

Vertére Inventory Manager -Enterprise Edition

User's Guide

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APPENDIX A – PHYSICAL INVENTORY WITH VERTERE INVENTORY MANAGER

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
ManagerWe encourage you to visit www.Vertére.com
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 This section explains basic system design, navigation and general guidelines for all users. Audience

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.

Configuration	Software	Special Functions	Benefits
Enterprise Core	MS SQL 2005	Barcode printing, importing	Secure access and control for all
Database	ASP.NET 4 or	data from portable barcode	modules through local browsers.
	later	readers, running custom	5
		reports, physical inventory	Supports multi-organization
		and reconciliation fully	installations with organization-
		supported.	specific setup options.
			-h
		Supports multiple business	Reduces cost of implementation.
		units or organizations.	·
		0	Reduces cost of system support—
		Licensed by organization,	no workstation requirements; all
		module, and organization	program data on one server.
		concurrent users.	
General Module		Item-level control of	Uses existing locations, users and
		equipment, animals, etc.	groups.
(can be upgraded to			
Fixed Asset Module)		Enhanced fixed asset	Capital asset option with split
		module to support asset	account options and monthly or
		ageing, depreciation, and	annual depreciation.
		financial reporting.	
Chemical Module		Chemical physical, safety,	 Container-level chemical control
		regulatory data shared	for each organization.
		among all organizations.	 Reduces data entry.
			 Ensures consistent reporting,
			safety, regulatory, physical data.
Biological Module		Biological sources,	Control for biological items
		attributes, safety,	including bio-safety levels 1-4
		regulatory data shared	
		among all organizations.	
Requisition Manager		Shopping cart to allow end	Filters against chemicals of interest
		users to request items	lists and speeds new record
		from catalog, inventory or	creation when orders are received
<u> </u>		supply center.	
Supply Module		Requisition and stores	Supports multiple storerooms within
		perpetual inventory: order,	each organization; filters
		receive, withdraw, bill,	requisitions against organization-
		cycle counts.	defined lists.

Table 1. Enterprise Options

Organization Organization Control

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.

Organization Selection						
Select Organization International University						
	GDI					
	International University					
	John Smith University					
	Prince University					

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.



The Inventory Manager is delivered with one user, the System Administrator (or Super User). Startup The System Administrator has access to all organizations and is assigned all available rights within Users the system. The Inventory Manager takes advantage of barcoding, a proven method recommended but not Barcoding required, for identifying inventory items and their locations. During the initial inventory, users can **Options:** 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. On demand • Pre-printed Users can print barcode tags on demand or use preprinted tags to reduce the requirement for None 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 To advance through data entry fields, use the **[Tab]** key. in the To activate a Search, enter at least one criterion and press [Enter]. Inventory Manager **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.

GDI		Chemical	: Add						MESSAGES	(0) LOGOF	F ADMINISTRATOR
Home	Search >				\sim						
Chemical 🔻	Search	Query Tool									
Add	Inventory Cat	alog Search - Che	mical : Add					Search By :-	Catalo	a O Svr	ionym
View/Update	a						Stock				
Restore	Cnem Name	IS 🔻					Number				Search
Catalog 👻	Manufacturer					•	Product No.				Clear
Physical Inventory	Vendor					-	Amount	U-G	D-M		Catalog Add
Download Reconcile	CAS#			Active	All	-					
Reports											
Setup 🔻											
Settings											
Tags											
Locations 🔻											
Users/Groups											
Categories											
Vendors -											
Roles/Rights											
States/Countries											
Accounts											

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.
- **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 containerlevel 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.

51 1	
Prompt	Meaning
* Barcode #	Asterisk preceding a field: The * denotes a field that your
barcoac	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, M, 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: the Catalog records for which you have inventory
Active All	Active: the catalog records for which you have inventory.
All	chomicals on organization or not
Yes	Vec – displays or searches only those catalog records that represent
No	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.
	Replace the barcode number assigned to an item with a new
<u>C</u> hange Tag	number.
0	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.
æ	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
Sn2	

Special Use: The following prompts have special uses.

Use	То
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

MenuOptions(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.

Home		
Chemical	Home	Home >
Add	System 👻	
View/Update	Administration	
Restore	Audit Log	
Catalog 👻	Service Setup	
Physical Inventory	Change Password	
Download Reconcile	User Management	
Reports	Change Organization	
Satun 👻	Verify Catalog	
Settings	My Account	
Taga	Add/Edit Organizations	
Tays	License Info	
Locations -	About Us	
Users/Groups		
Categories		
Vendors 🔻		
Roles/Rights		
States/Countries		
Accounts		

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 Search and Query Tools

Query

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.

Search Query To	ool Scan Tag												
Find Items That Match Th	nese Criteria - Chemical: Vi	ew/Update								Search By :-	 Catalog 	O Sj	nonym
Barcode #	-] PI								▼ Search
Location				÷	Group								▼ Clear
Product Name	Contains 💌 formald	ehyde											
CAS#			View	Länk.	Ch	emwatch MSDS	3	Calculate	Tare				
Multi Edit	Transfer		Disp	oose		Change Tag		Change Ca	talog I	Export 🛐			
Select All Resu	ilts 1- 25 of 379	Total F	Pages 16	_	_	Firs	t Prev	Go	to Page	1	Next	_	Last
1	Product Name	Barcode #	Location	In Lab location	QTY	Amount Remaining	U-0-N	A Stock	CA	S# PI	Group	PO Number	Account Storage Linked
CON PARAFORM	ALDEHYDE E) AQUEOUS SOLUTION	MF8748	RGN1464	Shelf 6	1.00	10.0000 n	h			Antonova,Raisa	Schlossmacher group		
C 20% PARAFORM	ALDEHYDE E) AQUEOUS SOLUTION	MF8749	RGN1464	Shelf 6	1.00	10.0000 n	h			Antonova,Raisa	a Schlossmacher group		
C 20% PARAFORM	ALDEHYDE E) AQUEOUS SOLUTION	MF8750	RGN1464	Shelf 6	1.00	10.0000 n	il.			Antonova, Raisa	Schlossmacher group		
🗌 🦸 FORMALDEHYDE		AA3161	DRO328 Solvents Fumehood	B2-39	1.00	473.0000 n	ıl		50-00-	0 Kumar.Kaveer	Pratt's group		Texic cabinet
		AF2268	CRG322		1.00	1.0000 L			50-00-	0 Brown,Gabriel	Drouin group		Toxic cabinet

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.

Search	Query Tool					
Inventory Cata	log Search - Chemical Module			Search By :-	Catalog	O Synonym
Stock Number	l	Manufacturer		SUPPLIER		Search
Product Name	ls 💌	Active	All			Clear
Product No.		CAS#				

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)

		Chemical: View	w/Update	HELP LOGOFF
Search >				
Search Query T	ool Scan Tag			
Find Items That Matc	h These Criteria - Chemical: View/	/Update	Search By :- 💿 Catal	log 🔘 Synonym
Barcode #		Current User		Search
Location				Clear
Chem Name	Is 🔽	Export To	PDF Format	Print
CAS#	View	Link Chemwatch MSDS	Calculate Tare	

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.

				Chen	nical: View/Update	HELP LOGOF
Search	>					
Searc	ch Query Tool	Scan Tag				
Find Ite	ems that match these	e criteria - Che	mical: View/	Update		
Field	Lot Number	~	Condition	Contains	Value	Add
			Click	Contains		Update
				Is Exactly		Delete
				Starts With		Clear
						Search

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 Query To	Search Query Tool Scan Tag							
Find Items That Match These Criteria - Chemical: View/Update Search By :- 📀 Catalog 🔿 Synonym								
Barcode #			PI	Wolczanski Pete	\mathbf{v}	Search		
Location	273 S.T. Olin	~	Department	Chem and Chem Bio		Clear		
Chem Name	Is 💙		Export To	PDF Format		Print		
CAS#		View Link	Chemwatch MSDS	Calculate Tare				
Multi Edit	Transfer	Dispose	Change Tag					

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 Scan Tag

Query (continued)

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.

			C	Chemical: View/Update	HELP LOGOFF
Search >					
Search	Query Tool Scan	Tag			
Add Scan Tags a	nd Find Items with those :	scan tags			
Enter Tag					Add
Enter Tag	1	Item Tag		Item Description	Add Delete
Enter Tag	CZ0848	Item Tag	BUFFER SOLUTION 4.00	Item Description	Add Delete
Enter Tag Select Select	CZ0848 DA0515	Item Tag	BUFFER SOLUTION 4.00 BUFFER SOLUTION 4.00	Item Description	Add Delete Clear



System System Administrator

Management Tasks 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 Store Manager

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

Tasks

- 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.

Overview System

Security

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.

User Name and Password

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.

Organization Control for Change Password Rules

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

Roles

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.

Organization Restrictions

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

Chemical and User Security Levels

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.

Group Security

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.
<i>Getting Started</i>	 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)

VERTÉRE Inventory Management System	
	Login
	User ID
	Convrint @ 1996.2007 AT/SCAN Ltd. d/b/a vertére
	oppright of Tourisour Annophin stationary renote

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 Change Password

First Time 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.

SystemOrganization ManagementAdmin TasksOrganization Creation(continued)'Organizations' are the individual

'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.
	earch Sites > Search Sites Create a Site
	Search Sites
	Name Main Phone Attress
	City Fax
	Country Email
	State/Province Active Postal Code Search Clear
	Search Organizations Option
	Enter a value in one on more fields and slick C assach to view on evicting
	Enter a value in one or more fields and click Search to view an existing
	and inactive
	and mactive.
	Click Create an organization tab to add a new organization
2	The Create an organization form will display
Z	The create an organization form will display.
	Create a Site >
	Search Sites Create a Site
	Vreate a site Name Main Phone
	Address Alt Phone
	City Fax Country Email
	State
	Postal Code Save Clear Cancel
	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.

To edit an organization record,	complete the following steps.
---------------------------------	-------------------------------

A	a	m.	in	1 č	<i>as</i> i	K.
(C	on	ti	nu	ec	I)

System Admin Tasks	To edit a	an organization record, complete the following steps.							
	Step	Your Action							
(continued)	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 Sites Create a Site								
			Search Sites						
		Name	Main Phone						
		Address	Alt Phone						
		Country	Final Final						
		State/Province	Active						
		Postal Code	Search Clear						
		Searc	h Organizations Results Active and Inactive Organizations						
	3	Click the edit icon to o click Update .	lisplay details for a single record, complete your edits, and						
		Search Sites Edit Site							
		Name Mid-East University	Edit Site						
		Address	Alt Phone						
		City East Riverdale	Fax Fax						
		Country Canada	Email Email						
		State	Active						
		Postal Code							
			Update Clear Cancel						
			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 To provide the <u>initial</u> license for an organization, add one or more organizations then complete the following steps.

(continued)

Step	Your Action									
1	Choose the Change Organization option from the Home menu. Select an organization from the drop down menu.									
	Site Selection									
	Select Site									
	Save Queen's University Royal Military College Université d'Ottawa									
2	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.'									
3	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.									
	License Information									
	Enter License Key									
	Add Cancel									
	License Preview									
	Number of Concurrent Users : 0									
	General Module Supply Module									
	Chemical Module Radioactive Module									
	Biological Module									
	Please supply a license key or call Vertére – 1.800.628.9917.									
4	The system will display the license parameters for the organization; click Continue to exit the system and activate the license.									
	License Information									
	Enter License Key									
	Continue Cancel									
	License Preview									
	Number of Concurrent Users : 2									
	General Module Supply Module									
	✓ Chemical Module 🛛 Radioactive Module									
	Biological Module									
	Licensed version DFTKN-MLIZO-YVJS8-UIW8W-KSJT8-Q8B									
	License key updated successfully.									

System Organization Admin Management

Admin Tasks Defining the Initial Organization Administrator

(continued) 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:

Message	from webpage	x
1	There is currently no Site administrator associated with the Site you have selected. Please create a Site administrator to contin	nue.
	ОК	

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 Defining Password Maintenance Rules

Setup 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 Change Rule							
Apply Rule For	Super User 📀	Site Administrator 🔾	All Other Users 🔾				
Allow User(s) To Change Password? 🗹							
User(s) Must Change Password After Never 😪 Days							
Can Rotate Password 🗹							
	Save	Clear					

'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.

Password Maintenance

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.

Cc	onfiguration	
Records/Page SMTP Setti	ngs	
Records/Page In Search Result	25	(Recomended 15)
Records/Page In Report	500	(Recomended 500)

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	Records/Page SM	TP Settings	5			
Aumin Tasks	SMTP Server					
(continuea)	SMTP Username					
	SMTP Password					
	SMTP Authentication Method		Anonymous(or nor	ne) 🔿 Basic 💿 N	TMLO	
	SMTP Enable SSL					
	ALERT					
	Verify any new settings with your Server Administrator before making any changes to this SMTP information.					
			Save			

System Configuration

Organizatio About 'Organization' Administrators

n Ādmin Tasks 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.

Organizatio Module Specific Settings

n Setup Menu Options

n Admin Tasks (continued)

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 <u>each module</u>. 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.

BITE: MID-EAST UNIVERSIT	Y			Chemical: Setting	s	280, 11 H H H H H H	LOGOFF	ADMINISTRAT
Rome	Create System Variable	es						
Chemical 🔻	Company Name	Mid-East Univers	ity	Currency Format	\$X,XXX.XX	Date Format	MM/dd/yyyy	v
Add	Inventory Name	Chemical Invento	ну	Language	English	Fiscal Year Begins	05/01/2009	
View/Update		Part of the second seco			Enable Crow	n Canualtu 2		Cauc
Restore			Enable Group securi	ly i	that mable Group	p security 2		Java
Catalog 🔹				Custom sett	lings			_
Physical Inventory	System Tables	Customized Screens	Tag/ID Mask Setup	ChIM Access				
Download Reconcile	Create Coded Table							
Reports	Select Coded Table				Table Entries			
Setup *	Acquisition Type		×	>>	Purchase via PC Purchase via st) ores	8	
Settings	Add Table Entry			Update	Transferred			
Tags	Custom Code (Optiona	d)		Delete				
A STATISTICS				Clear				
Locations								
Locations Users/Groups								
Users/Groups	_							
Users/Groups Categories								
Locations Users/Groups Categories Vendors								

Chemical Module Setup/Settings Options

n Ădmin	Use	То
Tasks (continued)	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.

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

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 preprinted 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.

Auto-Generate Tag Numbers – 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, for example:

	Masks	Starting Value	е	
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.

####	0001
######	000001
######	000001
######	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.

<u>Turning off the Field Mask</u> – 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.

<u>Changing the Auto-generation Starting Value</u> – 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)

Custom Settings						
System Tables	Customized Screens	Tag/ID Masł	< Setup	ChIM Access		
Select Field Acquisition Type Note: Although you may enter more than 15 characters for custom prompts, it is recommended that you limit all prompts to 15 characters or less. Tool tips may have upto		 Field is required to complete form Disable field on all forms Custom Prompt Acquisition Type Custom Tool Tip How item was acquired 				
Custom Field Test Acquisition Type	Purchase (1)			Previ	ew Save	✓ Make Default

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.

