Inventory of New and Existing Chemical Substances	Yes
EU HAZ Code	European Union Hazard Code(s)	Yes
PROP65	California Proposition 65 regulated substance	Yes
PROP65 Date	Date this chemical was added to the Prop 65 list	Yes



Organization Admin Tasks (continued)

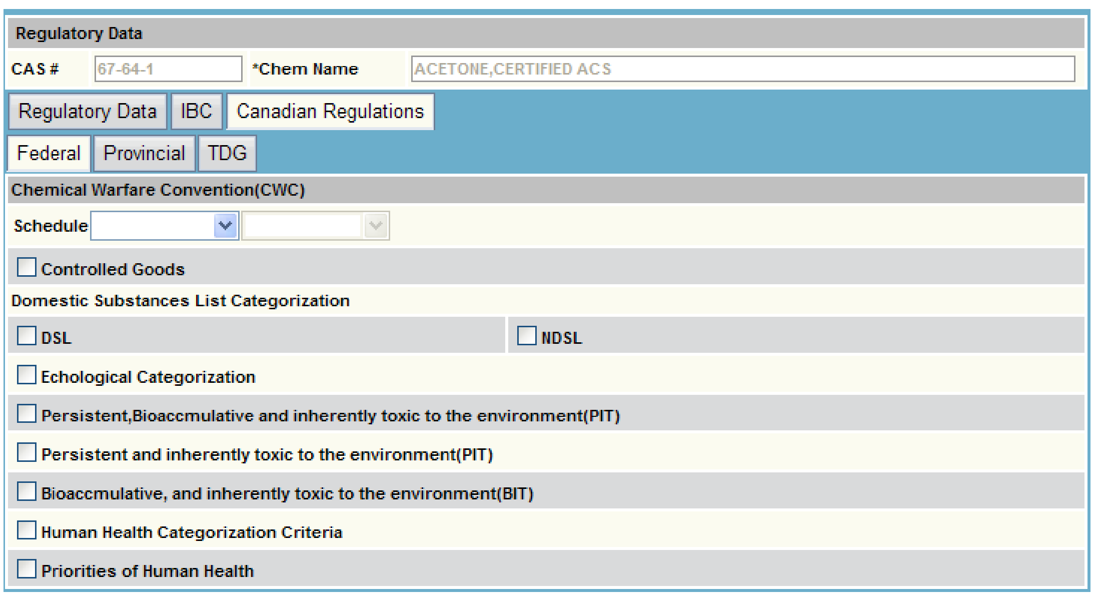
Customizable Labels for Health Hazards and Target Organs

These field names are not user-definable; each field is a logical value. Leave the checkbox blank if unknown or not true; place a checkmark in the box if the substance exhibits the specified hazard.

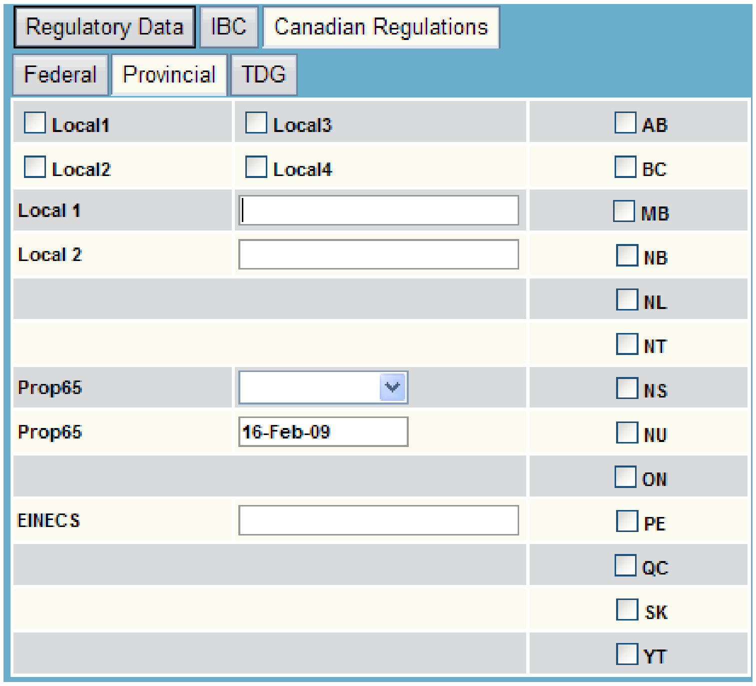


Customizable Labels for Canadian Regulations

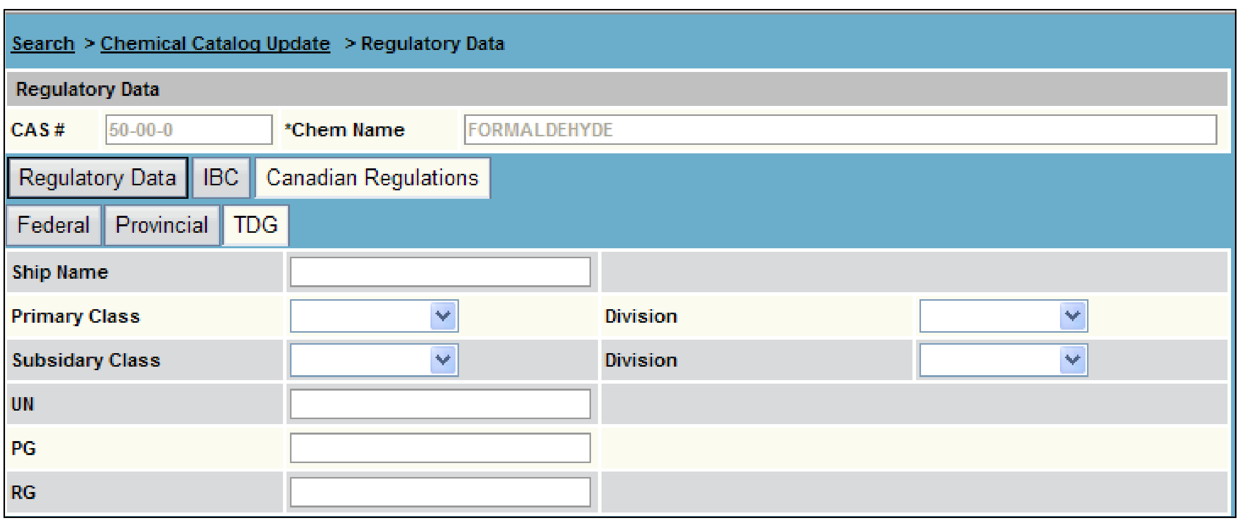
The Canadian regulatory field names used on the Federal, Provincial and TDG screens shown below are not user definable.



Chemical Warfare Convention (CWC) Ratings



Provincial Ratings



Transport of Dangerous Goods Ratings

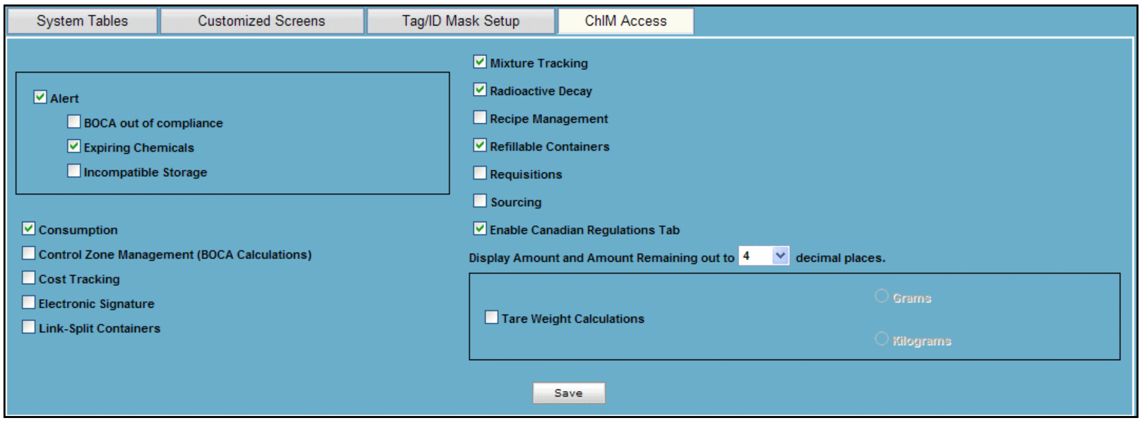
ADD US REGS
TEST SPEED ON STEPPING BACK

Organization Admin Tasks (continued)

ChIM Access

The ChIM Access tab lists the optional functions of the Chemical Module. You can select Consumption, Refillable Containers, Mixture Tracking, Links, Canadian Regulations, Tare Weight and Display to expanded decimal places. Other options will be enabled in later versions.

To enable one or more of these functions, place a checkmark in the box to the left of the option and click **Save**.



Chemical Module Access to Optional Features

System Tables and Custom Codes

Use the system tables to define the values you will use in lookup tables within the Inventory Manager. Define, for example, units of measure, acquisition and disposal methods, storage codes, or container types—values that will be used repeatedly. By defining the values in system tables, you ensure consistent use and reduce repetitive data entry.

You can also redefine entries for many of the physical, regulatory, and safety fields if the delivered values are not applicable to your installation.

When you browse through the list of Custom Coded Tables, you will see that the displayed table name matches the field names you defined in **Customized Screens**. 'U-O-M' in the example below is the customer's choice for the Unit of Measure field.

Use disposal

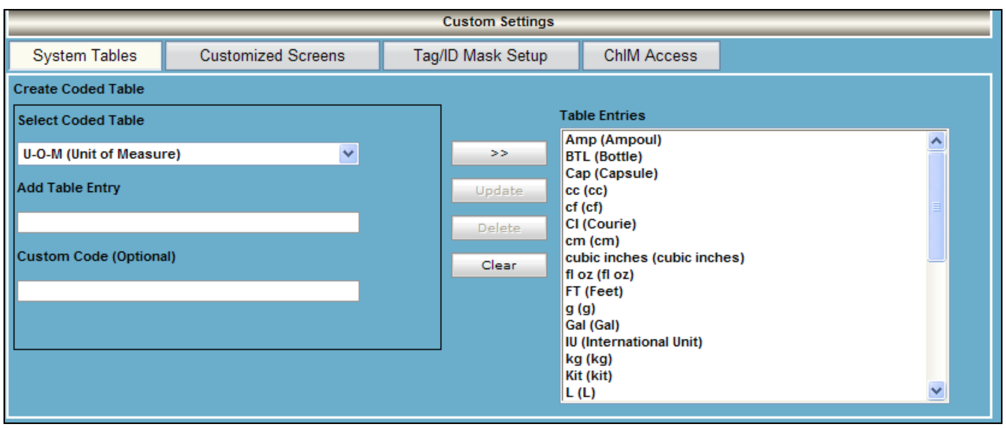
Custom codes are optional values that you can associate with each table entry. The custom codes are short cuts for values that will be scanned. For example, you would scan or key the custom code value of '1' into your barcode reader at the prompt to 'Enter disposal method' instead of keying in 'Wash, rinse, dispose.'

The field can also be used to provide additional information; for example a grant number and a grant name might be used in the accounts field.

Organization Admin Tasks (continued)

If you enter a custom code, it will display next to the table entry, as in **Wash, rinse, dispose (1)**. The custom code must be unique for that table.

To . . .	You will . . .
Add a value	select the table in the Select Coded Table drop down, enter the Table Entry value in the Add Table Entry field, add a custom code if the value will be used in any scanning process, and click **>>** to add the new entry to the Table Entries list.
Edit a value	Select the table in the Select Coded Table drop down, click on the Table Entry to be edited, modify the entry, and click **Update**.
Update a custom code	select the table in the drop down, click on the value in the Table Entry window, change the Custom Code, and click **Update.**
Delete a table entry	select the table in the drop down, click on the value in the Table Entry window, and click **Delete**. **Warning**: Table entries can be deleted only if they are not in use in any of the database tables.
Delete a custom code	Select the table in the drop down, click on the value in the Table Entries window, delete the data in the Custom Code field, and click **Update**.



Sample of Unit of Measure System Table Entries

Here are some examples of values in several of the coded tables. You can delete any value delivered with IM if the value is not in use in the system.

Organization Admin Tasks (continued)

Sample System Code Values

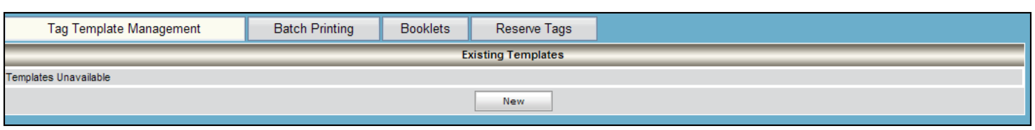
Account Number (Account)	12342-44-0000
Acquisition Type	Purchase (1) Formulated (6)
Grant (Custom Lookup 2)	NIH (1) DOD (2)
Container (Container Type)	Glass bottle (M) Plastic bottle (N)
Disposal Method	Salvage (2) Sold (3) Wash, rinse, dispose (1)
Custom Lookup 1	SPEC 10588
Status	Reserved (1) Available for Sharing(2)
U-O-M (Unit of Measure)	cc cubic inches
Use	Teaching (1) Research (2) Administration (3) Maintenance (4)

System - Tags

The System – Tags menu includes four options:

1. Tag Template Management displaying Existing Templates, if any.
2. Batch Printing
3. Booklets (barcode printer and BarTender not required)
4. Reserve Tags

It is important that you are in the correct organization and module when you define your barcode templates. Many templates may be defined throughout the system. However, when you are in your organization's chemical module, you will be presented with only the labels defined for the field and module at your organization—not the entire listing of defined templates.



Initial Tags Options without Templates

Tag templates, batch printing, booklets and reserve tags options are used to support on-demand barcode printing that requires third party software and a barcode printer.

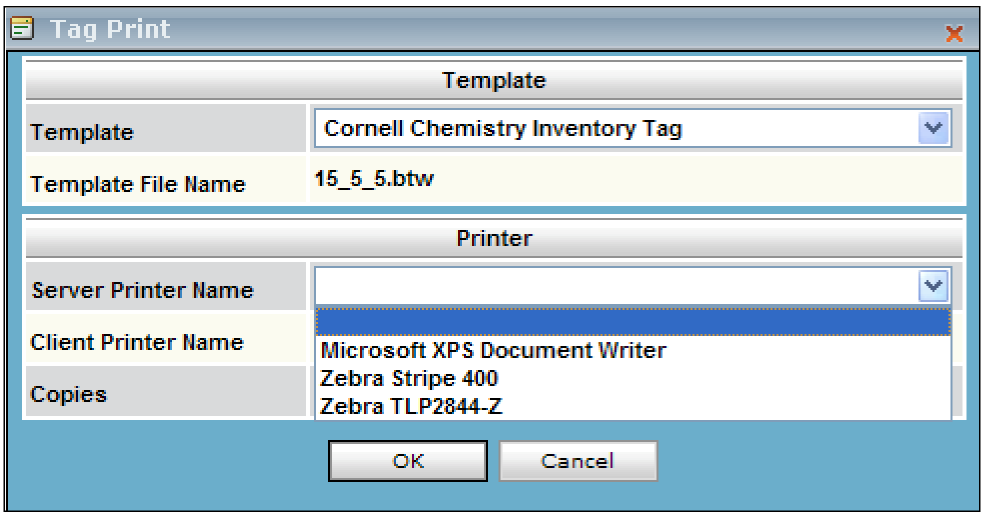
Some Inventory Manager licenses include a license for BarTender, an application that permits you to design barcode labels and define the data that will be printed on them. To help you get started, Vertére provides several sample formats for inventory, locations, users and groups.

Organization Admin Tasks (continued)

Select the Tags menu to store barcode tag formats that will be used at your organization. You can define multiple formats for each label class: Inventory, Locations, Stock Numbers, Users and Groups. For example, you might want one label for peroxide formers and another for other chemicals.

Each organization may use similar formats, but each organization must define its own format. We recommend your including your organization id on your labels to avoid later confusion.

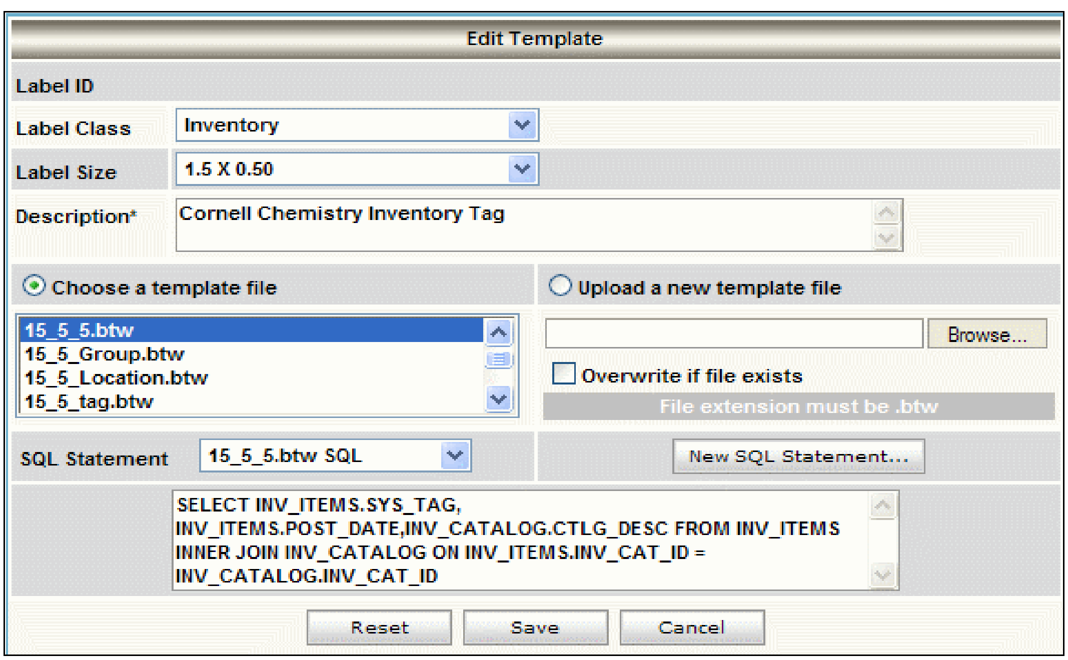
When you select the Print Tag option in Add or View/Update, you will see only the inventory tag options specified for your organization and the specific module.



Organization and Module-specific Inventory Template

Tag Templates

A completed tag template will look similar to the following example.



Completed Inventory Tag Template

***Organization Admin Tasks* (continued)**

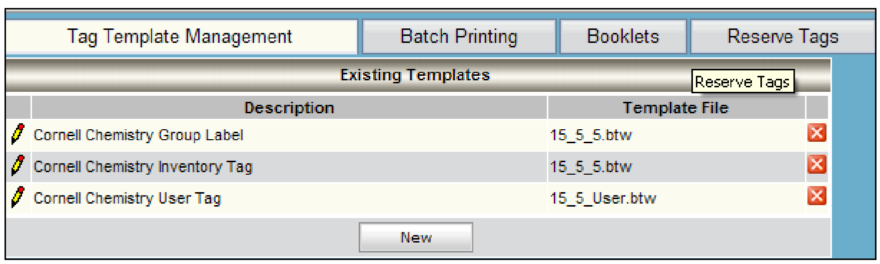
Adding a Tag Templates

To use the default barcode formats delivered with the Inventory Manager, complete the following steps.

IMPORTANT: You must have at least one record in the database before you define the formats. The Inventory Manager uses the record to test the SQL code.

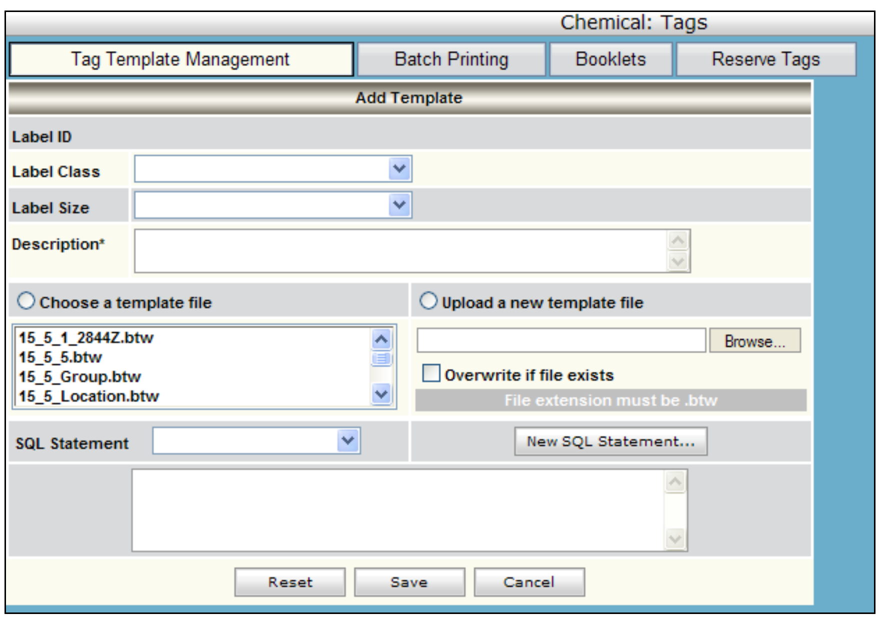
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Open the C:\Program Files\Vertére \Labels folder to display the .btw files. The first two sets of numbers in the btw file names identify the size of the label stock 15_5 = 1.5” x .5” labels. The third set identifies the sample number. Use these numbers to select the correct SQL code in step 2.</td></tr>
<tr><td>2</td><td>Open the file Label \SQL_CODE.txt. This file contains code for several formats. The data elements for each are displayed next to the btw file name. Select the SQL code for the label you prefer, and copy the code using Edit/Copy. Remember! These are samples. You can design your own labels.</td></tr>
<tr><td>3</td><td>

At the System – Tags window, use the Tag Template Management option.



Existing Tag Templates

a. Click **New** on the Existing Templates window.

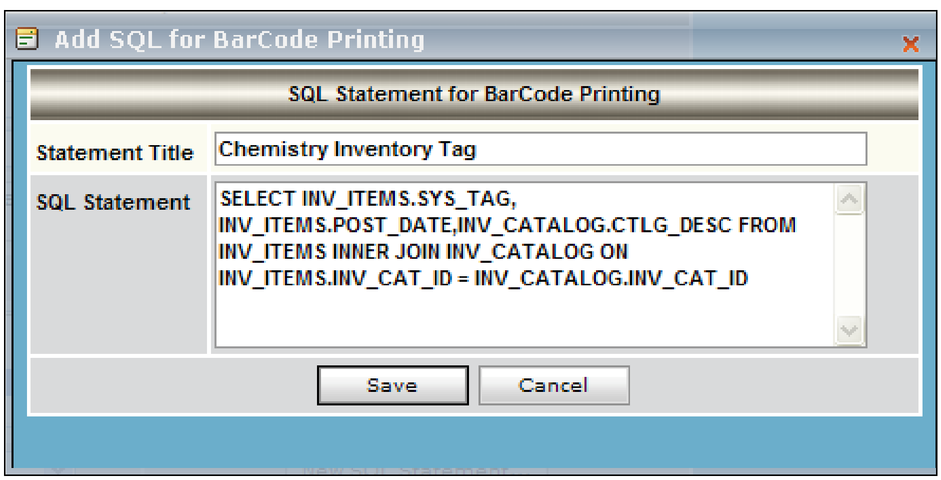


Label Template

</td></tr>
</table>

Organization Admin Tasks (continued)

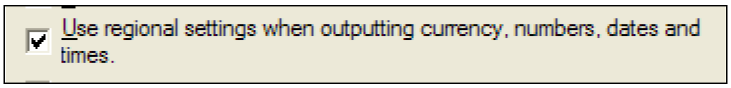
Steps to add label templates, continued.

Step	Your action
	b. Complete the following: • Select the label class from the drop down list. Use **Inventory** for individual containers. • Select the label size from the drop down list. • Enter a short description that will identify this label from others you may define, for example, labels for routine chemicals or for peroxide formers. To use an existing template: ▪ Click **Choose a template file** to use and existing btw file for the label you are adding. ▪ Select code from **SQL Statement** drop down; when the code displays confirm that it is the correct information. ▪ Enter the label name in the Statement Title field. ▪ Type the SQL statement into the Statement field. ▪ Click **Save**. To upload a new template file to the server, • Click **Upload a new template file** to select a new label format. • Browse to locate the new template. • Click **New SQL Statement**. ▪ Enter a short description of the label and then type the SQL code or paste the SQL code that you copied earlier. • Click **Save**.  *SQL Statement*
4	If the label format is valid, a message will display advising you that the format has matching values in the database. Click **OK.**
5	To test the format, either add a new inventory record and click **Print Tag** after you have saved the record, or go to Update, select a single record, click the edit pencil of a record in the Results Grid, and click on the Print Tag button in the top right of the screen.
6	You can print more than one copy of a label.
7	You can create your own label formats by using BarTender, or call Vertére for customer assistance.

***Organization Admin Tasks* (continued)**

NOTE: If you include a date on your label and it does not print in the format you have specified, you may need to modify the setting for your ODBC connection. Complete the following steps or request help from your technology group. **You must know the SQL Login ID and Password to complete this process.**

1. Use Start / Settings / Control Panel and select Administrative Tools.
2. Select and open Data Sources (ODBC).
3. Highlight Vim and click **Configure.**
4. Enter the Login ID and Password and click **Next** two times.
5. Place a checkmark in the field 'Use regional settings . . . .'



6. Click **Finish**.

Tags - Booklets

The Booklet option allows you to print a 'menu' listing of records in the Locations, Users and Groups, Users, or Catalog. Such a listing may be useful for data collection if your locations do not have a physical barcode, or if you are using the barcode readers to transfer chemicals.

CAUTION: Only the Locations option supports printing a portion of the table. If you select the option to print Users and Groups, Users, or Stock Numbers, the entire listing will be printed.

If your workstation supports other output, you can export the file to Microsoft Document Imaging (.mdi) format or to PDF format which will permit you to print only a selected portion of the listing.

We recommend using font size of 24, 26, or 28.

Sample of Users Booklet

Roles / Rights

Use the Roles/Rights menu option to define functional tasks that your users will perform, for example 'Lookup' to provide user access to chemical inventory to search on-organization items but to prohibit editing capability. Available Rights are listed in the following table.

A 'C' in the Module column refers to the Chemical module, a 'B' refers to the Biological Module, and a 'G' refers to the General (Equipment) module, 'FA' refers to the Fixed Asset module. All 'G' rights are available in the Fixed Asset module. Those marked 'FA' are available only if your organization licensed the Fixed Asset module.

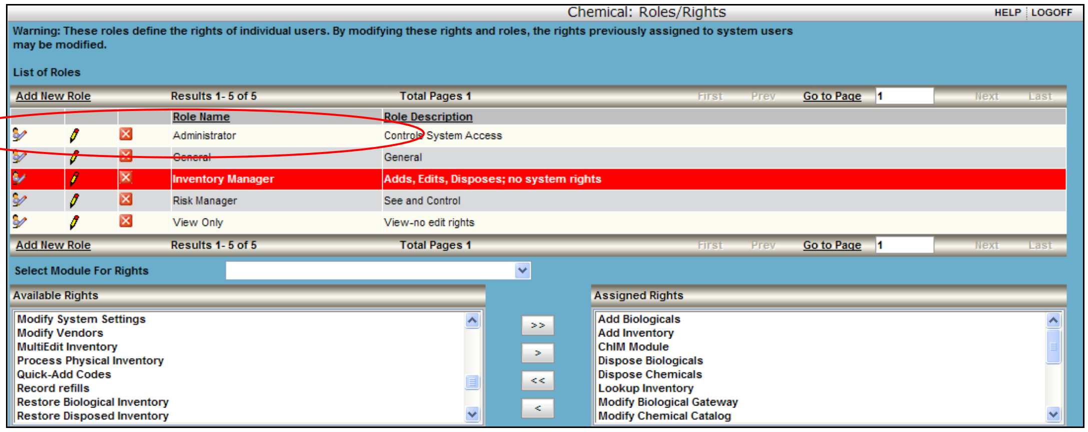
WARNING: An asterisk in the following table signifies an extremely sensitive right; assign with caution.

***Organization Admin Tasks* (continued)**

CURRENT RIGHTS	GIVES PERMISSION TO	MODULE
Add Biologicals	Add biological items	B
Add Inventory	Add inventory in the chemical or general modules	C,G
Age Inventory	Calculate asset age in the fixed asset module	G/FA
Approve Requisitions	Review and approve requisition requests for flagged items	S
Batch/Booklet Printing	Print a series of barcodes for later use or print booklets of location, user, or group tags for use with barcode readers	C,G,B
Change Tag	Replace an old tag number with a new value	C,G,B
Biological Module	Access to the Biological Module	B
Biological Verify	Review and verify new biological catalog records	B
*Calculate Depreciation	Complete the monthly or annual depreciation calculations	FA
Chemical Verify	Review and verify new chemical catalog records	C
ChIM Module	Access to the Chemical Module; no default rights	C
Create and View Reports	Use the default report options	C,G,B,FA,S
Create Store	Identify a space as a 'store' or stockroom	C,B,S
Dispose Biologicals	Remove Biologicals from active inventory	B
Dispose Chemicals	Remove chemicals from active inventory	C
Dispose Inventory	Remove general items from active inventory	G
Download/Reconcile	Import data collected with barcode readers	C,G,B
Edit Depreciation	View and modify depreciation values	FA
* End Physical Inventory	Terminate a physical inventory process	C,G.B
General Module	Access to the General Module; no default rights	G
Fixed Asset Verify	Review and verify new fixed asset catalog records	G,FA
HASP rights	Rights associated with the Signage Program	C
Initiate Inventory	Define physical inventory criteria for process	C,G,B
Lookup Depreciation	View asset depreciation values without edit rights	FA
Lookup Inventory	Use the View/Update function to search records	C,G,B
Modify Catalog Items	Add or edit the general module catalog	G
Manage Store	Define authorized users, review and consoliate requisitions, order and receive inventory	S
Modify Categories	Add or edit the category tree	C,G,B
Modify Biological Catalog	Add or edit the biological module catalog	B
Modify Biological Gateway	Add or edit the biological source, safety, regulatory data	B
Modify Chemical Catalog	Add or edit the chemical module catalog	C
Modify Chemical/Physical Data	Add or edit physical, safety, regulatory data	C
Modify Master Vendor Inventory	NOT IN USE	--
* Modify Roles	Add a Role or Change the rights of a roles	C,G,B
Modify Synonyms	Add or update synonyms associated with category	C,G,B
Modify System Locations	Add or update location tree	C,G,B
* Modify System Settings	Change default values, customized screen	C,G,B
* Modify Users and Groups	Add or update users, user roles, groups, passwords	C,G,B
Modify Vendors	Add or update vendors list	C,G,B
MultiEdit Biological Inventory	Change more than one value for multiple records	B
MultiEdit Chemical Inventory	Change more than one value for multiple records	C
MultiEdit Inventory	Change more than one value for multiple records	G
Prepare Requisition		S
Prepare Requisitions for Others		S
Process Requisitions		S
Process Physical Inventory	Update inventory records with downloaded data	C,G,B
Quick-Add Codes	Add on-the-fly to system coded tables	C,G,B
Record Consumption	Enter details of chemical usage	C
Receive and Process Requisitions		S
Record refills	Enter details of refilled containers	C
Restore Biologicals	Return disposed Biologicals to active inventory	B
Restore Chemicals	Return disposed containers to active inventory	C
Restore Disposed Inventory	Return disposed general items to active inventory	G
Transfer Inventory	Relocate inventory and/or assign to new users	C,G,B
Update Inventory	Access the View/Update menu	C,G,B

Organization Admin Tasks (continued)

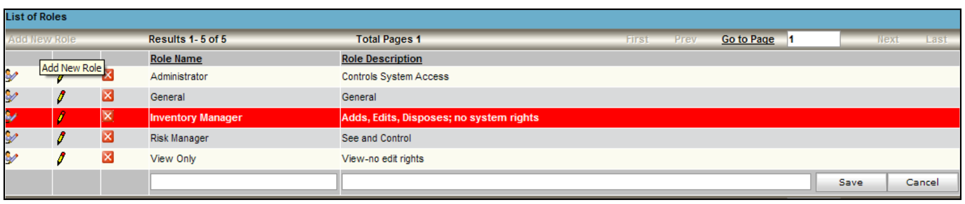
Click the **Select** icon in the Roles list on the top half of the screen to display the current rights and available rights associated with that role. The Administrator and General roles are delivered with the system. All system rights are assigned to the System Administrator (Super User) and the role cannot be modified. Although only one person can serve as the System Administrator, more than one person can have Administrator rights. Each will log in with his or her own user name and password.

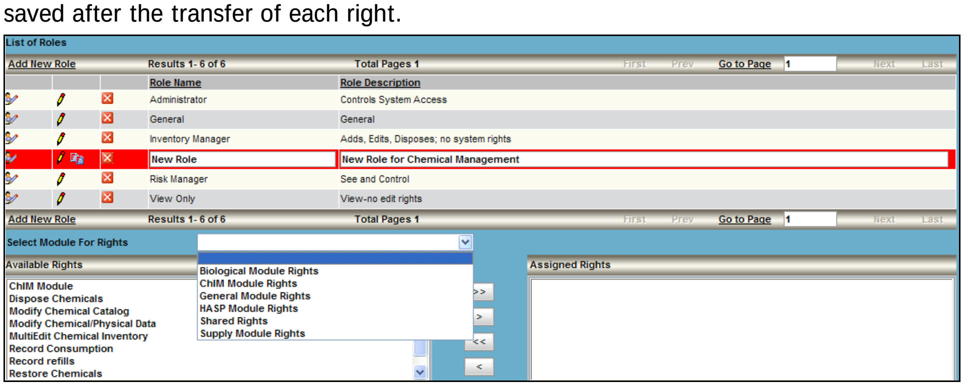


Defining Roles and Rights

To add a role and rights complete the following steps:

Required field: Role

<table>
<tr><th>Step</th><th>Your action</th></tr>
<tr><td>1</td><td>Click Add New Role shown at the top left of the results grid. Enter the Role Name in the new row that displays at the bottom of the grid.


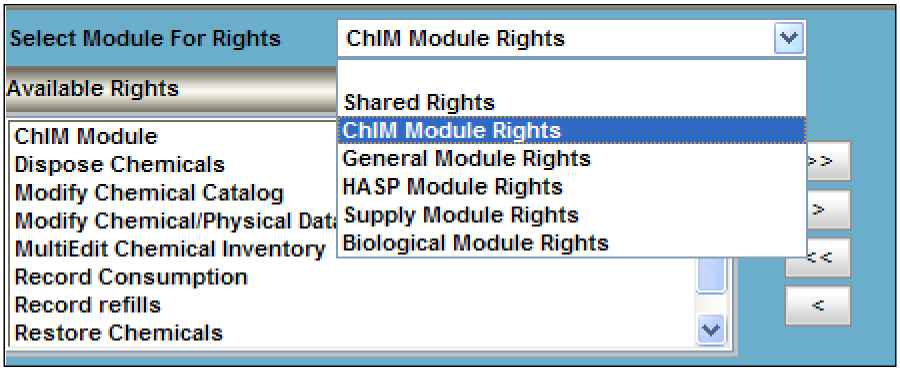
Add New Role Fields to Role Name List</td></tr>
<tr><td>2</td><td>Enter the Role Description; this will be the job description for users with this role.</td></tr>
<tr><td>3</td><td>Click Save. The new role will be displayed in alphabetic order in the List of Roles. (See the Role Name below that says ‘New Role’.)</td></tr>
<tr><td>4</td><td>Click the Select icon in the left-most column to enable the module and rights options.</td></tr>
<tr><td>5</td><td>To add or modify the rights for a given role, click the Select icon to bring the rights into view for the desired role. Assign rights associated with the role. The data are saved after the transfer of each right.


Adding Module Specific Rights</td></tr>
</table>

Organization Admin Tasks (continued)

Add a role and rights, continued

Step	Your action
6	Highlight one or more of the rights in the Available rights column and click **>** to add those rights to the new role. [To select more than one right, hold down the **ctrl** key and select the rights with the left mouse.] To limit the available rights to those associated with only one module, choose the module (General, ChIM, Biological, Supply, etc.) for the current role.



Chemical Module Rights screen

To edit a Role or the rights associated with a role, complete the following steps.

Step	Your action
1	Click the select icon in the far left column of the roles gird. The row will be highlighted in red.
2	Click the pencil icon to edit the role name or description associated with the role.
3	Click the pencil icon again to update and save the role with your edits; click the cancel icon to discard your changes.
4	To add or modify the rights for a given role, click the select icon to bring the rights into view for the desired role. Assign rights associated with the role. The data are saved after the transfer of each right.
5	Click the red x icon to remove a role from your list of roles. You cannot delete a role that has been assigned to a user.

Organization Admin Tasks (continued)

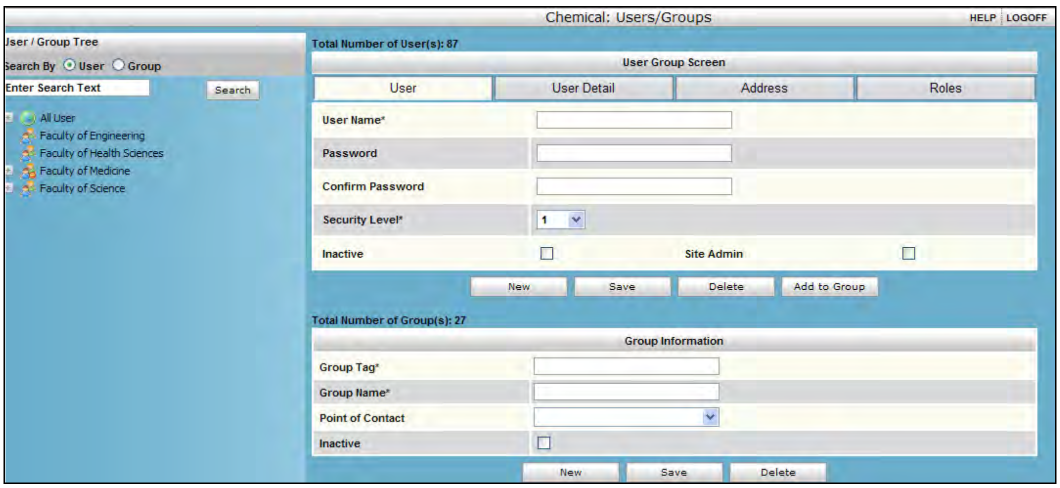
Users / Groups

Use Setup / Users Groups to add and maintain users and groups in your system. SEQUENCE

Users are all individuals who will be responsible for inventory or who will have access to the Inventory Manager. Groups are the organizational or process-related entities with which end users will be associated. You can link users with their respective groups and associate the user and group with inventory items. Or you can link only users or only groups with your inventory items. Design your tree to help you meet organization objectives for inventory system: how will you report on your inventory, how will you track accountability?

Groups

You can have groups, subgroups, and sub-subgroups; however, start simply until you understand how your structure will be implemented.
SEARCH RULES
Recommended Order of Entry - We recommend that you add Groups and then add Users. As you add users, they can be associated with their group or groups and the Point of Contact can be defined for the Group.



User Group Tree

Adding a Group. To add your initial first-level Group, complete the following steps. (If you wish to add more first-level Groups, start with Step 6, then go back to Step 1.)

Required fields: Group Tag, Group Name

Step	Your action
1	Click **New** beneath the Group Information box at the bottom page.
2	Enter the 'Tag' value if auto-tag is turned off for groups.
3	Enter the Group Name; this will be the name of the organization unit.
4	Click **Save**. • If the Group is a first level group, the save will occur automatically. • If the Group is a sub-level group, you will be prompted to confirm that you want to 'Add X to Group Y'.
5	You cannot enter the optional Point of Contact until you have added users.
6	To add a second first-level group, click on **All Users**. This will prevent your new first-level group from becoming a child of the first group you entered.

Organization Admin Tasks (continued)

Adding a Subgroup

Step	Your action
1	Highlight the first level group (the parent), then click **New** next to the Group Information box at the bottom of the window.
2	Enter the 'Tag' value if auto-tag is turned off for groups.
3	Enter the subgroup Group Name.
4	Click **Save** and confirm that the subgroup is being attached to the correct first level group.
5	You cannot enter the optional Point of Contact until you have added users.

Editing a Group

Step	Your action
1	Click on the group name in the User/Group tree.
2	Edit group information and click **Save**.

Deleting or Inactivating a Group

Step	Your action
1	Click on the group name in the User/Group tree.
2	Click **Delete** to remove the group from the User Group tree. **NOTE**: If inventory records or users are associated with the group, you will not be able to delete the group from the system. It will be necessary to check the 'Inactive' box. Inactivating a group automatically inactivates all users within the group; it does not affect the same users who may be members of other groups. Inactive groups are not displayed in the *add* or *transfer* procedures. Inactive groups and their users cannot have inventory records assigned to them; existing inventory records are not modified until you transfer items from the inactive group to another group.
3	Click **Save**.

Organization Admin Tasks (continued)

Users

Use Setup – Users / Groups to add and maintain user records.

Your All User list will include all individuals who will have log in rights to the Inventory Manager. It may also include individuals who will serve as custodians for inventory items but who may not need access to the system. The User and Alternate User fields associated with each inventory item show responsibility or ownership (or custody) of the items. Adding Users is a multi-step process.

Adding a User. Complete the following steps.
Required fields: User Name, Tag, Name 1 and Name 2.

Step	Your action
1	Click **New** next to the User tab. (Do not enter data without first clicking **New**).
3	Enter the User Name on the User Detail tab; this will be the User ID the individual uses to log in. Many organizations use the user name required by local network logins.
4	Only users who need access to the inventory system need a password. Users without passwords may be responsible for inventory but may not log into the system. Passwords must be added before you can assign a role to the user in Step 9.
5	Assign passwords of at least 6 character lengths only to those users who will have a Role with Rights to access the system. [Users will be prompted to change their password when they first login.]
6	Security level defines 'what' inventory items the user will be able to view. All users default to security level 1; possible values are 1 to 10, with 10 being the highest.
2	Enter the Tag value on the User Detail tab associated with this user if user tags are not autogenerated.
7	On the User Detail tab, • Put user's **first name** in Name 1 field; we suggest you use Upper/Lower case for names. Do not enter commas; they are provided. • Put user's **last name** in Name 2 field.
8	All other user detail and address information is optional. Complete according to organization preferences. CALENDAR USE
9	On the Roles tab, click on a role then R-mouse click to view the rights associated with that role.
10	Click **>** to assign the role to the user.
11	Click **Save** to store the information.

Organization Admin Tasks (continued)

Adding a User to a Group

Step	Your action
1	Click on the user name in the All Users group of the tree.
2	Click the group name. You will have the user in focus in the user box and the group in focus in the group box.
3	Click the **Add to Group** button and click **Yes** to add 'x' to 'y'.
4	Select the point of contact for each group and/or subgroup and click **Save**.
5	To view the groups with which a user is associated, right-click on the user name in the tree.

Editing a User Record

Step	Your action
1	Click on the user name in the User/Group tree.
2	Edit the User information.
3	Click **Save**.

Inactivating a User or Deleting a User from a Group or from the System
If inventory records or locations are associated with the user, you will not be able to delete the user from the system. It will be necessary to check the 'Inactive' box.

<u>Inactivating</u> a user means that items cannot be assigned to or transferred to the user and the user cannot be the point of contact for a location. Items that are assigned already to the user will remain associated with the user until they are transferred to someone else's custody.

Inactive users are not displayed in the *add* or *transfer to* procedures.

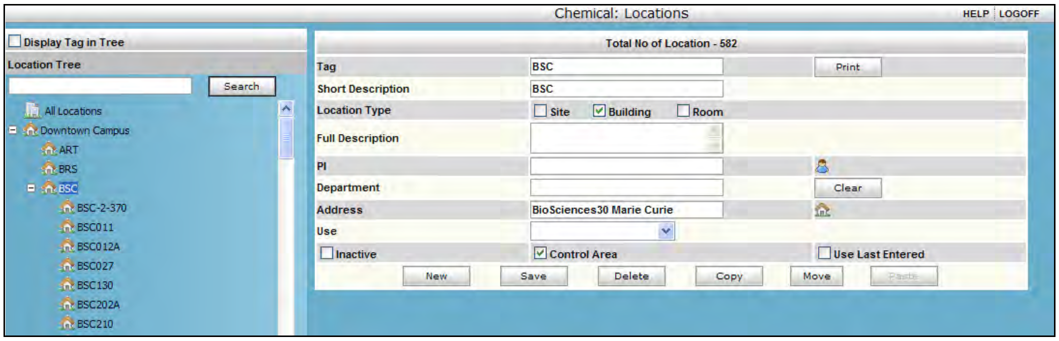
Deleting a User Record

Step	Your action
1	Click on the user name in the User/Group tree.
2	Click **Delete**. Respond to the prompt, 'Delete User from Group X' or 'Delete User from system'. NOTE: You will not be able to delete if the user is associated with inventory or location records; inactivate the user. Existing inventory records are not modified until you transfer items from the inactive user to another user
3	Click **Save**. The tree may not refresh until you leave the User Group tree

Locations

Use the Setup / Locations menu option to define the locations where your inventory will be received, stored, used, or taken for disposal processing.

Locations can be defined to many levels within your organization; however, we recommend keeping it simple, perhaps a second campus, building, room and one or two lower levels within the room. If your organization uses a master facility plan, you may consider using their nomenclature and numbering for buildings and rooms.