		Ch	emical: Catalo	g: Edit		HELP LOGOFF
Search > Edit Cat	alog					
Item Data	Chem Info Gateway					
Inventory Catalog Entry - Chemical Module Search By :- 💿 Catalog 🔿 Synonym						
* Chem Name	ACETONITRILE	<u>^</u>	Stock Number	A3396-25ML	Product No.	A3396
QTY	0 Unit of Purchase	~	Vendor	SIGMA 🗸	Manufacturer	~
* Amount	25.00 * U-O-M ml (ml)	*	Max Onsite Container		Grade	minimum 99.5%
Container Type		~	State	~	Purity	
CAS#	75-05-8		MSDS REF		MSDS On Site	
Category Membe	er 📃 😼		Security Level	1 🗸	Use Last Enter	ed

Chemical Module 'Item Size' Field Label Customized as 'Amount'
Organization Customizable Field Labels

Admin Tasks (continued)

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.

Customized Screens	Shared - Catalog Field Use	Reserved			
CAS Number	CAS Number Chemical Abstracts Service registry number (12 characters) entered with or without formatting dashes; stored as xxxxxxx-xx-x. Chemical Module only				
Category Member	Members of a defined classification; sub designation; each catalog records can be linked to a single category member.				
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			

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

	Chemical: Catalog: Edit							
Search > Edit Cata	alog							
Item Data	Cher	m Info Gateway						
Inventory Catalog	g Entry - Che	emical Module			:	Search By :- 🤇	Catalog O Synonyn	n
* Chem Name		ACETONE			Stock Number	270725-1L	* Product NO	270725
Quantity		0	Unit of Purchase	×	Supplier	Aldrich Chemi 💙	Manufacturer	·
* Amount		1.00	* U-O-M	L (L) 💙	Max Onsite Container		Grade	99.9+%
Container 1	Гуре	Glass Bottle (M)		*	* State	Liquid (6) 🔽	Purity	
CAS#		67-64-1			MSDS REF			MSDS On Site
Category Me	ember			~	Security Level	1 🗸	Use Last Entered	
Notes								
				<u>~</u>				
				~				

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;

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

Table 3. Container Field Description	s (bold identifies	recommended minimum	values)
--------------------------------------	--------------------	---------------------	---------

Item Add Notes		Item being adde	d: <u>Toluene</u>	
Parent Tag	Amount Remaining			
* Barcode #		Untagged	* Receive Date	04/10/2011
Location	-	£	PO Number	
РІ	· · ·	8	Old Barcode	
roup			Custom Text 2	-
ab Contact	×		Lot Number	
Use	Research		Opened Date	
Status		1	Expiration/Review Date	
Acquisition Type]	Disposal date	
YT	1 Unit Co	ost	Custom Lookup 1	~
Init	2.5000 Custom Lookup 2	[V	
Amt Rem/Tare)	2,5000 Cost Centre		Container Type	*
State	Dens	ity	0.67	Refillable

Sample of Customized Container Fields

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

Table 4.	Sam	ple Labels	and T	ool Ti	ps for	Container	Values	(bold =	recommended	required	l values)
----------	-----	------------	-------	--------	--------	-----------	--------	---------	-------------	----------	-----------

OrganizationCustomizable Labels for Physical Properties ValuesAdmin TasksThe only values that are user definable on the physical properties form are shown in the
following table.

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

Table F	Field Decerimtic	na fan Custansi-ahl	- Dhusiaal Dra	neutice Chemical Tab
Table 5.	Field Descriptio	ins for customizabl	e Physical Pro	perties – chemical lab

Physical / Chemical P	Physical / Chemical Properties									
*CAS # 6	37-64- 1	* Chem Name	ACETONE					Master ID	33586	
Physical		Chemical	Health H	lazards						
Formula		C3H6O			Molecular Weight	54	3.08			
Chemical Class				~	* Other Class					~
Incompatabilities					Storage Req.	R	ed, Solv	rent		*
NFPA		HMIS								
Health	1		~							
Flammability	3	ŀ	~							
Stability	0		~							
Special			~							
	BOCA	Display								

Physical Properties Chemicals Tab Form

Organization Admin Tasks (continued)

on 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.

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	
Тохіс	Тохіс	
Unstable / Reactive	Unstable / Reactive	
Water Reactive	Water Reactive	
IBC_cust1, 2 and 3	Optional custom fields for additional fire code hazards	

Search > Chemical Catalog Update > Regulatory Data					
Regulatory Data					
CAS# 50-00-0	*Chem Name F	DRMALDEHYDE			
Regulatory Data IBC	Canadian Regulations				
Combustible Dust		*	Organic Peroxide	×	
Combustible Fiber		*	Oxidizer	×	
Combustible Liquid		*	Other Health Haz	×	
Compressed Gas		*	Peroxide Former	×	
Corrosive		*	Pyrophoric	~	
Cryogen		*	Radioactive	×	
Explosive		*	Sensitizer	~	
Flammable Gas		*	Toxic	×	
Flammable Liquid		*	Unstable / Reactive	~	
Flammable Solid		*	Water Reactive	×	
Highly Toxic		*	IFC_cust1	~	
Irritant		*	IFC_cust2	×	
LPG		*	IFC_cust3	×	

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.

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
НАР	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
РСВ	Substance is designated as a Polychlorinated biphenol	Yes
ОНН	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

Table 7. U.S. Regulatory Field Descriptions

Search > Chemical	Catalog Update > R	egulatory Data			
Regulatory Data					
CAS# 67-64-1	*Chem Na	ACETONE			
Regulatory Data	IBC Canadian F	Regulations			
EPA	Carcinogen	DOT	Local Reg	s Health/Saf	ety
CAA TQ		RQ CERCLA	5,000	X11 Acute	
TPQ		НАР		X11 Chronic	
RQ 313		PCB		X11 Fire	
TSCA	 Image: A start of the start of	Sec 304 RQ		X11 Pressure	
Waste Id	U002	Waste code		X11 Reactive	
ODS					

EPA/OSHA Tracking Requirements

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
МАК	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

Table 8. Regulatory Data – Carcinogen Ratings Field Descriptions

<u>Search</u> >	Search > Chemical Catalog Update > Regulatory Data						
Regulato	ry Data						
CAS#	AS# 50-00-0 *Chem Name FORMALDEHYDE						
Regulate	ory Data	IBC	Canadian Reg	julations			
E	PA	С	arcinogen	DOT	Local Regs	Health/Safety	
OSHA					мак		~
IARC			Class 2A		ACGIH		~
NIOSH					VTP		~

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

Search > Chemica	I Catalog Update > Reg	ulatory Data			
Regulatory Data					
CAS # 67-64-1	*Chem Name	ACETONE			
Regulatory Data	IBC Canadian Reg	gulations			
EPA	Carcinogen	DOT	Local Regs	Health/Safety]
Ship name	ACETONE	DOT			
Class	3		PG	II	
Labels			UN NA Number		

Carcinogen Ratings

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

Table 10. Regulatory Data - Local Regs

Search > Chemical C	Catalog Update > Reg	ulatory Data			
Regulatory Data					
CAS # 67-64-1	*Chem Name	ACETONE			
Regulatory Data	IBC Canadian Reg	gulations			
EPA	Carcinogen	DOT	Local Regs	Health/Safety]
Local 1 RQ			Local Re	gs¦al 1	Local 2
Local 2 RQ			_ _ı	.ocal 3	Local 4
CA			✓ ✓	A	🗹 FL
NJ				AN	UN 🔽
EINECS	200-662-2			PA	MN MN

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.

Search > Chemical Catalog Upda	ate > Physical Chemical Propertie	S			
Physical / Chemical Properties					
CAS# 50-00-0	* Chem Name	BUFFER SOLUTION 4.00		Master ID	25671
Physical	Chemical	Health Hazards			
Check / Uncheck All					
Auto Nervous System	Bladder	Blood	Bones		ardiovascular System
Central Nervous System	Eye	G.I. System	Heart	Пк	üdney
Liver	Lungs	Mucus Membrane	Pancreas	P	rostate
Respiratory System	Skin	Thyroid	Lachrymator	- N	lutagen
Health Hazard_cust1	Health Hazard_cust2	Health Hazard_cust3	Health Hazard_cust4	R	eproductive Toxin
Teratogen					

Customizable Labels for Canadian Regulations

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

egulatory Data
AS# 67-64-1 *Chem Name ACETONE,CERTIFIED ACS
legulatory Data IBC Canadian Regulations
ederal Provincial TDG
nemical Warfare Convention(CWC)
hedule
Controlled Goods
mestic Substances List Categorization
Echological Categorization
Persistent,Bioaccmulative and inherently toxic to the environment(PIT)
Persistent and inherently toxic to the environment(PIT)
Bioaccmulative, and inherently toxic to the environment(BIT)
Human Health Categorization Criteria
Priorities of Human Health

Chemical Warfare Convention (CWC) Ratings

Regulatory Data IB	C Canadian Regulations	
Federal Provincial	TDG	
Local1	Local3	AB
Local2	Local4	BC
Local 1		МВ
Local 2		NB
		NT NT
Prop65	×	NS
Prop65	16-Feb-09	NU
		ON
EINECS		PE
		QC
		🗌 SK
		□т

Provincial	Ratings
------------	---------

Search > Chemical Catalog Update > Regulatory Data						
Regulatory Data						
CAS # 50-00-0	*Chem Name FORMALDEH	YDE				
Regulatory Data IBC Ca	anadian Regulations					
Federal Provincial TDG						
Ship Name]				
Primary Class	~	Division	×			
Subsidary Class	✓	Division	▼			
UN]				
PG]				
RG]				

Transport of Dangerous Goods Ratings

ADD US REGS TEST SPEED ON STEPPING BACK

ChIM Access

Organization Admin Tasks (continued) 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**.

System Tables	Customized Screens	Tag/ID Mask Setup	ChIM Access	
✓ Alert BOCA out of compliance ✓ xpiring Chemicals Incompatible Storage		V Mixture Radioad Recipe V Refillab Requis Sourcir V Enable Display Am	Tracking live Decay Aanagement e Containers ions J Ganadian Regulations Tab	g out to 4 🛛 Y decimal places.
Cost Tracking		Tare	Veight Calculations	Crams C Kilograms

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.

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.

То	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.

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)	СС
	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.

Tag Template Management	Batch Printing	Booklets	Reserve Tags		
Existing Templates					
Templates Unavailable					
New					

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.

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.

🖬 Tag Print		×				
	Template					
Template	Cornell Chemistry Inventory Tag	*				
Template File Name	15_5_5.btw					
	Printer					
Server Printer Name		~				
Client Printer Name Copies	Microsoft XPS Document Writer Zebra Stripe 400 Zebra TLP2844-Z					
	OK Cancel					

Organization and Module-specific Inventory Template

Tag Templates

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

	Edit Te	mplate		
Label ID				
Label Class	Inventory 🗸			
Label Size	1.5 X 0.50			
Description*	Cornell Chemistry Inventory Tag	\sim		
Ochoose a te	emplate file	O Upload a new template file		
15_5_5.btw 15_5_Group.bt 15_5_Location. 15_5_tag.btw	w .btw	Browse Overwrite if file exists File extension must be .btw		
SQL Statement	15_5_5.btw SQL	New SQL Statement		
SELECT INV_ITEMS.SYS_TAG, INV_ITEMS.POST_DATE,INV_CATALOG.CTLG_DESC FROM INV_ITEMS INNER JOIN INV_CATALOG ON INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID				
	Reset Sa	ve Cancel		

Completed Inventory Tag Template

Organization Adding a Tag Templates

Admin Tasks (continued) 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.

Action							
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 $15_5 = 1.5" \times .5"$ labels. The third set identifies the sample number. Use these numbers to select the correct SQL code in step 2.							
Open the formats. name. Se code usin design yo	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.						
At the System option.	stem – Tags windov	N, USE	e the Tag Ter	mplate Man	nagement		
Tag T	emplate Management	E	Batch Printing	Booklets	Reserve Tags		
		Existing	Templates		Reserve Tags		
	Description			Templa	te File		
🖉 Cornell Cher	mistry Group Label		1	15_5_5.btw	×		
💋 Cornell Cher	mistry Inventory Tag			15_5_5.btw	× .		
				15_5_User.btw			
🖉 Cornell Che	mistry User Tag		1	15_5_User.btw	×		
Cornell Cher	mistry User Tag	1	New	15_5_User.btw Existing	Tag Template		
<pre>2 Cornell Cher a. C</pre>	mistry User Tag Flick New on the Ex	isting	New	Existing	▼ Tag Template		
a. C	ilick New on the Ex	isting	Templates v	Existing vindow.	Tag Template		
Cornell Cher a. C	ilick New on the Ex emplate Management	isting	Templates v	Existing Vindow. Chemical: Ta Booklets	⊠ n <i>Tag Template</i> ngs Reserve Tags		
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Cornell Cher a. C Tag T Label ID Label Class	ristry User Tag	isting Add Te	Templates v latch Printing	Existing Vindow. Chemical: Ta Booklets	⊻ <i>Tag Template</i> Igs Reserve Tags		
Cornell Cher a. C Tag T Label ID Label Class Label Size	Template Management	isting Add Te	Templates v latch Printing	Existing Existing Vindow. Chemical: Ta Booklets	IS Reserve Tags		
Cornell Cher a. C Tag T Label ID Label Class Label Size Description*	Template Management	isting Add Te	Templates v	Existing Vindow. Chemical: Ta Booklets	Tag Template		
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Cornell Cher a. C Tag T Label ID Label Class Label Size Description* Choose a 15_5_1_2844 15_5_5.btw 15_5_Locatio	Template Management	isting Add Te	Vew Templates v Ratch Printing emplate	Existing Existing vindow. Chemical: Ta Booklets emplate file e exists tension must be	Tag Template		
Cornell Cher a. C Tag T Label ID Label Class Label Size Description* Choose a 15_5_1_2844; 15_5_Coroup. 15_5_Location SQL Stateme	remplate Management	isting Add Te	Vew Templates v Iatch Printing emplate Upload a new t Overwrite if fil File ex Nev	IS_S_User.btw Existing vindow. Chemical: Ta Booklets Booklets eexists template file e exists tension must be r SQL Statement.	Tag Template		
Cornell Cher a. C Tag T Label ID Label Class Label Size Description* Choose a 15_5_1_2844 15_5_Schw 15_5_Locatio SQL Stateme	ilick New on the Ex emplate Management template file Z.btw btw m.btw	isting Add Te	Vew Templates v latch Printing emplate Upload a new t Overwrite if fil File ex New	IS_S_User.btw Existing vindow. Chemical: Ta Booklets emplate file e exists tension must be r SQL Statement.	Tag Template		
 Cornell Cher Cornell Cher Carag T Tag T Label ID Label Class Label Size Description* Choose a 15_5_1_28442 15_5_Shtw 15_5_Location SQL Stateme 	ilick New on the Ex emplate Management template file Z.btw btw m.btw	isting Add Te	New Templates v Ratch Printing mplate Upload a new t Overwrite if fil File ex Nev	IS_S_User.btw Existing vindow. Chemical: Ta Booklets emplate file e exists tension must be v SQL Statement.	I Tag Template		

AUIIIII I ASKS	r	
(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 dron 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.
		 Type the SQL statement into the statement neid. Click Save
		To unload 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.
		Add SQL for BarCode Printing X
		SQL Statement for BarCode Printing
		Statement Title Chemistry Inventory Tag
		SQL Statement SELECT INV_ITEMS.SYS_TAG,
		INV_ITEMS.POST_DATE,INV_CATALOG.CTLG_DESC FROM
		INV ITEMS INNER JOIN INV CATALOG ON
		INV ITEMS INV CAT ID = INV CATALOG INV CAT ID
		INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID
		INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID
		INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID
		INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID V Save Cancel
		INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID Save Cancel
		INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID Save Cancel SQL Statement
	4	INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID Save Cancel SQL Statement If the label format is valid, a message will display advising you that the format
	4	INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID Save Cancel SQL Statement If the label format is valid, a message will display advising you that the format has matching values in the database. Click OK.
	4	If the label format is valid, a message will display advising you that the format has matching values in the database. Click OK . To test the format, either add a new inventory record and click Print Tag
	4	INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID Save Cancel SOL Statement If the label format is valid, a message will display advising you that the format has matching values in the database. Click OK. 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
	4	If the label format is valid, a message will display advising you that the format has matching values in the database. Click OK . 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 is the target
	4	If the label format is valid, a message will display advising you that the format has matching values in the database. Click OK . 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.
	4 5 6	INV_ITEMS.INV_CAT_ID = INV_CATALOG.INV_CAT_ID Save Cancel SQL Statement If the label format is valid, a message will display advising you that the format has matching values in the database. Click OK . 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. You can print more than one copy of a label.