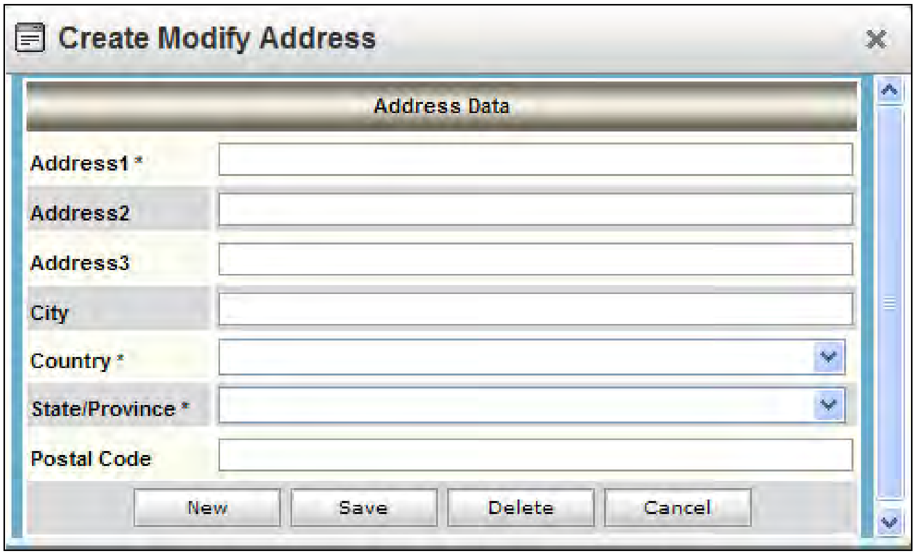
Example of the Location Tree with Multiple Buildings and Sub-locations

Enter the highest level location first; for example, enter a campus if you have multiple locations where you have one or more buildings. Then add buildings. If Control Areas are to be used, add the Control Area after buildings but before rooms. Use an identifier such as CA in the name and group the locations within the control area beneath it. In an upgrade, you will be able to define the exempt amounts for each named hazard class for each control area.

To add a parent location, complete the following steps*:*

Required fields: Location tag, short description

Step	Your action
1	To add a parent (or 'root') location, click **New** with no locations highlighted or in focus. If a location is already highlighted, click on the **Show Tags** prompt to take the focus off all locations.
2	If location tags are being auto generated, the tag number will display. Otherwise you must key in the value.
3	Enter a short description, up to 30 characters. We suggest you use upper/lower case. In the examples shown above, you will see that each room has a reference to its building. This will make it easier when you are viewing records in a search results grid or a report. For example, 3546 CCL is more helpful than 3546. There could be many labs numbered 3546 at your location. To provide a hook for reporting or barcode printing, define your location as an organization, building or a room by placing a check in the appropriate box.
4	All other data are optional. Complete according to organization preferences.
5	To add an address…. Click the location icon to the right of the address field to open the address form. Fields followed by an asterisk are required.

<table>
<tr><td></td><td>

Enter information for an address and click Save.
You may enter more than one address. Click New, then complete the required details. </td></tr>
<tr><td>6</td><td>In the location form, select the location address from the values in the address dropdown.</td></tr>
<tr><td>6</td><td>Click Save. The tree may not refresh until you leave the Location tree.</td></tr>
</table>

Organization Admin Tasks (continued)

To add a sub-location, complete the following steps:

Step	Your action
1	Click on the parent location in the tree.
2	Click **New**.
3	If location tags are being auto generated, the tag number will display. Otherwise you must key in the value.
4	Enter the name of the sub-location in the Short Description field
5	If appropriate, check the building or room box.
6	Click the **Save** button. The new sub-location appears under its main location.
7	Associate a User with a Location (optional): • If possible, identify the person and group responsible for the location. This will result in fewer keystrokes when new inventory records are created. When you select the location in a new inventory record, the user and group will display as well. You can overwrite the default user and group if necessary. **NOTE**: If multiple individuals share a room, it may be difficult to assign a single user to the location. • If you associate a user or group with the location, you will need to disassociate the user or group before you can inactivate the user or group.
8	Control Areas (optional) • If the location is a control area, place a check mark in the Control Area box. • In an upgrade, you will be able to define the exempt amounts for each named hazard class for each control area.

Deleting or Inactivating a Location

Step	Your action
1	If you enter an incorrect location, highlight the value and click **Delete.** You cannot delete a location that has inventory associated with it.
2	To prevent a location from being used in new inventory records, mark the location status 'Inactive'. This will not affect existing records but will prevent future use. Inactive locations will not display during the *add* or *transfer to* procedures. Inactivating a parent location will automatically inactivate all sublocations after the location tree is refreshed. Reactivating a parent location will not automatically reactivate all sublocations.

Organization Admin Tasks (continued)

Moving a Location

If you have added sub-locations such as storage cabinets or refrigerators, you can move the storage area and its contents. To move a location,

Step	Your action
1	Highlight the location to be moved; click **Move**.
2	Highlight the new parent location and click **Paste.**
3	Modify the description of the location, if necessary.

[Intentionally blank]

3. SHARED DATA

Intended Audience

This section explains use and maintenance requirements for tables that are shared among all organizations.

Shared Tables

The Catalog, Catalog Categories, Vendors, State/Country, and related system code, physical, regulatory, safety and MSDS tables are shared among all organizations. The purpose of sharing the Catalog, Vendors, and Category tables is to eliminate repetitive and error prone data entry.

All users who are authorized to modify these tables should use extra caution to ensure data integrity. The Category, Vendors and State/Country tables are located under the Setup menu but are documented here because of their relationship to the catalog.

Catalog

About the Catalog

The Catalog is the master listing of chemical, biological, equipment and supply products stored in the database. Each catalog record is associated with the module from which it is added and you will see only catalog records associated with the module you are using. The catalog records are used to create inventory records. The startup Enterprise chemical catalog includes over 200,000 size-specific product listings from Aldrich, Sigma, Fluka, Supelco, Riedel deHaën, JT Baker, Mallinckrodt, Lancaster, and Fisher. It also includes Alfa Aesar, EM Science (now EMD), and Acros products listed by product number only. As you use products from these vendors, you must update the catalog record with the correct unit and unit of measure values.You will add new catalog records for inventory items that are not included in the startup catalog.

Each catalog record may be vendor, product number, and size-specific and may be associated with an optional inventory category such as 'organic'. The catalog speeds data entry and ensures consistency across your system. By re-using catalog records, you will not need to type the names, Chemical Abstracts Service (CAS) numbers, vendor name, vendor product numbers, unit or unit of measure for most of these.

Sharing the catalog among organizations allows you to leverage the efforts of one group to the benefit of all system users. In the Chemical and Biological Modules, all organizations must agree to use a few common values that will enable Environmental Health and Safety staff to meet regulatory requirements.

At a minimum, each chemical catalog record should include substance name (description), unit (item size), unit of measure, CAS if one is available, physical form (state) and density. Including the vendor and product number will make the catalog records easier to use and more useful to researchers. Each organization should assign one individual to verify additions to the catalog. This will provide accountability and quality assurance for all system users.

The fields of information are specific to the module. For example, the chemical module includes the CAS number and links to the physical data for an item; the biological module links to the source, characterization, and references associated with the item.

You can modify or copy the catalog records, delete unused records, and add new vendors and their products.

You can add your own organization as a 'vendor' and prepare records for substances that are formulated on organization. Because the catalog is shared among all organizations, organization administrators should agree upon a strategy for including such organization-generated items.

Catalog (continued)

The delivered biological catalog may contain many of the ATCC® (American Type Culture Collection) biological products.

A limited number of Aldrich products are provided for the Supply module. You will find that most Aldrich product numbers that commence with ‘Z’ are included.

Catalog Values

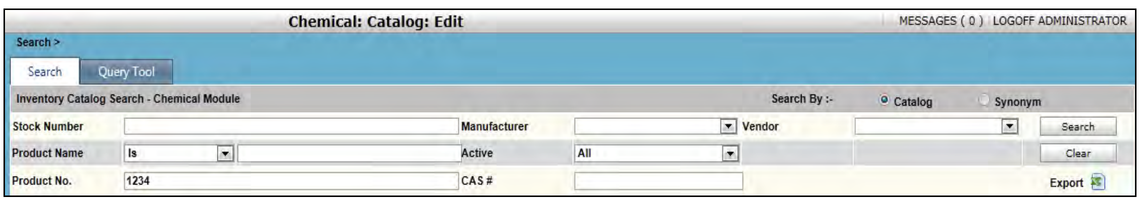
The following table lists the fields associated with a chemical catalog record. Field names shown in the table may have been customized for your system.

The values you define as ‘Required’ in the Settings / Customized Screens are required for your system in the catalog. They will be marked with an asterisk.

Before you add a new catalog record, confirm that the item—or a similar item—does not exist in the database. Remember, you can copy a record and change it as necessary. For example, you can select an acetone record, copy it, and modify the vendor, product number, and size information. This will preserver all physical, safety, and regulatory data already associated with acetone and save you time as you add new substances.

Search and Query the Catalog

To review catalog entries, select the Catalog / Edit option from the Chemical menu.



Edit Chemical Catalog – Search and Query

Use the Inventory Catalog Search Tab at the top of the page to locate a specific record based on one or more of the displayed values. Use the Query Tool when you need to build a more complex set of criteria.

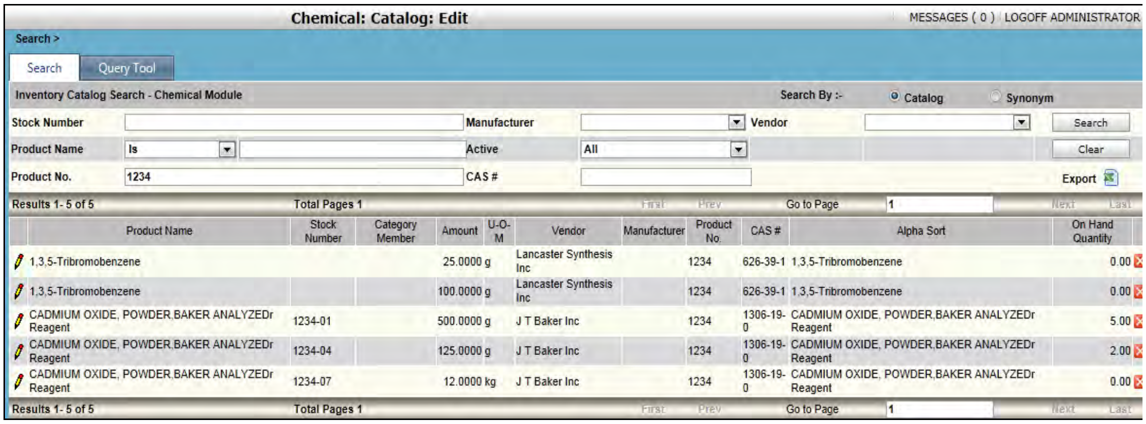
Enter values in the stock, chem name (description), product, manufacturer, supplier, or CAS field(s), and then click **Search**. If you use the Chem Name field, select ‘Is’ to look for exact matches, or choose ‘Contains’, ‘Ends with’, or ‘Starts with’ to expand the search criteria.

The Active field will default to ‘All.’ ‘Active = All’ means display all records in the catalog that share the value you are specifying. [‘Active=Yes’ means that the item is now active in your inventory. ‘Active=No’ means that the item is not now in your inventory.]

Enter a valid CAS number with or without the formatting dashes; CAS numbers are stored in the database with the standard format xxxxxxx-xx-x (e.g., 50-00-0). ‘Valid’ means as defined by the ACS algorithm. (http://www.cas.org/expertise/cascontent/registry/checkdig.html).

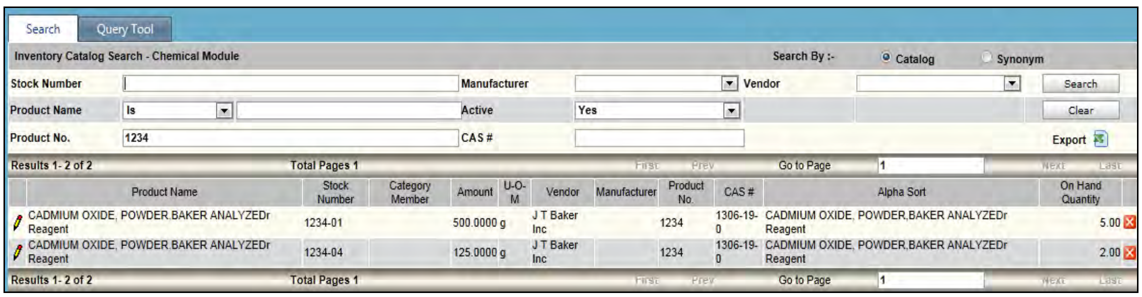
All records that match the criteria will display in the Results grid. The number of selected records (87 on 9 pages of 10 each in the following example) displays at the top of the results grid. You can specify the page you wish to display, or move to the Next page or to the Last page. Click on the pencil icon to display the details for a single record.

Catalog (continued)



Search Catalog for <u>All</u> Records with Product No. 1234

The more specific your search criteria, the more specific your results will be. For example, if we change the Active criterion to be 'Active = Yes', the results grid might look like this.



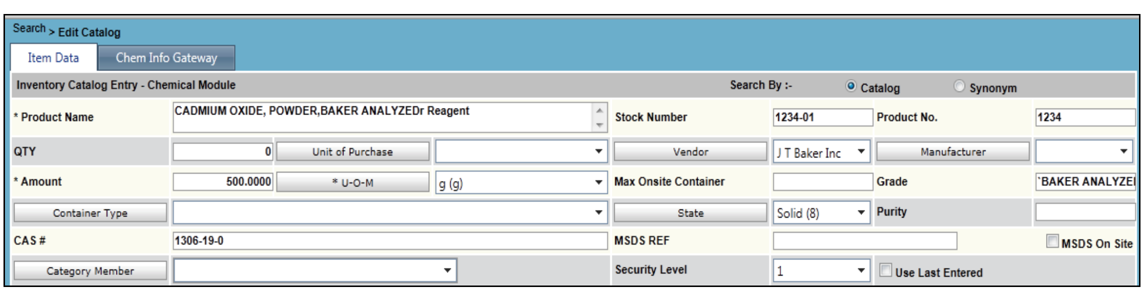
Search Catalog for <u>Active</u> Records with Product No. 1234

To change the results sort order, click on the column header. For example, to see the results in product number order, click on the column header labeled 'Product No.' (Remember, your organization can change the name of the field, 'Product No.' as well as other field names.)

NOTE: The column identified as 'On Hand Quantity' reflects the sum of the quantity values associated with each container record for this item that is on site. Usually the quantity is one and the quantity on hand is equal to the number of inventory records for the catalog item However, if you have recorded a quantity greater than one for a single inventory item, the quantity on hand will reflect the increased number.

View or Edit Catalog Records

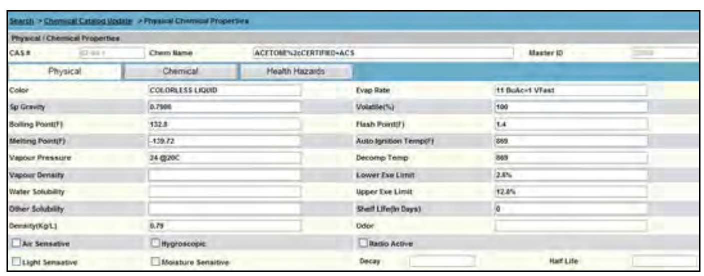
To select a single record for editing or viewing, click on the pencil icon in the left column of the results grid. The values listed in Table 1 will display. o return to the results grid from a single catalog record, click on the **Search >** link at the top left of the screen.



Return to Search Results from Catalog Edit Details

Catalog (continued)

Table 1. Chemical Module Catalog Field Descriptions

Field	**Description**
Chem Name (Description)	The name of the item, usually as listed in the vendor catalog or as shown on the container label
Supplier/Vendor	The name of the company that provides the item (usually the name on the label); selected from a drop down list of vendors
Product number	The catalog or product number as shown on the container or in your vendor's catalog, for example J.T.Baker product '9244'
Stock number	The product number *plus* the vendor's size specific designation, for example, J.T.Baker product 9244-06 OR your own internal stock/supply number as used in your stores operation
Unit	The amount in the container you receive from your supplier
Unit of Measure	The size designation; selected from a drop down list of units of measure
Container	The type of vessel the substance is stored in, e.g., plastic
State	The physical form of the substance
Purity	Complete this field if you want to create an additional master record for the CAS to manage toxicity and regulatory data
CAS	The Chemical Abstracts Service number, if available, for pure substances.
Security Level	The value from 1 through 10 that designates the level of the user security level required to view the catalog record or any associated inventory records.
Density	The physical density of the item. Required to convert volume to mass. Used to calculate the amount in kilograms for use in reporting. Density must be stored in the Physical Data form; use the Chemical Information Gateway, Physical/Chemical Data.  *Physical/Chemical Data*
Category Member	The grouping to which the item is linked; selected from a drop down.
MSDS On Organization	The checkbox that indicates that an MSDS for this vendor's product is on organization
MSDS REF	The internal identifying document number for organizations using hard copy MSDS.
Notes	User definable information that will display with every individual inventory record associated with this catalog item.
Quantity and Unit of Purchase	It is NOT necessary to populate these values unless your organization uses them for a organization-specific purpose. They will be used with the Supply Module.

Note: Bold values represent recommended 'required' values.

Table 1. Biological Module Catalog Field Descriptions

Field	Description
Name (Description)	The name of the item, usually as listed in the vendor catalog or as shown on the container label
Supplier/Vendor	The name of the company that provides the item (usually the name on the label); selected from a drop down list of vendors
Product number	The catalog or product number as shown on the container or in your vendor's catalog, for example J.T.Baker product '9244'
Stock number	The product number *plus* the vendor's size specific designation, for example, J.T.Baker product 9244-06 OR your own internal stock/supply number as used in your stores operation
Unit	The amount in the container you receive from your supplier
Unit of Measure	The size designation; selected from a drop down list of units of measure
Container	The type of vessel the substance is stored in, e.g., plastic
State	The physical form of the substance
Purity	Complete this field if you want to create an additional master record for the CAS to manage toxicity and regulatory data
CAS	The Chemical Abstracts Service number, if available, for pure substances.
Security Level	The value from 1 through 10 that designates the level of the user security level required to view the catalog record or any associated inventory records.
Category Member	The grouping to which the item is linked; selected from a drop down.
MSDS On Organization	The checkbox that indicates that an MSDS for this vendor's product is on organization
MSDS REF	The internal identifying document number for organizations using hard copy MSDS.
Notes	User definable information that will display with every individual inventory record associated with this catalog item.
Quantity and Unit of Purchase	It is NOT necessary to populate these values unless your organization uses them for a organization-specific purpose. They will be used with the Supply Module.

Note: Bold values represent recommended 'required' values.

Catalog (continued)

Adding a Catalog Item

To add a record to the Catalog, select Catalog/New from the Chemical Module menu. (You can also add a new catalog record as you are adding a new container record in the Add form where you can use the 'Add New' option to update or create a new catalog record.)

To **add** a new catalog item, complete the following steps in accordance with your policies and procedures for required values.

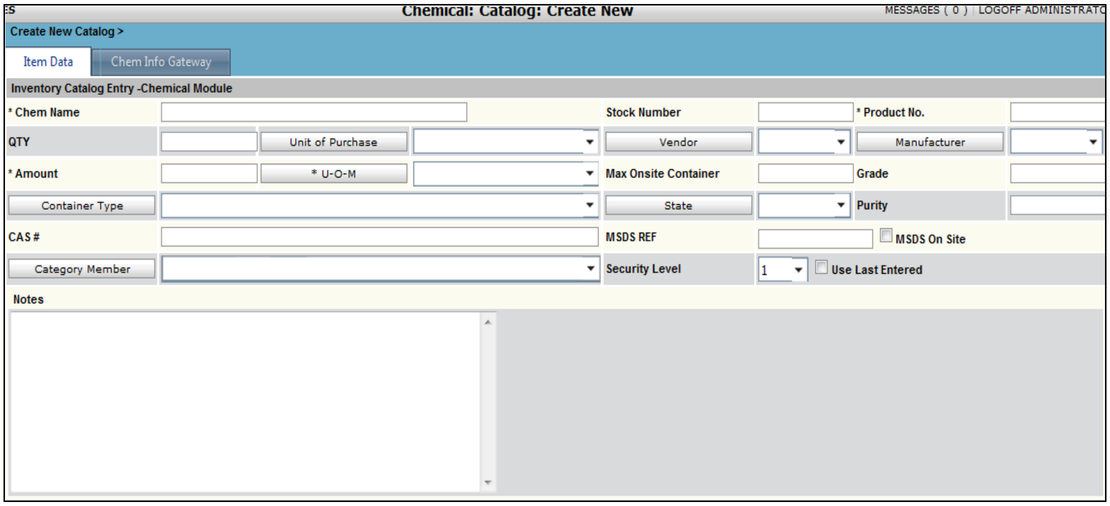
Step	Your Action
1	Select Catalog, Create New.
2	Click **New**.
3	Enter the name of the item you are adding to the catalog.
4	Enter the Stock Number. If the vendor provided a size-specific catalog number such as JT Baker's 4081-01 for the 500g size of Acrylamide, use that value. If the vendor uses only a product-specific catalog number such as Sigma-Aldrich's 270660 for Carbon Disulfide, enter the catalog number plus the size—270660-1L. You may use your own internal stock numbers. However, all products listed in the IM startup catalog follow the logic described above
5	Enter the Product (catalog) Number shown on the vendor's label.
6	The quantity field defaults to null (blank).
7	In the chemical, biological, and equipment modules, you can skip the purchase Quantity and Unit of Purchase. (Those fields are used in the Supply module.)

Catalog (continued)

Adding a Catalog Record, continued

Step	Your Action
8	Select the Vendor and/or Manufacturer from the drop-down menu. Know which one you will use for searching and reporting purposes. All records delivered with IM use the Vendor (supplier) field to identify the company whose name is on the label.
9	Enter the item size (Amount) (how much is in the container) and the Unit of Measure. These values are critical to accurate inventory records.
10	The Max Onorganization Container field has limited applicability in the Enterprise version.
11	Enter the Grade as shown on the vendor's label.
12	Select the Container type from the drop down menu.
13	a. For chemicals, select the physical State of the substance from the dropdown; this value is important for calculating the amount remaining in kilograms if the state is gas or liquid. It is also important if the item has a single CAS that can be delivered in two forms; you need two different master records for safety and regulatory information. For example, if the item can be a solid or a powder, or a gas or liquid, defining the state (and purity) will trigger IM to add a master record for defining the hazards associated with the differing states. b. The physical state of a biological is not used in calculations but may be helpful for your researchers. Examples include live, sperm, or embryo.
14	Enter purity as appropriate. It is usually included in the chemical name as delivered by the vendor. Purity is important if the pure substance is toxic, but the diluted substance is less toxic or not toxic at all.
15	a. Enter the Chemical Abstracts Service (CAS) number for a chemical; you cannot enter a number that is not a valid CAS, or b. enter the Designation for a biological substance.
16	Enter the MSDS Reference number in the MSDS Ref. field.
17	Check the MSDS On Organization checkbox if the Material Safety Data Sheet is on organization.
18	Select the Category Member associated with this item, if any.
19	Use the Security Level field to change the security level in accordance with your organization policies and procedures. All items default to security level of 1, the lowest level.
20	Use the Notes box to record information about the item. The notes will be displayed with each inventory record that uses the catalog entry. The tab label will change to read 'View Notes' if information has been stored with the catalog item.
21	Click **Save**. If all required values have been populated, a 'Data Saved' message will display.

Catalog (continued)



Data Entry Form for New Chemical Catalog Record

Add: Use Last Entered (Copying and modifying an existing record)

If you have multiple sizes of the same product, or if you are adding the same product from multiple vendors, the 'Use Last Entered' option will speed data entry. You have two ways to use this feature:

(1) To add new records using a displayed catalog record as a template, complete the following steps.

Step	Your Action
1	Click **New.**
2	Complete information on the first item.
3	Click **Save**; keep the item in focus, that is, don't go to some other catalog item.
4	Click **Use Last Entered.**
5	The system will save all the information as a template and allow you to change any value such as vendor, product number, or unit and unit of measure.
6	Click **New.**
7	Update the displayed record.
8	Click **Save.**

Catalog (continued)

(2) To Search or Query to select an existing catalog record then copy it to make another record complete the following steps.

Step	Your Action
1	Select a record from the existing catalog items and click **Use Last Entered**
2	Click **New**.
3	The system will save all the information as a template and allow you to change any value such as vendor, product number, or unit and unit of measure.
4	Click **Save.**

Editing a Catalog Record – Use with caution

If you edit an existing catalog record, remember that the changes will affect all inventory records that use the catalog record. The system will display cautionary messages if you change the CAS, change the unit and / or the unit of measure, or change or add the physical state. Each of these changes may be appropriate, but change with care.

Finishing Details for a Catalog Record

1. Use the Chemical Information Gateway/Physical Data to define the density for liquids and gases if density has not already been defined.
2. Use the Chemical Information Gateway to define the substance as a mixture and to list its constituents.
3. Use the Chemical or Biological Information Gateway/MSDS Link to link an MSDS to the new catalog record, if a link does not already exist.

Mixtures

To define the constituents of a mixture, you must know the CAS number of each constituent and the percentage or min and max. At least one record for each constituent CAS number must exist in the catalog.

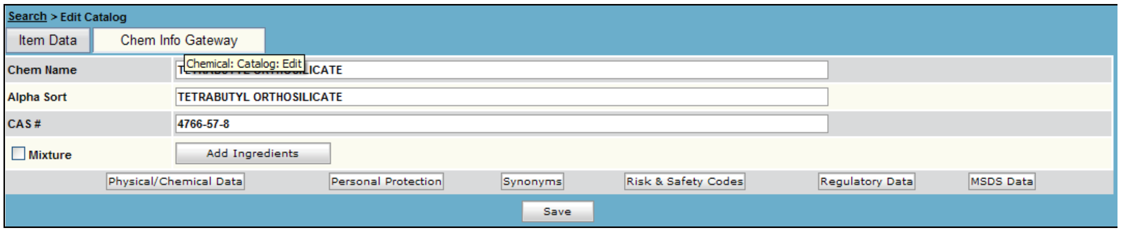
Before you begin, review the catalog record for the mixture; it should **not** carry the CAS number of a pure substance. If you use the CAS, the catalog record will be linked to the Master data for the substance. You may need to delete the CAS in an existing record: remember, the substance is a mixture, not a pure chemical. It may not carry the physical, regulatory, or safety information associated with the pure substance.

Review the catalog record to verify that the mixture has a defined product number and supplier. These two values will trigger a Master ID which will be linked with the mixture record. When the new Master ID is generated, you may elect to keep the data from the previous record if appropriate.

To define a substance as a mixture:

Step	Your Action
1	Confirm that the catalog item does not have the CAS of a pure substance. If it does have a CAS, review all inventory records for the item before proceeding to ensure that your changes are appropriate.
2	Select the catalog record, then select the Chemical Information Gateway tab.
3	Place a check mark in the **Mixture** box.
4	Click **Save.** This defines the catalog record as a mixture and enables the Add Ingredients button.

Catalog (continued)

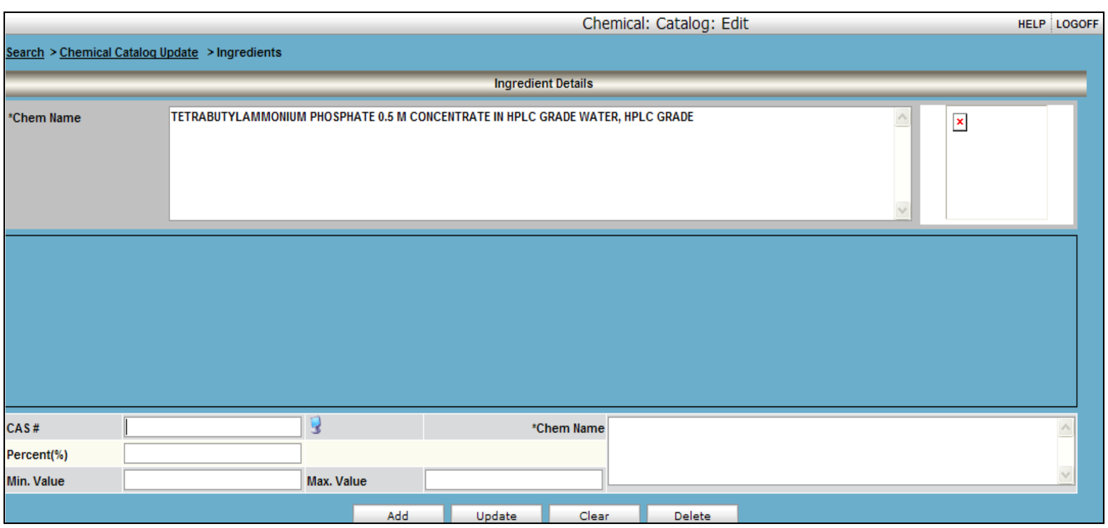


The Chemical Information Gateway Options

To define the ingredients in a mixture, complete the following steps.

Required fields: CAS No., Ingredient Percentage or Min and Max

Step	Your Action
1	Click **Add Ingredients.**
2	Click in the CAS # field and enter the CAS number of the ingredient and press **[Tab].** At least one record with the CAS must exist in the catalog and at least one synonym must be defined for that product.
3	A list of synonyms will display if the CAS exists in the catalog table. Select a name from the list. (Synonyms are linked to Master records). The synonym should be a simple name such as 'toluene' rather than a specific product name such as 'Toluene, Baker Analyzed.' If no synonym displays, you must add one.
4	Click **Return.**
5	Click in the CAS # field and enter the CAS number of the ingredient and press **[Tab].** At least one record with the CAS must exist in the catalog and at least one synonym must be defined for that product.
6	Enter the average percentage. You may also enter the Min and Max.
7	Click **Add**. The first ingredient displays as a numbered item in grid.
8	Repeat steps 5-9. When all ingredients have been entered, click **Save.**
9	Click **Return** to return to the Catalog. The next time you return to this catalog record the Mixture box on the Chemical Information Gateway will be checked and the button next to it will say **View/Edit Ingredients.**



Beginning Ingredients Form – No Constituents Defined

Catalog (continued)

To update or edit ingredients:

Step	Your Action
1	Click **View/Edit Ingredients.**
2	Click on the line displaying the ingredient to be updated.
3	Change the value as necessary.
4	Click **Update**.
5	Click **OK.**
6	Click **Return**. The screen returns to the Catalog screen.

To delete an ingredient:

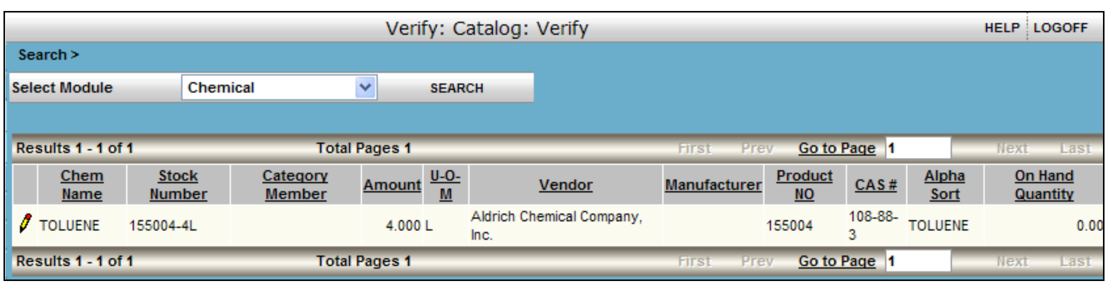
Step	Your Action
1	Click **View/Edit Ingredients.**
2	Click on the line displaying the ingredient to be updated.
3	Click **Delete**. The item will be removed from the ingredient list.
5	Click **OK.**
6	Click **Return**. The screen returns to the Catalog screen.

Home Menu - Verify Catalog

Because catalog records are shared among organizations, the Inventory Manager offers a tool for a selected group of users to verify additions to the catalog. The system and organization administrators define the group and establish the review guidelines.

To verify new catalog records, complete the following steps:

Step	Your action
1	Select the **Verify Catalog** menu option.
2	From the dropdown, select the module of interest and click **Search**.
3	When the results display in the grid, click the edit pencil to review the details of the catalog record.
4	Make any necessary changes and click ‘Verify & Save’.



Verify Catalog Search Results Grid

Setup Menu - Categories

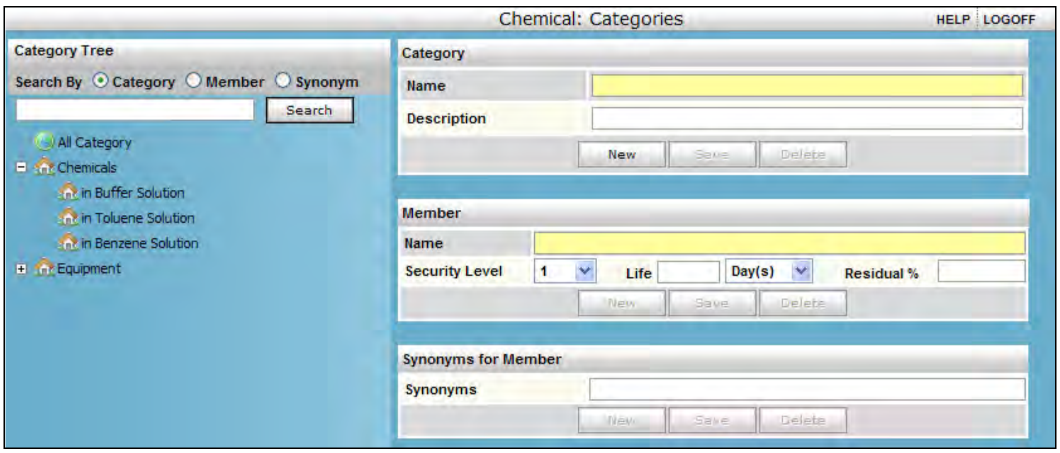
Categories

Categories and their category members are optional classifications of catalog items that may assist your report preparations. The category is a high-level grouping that is not available in the physical, regulatory or safety tables, for example, 'chemicals' or 'equipment.'

Build inventory classifications (categories and category members) to distinguish the types of inventory items you will monitor, for example, instrumentation or computer equipment. Chemical members might include maintenance chemicals, research chemicals, pesticides, dyes and fragrances, etc.

- If individual classes of items require additional security, update the Member default Security Level of 1 to a value between 2 and 10.
- Only individuals with a matching or higher security level will be able to see catalog and inventory records with the higher settings.

Only Category Members are linked to catalog records; therefore, there is no purpose in defining Categories unless you will define category members.



Category Tree Example

To Add a Category complete the following steps:

Required Fields: Category Name

Step	Your action
1	Click the **New** button, next to the Category section.
2	Enter the Category name in the Name field.
3	Enter a description in the Description field if desired.
4	Click **Save** next to the Category box.

Setup Menu – Catalog / Category Members

Category Members

To Add a Category Member, complete the following steps:

Required Fields: Member Name, Security Level

Step	Your action
1	Click the **New** button in the Member section of the screen, next to the Member section.
2	Enter the category member name in the Name field.
3	Set the Security Level; all catalog records you assign to the category member will default to this security level (which you can override as you edit the catalog record).
4	Enter the shelf life of the item in days, for example 90 for peroxide formers. You will choose to apply this value only to new inventory items of this category member, or to all existing records for this category member.
5	Press **[Tab]** to get to the Term field
6	Click **Save** near the Member box.

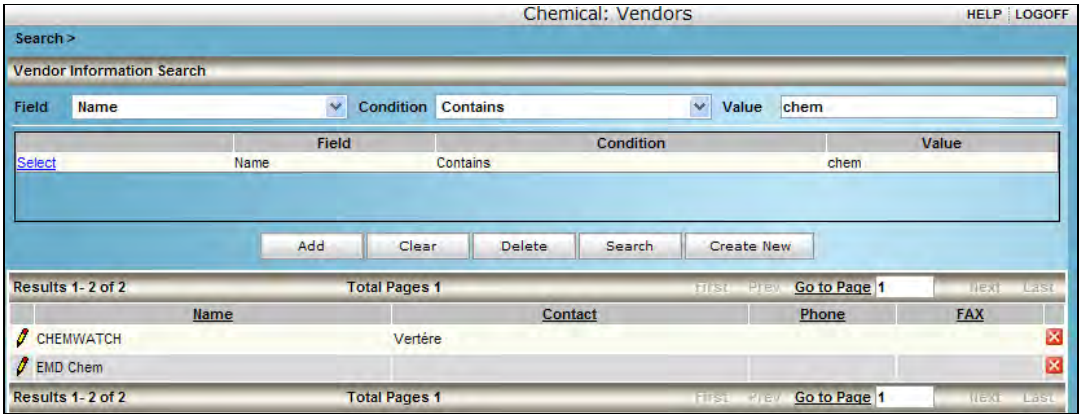
To add a synonym for a category member:

Step	Your action
1	1. Highlight the category member and click the bottommost **New** button**.**
2	Enter a synonym in the Synonym field.
3	Click **Save**.

Setup Menu - Vendors

Vendors

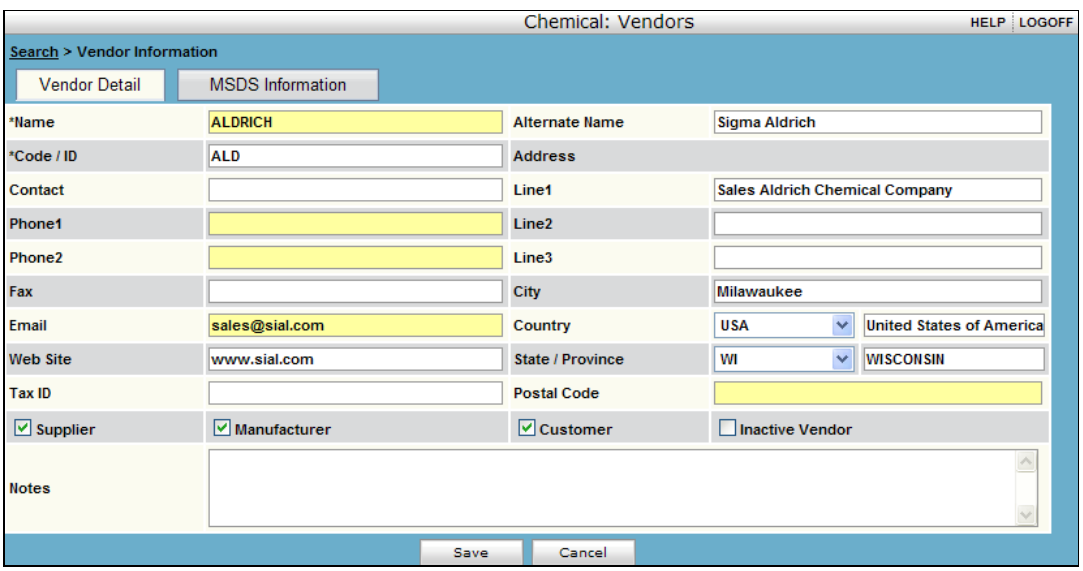
The vendors table stores information about the companies that manufacture or deliver items you use. Review the delivered list of vendors and add any from which you normally purchase chemicals. This table is shared among all organizations, so you should agree upon naming conventions as you begin to use the system.



Vendor Search Options

Use the search options to locate one or more vendors for viewing or updating. You can edit the vendor names or codes provided with the Inventory Manager but you cannot delete them; they are associated with catalog records. You can add a record for your organization if you will track items you prepare on organization.

NOTE: The name you use in your vendor table should match the name that will appear on chemical containers. Having consistent names will make it much easier to locate containers on your shelves.



Sample Vendor Record

To check the list of current vendors on your system, add a search criterion and / or click the **Search** button. The Search Results grid will display in the results grid. Click on any column header to change the display order.

Setup Menu – Vendors (continued)

To add a vendor, complete the following steps:
Required fields: Name, Code or ID

Step	Your action
1	Click **Create New** to enter a new Vendor record.
2	Complete the two required fields—Name and Code—and any other information you want to maintain. The code may be the vendor code used by your purchasing department, or a shortened version of the vendor name, or the HIBCC code such as H479 used for J.T.Baker.
3	Mark as Supplier or Manufacturer as appropriate.
4	Click **Save.**

If you no longer will purchase from a vendor, you can inactivate the vendor. This procedure will not alter the existing catalog records; it will prevent anyone from associating the vendor with a new catalog record.

To inactivate a vendor, complete the following steps:
Required fields: Name, Code or ID

Step	Your action
1	Search and locate the vendor record.
2	Place a checkmark in the Inactive Vendor box.
3	Click **Save.**

To delete a vendor, complete the following steps:
Required fields: Name, Code or ID

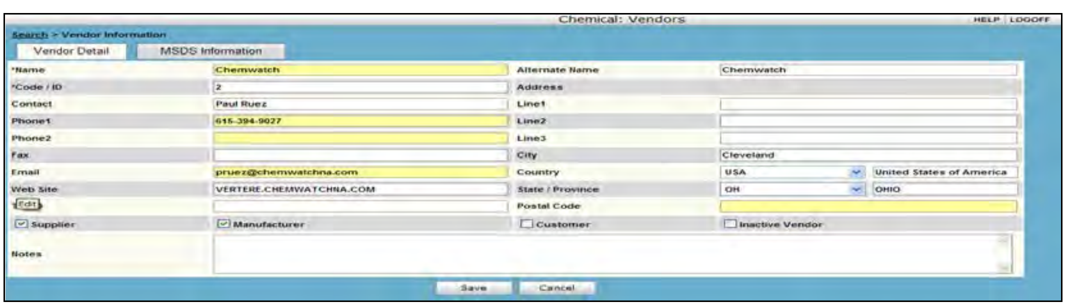
Step	Your action
1	Search and locate the vendor record.
2	Click **Delete**. If the vendor is used in any catalog record, you will not be able to delete the record. Consider inactivating the vendor.
3	Click **Save.**

Vendor's MSDS Path

The vendor table stores information to allow users to view Material Safety Data Sheets on the vendor's web organization or in the system by using the Chemical Information Gateway\MSDS Link\MSDS Resources from an Inventory record or the Catalog.

To define an internet web organization where MSDS information is stored for the vendor:

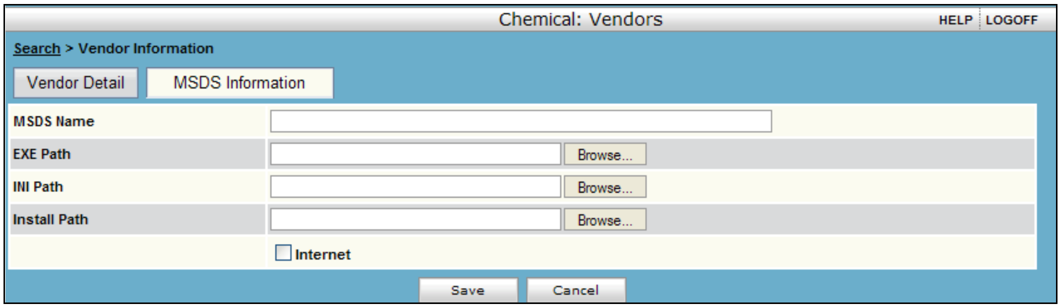
Step	Your action
1	Enter the web link, for example vertere.chemwatchna.com in the Web Organization field as shown below.
2	On the MSDS Information tab, enter the MSDS Name as you want it to appear in the MSDS Links within VIM.
3	Check the Internet box on the MSDS Information tab.
4	Click **Save.**



Vendor Detail Screen

Setup Menu – Vendors (continued)

To define a local server where MSDS information is stored for the vendor complete the steps below using the MSDS Information tab.

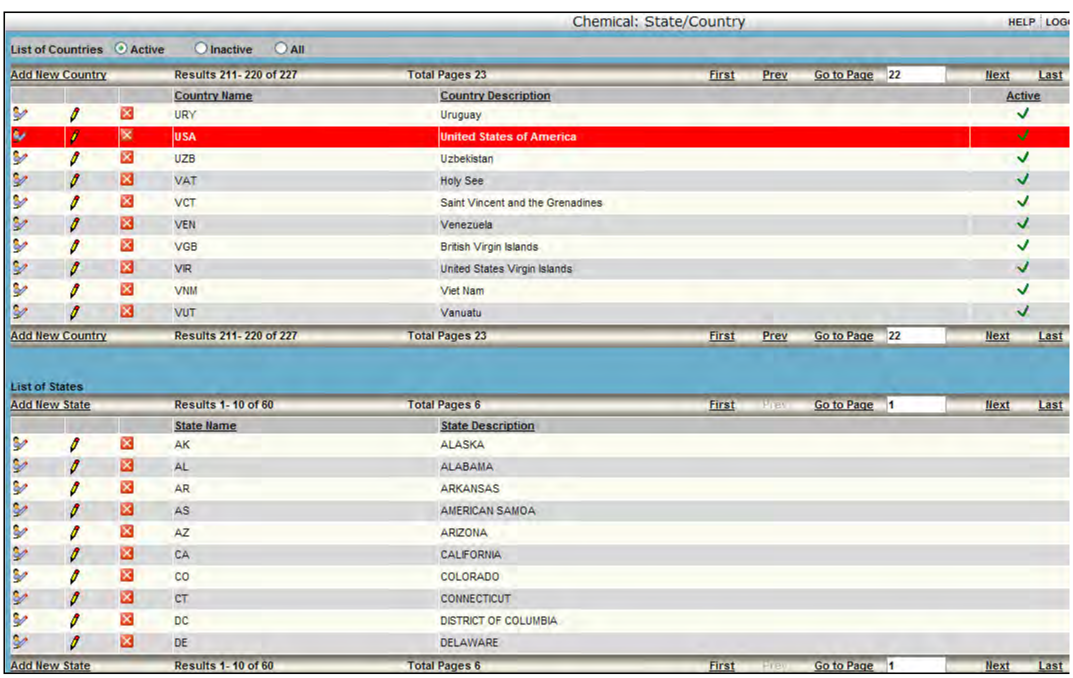


MSDS Path Fields

Step	Your action
1	Click the MSDS Information tab.
2	In the MSDS Name field, enter the name as you want it to appear in the MSDS links for this vendor.
3	In the executable path field, enter the path name, for example C:\Program Files\Chem.
4	In the INI Path field, enter the INI designation.
5	In the Install Path field, enter the executable name (for example, CW32.EXE) or browse to select the path.
6	Click **Save.**

Setup Menu - State / Country

Use the State and Country menu option to maintain the countries and states/provinces with which you do business. The delivered system includes many countries that you may not need. You may inactivate them to reduce the values that display to your end users. You may not delete any delivered value. However, you may delete any countries, states, territories or provinces you add.