Organization Steps to add label templates, continued.

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'

 \checkmark Use regional settings when outputting currency, numbers, dates and times.

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 onorganization 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.

CURRENT RIGHTS

Add Biologicals Add Inventory Age Inventory Approve Requisitions Batch/Booklet Printing

Change Tag **Biological Module Biological Verify** *Calculate Depreciation Chemical Verify ChIM Module Create and View Reports Create Store **Dispose Biologicals Dispose Chemicals Dispose Inventory** Download/Reconcile Edit Depreciation * End Physical Inventory General Module **Fixed Asset Verify** HASP rights Initiate Inventory Lookup Depreciation Lookup Inventory Modify Catalog Items Manage Store **Modify Categories** Modify Biological Catalog Modify Biological Gateway Modify Chemical Catalog Modify Chemical/Physical Data Modify Master Vendor Inventory * Modify Roles Modify Synonyms Modify System Locations * Modify System Settings * Modify Users and Groups Modify Vendors MultiEdit Biological Inventory MultiEdit Chemical Inventory MultiEdit Inventory **Prepare Requisition** Prepare Requisitions for Others **Process Requisitions** Process Physical Inventory Quick-Add Codes **Record Consumption** Receive and Process Requisitions Record refills **Restore Biologicals** Enterprise User's Guide Restore Chemicals **Restore Disposed Inventory**

Transfer Inventory

GIVES PERMISSION TO	MOD	ULE
Add biological items	В	
Add inventory in the chemical or general modules	C,G	
Calculate asset age in the fixed asset module	G/FA	
Review and approve requisition requests for flagged items	S	
Print a series of barcodes for later use or print booklets of location, user, or group tags for use with barcode readers	C,G,E	3
Replace an old tag number with a new value	C,G,E	3
Access to the Biological Module	В	
Review and verify new biological catalog records	В	
Complete the monthly of annual depreciation calculations	FA C	
Review and verify new chemical catalog records		
Access to the Chemical Module, no default rights		
Use the default report options		,гА,З
Demovo Dialogicale from active inventory	С, D, З D)
Remove Biologicals from active inventory	В	
Remove chemicals from active inventory	C	
Remove general items from active inventory	G	, ,
View and modify depreciation values	C,G,E	>
view and modify depreciation values	FA	`
I erminate a physical inventory process	C,G.E	5
Access to the General Module; no default rights	G	
Review and verify new fixed asset catalog records	G,FA	
Rights associated with the Signage Program	C	
Define physical inventory criteria for process	C,G,E	3
View asset depreciation values without edit rights	FA	
Add as addit the senaral madule actales	C,G,E	>
Add or edit the general module catalog	G	
order and receive inventory Add or edit the category tree	S C,G,E	3
Add or edit the biological module catalog	В	
Add or edit the biological source, safety, regulatory data	В	
Add or edit the chemical module catalog	С	
Add or edit physical, safety, regulatory data	С	
NOT IN USE		
Add a Role or Change the rights of a roles	C,G,E	3
Add or update synonyms associated with category	C,G,E	3
Add or update location tree	C,G,E	3
Change default values, customized screen	C,G,E	3
Add or update users, user roles, groups, passwords	C,G,E	3
Add or update vendors list	C,G,E	3
Change more than one value for multiple records	В	
Change more than one value for multiple records	С	
Change more than one value for multiple records	G	
	S	
	S	
	S	
Update inventory records with downloaded data	C,G,E	3
Add on-the-fly to system coded tables	C,G,E	3
Enter details of chemical usage	С	
	S	
Enter details of refilled containers	С	
Return disposed Biologicals to active inventory	В	
Return dsposed containers to active inventory	С	8/2012
Return disposed general items to active inventory	G	
Relocate inventory and/or assign to new users	C,G,E	3
Access the View/Lindate menu	CGF	3

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.

					C	hemical: Roles/Rights				HE	LP LOGO
Warnin may be	ig: These i e modified	roles defir I.	ne the rights of individual user	s. By modifying these rights and	roles, the right	s previously assigned to sys	tem user	S			
List of	Roles										
Add Ne	ew Role		Results 1-5 of 5	Total Pages 1		First	Prev	Go to Page	1	Next	Last
			Role Name	Role Description							
≶∕∕	0	×	Administrator	Control System Acces	s						
4	1		Conoral	General							
€⁄	1	×	Inventory Manager	Adds, Edits, Dispose	s; no system ri	ghts					
۶⁄	0	×	Risk Manager	See and Control							
۶⁄	0	×	View Only	View-no edit rights							
Add No	ew Role		Results 1-5 of 5	Total Pages 1		First	Prev	Go to Page	1	Next	Last
Select	Module Fo	or Rights			*						
Availab	ole Rights	_				Assigned Rights	_		_		_
Modify System Settings				~	22	Add Biologicals					^
Modify Vendors			_		Add Inventory						
Process Physical Inventory				>	Dispose Biologicals						
Quick-Add Codes					Dispose Chemicals						
Record refills						Lookup Inventory					
Restore Biological Inventory				~	<	Modify Biological Gateway Modify Chemical Catalog					~
Resto	re Dispos	ed Invento	ory	¥		Modify Chemical Catalog					_

Defining Roles and Rights

To add a role and rights complete the following steps:

Required field: Role

Step	Your action			
1	Click Add New Ro	ole shown at	the top left of the	e results grid. Enter the Role Name in
	the new row that o	displays at the	e bottom of the g	rid.
	List of Roles			
	Add New Role Results 1-	- 5 of 5	Total Pages 1	First Prev <u>Go to Page</u> 1 Next Last
	Add New Role	<u>e</u>	Role Description	
	Administrati	tor	General	
	V / X Inventory	Manager	Adds, Edits, Disposes; no system ri	ghts
	🐓 🧳 🔀 Risk Manag	ger	See and Control	
	🐓 存 🛛 View Only		View-no edit rights	
				Save Cancel
				Add New Role Fields to Role Name List
2	Enter the Role Des	scription; this	will be the job de	escription for users with this role.
3	Click Save. The n	new role will b	e displayed in al	phabetic order in the List of Roles.
	(See the Role Nam	ne below that	says 'New Role'.)
4	Click the Select ic	on in the left-	most column to	enable the module and rights options.
5	To add or modify f	the rights for a	a given role, click	the Select icon to bring the rights
	into view for the d	esired role. A	Assign rights asso	ciated with the role. The data are
	saved after the tra	insfer of each	right.	
	List of Roles			
	Add New Role Results 1-	6 of 6	Total Pages 1	First Prev GotoPage 1 Next Last
	Role Name	e . Ior	Controls System Access	
	🐓 🧳 🔀 General		General	
	🐓 🧳 🔯 Inventory N	lanager	Adds, Edits, Disposes; no system rights	
	🐓 🖌 📭 🗵 New Role		New Role for Chemical Managemen	
	Risk Manag	jer .	See and Control	
	Add New Role Results 1-	6 of 6	Total Pages 1	First Prev Goto Page 1 Next Last
	Select Module For Rights		·••••••••••••••••••••••••••••••••••••	
	Available Rights	Biological Module Rights		Assigned Rights
	ChIM Module	ChIM Module Rights General Module Rights	>>	
	Modify Chemical Catalog	HASP Module Rights Shared Rights	>	
	MultiEdit Chemical Inventory	Supply Module Rights		
	Record refills Restore Chemicals		<	
				Adding Module Specific Rights

(continued)	6				
		Highlight one or more of the rights in the Available rights column and click > to add those rights to the new role.			
		the left mouse.]			
		module (General, ChIM, Biological, Supply, etc.) for the current role.			

Select Module For Rights	ChIM Module Rights	*	
Available Rights	Shared Rights		
ChIM Module	ChIM Module Rights		
Dispose Chemicals	General Module Rights	>	>
Modify Chemical Catalog	HASP Module Rights		-
Modify Chemical/Physical Data	Supply Module Rights	>	>
MultiEdit Chemical Inventory	Biological Module Rights		-
Record Consumption			`
Record refills		<	
Restore Chemicals	~		
Restore Chemicals	×		

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.

Organizatio Users / Groups

n Admin Tasks (continued)

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.

			Chem	ical: Users/G	roups		HELP LOGOFF	
Jser / Group Tree		Total Number of User(s): 87						
Search By 💿 User 🔾 Group		User Group Screen						
Enter Search Text	Search	User	User	Detail	Add	ress	Roles	
All User		User Name*						
Faculty of Health Sciences		Password	[1				C	
Faculty of Medicine		Confirm Password						
		Security Level*	1 ¥					
		Inactive			Site Admin			
			New	Save	Delete	Add to Group		
		Total Number of Group(s): 27						
		the second se						
		Group Tag*						
		Group Name*						
		Point of Contact			*			
		Inactive						
			New	Sa	ve	Delete		

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.)

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.

Organizatio Adding a Subgroup

n Ădmin Tasks (continued)

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 <i>add</i> or <i>transfer</i> 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.

Organizati Users

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

on Admin Tasks (continued)

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.

Organizatio Adding a User to a Group

n Ädmin Tasks (continued)

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.

		_		Chemical: Locations	HELP LOGOFF
Display Tag in Tree			i -	Total No of Location - 58	2
Location Tree			Tag	BSC	Print
	Search		Short Description	BSC	
All Locations		^	Location Type	Site Building Room	
Downtown Campus ART			Full Description		
BRS			PI		
E 🚓 BSC			Department		Clear
👧 BSC-2-370			Address	BioSciences30 Marie Curie	
BSC011			Use	~	
R BSC012A			Inactive	Control Area	Use Last Entered
6 BSC027 6 BSC130 6 BSC202A 6 BSC210			New	Save Delete Co	py. Move Paste

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.

	1 950
Address Data	
Address1*	
Address2	I
Address3	1
City] =
Country *	1
State/Province *]
Postal Code	1
New Save Delete Cancel	-
Enter information for an address and click Save.	
You may enter more than one address. Click New, then complete required details.	e the
In the location form, select the location address from the values in address dropdown.	n the

Organizatio To n Admin Tasks

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

Tasks Ste (continued) 1

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 <i>add</i> or <i>transfer to</i> 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.

Organizatio n Admin Tasks (continued)

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

SharedThe 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 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.

	Chemical:	Catalog: Edit			MESSAGES (0) LOGOFF ADMINISTRATOR
Search >						Street in the second
Search Q	uery Tool					
Inventory Catalog	Search - Chemical Module			Search By :-	Catalog	Synonym
Stock Number		Manufacturer		Vendor		Search
Product Name	ls	Active	All	•		Clear
Product No.	1234	CAS#	-			Export 🛐

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 xxxxxx-xx-x (e.g., 50-00-0). 'Valid' means as defined by the ACS algorithm. (<u>http://www.cas.org/expertise/cascontent/registry/checkdig.html</u>).

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)

	Chemical: Catalog: Edit										MESSAGES (0) LOGOFF ADMINISTRATO							
Search >																		
Search 0	Query Tool																	
Inventory Catalog	g Search - Chemical Module								5	earch By :-	Catalog	O Synony	m					
Stock Number				Manufa	cturer			1	Vendo	n l			Search	Ē				
Product Name	ls 💌			Active		All			-				Clear					
Product No.	1234			CAS#									Export 🛐					
Results 1-5 of 5		Total Pages 1		_	_	_	First	Prev	_	Go to Page	1	1	Next Last					
	Product Name	Stock Number	Category Member	Amount U-C	- Ven	dor	Manufacture	Product No.	CAS #		Alpha Sort		On Hand Quantity					
1,3,5-Tribromob	penzene			25.0000 g	Lancaster S	Synthesis		1234	626-39-1	1,3,5-Tribromot	benzene		0.00	1				
1.3,5-Tribromot	benzene			100.0000 g	Lancaster S	Synthesis		1234	626-39-1	1,3,5-Tribromot	enzene		0.00	I				
CADMIUM OXI	DE, POWDER, BAKER ANALYZEDr	1234-01		500.0000 g	J T Baker I	nc		1234	1306-19- 0	CADMIUM OXI	DE, POWDER,BAKER AI	NALYZEDr	5.00	2				
CADMIUM OXI	DE, POWDER, BAKER ANALYZEDr	1234-04		125.0000 g	J T Baker I	nc		1234	1306-19- 0	CADMIUM OXI Reagent	DE, POWDER, BAKER AI	NALYZEDr	2.00	1				
CADMIUM OXI	DE, POWDER BAKER ANALYZEDr	1234-07		12.0000 kg	J T Baker I	nc		1234	1306-19- 0	CADMIUM OXI Reagent	DE, POWDER, BAKER AI	NALYZEDr	0.00	E				
Results 1-5 of 5		Total Pages 1	-	_	_	_	First	Prev	-	Go to Page	1		liext Last	1				

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 Q	uery Tool											-		
Inventory Catalog	Search - Chemical Module									Search By :-	Catalog	Synony	/m	
Stock Number				Manufa	cturer	r l			Ve	ndor			Se	arch
Product Name	ls 💌			Active			Yes						C	ear
Product No.	1234		CAS#		ſ							Expo	nt 🗐	
Results 1-2 of 2		Total Pages 1		_			Firs	c Pre	y.	Go to Page	1		Next	Last
	Product Name	Stock Number	Category Member	Amount	U-O- M	Vendo	r Manufacturer	Product No.	CAS#		Alpha Sort		On I Qui	Hand antity
CADMIUM OXIE Reagent	E, POWDER BAKER ANALYZED	1234-01		500.0000	g	J T Baker Inc	r	1234	1306-19- 0	 CADMIUM OXIDE. Reagent 	POWDER, BAKER ANALY	YZEDr		5.00
CADMIUM OXIE Reagent	E, POWDER, BAKER ANALYZEDr	1234-04		125.0000	g	J T Baker Inc		1234	1306-19 0	 CADMIUM OXIDE, Reagent 	POWDER, BAKER ANAL	YZEDr		2.00
Results 1-2 of 2		Total Pages 1			_		Pirs	e Pre	Y.	Go to Page	1		Next	Last

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.

Search > Edit Catalog							
Item Data Chem Info Gateway							
Inventory Catalog Entry - Chemical Module Search By :- 💿 Catalog 🔿 Synonym							
* Product Name	CADMIUM OXIDE, POWDER, BAKER ANALYZEDr F	Reagent	Stock Number	1234-01	Product No.	1234	
QTY	0 Unit of Purchase	•	Vendor	J T Baker Inc 🔹	Manufacturer	•	
* Amount	500.0000 * U-O-M	g (g) 🔻	Max Onsite Container		Grade	BAKER ANALYZE	
Container Type		•	State	Solid (8) 🔻	Purity		
CAS#	1306-19-0		MSDS REF			MSDS On Site	
Category Member		•	Security Level	1 •	Use Last Entered		

Return to Search Results from Catalog Edit Details

Catalog (continued)

Table 1. Chemical Module Catalog Field Descriptions

Field	Description			
Chem Name	The name of the item, usually as listed in the vendor catalog			
(Description)	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			
Dreduct receber	Vendors			
Product number	The catalog of product number as shown on the container of			
Stock number	The product number <i>plus</i> the vendor's size specific			
	designation for example IT 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			
040	record for the CAS to manage toxicity and regulatory data			
CAS	The Chemical Abstracts Service number, if available, for pure			
Security Level	The value from 1 through 10 that designates the level of the			
Security Level	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			
5	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.			
	Inards - Chemical Extend Module - Physical Chemical Properties			
	Physical (Chemical Progenties CASis Desit Chemistane ACTIONIN-2000817810-ACS Master ID			
	Physical Chemical Mealth Hazards Celer COLORLISS LIQUID Uve Rate 11 Bulk-11 Viest			
	lg Grenny 0.756 Undetkerki 160 Boling Noretty 332.8 Plank Poretty 1.4			
	Metting Point(*) 129.72 Auto system Temp(*) 998 V liphor Pressure 24 g20C Decomp Temp 848			
	Vigour Genatry Lower Sea Linet 2.4% Water Schubity Ugger De Linet 12.5%			
	Other Soldality Bredt Life(In Days) 0 Develop(rg1) 0.79 Door			
	Art Semestive Hygoscopic Light Semastive Mosture Senative			
	Physical/Chemical Data			
Category Member	The grouping to which the item is linked; selected from a			
MSDS On Organization	The checkbox that indicates that an MSDS for this vendor's			
MSDS OF Organization	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	It is NOT necessary to populate these values unless your			
Purchase	organization uses them for a organization-specific			
	purpose. They will be used with the Supply Module.			

Note: Bold values represent recommended 'required' values.
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 <i>plus</i> 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.

 Table 1. Biological Module Catalog Field Descriptions

Note: Bold values represent recommended 'required' values.

Catalog Adding a Catalog I tem

(continued) 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

Stop	Vour Action
Step	Colort the Verden and/on Manufacturer from the dran down reason. Know
ð	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 beneful for your researchers. Examples include live sperm or embryon.
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)

S	C	hemical: Catalog: Create	New	MESSAGES (0) LOGO	OFF ADMINISTRATO
Create New Catalog >					
Item Data Chem Inf	fo Gateway				
Inventory Catalog Entry -Che	emical Module				
* Chem Name			Stock Number	* Product No.	
QTY	Unit of Purchase	-	Vendor	Manufacturer	-
* Amount	* U-O-M	-	Max Onsite Container	Grade	
Container Type		•	State	Purity	
CAS#			MSDS REF	MSDS On Site	
Category Member		•	Security Level	1 Use Last Entered	
Notes					
		*			

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 (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)

Search > Edit Cat	talog						
Item Data	Chem In	fo Gateway					
Chem Name		T Chemical: Catalog: Edit	ATE				
Alpha Sort		TETRABUTYL ORTHOSILIC	ATE				
CAS#		4766-57-8					
Mixture		Add Ingredients					
	Physical/Ch	nemical Data	Personal Protection	Synonyms	Risk & Safety Codes	Regulatory Data	MSDS Data
				Save			

The Chemical Information Gateway Options

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

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 .

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



Beginning Ingredients Form – No Constituents Defined

Catalog (continued)

To update or edit ingredients:

To upuale	o update of 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 -
VerifyBecause 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'.

				Verif	iy: C	atalog: Verify		_				HELP	LOGOFF
Se	arch >												
Sel	ect Module	Chem	nical	~	SEAR	сн							
Re	sults 1 - 1 of	1	Total	Pages 1			First	Pre	v <u>Go to</u>	Page 1		Next	Last
	<u>Chem</u> <u>Name</u>	<u>Stock</u> Number	<u>Category</u> <u>Member</u>	<u>Amount</u>	<u>U-O-</u> <u>M</u>	Vendor	Manufact	urer	Product NO	<u>CAS#</u>	<u>Alpha</u> <u>Sort</u>	<u>Or</u> Qu	<u>n Hand</u> Jantity
0	TOLUENE	155004-4L		4.000	L	Aldrich Chemical Company, Inc.			155004	108-88- 3	TOLUENE		0.00
Re	sults 1 - 1 of	1	Total	Pages 1	_		First	Pre	v <u>Go to</u>	Page 1		Next	Last

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 <u>Members</u> are linked to catalog records; therefore, there is no purpose in defining Categories unless you will define category members.

	Chemical: Categories	HELP LOGOFF
Category Tree	Category	
Search By Category Member Synonym	Name	
Search	Description	
All Category All Category	New Seve Deléte	
in Toluene Solution	Member	
n Benzene Solution	Name	
🗄 🔂 Equipment	Security Level 1 Y Life Day(s) Y Residual 9	6
	New Save Delete	
	Synonyms for Member	
	Synonyms	
	Névi Save Délete	

Category Tree Example

To Add a Category complete the following steps:

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.

Required Fields: Category Name

Category Members

Setup Menu – . Catalog / To Add a Category Member, complete the following steps: Category Members 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.

		Che	mical: Vendo	rs		HELP	LOGOF
Search >							
Vendor Information Se	arch						_
Field Name	~	Condition Contains		Value che	em		
	Field	1	Condition			Value	
Select	Name	Contains		chem			
	Add	Clear Delete	Search	Create New			
Results 1- 2 of 2	Add	Clear Delete	Search	Create New	io to Page 1	next	Last
Results 1- 2 of 2	Add	Clear Delete Total Pages 1	Search	Create New Filst Prev G	io to Page 1 Phone	Next FAX	Last
Results 1- 2 of 2	Add Name	Clear Delete Total Pages 1 Ce Vertêre	Search	Create New Hist Pley <u>G</u>	io to Page 1 Phone	HEXT FAX	Last
Results 1- 2 of 2 CHEMWATCH EMD Chem	Add Name	Clear Delete Total Pages 1 <u>Cr</u> Vertère	Search	Create New Hist Prev G	io to Page 1 Phone	next FAX	Last

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.

		Chemical: Vend	IORS HELP LOGOR
Search > Vendor Infor	mation		
Vendor Detail	MSDS Information		
*Name	ALDRICH	Alternate Name	Sigma Aldrich
*Code / ID	ALD	Address	
Contact		Line1	Sales Aldrich Chemical Company
Phone1		Line2	
Phone2		Line3	
Fax		City	Milawaukee
Email	sales@sial.com	Country	USA VINITED States of America
Web Site	www.sial.com	State / Province	WI VISCONSIN
Tax ID		Postal Code	
Supplier	Manufacturer	Customer	Inactive Vendor
			~
Notes			
		Save Cancel	

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)

lenu –	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.			

			Chemical: Veni	dors		HELP LOGO
Search > Vendor Inform	nution					
Vendor Detail	MSDS Information					
Name	Chemwatch		Alternate Name	Chemwatch		
Code / ID	2		Address			
Contact	Paul Ruez		Linet			
Phone1	615-394-9027		Line2			
Phone2			Line3			1
Fax			City	Cleveland		1
Email	pruez@chemwatchna.com	1.1	Country	USA	~	United States of America
Web Site	VERTERE.CHEMWATCHNA.	:OM	State / Province	OH	~	ОНЮ
Edt			Postal Code	(
Supplier	Manufacturer		Customer	inactive Vendor		
Notes						
						21
		Save	Cancel			

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.

	Chemical: Vendors	HELP LOGOFF
<u>Search</u> > Vendor Infe	ormation	
Vendor Detail	MSDS Information	
MSDS Name		
EXE Path	Browse	
INI Path	Browse	
Install Path	Browse	
	Internet	
	Save Cancel	

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.

_				Chemical: S	state/Country	HELP LOG
List of	Countries	s 💿 Acti	ve Olnactive OAll			
Add Ne	w Countr	¥	Results 211- 220 of 227	Total Pages 23	First Prev Go to Page 22	llext Last
			Country Name	Country Description		Active
<u>\$</u> /	0	×	URY	Uruguay		~
٠	1	×	USA	United States of America		V
۶⁄	0	×	UZB	Uzbekistan		~
3/	0	×	VAT	Holy See		~
3/	0	×	VCT	Saint Vincent and the Grenadines		~
3/	0	×	VEN	Venezuela		V
3/	0	×	VGB	British Virgin Islands		~
3/	0	×	VIR	United States Virgin Islands		~
3/	0	×	VNM	Viet Nam		~
3/	0	×	VUT	Vanuatu		V
Add Ne	Add New Country		Results 211- 220 of 227	Total Pages 23	First Prev Go to Page 22	Next Last
List of	States	_		2.110.000		0.00
Add Ne	w state	-	Results 1- 10 of 60	Total Pages 6	FIRST PLEY GO TO Page 1	Next Last
2/	1		AK	ALASKA		
30	1	12	AL	ALABAMA		
20	1	×.	AR	ARKANSAS		
20	1	X	45	AMERICAN SAMDA		
2	1	8	A7	ARIZONA		
24	1		CA	CALEORNIA		
20	1	13	c0	COLORADO		
2	1		CT	CONNECTICUT		
20	1	N	DC	DISTRICT OF COLUMBIA		
20	1	×	DE	DELAWARE		
Add Ne	w State	-	Results 1-10 of 60	Total Pages 6	First Go to Page 1	Next Last

Country and Related State Edit Forms

 Setup Menu 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.

 State /
 Country

 (continued)
 State | Your action

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 This section explains use and maintenance requirements for site-specific tables used in day-today 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.

ModuleModule menus for chemicals, equipment, biological, and supplies provide the means to maintainMenusthe 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.

🤣 VEF	ITÉRE	Inventory Management System	
SITE:UNIVERSITY OF OTTAW	A		HELP LOGOFF
Home	Home >		
Chemical 🔫		and the second	
Add		Welcome Super Us	ser to Vertere Inventory Manager
View/Update			N o
Restore			
Catalog 👻			1. The second
Physical Inventory			
Download Reconcile			
Reports		Welcome T	o chemical Module
Setup 👻	-		

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 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 Site-Specific Tables - Inventory

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:

Step	Action								
1	Select th	he Add menu opti	on.						
2	Search f Add or t a. E	for the correct pro- the Query Tool. Enter either a proc A product number may return seve or more supplier	oduct usi duct, sto er will ge ral recor s.	ng the ck or C enerally ds rep	Inventory AS numbe y return the resenting c	Catalog S r for the r e best res one or mo	Search most di sults alt re sizes	– Chem rect res hough i s from c	ical: ults. t one
	Search	Query Tool							
	Inventory Cat	alog Search - Chemical : Add				Search By :-	· Catalog	O Sync	nym
	Product Name	ls 💌			Stock Number				Search
	Manufacturer				No. 15	55004			Clear
	SUPPLIER	1			 Amount 	U-O-	M	54	Catalog Add
	CAS#		Active	All	•				
	Catalog	A CAS number wi The Chem Name	ill return may reti	all the urn mu	records th Iltiple items	hat share s.	that va	lue.	x
			_	Sea	ch Results		_		
	Results 1-5	of 5 Te	otal Pages 1	_	Fit	st Prev Got	p Page 1		Next Last
		Product Name	Product No.	Amount	J-O-M Stock Numb	er SUPPLIER	CAS#	Category Member	Manufacturer
	TOL	UENE	155004	2 0000	L 155004-1L	Aldrich	108-88-3		
	V / TOL	UENE	155004	4.0000	L	Sigma-Aldrich	108-88-3		
	V / TOU	LENE, 99.5%, A.C.S.	155004	1.0000	L	Sigma Aldrich	108-88-3		1
	V / TOU SPE	LENE, 99.5%, A.C.S. CTROPHOTOMETRIC GRADE	155004	2.0000	L	Sigma Aldrich	108-88-3		
	Results 1-5	of 5 T	otal Pages 1	_	Fir	st Prev Got	o Page 1		Next Last
					Cancel				
				Se	arch Result	ts from Ca	atalog v	vith Act	tive=All
	b. I e c. I	f the correct prod either the Search of f the product is di	duct doe or Query splayed,	es not Tool, comp	display an go to step ete the fol	id you ca 4 below. lowing ste	nnot lo eps:	ocate it	using

	Step	Action	
Add		i.	Choose the correct vendor and size from the results grid by
Inventory (continued)		clicking the checkmark. You can click the edit (\checkmark) icon to modify the catalog record if desired before proceeding to step ii. below.	
		The item Add screen will display.	
			 The item Add screen will display. 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 <i>in</i> 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 <i>in</i> 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.	Tag buttons will enable.
		Item Add No	otes Item being added: TOLUENE
		Parent Tag	Amount Remaining
		* Barcode #	UnTagged * Receive Date 06/12/2012
		* Location	PO Number
		* PI	V Old Barcode
		Group	
		Use	Research Opened Date
		Status	Expiration/Review
		Acquisition Type	
		QTY	1 Unit Cost Chem location # 1
		Unit	1.0000 Chem location # 2
		Amt Rem(Tare)	No accounts available. * 1,0000 Cost Centre Container Type
		State	Density 0.67 Refillable
			Save Copy Last Data Add Many Delete Print Tag Chemical Module Add Form
	3	Print Tag t	o print the barcode; apply it to the item.

Add	Step	Your Action
Inventory (continued)	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 (\checkmark) 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.

Delete

Inventory (continued)

Add

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.