Country and Related State Edit Forms

Setup Menu - State / Country (continued)

States, territories and provinces are defined at delivery for the United States and for Canada. To add states, territories or provinces for other countries, complete the following steps.

Step	Your action
1	Highlight the country (for example, Mexico) by clicking on the select icon in the left column.
2	Click **Add New State**.
3	In the State Name column, enter the state abbreviation, for example, QR.
3	In the Description field, enter the state name, for example Quintana Roo.
4	Click **Save**.

4. INVENTORY MAINTENANCE

Intended Audience

This section explains use and maintenance requirements for site-specific tables used in day-to-day management of your scientific materials inventory.

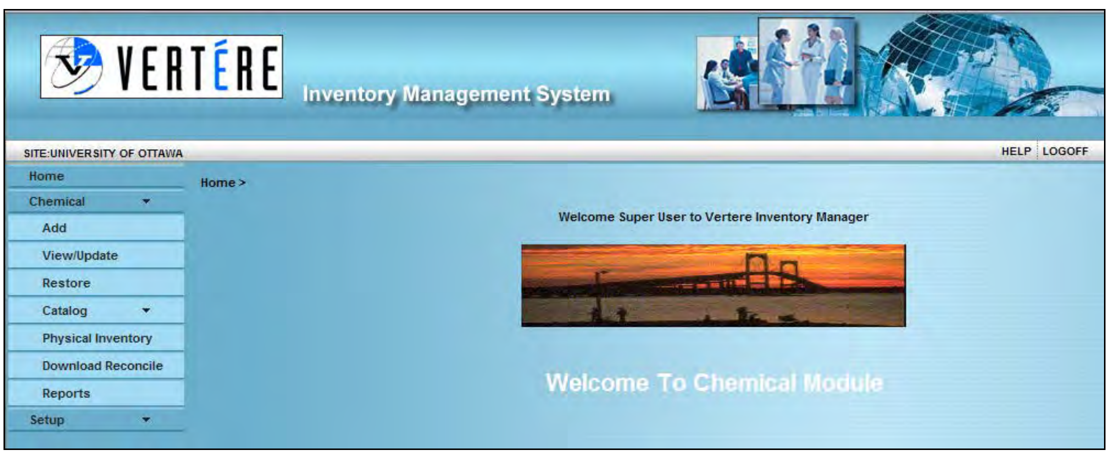
The functions and procedures described in this section apply to the general, chemical, and biological modules. Each module, however, will have fields specific to the items being included in the inventory, and will have some functions that are module specific. This section focuses on the chemical module.

Module Menus

Module menus for chemicals, equipment, biological, and supplies provide the means to maintain the shared catalog and to add, update, dispose, and restore your site-specific inventory items.

You will use the Download/Reconcile menu to update your inventory records if you collect data with mobile computers utilizing barcode readers. You will use the Physical Inventory menu to compare expected-to-actual results when you audit inventory records.

The menu choices reflect the current module. In the following example, the user is logged into the Site = University of Ottawa and the Module = Chemical. Menu options in the Biological module are similar.



Site and Module Menu

The Fixed Asset module includes options for ageing and depreciating your equipment records. The General module excludes ageing and depreciation.

Review Section 2 for Instructions on using the Setup menu.

Shared Tables

The Catalog, Categories, Vendors, and State/Country tables are shared among all sites. All users who are authorized to modify these tables should use extra caution to ensure data integrity.

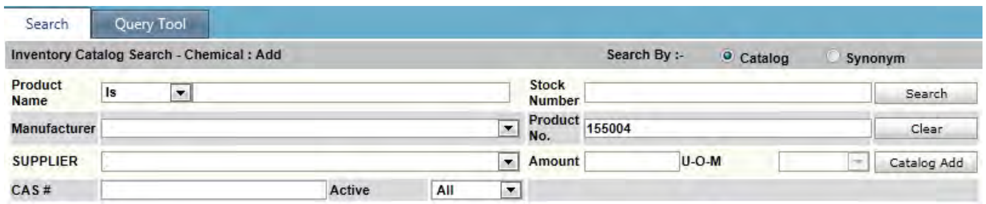
If you are using a shared database, your Site Administrators will coordinate maintenance of the shared tables.

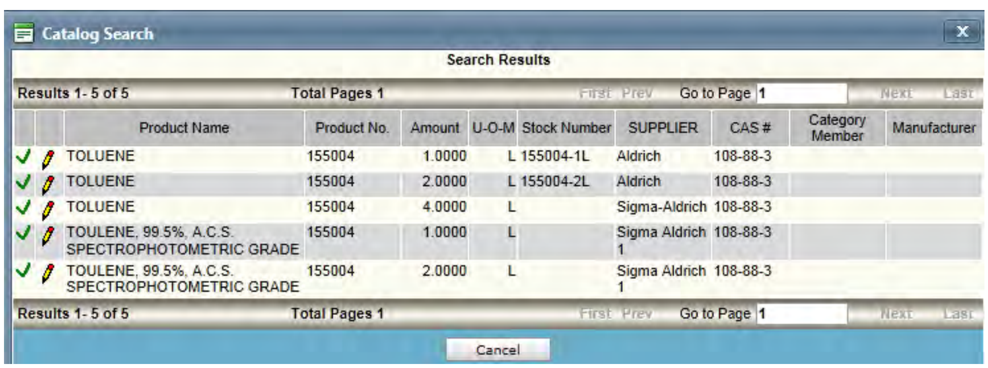
For detailed directions on use of the shared tables, see Section 3 of this Guide.

Add Inventory

Site-Specific Tables - Inventory

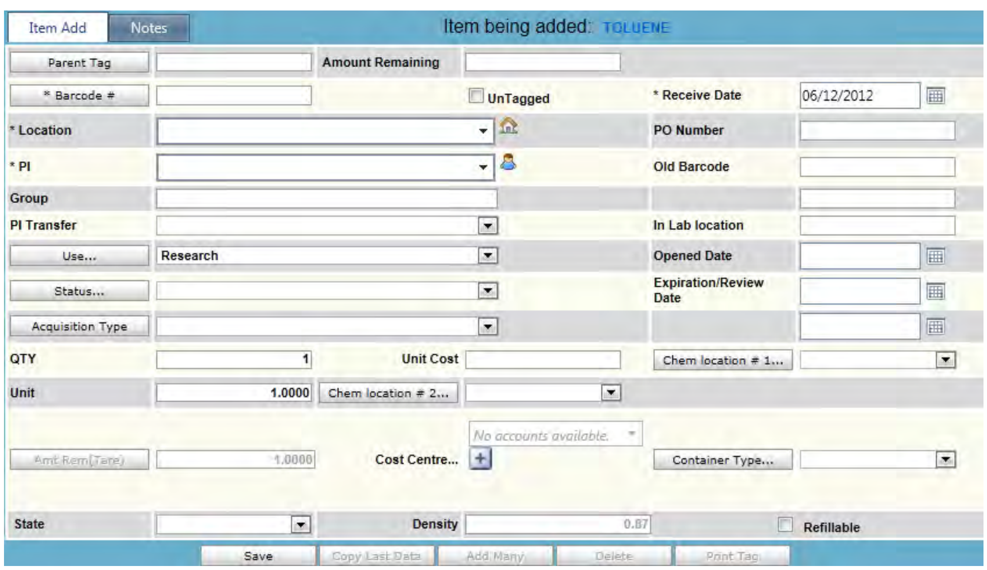
Use the **Add** option to enter new inventory item records. This function is used only to add; use the View/Update option to modify or delete inventory items. To add a new item, complete the following steps:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select the Add menu option.</td></tr>
<tr><td>2</td><td>Search for the correct product using the Inventory Catalog Search – Chemical: Add or the Query Tool.
a. Enter either a product, stock or CAS number for the most direct results.
▪ A product number will generally return the best results although it may return several records representing one or more sizes from one or more suppliers.


Chemical Add with Search for a Specific Product Number
▪ A stock number will normally return only one record unless by chance two vendors use the same catalog and size designator.
▪ A CAS number will return all the records that share that value.
▪ The Chem Name may return multiple items.


Search Results from Catalog with Active=All
b. If the correct product does not display and you cannot locate it using either the Search or Query Tool, go to step 4 below.
c. If the product is displayed, complete the following steps:</td></tr>
</table>

Add Inventory (continued)

Step	Action
	i. Choose the correct vendor and size from the results grid by clicking the checkmark. You can click the edit ( ) icon to modify the catalog record if desired before proceeding to step ii. below. ii. The item Add screen will display. iii. Enter all data elements required (marked with an asterisk) for your site records. Use your mouse or tab through the fields to complete data entry. At a minimum, ▪ If tag numbers are auto generated, the number will display when you click on **Barcode** #. ▪ To search the Location tree, click *in* the location field; to add a new location, click the **Location** icon. If the icon is not displayed, you do not have the necessary rights to modify the location tree. ▪ To search the **User Group** tree, click *in* the user field; to add a new user or group, click the **User** icon. If the icon is not displayed, you do not have the necessary rights to modify the user/group tree. ▪ The Quantity field (number of containers associated with this tag) will default to 1. ▪ The Unit and Amount Remaining values will be displayed as stored in the catalog record. You can modify the amount remaining by updating the field labeled 'unit'. ▪ Modify the Receive Date field if the default current date is incorrect. ▪ If shelf life is defined (in days) for the catalog record, the Expiration Date will be populated with the Receive Date plus the number of days. iv. Click **Save**; the **Copy Last Data, Add Many, Delete** and **Print Tag** buttons will enable.  *Chemical Module Add Form*
3	**Print Tag** to print the barcode; apply it to the item.

Add Inventory (continued)

Step	Your Action
4	If your exact product does not display when you search or query the catalog, you can select a similar record from the grid and click on the edit icon ( ) or click the Catalog Add button at the top right of the query form to add an entirely new record. The catalog maintenance form will display. Depending on your starting choice, you can ▪ Update an existing catalog record (for example, update with the correct unit and unit of measure) and click **Save** and click **Return** to return to the Add Inventory form. ▪ Copy the displayed catalog record to add a new record to the table: place a check mark in the Use Last Entered box, click **New** and modify the displayed information. Click **Save** and click **Return** to return to the Add Inventory form. ▪ Add a new catalog record: click **New** and enter the information about your item. Click **Save** and click **Return** to return to the Add Inventory form.

Add Many
If multiple items with exactly the same data are being added, click **Add Many** and enter the number of additional items when prompted.

If you are using pre-printed tags, click **Show** and enter the tag values into the Item Tag column and click in the Item Tag field of the next row or use your Tab key to navigate to the next row until all barcode numbers have been entered.

- Click **OK**; apply tags to items

If you are auto-generating barcode numbers,

- Click **Print Tags** for New Items
- Click **OK**; apply tags to items

Click **Chemical Add** in the history line to return without adding additional records.

Copy Last Data
If multiple like items with different locations or user details are being added, click **Copy Last Data**. Update the fields that are being modified including the barcode number, and click **Save**. Print and apply the tags.

Carry-Over
To retain key values in the inventory record and select a different chemical from the catalog, click **Clear** in the Search area at the top of the screen. Type in new search criteria and click Search in the area at the top of the screen. The system will display the catalog results window. Select the chemical of your choice.

If no record matches your new search criteria, click Catalog Add. In the Catalog Add screen, complete the site-required values for a new catalog record and click **Save**. When the record has been saved, click **Return** at the bottom left corner of the catalog window.

> IMPORTANT: Only the Location, User and Group, and PO number are carried over in the current version.

Add Inventory (continued)

Delete

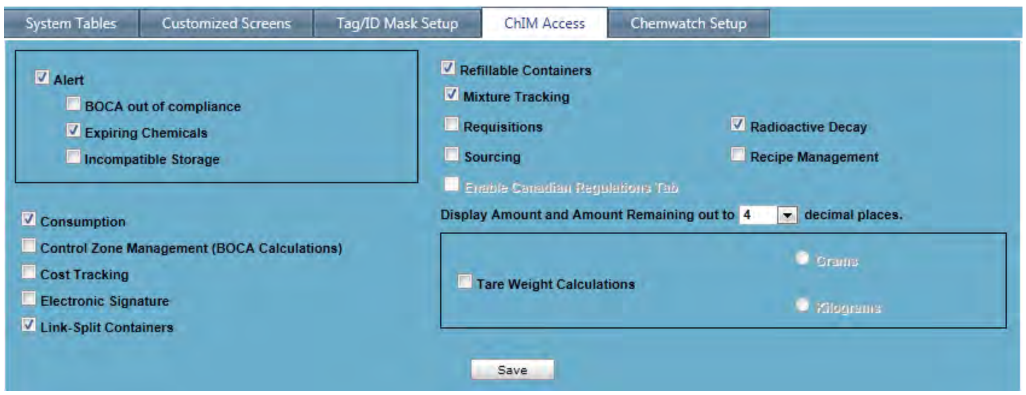
If you add and save a new record that is a mistake, you can delete it from the system without its being recorded in the inventory tables. You can use this delete function only from the Add window, and only while the record is still in focus in the Add window. If you discover the error at a later time, use the Update / Dispose option and identify the disposal method as an 'Entry error.' [Hint: include 'Entry error' as one of your Disposal system codes.]

Chemical Linking

Linking is used to create a parent-child relationship between records when a chemical container is split into smaller containers. You may link multiple items to a parent record.

<table>
<tr><th>Step</th><th>Your Action</th></tr>
<tr><td>1</td><td>

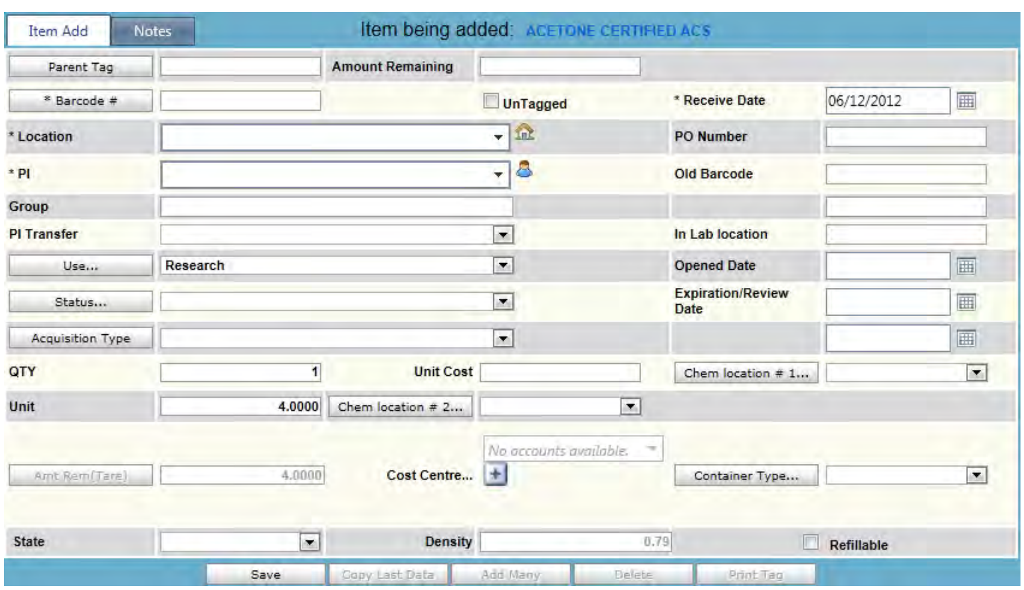
To enable this feature, select the **ChIM Access** tab on the Settings page, click the checkbox next to **Links-Split Containers** and click **Save**. This operation enables the **Parent Tag** button in the Add screen.



ChIM Access Tab

</td></tr>
<tr><td>2</td><td>

On the Item Add screen, select a catalog record. In the **Parent Tag field,** click to view all active inventory records for that substance and select one as the Parent record. OR (preferred) enter the tag number of the parent container and press **[Tab]** to display details of the parent record.



Linking - Parent Tag Field on the Add Form

</td></tr>
</table>

Add (continued)

Step	Your Action
3	Complete information for the child record (e.g. Barcode, Location, Amount, etc.) and **Save.** The amount remaining in the parent record will be decremented by the amount have defined in the new child record.

Add Calculating Tare Weight Values

The Tare Calculation supported in the Vertere Inventory Manager allows users to report the following values in grams or kilograms.

- Tare Weight (the weight of the lid, container, or container + lid)
- Net Weight (the weight of the contents of the container)
- Gross Weight (the sum of the tare and net weight values)

The **Tare Calc** buttons in Add, Update (Dispose), and Restore will be enabled only if your site administrator has enabled Tare Weight in Setup / Settings / ChIM Access Options.

In this system, tare values can be specific:

- Lid Weight
- Container Weight

If lid weight is not significant in your records, you can combine the lid and container weight into one value and enter it into the Container field.

VIM will calculate the following values (Gross, Net, Tare) that are dependent upon the 3 parts of the equation you enter:

Tare + Net = Gross
Gross – Tare = Net
Gross – Net = Tare

IMPORTANT: To use the Tare Calc option you must have density and physical state values for all records with volume units of measure. You can add those values to the system by completing the fields at the bottom of the ADD form.

For Net weight calculations from volume to mass, VIM calculates as:

Native unit * conversion factor * density

to arrive at the net amount in grams or kilograms.

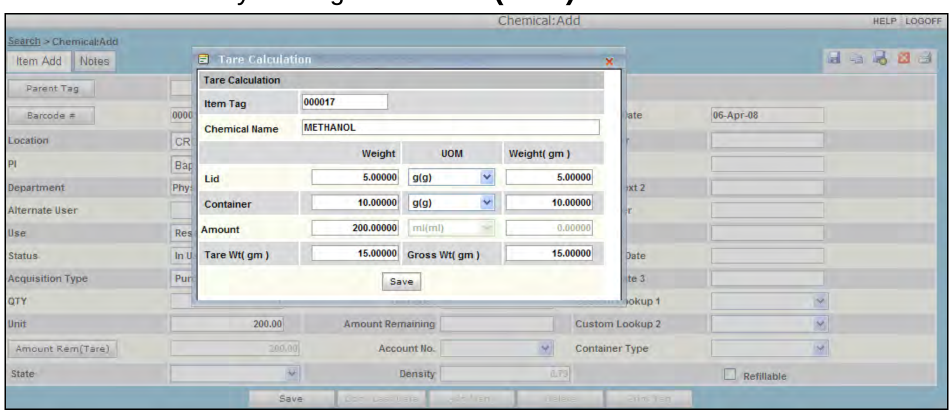
Add Calculating Tare Weight Values (continued)

For example, if the item is 500 mL with density of 0.87, the conversion to kilograms would be

$$500 * 0.001 * 0.87 = .435 \text{ Kg}$$

Normally, you will calculate tare when you add the inventory item, so the tare weight would be based on the original amount. If you have used some amount of the inventory item before you measure the tare weight, you can calculate the values in UPDATE and base it on the amount remaining.

Follow the table below to measure tare weight:

Step	Action
1	Ensure that the system operator has defined the correct measure for tare weight using the Setup / Settings / ChIM Access Options. WARNING: If you already have inventory items with defined tare weights and you change the measure (e.g., from grams to kilograms), the new measure (e.g., kilograms) displays for these chemical items. Because all values are stored in kilograms and displayed in your measure of choice, this change will affect only records that require microgram calculations.
2	When you add a container to your inventory using the **Add** function, you may define tare values by clicking **Amt.Rem. (Tare)** as shown below.  *Tare Weight Calculations* The button will enable only if you have the correct values for the selected catalog item: Amount, Unit of Measure (U-O-M) and for liquid and gas records, the physical State and Density. If these values are missing, you can enter them in the Add window.

Add Calculating Tare Weight Values (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>To record the tare values complete the fields as follows:
Do you have a balance connected to your computer and software installed to capture data from input devices?
If yes, the value from the balance will populate the highlighted field. Step through the fields as appropriate entering the lid, container (or container with lid) weights.
If no, key in the values and press Tab.</td></tr>
<tr><td>4</td><td>The system prompts you:<table><tr><th>If VIM</th><th>The Prompt Displays</th><th>Action</th></tr><tr><td>Calculates the tare weight</td><td>Tare weight recorded as: _____ grams or kilograms.</td><td>Click OK.</td></tr><tr><td>Does not calculate the tare weight (e.g., no density)</td><td>ChIM is unable to calculate tare because the density is zero. Enter the tare weight if known.</td><td>Click OK.
Measure the container only.
Type the tare weight and press [Tab].
At the prompt, “Tare weight recorded as:_____ pounds or kilograms,” click OK.</td></tr></table></td></tr>
<tr><td>5</td><td>Click OK</td></tr>
</table>

PLEASE NOTE: You cannot view or edit the tare weight values in the Add screen. You need to use the View/Update function in order to get into already existing tare values for a particular inventory item.

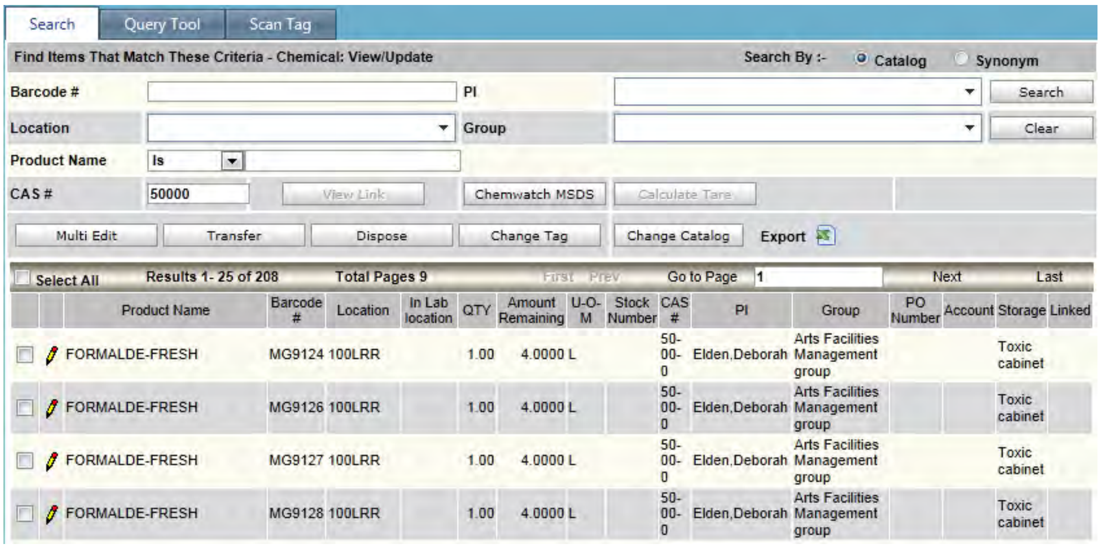
View/Update

Use the View/Update menu option to view inventory records, update a single record, transfer, dispose, or update one or more values in a select record group.

Search and Query Inventory Records in View/Update

Search, Query and ScanTag options are displayed at the top of the View/Update window in all modules.

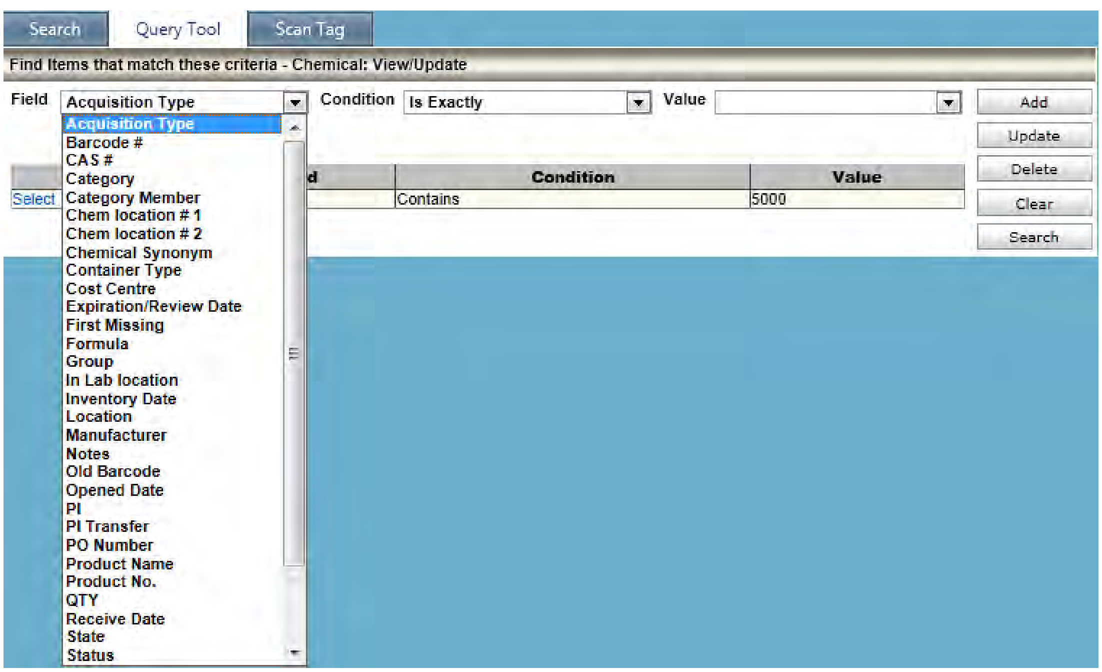
1. To search, enter one or more selection parameters, (e.g., item barcode #, CAS, user or location, chemical name) or click **Search** to view all records. You can use more than one of the displayed fields in your search.



Search Results in View / Update

View/Update (continued)

2. To query, click on the Query Tool tab for more options such as lot number or expiration date. Define your criterion and click **Add**; enter one or more criteria, then click **Search**.



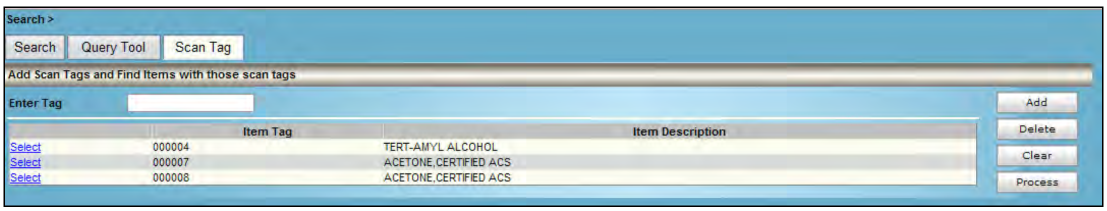
Query Tools Common to All Modules

View/Update (continued)

Scan Tag

Use Scan Tag to view a group of records that may not share a common value that can be used in the Search or Query tools. For example, if you have a list of tags that have been pulled from containers before their disposal, Scan Tag provides a quick way to enter all the tag numbers and process the entire batch of records in one transaction.

1. Click the **Scan Tag** button to enter a tag number.
2. Enter the tag number and press **<Enter>** or click **Add**. The cursor will return to the entry field ready for the next item.
3. If you scan/enter a barcode in error, highlight the record by clicking **Select** and then click **Delete** to remove it from the list. The Delete button does NOT remove records from active inventory. See Dispose below for the procedure to move items out of active inventory.
4. Click **Process** to display the records on the Results Grid.

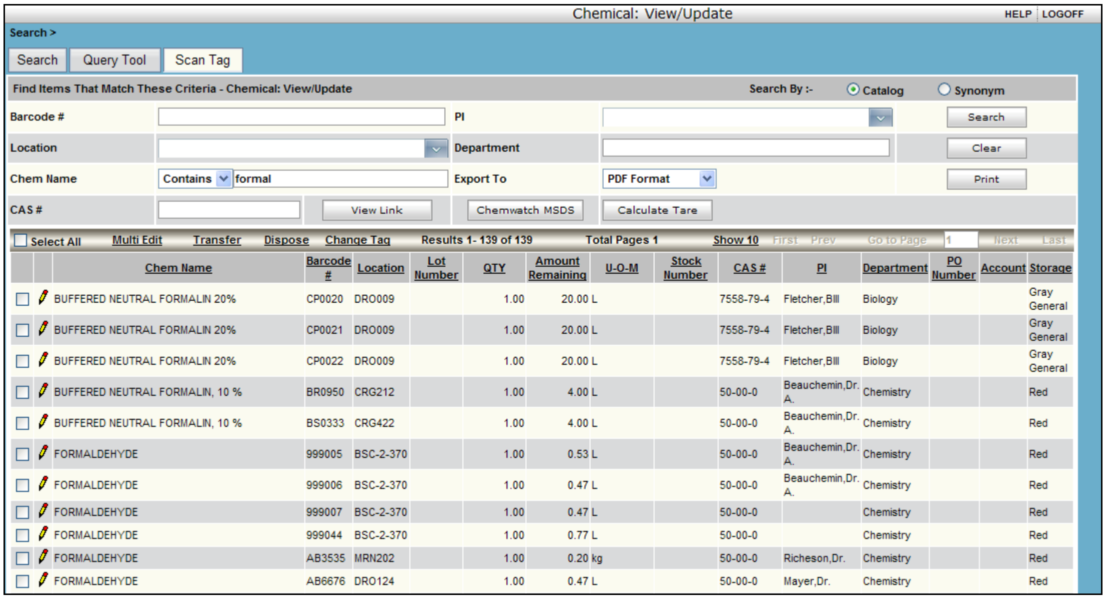


Scan Tags with 3 Items Added

The Results Grid

Whether you use the Search, Query Tool, or Scan Tag option to select records for updating or reporting, the selected records will display in the Results Grid as shown below. These records are immediately available for editing, or for printing, e-mailing, or storing as spreadsheets or other data formats. For more detailed reports or to include calculations, use the Inventory Manager's built-in Crystal Reports by Seagate.

1. Click **Print** to print the results to a PDF file or to save them to a spreadsheet.
2. Click in the **Select** column to check one or more items from the same page for editing.
3. Click the **Select All** box to check all items on a page for further processing.
4. Click the **Show All** button and then **Select All** to check all items if the results are shown on multiple pages.
5. Select one record and click **ChemWatch MSDS** to view the CG-II version of the data sheet.
6. If tare weight is enabled, select one record and click **Calculate Tare** to update the amount remaining in a container by placing the container on a balance for automatic recalculation or for manual data entry of the new gross weight. The system will calculate the amount used or refilled and create the appropriate consumption or refill record.
7. If linking is enabled, select one record and click **View Link** to view the parent or child record(s) as appropriate.



Query Results with Update Options for Selected Records

Use the following buttons to select records for editing.

Select All – Click Select All to place a checkmark in all rows displayed in the results grid. Check the Select All box again to remove the check mark.

Clear All – To remove the checkmark when the Select All option has been used, click in the Select All box to remove the checkmark from all rows previously selected.

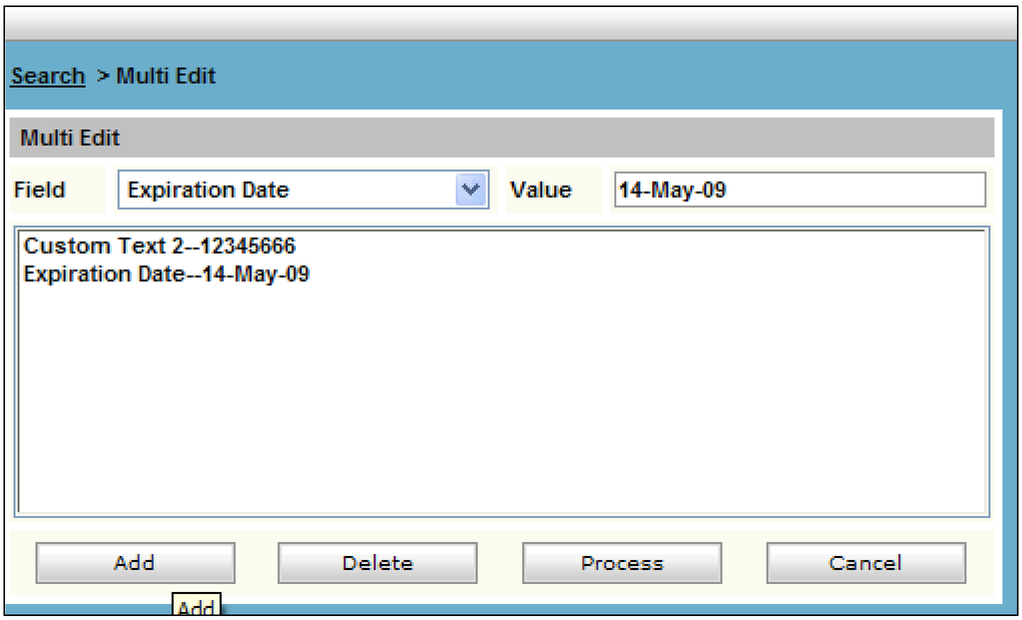
To select a single record, click the edit icon ( ) in to view details for that record, to print the barcode tag, or to update a record. (Locations and users can be updated only through the Transfer function.) Each tab page contains information about the item. Details on using these options are provided in the section VIEW/UPDATE – Details sections that follow.

View/Update (continued)

Multi-Edit

Use the Multi-edit option to change several values within one or more inventory records. Use Transfer to change location or user information.

1. Mark one or more records displayed in the Search Results grid by clicking in the **Select** field. A check mark displays in the Select box.
2. Click the **Multi-Edit** button to update information such as lot number, expiration date, or status for the entire set. You can edit more than one value at a time.
3. Select the field to be edited from the drop-down box, enter the new value, and click **Add**.
4. When all fields have been defined, click **Process** to update all selected records with the new values.



Multiple Edit

Note: If you change values that have been used in your search or query process, all of the records you modify may be removed from the search results grid because they no longer meet the search/query criteria.

Transfer

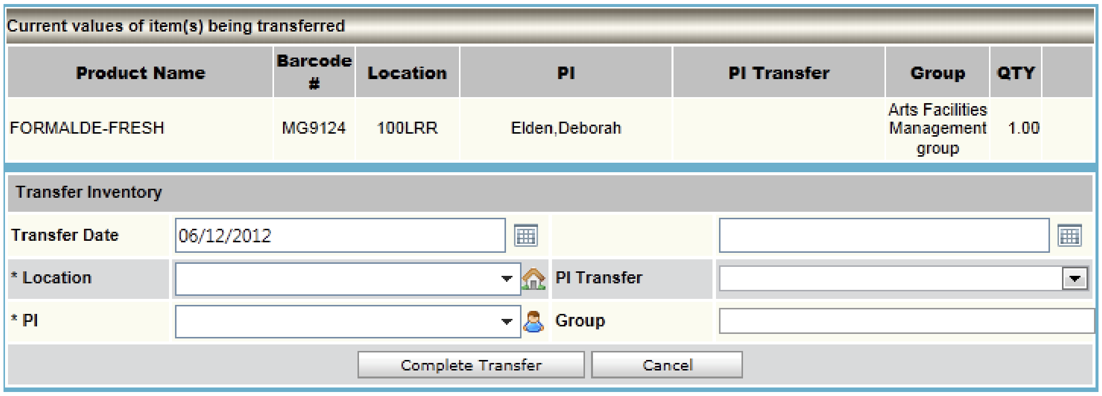
Use the transfer option to change the location, the user / group, or the alternate user associated with one or more records in a select record group.

1. Mark one or more records displayed in the Search Results grid by clicking in the Select field. A check mark displays in the Select box.
2. Click **Transfer** to update the location, user, or group.
3. If the item is being transferred to a new location, click in the Location field to view the Location tree and select the new location. If you have associated a user and group with the location, they will display when you select the location. In the example below, only a group has been associated with the location; you can change the user and group.
4. If the item is being transferred to a new user or group, click in the user (PI in the following example) field to view the User/Group tree and select the new user, group,

View/Update (continued)

or user and group.

5. If the item is being transferred to a new alternate user, select the user from the dropdown ('Alternate User' in the following example).



Transfer Inventory

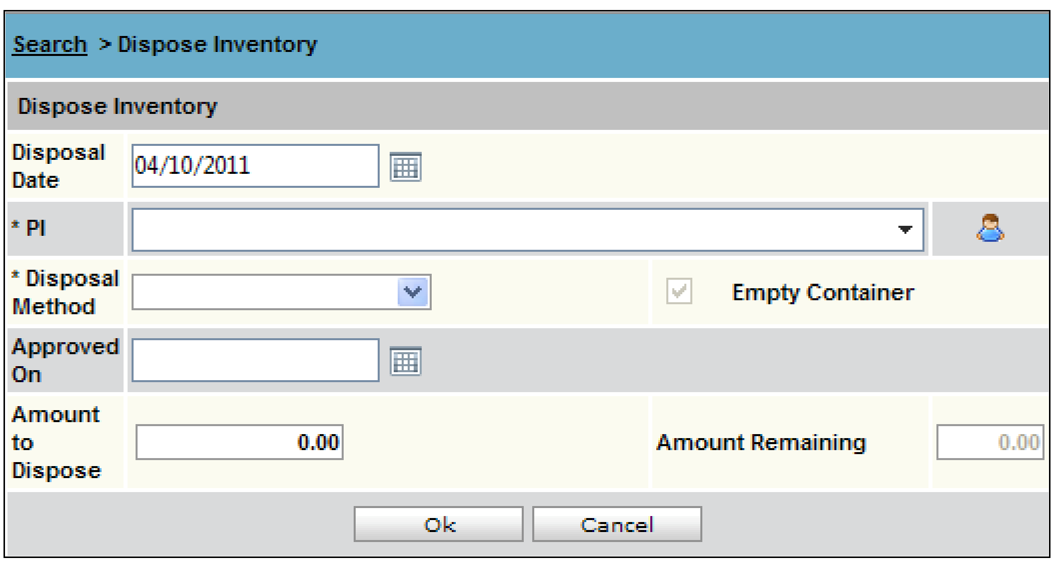
When all fields have been defined, click **OK**.

Dispose

Use the Dispose option to remove one or more records from the active inventory records.

Note: Only select a group of records for disposal if all of the containers will be marked as Empty. To record the amount disposed as greater than zero, select only one record for disposal processing.

1. Mark one or more records displayed in the Search Results grid by clicking in the Select field. A check mark appears in the Select box.
2. Click **Dispose** to display the Dispose Inventory form.



Dispose Inventory

3. Complete the fields required at your site: disposal date, user who approved or processed the disposal, the disposal method from the drop down list, the disposal approval date (if any). You cannot enter a future disposal date.
4. If you are disposing of more than one container, the 'Empty Container' field will be checked automatically. If you are disposing of a single container that is empty, be

sure to mark the item an ‘Empty Container’.

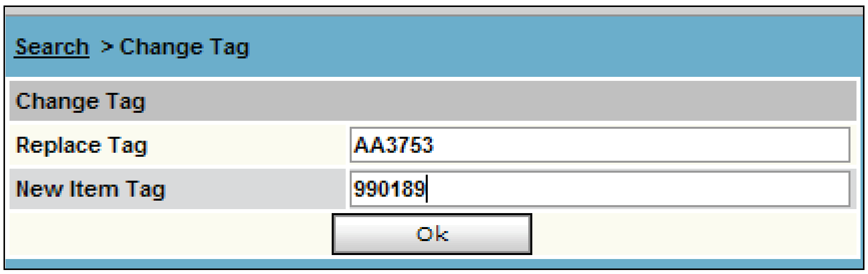
5. The ‘Approved On’ date cannot be greater than the ‘Dispose Date’.
6. Click **OK.**

View/Update (continued)

Change Tag

Use the Change Tag option to replace a barcode tag number with a new number. This procedure will be helpful if you are using pre-printed barcodes and a tag is damaged. If you are printing barcodes for your inventory, reprinting the tag is the preferred option.

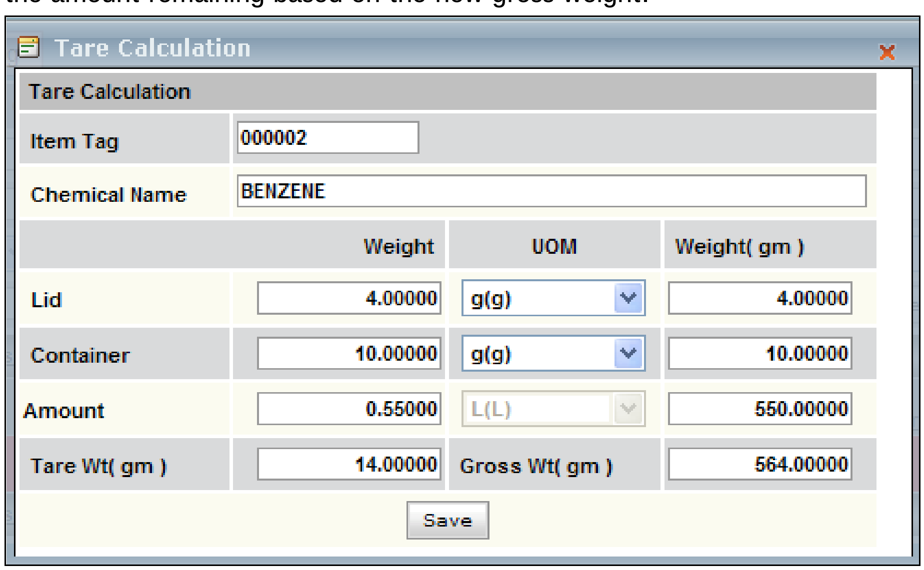
Step	Action
1	Mark one record displayed in the Search Results grid by clicking in the Select field. A check mark displays in the Select box
2	Click **Change Tag** to view the Change Tag detail form.
3	Enter the New Tag value and click **OK**. You cannot reuse a tag number.



Change Item Tag

Update Tare Weight

To update Tare Weight values, use **View/Update**.

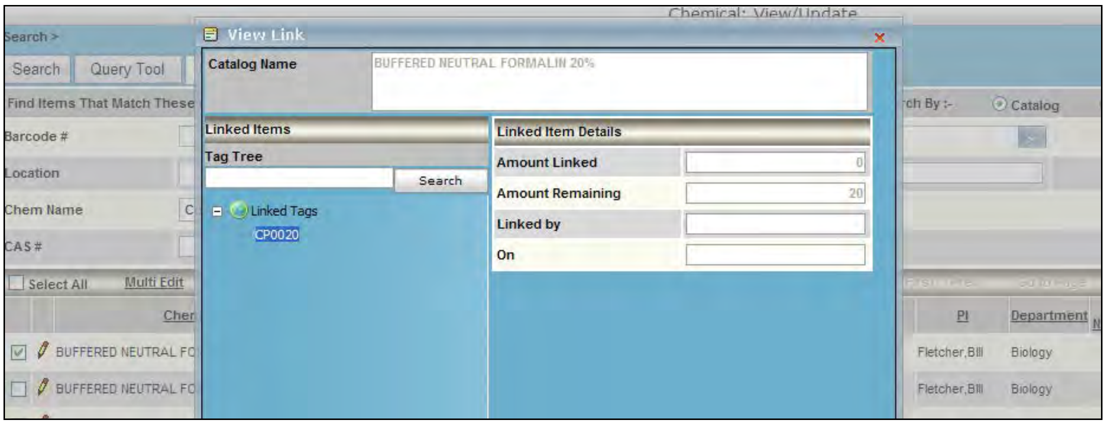
Step	Action
1	In View/Update, locate and select the record of choice using Search or Query tools. You must click in the **Select** column to enable the Tare Calc button.
2	Click **Tare Calc** to display and update the stored values. The cursor defaults to the Gross Weight field to enable you to use a balance. The system will update the amount remaining based on the new gross weight.  *Update Tare Weight*
3	Or you can double click on the row to display the detail screen, and then select

	the **Consumption / Refill** tab. Any change in either consume or refill will cause the system to update the tare values.

View/Update (continued)

View Linked Records

To view linked records, select the Parent or Child record in the Results Grid and click **View Link**. You can have multiple children under a single parent.