Step	Your Action	I						
1	To enable thi checkbox ney the Parent T	s feature, sele (t to Links-Sp T ag button in t	ct the ChIM lit Containe he Add scree	Access tat rs and clicl n.	b on th k Save	e Settings p e. This ope	oage, clic ration en	k the ables
	System Tables	Customized Screens	Tag/ID Mask Setup	ChIM Access	Chemwa	atch Setup		
	Alert BOCA out o Expiring Ch	V Ref V Mii Re So	illable Containers kture Tracking quisitions urcing		Radioactiv	re Decay nagement		
	Z Consumption		Displa	able Canadian Regu y Amount and Amou	ilations (Fab unt Remainin	ng out to 4 💌 de	ecimal places.	
	Control Zone Mana Cost Tracking	15)	Tare Weight Calculations State St			Grama Kilograma		
	✓ Link-Split Containe	ers						
			-	Save		01.1		Tala
						Chil	W ACCESS	Tab
2	On the Item to view all ac record. OR ([Tab] to disp	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n he parent rec	g record. hat substan umber of t cord.	In the ace and the par	e Parent Ta I select one rent contair	ag field , as the P ner and	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n he parent rec Item being add	ng record. nat substan umber of t cord.	In the ace and the par	Parent Ta select one rent contain	ag field , as the P ner and	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n he parent rec Item being ado Amount Remaining	ng record. nat substan umber of t cord. ded: ACETONE C	In the ace and the par	Parent Ta I select one rent contain	ag field , as the P ner and	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode #	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag m he parent rec Item being ad Amount Remaining	ng record. nat substan umber of t cord. ded: ACETONE C	In the and the part	Parent Ta select one rent contain	ag field, as the P ner and	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n the parent rec Item being add Amount Remaining	ng record. nat substan umber of t cord. ded: ACETONE C UnTagged ▼	In the and the participation of the participation o	Parent Ta d select one rent contain ACS Receive Date O Number	ag field, as the P ner and	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n the parent rec Item being add Amount Remaining	ng record. nat substan umber of t cord. ded: ACETONE C UnTagged ↓ @ ↓ @	In the acc and the part of the	Parent Ta d select one rent contain ACS Receive Date O Number Id Barcode	ag field, as the P ner and 06/12/2012	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI Group	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag m he parent rec Item being ad Amount Remaining	eg record. nat substan umber of t cord. ded; ACETONE of UnTagged T	In the acc and the participation of the participati	Parent Ta I select one rent contain ACS Receive Date O Number Ild Barcode	ag field, as the P ner and	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI Group PI Transfer	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n the parent rec Item being add Amount Remaining	ng record. nat substan umber of t cord. ded: ACETONE C UnTagged	In the acc and the part the pa	Parent Ta d select one rent contain ACS Receive Date O Number Ild Barcode	ag field, as the P ner and	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI Group PI Transfer Use	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n he parent rec Item being add Amount Remaining	ng record. nat substan umber of t cord. ded: ACETONE C UnTagged ↓ ↓ ↓	In the acc and the part the pa	Parent Ta select one rent contain ACS Receive Date O Number Id Barcode Lab location upened Date viristion/Paview	ag field, as the P ner and 06/12/2012	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Ad Not Parent Tag * Barcode # * Location * PI Group PI Transfer Use Status	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag m he parent rec Item being ad Amount Remaining	eg record. hat substan umber of t cord. ded; ACETONE of UnTagged V C V C V C V C V C V C V C C C C C C C C C C C C C	In the part of the	ACS Receive Date O Number Id Barcode Lab location spened Date xpiration/Review ate	ag field, as the P ner and 06/12/2012	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI Group PI Transfer Use Status Acquisition Type	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n the parent rec Item being add Amount Remaining	eg record. hat substan umber of t cord. ded: ACETONE C UnTagged V C V V V V V V	In the nee and the participation of the participati	Parent Ta d select one rent contain ACS Receive Date O Number Id Barcode h Lab location opened Date xpiration/Review ate	ag field, as the P ner and 06/12/2012	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI Group PI Transfer Use Acquisition Type QTY	Add screen, so tive inventory preferred) ent blay details of t	elect a catalo records for th er the tag n he parent rec Item being add Amount Remaining	ng record. nat substan umber of t cord. ded: ACETONE C UnTagged ▼ இ ▼ ▼ ▼ ▼	In the nee and the part of the	Parent Ta Select one rent contain ACS Receive Date O Number Id Barcode a Lab location upened Date xpiration/Review ate Chem location # 1	ag field, as the P ner and 06/12/2012	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI Group PI Transfer Use Acquisition Type QTY Unit	Add screen, so tive inventory preferred) ent blay details of t es Research	elect a catalo records for th er the tag n the parent rec Item being add Amount Remaining Unit Cost Chem location # 2	ag record. hat substan umber of t cord. ded: ACETONE C UnTagged Value No occounts availa	In the part of the	Parent Ta select one rent contain ACS Receive Date O Number Id Barcode Lab location upened Date spiration/Review ate Chem location # 1	ag field, as the P ner and 06/12/2012	click arent press
2	On the Item to view all ac record. OR ([Tab] to disp Item Add Not Parent Tag * Barcode # * Location * PI Group PI Transfer Use Status Acquisition Type QTY Unit	Add screen, so tive inventory preferred) ent olay details of t	elect a catalo records for th er the tag n the parent red Item being add Amount Remaining Unit Cost Chem location # 2	ng record. nat substan umber of t cord. ded: ACETONE C UnTagged ↓ ↓ No accounts availa ↓	In the nee and the part of the	Parent Ta select one rent contain ACS Receive Date O Number Id Barcode a Lab location upened Date xpiration/Review ate Chem location # 1	ag field, as the P ner and 06/12/2012	click arent press

Add	Step	Your Action
(continued)	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.

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

Add Calculating Tare Weight Values (continued)

500 * 0.001 * 0.87 = .435 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 and you change the measure (e.g., the new measure (e.g., kilograms) of items. Because all values are stored displayed in your measure of choice only records that require microgram	with defined tare weights from grams to kilograms), lisplays for these chemical I in kilograms and , this change will affect calculations.							
2	When you add a define tare value seatch > Chemical Add Item Add Notes Parent Tag Barcode # 0000 Location CR Pi Bag Department Phys Alternate User Use Ree Status In U Acquisition Type Pur GTY Unit	Arrount Remaining Custom Los Container to your inventory using the existing and the existin	Add function, you may nown below.							
	Amount Rem(Tare)	200.00 Account lio. Container Tyr	De M							
	State	Density LT3	Refillable							
	The button will o catalog item: Ar the physical Sta in the Add windo	<i>Tare W</i> enable only if you have the correct val nount, Unit of Measure (U-O-M) and fo te and Density. If these values are mi ow.	<i>leight Calculations</i> ues for the selected or liquid and gas records, ssing, you can enter them							

Add	Step	Action							
Calculating	3	To record the ta	are values complete the fie	lds as follows:					
Tare Weight Values (continued)		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 through the fields as appropriate entering the lid, container (or with lid) weights. If no, key in the values and press Tab. 								
	4	The system pro	mpts you:						
		If VIM	The Prompt Displays	Action					
		Calculates the tare weight	Tare weight recorded as: grams or kilograms.	Click OK .					
		Does not calculate the tare weight (e.g., no density)	ChIM is unable to calculate tare because the density is zero. Enter the tare weight if known.	 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. 					
	5	Click OK		· · · · · · · · · · · · · · · · · · ·					

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.

Use the View/Update menu option to view inventory records, update a single record, View/Update 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 (Query Tool S	ican Tag											
Find Items That M	Match These Criteri	a - Chemic	al: View/U	pdate						Search	n By :- 🔍 O	atalog 🔿 Sy	nonym
Barcode #					PI							•	Search
Location	·			•	Group			-					
Product Name	ls 💌]								
CAS#	50000		View Link		Che	emwatch M	SDS		Icula	te Tare			
Multi Edit	Transfe	r	Dispo	se	0	hange Tag		Cha	nge (Catalog Exp	ort 🛐		
Select All	Results 1-25 of	208	Total Pag	ges 9	_	Firs	t Pl	ev	Go	to Page 1		Next	Last
F	Product Name	Barcode #	Location	In Lab location	QTY	Amount Remaining	U-O- M	Stock Number	CAS r #	PI	Group	PO Number Account	t Storage Linke
	DE-FRESH	MG9124	100LRR		1.00	4.0000	L.		50- 00- 0	Elden,Deborah	Arts Facilities Management group		Toxic cabinet
	DE-FRESH	MG9126	100LRR		1.00	4.0000	L		50- 00- 0	Elden,Deborah	Arts Facilities Management group		Toxic cabinet
	DE-FRESH	MG9127	100LRR		1.00	4.0000	Ľ.		50- 00- 0	Elden,Deborah	Arts Facilities Management group		Toxic cabinet
-	DE EDECU	MG9128	1001 88		1.00	4 0000			50-	Elden Dehorah	Arts Facilities		Toxic

Search Results in View / Update

(continued)

View/Update 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.

	Acquisition Type		Condition	Is Exactly		- V	alue		Add
	Acquisition Type Barcode #								Update
	CAS# Category		d		Condition	-	1	Value	Delete
elect	Category Member		1	Contains			500	0	Clear
	Chem location # 1 Chem location # 2								Search
	Expiration/Réview Date First Missing Formula Group In Lab location Inventory Date Location Manufacturer Notes Old Barcode Opened Date Pl Pl Transfer Product No.	- III							

Query Tools Common to All Modules

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.
- 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.

iearch >					
Search Qu	ery Tool Scan T	ag			
Add Scan Tags a	nd Find Items with th	iose scan tags			
Enter Tag	1				Add
	IL STREET	Item Tag		Item Description	Delete
	000004		TERT-AMYL ALCOHOL		Class.
Select					Liear
Select Select	000007		ACETONE, CERTIFIED ACS		

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.

linking is enabled, select one record and click **View Link** to view the parent or child record(s) as appropriate.

View/Update (continued)

lf

				Che	mical: V	iew/Upda	ate				HELF	P LOGOFF
Search >												
Search Query Tool Sca	an Tag											
Find Items That Match These Crit	teria - Chemical: View/Update	•					Searc	:h By :- 💿	Catalog	O Sync	nym	
Barcode #	rcode # PI								\sim	Se	earch	
Location		De	epartment							C	lear	
Chem Name Conta	ains 💙 formal	Ð	oport To		PDF Form	nat 🗸				F	Print	
CAS#		View Link	Chemwat	ch MSDS	Calcula	ate Tare						
Select All Multi Edit	<u>Transfer Dispose Cha</u>	nge Tag Results	1-139 of 139) To	tal Pages	1 ;	Show 10	irst Prev	Go to Page	1	Next	Last
Chem Na	ime Barcode	Location Lot Number	QTY	Amount Remaining	<u>U-O-M</u>	Stock Number	<u>CAS #</u>	<u>PI</u>	Department	<u>PO</u> Number	Account	Storage
BUFFERED NEUTRAL FORMA	ALIN 20% CP0020	DR0009	1.00	20.00 L			7558-79-4	Fletcher,Blll	Biology			Gray General
D BUFFERED NEUTRAL FORMA	ALIN 20% CP0021	DRO009	1.00	20.00 L			7558-79-4	Fletcher,Blll	Biology			Gray General
DUFFERED NEUTRAL FORMA	ALIN 20% CP0022	DR0009	1.00	20.00 L			7558-79-4	Fletcher,BIII	Biology			Gray General
D BUFFERED NEUTRAL FORMA	ALIN, 10 % BR0950	CRG212	1.00	4.00 L			50-00-0	Beauchemin,Dr. A.	Chemistry			Red
DUFFERED NEUTRAL FORMA	ALIN, 10 % BS0333	CRG422	1.00	4.00 L			50-00-0	Beauchemin,Dr. A.	Chemistry			Red
FORMALDEHYDE	999005	BSC-2-370	1.00	0.53 L			50-00-0	Beauchemin,Dr. A.	Chemistry			Red
FORMALDEHYDE	999006	BSC-2-370	1.00	0.47 L			50-00-0	Beauchemin,Dr. A.	Chemistry			Red
🔲 💋 FORMALDEHYDE	999007	BSC-2-370	1.00	0.47 L			50-00-0		Chemistry			Red
FORMALDEHYDE	999044	BSC-2-370	1.00	0.77 L			50-00-0		Chemistry			Red
FORMALDEHYDE	AB3535	MRN202	1.00	0.20 kg	1		50-00-0	Richeson,Dr.	Chemistry			Red
FORMALDEHYDE	AB6676	DR0124	1.00	0.47 L			50-00-0	Mayer,Dr.	Chemistry			Red

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 (\checkmark) 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 Multi-Edit

(continued)

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.

<u>Search</u> >	Multi Edit						
Multi Edi	t						
Field	Expiration Da	te	*	Value	14-May-09		
Custom Expiratio	Text 2123456 on Date14-Ma	566 y-09					
	Add Add	Delete		Pr	ocess	Cancel	

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,

or user and group.

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

Current values of ite	m(s) being tr	ansferred		_	_		_			_		
Product N	Barcode #	Location			PI		PI Transfer	Group	QTY			
FORMALDE-FRESH		MG9124	100LRR	1	Elden	ı,Deborah			Arts Facilities Management group	1.00		
Transfer Inventory												
Transfer Date	06/12/2012						[
* Location				•	₥	PI Transfer	[•	
* PI				•	8	Group	[
			Complet	te Tran	sfer	Car	icel					
								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.

Search > D	ispose Inventory					
Dispose Ir	nventory					
Disposal Date	04/10/2011					
* PI					•	8
* Disposal Method		~			Empty Container	
Approved On						
Amount to Dispose	0.00			Amou	nt Remaining	0.00
		Ok	Cancel			

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. Change Tag

View/Update (continued)

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.

<u>Search</u> > Change Tag	
Change Tag	
Replace Tag	AA3753
New Item Tag	990189
	Ok

Change Item Tag

Update Tare Weight

To update Tare Weight values, use View/Update.

Step	Action											
1	In View/Update, lo tools. You must cli	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. Tare Calculation Tare Calculation											
	Item Tag 000002											
	Chemical Name BENZENE											
		Weight	UOM	Weight(gm)								
	Lid	4.00000	g(g) 💙	4.00000								
	Container	10.00000	g(g) 🖌	10.00000								
	Amount	0.55000	L(L) 🗸	550.00000								
	Tare Wt(gm)	14.00000	Gross Wt(gm)	564.00000								
		Sa	ve									
				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 View Linked Records (continued) To view linked records, s

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.

Search >	🛢 View Link		Chemic	al: View/Undate		
Search Query Tool	Catalog Name	BUFFERED NEUTR	AL FORMALIN 20%			
Find Items That Match These					rch By t-	Catalog
Barcode #	Linked Items		Linked Item Details		-	-
Location	Tag Tree	Search	Amount Linked	0		
Chem Name C	E OLinked Tags		Linked by	20		
CAS#			On		F/SILIPIE.	er ter age
Cher					민	Department N
U BUFFERED NEUTRAL FO					Fletcher,Bill	Biology
DUFFERED NEUTRAL FO					Fletcher, BIII	Biology

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.

	Che	emica	l: View/Upd	ate			MESSAGES (0) LOGOFF A	DMINISTRATOR
Search > Chemical:	View/Upda	ite	and the second						
General Informatio	n								
* Barcode #	6154				UnTagged	QTY		1.00	Print Tag
* Chem Name	FOR	MALDE	HYDE, 37% BY WE	IGHT, WITH PRE	Stock Number	F79-1	1		
CAS#	50-00	0-0							
Location / Use	r Sta	atus	Custom Data						
Notes Pi	urchasing		Chemical Informati	on Gateway	Consumption / Refill				
* Vendor		Fisher	Scientific		Unit of Purchase				1
Manufacturer					Unit Cost				0.00
* Product No.		F79			PO Number				
QTY					0.00 * Receive Date		22-Jul-08		m
* Amount				-t.	0000 Acquisition Type				
*U-O-M		L(Litre	Age	1	0 Account No.		No accounts available.	+	
	_			-					
					Save				

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.

General Information						
* Barcode #	6154		UnTagged	QTY	1.00	Print Tag
* Chem Name	FORMALDEHYDE,	37% BY WEIGHT, WITH PR	E Stock Number	F79-1		
CAS#	50-00-0					
Location / User	Status Cu	stom Data				
Notes Purcha	asing Chemic	al Information Gateway	Consumption / Refill			
* Chem Name	FORMALDEHYDE,	37% BY WEIGHT, WITH PRE	ESERVATIVE			
Alpha Sort	FORMALDEHYDE,	37% BY WEIGHT, WITH PRI	ESERVATIVE			
CAS#	50-00-0					
Physical/Chem	nical Data	Synonyms	Risk & Safety Codes	Regulat	ory Data N	ISDS Link
			Caus			

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.

General Information				
* Barcode #	6154	UnTagged	QTY	1.00 Print Tag
* Chem Name	FORMALDEHYDE, 37% BY WEIGHT, WITH PRE	Stock Number	F79-1	
CAS#	50-00-0			
Location / User Notes Purch	Status Custom Data asing Chemical Information Gateway	Consumption / Refil		
Original Amount	1.0000 L(Litre)	Amount Remai	ning	1.0000 L(Litre)
Original Amount(Kg)	1.0000 Kg	Amount Remai	ning(Kg)	1.0000 Kg
Container Type				Tare Calculation
Consumption		Refill		
Amount Consumed	L(Litre)	Amount Added		L(Litre) 💌
		Refill Cost		
Date Consumed		Date Refilled		
Comments		Comments		۵. ۳
	Cor	nsumption/Refill History		
		Save		

Consumption / Refill for Inventory Item

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

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.

Required field: Amount Consumed

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.

Status Tab

Module Menus –*View/Update* (continued)

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

General Information					
* Barcode #	6154	UnTagged	QTY	1.00	Print Tag
* Chem Name	FORMALDEHYDE, 37% BY WEIGHT, WITH PRE	Stock Number	F79-1		
CAS#	50-00-0				
Location / User Notes Purch	Status Custom Data asing Chemical Information Gateway	Consumption / Refill			
Last Inventory Date	20-Jun-11 10:42:00 AM	First Missing D	ate		
Status		▼ Use			•
Security Level	1	v	Refillable	2	
		Save			

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.

General Information									
* Barcode #	6154			🔲 UnT	agged	QTY		1.00	Print Tag
* Chem Name	FORMALD	EHYDE, 37% BY WEIG	HT, WITH PRE	Stock N	lumber	F79-1			
CAS#	50-00-0								
Location / User	Status	Custom Data							
Notes Purcha	asing	Chemical Information	n Gateway	Consu	Imption / Refill				
Open date					Old Tag				
Expire Dat/Re-eval Dat	e] 🎟	Custom Text 2				
Custom Date 3					Custom Looku	p 1			•
Lot Number					Custom Looku	p 2			
				Si	ave				

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.

General Information	on				
* Barcode #	0000793	39	UnTagged	QTY	 1.00 Print Tag.,.
* Chem Name	FORMA	LDEHYDE SOLUTION	Stock Number		
CAS#	50-00-0				
Location / Use	er Statu	s Custom Data			
Notes	Purchasing	Chemical Information Gateway	Consumption / Ref	ar	
Catalog Notes			Item Notes		
		-	View Previous Notes	-	-
			Save		

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.

Search Query Too	1						
Find Disposed Items That M	latch These Criter	ria - Chemical: Restore	_				_
Barcode #	Ap	pproved By	•	Disposed Befo	ore		Search
Disposal Method	•			Disposed On/A	After		Clear
							Export 🚪
Select All Restore	Results 1-2	25 of 3381 Total Pages 136	_	First Prev	Go to Pa	age 1	Export Z
Select All Restore	Results 1- : Item Tag	25 of 3381 Total Pages 136 I# Description	_	First Prev Method	Go to Pa Amount Disposed	age 1 Approved By	Export Export Extended
Select All Restore Disposal Date	Results 1- Item Tag 4241	25 of 3381 Total Pages 136 # Description (+/-)-2-PENTANOL	_	First Prev Method Consumed	Go to Pa Amount Disposed 0.000	age 1 Approved By 0 Owen Iven	Export Export Extended as a constraint of the second secon
Select All Restore Disposal Date √ 16-Jun-11 ✓ 24-Nov-09	Results 1- Item Tag 4241 3956	Z5 of 3381 Total Pages 136 # Description (+/-)-2-PENTANOL (+/-)-EPICHLOROHYDRIN	_	First Prev Method Consumed Consumed	Go to Pa Amount Disposed 0.000 0.000	age 1 Approved By 0 Owen Iven 0 Bankhead Tallulah	Export Export Extended and a content of the second

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.

Notes for Inventory Item

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.

Search >					
Search Query Tool					
Search Audit Log -					
User		Тад		Search	
Date Is		•	And	Clear	
Module	Chemical Module	NOTE : Date ranges are inclusi	ve.		

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.

Search >	h Query Tool					
Field	Audit Date	Condition	Is Exactly	✓ Value	August 06,2008	Add
			Click Add Button to append a criteria		Aug 💙 2008 💙 📜	Update
					SMTWTFS	Delete
					3 4 5 6 7 8 9	Clear
					10 11 12 13 14 15 16 17 18 19 20 21 22 23	Search
				-	24 25 26 27 28 29 30	
					31 Close	

Query Tool in Audit Log

MASTER	ID
MASTER.	

Table Relationships: INV_CATALOG and C_MASTER

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

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

RELATIONSHIPS hemical Information Gateway

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

Item Data Che	m Info Gateway				
* Chem Name	FORMALDEHYDE				
Alpha Sort	Formaldehyde				
CAS#	50-00-0				
Mixture	Add Ingredients				
Physical/Chem	ical Data Synonyms Risk & Safety Codes Regulatory Data MSDS Data				
	Save				

The Chemical Information Gateway Option

BiologicalThe Biological Information Gateway allows quick access to the various Biological informationInformationscreens.GetawayGetaway

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 reevaluation 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.

Search > Chemical Catalog Update > Physical Chemical Properties							
Physical / Chemical Properties							
*CAS# 50-00-0	* Chemical Name	FORMALDEHYDE		Master ID 25	5671		
Physical Chemical Health Hazards							
Color	COLORLESS LIQUID		Evap Rate				
Sp Gravity	1.09		Volatile(%)				
Boiling Point(F)	-3.1 gas		Flash Point(F)	156.2			
Melting Point(F)	-133.6 gas		Auto Ignition Temp(F)	806			
Vapour Pressure	>100		Decomp Temp	806			
Vapour Density			Lower Exe Limit	7			
Water Solubility			Upper Exe Limit	73			
Other Solubility			Shelf Llfe(In Days)	0			
Density(Kg/L)	1.08		Odor				
Air Sensative	Hygroscopic		Radio Active				
Light Sensative	Moisture Sensitive		Decay	Half Life			

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.

Search > Chemical Catalog Update > Physical Chemical Properties							
Physical / Chemical Properties							
*CAS # 50-00-0	* Chemical Name	FORMALDEHYDE	Master	D 25671			
Physical Chemical Health	Hazards						
Check / Uncheck All	Health Hazards						
Auto Nervous System	Bladder	Blood	Bones	Cardiovascular System			
Central Nervous System	Eye	G.I. System	Heart	Kidney			
Liver	Lungs	Mucus Membrane	Pancreas	Prostate			
Respiratory System	Skin	Thyroid	Lachrymator	Mutagen			
Health Hazard_cust1	Health Hazard_cust2	Health Hazard_cust3	Health Hazard_cust4	Reproductive Toxin			
Teratogen							

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 & Safety Phra	ses							
* CAS #	50-00-0							
* Chemical Name	FORMALDEHYDE							
Risk Phrases Avail	lable							
Can become high Causes severe bu Contact with acid	nly flammable in us urns.(R35) Is liberates toxic g	e.(R30) as.(R31) vic.acc.(P32)						
Risk Phrases Used	a	de gas.(noz)			Add	Delete]	
Causes burns. (R: Extreme risk of e Limited evidence May cause SENS Toxic by inhalatio Safety Phrases Avi	34) xplosion by shock of a carcinogenic SITISATION by ski on, in contact with ailable	, friction, fire or other sources effect.(R40) n contact.(R43) skin and if swallowed.(R23/24)	of ignition.(R3) (25)					<
After contact with Avoid contact with Avoid contact with Avoid exposure -	n skin, wash imme h eyes.(S25) h skin.(S24) obtain special inst	diately with plenty of(S28) ructions before use.(S53)						<
Safety Phrases Us	ed				Add	Delete]	
Avoid contact with In case of accider In case of contact Keep out of reach Use only in well v	h skin and eyes.(S nt or if you feel un t with eyes, rinse n of children.(S2) ventilated areas.(S	224/25) well IMMEDIATELY contact Do with plenty of water and contact 51)	octor or Poisons Information ot Doctor or Poisons Inform	n Centre (show the labe ation Centre.(S26)	l where poss	ible).(S45)		

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	Regulatory Data					
* CAS # 50-00-0	*Chemica	I Name FORMALD	EHYDE			
Regulatory Data	IBC Can	adian Regulations	<u> </u>			
EPA Carcir	nogen DOT	Local Regs	Health/Safety			
CAA TQ	1	RQ CERCLA	100	311 Acute Hazard		
TPQ	500	НАР		311 Chronic Hazard		
RQ 313		РСВ		311 Fire Hazard		
TSCA		Sec 304 RQ	100	311 Pressure Hazard		
Waste ID-Part A	U122	Waste Code-Part B		311 Reactive Hazard		
ODS						

Regulatory Data

Federal Provincial TDG					
hemical Warfare Convention(CWC)					
Chedule					
Controlled Goods					
omestic Substances List Categorization					
Echological Categorization					
Persistent,Bioaccmulative and inherently toxic to the environment(PIT)					
Persistent and inherently toxic to the environment(PIT)					
Bioaccmulative, and inherently toxic to the environment(BIT)					
Human Health Categorization Criteria					
Priorities of Human Health					

Canadian Regulatory Tabs

TABLE
RELATIONSHIPS: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.

Regulatory Data							
* CAS # 50-00-0 *Chemical Name FORMALDEHYDE							
Regulatory Data II	Regulatory Data IBC Canadian Regulations						
Combustible Dust	~	Organic Peroxide	~				
Combustible Fiber	×	Oxidizer	~				
Combustible Liquid	×	Other Health Haz	~				
Compressed Gas	×	Peroxide Former	~				
Corrosive	×	Pyrophoric	~				
Cryogen	×	Radioactive	~				
Explosive	×	Sensitizer	~				
Flammable Gas	×	Toxic	~				
Flammable Liquid	✓	Unstable / Reactive	~				
Flammable Solid	I-A	Water Reactive	~				
Highly Toxic	I-B Flammable Liquid - IFC Clas	IFC_cust1	~				
Irritant	No Yes	IFC_cust2	~				
LPG	×	IFC_cust3	~				

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.'

Search > Chemical Catalog Update > Synonyms				
Synonyms				
*CAS#	50-00-0			
*Chemical Name	FORMALDEHYDE			
Synonym	FORMALIN			
ALDEHYDE FORMIQUE ALDEIDE FORMICA (ITA BFV FA FANNOFORM FORMALDEHYDD (CZECH FORMALDEHYDE (ACG FORMALDEHYDE, 37 W FORMALDEHYDE, 37 W FORMALDEHYDE, GAS FORMALIN FORMALIN (DOT)	(FRENCH) LIAN) H, POLISH) IH,OSHA) JTION (DOT) JT. % SOLUTION IN WATER, A.C.S. REAGENT			

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.

Search > Chemical Catalog Update > MSDS							
MSDS Link	ASDS Resources						
MSDS Information							
* CAS #	50-00-0	CW Id	85016				
* Chemical Name	FORMALDEHYDE						
Scanned MSDS	Currently no MSDS sto	ored.	View MSDS	Select MSDS			
	Save	Cancel	ChemWatch				

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.

Scanned MSDS

TABLE RELATIONSHIPS MSDS Links

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.

Search > Chemical (Catalog Update > MSDS			
MSDS Link	MSDS Resources			
		Scanned MSDS	×	
* CAS #	50-00-0	Scan	ined MSDS	
* Chemical Name	FORMALDEHYDE			
Scanned MSDS	Currently no MSDS st	Currently Stored File Path		
	Course	Currently no MSDS stored.		
	Save	New/Edit File Path		
		Scanned MSDS File	Browse	
		MSDS File Date	03/01/2009	
		O Save for this catalog item only		
		○ Save for all catalog records with CAS # '50-00-0'		
		○ Save for all catalog records from Vendor 'LANCASTER' and Product No. '14190'		
		Save	Cancel	

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

System The Vertere inventory Manager includes functions for managing chemical, biological, and equipment inventory within a research organization. These functions offer cradle-to-grave Overview 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 Change Password

Password

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

🄊 VER	TÉRE Inventory Ma	anagement System	HELP LOGOFF
Home	Change Password >		
System -		Change Password	
Administration		Current Password	
Audit Log		New Password	
Change Password		Confirm Password	
My Account		Save Clear	
License Info			
About Us		Please change your password periodically. Change your pas	sword now.

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.

🤣 VER	TÉRE Inventory Management System	
SITE:UNIVERSITY OF OTTAW		HELP LOGOFF
Home	Home >	
System 💌		
Administration		
Audit Log		Welcome Sharon Stasko to Vertere Inventory Manager Please select an active module from the list below
Change Password		
My Account		
License Info		
About Us		Al the
		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.

SITE:UNIVERSITY OF OTTAWA		HELP LOGOFF
Home	Home >	
Chemical 🔹		
Add	Welcome Sharon Stasko to Vertere Inventory Manager	
View/Update		
Restore		
Catalog 👻		
Physical Inventory		
Download Reconcile		
Setup 👻	Welcome To Chemical Module	
Settings		
Tags		
Location		
User/Group		
Categories		
Vendors		
Roles/Rights		
State/Country		

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.

 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 >									
Search Query Tool Scan Tag									
ind Items That Match These Criteria - Chemical: View/Update Search By :- 💿 Catalog O Synonym									
Barcode #			PI					•	Search
Location		•	Department					•	Clear
Chem Name Is 💌			Export To	PDF	F Format			*	Print
CAS# 67641	at Constantiate	1	Chemwatch MSDS	s c	Calculate Tar	2			
Multi Edit Transfe	er	1		Ch	nange Catalo	g			
Select All Results 1- 17 of 17	Total Pa	ges 1	First	Prev	Go to I	Page 1		Next	Last
<u>Chem Name</u>	Barcode # Location	Lot QTY	Amount Remaining U-O-M	Stock Number	<u>CAS#</u>	<u>PI</u>	Department	PO Number	Account Storage
ACETONE	000876 440 B90	B09B11 1.00	4.000 L 2	435-10	67-64-1	Al-taher,Fadwa			
ACETONE	002136 433 B90	76772 1.00	4.000 L A	\928-4	67-64-1	Jackson,Lauren			
🔎 ACETONE	004443 335 B90	010909c 1.00	4.000 L b	dh1101	67-64-1	Burton- Freeman,Britt			
🔎 ACETONE	004444 440 B90	010909c 1.00	4.000 L b	dh1101	67-64-1	Burton- Freeman,Britt			
ACETONE	004445 440 B90	010909c 1.00	4.000 L b	dh1101	67-64-1	Burton- Freeman,Britt			
ACETONE	004446 440 B90	010909c 1.00	4.000 L b	dh1101	67-64-1	Burton- Freeman,Britt			
🔎 ACETONE	004447 335 B90	010909c 1.00	4.000 L b	dh1101	67-64-1	Burton- Freeman,Britt			
ACETONE, 99.5%	005800 440 B90	b0516357 1.00	4.000 L 4	2324-41	67-64-1	Koontz,John			
ACETONE, 99.5%	006032 440 B90	B0516357 1.00	4.000 L 4	2324-41	67-64-1	Koontz,John			

Search Results in View / Update

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

View/Update 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**.

				Chemical: View/Update	HELP LC
Search >					
Search	Query Tool Scan Tag				
Find Iter	ns that match these criteria - Chem	ical: View/Update	-		
Field	Account No.	~ Co	ndition Is Exactly	Value	Add
	Alternate User	•	Click Add Button to an	pend criteria	Update
-	Barcode #				Delete
	Category				Clear
	Category Member Chem Name				Search
	Custom Lookup 1 Custom Lookup 2 Custom Text 2 Department Expiration Date First Missing Inventory Date Location Location Location Location Location Location Manufacturer Montes Old Tag Open date Pi Do Number Product No. OTY Receive Date Stock Number				

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 xxxxx 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.