Linked Items

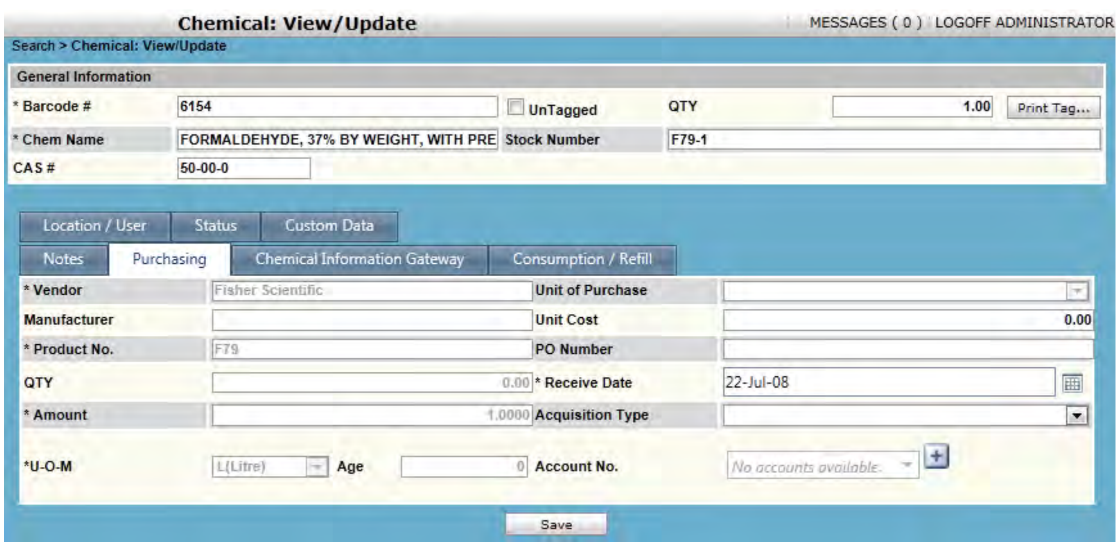
The above image shows the parent-child relationship tree. It also displays the linked amount.

UPDATING DETAILS

To view or update details of a single record, double click on the row to display the Inventory Item tab pages.

Purchasing Tab

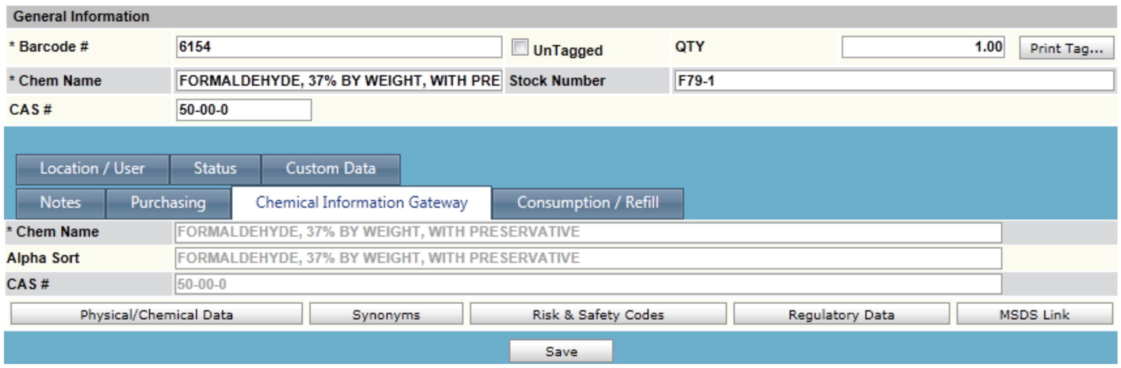
The Purchasing tab page includes information about the product, the original amount and unit of measure, as well as information about the purchase itself.



Purchasing Detail for Inventory Item

Chemical Information Gateway Tab

Use the Chemical Information Gateway tab page to view or update information about the substance. The information in the Gateway pertains to all substances that share the CAS or if no CAS is available, all substances that share the product number and vendor.

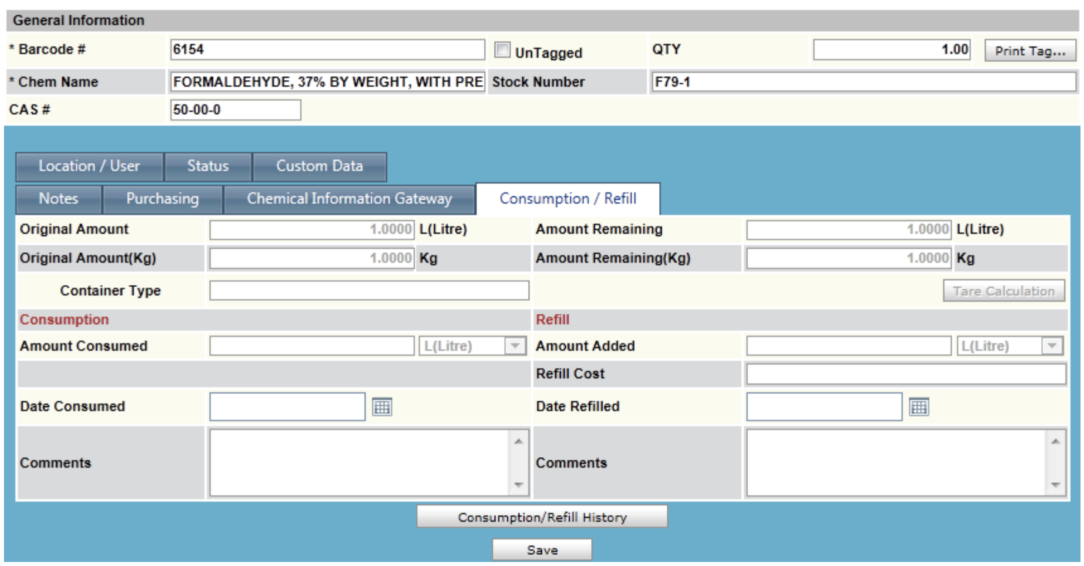


Chemical Information Gateway in Inventory Item Detail

View/Update (continued)

Consumption / Refill Tab

Use the Consumption / Refill tab page to view or update information about the amount remaining in the container. To use the Consumption or Refill options, these functions must be enabled by the System Administrator in Setup / Settings / ChIM Access.



Consumption / Refill for Inventory Item

<u>Consumption</u> - To record consumption complete the following steps:

Required field: Amount Consumed

Step	Your Action
1	Click **Consumption/Refill** tab**.**
2	In the Amount Consumed field, enter the amount you have used. The amount must be recorded in the original unit of measure. The system will warn you, but allow you to report consumption of an amount that exceeds the original amount recorded. This is so because the exact amount in a container may vary slightly.
3	Edit Date Consumed field as required BY your site procedures. It will default to the current date.

4	Enter any comments about the use of the substances, for example, the purpose of the use, the project, lab prep, etc.
5	Click **Save.** The amount remaining will decrement.

<u>Refill</u> - To refill a container, the container must be identified as 'refillable' when the record is created. To record a refill operation complete the following steps:

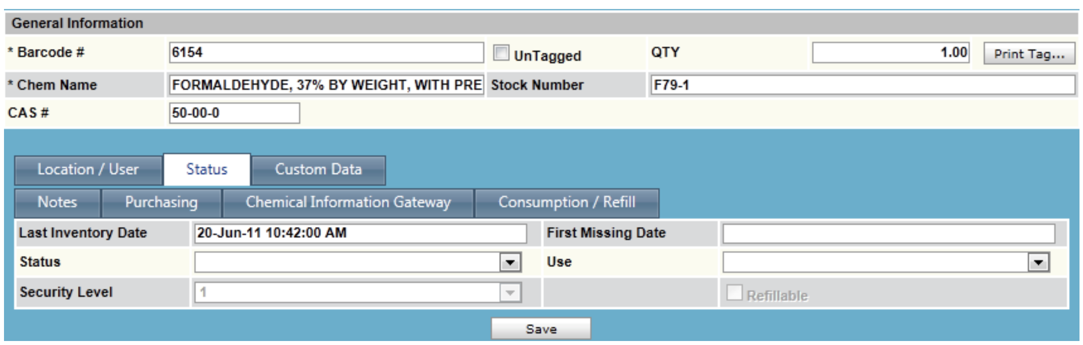
Required field: Amount Added

Step	Your Action
1	Click **Consumption/Refill** tab**.**
2	In the Amount Added field, enter the amount you have added to the container. The amount must be recorded in the original unit of measure. The system will warn you, but allow you to report a refill of an amount that exceeds the original recorded capacity of the container. This is so because the exact container may hold an amount that exceeds the amount delivered in the container.
3	Enter the refill cost as appropriate.
4	Edit the Date Refilled field as required by your site procedures. It will default to the current date.
5	Enter any comments about the refill process, for example, the source of the substance.
6	Click **Save.** The amount remaining will increment.

Module Menus –View/Update (continued)

Status Tab

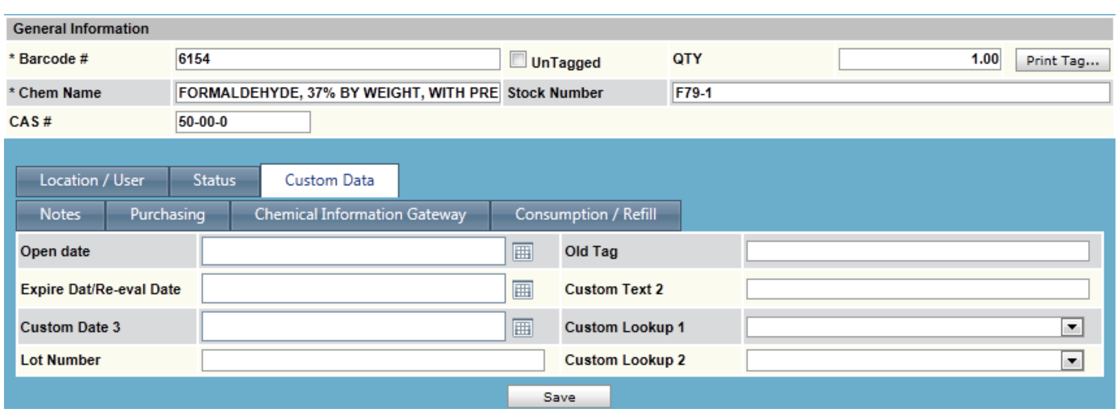
Use the Status tab page to view or update information about the status or use of the substance.



Status for Inventory Item

Custom Data Tab

Use the Custom Data tab page to view or update the custom text, custom date, and custom lookup values associated with the container record.



Notes Tab

Use the Notes tab to view or update notes associated with the container record and to view catalog notes (if any) about the substance. The tab label changes to 'View Notes' if notes have been recorded either with the catalog or the container.

If other notes have been recorded for the item, click **View Previous Notes** to review those entries.

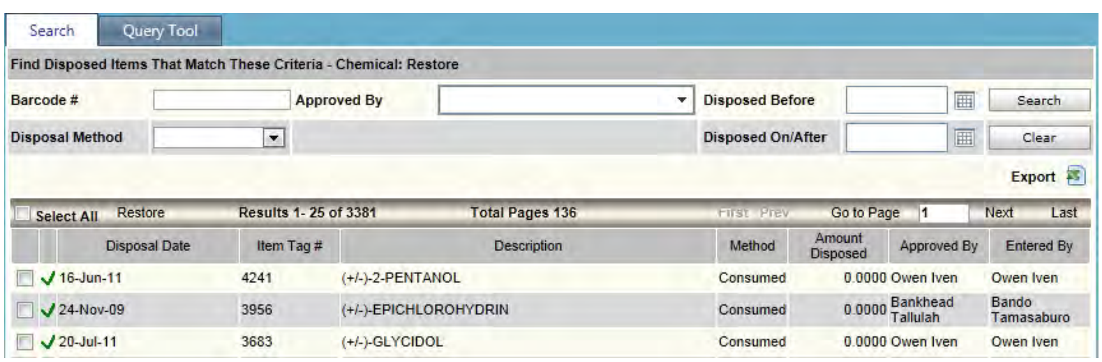
Notes for Inventory Item

RESTORE

Use the RESTORE option to return one or more records in a select record group from the inactive inventory record set to the active inventory.

Usually, restore is required because items are disposed in error. To restore an item,

1. Go to the **Chemical (or Biological) Inventory / Restore**.
2. Enter the item barcode number to restore, or enter search criteria to display one or more records.
3. Mark one or more records displayed in the Search Results grid by clicking in the Select field or by using the **Mark All** or **Mark Selected Items** option.



Chemical Restore with Selected Items Highlighted

4. Click **Restore** in the bottom right corner to return the item(s) to the active inventory.

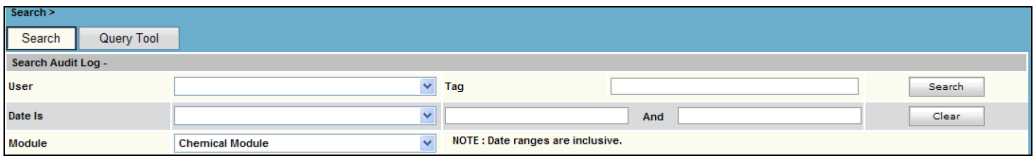
Note: The records you restore will be removed from the search results grid because they no longer meet the search criteria.

If items were disposed as ‘empty’ containers, they will be restored with the amount remaining equal to zero. To update the amount remaining, use the View/Update option, select the individual item, double click and user the Refill option to correct the amount remaining in the container.

Audit Log

Use the Audit Log to review Add, Edit and Dispose transactions. Access to the Audit Log is a right that can be associated with Roles you define in the system.

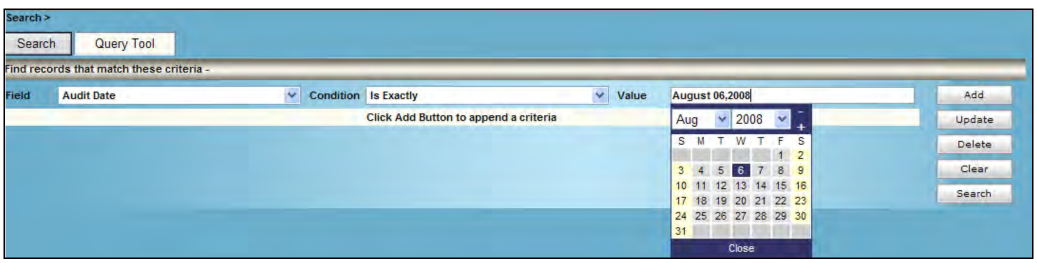
All changes to inventory records are stored in the audit log. Each record includes the date and time of the transactions, the identity of the user who completed the transaction, the type of transaction, and the 'change from; and 'change to' values.



Audit Log Search Options

Search the database by user name, tag number, or date range options.

Use the Query Tool to search for specific transactions such as Audit Date shown below.



Query Tool in Audit Log

Table Relationships: INV_CATALOG and C_MASTER

MASTER ID

The IM tables are linked to ensure data integrity and to minimize the data entry required to maintain complete inventory, physical, safety, and regulatory information.

As shown in the following diagram, the INV_CATALOG table is the main repository for the chemical data provided by vendors. It is a listing of vendor-product-size specific records.

From the Catalog, you retrieve a record that defines the nature of an inventory item—its description, vendor, product number, amount and unit of measure. The catalog record in turn is used to define your INV_ITEMS records.

The Catalog is also used to create the C_MASTER table. This table is a link to all of the physical, safety, and regulatory details about your chemicals. Master records are created based on one of the following criteria and all catalog records that meet these criteria share a single master record.

- CAS
- CAS + (State and Purity)
- Vendor + Product Number (no CAS)

This means that all catalog records that share CAS=50-00-0 (with or without state of liquid) but that do not have state <u>and</u> purity values share one master ID number

All catalog records that share CAS=50-00-0 and are defined as Liquid with Purity of 37% share another master ID number.

When no CAS is available, the vendor identification and the vendor's product number identify a specific product. The item can be only one state and purity.

Take care with mixtures that may be delivered to you with a CAS associated with a pure substance. If you are creating a mixture record for a chemical with a CAS number, be sure to create a separate master ID by defining the purity of the substance. If, for example, it is only 25% of the substance with a CAS number, be sure to specify the state and purity of the mixture record. Mixtures are linked to the master ID—so all substances of the same type should be linked to the same master ID.

Benefits

Why do we use this method? To simplify data management.

The Inventory Manager has tables for many characteristics of your chemicals:

- Fire Codes,
- Physical Properties,
- Regulatory Data,
- Canadian Regulatory Data,
- Synonyms,
- Health Hazards,
- NFPA and HMIS values,
- Risk and Safety Phrases, and
- Material Safety Data Sheets.

TABLE RELATIONSHIPS: Benefits (continued)

A strategy is required to limit repetitious data entry. The C_Master table allows us to maintain one (or perhaps two or three) records for each of the standard reagents. You maintain one set of records for CAS 50-00-0, but two for substances such as nickel which may be in solid or powder form, and may, in addition to their different physical data, have different safety and regulatory requirements.

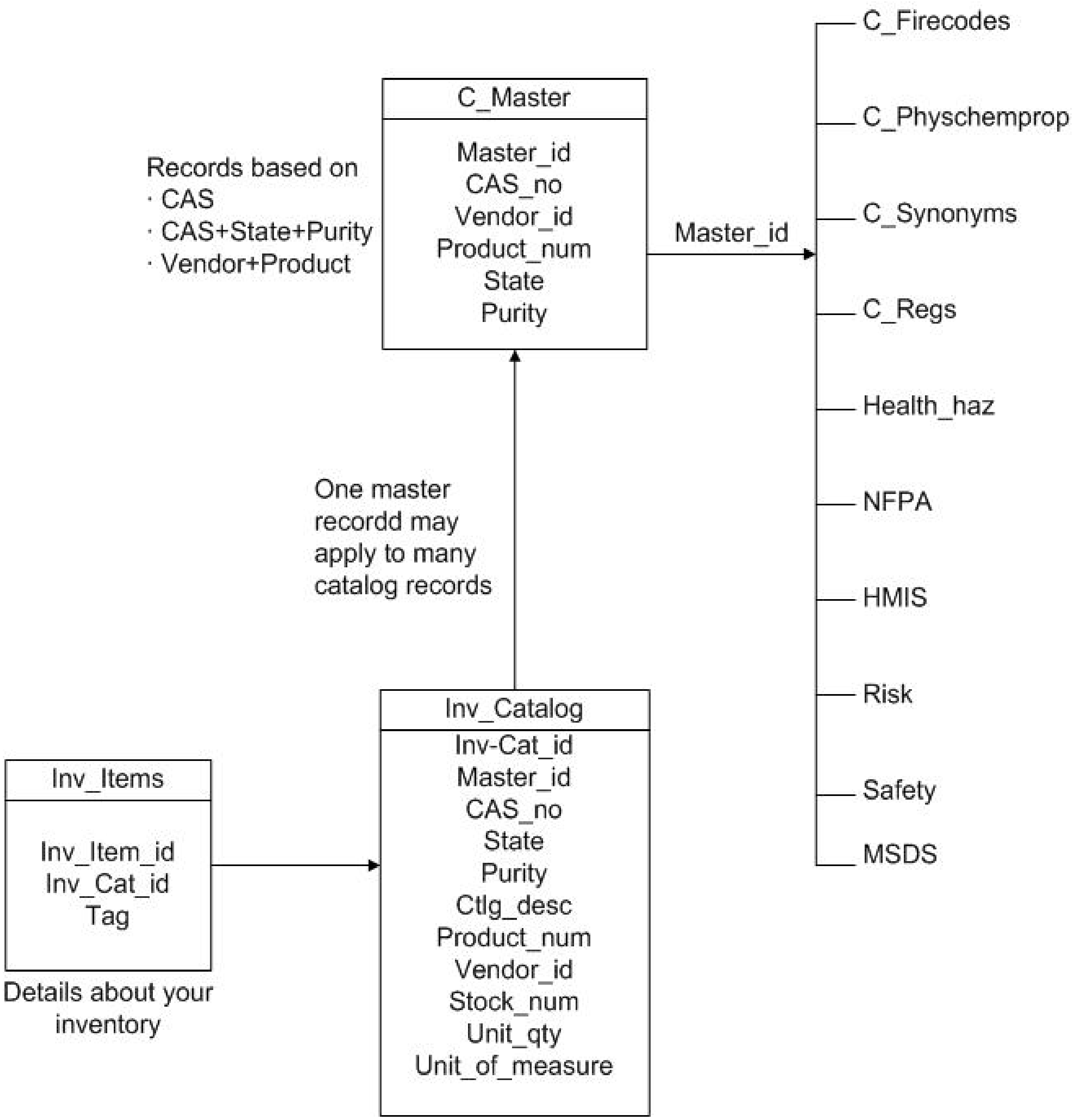
Another example is oxygen. You may have one record for gaseous oxygen and another for liquid oxygen. The storage, shipping, and BOCA requirements will differ significantly with these two items.

The Inventory Manager is delivered with over 240,000 catalog records representing over 85,000 unique products. Each comes with an associated Master record.

As you add new items to the catalog, the program will check the Master table, determine if a record exists and if it exists, prompt you to define if you are modifying an existing record or creating a new record. If no record exists, it will create a new Master record.

Only after a Master record is identified will you be able to view or update the associated records in the linked tables.

The following pages identify the screens for physical, safety, and regulatory data.

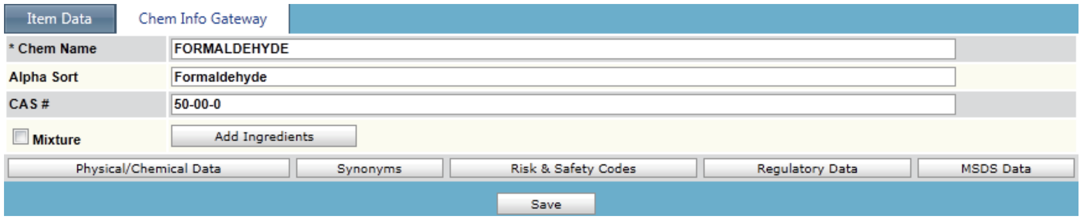


Vertere Inventory Manager Table Relationship

TABLE RELATIONSHIPSChemical Information Gateway

The Chemical Information Gateway allows quick access to a full range of chemical data, including the ChemWatch Chemical Database.

Users can access the Gateway from the Catalog, the Add inventory, or the Update menus.



The Chemical Information Gateway Option

Biological Information Getaway

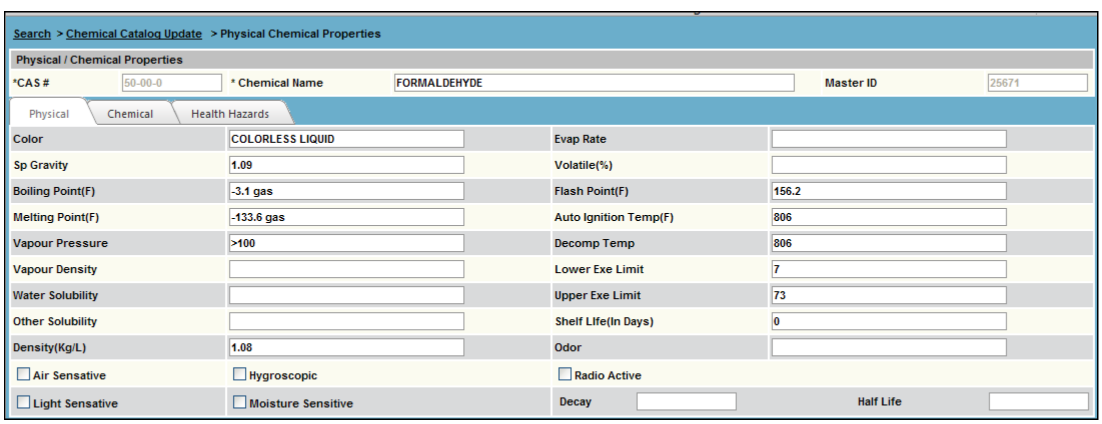
The Biological Information Gateway allows quick access to the various Biological information screens.

Physical/ Chemical Data

The following fields are available for physical properties. Data as provided by the vendors and by ChemWatch will be included as available and as appropriate.

Populating the shelf life value will cause the system to calculate the expiration or re-evaluation date (custom_date_2) for new inventory items as they are added to your Inventory records. The calculation is acquisition date + shelf life.

Density is required for conversion of your unit and unit of measure values into kilograms—a consistent value for use in reports and total calculations.

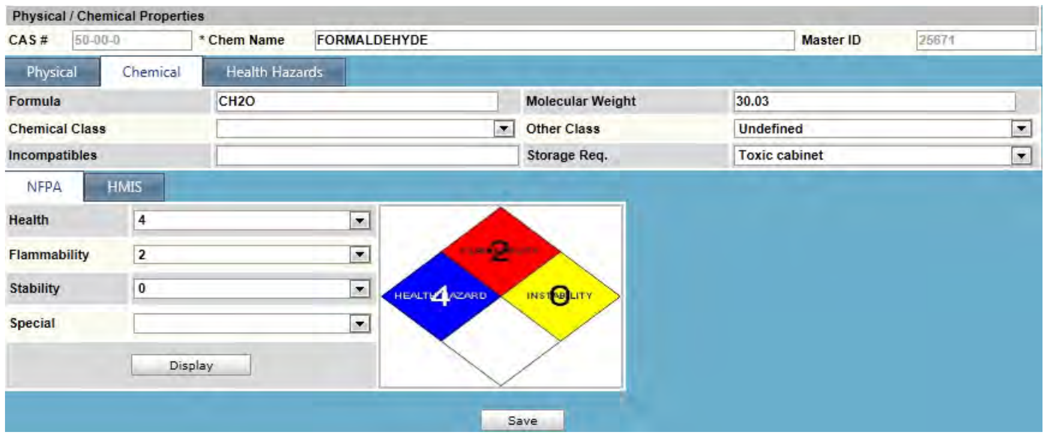


Physical Properties

TABLE RELATIONSHIPS
Chemical Data

NFPA values for all items in the NFPA704 list are provided with IM. This list includes only chemicals with a valid CAS number. For any record that does not already have the NFPA values, you can add them.

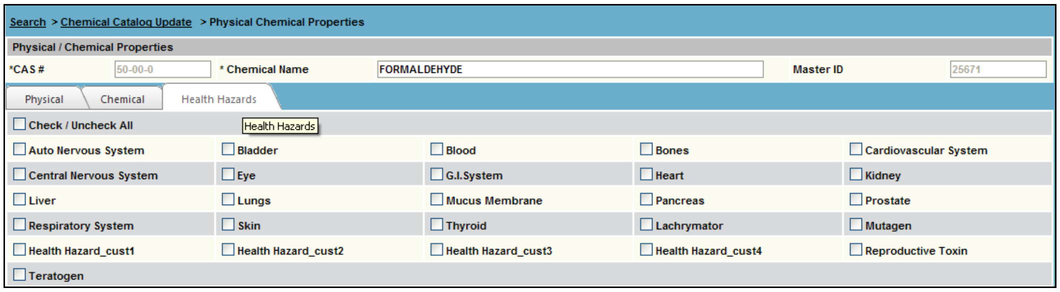
HMIS values are not provided and cannot be stored in version 1 of the Inventory Manager.



NFPA and HMIS Values

TABLE RELATIONSHIPS Health Hazards

Place a checkmark in the box to the right of the hazard(s) associated with the chemical named in the Description field. Four optional, user-definable values are provided and can be customized by using Setup / Settings / System Tables menu.

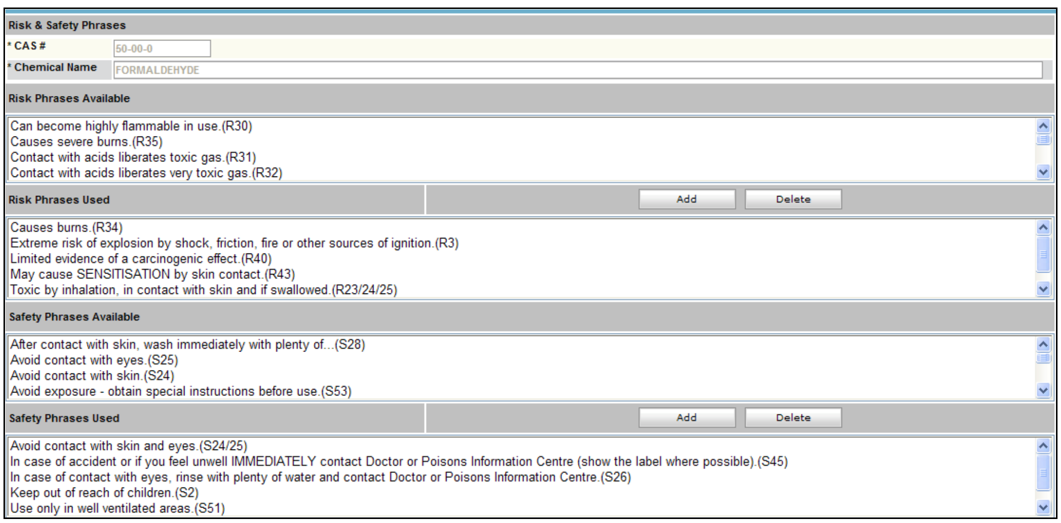


Health Hazards

Risk and Safety Codes

The European Risk and Safety Phrases help you identify the hazards associated with your chemicals.

You can modify the delivered values by clicking on the Add or Delete button and adding or removing new phrases for your chemical master.

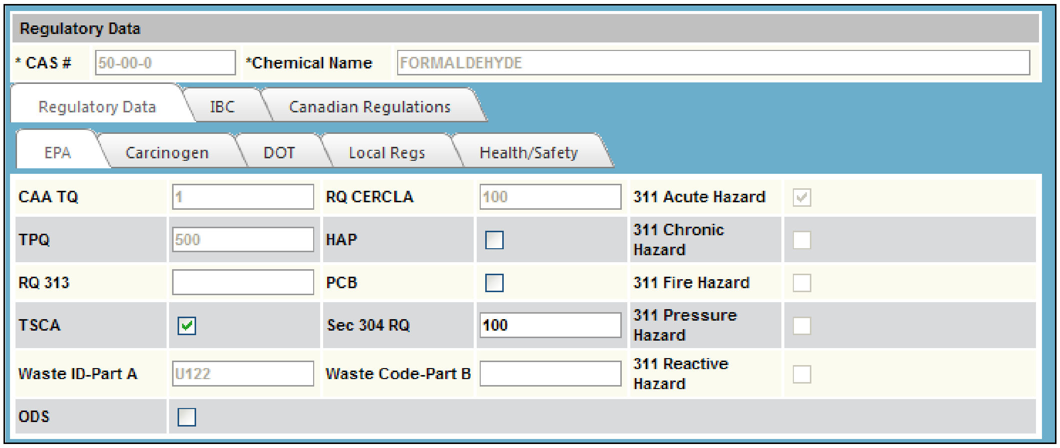


Risk and Safety Phrase Windows

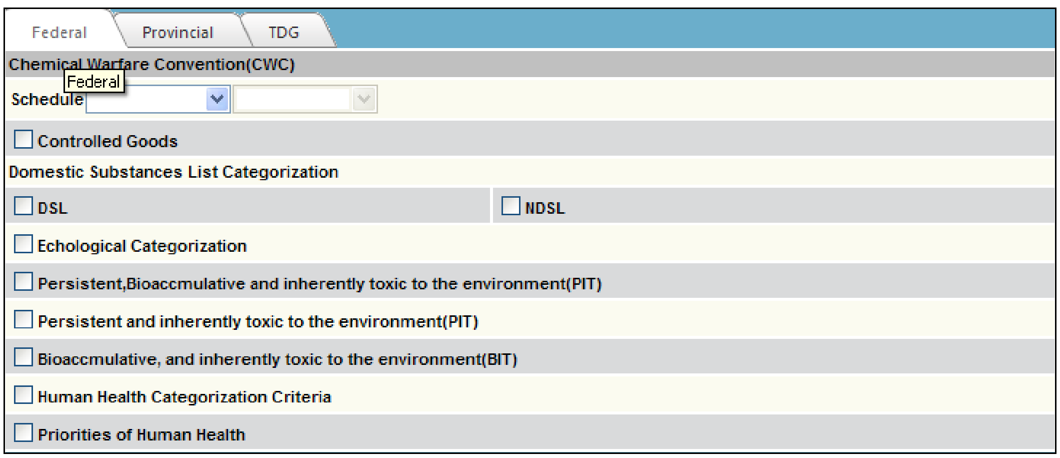
TABLE RELATIONSHIPS
Regulatory Data

The regulatory data provided with the IM will help you comply with Federal, state, and local regulatory guidelines.

Can



Regulatory Data



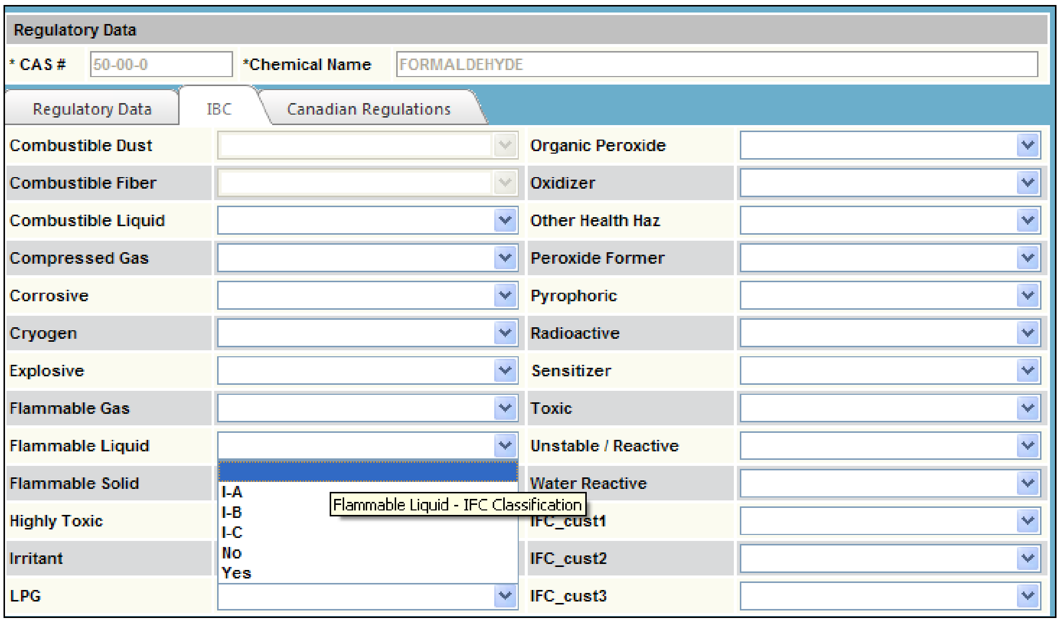
Canadian Regulatory Tabs

TABLE RELATIONSHIPS: IBC

Users who must comply with International Building Code (IBC) guidelines that limit the quantity of flammable and other hazardous substances within an area can define the hazard class for each of the hazard types identified in the IBC guidelines.

Locations can be divided into Control Areas to allow the IM to monitor the quantity of hazardous materials stored within each area, comparing on-site quantities with the exempt amounts. Exempt amounts for each named hazard type are defined for each Control Area using the Exempt Amount button in the Location Tree.

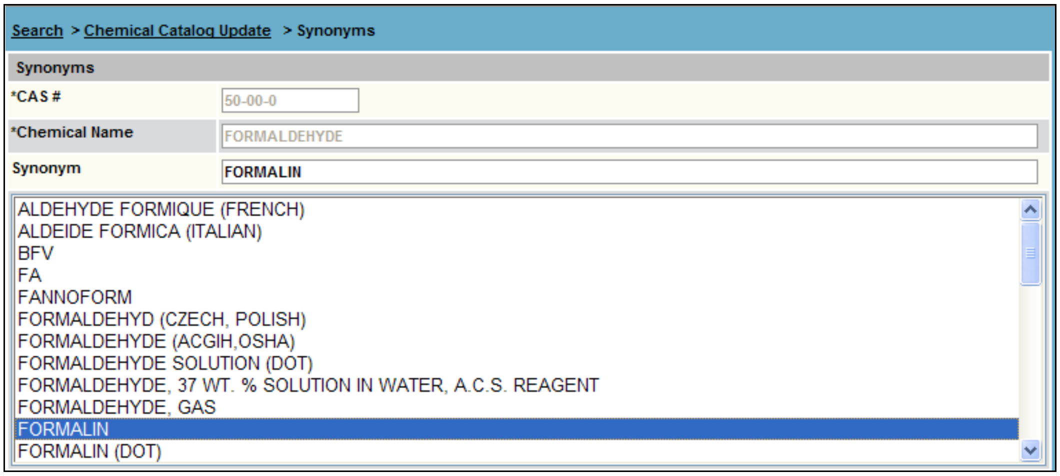
The following fields and their respective options are drawn from the BOCA 2004 guide. All values can be edited or deleted by using the Setup / Settings / System Tables menu and other values can be added. Three optional, user-definable fields are provided.



IBC Hazard Types for Control Area Management

TABLE RELATIONSHIP
Synonyms

The IM includes a set of more than 60,000 synonyms. You can delete, modify, or add new synonyms. These values are used in defining mixtures so that you can pick a generic name like 'acetone' rather than a product specific name like 'acetone, A.C.S. Reagent Grade.'

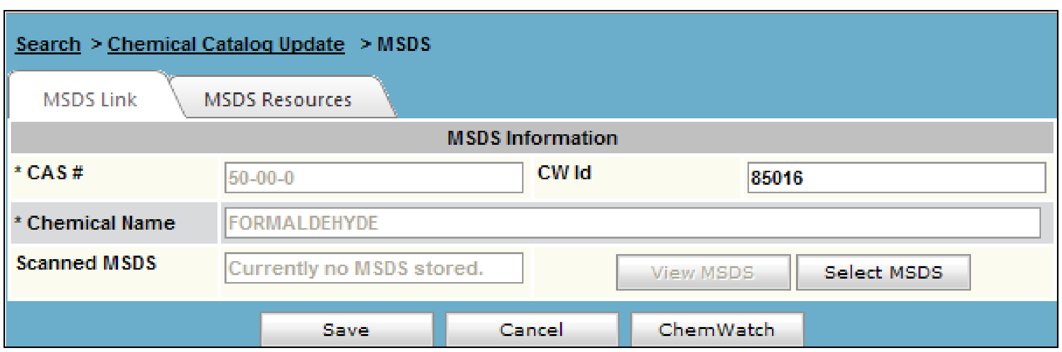


Synonym Maintenance Window

MSDS Link

The link to Material Safety Data Sheets supports several options.

Define the path to CG-II, ChemWatch and MSDS Resources in Setup / Vendors. Both CG-II and ChemWatch should be defined on the ChemWatch vendor record. Any path you define for other vendors will be displayed under the MSDS Resources option.



MSDS Link Maintenance Window

- Click **CG-II** to link to ChemWatch Gold2 on the web.
- Click **MSDS Resources** to link to other MSDS resources such as the Sigma-Aldrich or JT Baker CD or web sites.
- Click **Scanned MSDS** to define the path to a scanned or copied MSDS or to view a previously defined MSDS resource on a local server.

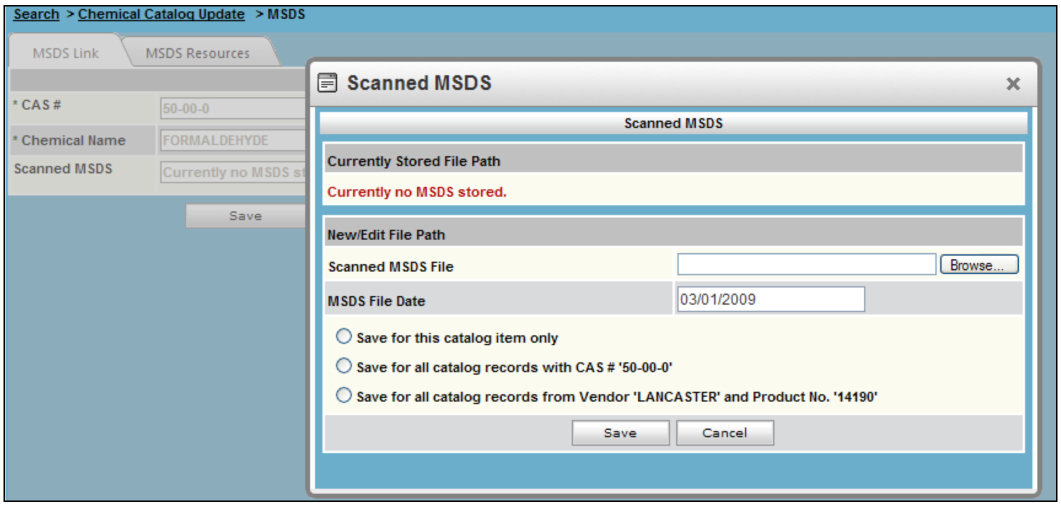
TABLE RELATIONSHIPS
MSDS Links

Scanned MSDS

To define the path to a scanned or copied MSDS, complete the following steps:

Use the System / Administration / Scanned MSDS menu option to define the preferred storage location for your documents. (See Section 6, Administration.) Your MSDS documents may be scanned or copied and pasted into your preferred location. They may be in .pdf, .doc, .txt or .xls format.

When you view the scanned MSDS page, you will see immediately if a data sheet has already been associated with this catalog item. In the example below, no MSDS has been stored.



Scanned MSDS Path and Options

To associate a data sheet with this catalog record, complete the following steps.

1. Click **Select MSDS** to browse and locate the MSDS. The MSDS may be in .pdf, .doc, .txt or .xls
2. Define the MSDS date; this can be the date on the data sheet, the date you create the file, or your site can define the date as the expiration date for this data sheet.
3. After you locate the MSDS and insert the date, determine which of the three options apply.
   a. The MSDS is for this catalog record only.
   b. The MSDS applies to all catalog records that share the item's CAS value.
   c. The MSDS applies to all catalog records that share the vendor and product number; it covers all sizes of the defined product.
4. Click **Save**.

TABLE RELATIONSHIPS: *ChemWatch Data*

Link directly to ChemWatch, to ChemWatch Gold2 (CG-II), or to the ChemWatch Collection—over 1 million vendor-specific data sheets.

ChemWatch 'Red Screen' – Access point to complete data

5. INVENTORY - VIEW ONLY

Intended Audience

This section is provided for users whose Role excludes editing permissions within the system. Review Section 4 for detailed instructions for editing inventory records.

System Overview

The Vertere inventory Manager includes functions for managing chemical, biological, and equipment inventory within a research organization. These functions offer cradle-to-grave controls and use barcodes for item-level identification and tracking. Your site will have defined the functions you will use, the data elements that will be included and the field names displayed in each module.

If you have been assigned lookup rights only, you will be able to search the records in modules to which you have access. The inventory records that will be available to you will depend upon the security settings put in place by your Site Administrator. You may be able to view only those records assigned to you individually, or only those records associated with your research group, or you may see all records associated with your department or with your organization. Your Site Administrator will tell you what to expect.

Login

To access the Vertére system, enter the URL defined for your installation. You can use Internet Explorer, Firefox, or Safari as your browser. Save the path as a Favorite or create a shortcut on your desktop.

Your site administrator will assign the User Name and the Password you will use to log in the first time. Your password is case sensitive, so be sure you enter it exactly as provided to you.

To log in to the Vertére system, enter your User Name and Password and click **Submit** or press **[Enter]**. The User Name field on the System Login screen will blank if you do not complete the logon.

Change Password

Change Password

Change your password the first time you log in. The following Change Password window will display.

Periodic Change Password Reminder

To change your password time, complete the following steps.

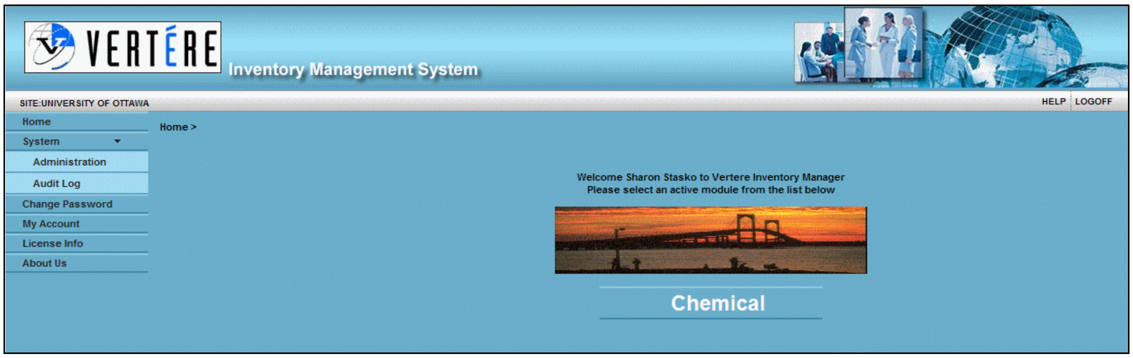
Step	Your Action
1	Enter your 'Current Password' (the initial password assigned to you) and press **[Tab]**.
2	Enter your new password (at least 6 alphanumeric characters). The password IS case sensitive and it cannot include your user name.
3	Enter your new password a second time.
4	Click **Save**. If you have entered a new password' and correctly confirmed the password, the system will return 'Password Changed Successfully.'

Change Password (continued)

The system will prompt you to change your password in accordance with the password rules defined by your site administrator. The Change Password window will display and you will change your password as defined in Steps 1-4 above. To change your password at a later time, select **Home/Change Password** and complete Steps 1-4 above. Select **[Home]** to continue.

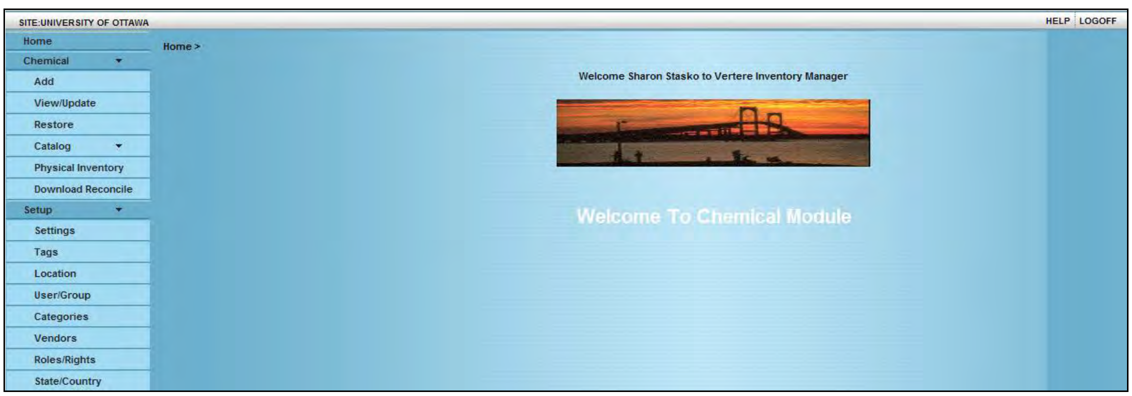
Module Menus

The menu choices reflect the currently available modules. In the following example, the user is logged into the Site = University of Ottawa and the Module = Chemical.