Search >					
Search Qu	ery Tool Scan	Tag			
Add Scan Tags a	nd Find Items with	those scan tags			
Enter Tag	-				Add
	- Ulassa	Item Tag		Item Description	Delete
Select	000004		TERT-AMYL ALCOHOL		Charles -
Select	000007		ACETONE, CERTIFIED ACS		Clear
Salact	000008		ACETONE.CERTIFIED ACS		Descade

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	Click the magnifying glass to view details of a single record. (See Viewing						
Details	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	Select one record by clicking the box to the left and click ChemWatch						
Watch	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.						

Search >											
Search Query Tool	Scan Tag										
Find Items That Match These Cri	Find Items That Match These Criteria - Chemical: View/Update Search By :- 💿 Catalog 🔿 Synonym										
Barcode #				PI					-	Sear	rch
Location			•	Departmen	nt				•	Cle	ar
Chem Name Is	~			Export To		PDF Format			*	Prir	nt
CAS # 67641	(Chem	watch MSDS	Calculate T	are				
Multi Edit	Chemical Abstracts Serv Transfer	ce registery #				Change Cat	alog				
Select All Results 1- 17	of 17	Total Pages 1		_	First F	Prev <u>Got</u>	o Page 1		Next	Last	
Chem Name	Barcode #	Location Lot Number		Amount Remaining	<u>U-O-M <u>S</u></u>	tock mber CAS#	<u>P1</u>	Department	PO Number	Account	Storage
ACETONE	000876	440 B90 B09B11	1.00	4.000 L	2435	5-10 67-64-1	Al-taher,Fadwa				
ACETONE	002136	433 B90 76772	1.00	4.000 L	A92	8-4 67-64-1	Jackson,Lauren				
- ACETONE	004443	335 B90 010909c	1.00	4.000 L	bdh1	1101 67-64-1	Burton- Freeman,Britt				
ACETONE	004444	440 B90 010909c	1.00	4.000 L	bdh1	1101 67-64-1	Burton- Freeman,Britt				
ACETONE	004445	440 B90 010909c	1.00	4.000 L	bdh1	1101 67-64-1	Burton- Freeman,Britt				
ACETONE	004446	440 B90 010909c	1.00	4.000 L	bdh1	1101 67-64-1	Burton- Freeman,Britt				
ACETONE	004447	335 B90 010909c	1.00	4.000 L	bdh1	1101 67-64-1	Burton- Freeman,Britt				
🔎 ACETONE, 99.5%	005800	440 B90 b051635	7 1.00	4.000 L	4232	24-41 67-64-1	Koontz,John				
ACETONE, 99.5%	006032	440 B90 B051635	7 1.00	4.000 L	4232	24-41 67-64-1	Koontz, John				

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.

Canada a	B View Link		Chemic	al: View/Undate	1	
Search Query Tool	Catalog Name	BUFFERED NEUTR	AL FORMALIN 20%	tob By ta (Catalog	
Barcode #	Linked Items		Linked Item Details			Catalog
Location Chem Name C CAS#	Tag Tree - Oliver CP0020	Search	Amount Linked Amount Remaining Children Control Contro	0 20		
Select All <u>Multi Edit</u> Cher					Pletcher,Blll	Biology

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 <u>Search</u> 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.

search > Chemical: View/Update										
General Information										
* Barcode #	002136	UnTagged	QTY	1.0	Print Tag					
* Chem Name	ACETONE	Stock Number	A928-4							
CAS#	67-64-1									
Location / Urer St	tur Curtom Data									
Notes Purchasing	Chemical Information Gateway Consumptio	on / Refill								
Vendor	ALDRICH	Unit of Purchase			~					
Manufacturer		Unit Cost			0.00					
* Product No.	A928	PO Number								
QTY		0.00 * Receive Date	06-May-08							
* Amount		4.000 Acquisition Type			~					
*U-O-M	L(L) Age	0 Account No.			~					
		Save								

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.

Location / User	Status Custom Data							
Notes Purchasir	g Chemical Information Ga	teway Consump	ption / Refill					
* Chem Name	ACETONE	ing Catanan						
Alpha Sort	ACETONE	tion Gateway						
CAS#	67-64-1							
Physical/Chemical Data Synonyms Risk & Safety Codes Regulatory Data MSDS Link								

Chemical Information Gateway in Inventory Item Detail

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

Location / User Status	Custom Data						
Notes Purchasing C	hemical Information Gateway	Consumption / Refill					
Original Amount		4.000 L(L)	Amount Remaining	4.000 L(L)			
Original Amount(Kg)		4.000 Kg	Amount Remaining(Kg)	4.000 Kg			
Container Type				Tare Calculation			
Consumption			Refill				
Amount Consumed		L(L) 🗸	Amount Added	L(L) V			
			Refill Cost				
Date Consumed			Date Refilled				
Comments			Comments				
		~					
	Consumption/Refill History						
			Save				

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.

Location / User Status	Custom Data						
Notes Purchasing	Chemical Information Gateway	Consumption / Refill					
Last Inventory Date	11-Nov-09		First Missing Date	07-Jan-10 11:31:23 AM			
Status	Available for Sharing(5)	~	Use	Research(2)			
Security Level	1	×		Refillable			
Save							

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.

Location ,	/ User Status	Custom Data						
Notes	Purchasing	Chemical Information Gateway	Consumption / Refill					
Open date				Old Tag				
Expir/Re-eva	al	05-May-13		Custom Text 2				
Reserve				Hazardous				
* Lot Numbe	er	76772		Custom Lookup 2	×			
	Save							

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.

Location / User Status Custom Data								
Notes Purchasing Chemical Information Gateway	Consumption / Refill							
Catalog Notes		Item Notes						
		Additional information to display with all records						
View Previous Notes								
	Si	ave						

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 / Reconcile							HELP LOGOFF	
View Data									
• From ASCII File		C:\Program Files\Ve	ertere\Downlo	ad\outsidetrans	10-20-08.	tx Browse Upload	and Import		
O View Unprocessed Rec	O View Unprocessed Record Import Save All								
Create Location	Add Inventory	Relocate	Dispose	Replace	Tag	Physical Inventory	/		
Select All						<u>s</u>	ihow All	First Prey Goto	Next Last
lote : Italicized fields are inferred from the previous records.									
		De	elete	Edit	Pro	cess Print			
						Charm	inal Day	under al / Imane au	4 0

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.

Chemical Download / Import Options

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	То
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.

	Chemical: Download / Reconcile HELP LOGG								LP LOGO					
View	View Data													
• Fre	From ASCII File C:Program Files/Vertere:Download/outsidetrans10-20-08.tx Browse Upload and Import													
Ovi	ew Unproce	essed Record	Import		Save A	AII								
C	Create Loca	ition Add	Inventory	Relocat	e	Dispose	Replace Tag	Physical I	nventory					
🗌 Sel	ect All	Disposed It	ems: 1 To 25 0	if 59			Tota	l Pages: 3	Show.	AII	<u>I</u>	irst Prev <u>Go</u>	<u>to</u> 1	Next Last
	Container	Cont. Disposal Method	Disposal Method	Lab. Pack Tag	Item Tag		Item Descript	tion	Quantit	y Amt. Rem.	Disposed By	Authorized By	Date/Time	Comment
	Container	Transfer outside dept.(6)			220094	METHYL AL	COHOL, ANHYDROUS, A	R (ACS)	1	500	Ellis Vonnie		20-Oct-08	
	Container	Transfer outside dept.(6)			221424	1424 METHYL ALCOHOL, ANHYDROUS, AR (ACS) 1 4 Ellis V				Ellis Vonnie		20-Oct-08		
	Container	Transfer outside dept.(6)			219766	9766 ISOPROPYL ALCOHOL 1 4 Ellis Vonnie					20-Oct-08			
	Container	Transfer outside dept.(6)			211816	1816 SODIUM SULFATE, ANHYDROUS, GRANULAR 1 2.5 Ellis Vonnie					20-Oct-08			
	Container	Transfer outside dept.(6)			217734	SODIUM CHI	LORIDE		1	2.5	Ellis Vonnie		20-Oct-08	

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:



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	Prompt	Your Action						
Data (continued)	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 <i>will not</i> 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.						

1/2013

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.



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

2083570	570 S.T. Olin	218906	1	Tag # 218906 is currently disposed.	00001	Chem and Chem Bio	GC39	Coates Geoff	09-Jan-09	
						Detaile	ed Er	ror I	nformation	

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.

Dispose	
Tag	046310
Item Description	PALLADIUM ON ACTIVATED CARBON,
Approved By	
Dispose By	Ellis Vonnie
• Container	O Chemical
Disposal Code	Wash, rinse, dispose(2)
Empty Container	
Quantity 1	Remaining Amount 0
Lab Pack Tag	
	OK Cancel

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.

Relocate			
Item Tag	219599	Item Description	GLYCEROL, AR (ACS)
Present Status :		Transfer To :	
Location	G75A S.T. Olin	Location	G64 S.T. Olin
User	Wurtenberg,Denise	User	Crane Brian
Group	Chem and Chem Bio	Group	Chem and Chem Bio
Quantity	1	Quantity	1
	ок	Cancel	

Correcting an Invalid Location Field in Relocate/Transfer

DisposeThe 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.

Dispose	
Тад	046310
Item Description	PALLADIUM ON ACTIVATED CARBON,
Approved By	
Dispose By	Ellis Vonnie
• Container	○ Chemical
Disposal Code	Wash, rinse, dispose(2)
Empty Container	
Quantity 1	Remaining Amount 0
Lab Pack Tag	
	OK Cancel

Editing Disposal Data

ReplaceThe Replace Tag function allows you to assign a new tag value to an item while you areTag TabThe 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.]

Create Location	Add Inventory	Relocate	Dispose	Re	eplace Tag	Physi	cal Invent	ory		
Select All Cl	hanged Tag: 1 To 1 Of 1			_	Total	Pages: 1	_	Show All	First Prev Goto	llext Last
Location Tag	Location	Cu	irrent Item Ta	g	Item	Description	1	New Item Tag	Date/Time	Comment
🔲 💋 2019336AC	Acids 336 Bkaer	120567			Tag # 120567 is	currently disp	osed.	50004	30-0ct-06	
Note : Italicized fields are in	Inde : Italicized fields are inferred from the previous records.									
			elete	Edit	Pro	cess	Print			

Replace Tag with Identified Error Message

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

Replace Tag				
Location	Acids 336 Bkaer			
Old Item Tag	120567			
Item Description	Tag # 120567 is currently disposed.			
New Item Tag	50004			
	OK Cancel			

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.

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

View Data									
• From ASCII File					Browse Upl	oad and Impo	t		
View Unprocessed Record Import Save All									
Create Location	Add Inventory	Relocate	Dispose	Replace Tag	Physical Inven	tory			
Select All Loc	ated Item: 1 To 1 Of 1				Total Pages: 1			First Prey Goto 1	Next Last
Process ID	Location Tag	1	Location	Item Tag	Item Description	L. C. Star	Quantity	Date/Time	Comment
🗖 🖉 1	25	1D04	5 1	0035	DEOXYCHOLIC ACID SODIUM	SALT 1		1/6/2009 12:00:00	
								AM	
Note : Italicized fields are in	nferred from the previou	is records.						AM	
Note : Italicized fields are i	nferred from the previou	is records. Insert	Delete	Edit	Process	Print		AM	

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.

Physical Inventory	
Process ID	0
Location	
Item Tag	
Item Description	
Quantity	1
	OK Cancel

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.

* 🕸 🔢 -	Download / Reco	ncile	C Report	-	x	1	
< <back>></back>	Next						
Results 1 - 44			_	-			
98	🍓 • I 🍪 🛛		1 / 4	74	1.4% * 😽	Find	
1							-
	PEJNVENT		a s				
0.0	RE-INVENT						-
	Print Date 3	Jan-30-200	79				
	Scan Date	Tag	Description	Quantity	Location Tag	Location Description	
		() vi all	is a face.		Sector and	Constantion .	
	Aug-2-2006	18892 6	Tag # 188926 is currently disposed.	1	2019112	112 Baker	
	Aug-2-2006	21933 2	HYDROCHLOR C ACID, 36.5-	1	2019112	112 Baker	
			38.0%, A.C.S. REAGENT				
	Aug-2-2006	21940 5	SUCROSE, CRYSTAL, AR (ACS)	1	2019112	112 Baker	
190	Aug-2-2006	00892 5	Tag # 008925 is currently disposed.	1	2019112	112 Baker	
Ø	Aug-2-2006	9341	Error - Invalid BarCode	1	2019112	112 Baker	

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 \mathbf{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;
- 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.

PhysicalIn the PhysicalInventorywill be display(continued)defined for the

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.

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.

					Chemical: Phys	ical Invent	ory		HELP LOGOFF
Inventory Proc	ess >								
Active Invento	ory Process								
					Identifier				Create New
					Date Started				Create From Old
					By User				View Criteria
All	Fou	nd	Not Sca	inned	Relocated	Dispos	е	Added Items	
Results: 0					Total number of page	es:0 <u>Fir</u>	<u>st</u> <u>Pre</u>	v <u>Go to Page</u>	Next Last
<u>Status 1</u>	<u>Faq</u> <u>Quantity</u>	<u>Scanne</u>	ed Quantity	Location	Scanned Location	<u>n</u> <u>Descrip</u>	<u>tion</u>	Last Inventory Date	Scanned Date
Print									
End Physical	Inventory								Cancel

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.

			Chemical: Physical Inventory	HELP LOGOFF
Invento	ry Process >			
Active	Inventory Process			
			Identifier	Create New
			Date Started	Create From Old
			By User	View Criteria
Query	screen (Physical Inve	ntory)		
Field	Account No.	Condition	Is Exactly Value	V Add
-		Click /	dd Button to append a criteria	Delete
				Clear
Physic	al Inventory Descriptio	on(Required):		Ok

Define Physical Inventory Process Screen

Start Physical Inventory

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.

						Chemical: Physic	cal Inventory		HELP LOGOFF
Inventory Pro	cess >								
Active Inven	Active Inventory Process								
DRO124A FY	DR0124A FY09 Inventory(3)					Identifier	3		Create New
						Date Started	10/9/2008 5:29:00 PM		Create From Old
						By User	Administrator		View Criteria
All		Found		Not Sca	inned	Relocated	Dispose	Added Items	
Results: 1-3 o	of 3					Total number of pag	es :1 <u>First</u> <u>Pre</u>	v <u>Go to Page</u>	1 <u>Next</u> Last
<u>Status</u>	Taq	Quantity	Scann	ed Quantity	Location	Scanned Location	Description	Last Inventory Da	ate Scanned Date
Not Scanned	AR4363	1			DR0124A		TETRAHYDROFURAN	Sep 7 2001 12:00AM	
Not Scanned	AR4365	1			DR0124A		TETRAHYDROFURAN	Sep 7 2001 12:00AM	
Not Scanned	AR7219	1			DR0124A		WATER	Sep 7 2001 12:00AM	
Print									
End Physics	al Inven	tory							Cancel

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

Cancel or 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. End

Inventory **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.

Process

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**.

View Data									
From ASCII File					Browse Up	load and Import			
O View Unprocessed Rec	cord Import	Save	: All						
Create Location	Add Inventory	Relocate	Dispose	Replace Tag	Physical Inve	ntory			
Select All Loca	ated Item: 1 To 1 Of 1			Total	Pages: 1			First Prey Goto 1	Next Last
Process ID	Location Tag	L	ocation I	tem Tag	Item Descriptio	n G	Quantity	Date/Time	Comment
🗖 🖉 1 💦	25	1D045	10035	5 DEOX	YCHOLIC ACID SODIU	M SALT 1		1/6/2009 12:00:00 AM	
Note : Italicized fields are in	ferred from the previous	records.							
		Insert	Delete	Edit	Process	Print			

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/ 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.