Site and Module Menu

Click the **Chemical** button to launch the application. The following menu will display. The Reports menu will display only if your role includes Report access.



Chemical Menu

Select the View/Update option from the Chemical Menu.

Logoff

When you have completed your search task, be sure to Logoff by clicking the **Logoff** at the top fight of the Inventory Manager screen.

View/Update

Use the View/Update menu option to search and view inventory records. If you need to update a single record, transfer, dispose, or update one or more values in a select record group, request additional rights from your Site Administrator.

View/Update (continued)
Using Search, Query Tool or ScanTag

How to Search and Query Inventory Records in View/Update

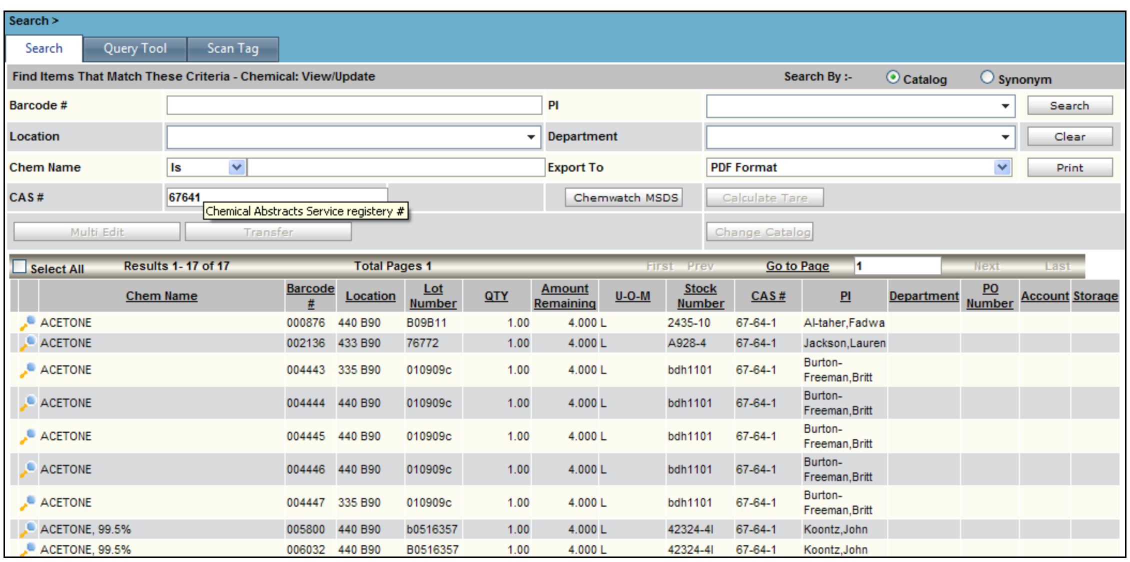
Search, Query Tool, and Scan Tag tabs are displayed at the top of the View/Update window in all modules. Use one of these methods to locate items of interest.

Search - use one or more of a defined set of six most commonly used values.
Query Tool – use to search on one or more of the values associated with container records.
Scan Tag – use to search for a list of specific tag values.

The Search values are defined in the following table. Remember, the field names may vary at your site; however, the purpose of each field remains the same. Also remember that your Site Administrator's security settings control which records you may see.

Field	Used to . . .
Barcode #	The tag number assigned to each inventory item.
Location	The place where inventory items are stored or used. You may select a single cabinet, or a lab where you work, or a building or floor with all the labs within.
Chem Name	The description of the inventory item. Select one filter: Is – the chemical name exactly matches the specified text string Contains – the chemical name includes the specified text string Starts with – the chemical name begins with the specified text string Ends with – the chemical name ends with the specified text string
CAS #	The Chemical Abstract Services registry number; enter the value with or without the dashes, e.g., 50000 or 50-00-0
PI/User	The individual user associated with the inventory items, or the user and department with which the user is affiliated.
Department	The specific group associated with the inventory items. You may select a single sub-group such as the 'Jones Group' or a higher level group such as Chemistry that may have one or more subgroups.

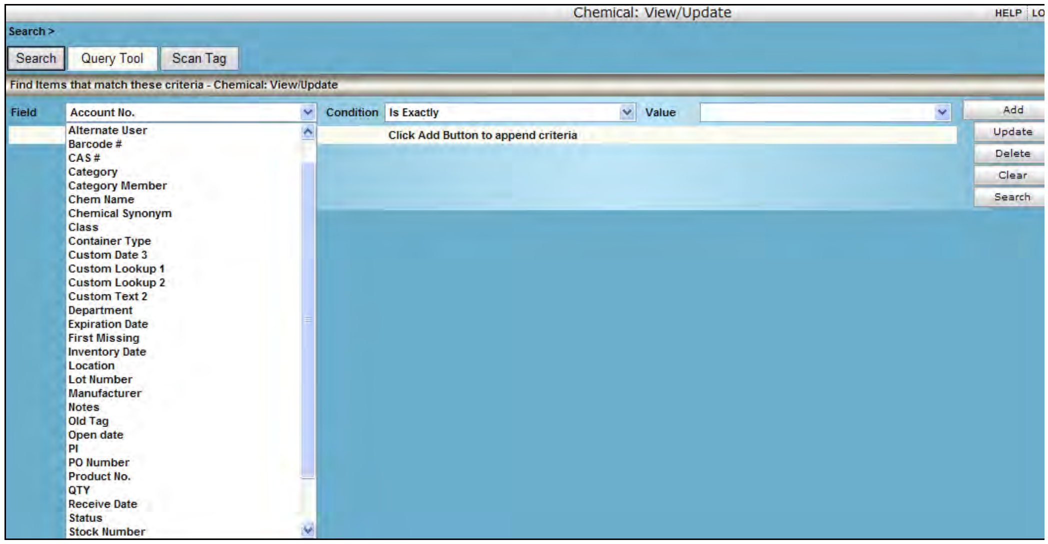
1. **To search**, enter one or more selection parameters (e.g., item barcode #, CAS, user or location, chemical name) and click **Search** or just click **Search** to view all records. The order of the displayed columns may vary. The magnifying glass indicates that the user does not have any edit rights; edit rights are indicated by a check box.



Search Results in View / Update

View/Update (continued)
Using Search, Query Tool or ScanTag (continued)

2. **To query**, click on the Query Tool tab for more options such as formula, lot number, synonym, or expiration date. Define your criterion and click **Add**; enter one or more criteria, then click **Search**.



Query Tools Common to All Modules

3. **To use Scan Tag,** click the **Scan Tag** tab. This option allows you to extract a group of records that may not share a common value that can be used as a criterion in the Search or Query tools. For example, if you have a list of tags that have been pulled from containers before their disposal, Scan Tag provides a quick way to enter all the tag numbers and process the entire batch of records in one transaction.

   a. Click the **Scan Tag** button to enter a tag number.
   b. Enter the tag number and press **<Enter>** or click **Add**. An entry will display in the table below, and the cursor will return to the entry field ready for the next item.
   c. If you enter a tag number for an item that has already been disposed, the message 'Tag xxxxxx was disposed on [date].' Will display.
   d. If you scan/enter a barcode in error, highlight the record by clicking **Select** and then click **Delete** to remove it from the list. The Delete button does NOT remove records from active inventory.
   e. Click **Process** to display the records on the Results Grid.

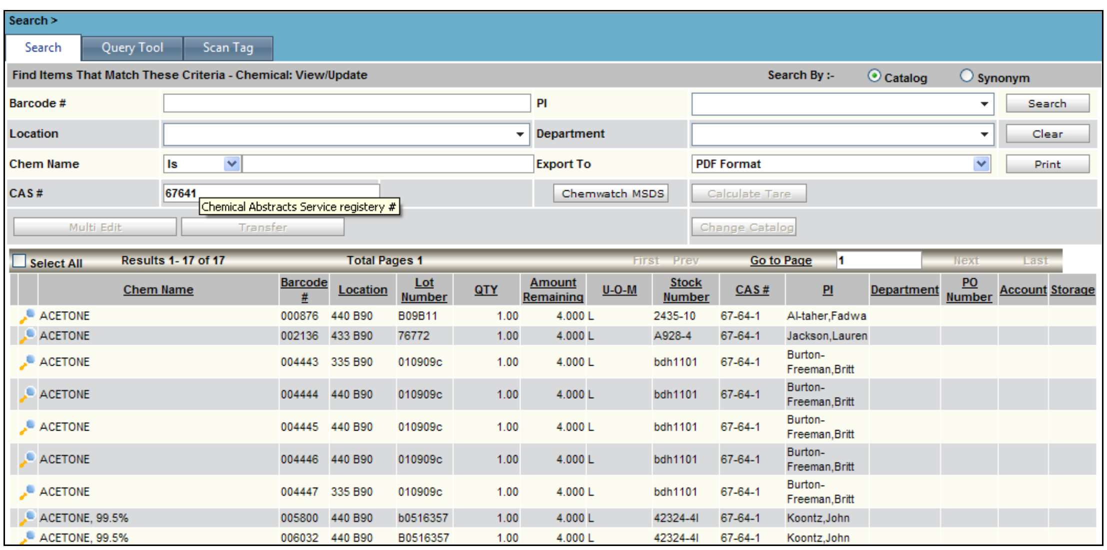
Scan Tags with 3 Items Added

View/Update (continued)

The Results Grid Whether you use the Search, Query Tool, or ScanTag option to select records for updating or reporting, the selected records will display in the Results Grid as shown below. These records are immediately available for editing (if you have permission to edit), or for printing, or exporting in spreadsheet or other data formats. For more detailed reports or to include calculations, talk to your Site Administrator about a custom report.

Your options at the Results Grid include:

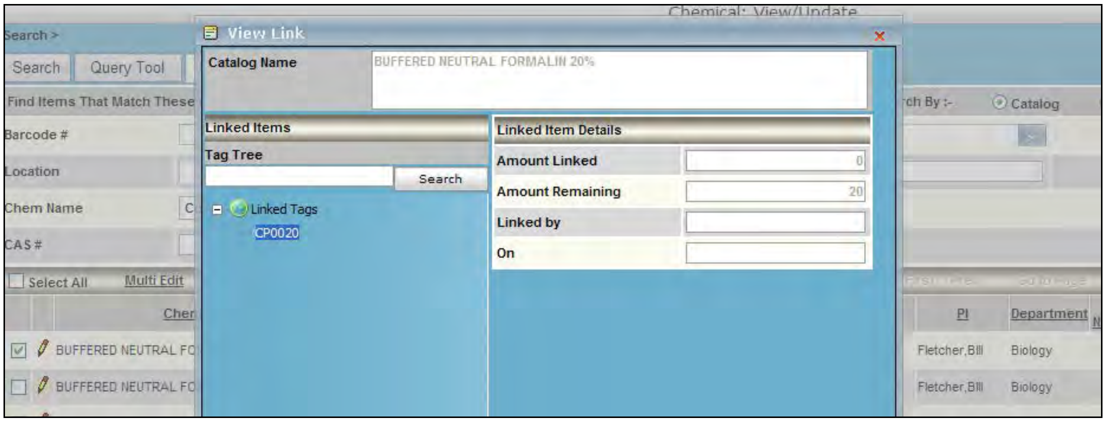
Options	Your Action
Export	To export the entire results list, select the output format (PDF Format or spreadsheet) after the words 'Export to' and click **Print**. To export only a portion of the results, modify your search or query if possible. Otherwise, export to a spreadsheet and remove unwanted rows.
View Details	Click the magnifying glass to view details of a single record. (See Viewing Details below.) You will be able to view but not edit the details associated with each container. If you have Edit rights, a pencil will display; click the pencil to edit the details associated with each container.
Show All	Click the **Show All** button to scroll through all items if the results are shown on multiple pages.
Chem Watch	Select one record by clicking the box to the left and click **ChemWatch MSDS** to view your site's version of the data sheet. This option is available only to sites with a ChemWatch subscription.
View Link	If linking is enabled, select one record and click **View Link** to view the parent or child record(s) as appropriate.



Query Results with View Options for Selected Records

View/Update (continued)

View Linked Records To view linked records, select the Parent or Child record in the Results Grid and click **View Link**. You can have multiple children under a single parent. The following image shows the parent-child relationship tree. It also displays the linked amount.



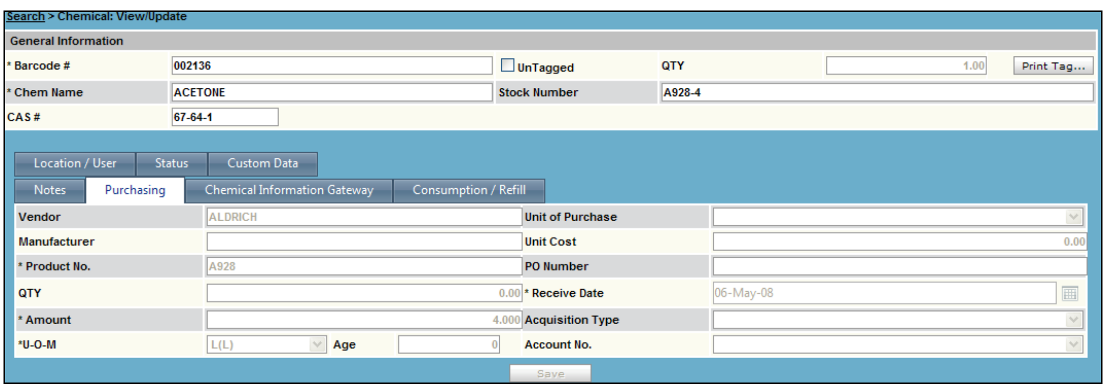
Linked Records.

VIEWING DETAILS

To view details of a single record, click the view icon (magnifying glass) next to the row to display the Inventory Item tab pages.

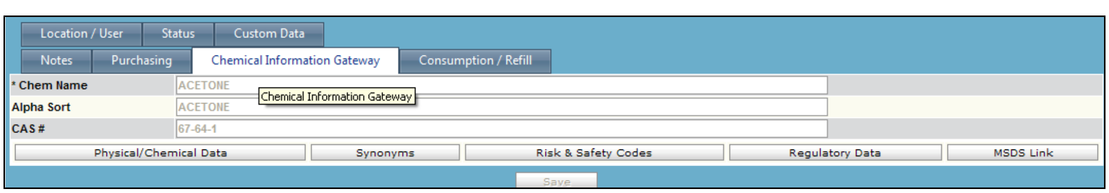
Returning to the Grid Click the Search link above the General Information box displayed when you view the details of a single container record.

Purchasing Tab The Purchasing tab page includes information about the product, the original amount and unit of measure, as well as information about the purchase itself.



Purchasing Detail for Inventory Item

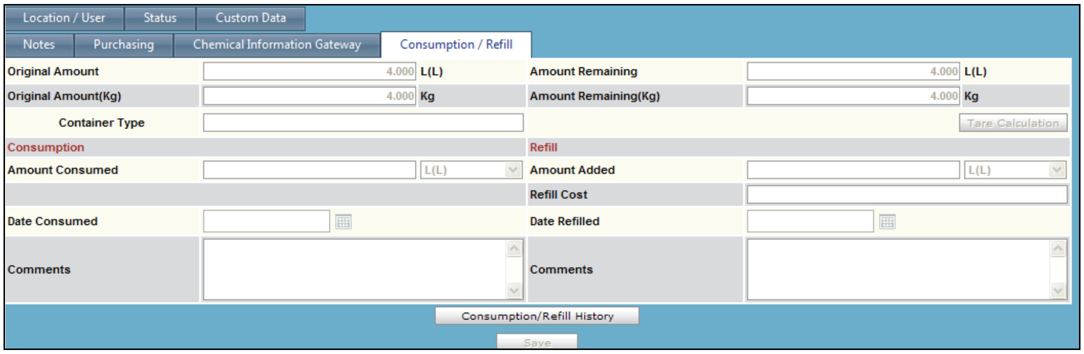
Chemical Information Gateway Tab Use the Chemical Information Gateway tab page to view information about the substance. The information in the Gateway pertains to all substances that share the CAS# or if no CAS# is available, all substances that share the product number and vendor. Detailed instructions for use of the Gateway are contained in section 4 of this User Guide.



Chemical Information Gateway in Inventory Item Detail

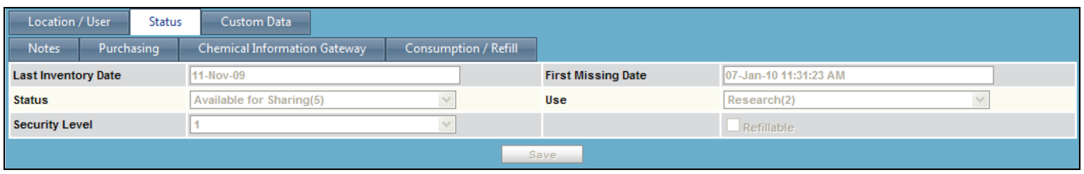
View/Update (continued)

Consumption / Refill Tab Use the Consumption / Refill tab page to view information about the amount remaining in the container and its consumption history.



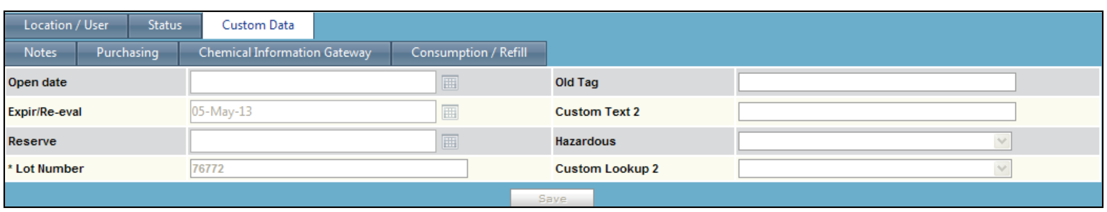
Consumption / Refill for Inventory Item

Status Tab Use the Status tab page to view information about the status or use of the substance, including the last inventory date, or the date that the item was defined as 'missing', that is, not located during a physical inventory.



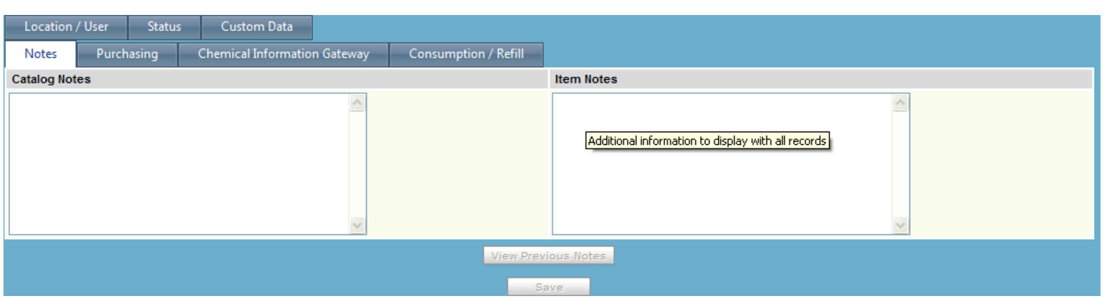
Status for Inventory Item

Custom Data Tab Use the Custom Data tab page to view the custom text, custom date, and custom lookup values associated with the container record.



Custom Data for Inventory Item

Notes Tab Use the Notes tab to view notes associated with the container record and to view catalog notes (if any) about the substance. The tab label changes to 'View Notes' if notes have been recorded either with the catalog or the container. If other notes have been recorded for the item, click **View Previous Notes** to review those entries.



Notes for Inventory Item

6. DOWNLOAD RECONCILE

Download Reconcile

Use the Download Reconcile menu to import, review, edit and process data collected in the field using portable data collectors. In the Enterprise version, all data files must be downloaded from the data collector prior to using this function. You must use the Vertere-supplied software for these devices in order to transfer the collected data to the Inventory Manager. Refer to Section 8 of this User Guide for complete instructions for using these devices and for viewing, editing, or downloading raw data to the database.

Detailed instructions for collecting and downloading data are provided in following sections:

- Using the MC3090 – Section 8
- Using the SPT1800 and other Palm devices – Section 8A
- Using the MC50 – Section 8B

For inventory transactions that take place in the field, the user needs to be able to record information in a portable data collector or mobile computer, and transmit data to the server via batch file transfer or wireless communication. All data collectors used with the Enterprise version include these field transactions:

- Relocate chemicals
- Dispose chemicals
- Collect physical inventory data

Some older units also allow users to complete the following transactions:

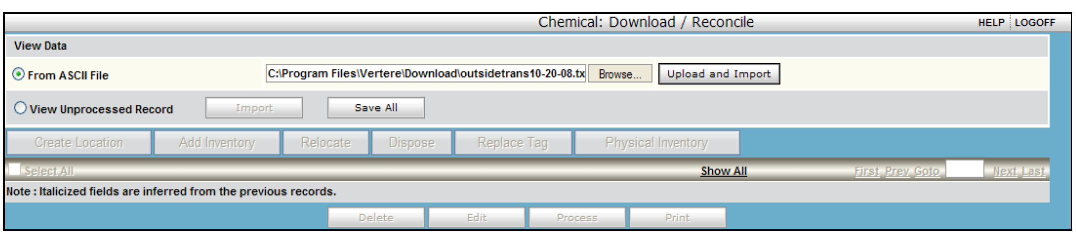
- Replace tag
- Add locations

Although some units have an 'Add inventory' function installed, we do not recommend use of this method; too many data elements need to be 'looked up' for accurate data entry.

Note: To use Download/Reconcile the user Role must include Download/Reconcile rights.

To import and view data you have collected, choose one of these methods:

1. Import from an ASCII File that has already been downloaded from the device and saved with a unique file name.
2. Import saved records previously imported and viewed but not processed. These records have been saved in suspense tables by using the Save All option.



Chemical Download / Import Options

You can work with downloaded data immediately after you have downloaded and saved the file, or you can import the file at a later time.

You can view and edit the raw data file before you import it. For example, you might need to change the stored date value, or change or delete a record. See the appropriate Section 8 text for a full explanation of the raw file formats. When you click Browse, locate the file and right click on it. Select **Open** to view and/or edit the raw data. Be sure to save any edits you make.

Viewing Imported Data

The data you have collected will be displayed in the appropriate tab page of the Download / Reconcile window shown above: Create Location, Add Inventory, Relocate, Dispose, Replace Tag, or Physical inventory. Only tab pages that have records will display.

Data Source	Definition
ASCII (or .TXT) File	View and process records that have been downloaded previously. Use the **Browse** button to view saved files, select the file and click **Open**. Files may have a .txt or .asc extension.
View Unprocessed Records	Data that has been downloaded, viewed, and saved (using Save All) into suspense tables without processing.
Upload and Import	Click **Upload and Import** to transfer the files to the web server from your local workstation and display them for your further processing.

When a file is imported, the system checks the date values contained in the file. If the transactions dates are in a prior year, the system will display the following message:

Date stored in download file may be inaccurate. Would you like to change it?

Click **Yes** to change the date value or **No** to accept the dates stored in the file. If you select **Yes**, enter the scanning date that will apply to all records in the raw file.

The data collected in the handheld will take one to five minutes to import depending upon the number of records in the file. Records will be grouped by transactions type. You will process each transaction type separately, one by one.

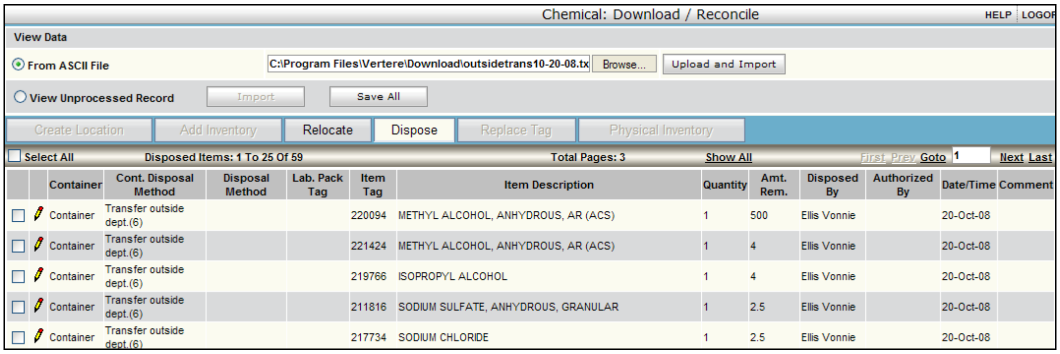
If you terminate the process before all transactions have been processed or before you use the **Save All** feature, you will need to import the data again. All data stored in the file will be displayed each time you import the file. You do not need to reprocess transactions that have already been completed. If you do not know if a transaction has been processed, you may re-process the file. **Caution**: If you process Relocate records, consider the time that has elapsed. Some of the included records may have been transferred or disposed after you first processed the file.

Use Tab Page	To . . .
Create Location	Add new child locations with tag and description detail. Note: You cannot create a primary parent location with the data collectors.
Add Inventory	Add new items to the inventory (not a recommended use because of the numerous tabled values required)
Relocate	Change the location or user associated with one or more inventory items.
Dispose	Remove inventory items from the active inventory.
Replace Tag	Change the barcode number on an item and update all tables with the new value.
Physical Inventory	Audit the location of inventory items.

Viewing Imported Data (continued)

IMPORTANT: Records are imported in the same order in which they are created. Field values that are displayed in italics are inferred from the first record. In the example shown below, the data collector entered the disposed by value one time during a procedure, and then scanned 5 containers. Rescanning the user tag is not required so the last 4 records 'infer' the user from the first record.

To correct an invalid inferred value, correct the *first* record in the set—the record that is not shown in italics.

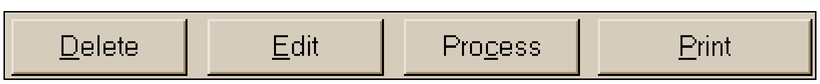


Inferred User in Disposal Records

Each tab page will display the following:

- Select All – the checkbox that will mark all records on a grid page within a single function for the processing you select: Delete or Process.
- Number of items in the selected function grid
- Number of pages
- Show All button to display all records on the grid so that using select all will mark all records rather than those on only one page

Each tab page has buttons similar to the following:



Tab Page Options

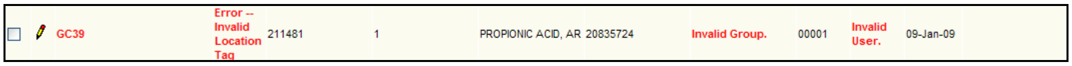
Review the records in an individual tab page you import, highlight one or more records and click on the appropriate button. Use the buttons as follows:

Viewing Imported Data (continued)

Prompt	Your Action
Delete	Select one or more records and click **Delete** to remove the record(s) from any of the tab pages in Download / Reconcile. Deleting a record removes it from the displayed data or suspense files; it does not remove the main location or inventory record from the database, and it does not remove the records from the raw file. A decision window will display to confirm deletion choice. If you import the raw data file (.asc or .txt) file a second time, the records will display again unless you edit the raw file.
Edit	Highlight a record and click the **Edit** icon. The displayed data entry form will depend upon the function.
Process	Use **Process** to commit the changes identified on a single tab page (for example, on the 'Relocate' tag page). The system *will not* process records that have identified errors. When you process records on a tab page, inventory records are updated immediately. The system will return a message that has a count of records that are processed and the records that are not processed because they contain errors. **Note**: In **Physical Inventory** tab page, use the **Update** button to update records in the physical inventory process. **Update** moves valid records to the physical inventory table for comparison with your inventory process criteria.
Print	Print or store to a spreadsheet the records displayed on the tab page.

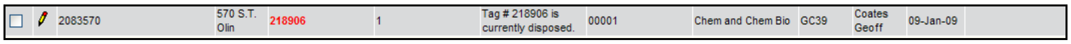
Editing in Download / Reconcile

Records that contain data errors will display with the incorrect values shown in red and an explanation of the error in the Item Description column.



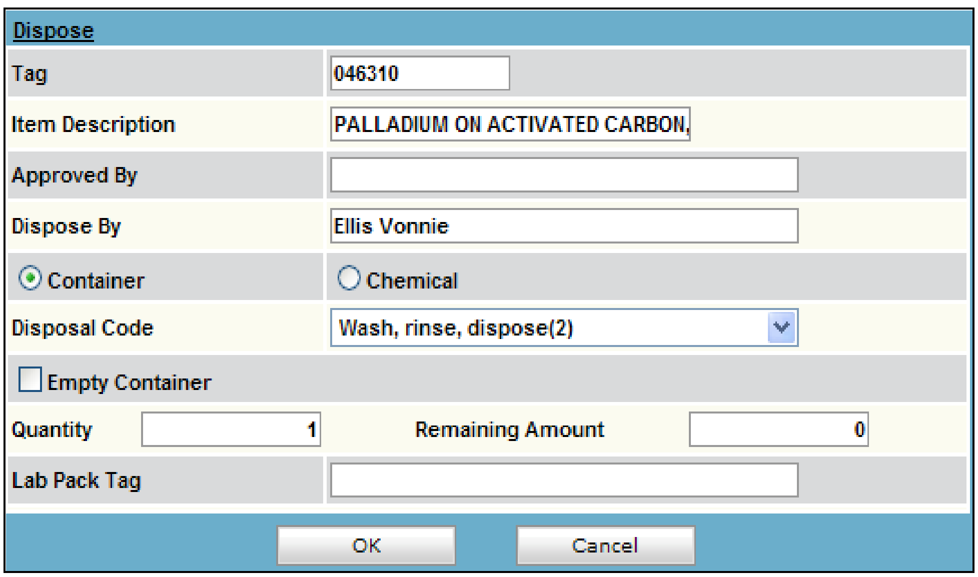
Errors Highlighted in Red Text

More information about the error may display in the Comment field, right-most column.



Detailed Error Information

To correct an invalid data element, click on the edit pencil or highlight the row and click Edit. In a Location or User field, click in the field and select the correct value from the tree or from a pull down table as shown in the following example. Valid values will display when you click on the field. In the following example, the user clicked in the Approved By field. You cannot add a value to these tables 'on the fly' as you can in the Add mode.



Correcting a Value in Disposal

If you correct the first record in a series that share an invalid value, the correction will be inferred by the following records in a 'trickle down' manner.

Create Location Tab

Use the Create Location tab page to add locations to your database. This function will NOT add root locations such as a site, but will allow you to define rooms within a building and lower level locations with the room.

These changes will be committed immediately to the Location Tree.

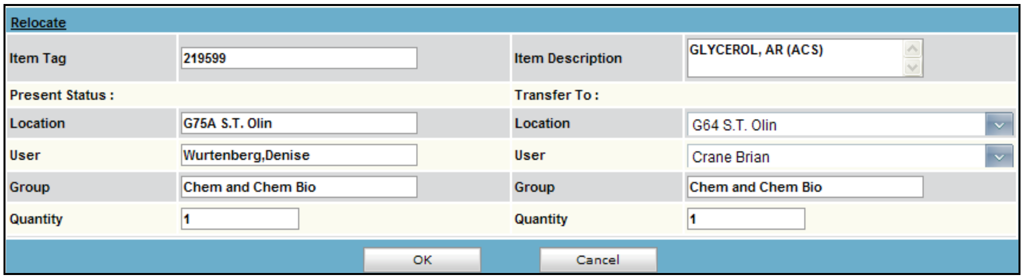
Add Tab

Adding new container records to your database with the data collectors is not recommended and is not supported in most vertére data collection software.

The add process is facilitated by access to the lookup tables contained in your database, for example, the catalog, locations, and user group listings.

Relocate Tab (Transfer)

Use the Relocate Tab to record a change in location or user.



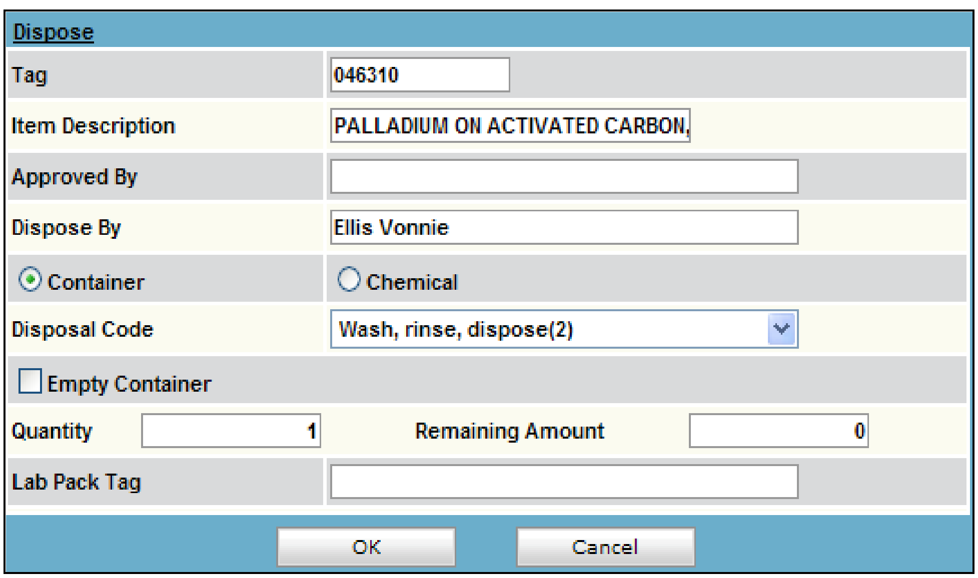
Correcting an Invalid Location Field in Relocate/Transfer

Dispose Tab

The Dispose function will remove items from your active inventory and record them in the disposed record set. [Records disposed through the Download / Reconcile function can be restored by using the Inventory / Restore menu option.]

View items in the Dispose tab page. If no errors are found, click **Process** to dispose one or more inventory items.

If errors are noted in a record, select the record and click **Edit**, or click on the edit icon to display the Dispose edit form as shown below.

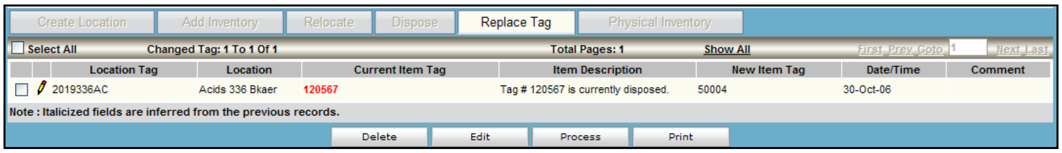


Editing Disposal Data

Replace Tag Tab

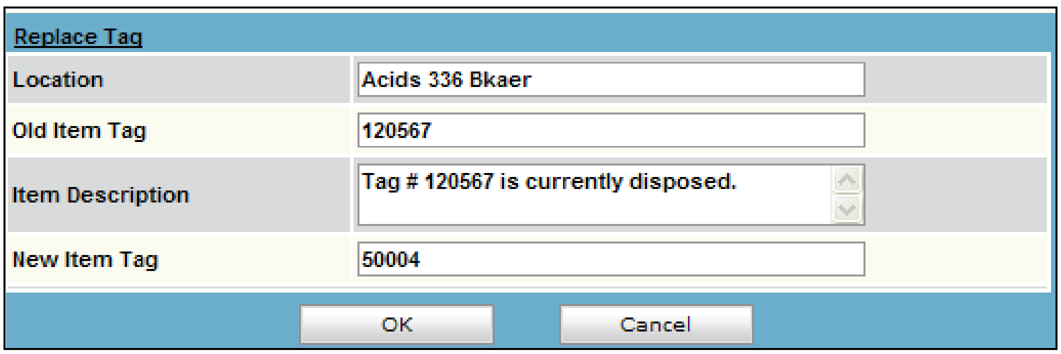
The Replace Tag function allows you to assign a new tag value to an item while you are in the field. For example, if you find a container with a damaged label, you may place a new label on the item.

To use this feature you must have pre-printed tags with you as you work in the chemical storage areas. [Of necessity, preprinted tags will have only the tag value.] If you are printing tags on demand, you may prefer to return to the printing station and reprint the tag. [Use View/Update, select the record for editing, and click on the Print Tag button in the top right of the main detail form.]



Replace Tag with Identified Error Message

If you edit the record, the edit form will appear as shown below.

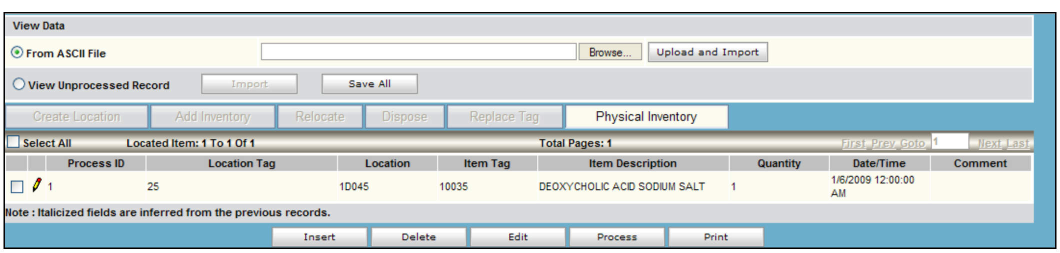


Edit in the Replace Tag Function

When you click **Process** on the Replace Tag page, the replace tag function will immediately update the defined tag values; the change is recorded in the Audit table.

Physical Inventory Tab

For complete instructions on processing physical inventory data files, review Section 7 and Appendix A.

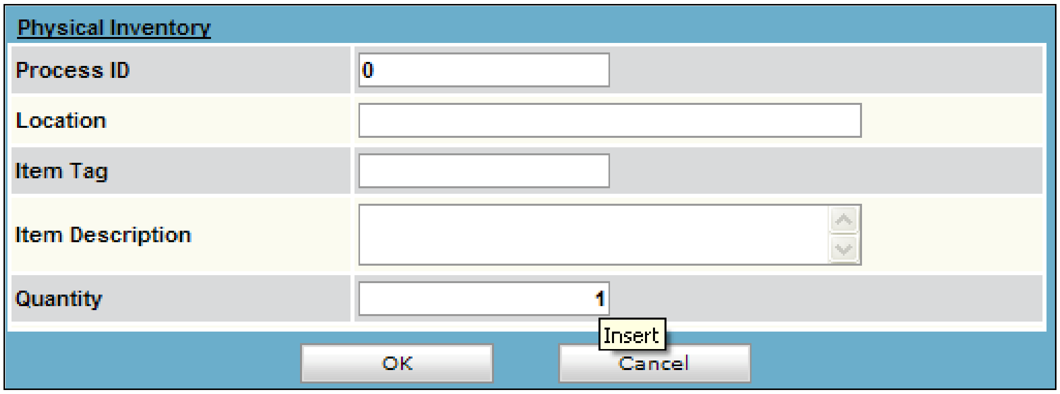


Physical Inventory Function

You can edit any value that has been recorded incorrectly by clicking on the edit icon.

Insert Physical Inventory Record

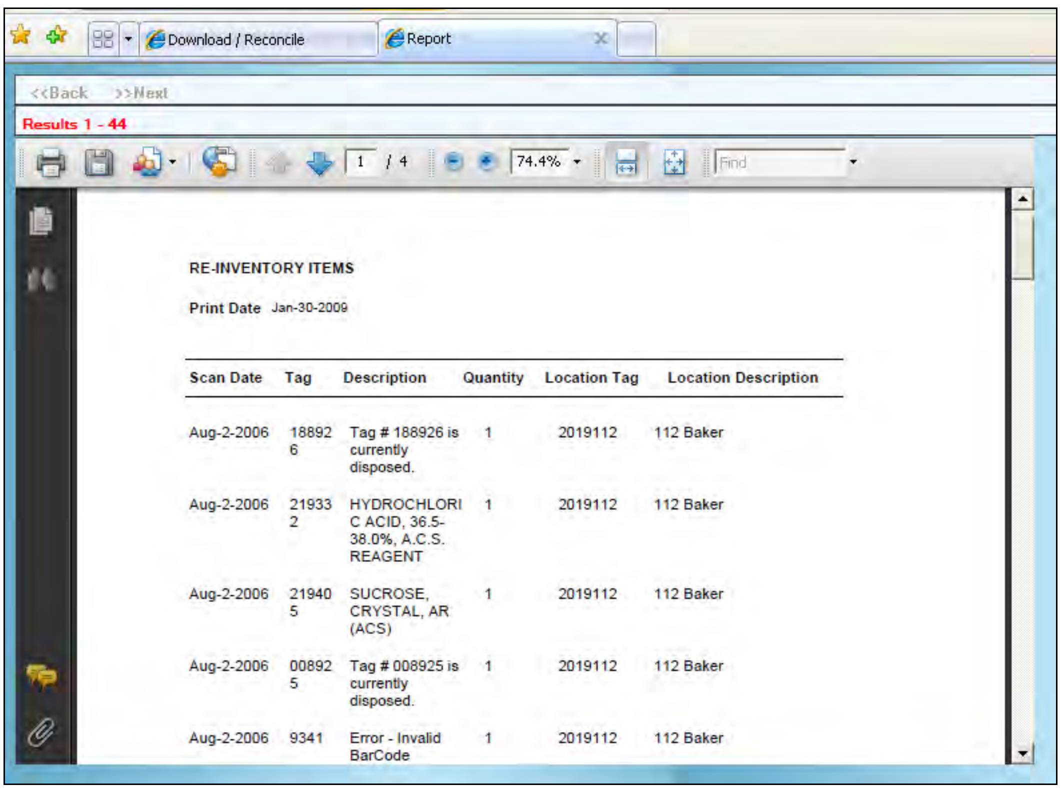
If you use the 'Insert' option, the data entry form will display as shown below; you must have the required information to use the Insert function.



Insert a Physical Inventory Record

Printing

Use the Print button to print the values displayed on any of the function grids either before processing to print all records in the download or after processing to print a list of those records that did not process because an of error condition.



Sample Printout from Download Reconcile

Use the report icons (from left to right) to print the report, save it, share it with other users, or save it to a PDF document. Use the up and down arrows to scroll through the pages n the report, the plus and minus icons to increase or decrease the size of display. The last two icons allow you to scroll through the report using the scroll bar or restore the report to paged layout. To close the report, click the **x** on the IE Report tab.

7. PHYSICAL INVENTORY

About Physical Inventory

The term 'Physical Inventory' refers to the process of comparing the location and container records in your database with the actual locations and container records.

Use the Physical Inventory menu to define criteria for an audit of your inventory records, reconcile exceptions, and complete the process by updating your inventory records with the inventory date, the inventoried location, and if necessary, a first missing date for items that cannot be located.

The purposes of a physical inventory are

- to permit users to inventory items defined by one or more filters: location, group, manufacturer, description, etc.,
- to validate that the items listed in the inventory system are still on site,
- to identify any items that are missing,
- to identify items that are still in use that have been defined as disposed,
- to identify the current location, and
- to identify items that have changed location.

Using barcode readers, the inventory team will record the following information:

- Date and time (Handheld System date and time) an item is scanned
- User Tag – the identifier for the person collecting the data
- Process ID – the number that identifies the specific inventory filters assigned to the physical process (sys_rein_process.invtry_id)
- Location Tag – where the item is found and scanned
- Item Tag – the barcode number on the inventory item

To prepare for a physical inventory, the manager must complete these steps:

1. define the criteria for an inventory process (Physical Inventory);
2. provide a charged barcode reader;
3. verify the date and time in the reader (this is a time-sensitive operation, correct date and time are critical);
4. train the users who will conduct the inventory; only three data elements are required, so training shouldn't be time consuming;
5. provide directions for data collection, including the process criteria so the user knows what are the items of interest and where they should be located. Provide a printed listing if appropriate; the number of items meeting the process criteria may determine if printing is feasible – or useful;
6. train users when and how to download (we recommend downloading every four hours);
7. conduct a practice process with a small record set; complete the entire procedure one time so that all users know the steps.

The team will collect the information in the field and return the barcode readers to the administrator who will have the data downloaded for viewing and editing. After the data set is validated, the information will be used to update the records associated with the physical inventory process.

In the validation process IM identifies inventory exceptions by comparing the collected data to the active inventory. At the user's discretion, physical inventory records can be edited in the Download Reconcile screen. The user may, for example, change the location to the original location, add new items manually to the physical inventory list, or delete records from the process.

Physical Inventory (continued)

In the Physical Inventory window, all records associated with a specific inventory process ID will be displayed with that record group—even if the records do not match the criteria defined for the process.

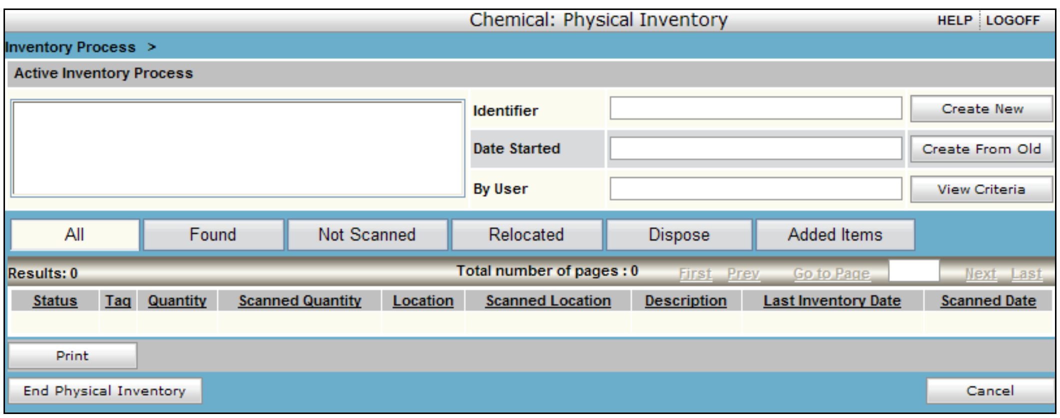
The problems the physical inventory process anticipates are:

1. Time delays and the resultant changes in location and or active status. For example, items may be disposed after they are included in a process or be disposed after they are scanned but before the records are downloaded and reconciled.
2. Additions to the system from the PC or the handheld – new items must not be counted as "missing"
3. Subsequent transfers – after an item is found, downloaded, reconciled, it may be moved and then scanned again. It must be processed again in its new location.

Inclusion of the same item in more than one inventory process – to help with processing, all records that meet the criteria are stored in the physical inventory table with the starting date and time, and starting location. The scanned date and time can be compared to the starting date and time or if an item is scanned more than one time, scanned dates and times can be compared to each other.

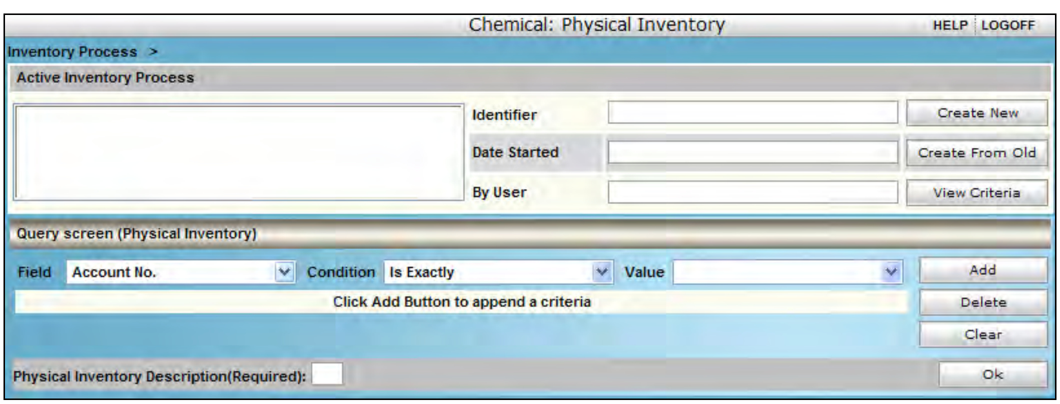
Start Physical Inventory

To start a physical inventory, the authorized user goes to the Chemical menu and selects the **Physical Inventory** menu option. The following screen will display.



Physical Inventory Process Screen with Status Tabs

To define an inventory process, click **Create New.** At the Physical Inventory Criteria screen shown below, select one or more fields and values. For example, the criteria may include "All items located in location 2B". Click **Add** to save each criterion as it is defined.

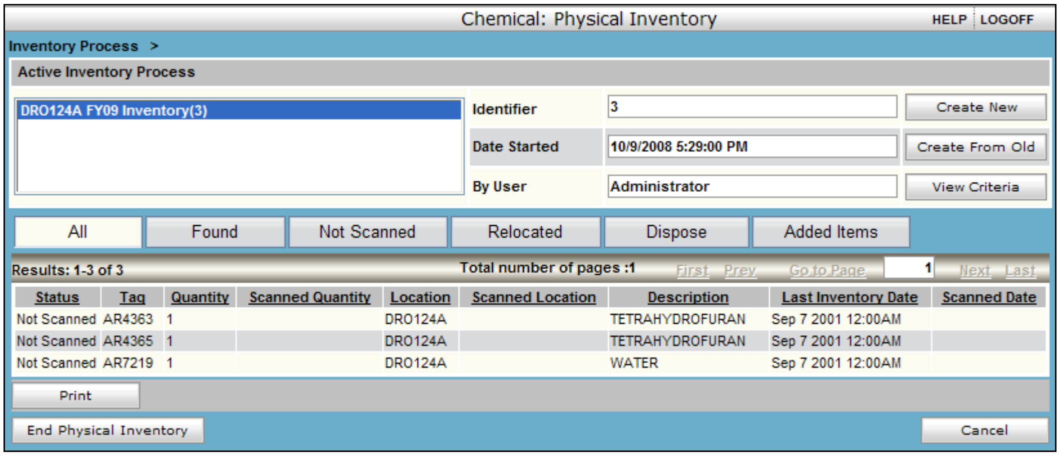


Define Physical Inventory Process Screen

Start Physical Inventory (continued)

Enter an identifying description for the inventory and press **[Tab]** to enable the OK button. Click **OK** and the system will return a process ID.

To view the items that meet the process criteria, highlight the process in the Active Inventory Processes box. All items that meet the criteria will be displayed on the All tab page.



Physical Inventory Process Screen

The user can then print a report of all items that meet the criteria. Initially all of those items will have a status of 'Not Scanned.' As items are located and scanned, and as the files are imported in the Download/Reconcile process, the status will change.

Multiple Processes

Multiple inventory processes may be active at any one time. Click on the process description in the Active Inventory Process to display records for that process. You may switch between processes.

Cancel or End Inventory Process

At the bottom of the Physical Inventory Process screen shown above, two options are displayed, End Physical Inventory and Cancel. Do not confuse these options.

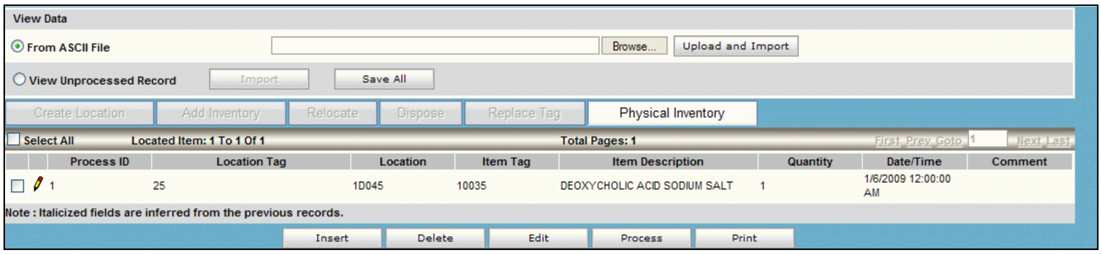
Cancel – will terminate the process without making any changes to your inventory records. None of the data associated with the process will be saved. Only use this option when the process you have defined is not what you expected.

End Physical Inventory – will close the inventory process after updating the inventory date and location of any items you have scanned and updating the first missing date of any items you have not scanned.

Download/ Reconcile Physical Inventory Tab

Data you collect during a physical inventory will display first on the Download/Reconcile page where you may correct errors such as an invalid Process ID, location, or Item Tag. Scroll to the right to view the scanned date and time and any comments that define the error condition.

Delete one or more rows by placing a checkmark in the select box and clicking **Delete**, or correct the location or tag value by double clicking on a row or highlighting a row and clicking **Edit**.



Editing Options on Physical Inventory Tab Page of Download/Reconcile

Click **Process** to transfer the records to the Physical Inventory tables. Then use the Physical Inventory menu where you will be able to view the records with the expected results for the process and reconcile the scanned data to the expected data files.

Update will NOT cause any changes to your container records. All edits that result from physical inventory processes occur in the Physical Inventory menu.

Download/ Reconcile - Insert Tags on Physical Inventory Tab

Note that the Physical Inventory tab page allows you to insert a record into the reinventory file.

To manually enter information about a located item, you must have at least one record in an import file. One strategy to use is to create a 'dummy' raw data file that will be permanently stored in the Unprocessed Records group. That record should have an invalid process ID or an invalid tag number so that it will never be processed.

Import the dummy record. You will then be able to use the Insert button to manually enter the process ID, location, and tag values for items that are located or reported to you. The dummy text file would look like this:

XA05,UNnone,HU456,HD07/05/2006 15:24,EP5,EA002101,EB002102,EC1,

XA05=physical inventory, UN is the unit number of the scanner (none is OK), HU is the user tag value (blank is ok), HD is the date and time. Those values must be included in your 'dummy' file. EP is the process ID, EA is the location tag, EB is the container tag, and EC is the quantity (which will default to 1). Note the file must end with a comma.

Processing Physical Inventory Data

To view records that have been passed to the Physical Inventory function, go to the Physical Inventory menu and highlight the process of interest. The All tab will show all records associated with the process, located or not.

All – all items that meet the process criteria

Found – the items have been scanned or manually entered into the Download/Reconcile Physical Inventory form

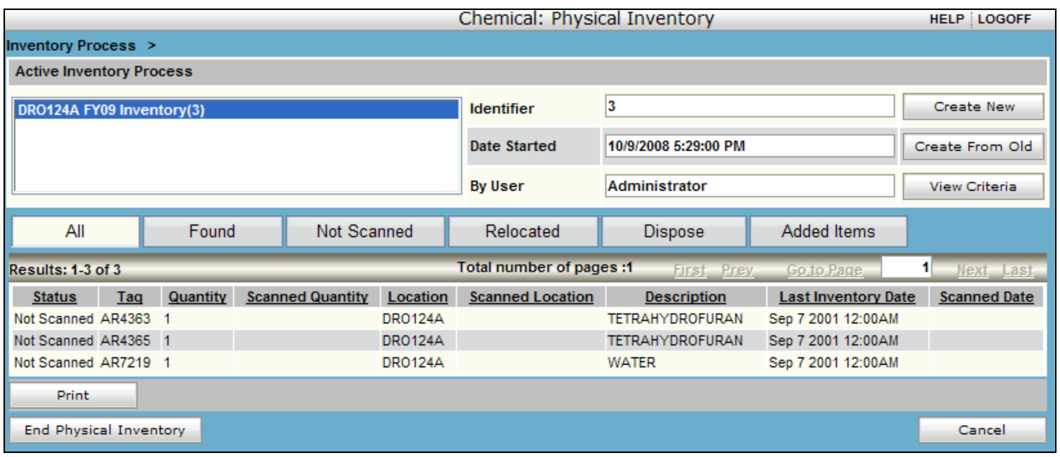
- Found and Not Processed – the inventory item has not yet been updated with the inventory date and location
- Found and Processed – the last inventory date and the current location have been updated for the inventory item

Not Scanned – the item has not been located

Relocated – the item's current location is different than its recorded location when the inventory process began

Disposed – the item was scanned AFTER is was recorded as disposed

Added (1) the item was added to the inventory after the process began and it meets the criteria for the inventory process, or (2) the item was in the inventory when the process began and was scanned in this process even though the item does not meet the inventory process criteria

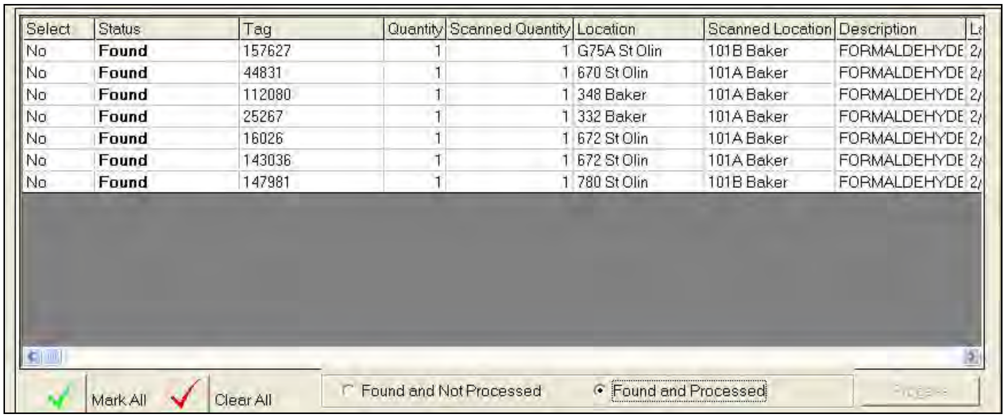


Sample of All Tab Page in Physical Inventory

Review the detailed instructions provided in Appendix A, the PowerPoint presentation 'Physical Inventory with the Vertere Inventory Manager.'

Terminating the Physical Inventory Process

When you have located and processed all possible records, it is time to end the inventory process.



Select	Status	Tag	Quantity	Scanned Quantity	Location	Scanned Location	Description	L
No	**Found**	157627	1	1	G75A St Olin	101B Baker	FORMALDEHYDE	2/
No	**Found**	44831	1	1	670 St Olin	101A Baker	FORMALDEHYDE	2/
No	**Found**	112080	1	1	348 Baker	101A Baker	FORMALDEHYDE	2/
No	**Found**	25267	1	1	332 Baker	101A Baker	FORMALDEHYDE	2/
No	**Found**	16026	1	1	672 St Olin	101A Baker	FORMALDEHYDE	2/
No	**Found**	143036	1	1	672 St Olin	101A Baker	FORMALDEHYDE	2/
No	**Found**	147981	1	1	780 St Olin	101B Baker	FORMALDEHYDE	2/

Found Items with Starting and Scanned Locations

To end the process, highlight the process in the Active Inventory Processes box.

Click **End Physical Inventory** button on the bottom left of the Found tab page.

You will be prompted to confirm that you truly want to terminate the process. Terminating causes three results:

1. The inventory date and location of all items identified as ‘Found and Not Processed’ will be updated to the values shown in the Found grid.

2. The first missing date of all items identified as ‘Not Scanned’ will be updated with the current date and time. You will have a record of all items that could not be located.

3. The process will be terminated and the process will be removed from the Active Inventory Processes box.

8. Using the Symbol MC3090 and MC3190

Overview

This document provides instructions for using the Symbol MC 3090 and related portable data collectors such as the MC3190 to gather information remotely for importing into the Chemical Module of the Enterprise Vertere Inventory Manager.

Instructions for use of Symbol SPT1500, SPT1550, SPT1700, and SPT1800 data collectors that use Palm OS are provided in a separate section.

Data entry from other barcode readers such as Symbol Cobra LS 1902T that attach to the local workstation to simulate keyboard entry require no software changes. These devices are self-decoding in that they can be implemented to read one or more barcode symbologies. These devices use triggered laser scanners.

Symbol 3090 Keyboard Layout and Use

The Symbol 3090 has a 4- key layout and a touch screen with attached stylus. The touch screen will be used mostly in the Windows environment to get into and out of the Vertere Inventory Manager program; within the program, users will use the keypad or scan button to enter data.

Use the table that follows to locate the special keys required to use the data collection software in a 48-key configuration. Not all of these fields are required, but it is helpful to users to know the commands.

Key	**Function**
[❑]	Used to turn on/turn off Symbol unit.
Yellow Scan Button	Pressing this key turns on the laser beam in order to scan a barcode.
[❑] [1] [9]	WARNING: This cold boot function deletes collected data files.
[⦿] [7] [9]	Warm boot function. Used to exit out of Windows CE without loss of data. Use the stylus to press the On/Off button, then hold down the [7] and [9] keys simultaneously. Release the On/Off button. Keep holding the [7] and [9] until the purple splash screen appears. After performing a warm boot, the unit will display the MC 30XX Demo screen. Tap the **Exit** icon to get to the Windows CE desktop.

Key	**Function**
[FUNC] [7]	**Return to main menu**
[SHF]	Used for displaying uppercase characters.
[BKSP]	Deletes last key entered.
[SHIFT] [BKSP]	Deletes going forward.
[ENT]	Moves to next input screen.
[FUNC] [N]	Used to make screen brighter.
[FUNC] [S]	Used to make the screen darker.
[FUNC] [R]	Makes keyboard tones louder.
[FUNC] [W]	Makes keyboard tones softer.
[FUNC] [O]	Used to display a minus sign (-)
[FUNC] [P]	Used to display an equals sign (=)
[FUNC] [Q]	Used to display the division operator (/).
[FUNC] [T]	Used to display the square open bracket ([).
[FUNC] [U]	Used the display the square closed bracket (]).
[FUNC] [V]	Used to display a semicolon (;)
[FUNC] [X]	Used to display an apostrophe (‘)
[FUNC] [Y]	Used to display an open single quote (`)
[FUNC] [Z]	Used to display an asterisk (*)
[SHIFT] [.]	Used to display a greater than sign (>)
[SHIFT] [1]	Used to display an exclamation sign (!)
[SHIFT] [2]	Used to display the ‘at’ sign (@)
[SHIFT] [3]	Used to display the pound sign (#)
[SHIFT] [4]	Used to display a dollar sign ($)
[SHIFT] [5]	Used to display percentage (%)
[SHIFT] [6]	Used to display the exponential sign (^)
[SHIFT] [7]	Used to display an ampersand (&)
[SHIFT] [8]	Used to display an asterisk (*)
[SHIFT] [9]	Used to display open parenthesis (
[SHIFT] [0]	Used to display closed parenthesis)

INSTALLATION INSTRUCTIONS

Installing Software in Symbol Units

Vertere delivers the Symbol MC3090 with the Vertere Inventory Manager Chemical Module program installed. Use these instructions if you purchase a unit from another source or if the software is deleted.

WARNING:
The Symbol must be fully charged before you attempt these procedures. The Symbol has a built in power saver which will automatically switch the unit off if left unattended for a period of time. Press any key on the keypad to restore power and screen display.

Required Equipment

Verify that you have the following equipment:

- fully charged Symbol unit,
- the Symbol cradle
- USB cable
- Desktop PC with USB port
- Access to the HANDHELD directory delivered with Vertere Inventory Manager, usually stored in C:\Program Files\Vertere.

Some of the information that will be recorded in the data collection device can be printed in a ‘booklet’ in barcoded format. (See System / Tags for instructions on using the Booklet option.) This data may include, but not be limited to, locations, user/groups, and commonly used system codes (disposal methods) that are defined at the PC.

INSTALLATION INSTRUCTIONS

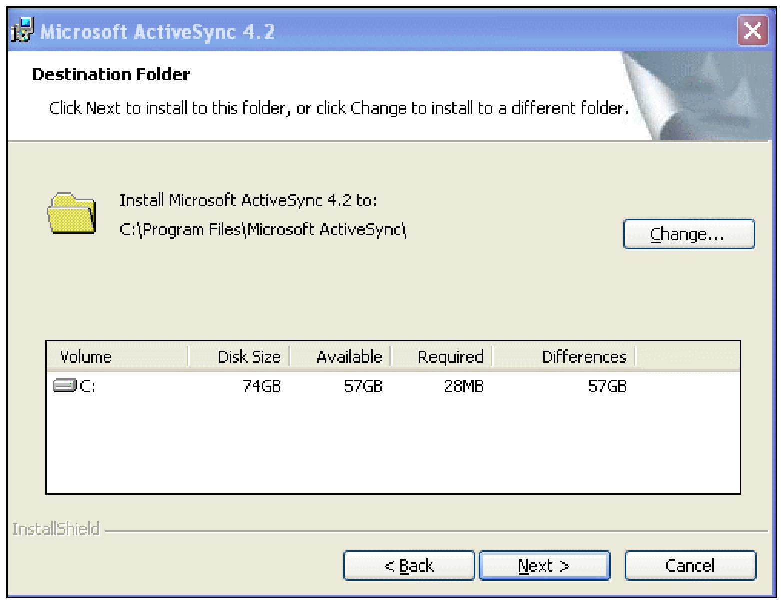
The following section describes the steps required to load the data collection program on the Symbol unit.

Installing Microsoft ActiveSync on your PC

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Insert the CD that was delivered with your Symbol unit into your computer’s CD-ROM drive.</td></tr>
<tr><td>2</td><td>Click on Start then Run.

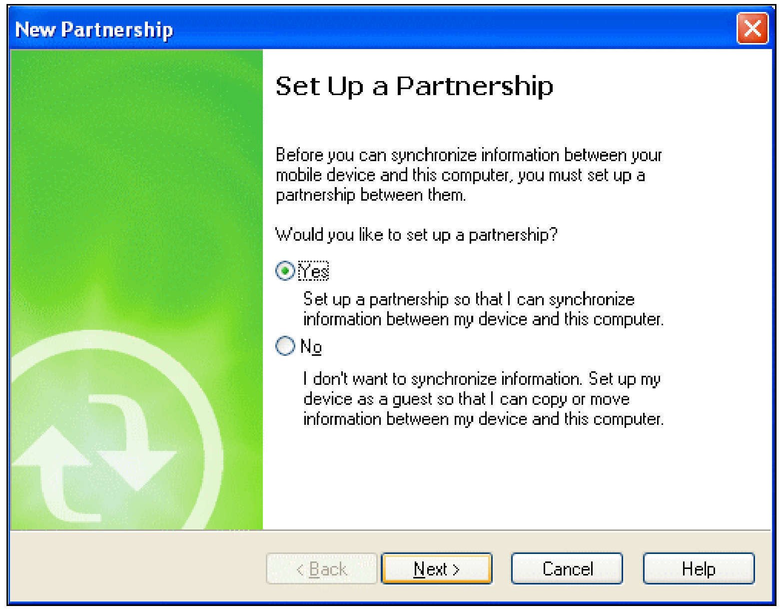
Click the Browse button. Look for the ActiveSync Install folder. Click on setup.exe then Open.

Follow the on-screen instructions in the installation wizard.


</td></tr>
<tr><td>3</td><td>Connect the Symbol cradle to your USB port.</td></tr>
</table>

INSTALLATION INSTRUCTIONS Installing Microsoft ActiveSync onto the PC (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Put the scanner into the cradle. The following screen displays:



Choose “Yes” to set up a partnership.</td></tr>
<tr><td>5</td><td>Follow the on-screen instructions on the wizard to complete installation.</td></tr>
<tr><td>6</td><td>On the ActiveSync screen, click on Tools, then Backup. This will create a backup file which will automatically store collected data onto the PC. Even if the scanner’s battery is allowed to completely discharge, data will still be saved.</td></tr>
</table>

GETTING STARTED

The Symbol MC3090 uses Windows CE with the Windows desktop shown on the display screen of the unit.

When the unit is switched on, the system defaults to the MC30XX Demo program. Using the stylus, click the **Exit** icon to go to the Windows desktop screen.

GETTING STARTED Setting Date and Time

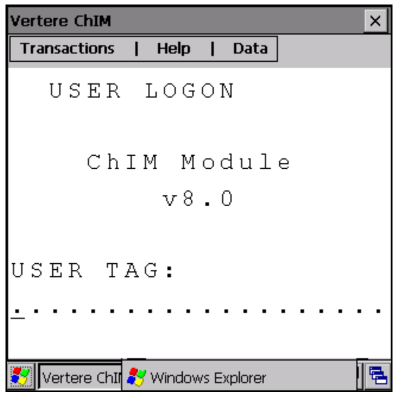
Set the correct date and time on your Symbol unit; all data collection transactions performed with the scanner will use the date and time stored on the unit.

Step	Action
1	On the Windows CE desktop, double-tap the **My Device** icon.
2	Double-tap the **Control Panel** icon.
3	Double-tap the **Date/Time** icon.
4	Use the arrow keys on the on-screen calendar to choose the correct day. Tap to highlight the hour, minutes or seconds, then use the up or down arrows to change to the current time, or use the keypad to enter the correct number.
5	Tap the little **OK** button near the top of the screen to return to the Control Panel, and then exit to the Windows screen.

GETTING STARTED User Logon

At the main Windows screen on the Symbol unit, click the **Vertere ChIM** icon on the desktop.

When the program is initiated, log on as follows:

Prompt	Your Response
	Required value. Scan or Enter your User Tag Number (up to 20 characters or digits). [This is the value assigned in the Settings/User Groups Extended information window; not the user name you use to login.] For System Administrators only: To activate special security features, enter **vertere** (not case sensitive) as the User Tag.

Activating Special Security Features

This option allows the administrator to enter the terminal unit number and force the re-inventory scan condition as follows. You can force users to scan location tags, item tags, or both. You can also limit the menu options available to your users.

Prompt	Your Response
PASSWORD PASSWORD	Required value. Scan or Enter the Administrator password **attitude** (not case sensitive).
UNIT NUMBER UNIT NUMBER:	Optional. Enter a number or name for the Symbol unit (up to 6 characters). The unit number is important if your organization has more than one Symbol MC3090 unit.

The Administrator can add location tags and chemical item tags from the Vertere Inventory Manager program to the device via the ActiveSync function. Then the system can be set up so that the user is forced to validate the tags by checking them against this list of valid location and/or chemical item tags.

GETTING STARTED Activating Special Security Features (continued)

Prompt	Your Response
FORCE SCAN 1 – NONE 2 – ITEM ONLY 3 – LOCATION ONLY 4 – BOTH SELECT: 1	A choice is required. 1-Items and Locations can be keyed or scanned. 2-Items must be scanned. Locations can be keyed or scanned. 3-Locations must be scanned. Items can be keyed or scanned. 4-Items and Locations must both be scanned. You can choose whether your users must scan barcodes or be allowed to enter the barcode numbers manually, and choose which type of barcodes they must scan. Using the Force Scan option eliminates keying errors. “None” is the default value. As soon as a key is pressed, the screen advances to the Force Lookup display. You do not need to press [**ENT**].
FORCE LOOKUP 1 – NONE 2 – ITEM ONLY 3 – LOCATION ONLY 4 – BOTH SELECT:.	This option automatically looks up every tag as it is scanned in order to verify that the tag exists. 1-Does not look up tags. 2-Looks up item tag to make sure it exists. 3-Looks up location tag to verify that the tag is valid. 4-Looks up both item tag and location tag. IMPORTANT: This option should be set to “1” for if you are just beginning to enter data because a lookup cannot be performed until tags have actually been entered into the database. You do not need to press [**ENT]** after making a selection.
PROMPT FOR QUANTITY 1 – NO 2 – YES SELECT:.	Optional. Allows the System Administrator to choose whether the system should prompt the user to enter the quantity when scanning. 1 – User will not be asked to enter quantity. 2 – User will be required to enter quantity. The default setting is “1”; this setting is recommended so that tag values are not scanned by accident into the Quantity field.

GETTING STARTED Activating Special Security Features (continued)

Prompt	Your Response
ENABLE MENU 1 - ADD LOC 6 - DISPOSE 2 – ADD INV 7 - REPLTAG 4 – TRANSFER 5- PHY INV 0 - UTIL ENABLE:	This menu allows you to select the transactions that you want to make available to your users. Enter in all the numbers that represent the menu items to be enabled: 1 - Add Locations 6 – Dispose item 2 – Add Inventory items 7 - Replace Tag 4 - Transfer 5 – Physical Inventory 0 – Utilities Press [**ENT**]. The screen returns to the User Logon screen.

Main Menu

After the initial entry of the User Tag and the Symbol unit identification, the Main Menu displays with a **Select** prompt. The menu will show only the menu items that were enabled using the Administrator Options.

The main menu will display one or more of the following options:

Prompt	Your Response
Transactions | Help | Data | MAIN MENU 1-ADD LOC 6-PHY INV 2-RELOCATE 7-DISPOSE 4-REPL TAG 0-UTIL SELECT:.	Enter in the number that represents the transaction to be performed: 1-Add Locations 6-Physical Inventory 2- Transfer items 7-Dispose items 4-Replace tag 0-Utilities

To select a transaction type, the user will key or scan the transaction number, e.g., 1.

Every data collection transaction begins with the following data:

XA0_,UN___,HU___,HD9/15/2006 11:29

where “XA0_” is the transaction type, UN is the unit number given to the Symbol unit, HU is the user tag number, and HD is the date and time that the transaction was initiated.

To display recently created transaction files, tap the Data tab at the top of the screen.

XA01 = Add Location
XA08 = Relocate
XA05 = Physical Inventory
XA09 = Dispose

The Transactions tab displays a running list of recently-performed transactions.

For more information on file formats, see page 8.19.

DATA COLLECTION Add Locations (XA01)

Authorized users can add location records to the Newport Inventory Manager either at the PC or in the field. To add locations in the field, use transaction 1 in the portable data collector. The application permits the user to add only child records in this version. This assumes that at least one high-level location has been added to the Location tree at the PC.

When you add a location, you will enter the following information:

1) Parent location tag,
2) Tag number of Group with which location(s) will be associated (if any),
3) Tag number of User with which location(s) will be associated (if any),
4) Tag number of the new location, and
5) Short description of new location.

Procedure: When a child location is being created, record the parent location (by scanning or keying the parent tag number), scan or key the barcode tag number that identifies the location group and / or user (the person or entity responsible for the location(s), apply the new tag to the location, and scan the new location tag. Multiple locations can be assigned to the same parent Location, Group, and User. Or the user has the option to change either the Location or the Group and User.

The display and prompts are:

Prompt	Your Response
ADD LOCATION PARENT LOCATION TAG: . . . . FUNC+7=MAIN MENU	Optional. Enter or scan the barcode tag number associated with the parent location, the area to which all the following lower level locations (child locations) will be attached in the Location Tree (up to 15 characters or digits).
ADD LOCATION GROUP TAG: . . . . FUNC+7=MAIN MENU	Optional. Enter or scan the barcode tag number associated with the group, if any, which will be associated with the location (up to 15 characters or digits).
ADD LOCATION USER TAG: . . . . FUNC+7=MAIN MENU	Optional. Enter or scan the barcode tag number associated with the user, if any, which will be associated with the location (up to 15 characters or digits).
ADD LOCATION NEW LOCATION TAG: . . . . FUNC+7=MAIN MENU	Required. Enter or scan the barcode tag number associated with this new child location (up to 15 characters or digits).

DATA COLLECTION Add Locations (continued)

Prompt	Your Response
ADD LOCATION SHORT DESCRIPTION: . . . . FUNC+7=MAIN MENU	Required. Enter a name for the new location (up to 15 characters or digits).
ADD LOCATION 1-NXT LOC 3-CHG GRP 2-CHG PAR 4-CHG USR SELECT: FUNC+7=MAIN MENU	Select from the displayed options: 1-add another lower location to the parent. System returns to New Location Tag screen. 2-change the parent location (e.g., a different building or the next room). System returns to Parent Location Tag screen. 3-change the group and the user to be associated with the next child locations. System returns to Group Tag screen. 4-change the user to be associated with the next child locations. System returns to the User Tag screen.

DATA COLLECTION Relocate (XA08)

Relocate permits the user to complete a relocate transaction (transfer one or more containers from one location and/or user to another location and/or user) with the handheld.

The following rules apply to the Relocate transaction.

1) The date recorded as the relocation date is the transaction date from the handheld. The MC 3090 date shall apply to all records within the group until user changes; a new transaction date and time will be recorded when the user changes.

2) New User Tag – optional; currently the group with which the user may be associated is not captured.

3) New Location Tag – optional if a new user is defined; required if a new user is not defined.

4) Item Tag – the barcode tag number of the item to be relocated is required.

DATA COLLECTION Relocate (continued)

The display and prompts for relocating existing inventory are:

Prompt	Your Response
RELOCATE USER TAG: . . . . FUNC+7=MAIN MENU	Optional. Enter or scan the Tag number associated with the User who will be responsible for the item(s) (up to 15 characters or digits).
RELOCATE NEW LOCATION TAG: . . . . FUNC+7=MAIN MENU	Optional if a user has been defined. Required if a new User has not been defined. Enter or scan the Tag number associated with the Location at which all of the following inventory items will be located (up to 15 characters or digits).
RELOCATE ITEM TAG: . . . . FUNC+7=MAIN MENU	Required. Enter or scan the barcode tag number of the item being relocated in this transfer operation (up to 15 characters or digits). The portable data terminal will automatically loop to this field and allow the user to scan additional item barcodes. To exit the Relocate transaction, press FUNC 7.

DATA COLLECTION Replace Tag

Prompt	Your Response
REPLACE TAG LOCATION TAG: . . . . FUNC+7=MAIN MENU	Required. Enter or scan the barcode tag number associated with the location (up to 15 characters or digits).
REPLACE TAG OLD TAG: . . . . FUNC+7=MAIN MENU	Enter or scan the existing tag number of an active inventory item.
REPLACE TAG NEW TAG: . . . . FUNC+7=MAIN MENU	Enter or scan the new tag number for the item.
REPLACE TAG 1 – NEXT REPLACEMENT 2 – CHANGE LOCATION . . . . FUNC+7=MAIN MENU	1 - Replace the tag of another item in the same location. System moves to Old Tag screen. 2- Replace tag of an item at another location. System moves to Location Tag screen.

DATA COLLECTION Physical Inventory (XA05)

Use this option to conduct a physical inventory that will validate and update your inventory records.

CAUTION: All fields are required.

Before you begin the physical inventory, you must have

- A valid physical inventory process ID
- Tag numbers for storage locations
- A charged Scanner

You must have a *VALID* Physical Inventory Process ID in hand before you use this option. The Process ID is associated with the criteria defined within the Physical Inventory option of the Vertere Inventory Manager. The Process ID will be provided to you by your System Administrator. For example, you may be auditing all the chemical containers on the first floor of a building in Process 1, and the chemicals within a single laboratory in Process 2. More than one process can be underway at any time.

You must know if chemicals are stored to the room level, or to some lower level such as a cabinet or refrigerator. The tag numbers that define locations must either be physically on the location, or be provided to you in a listing before you can begin this process.

DATA COLLECTION Physical Inventory (XA05) (continued)

The display and prompts for the Physical Inventory Process are:

Prompt	Your Response
PHYSICAL INVENTORY PROCESS ID: . . . . FUNC+7=MAIN MENU	Required. Enter or scan the number associated with the inventory process defined in Physical Inventory.
PHYSICAL INVENTORY LOCATION TAG: . . . . FUNC+7=MAIN MENU	Required. Enter or scan the tag number associated with the Location at which all the following were located (up to 15 characters or digits). This can be restricted to “scan only” by using the Administrator Logon mentioned earlier.
PHYSICAL INVENTORY ITEM TAG: . . . . FUNC+7=MAIN MENU	Required. Enter or scan the barcode tag number of the item (up to 15 characters or digits). This can be restricted to “scan only” by using the Administrator Logon mentioned earlier. The portable data terminal will automatically loop to this screen. This will allow the user to scan item barcodes repeatedly. If barcodes are entered manually, the user must press [ENT] after each code.
PHYSICAL INVENTORY QUANTITY: 1. . . . . FUNC+7=MAIN MENU	Required. Enter the quantity of the item. The system will then loop back to the Item Tag screen to enable more items to be added to the Physical Inventory. When all barcodes have been entered, the user can return to the Main Menu.

DATA COLLECTION Dispose (XA09)

The Dispose function permits users to complete a disposal transaction with the handheld. Verify that you have entered a User Tag value for a user whose role includes 'Dispose chemicals'. You should have disposal codes in hand before you use this option.

The display and prompts to record disposal of chemical inventory items are:

Prompt	Your Response
DISPOSE 1-EMPTY CONTAINER 2-CHEMICAL and CONTAINER SELECT: FUNC+7=MAIN MENU	Required. 1 = Container only. 2 = Chemical and Container. Upon choosing this option, the screen goes directly to the Disposal Method screen.
DISPOSE 1-OTHER METHOD 2-DEFAULT METHOD SELECT: FUNC+7=MAIN MENU	Required. This screen is bypassed when Option 2 above, Chemical and Container, is chosen. 1 = Other method; one of the optional codes defined in Setup / System Coded Tables for Disposal Methods. 2 = Default container method as defined in Setup / Settings / Customized Screens. Upon choosing this option, the screen goes directly to the Item Tag screen.
DISPOSE CONT DISPOSAL METHOD: . . . . FUNC+7=MAIN MENU	Required. Enter the disposal code; this is the optional custom code defined in Setup / Settings / System Tables. (This screen does not appear when Option 2, Default Method is chosen)
DISPOSE CONT ITEM TAG: . . . . FUNC+7=MAIN MENU	Required. Enter or scan the barcode tag number of the ITEM being disposed in this transfer operation (up to 15 characters or digits). This prompt will repeat allowing the user to enter multiple container tags. When finished, the user will return to the Main Menu.

DATA COLLECTION Utilities

The handheld Utility menu offers the following options:

Prompt	**Your Response**
UTIL MENU 1-SAVE DATA 2-ERASE DATA 3-CHANGE USER SELECT: FUNC+7=MAIN MENU	Type the number that represents the transaction to be performed: 1 – Save the data file. 2 - Erase the data from the portable data terminal. 3 - Change the user.
DATA SAVED ALL ACTIVE DATA HAS BEEN SAVED. 1-UTIL MENU SELECT:. FUNC+7=MAIN MENU	The data is saved as an ASCII file on the mobile device. This file is ready to be transferred to the PC using the Download process described later.
UNIT IS EMPTY THERE IS NO DATA TO DELETE. 1-UTIL MENU SELECT:. FUNC+7=MAIN MENU	All data in the Symbol unit's memory has been erased.
CHANGE USER ChIM Module v8.0 USER TAG:	Required value. Scan or Enter the new User Tag Number (up to 20 characters or digits).

DOWNLOADING Downloading from the Symbol 3090

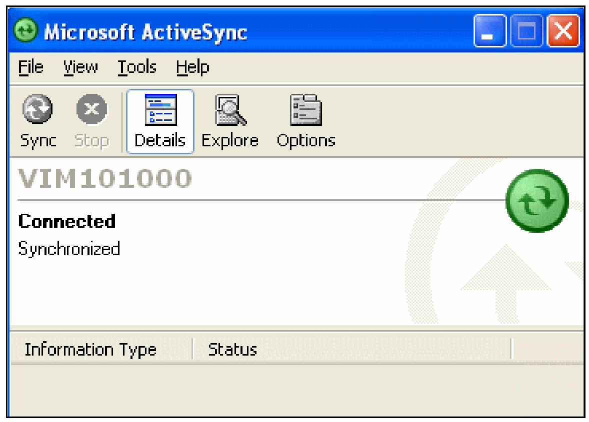
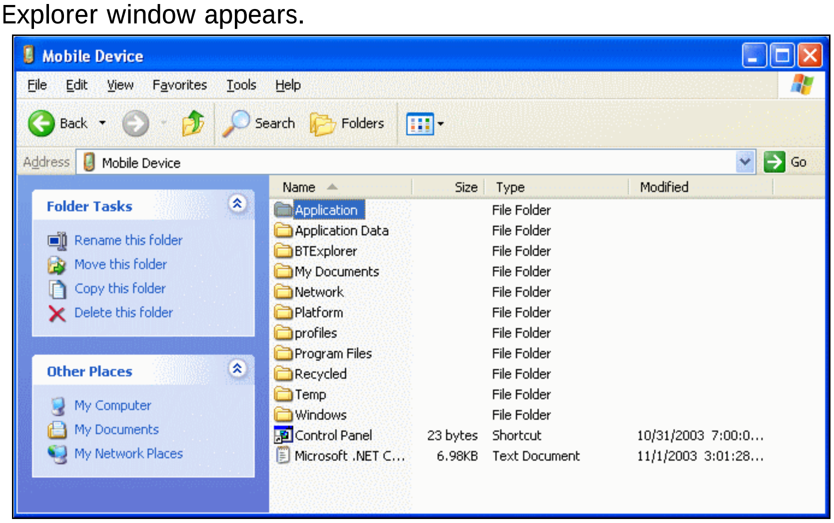
Download Process

Use the Download/Reconcile function to import, review, update, and process data imported from the Symbol MC3090 to the Vertére Inventory Manager tables.

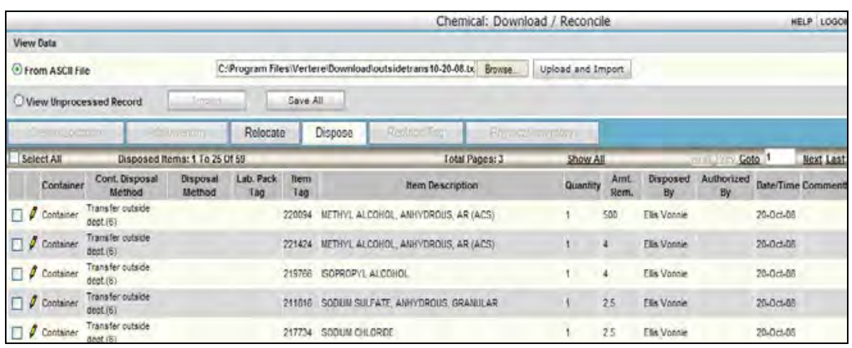
To download data, complete the following steps in the exact order given:

We suggest that you create and store data in a C:\Program Files\Vertere\Download folder, perhaps creating a folder for each year, e.g., Download2009.

DOWNLOADING
Synchronize

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Verify that the Symbol cradle is plugged into your PC's USB port and that the cradle power is ON.</td></tr>
<tr><td>2</td><td>From the main menu on the handheld, select 0-UTIL.</td></tr>
<tr><td>3</td><td>Select option 1 – Save Data and press [ENT]. A message will show on the screen saying that all the active data has been saved.</td></tr>
<tr><td>4</td><td>Place the charged Symbol unit into the cradle. The ActiveSync window will pop up automatically on your PC, and should show that your Symbol unit is connected and synchronized:

</td></tr>
<tr><td>5</td><td>On the ActiveSync window, click the Explore icon. The Mobile Device Explorer window appears.

</td></tr>
</table>

DOWNLOADING Import to PC

Step	Action
6	Open the **Application** folder, then the **Vertere ChIM** folder. The data file will be an *.asc file, such as “123 2006_9_15 11_15.asc”. There may be several of these files from previous downloads; click on the .asc file with the latest date. This is the file that has the latest downloaded data.
7	Move or copy this file to **C:\Program Files\Vertere\Handheld**.
8	Close the Explorer window.
9	On the PC, open the Inventory Manager and go to the **Download / Reconcile** screen.
10	Choose **From ASCII File**. Click **Browse**. Go to **C:\Program Files\Vertere\Download** (or other folder name you are using such as 2009Download). Click on the name of the file that has just been moved. You may view and edit the raw file by right-mouse clicking on the file name and selecting **Open**. Refer to the File Format section that follows to decode the raw data. You may change dates, location tag values, remove rows, etc. However, editing changes must not alter the file format, for example, each line must end with a comma. Save any changes before importing the file.
11	Click **Import**. The transactions display in a grid. Click on the tabs to see the transactions performed for each transaction type.  *Importing Data from an ASCII file*
12	Click **Show All** to display all records and review them for errors. Correct errors if possible by clicking the edit icon. Then either click **Select All** to mark all records for processing or put a checkmark in selected rows. Then click either **Process** or **Update** (depending on the type of transaction being viewed)**.**
13	To save records for later processing, click **Save All.**

DOWNLOADING File Format

Downloaded files share a common format. If you view the *.txt file following a download procedure, this is how you would interpret the data.

Key for Decoding *.txt or *.asc Download Files

Header File

UN – Unit Number of the Device
HU – User Tag Number
HD – Date and time stamp for the transaction

XA01 Create Location Tab

AA-Parent Location Tag
AB-Group Tag
AC-User Tag
AD-New Location Tag
AE-Short Description

XA05 Chemical Module Physical Inventory

HU - User Tag
EP- Inventory Process ID
EA-Scanned Location
EB Inventory Item
EC-Quantity (defaults to 1 container)

XA08 Chemical Module Relocate

HA-User Tag
HB-New Location Tag
HC-Item Tag

XA09 Chemical Disposal

IA-Disposal Option
1 Container only
2 Container and Chemical
IB-Dispose Method
IE-Item Tag

Sample Download File

XA01,UNnone,HU1200,HD09/15/2003
09:14,AA1004,AB0101,AC000001002,AD1020,AELABSYS,
XA05,UN123,HU144,HD05/07/2001 12:45,EP2,EAT1A,EB001004,EC1,
EB001004,EC1,
EB001004,EC1,
EB12846,EC1,
EB12847,EC1,
XA08,UNnone,HU100,HD01/26/2005 09:23,HA004,HB00234,HC01233,
HC012,
HC012028,
HC012384,
XA09,UNnone,HU789,HD02/22/2004 22:23,IA1,IB3,IE10730,
IA2,IB3,IC2,IE289,
IA2,ID16699,
IA1,IB00,IE12766,
IA1,IB00,IE12758,

See Section 6 of this User Guide for details of editing, reconciling and processing downloaded data.

8A. USING THE SYMBOL SPT1800

OVERVIEW

This document provides instructions for using the Symbol SPT1800 (hereafter SPT1800) and related portable data collectors to gather information remotely for importing into the Chemical Module of the Enterprise Vertere Inventory Manager.

The SPT1800 uses the Palm® operating system (Palm OS). Vertere delivers the data collector ready to use. If the battery in the unit has completely discharged, use PalmVIM-C App rebuild REV3.pdf to reinstall the VIM software on your SPT1800. This document is stored on the SPT1800 CD delivered with your hardware.

Review the SPT1800 Series manual delivered with your unit for hardware details such as scanning buttons.

IMPORTANT: Immediately upon receipt of your SPT1800, set up your charging cradle and place the 1800 in the cradle. Whenever the 1800 is not being used, leave it in the cradle. DO NOT permit the 1800's battery to completely discharge – the program and data files WILL BE LOST.

You can enter data by using the laser scanner built into the unit, by using the virtual alpha and number keyboards, or by using the Graffiti 2 stylus input. Click on the Graffiti 2 icon to practice number and letter writing. You can alternate between scanning a barcode, using the virtual keyboards, or inputting values using Graffiti 2.

You will not be able to scan data into any application on the SPT1800 except the Vertere data collection application.

The barcode scanner activates only when a data input field is active. Use the yellow buttons to scan barcode information. When you scan a barcode, audible tones will confirm a decoded barcode value is stored in the database.

The Chemical Module data collection program for the SPT1800—PalmVim_C—supports the three most common transactions: Relocate, Dispose and Physical Inventory (Re-inventory). You can use one or more transactions in a single data collection process. Note: the Physical Inventory requires a valid process ID that is created in Physical Inventory by an authorized user.

During routine operations, you will collect chemical inventory data in the SPT1800, and then transfer that data at a workstation using the Palm OS Hot Sync procedure. The resulting file will have a .pbd extension.

After the .pbd file is stored on the local workstation, you will convert the .pbd file to the VIM.txt format recognized by the Download/Reconcile operation.

INSTALLATION
Installation Warnings

WARNING-Palm Desktop Software conflicts: The SPT Series Desktop software delivered by Vertere on the installation CD can cause conflicts with any Palm Desktop Software that may have already been installed. Only install the SPT software when no other Palm Desktop Software resides on the PC.

If you already have a Palm device (Palm Pilot, Handspring, etc.) that you use on the workstation where the Vertere Inventory Manager client software resides, use your existing Palm Desktop software to perform the Hot Sync operations. **Do not** install the SPT Series Desktop software delivered by Vertere. Go to Step 2 of the Installation Procedures.

To check for existing versions of the Palm Desktop Software, look for a Program Files\Palm\ folder on your C:\ drive or Search for HotSync.exe.

WARNING-Serial Port Conflicts between Palm Desktop Software and other data collection devices: Palm Desktop Software can interfere with Symbol DOS handheld units that use the same serial port for data transfer. To prevent the port conflict when you download from a non-Palm unit, turn off the HotSync function prior to download:

1) Go to the Windows system tray located on the right of the taskbar.
2) Right click on the HotSync icon and choose **Exit**.

To restore the HotSync function, click **HotSyncManager** from the Palm Desktop program group in Start\Programs. HotSync starts upon Windows boot up.

Workstation installation procedures Step 1

If you are sure Palm Desktop software is not installed on your workstation, complete the following steps in the order specified.

1. **Install the SPT Series Desktop Application**
   If the SPT1800 is the first Palm OS device used with your PC, place the Vertere SPT1800 CD into your CD ROM drive.

2. Use **Start \ Run** and **Browse** to locate the **Symbol Series SPT Desktop software \4.1SPTDSKEN-00-4.0.1.exe** file.

3. Double click on the file. Follow the on-screen installation instructions. The Installation routine will create a **C:\Palm** folder.

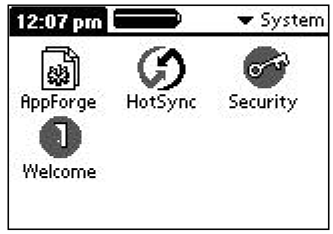
With the Palm software installed, you will be prepared to perform your first HotSync operation, Installation Step 2.

INSTALLATION
Workstation
Installation
Procedures
Step 2

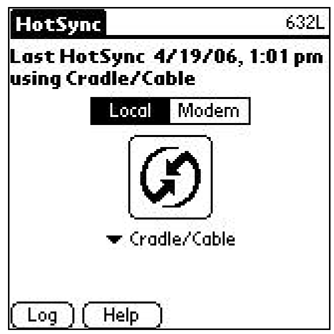
Perform an Initial SPT1800 HotSync

Before collecting data with the SPT1800 unit, perform an initial HotSync by completing the following steps.

1. Turn on the data collector and tap the **HotSync** icon.



2. Make a note of the serial number listed in the upper right corner; you will need this number later in this procedure.



3. Use the supplied cable to connect the Symbol cradle to the computer serial port.

4. Verify the charging light on the cradle is illuminated.

5. Initiate a HotSync by pressing the HotSync button on the right side of the cradle.

6. After you have completed the HotSync operation and defined the serial number of your SPT1800 unit, you are ready to install PvimX, the program that will convert data from the Palm format to the text format required for Download/Reconcile operations.

IMPORTANT: Record the serial number for later use.

INSTALLATION Workstation Installation Procedures Step 3

Install PvimX

The Vertere PvimX program converts data transferred as a **VimData.pdb** file from the SPT1800 to the PC into a **Vim.txt** file for processing in the Download/ Reconcile operation. You must install PvimX on the workstation where the Hot Sync operations will take place. If you purchased multiple SPT1800 units, the path information is grouped by SPT1800 unit owner.

The PvimX installation package resides in the PvimX folder on the SPT1800 CD. Complete the following steps to install the PvimX program files.

1. To install the PvimX program files, use **Start \ Run** and type **D:\Palm_Vim_CX\PvimXinstall.msi**. (Change the drive letter **D** if your CD-ROM drive is not the D drive.) Follow the onscreen instructions. The following folder and files will be installed in your Program Files folder:

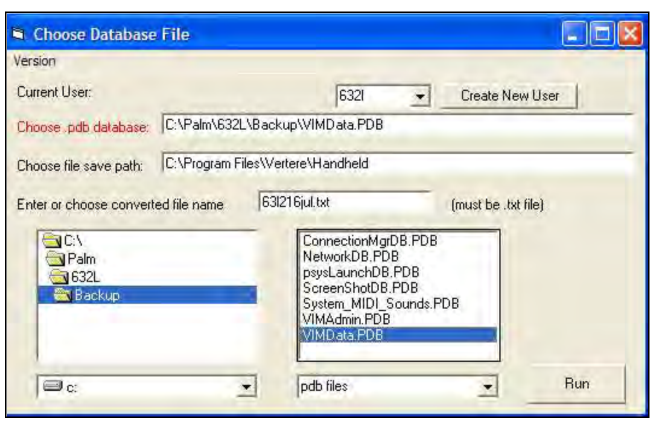
    PvimX\
    AFCore.dll
    VIMsettings.ini
    PbdtotxVB.exe
    PCom.dll
    Guest.id
    User.id (one for each user)

2. To launch the program and complete installation, go to **Start** and select **Start\Programs\PvimX\PvimX**. The Choose Database file form will display.

Note: the 632L in the following examples refers to the serial number entered in Step 2, paragraph 3, “Perform an Initial SPT1800 HotSync”.

3. In the Choose Database File form,
    a) identify the user,
    b) define the Vimdata.pdb database path, and
    c) define the text file save path.

    Performing these tasks will define the default path for future conversions from .pbd to .txt format.

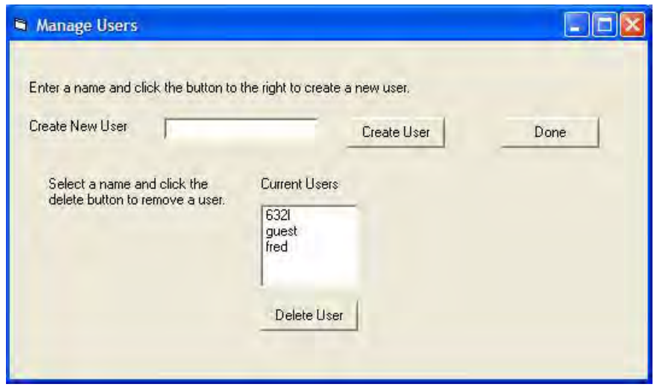


Choose Database File for User 6321

INSTALLATION Workstation Installation Procedures Step 3 (continued)

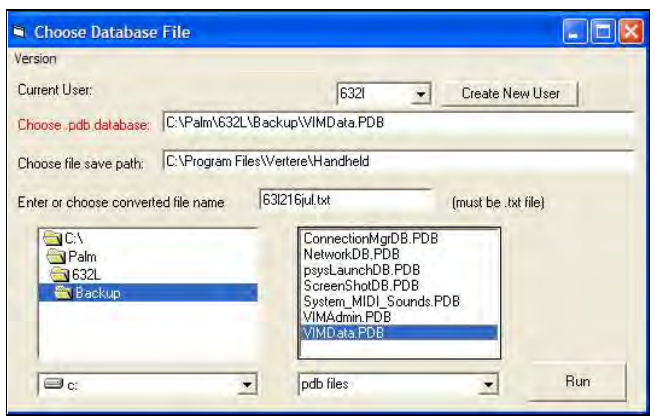
a) **Identify the Current User**.
The default user is **Guest**. ‘Guest’ cannot be deleted.

To add a new user click **Create New User** and the Manage Users form will display. On the Manage Users form, enter the new user name in ‘Create New User’ field then click **Create User**. The new user name displays in the Current Users list.



Manage Users for PVimX

To delete a user, highlight the name in the Current Users list and click **Delete User**. When you are finished, click **[Done]**. The Choose Database File form will display again.



The Choose Database File Screen again

b) **Define .pdb database path**.
This option will define the location for the .pdb file that resulted from the initial HotSync operation. Click in the **Choose .pdb database** field to activate the option. To identify the drive and path, use the drive and folder navigation fields shown in the bottom left corner, navigate to the Vimdata.pdb file. (Typically, C:\Palm\[SPT serial number]\Backup\VIMdata.pdb.) **CAUTION**: Be sure to double click **VIMData.pdb** in the file list field on the right and verify that the complete path displays in the **Choose .pdb database** field.

INSTALLATION Workstation Installation Procedures Step 3 (continued)

The database path to the Palm files may be stored at the root of C:\ or in the Program Files folder. The Palm folder will be on the C:\ drive if you use the SPT_Series_Desktop_4.1.exe installation in Step 1 above.
C:\Palm\632L\Backup\VIMData.pdb (SPT Desktop Software)

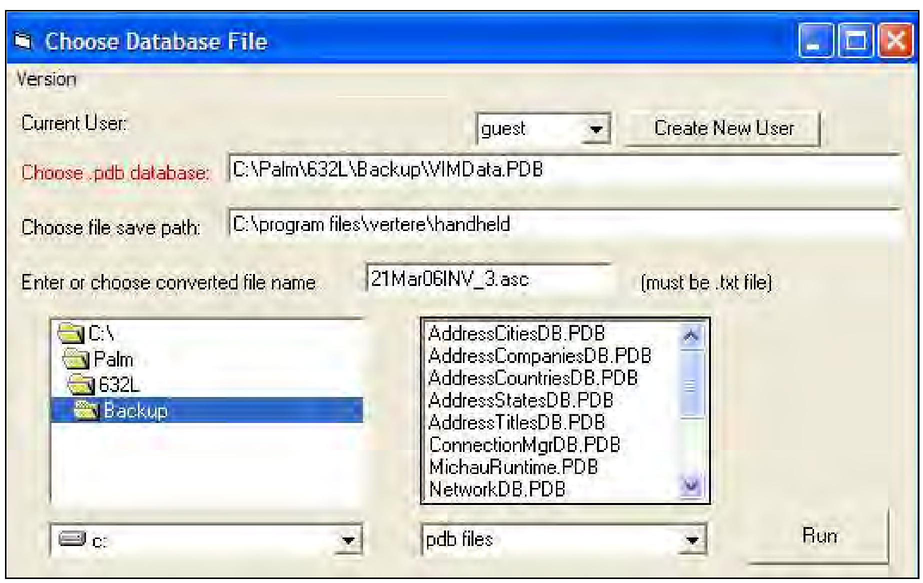
The Palm folder will be in your Program Files folder if you have a previous Palm Desktop software installation.
C:\Program Files\Palm\632L\Backup\VIMData.pdb (Palm Desktop Software)

c) **Define the file save path**.
This option will define the storage location for your text files. When you use the Download/Reconcile option within the Inventory Manager, you will select the file to be processed from this location.

1. Click in the **Choose file save path** field to activate the option. Select the drive, folder, and file boxes to identify the path to the C:\Program Files\Vertere\Handheld folder.

   NOTE: You are not required to store the downloaded files on the local workstation or to store the files in the HANDHELD folder. The Handheld folder stores the files that support your SPT1800 or Symbol 3100 devices.

   You can create a separate folder for your downloaded files, for example, 2004Downloads. To create a separate file, you must use the standard Windows File \ New \ Folder option before you can complete this process.



2. Installation is complete.

d) Click **Run** to test your connections.

DATA COLLECTION Preparations

Check the battery status of the SPT1800 prior to collecting data.

Verify that the SPT1800 unit has the correct date and time because all transactions record date and time. To modify the system date and time, use the **Prefs(**erences)/Date & Time option on the SPT menu.

At the beginning of a scanning session, delete any existing records from the database on the scanner. If you are uncertain whether data in the SPT1800 has been downloaded, you can perform a HotSync operation and save the data before deleting the old records.

To delete the files,

1) Launch the PalmVim_C on the SPT1800.
2) Enter the User ID and tap **Enter**.
3) At the Main Menu tap **Utilities**.

Collect from your System Administrator any required information for the tasks you will perform:

Reinventory – Inventory Process ID, location tags.
Transfer – tag numbers for the users and locations that will be specified.
Disposal – disposal method code.

Consider using the System\Tags\Booklets option in the Inventory Manager to prepare menu listings of the values you will need as you use the SPT1800. Booklets will print the tag fields in barcode format. You might, for example, want to print the location tags, owner tags, or disposal codes for easy use with the SPT.

Power on the SPT 1800

Start the data collector by pressing the red button on the bottom left of the unit.

To preserve battery power, the unit will turn off after a specified amount of idle time: 30 seconds, 1 minute, 2 minutes, or 3 minutes. To define the allotted time, use the **Prefs(erences) / General** menu, **Auto-off After** option. To access the **General** menu, click on the dropdown list in the upper right corner; choose **General**.

Field Input

In the data collection program, you may input data by scanning a barcode, or by using the Grafitti 2 tablet or the Palm OS virtual keyboards. To use the virtual keyboards, tap on **[123]** or **[abc]** to bring up the numeric or QWERTY keypad.

When using the Stylus, tap **Next** to advance the cursor and retain the previous input.

When you use the barcode scanner, values are saved to the database and the cursor is advanced automatically. An arrow icon indicates the active field.

A blinking cursor within the active field indicates ‘ready for input’.

When the scanner is activated, two tones are heard. The first tone indicates the barcode decoding; the second tone verifies that the field value is saved.

Adjust the sound level in **Prefs**(erences)/**General**.

DATA COLLECTION Start/Exit PalmVim_C

Start the application by tapping the **PalmVim_C** icon. You will note a short delay as the application is opened.

At the **Enter User Tag** screen, enter your User Tag. The User Tag is a unique code associated with your log-in User Name in the Inventory Manager. Your inventory manager will provide the value to you.

Tap **Enter**.

To exit the application from any screen within the program, tap the Application icon.

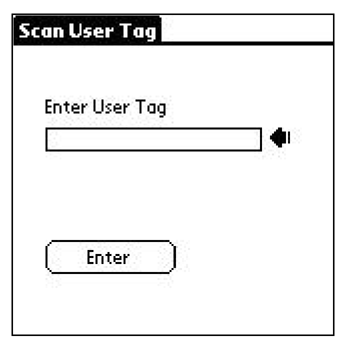
About PalmVim_C

To view information about the application, tap on the Main Menu icon at the top left of the screen.

About PalmVim_C shows version and copyright information.
Exit: Closes PalmVim_C application and exits to Program Files.

Beginning Data Entry

When you turn on the data collection unit, you will see the following prompts. A time/date stamp is recorded when you sign on and for each transaction you perform.

Prompt	Your Response
PalmVim_C **Symbol** Scan Info	Select **PalmVim_C** **NOTE**: All button prompts on the Palm are initiated using the stylus. During software startup the screen blanks while the database initializes.
ENTER USER TAG ENTER	Enter your User Tag (15 alpha numeric, maximum). See the System Administrator for your User Tag. Tap **ENTER** 

Some of the information that will be recorded in the data collection device can be printed in a ‘booklet’ in barcoded format. (See System / Tags for instructions on using the Booklet option.) This data may include, but not be limited to, locations, user/groups, and commonly used system codes (disposal methods) that are defined at the PC.

DATA COLLECTION System Administration

If the System Administrator enters the keyword **Vertere** in the User Tag field, a prompt for a password will display.

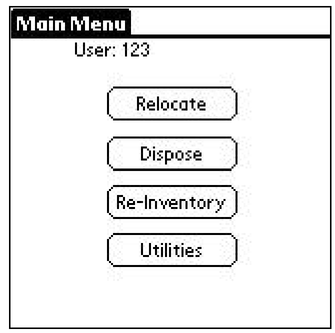
Enter the correct password and the Administration screen displays. The password is maintained by Vertere and is provided to the System Administrator when the SPT1800 is delivered. Call 1.800.628.9917 if the password is lost.

These setup options are available only to the System Administrator.

Prompt	Your Response
ENTER USER TAG ENTER	Tap **Vertere.** Tap **ENTER** and **OK.** Enter System Administration password. 
UNIT ID Physical Inventory Scan Conditions ⦿ Keyed or Scanned ○ Scanned Only	Enter the unit's ID. The Unit ID field identifies the SPT1800 unit. The 'Physical Inventory Scan Conditions' sets the field input for the Physical Inventory screen. Tap the **Keyed or Scanned** option to allow Graffiti 2, keyboard and scanned input. Tap **Scanned Only** to require the user to scan barcodes for all location and tag values. Tap **Save Changes** to retain changes. Tap **Logout** to return to the User Tag screen. 

DATA COLLECTION Selecting the Transaction Type

After you enter information at the initial prompts, the Palm OS displays the Main Menu for the Chemical Module data collection. You can record data for one or more transaction types during any one data collection session. For example, you may move chemicals from one location to another by using the Relocate transaction, then remove containers from your active inventory and record the data in the disposed chemical data set, and finally re-inventory chemicals in a lab. The order is not significant. Each transaction is date-stamped.

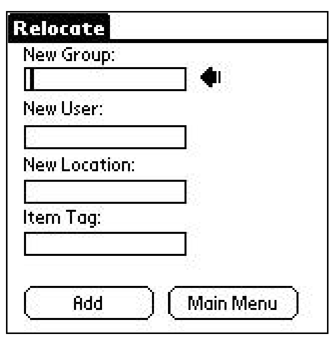
<table>
<tr><th>Prompt</th><th>Your Response</th></tr>
<tr><td>MAIN MENU
Relocate (XA08)
Dispose (XA09)
Re-Inventory (XA05)
Utilities</td><td>Select the transaction type by tapping the stylus on the appropriate option.

</td></tr>
</table>

Exiting from the Main Menu

To exit from the PalmVim_C application, tap **Main Menu** at the top of the display and **Exit**.

Relocate Chemicals (XA08)

Use this option to record a change in user, location, or both for one or more inventory items. You must enter either a new user or a new location to complete the Relocate transaction. When you select the **Relocate** option, the following prompts display.



Prompt	Your Response
RELOCATE NEW GROUP TAG	Scan or enter the Group Tag of the Group to which the new User is assigned.
NEW USER TAG	Scan or enter the User Tag of the individual to whom the item(s) will be assigned. **NOTE**: If a new user is not being identified, use the Stylus to tap in the Location field.

DATA COLLECTION Relocate Chemicals (continued)

Prompt	Your Response
NEW LOCATION TAG	Scan or enter the tag number of the new Location.
ITEM TAG	Scan or enter the barcode number (the 'chemical tag') on each container that will be reassigned.
ADD	If you scan the barcode, the cursor will return to the barcode field so you can scan additional containers. If you use the virtual keyboard to enter the chemical barcode number, use the stylus to tap **Add.** An audible signal will sound to confirm that the record has been saved.
MAIN MENU	Tap **Main Menu** to return to the main menu where you can select another transaction.

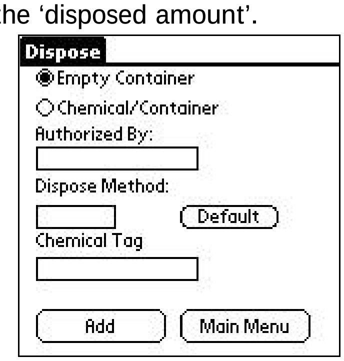
Dispose Chemicals (XA09)

Use this option to dispose chemicals, that is, remove the records from active inventory and maintain their history in the disposed record set. Be sure that you have entered a User tag for an individual who is authorized to dispose inventory.

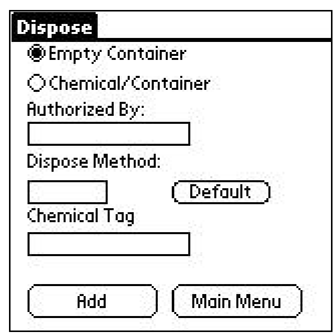
You should have disposal codes in hand before you use this option.

If you are disposing of numerous items, segregate them into Empty or Not Empty groups. Process each group in one batch. You must redefine the status and the disposal method if either value changes for a container.

When you tap **Dispose**, you see the following prompts. *All fields are required*.

Prompt	Your Response
DISPOSE ○ Empty Container ○ Chemical/ Container	Select the appropriate disposal option. **Empty** – If the contents of the container(s) have been completely used, tap **Empty Container**. The system will record the 'disposed amount' as zero. **Not empty** – If some chemical remains, tap **Chemical/Container**. The system will record the amount remaining as the 'disposed amount'. 
AUTHORIZED BY	Optional.

DATA COLLECTION Dispose Chemicals (continued)

Prompt	Your Response
DISPOSE METHOD Default	Enter the code that represents the method used to dispose of the item(s). The code will be provided by your System Administrator from the optional Custom Codes defined in the Disposal Method System Table. If a default value has been defined by your system Administrator and it applies to the item(s) you are disposing, tap **Default** to record the default disposal code. **NOTE:** 00 populates this field when the default disposal method is selected.
CHEMICAL TAG	Scan or enter the barcode number (the chemical tag) on each container you are disposing. If you scan the barcode, the cursor will return to the barcode field so that you can scan (and dispose) additional containers.
ADD	If you key in the chemical barcode number, use the stylus to tap **Add**. An audible signal will sound to confirm that the record has been saved. 
MAIN MENU	Tap **Main Menu** to return to the Main Menu where you can select another transaction.

DATA COLLECTION Physical Inventory (XA05)

Use this option to conduct a physical inventory that will validate and update your inventory records.

CAUTION: All fields are required.

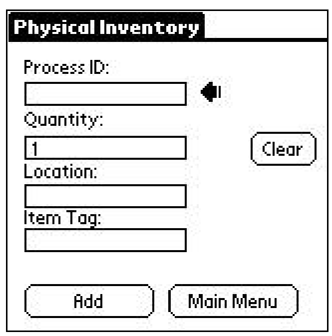
Before you begin the physical inventory, you must have

- A valid physical inventory process ID
- Tag numbers for storage locations
- A charged Scanner

You must have a *VALID* Physical Inventory Process ID in hand before you use this option. The Process ID is associated with the criteria defined within the Physical Inventory option of the Vertere Inventory Manager. The Process ID will be provided to you by your System Administrator. For example, you may be auditing all the chemical containers on the first floor of a building in Process 1, and the chemicals within a single laboratory in Process 2. More than one process can be underway at any time.

You must know if chemicals are stored to the room level, or to some lower level such as a cabinet or refrigerator. The tag numbers that define locations must either be physically on the location, or be provided to you in a listing before you can begin this process.

When you tap **Re-inventory**, you see the following prompts.



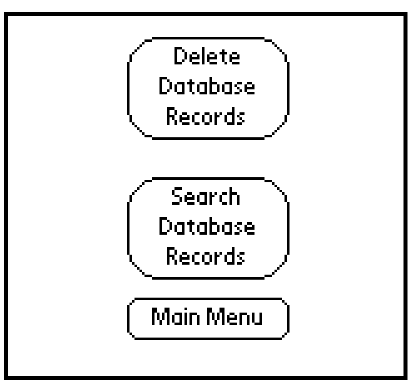
DATA COLLECTION Physical Inventory (XA05) (continued)

Prompt	Your Response
Physical Inventory PROCESS ID	Scan or enter the Process ID. Enter the correct process number, do not make it up.
QUANTITY	The Quantity field defaults to 1. Only tap the Quantity field if the number of items associated with a single barcode is greater than 1.
LOCATION TAG	Scan or enter the location tag that corresponds with the lowest level to which you are tracking chemicals.
CHEMICAL TAG	Scan or enter the barcode number (the chemical tag) on each container in the location you are including in your physical inventory process. If you scan the barcode, the cursor will return to the barcode field so that you can scan (and record) additional containers at the **same** location.
ADD	If you key in the chemical barcode number, use the stylus to tap **Add**. An audible signal will sound to confirm that the record has been saved. When you move to another location, tap **Main Menu**.
MAIN MENU	Tap **Main Menu** to return to application Main Menu where you can re-select **Re-Inventory** and define a new location.

Utilities

Use the Utilities menu to delete all records following a download operation, or to search the collected data, to review or to edit selected records before the download operation.

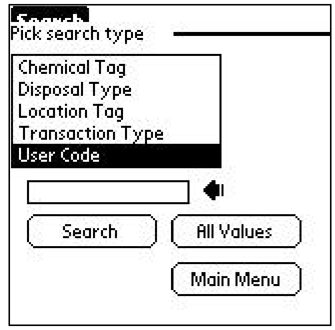
When you tap **Utilities**, you see the following prompts.



DATA COLLECTION Utilities (continued)

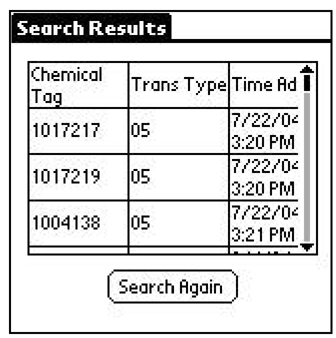
Prompt	Your Response
DELETE DATABASE RECORDS	Tap **Delete Database Records** to erase all existing records in the Palm OS. **CAUTION**: You must perform this function *after* you download records to your workstation. If you do not delete the old records, any new records you enter will be appended to the old database and the old records will be downloaded a second time. When you select the **Delete Database Records** option, the following information box displays. 
SEARCH DATABASE RECORDS	Tap **Search Database Records** to find records previously stored in the Palm OS. You can search all records or filter on chemical tag, disposal type, Location Tag, Transaction Type, or User code. To filter the records, select a search type from the search drop down menu by tapping the stylus on the default search type **Chemical Tag**.

DATA COLLECTION Utilities (continued)

<table>
<tr><th>Prompt</th><th>Your Response</th></tr>
<tr><td>SEARCH DATABASE RECORDS (continued)</td><td>

To search for a specific value such as a chemical tag number, enter at least one digit or character of the record(s) into the search field and tap Search to retrieve records associated with the specified Search Value.
Tap the All Values option to search through the entire set of collected data in chronological order.
Note that when All Values is tapped, an asterisk (*) appears in the search field.
After you have defined your search method, tap Search.</td></tr>
<tr><td>SEARCH RESULTS

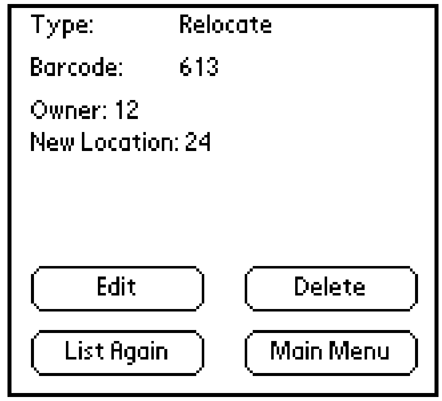
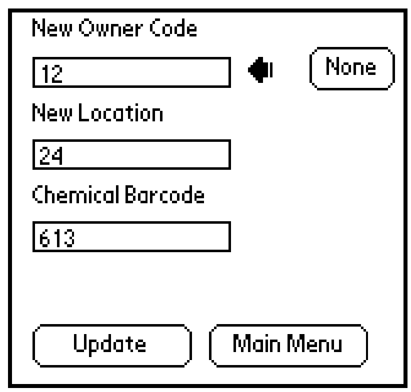
Transaction #   Trans
Relocate   8
Dispose   9
Re-Inventory   5
Utilities
Note: The transaction numbers are used in transferring data to the Inventory Manager.</td><td>Sample of Search Results.



To view or edit details for a single record, tap anywhere on the row.

To return to the Search screen and perform another search, tap Search Again.</td></tr>
</table>

DATA COLLECTION Utilities (continued)

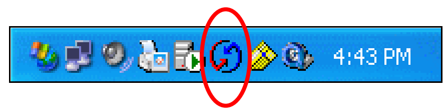
Prompt	Your Response
EDIT DATABASE RECORD	When you tap on the record (row) to be edited, the following window displays. Tap **Edit** to modify the current record.  When **Edit** tab is tapped, the window below displays. You can edit any field. When the desired changes are made, tap **Update** to save changes to the record. 
MAIN MENU	Tap **Main Menu** to return to the application Main Menu.

DOWNLOADING Introduction

Download data stored in the SPT1800 to a workstation by performing a HotSync through a COM port. The HotSync operation will create a file named ChIMdata.pdb. Because all download operations create a file with the same name, you will run PvimX to convert the ChIMdata.pdb into a raw data file and provide a unique name for the new file.

Note: The HotSync software will conflict with any existing Symbol 3100 Series Symbol handheld software you may have installed on your system.

Before you attempt a download with the Symbol 3100 handheld device, verify that the HotSync function is active. Go to the Windows system tray, located on the right-hand end of the taskbar. Right-click on the HotSync icon, then choose **Exit**.



If you need to turn HotSync ON, go to the Palm Desktop program group in **Start \ Programs**. HotSync starts upon Windows boot up.

HotSync

To download data you have collected, verify that the workstation where the Inventory Manager is located is turned on and that the Symbol cradle is connected and powered on.

Place the SPT1800 in the Symbol cradle and press the HotSync button on the Symbol unit. The following prompt appears:

Prompt	Your Response
HotSync Cleaning up – Please wait	
HotSync HotSync Operation Complete	Select **LOCAL** Select **LOG** to view HotSyncLog Select **HELP** to view Palm tips

Converting the .PDB file to ASCII (ASC, TXT extension) Format

Data downloaded from the Palm OS is stored in **ChIMdata.pdb** file. In order for the Inventory Manager to correctly process data transferred from the SPT1800 to your PC, the data must be converted to an *.asc file. If you have not already done so, follow the procedure to configure PvimX (see Installation, Step 3).

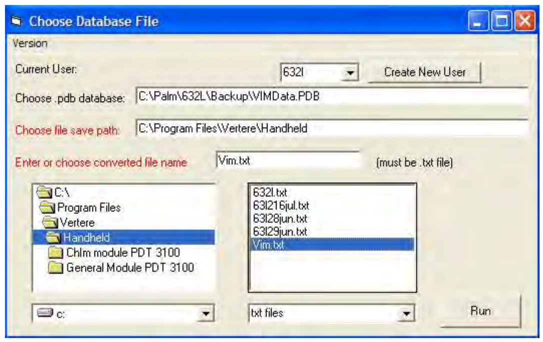
DOWNLOADING DATA
Convert Data (continued)

To complete the download procedure, select the ‘Current User’ that conforms to the SPT1800 you are using.

The PvimX screen shown here is configured for the User 632L. The Vimdata.pdb path and the File Save path are set from configuration data stored when the PvimX configuration occurred.

> **NOTE**: The ‘File Save path’ may be set to the HANDHELD folder or to another location. If in installing your PvimX in the SPT1800 setup process, you created a separate folder for your downloaded files, for example, 2004Downloads, you should use this site-specific folder.

Click in the ‘**Enter or choose converted file name**’ field and create a unique file name for the new record set. The files you have previously stored will be displayed in the box to the right. The name you use must distinguish this new file from all other files that will be created with the Inventory Manager. For example, you may use the date and user name: 07July2004_RSMITH.



Creating a new file

Click **Run**. The following screen displays:

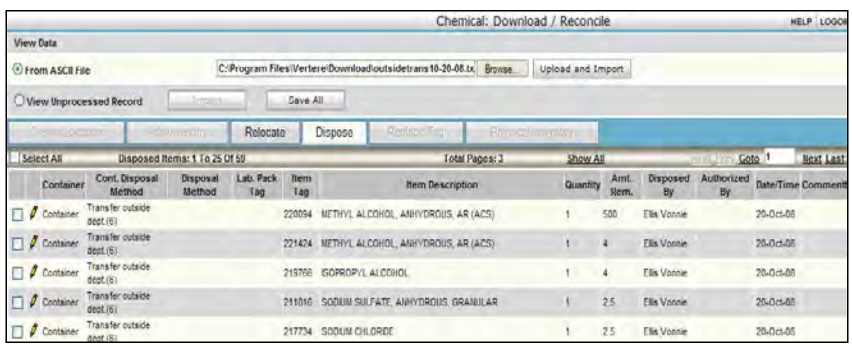
Click **Yes** to process another file from a different SPT1800. Click **No** to exit the program.

Importing Downloaded Data

Use the **Download / Reconcile** functions within the Inventory Manager to import the file and process your data. For more information about processing downloaded data, refer to Section 6 of this Guide, “Download/Reconcile”. Each type of transaction displays on its own tab page, for example, 'Dispose' as shown below. More than one transaction type may be in use from one download file.

The Download/Reconcile functions allow the authorized user to import data to the Vertére Inventory Manager program where records are checked for validity. Errors in the data are highlighted in red and text messages identify the error, for example, ‘Invalid Tag.’

Importing Downloaded Data (continued)

Step	Action
1	Open the **Application** folder, then the **Vertere ChIM** folder. The data file will be an *.asc file, such as “none 123 2006_9_15 11_15.asc”. There may be several of these files from previous downloads; click on the .asc file with the latest date. This is the file that has the latest downloaded data.
2	Move or copy this file to **C:\Program Files\Vertere\Download**.
3	Close the Explorer window.
4	On the PC, open the Inventory Manager and go to the **Download / Reconcile** screen.
5	Choose **From ASCII File**. Click **Browse**. Go to **C:\Program Files\Vertere\Download** (or other folder name you are using such as 2009Download). Click on the name of the file that has just been moved. You may view and edit the raw file by right-mouse clicking on the file name and selecting **Open**. Refer to the File Format section that follows to decode the raw data. You may change dates, location tag values, remove rows, etc. However, editing changes must not alter the file format, for example, each line must end with a comma. Save any changes before importing the file.
6	Click **Import**. The transactions display in a grid. Click on the tabs to see the transactions performed for each transaction type.  *Importing Data from an ASCII file*
7	Click **Show All** to display all records and review them for errors. Correct errors if possible by clicking the edit icon. Then either click **Select All** to mark all records for processing or put a checkmark in selected rows. Then click either **Process** or **Update** (depending on the type of transaction being viewed)**.**
8	To save records for later processing, click **Save All.**

IMPORTING DOWNLOADED DATA
File Format

The following functions are supported by the SPT1800 PalmVIM_C; XA defines the transaction type which also identifies the module to be updated.

TRANSACTION	Description	SPT1800
XA05	Add to Physical Inventory	X
XA08	Relocate	X
XA09	Dispose	X

Downloaded files share a common format. If you view the *.asc file or a *.txt file (from a Symbol 3100) following a download procedure, this is how you would interpret the data. These records can be edited if necessary.

Key for Decoding *.asc or *.txt Download Files

Header File

UN – Unit Number of the Device
HU – User Tag Number
HD – Date and time stamp for the transaction

XA05 Chemical Module Physical Inventory

HU - User Tag
EP- Inventory Process ID
EA-Scanned Location
EB Inventory Item
EC-Quantity (defaults to 1 container)

XA08 Chemical Module Relocate

HA-User Tag
HB-New Location Tag
HC-Item Tag

XA09 Chemical Disposal

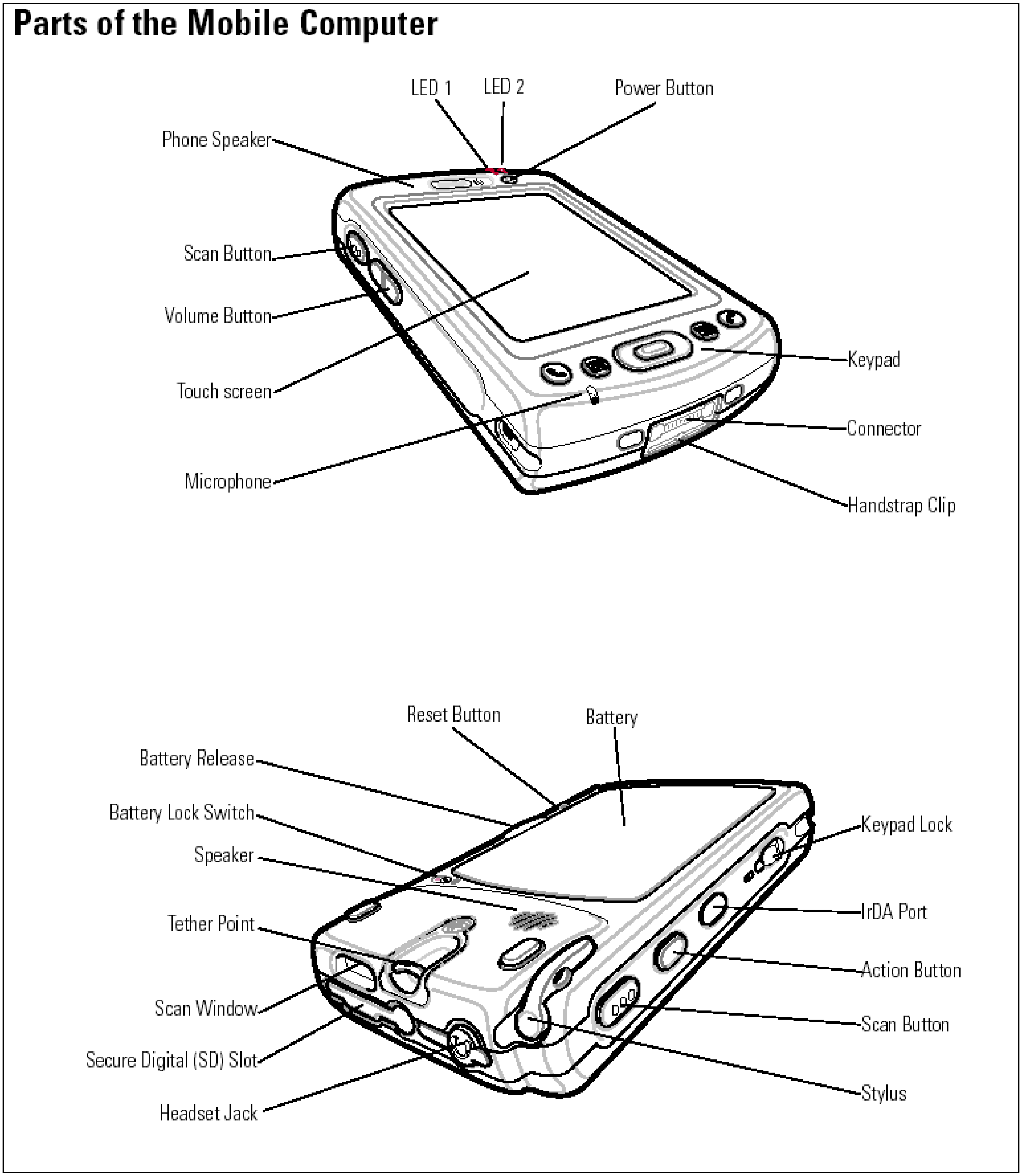
IA-Disposal Method
1 Container only
2 Container and Chemical
IB-Dispose Method
IE-Item Tag

Sample Download File

XA05,UN123,HU144,HD05/07/2001 12:45,EP2,EAT1A,EB001004k,EC1,
EB001004m,EC1,
EB001004n,EC1,
EB12846,EC1,
EB12847,EC1,
XA08,UNnone,HU100,HD01/26/2005 09:23,HA004,HB00234,HC01233,
HC012,
HC012028,
HC012384,
XA09,UNnone,HU789,HD02/22/2004 22:23,IA1,IB3,IE10730,
IA2,IB3,IC2,IE289,
IA2,ID16699,
IA1,IB00,IE12766,
IA1,IB00,IE12758,

8C. Using the Symbol MC50

This section addresses the setup and use of the Symbol MC50 mobile computer.



Overview

This document provides instructions for using the Symbol MC50 and related portable data collectors to gather information remotely for importing into the Chemical Module of the Vertere Inventory Manager.

Instructions for use of Symbol SPT1500, SPT1550, SPT1700, SPT1800 and MC3090 data collectors are provided in a separate section.

Data entry from other barcode readers such as Symbol Cobra LS 1902T that attach to the local workstation to simulate keyboard entry require no software changes. These devices are self-decoding in that they can be implemented to read one or more barcode symbologies. These devices use triggered laser scanners.

Symbol MC50 Keyboard Layout and Use

The Symbol unit used in the Vertere Inventory Manager operation uses a Qwerty keyboard layout and a touch screen with attached stylus. The touch screen will be used mostly in the Windows environment to get into and out of the Vertere Inventory Manager program; within the program, users will use the keypad or scan button to enter data.

Use the diagram that follows to locate the special keys required to use the VIM data collection software in a Qwerty keyboard configuration. Not all of these fields are required, but it is helpful to users to know the commands. (Refer to the MC50 User Guide located on the CD delivered with the unit for detailed keyboard layout)

Key	**Function**
[⦿]	Used to turn on/turn off Symbol unit.
Right or Left Scan Button	Pressing this key turns on the laser beam in order to scan a barcode.
Reset Button	Warm boot function. Used to exit out of Pocket PC without loss of data. Use the stylus to press the reset button located on the back of the unit. It is a small, recessed, black button. After performing a warm boot, the unit will display the Pocket PC desktop.
Keyboard Lock	Move the switch from the unlock position to the lock position. This disables input from the keyboard for travel or storage.

QWERTY Keypad Input Modes

Key	Normal	Shift or CAPS + Key	Orange + Key	Blue + Key
Q	q	Q	&	Start Menu
W	w	W	$	Menu
E	e	E	@	Messaging
R	r	R	%	Calendar
T	t	T	/	Contacts
Y	y	Y	SEND	Phonepad
U	u	U	1	
I	i	I	2	Cursor Up
O	o	O	3	
P	p	P	END/ESC	OK
A	a	A	(	
S	s	S	)	
D	d	D	-	
F	f	F	:	
G	g	G	+	
H	h	H	-	
J	j	J	4	Cursor Left
K	k	K	5	Enter
L	l	L	6	Cursor Right
BACKSPACE	backspace		DEL	
Shift	Shift		CAPS	
Z	z	Z	?	
X	x	X	!	
C	c	C	‘	
V	v	V	“	
B	b	B	=	
N	n	N	7	
M	m	M	8	Cursor Down
,	,		9	
Brightness	Brightness		áü	
TAB	tab			
SPACE	space			
STAR	STAR keyboard		*	
.	.		0	
ENTER	Enter		#	

Note: The key functions can be changed by an application. The keypad may not function exactly as described.

INSTALLATION INSTRUCTIONS

Vertere delivers the Symbol MC50 with the Vertere Inventory Manager Chemical Module program installed. Use these instructions if you purchase a unit from another source or if the software is deleted.

WARNING:
The Symbol must be fully charged before you attempt these procedures. The Symbol has a built in power saver which means it will automatically switch off if left unattended for a period of time. Pressing any key on the keypad will restore power and screen display.

Required Equipment

Verify that you have the following equipment:

- fully charged Symbol unit,
- the Symbol cradle
- USB cable
- Desktop PC with USB port
- access to the HANDHELD directory delivered with Vertere Inventory Manager, usually stored in C:\Program Files\Vertere.
-

Some of the information that will be recorded in the data collection device can be printed in a 'booklet' in barcoded format. (See System / Tags for instructions on using the Booklet option.) This data may include, but not be limited to, locations, user/groups, and commonly used system codes (disposal methods) that are defined at the PC.

INSTALLATION INSTRUCTIONS

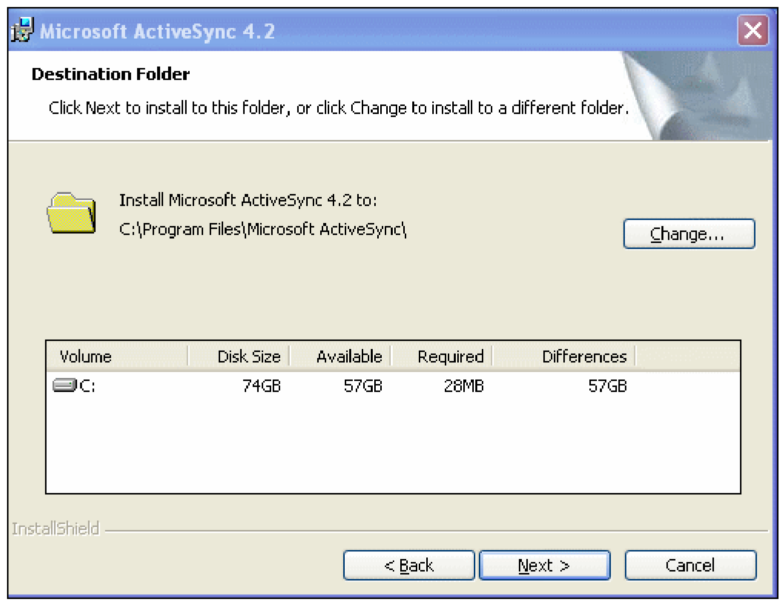
The following section describes the steps required to load the data collection program on the Symbol unit.

Installing Microsoft ActiveSync on your PC

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Insert the CD delivered with your Symbol unit into your computer's CD-ROM drive.</td></tr>
<tr><td>2</td><td>Click on Start then Run.

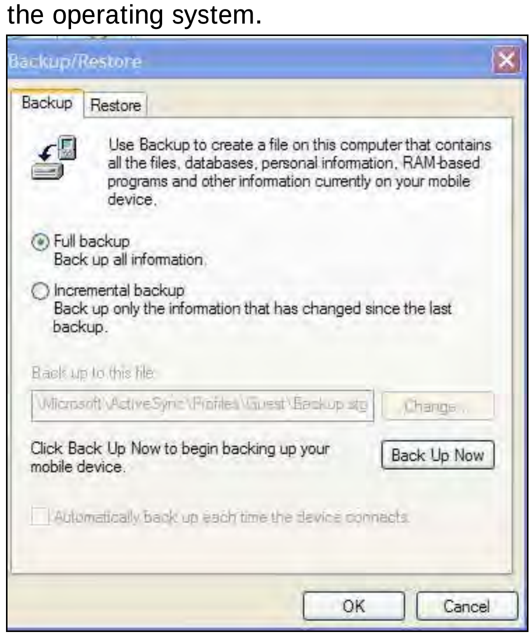
Click the Browse button. Look for the ActiveSync Install folder. Click on setup.exe then Open.

Follow the on-screen instructions in the installation wizard to install ActiveSync on your workstation.


</td></tr>
<tr><td>3</td><td>Connect the Symbol cradle to your USB port.</td></tr>
</table>

INSTALLATION INSTRUCTIONS Installing Microsoft ActiveSync onto the PC (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Put the scanner into the cradle. The following screen displays. You do not want to establish a partnership, so choose “No” to set up the device as a guest.

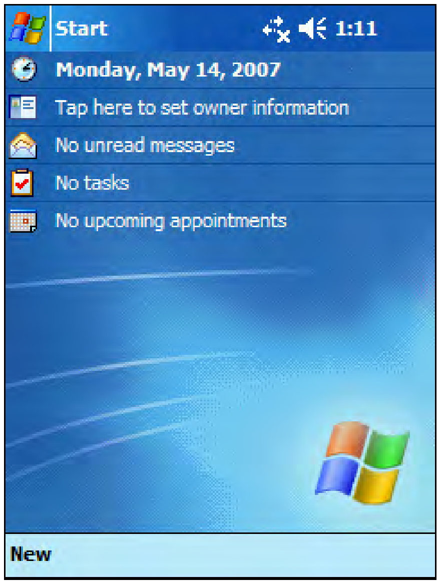
</td></tr>
<tr><td>5</td><td>Follow the on-screen instructions on the wizard to complete installation.</td></tr>
<tr><td>6</td><td>On the ActiveSync screen, click on Tools, then Backup/Restore. This will create a backup file. This backup file will be used to restore the operating system.


Click the Back Up Now button to create a back up file. This will create a backup file which will automatically store collected data onto the PC. Even if the scanner’s battery is allowed to completely discharge, data will still be saved.</td></tr>
</table>

GETTING STARTED

The Symbol MC50 uses Pocket PC 2003 with the Windows desktop displayed on the display screen of the unit.

When the MC50 is switched on, the system defaults to the MC50 Windows desktop screen.

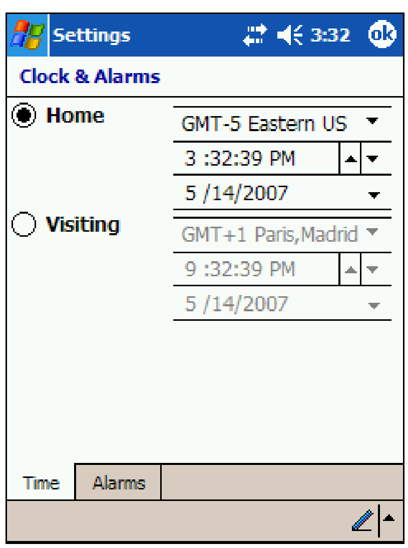


GETTING STARTED Setting Date and Time

Set the correct date and time on your Symbol unit; all data collection transactions performed with the scanner will use the date and time stored on the unit.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Pocket PC desktop, tap the Start icon.</td></tr>
<tr><td>2</td><td>Tap the Settings icon.</td></tr>
<tr><td>3</td><td>Tap on the System tab.</td></tr>
<tr><td>4</td><td>Tap the Clock & Alarms icon.

</td></tr>
<tr><td>5</td><td>Use the arrow keys on the on-screen calendar to choose the correct day for your Home clock. Tap to highlight the hour, minutes or seconds, then the up or down arrows to change to the current time, or use the keypad to enter the correct number.

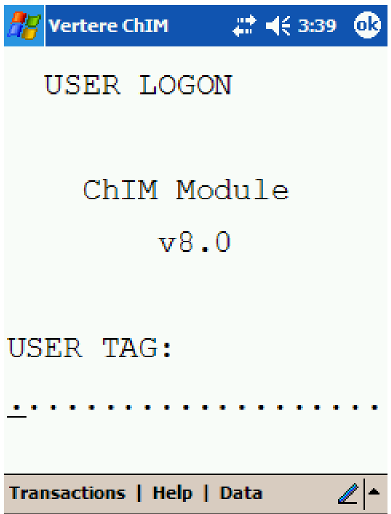


</td></tr>
<tr><td>6</td><td>Tap the little OK button near the top right of the screen to return to the Control Panel, and then exit back to the Settings screen.</td></tr>
</table>

GETTING STARTED
User Logon

From the main Windows screen on the Symbol unit, tap the **Start** then the **Vertere** icon. Next tap the **Vertere ChIM** icon.

When the program is initiated, log on as follows:

Prompt	Your Response
	Required value. Scan or key your User Tag Number (up to 20 characters or digits). [this is the value assigned in the Settings/User Groups Extended information window; not user name] -skip to Main Menu section for general user instructions For System Administrators only: To activate special security features, enter **vertere** (not case sensitive) as the User Tag.

Activating Special Security Features

This option allows the administrator to enter the terminal unit number and force the re-inventory scan condition as follows. You can force users to scan location tags, item tags, or both. You can also limit the menu options available to your users.

Prompt	Your Response
PASSWORD	Required value. Scan or Enter the Administrator password **attitude** (not case sensitive).
UNIT NUMBER:	Optional. Enter a number or name for the Symbol unit (up to 6 characters). The unit number becomes important if your organisation has more than one Symbol MC50 unit – each unit must be given a unique name.

In addition, the Administrator can load the device with valid location tags and chemical item tags from the Vertere Inventory Manager program to the device via the ActiveSync function. Then the system can be set up so that the user is forced to validate the tags by checking them against this list of valid location and/or chemical item tags.

Activating Special Security Features (continued)

Prompt	Your Response
FORCE SCAN 1 – NONE 2 – ITEM ONLY 3 – LOCATION ONLY 4 – BOTH SELECT: 1	Required. 1-Items and Locations can be keyed or scanned. 2-Items must be scanned. Locations can be keyed or scanned. 3-Locations must be scanned. Items can be keyed or scanned. 4-Items and Locations must both be scanned. You can choose whether your users must scan barcodes or be allowed to enter the barcode numbers manually, and choose which type of barcodes they must scan. Using the Force Scan option eliminates keying errors. "None" is the default value. As soon as a key is pressed, the screen advances to the Force Lookup display. You do not need to press [**ENT**].
PROMPT FOR QUANTITY 1 – NO 2 – YES SELECT:.	Optional. Allows the System Administrator to choose whether the system should prompt the user to enter the quantity when scanning. 1 – User will not be asked to enter quantity. 2 – User will be required to enter quantity. The default setting is "1", and this setting is recommended so that tag values are not scanned by accident into the Quantity field.
FORCE LOOKUP 1 – NONE 2 – ITEM ONLY 3 – LOCATION ONLY 4 – BOTH SELECT:.	This option automatically looks up every tag as it is scanned in order to verify that the tag exists. 1-Does not look up tags. 2-Looks up item tag to make sure it exists. 3-Looks up location tag to verify that the tag is valid. 4-Looks up both item tag and location tag. IMPORTANT: This option should be set to "1" for if you are just beginning to enter data because a lookup cannot be performed until tags have actually been entered into the database. You do not need to press **[ENT]** after making a selection.

Activating Special Security Features (continued)

Prompt	Your Response
ENABLE MENU 1 - ADD LOC 6 – PHY INV 2 – RELOCATE 7 - DISPOSE 4 – REPL TAG 0 - UTIL ENABLE:	This menu allows you to select the transactions that you want to make available to your users. Key in all the numbers that represent the menu items to be enabled: 1 - Add Locations 6 - Physical Inventory 2 - Relocate Items 7 – Dispose Items 4 - Replace Tag 0 - Utilities Press [ORANGE][END]. The display returns to the Logon screen.

Main Menu

After the user enters User Tag and a number identifying the Symbol unit the Main Menu displays with a **Select** prompt. The menu will show only the menu items that were enabled using the Administrator Options.

The main menu offers the following options:

Prompt	Your Response
MAIN MENU 1-ADD LOC 6-PHY INV 2-RELOCATE 7-DISPOSE 4-REPL TAG 0-UTIL SELECT:.	Key in the number that represents the transaction to be performed: 1-Add Locations 6-Physical Inventory 2- Transfer items 7-Dispose items 4-Replace tag 0-Utilities

To select a transaction type, the user will key or scan the transaction number, e.g., 1.

Every data collection transaction begins with the following data:

XA0_,UN___,HU___,HD9/15/2006 11:29

where "XA0_" is the transaction type, UN is the unit number given to the Symbol unit, HU is the user tag number, and HD is the date and time that the transaction was done.

To display recently created transaction files, tap the Data tab at the top of the screen.
XA01 = Add Location
XA08 = Relocate
XA05 = Physical Inventory
XA09 = Dispose

The Transactions tab displays a running list of recently-performed transactions.

DATA COLLECTION Add Locations (XA01)

Location records can be added to the Vertere Inventory Manager either at the PC by authorized users or in the field by using the portable data collection device. The application permits the user to add only child records in this version. This assumes that at least one high-level location has been added to the Location tree at the PC because every record requires a parent. If an invalid parent is added in the field, the system permits the user to correct it during the reconciliation process in Download/Reconcile.

When you add a location, you will enter the following information:

1) Parent location tag,
2) Tag number of Group with which location(s) will be associated,
3) Tag number of User with which location(s) will be associated,
4) Newly created location tag,
5) Short description of new location

Procedure: When a child location is being created, record the parent location (by scanning or keying the parent tag number), scan or key the barcode tag number that identifies the location group and / or user (the person or entity responsible for the location(s), apply the new tag to the location, and scan the new location tag. Multiple locations can be assigned to the same parent Location, Group, and User. Or the user has the option to change either the Location or the Group and User.

The display and prompts are:

Prompt	Your Response
ADD LOCATION PARENT LOCATION TAG: . . . . ORANGE+END=MAIN MENU	Optional. Key or scan the barcode tag number associated with the parent location, the area to which all the following lower level locations (child locations) will be attached in the Location Tree (up to 15 characters or digits).
ADD LOCATION GROUP TAG: . . . . ORANGE+END=MAIN MENU	Optional. Key or scan the barcode tag number associated with the group, if any, which will be associated with the location (up to 15 characters or digits).
ADD LOCATION USER TAG: . . . . ORANGE+END=MAIN MENU	Optional. Key or scan the barcode tag number associated with the user, if any, which will be associated with the location (up to 15 characters or digits).
ADD LOCATION NEW LOCATION TAG: . . . . ORANGE+END=MAIN MENU	Required. Key or scan the barcode tag number associated with this new child location (up to 15 characters or digits).

DATA COLLECTION Add Locations (continued)

Prompt	Your Response
ADD LOCATION SHORT DESCRIPTION: . . . . ORANGE+END=MAIN MENU	Required. Enter a name for the new location (up to 15 characters or digits).
ADD LOCATION 1-NXT LOC 3-CHG GRP 2-CHG PAR 4-CHG USR SELECT: ORANGE+END=MAIN MENU	Select from the displayed options: 1-add another lower location to the parent. System returns to New Location Tag screen. 2-change the parent location (e.g., a different building or the next room). System returns to Parent Location Tag screen. 3-change the group and the user to be associated with the next child locations. System returns to Group Tag screen. 4-change the user to be associated with the next child locations. System returns to the User Tag screen.

DATA COLLECTION Relocate (XA08)

Relocate permits the user to complete a relocate transaction (transfer one or more containers from one location and/or user to another location and/or user) with the handheld.

The following rules apply to the Relocate transaction.

1) The date recorded as the relocation date is the transaction date from the handheld. The MC50 date shall apply to all records within the group until user changes; a new transaction date and time will be recorded when the user changes.

2) New User Tag – optional; currently the group with which the user may be associated is not captured.

3) New Location Tag – optional; if a new user is not defined, a new location is required.

4) Item Tag – the barcode tag number of the item to be relocated is required.

DATA COLLECTION Relocate (continued)

The display and prompts for relocating existing inventory are:

Prompt	Your Response
ADD LOCATION GROUP TAG: . . . . ORANGE+END=MAIN MENU	Optional. Key or scan the barcode tag number associated with the group, if any, which will be associated with the location (up to 15 characters or digits).
RELOCATE USER TAG: . . . . ORANGE+END=MAIN MENU	Optional. Key or scan the Tag number associated with the User who will be responsible for the item(s) (up to 15 characters or digits).
RELOCATE NEW LOCATION TAG: . . . . ORANGE+END=MAIN MENU	Optional if a user has been defined. Required if the User Tag has not been defined. Key or scan the Tag number associated with the Location at which all of the following inventory items will be located (up to 15 characters or digits).
RELOCATE ITEM TAG: . . . . ORANGE+END=MAIN MENU	Required. Key or scan the barcode tag number of the item being relocated in this transfer operation (up to 15 characters or digits). The portable data terminal will automatically loop to this field and allow the user to scan additional item barcodes.

DATA COLLECTION Replace Tag

Prompt	Your Response
REPLACE TAG LOCATION TAG: . . . . ORANGE+END=MAIN MENU	Required. Key or scan the barcode tag number associated with the location (up to 15 characters or digits).
REPLACE TAG OLD TAG: . . . . ORANGE+END=MAIN MENU	Enter or scan the existing tag number of an active inventory item.
REPLACE TAG NEW TAG: . . . . ORANGE+END=MAIN MENU	Enter or scan the new tag number for the item.
REPLACE TAG 1 – NEXT REPLACEMENT 2 – CHANGE LOCATION . . . . ORANGE+END=MAIN MENU	1 - Replace the tag of another item in the same location. System moves to Old Tag screen. 2- Replace tag of an item at another location. System moves to Location Tag screen.

DATA COLLECTION Physical Inventory (XA05)

Use this option to conduct a physical inventory that will validate and update your inventory records.

CAUTION: All fields are required.

Before you begin the physical inventory, you must have

- A valid physical inventory process ID
- Tag numbers for storage locations
- A charged Scanner

You must have a *VALID* Physical Inventory Process ID in hand before you use this option. The Process ID is associated with the criteria defined within the Physical Inventory option of the Vertere Inventory Manager. The Process ID will be provided to you by your System Administrator. For example, you may be auditing all the chemical containers on the first floor of a building in Process 1, and the chemicals within a single laboratory in Process 2. More than one process can be underway at any time.

You must know if chemicals are stored to the room level, or to some lower level such as a cabinet or refrigerator. The tag numbers that define locations must either be physically on the location, or be provided to you in a listing before you can begin this process.

Physical Inventory (XA05) (continued)

The display and prompts for the Physical Inventory Process are:

Prompt	Your Response
PHYSICAL INVENTORY PROCESS ID: . . . . ORANGE+END=MAIN MENU	Required. Key or scan the number associated with the inventory process defined in Physical Inventory.
PHYSICAL INVENTORY LOCATION TAG: . . . . ORANGE+END=MAIN MENU	Required. Key or scan the tag number associated with the Location at which all the following were located (up to 15 characters or digits). This can be restricted to "scan only" by using the Administrator Logon mentioned earlier.
PHYSICAL INVENTORY ITEM TAG: . . . . ORANGE+END=MAIN MENU	Required. Key or scan the barcode tag number of the item (up to 15 characters or digits). This can be restricted to "scan only" by using the Administrator Logon mentioned earlier. The portable data terminal will automatically loop to this screen. This will allow the user to scan item barcodes repeatedly.
PHYSICAL INVENTORY QUANTITY: 1. . . . . ORANGE+END=MAIN MENU	Required when enabled. Enter the quantity of the item. This entry can be disabled by the system administrator. The system will then loop back to the Item Tag screen to enable more items to be added to the Physical Inventory. When all barcodes have been entered, the user can return to the Main Menu.

DATA COLLECTION Dispose (XA09)

The Dispose function permits users to complete a disposal transaction with the handheld. Verify that you have entered a User Tag value for a user whose role includes 'Dispose chemicals'. You should have disposal codes in hand before you use this option.

The display and prompts to record disposal of chemical inventory items are:

Prompt	Your Response
DISPOSE 1-EMPTY CONTAINER 2-CHEMICAL and CONTAINER SELECT: ORANGE+END=MAIN MENU	Required. 1 = Container only. 2 = Chemical and Container. Upon choosing this option, the screen goes directly to the Disposal Method screen.
DISPOSE 1-OTHER METHOD 2-DEFAULT METHOD SELECT: ORANGE+END=MAIN MENU	Required. This screen is bypassed when Option 2 above, Chemical and Container, is chosen. 1 = Other method; one of the optional codes defined in Setup / System Coded Tables for Disposal Methods. 2 = Default container method as defined in Setup / Settings / Customized Screens. Upon choosing this option, the screen goes directly to the Item Tag screen.
DISPOSE CONT DISPOSAL METHOD: . . . . ORANGE+END=MAIN MENU	Required. Enter the disposal code; this is the optional custom code defined in Setup / Settings / System Tables. (This screen does not appear when Option 2, Default Method is chosen)
DISPOSE CONT ITEM TAG: . . . . ORANGE+END=MAIN MENU	Required. Key or scan the barcode tag number of the ITEM being disposed in this transfer operation (up to 15 characters or digits). This prompt will repeat allowing the user to enter multiple container tags. When finished, the user will return to the Main Menu.

DATA COLLECTION Utilities

The handheld Utility menu offers the following options:

Prompt	Your Response
UTIL MENU 1-SAVE DATA 2-ERASE DATA 3-CHANGE USER SELECT:. ORANGE+END=MAIN MENU	Type the number that represents the transaction to be performed: 1 – Save the data file. 2 - Erase the data from the portable data terminal. 3 - Change the user.
DATA SAVED ALL ACTIVE DATA HAS BEEN SAVED. 1-UTIL MENU SELECT:. ORANGE+END=MAIN MENU	The data is saved as an ASCII file on the mobile device. This file is ready to be transferred to the PC using the Download process described later.
UNIT IS EMPTY THERE IS NO DATA TO DELETE. 1-UTIL MENU SELECT:. ORANGE+END=MAIN MENU	All data in the Symbol unit's memory has been erased.
CHANGE USER ChIM Module v8.0 USER TAG:	Required value. Scan or key the new User Tag Number (up to 20 characters or digits).

DOWNLOADING
Download from the Symbol 50

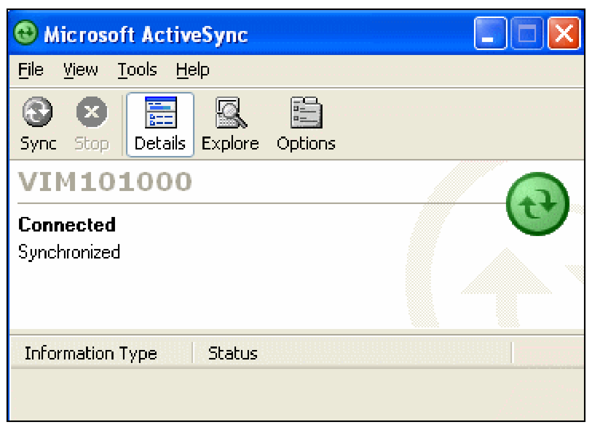
Download Process

Use the Download/Reconcile function to import, review, update, and process data imported from the Symbol MC50 to the Vertére Inventory Manager tables.

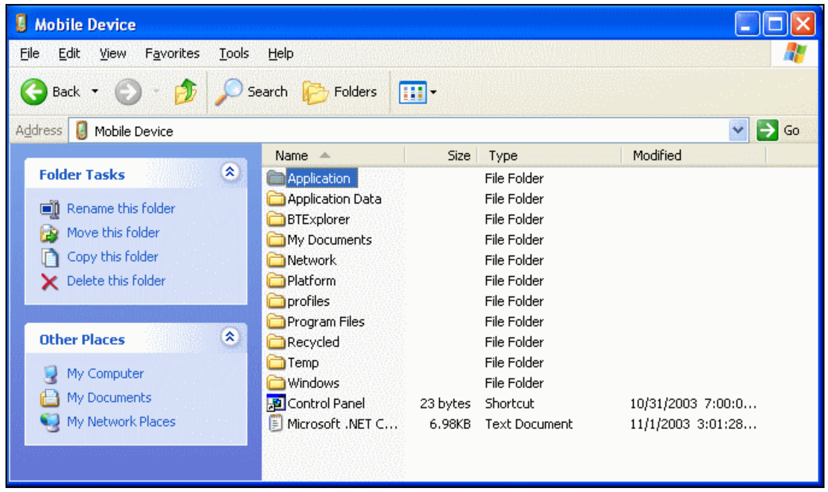
To download data, complete the following steps in the exact order given:

It is suggested that the data be stored in the C:\Program Files\Vertere\Handheld folder.

Synchronize

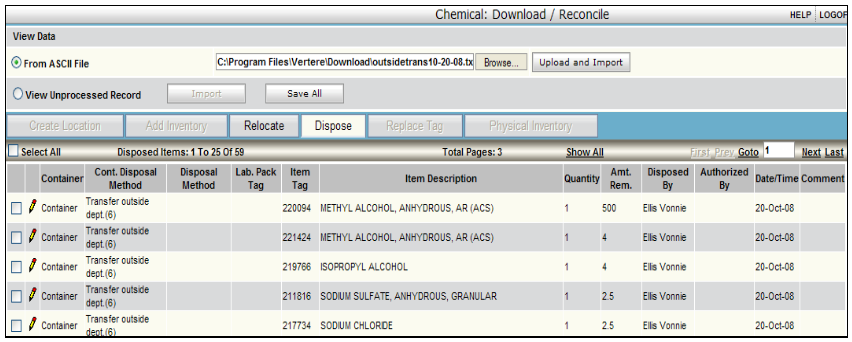
Step	Action
1	Verify that the Symbol cradle is plugged into your PC's USB port and that the cradle power is ON.
2	From the main menu on the handheld, select **0-UTIL**.
3	Select option **1 – Save Data** and press **[ENT].** A message will show on the screen saying that all the active data has been saved.
4	Place the charged Symbol unit into the cradle. The ActiveSync window will pop up automatically on your PC, and should show that your Symbol unit is connected and synchronized: 

DOWNLOADING
Import to PC

Step	Action
5	On the ActiveSync window, click the **Explore** icon. The Mobile Device Explorer window appears. 
6	Open the **Application** folder, then the **Vertere ChIM** folder. The data file will be an *.asc file, such as "123 2006_9_15 11_15.asc". There may be several of these files from previous downloads; click on the .asc file with the latest date. This is the file that has the latest downloaded data.
7	Move or copy this file to **C:\Program Files\Vertere\Handheld** (or other folder name you use such as '2009Downloads)).
8	Close the Explorer window.
9	On the PC, open the Inventory Manager and go to the **Download / Reconcile** screen.

DOWNLOADING Import to Download / Reconcile

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Choose From ASCII File. Click Browse. Go to C:\Program Files\Vertere\Download (or other folder name you are using such as 2009Download). Click on the name of the file that has just been moved.</td></tr>
<tr><td>11</td><td>Click Import. The transactions display in a grid. Click on the tabs to see the transactions performed for each transaction type.



Importing Data from an ASCII file</td></tr>
<tr><td>12</td><td>Click Show All to display all records and review them for errors. Correct errors if possible and either click Select All to mark all records for processing or put a checkmark in selected rows. Then click either Process or Update (depending on the type of transaction being viewed).</td></tr>
<tr><td>13</td><td>To save records for later processing, click Save All.</td></tr>
</table>

DOWNLOADING File Format

Downloaded files share a common format. If you view the *.txt file following a download procedure, this is how you would interpret the data.

Key for Decoding *.txt or *.asc Download Files

Header File

UN – Unit Number of the Device
HU – User Tag Number
HD – Date and time stamp for the transaction

XA01 Create Location Tab

AA-Parent Location Tag
AB-Group Tag
AC-User Tag
AD-New Location Tag
AE-Short Description

XA05 Chemical Module Physical Inventory

HU - User Tag
EP- Inventory Process ID
EA-Scanned Location
EB Inventory Item
EC-Quantity (defaults to 1 container)

XA08 Chemical Module Relocate

HA-User Tag
HB-New Location Tag
HC-Item Tag

XA09 Chemical Disposal

IA-Disposal Option
1 Container only
2 Container and Chemical
IB-Dispose Method
IE-Item Tag

Sample Download File

XA01,UNnone,HU1200,HD09/15/2003
09:14,AA1004,AB0101,AC000001002,AD1020,AELABSYS,
XA05,UN123,HU144,HD05/07/2001 12:45,EP2,EAT1A,EB001004,EC1,
EB001004,EC1,
EB001004,EC1,
EB12846,EC1,
EB12847,EC1,
XA08,UNnone,HU100,HD01/26/2005 09:23,HA004,HB00234,HC01233,
HC012,
HC012028,
HC012384,
XA09,UNnone,HU789,HD02/22/2004 22:23,IA1,IB3,IE10730,
IA2,IB3,IC2,IE289,
IA2,ID16699,
IA1,IB00,IE12766,
IA1,IB00,IE12758,

See Section 6 of this User Guide for details of editing, reconciling and processing downloaded data.

Validation Reports

The Validation reports are located on the MC-50 CD delivered with the hardware. Go to Validation Reports folder on the CD. Locate the Valid_tag.rpt or Valid_Loc.rpt.

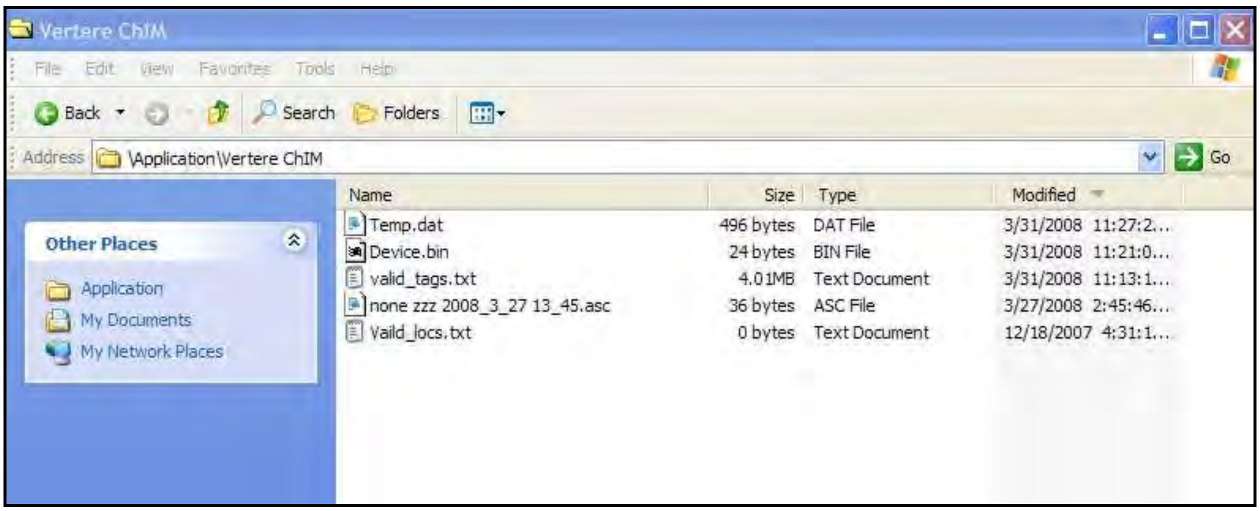
Report Example

Mount the MC-50 disk on the CD-Rom drive. Log on to Vertere Inventory Manager Client. Go to Reports\Inventory\Custom Reports. Navigate to D:\ Validation Reports\Valid_Tags.rpt. Open the report. A list of valid container barcode tags presents. Click on the export report icon (envelope with arrow).

Choose Format=Text and Destination=File. Click **OK**. Set pagination=0 (zero). Click **OK**. Accept 9 as characters per inch. Save the file to your desktop as Valid_tags.txt.

Copy the File.

Mount the MC-50 into the cradle. Activesync displays. Set up a guest partnership. Open My Computer. Go to Mobile Device\ My Windows Mobile-Based Device, continue on to application\Vertere ChIM. Choose Valid_Tag.txt



Go to *Activating Special Security Features* to set lookup for Item Tags.

8C. Installing Vertere Software on the MC3090, MC3190 and MC50

Overview

Use this document to complete an initial install or a reinstall of the software required to operate the MC3090, MC3190 or MC50 with the Vertere Inventory Manager Chemical or General Module. Contents of Vertere CD:

File Name	Description	Installation
ACTIVESYNC4_2\setup.exe	PC software for communication to Scanner	Install on PC
Resource software for Scanner:	**Vertere Software\Common Install Files**	
NETCFSetupv2.msi	Asp.Net compact format Version 2	Install on PC for transfer to Scanner
symbolmdk.reg	Support software for Vertere application	Copy from Vertere CD disk through Activesync to My Device\Application
symbolmdk.CPY	Support software for Vertere application	Copy from Vertere CD disk through Activesync to My Device\Application
symbol.all.arm.cab	Support software for Vertere application	Copy from Vertere CD disk through Activesync to My Device\Application
Vertere Software for scanner:	**Vertere Software\Chemical (or General\Fixed Asset)**	
15May07\Vertere ChIM.CAB	Chemical Module software for Scanner	Copy from Vertere CD disk through Activesync to My Device\Application
Vertere Chemical\ Device.bin	Resource file for Chemical Module Scanner software	Copy from Vertere CD disk through Activesync to My Device\Application\ Vertere ChIM
Vertere Chemical \ Valid_tags.txt	Resource file for Chemical Module Scanner software	Copy from Vertere CD disk through Activesync to My Device\Application\ Vertere ChIM
Vertere Chemical \ Valid_locs.txt	Resource file for Chemical Module Scanner software	Copy from Vertere CD disk through Activesync to My Device\Application\ Vertere ChIM
15May07\ Vertere General.CAB	Chemical Module software for Scanner	Copy from Vertere CD disk through Activesync to My Device\Application f
Vertere General \ Device.bin	Resource file for General Module Scanner software	Copy from Vertere CD disk through Activesync to My Device\Application\ Vertere General
Vertere General \ Valid_tags.txt	Resource file for General Module Scanner software	Copy from Vertere CD disk through Activesync to My Device\Application\ Vertere General
Vertere General \ Valid_locs.txt	Resource file for General Module Scanner software	Copy from Vertere CD disk through Activesync to My Device\Application\ Vertere General
Support Documentation and Reports		
Documentation	Scanner and Vertere User Guides	
Validation Reports	Crystal reports for Valid location and Item tag Values	Export to Ascii file *.txt , Copy to the to My Device\Application\ Vertere *\Valid_*.txt

INSTALLATION INSTRUCTIONS

The Motorola/Symbol units come with the Vertere Inventory Manager Chemical Module program already installed.

<u>WARNING</u>:
The unit must be fully charged before you attempt these procedures. The mobile computer has a built in power saver which means it will automatically switch off if left unattended for a period of time. Pressing any key on the keypad will restore power and screen display.

REQUIRED EQUIPMENT

Verify that you have the following equipment:

- fully charged Motorola/Symbol unit
- the unit's cradle
- USB cable
- Desktop PC with USB port
- access to the HANDHELD directory delivered with Vertere Inventory Manager, usually stored in C:\Program Files\Vertere.

Place the Scanner into the cradle and charge for 2 hours to top off the battery. (Omit charging if battery has adequate charge. To confirm battery level, tap Windows Flag (Start)\Settings\System (tab)\Power. Charge if less than 80 %.)

INSTALLATION INSTRUCTIONS (Continued) Installing Microsoft ActiveSync on your PC

The following section describes the steps required to load the data collection program on the unit.

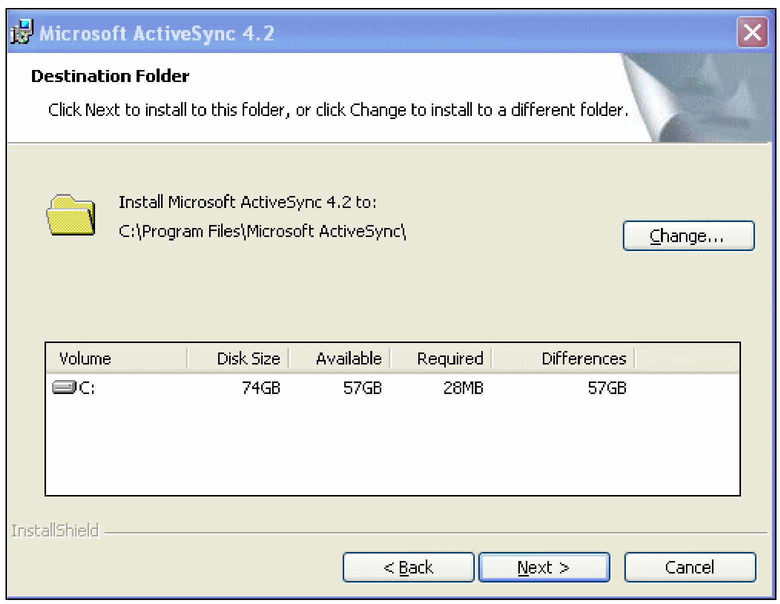
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Unpack the Cradle, Cable, AC adapter and Scanner.

Connect the Cradle to the AC adapter.

WARNING: Do NOT connect the USB cable to the Workstation USB port until Activesync is installed on the workstation.</td></tr>
<tr><td>2</td><td>Insert the CD that came with your unit into your computer's CD-ROM drive.</td></tr>
<tr><td>3</td><td>Click on Start then Run.

Click the Browse button. Look for the ActiveSync Install folder and the ACTIVESYNC4_2\setup.exe file. Click on setup.exe then Open.

Follow the on-screen instructions in the installation wizard to install ActiveSync on your workstation.


</td></tr>
<tr><td>4</td><td>Connect the cradle to your USB port.</td></tr>
</table>

INSTALLATION INSTRUCTIONS

Installing Microsoft ActiveSync onto the PC

(Continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Put the scanner into the cradle. The following screen displays. You do not want to establish a partnership, so choose “No” to set up the device as a guest.

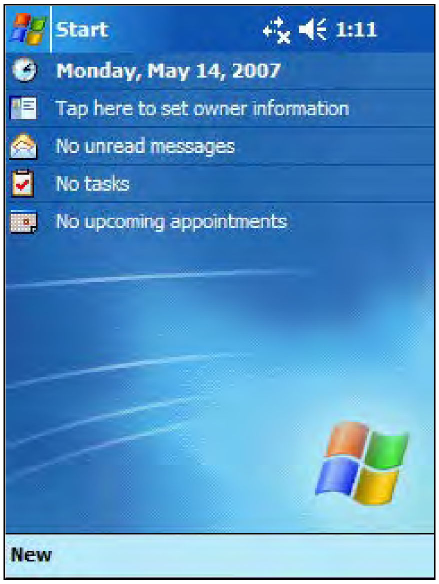

</td></tr>
<tr><td>6</td><td>Follow the on-screen instructions on the wizard to complete installation. Activesync completes the guest partnership. Leave the screen open to complete Step 2</td></tr>
<tr><td>7</td><td>On the ActiveSync screen, click on Tools, then Backup/Restore. On the Backup tab, click Back Up Now. This will create a backup file. This backup file will be used to restore the operating system.


</td></tr>
</table>

GETTING STARTED

The Symbol MC50 uses Pocket PC 2003 with the Windows desktop displayed on the display screen of the unit.

When the MC50 is switched on, the system defaults to the MC50 Windows desktop screen.



Setting Date and Time

It is important to set the correct date and time on your Symbol unit, as all data collection transactions performed with the scanner will use the date and time stored on the unit.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Pocket PC desktop, tap the Start icon.</td></tr>
<tr><td>2</td><td>Tap the Settings icon.</td></tr>
<tr><td>3</td><td>Tap on the System tab.</td></tr>
<tr><td>4</td><td>Tap the Clock & Alarms icon.

</td></tr>
<tr><td>5</td><td>Use the arrow keys on the on-screen calendar to choose the correct day for your Home clock. Tap to highlight the hour, minutes or seconds, then the up or down arrows to change to the current time, or use the keypad to enter the correct number.

</td></tr>
<tr><td>6</td><td>Tap the little OK button near the top right of the screen to return to the Control Panel, and then exit back to the Settings screen.</td></tr>
</table>

Software Installation – Chemical or General Module

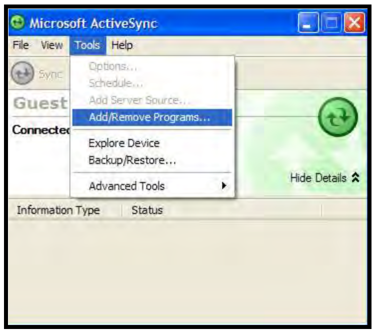
Complete Steps 1 – 2 for either the Chemical or General Module. If you are licensed for BOTH modules, complete these steps **one time only**.

Complete Step 3 to complete the Chemical Module installation.

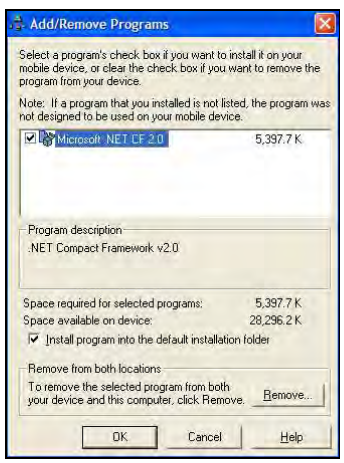
Complete Step 4 to complete the General Module installation

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
Install NETCFSetupv2.msi on the Workstation for transfer to the Symbol scanner through Activesync.

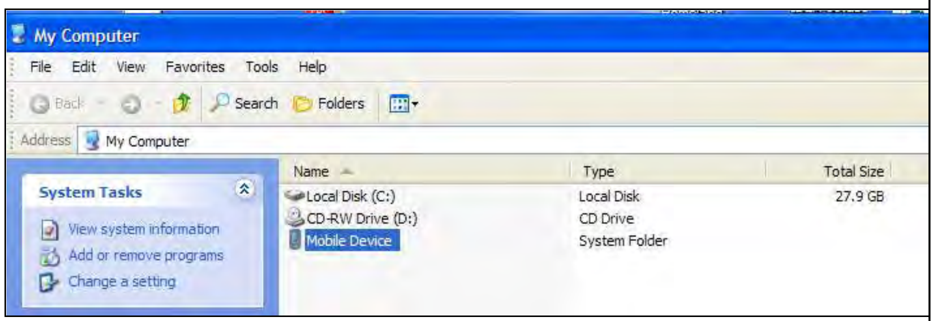
a. Choose **Tools\ Add Remove Programs**… from the Menu.

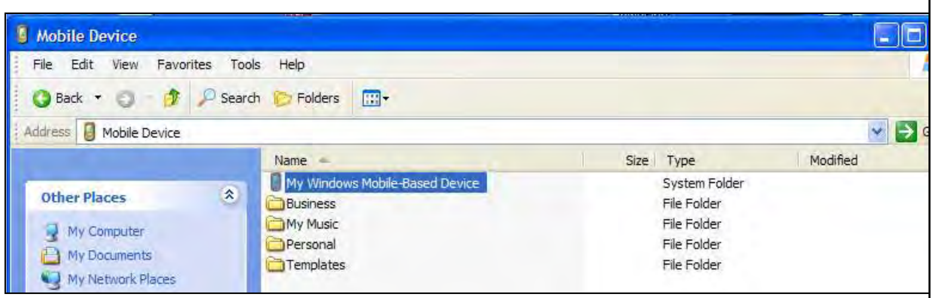


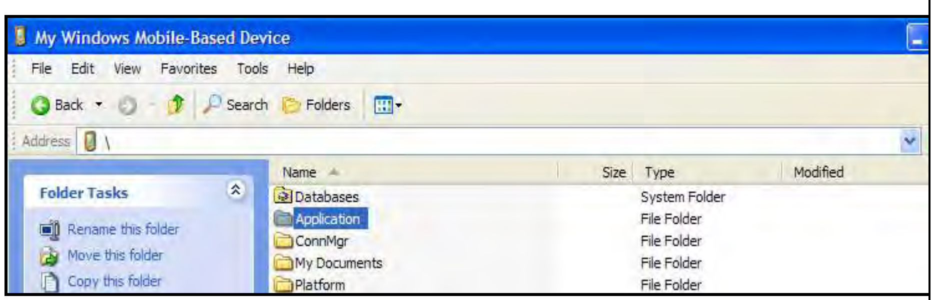
b. Check off the box for Microsoft .NET CF 2.0 then click on **OK** to install the ASP.Net Compact Format software to the scanner. Follow the on screen instructions to complete the installation.



</td></tr>
</table>

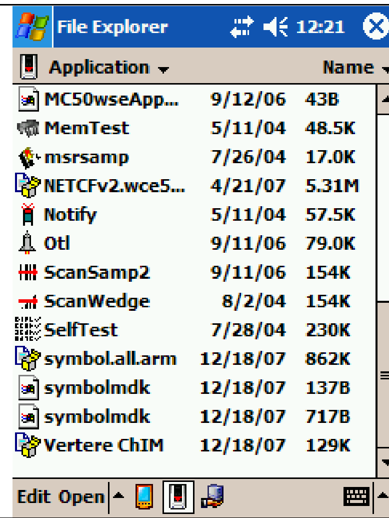
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>
Install Software onto the scanner.
a. Open My Computer on the desktop or the Start menu.
b. Open the CD drive to navigate to the Vertere Software\Common Install Files.
c. Highlight and copy these three files.
i. Vertere Software\Common Install files \symbolmdk.reg
ii. Vertere Software\Common Install files \symbolmdk.CPY
iii. Vertere Software\Common Install files \symbol.all.arm.cab
d. Open My Computer\Mobile Device. Follow the screens below to open the Application folder on the mobile device.


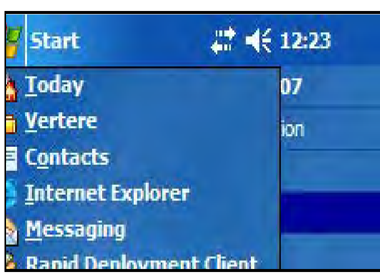




e. Paste the three files you copied in Step 2d into Application folder on the mobile device.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
Complete the Chemical Module software installation.
a. Open the CD drive to the Vertere Software\Chemical folder.
b. Highlight and copy the following file for the Chemical Module.
Vertere Software\Chemical\15May07\ChIM.CAB
c. Paste the file into Application folder on the mobile device.
d. Turn your attention to the Symbol scanner in the cradle. With the stylus in hand, tap the Windows icon (Microsoft flag) in the upper left corner, and then tap Programs.

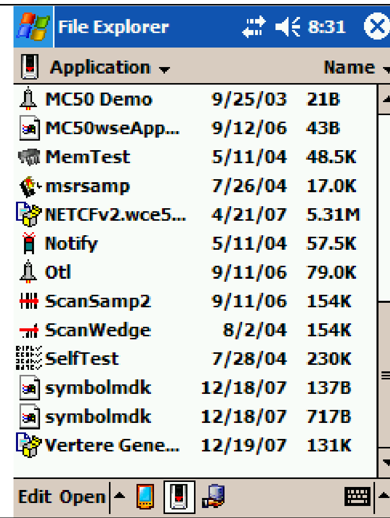



e. Choose File Explorer (left image) and Navigate to the Application folder (right image). Tap the symbol.all.arm file and Vertere ChIM files in succession to complete the installation.
f. Tap the Windows icon, and then tap Vertere to open the Vertere ChIM folder. Tap the icon to run the application. Click ok to any messages.
g. Close the application by tapping the X in the upper right corner. This process creates the folder necessary to complete installation.


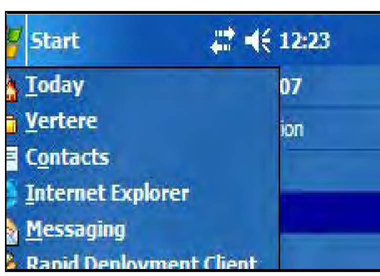
h. On the workstation, open the Vertere CD to Vertere Software \ Chemical\Vertere Chemical folder. Copy the three files in the folder. Paste the files onto the Symbol scanner by navigating to My Device\ Application\ Vertere ChIM.

The Vertere Chemical software is now installed on the scanner. Read the ‘Vertere Inventory Manager User Guide’, Section 8B - Symbol MC50 _v1_Chemical.pdf, in the Documents folder for detailed instructions on using your new software.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
Complete the General Module software installation.
a. Open the CD drive to the Vertere Software\General folder.
b. Highlight and copy the following file for the General Module.
Vertere Software\General\15May07\General.CAB
c. Paste the file into Application folder on the mobile device.
d. Turn your attention to the Symbol scanner in the cradle. With the stylus in hand tap the Windows icon (Microsoft flag) in the upper left corner, then tap Programs.



i. Choose File Explorer (left image) and Navigate to the Application folder (right image). Tap the symbol.all.arm file and Vertere General files in succession to complete the installation.
j. Tap the Windows icon, and then tap Vertere to open the Vertere General folder. Tap the icon to run the application. Click ok to any messages. Then close the application by tapping the X in the upper right. This process creates the folder necessary to complete installation.



k. On the workstation, open the Vertere CD to Vertere Software\Chemical\Vertere General folder. Copy the three files in the folder. Paste the files onto the Symbol scanner by navigating to My Device\ Application\ Vertere General.
The Vertere General software is now installed on the scanner. Read the 'Vertere Inventory Manager User Guide', Section 8B - Symbol MC50 _v1_General.pdf, in the Documents folder for detailed instructions on using your new software with the General Module.
</td></tr>
</table>