Reconcile -Insert Tags on Physical Inventory Tab 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

						Chemical: Physic	cal Inv	ventory		HE	LP LOGOFF
Inventory Pro	ventory Process >										
Active Inven	Active Inventory Process										
DR0124A FY09 Inventory(3)						Identifier	3			C	reate New
						Date Started	10/9/20	008 5:29:00 PM		Crea	te From Old
						By User	Admir	nistrator		Vie	ew Criteria
All		Found		Not Sca	nned	Relocated	[Dispose	Added Items		
Results: 1-3 o	of 3		_			Total number of pag	es :1	First Prev	Go to Page	1	<u>Next Last</u>
<u>Status</u>	Taq	Quantity	<u>Scann</u>	ed Quantity	Location	Scanned Location	[Description	Last Inventory Da	te s	canned Date
Not Scanned	AR4363	1			DR0124A		TETRA	HYDROFURAN	Sep 7 2001 12:00AM		
Not Scanned	AR4365	1			DR0124A		TETRA	HYDROFURAN	Sep 7 2001 12:00AM		
Not Scanned	AR7219	1			DR0124A		WATER	R	Sep 7 2001 12:00AM		
Print											
End Physic	al Inver	ntory									Cancel

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	1	670 St Olin	101A Baker	FORMALDEHYDE 2,
No	Found	112080	1	1	348 Baker	101A Baker	FORMALDEHYDE 2,
Vo	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.
<i>Symbol 3090 Keyboard Layout and Use</i>	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.

<u>Key</u>	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. 					

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

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.

Verify that you have the following equipment:

Required 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

Installing Microsoft ActiveSync on your PC

Step	Action		
1	Insert the CD that was delivered with your Symbol unit into your computer's CD-ROM drive.		
2	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.		
	Microsoft ActiveSync 4.2 Destination Folder Click Next to install to this folder, or click Change to install to a different folder. Install Microsoft ActiveSync 4.2 to: C:\Program Files\Microsoft ActiveSync\ Change		
	Volume Disk Size Available Required Differences C: 74GB 57GB 28MB 57GB InstallShield C: Back Vext > Cancel		
3	Connect the Symbol cradle to your USB port.		

INSTALLATION	Step	Action
INSTRUCTIONS Installing Microsoft ActiveSync onto	4	Put the scanner into the cradle. The following screen displays:
		New Partnership
the PC (continued)		Set Up a Partnership
		Before you can synchronize information between your mobile device and this computer, you must set up a partnership between them.
		Would you like to set up a partnership?
		Set up a partnership so that I can synchronize information between my device and this computer.
		I don't want to synchronize information. Set up my device as a guest so that I can copy or move information between my device and this computer.
		< <u>Back</u> <u>Next</u> Cancel Help
		Choose "Yes" to set up a partnership.
	5	Follow the on-screen instructions on the wizard to complete installation.
	6	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.

GETTINGThe 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.



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 Setting Date and Time

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
Vertere ChIM X	Required value.
Transactions Help Data	Scan or Enter your User Tag Number (up to 20
USER LOGON	characters or digits). [This is the value assigned
ChIM Module	in the Settings/User Groups Extended information window; not the user name you use to login.]
v8.0	
	For System Administrators only:
USER TAG:	To activate special security features, enter
<u>-</u> ·····	vertere (not case sensitive) as the User Tag.
🗾 Vertere Chil 🐉 Windows Explorer 🛛 🖷	

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.
PASSWORD	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).
UNIT NUMBER:	
	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.

Prompt	Your Response			
FORCE SCAN	A choice is required.			
1 – NONE 2 – ITEM ONLY 3 – LOCATION ONLY 4 – BOTH	 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. 			
SELECT: 1	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	This option automatically looks up every tag as it is scanned in order to verify that the tag exists.			
1 – NONE 2 – ITEM ONLY 3 – LOCATION ONLY 4 – BOTH	 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. 			
SELECT:.	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	Optional. Allows the System Administrator to choose whether the system should prompt the user to enter the quantity when scanning.			
SELECT:.	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.			
OFTINO	Duamat		Verm Deemense	
-------------	--------------	-------------	------------------------------	---------------------------
GETTING	Prompt		Your Response	
STARTED	ENABLE MEN	J	This menu allows you to s	elect the transactions
Activating			that you want to make av	ailable to your users.
Special	1 - ADD LOC	6 - DISPOSE	Enter in all the numbers the	nat represent the menu
Security	2 – ADD INV	7 - REPLTAG	items to be enabled:	
Features			1 - Add Locations	6 – Dispose item
(continued)	4 – TRANSFER		2 – Add Inventory items	7 - Replace Tag
(commueu)	5- PHY INV	0 - UTIL	4 - Transfer	
			5 – Physical Inventory	0 – Utilities
	ENABLE:		5 5	
			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		Enter in the number that represents the transaction to be performed:	
1-ADD LOC 2-RELOCATE	6-PHY INV 7-DISPOSE	1-Add Locations 2- Transfer items	6-Physical Inventory 7-Dispose items
4-REPL TAG	0-UTIL	4-Replace tag	0-Utilities
SELECT:.			

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:

de tag number n, the area to
Location Tree
de tag number which will be o 15 characters
de tag number vhich will be o 15 characters
ode tag number ation (up to 15
ode w ode wh o

DATA	Prompt	Your Response
<i>COLLECTION Add Locations (continued)</i>	ADD LOCATION SHORT DESCRIPTION:	Required. Enter a name for the new location (up to 15 characters or digits).
	FUNC+7=MAIN MENU	
	ADD LOCATION 1-NXT LOC 3-CHG GRP 2-CHG PAR 4-CHG USR	Select from the displayed options: 1-add another lower location to the parent. System returns to New Location Tag screen.
	SELECT: FUNC+7=MAIN MENU	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
 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.

 (XA08)
 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	Optional. Enter or scan the Tag number associated with the User who will be responsible for the item(s)
USER TAG:	(up to 15 characters or digits).
FUNC+7=MAIN MENU	
RELOCATE	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
NEW LOCATION TAG:	which all of the following inventory items will be located (up to 15 characters or digits).
FUNC+7=MAIN MENU	
RELOCATE	Required. Enter or scan the barcode tag number of the item being relocated in this
ITEM TAG:	transfer operation (up to 15 characters or digits).
FUNC+7=MAIN MENU	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	Prompt	Your Response
<i>COLLECTION Replace Tag</i>	REPLACE TAG LOCATION TAG:	Required. Enter or scan the barcode tag number associated with the location (up to 15 characters or digits).
	FUNC+7=MAIN MENU	
	REPLACE TAG OLD TAG:	Enter or scan the existing tag number of an active inventory item.
	FUNC+7=MAIN MENU	
	REPLACE TAG NEW TAG:	Enter or scan the new tag number for the item.
	FUNC+7=MAIN MENU	
	REPLACE TAG 1 – NEXT REPLACEMENT 2 – CHANGE LOCATION	1 - Replace the tag of another item in the same location. System moves to Old Tag screen.
	FUNC+7=MAIN MENU	2- Replace tag of an item at another location. System moves to Location Tag screen.

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) The display and prompts for the Physical Inventory Process are:

DATA COLLECTION Physical Inventory (XA05) (continued)

Prompt	Your Response
PHYSICAL INVENTORY PROCESS ID:	Required. Enter or scan the number associated with the inventory process defined in Physical Inventory.
FUNC+7=MAIN MENU	
PHYSICAL INVENTORY LOCATION TAG:	Required. Enter or scan the tag number associated with the Location at which all the following were located (up to 15 characters or digits).
FUNC+7=MAIN MENU	This can be restricted to "scan only" by using the Administrator Logon mentioned earlier.
PHYSICAL INVENTORY ITEM TAG:	Required. Enter or scan the barcode tag number of the item (up to 15 characters or digits).
FUNC+7=MAIN MENU	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	Required. Enter the quantity of the item.
QUANTITY: 1 FUNC+7=MAIN MENU	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	Required.
1-EMPTY CONTAINER 2-CHEMICAL and CONTAINER	 1 = Container only. 2 = Chemical and Container. Upon choosing this option, the screen goes directly to the Disposal Method screen.
SELECT:	
FUNC+7=MAIN MENU	
DISPOSE	Required. This screen is bypassed when Option 2
1-OTHER METHOD 2-DEFAULT METHOD	1 = Other method; one of the optional codes defined in Setup / System Coded Tables for Disposal Methods.
SELECT:	Settings / Customized Screens. Upon choosing this
FUNC+7=MAIN MENU	option, the screen goes directly to the Item Tag screen.
DISPOSE CONT	Required. Enter the disposal code; this is the optional custom
DISPOSAL METHOD:	code defined in Setup / Settings / System Tables.
	(This screen does not appear when Option 2, Default Method is chosen)
FUNC+7=MAIN MENU	
DISPOSE CONT	Required. Enter or scan the barcode tag number of the ITEM being disposed in this transfer
ITEM TAG:	operation (up to 15 characters or digits).
FUNC+7=MAIN MENU	This prompt will repeat allowing the user to enter multiple container tags.
	When finished, the user will return to the Main Menu.

The handheld Utility menu offers the following options:

DATA COLLECTION Utilities

Prompt	Your Response
UTIL MENU	Type the number that represents the transaction to be
1-SAVE DATA	performed:
2-ERASE DATA	1 – Save the data file.
3-CHANGE USER	2 - Erase the data from the portable data terminal.
SELECT:	3 - Change the user.
FUNC+7=MAIN MENU	
DATA SAVED	The data is saved as an ASCII file on the mobile
ALL ACTIVE DATA HAS BEEN SAVED.	device. This file is ready to be transferred to the PC using the Download process described later.
1-UTIL MENU	
SELECT:.	
FUNC+7=MAIN MENU	
UNIT IS EMPTY	All data in the Symbol unit's memory has been erased.
DELETE.	
1-UTIL MENU	
SELECT:.	
FUNC+7=MAIN MENU	
CHANGE USER	Required value.
ChIM Module v8.0	Scan or Enter the new User Tag Number (up to 20 characters or digits).
USER TAG:	

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	Step	Action		
Synchronize	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 O-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:		
		Microsoft ActiveSync File View Iools Help Sync Stop Details Explore Options VIM101000 Connected Synchronized		
		Information Type Status		
	5	On the ActiveSync window, click the Explore icon. The Mobile Device Explorer window appears. Mobile Device File Edit Wew Favorites Tools Help Back © © © Search © Folders III Address © Mobile Device Folder Tasks Rename this folder Copy thi		

DOWNLOADING	Step	Action
Import to PC	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.
	12	Chemical: Download / Reconcile HELP Loop View Uses Contract: Download / Reconcile HELP Loop Of rom ASCR File Contract: Disposed Upload and Import View View View View View View View View
		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.

DOWNLOADINGDownloaded 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, XAO8, 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:			
	 Go to the Windows system tray located on the right of the taskbar. 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	If you are sure Palm Desktop software is not installed on your workstation, complete the following steps in the order specified.			
Step 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.

Perform an Initial SPT1800 HotSync

INSTALLATION Workstation Installation Procedures Step 2

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 Install PvimX

Workstation Installation Procedures Step 3 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.

- 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.

ersion				
Current User:		6321	✓ Create New User	
Choose .pdb database:	C:\Palm\632L	\Backup\VIMData.PDB		
Choose file save path:	C:\Program Fil	es\Vertere\Handheld		-
Enter or choose conver	ted file name	631216jul.txt	(must be .txt file)	
C:\ Palm G 632L Backup		ConnectionMgr NetworkDB,PDI psysLaunchDB, ScreenShotDB,I System_MIDLS VMAdmin PDB	DB.PDB B PDB PDB iounds.PDB	

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			
Enter a name and click the button to	the right to create a	a new user.	
Create New User	_	Create User	Done
Select a name and click the delete button to remove a user.	Current Users 6321 guest fred	1	
	Delete User	L	

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.

Choose Database	File			
Version				
Current User:		6321	Create N	lew User
Choose .pdb database:	C:\Palm\632L\B	ackup\VIMData.PDB		
Choose file save path:	C:\Program Files	Vertere\Handheld		
Enter or choose convert	ed file name	63121 6jul. txt	(must be .	txt file)
C:\ Palm 3 632L Backup		ConnectionMgrl NetworkDB,PDI psysLaunchDB, ScreenShotDB, System_MDLS VIMAdmin,PDB VIMAdmin,PDB	DB.PDB B PDB PDB counds.PDB	
	<u>.</u>	pdb files	1	Run

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.

Choose Database	File			
Version				
Current User:		guest	Create New	User
Choose .pdb database:	C:\Palm\632	L\Backup\VIMData.PDB		
Choose file save path:	C:\program fi	les\vertere\handheld		
Enter or choose convert	ed file name	21Mar06INV_3.asc	(must be .txt fi	le)
C:\ Tealm C: C:N C:N C:N C:N C:N C:N C:N C:N C:N		AddressCitiesDB.PDI AddressCompaniesD AddressCountriesDB. AddressStatesDB.PD AddressTitlesDB.PDI ConnectionMgrDB.PD MichauRuntime.PDB NetworkDB.PDB	B PDB PDB PB B B DB	
0 c:		pdb files	•	Run

- 2. Installation is complete.
- d) Click **Run** to test your connections.

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

DATA COLLECTION Preparations

SPT 1800

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 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**.

<i>DATA COLLECTION Start/Exit PalmVim_C</i>	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 DataWhen 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	Select PalmVim_C	
Symbol Scan Info	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 your User Tag (15 alpha numeric, maximum). See the System Administrator for your User Tag.	
ENTER	Tap ENTER Scan User Tag Enter User Tag 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	Tap Vertere. Tap ENTER and OK.	
	Enter System Administration password.	
ENTER		
	Scan User Tag	
	Enter User Tag	
	vertere 📃	
	Information	
	(i) Please enter a Password in the box	
	provided	
	unit.	
Physical Inventory	The 'Physical Inventory Scan Conditions' sets the field input	
Scan Conditions	for the Physical Inventory screen.	
O Kayad ar	Ton the Keyed on Seemed ention to allow Croffiti 2	
Scanned	keyboard and scanned input.	
O Scanned Only	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.	
	Administration	
	inventory Haministration	
	Unit ID 123212	
	Physical Inventory Scan Conditions	
	Keyed or scanned Scanned Only	
	(Save Changes) Logout	

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.

Prompt	Your Response
MAIN MENU Relocate (XA08) Dispose (XA09) Re-Inventory (XA05) Utilities	Select the transaction type by tapping the stylus on the appropriate option. Moin Menu User: 123 Relocate Dispose Re-Inventory Utilities

Exiting fromTo exit from the PalmVim_C application, tap Main Menu at the top of the displaythe Main Menuand 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.

New Group:		1002003
2.5		•
New User:		
3		
New Location:		
2		
ltern Tag:		
044	h	Anin Manue

Prompt	Your Response
RELOCATE	Scan or enter the Group Tag of the Group to which the new User is assigned.
NEW GROUP TAG	
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	Select the appropriate disposal option.	
O Empty Container O Chemical/ Container	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'. Dispose Empty Container Chemical/Container Authorized By: Dispose Method: Chemical Tag Rdd Main Menu	
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. Dispose @Empty Container Ochemical/Container Authorized By: Dispose Method: @Empty Container Add Main Menu		
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.

Physical Inven	tory
Process ID:	
3. 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997	•
Quantity:	
1	(Clear)
Location:	
ltern Tag:	
Rdd	(Main Menu)

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	Prompt	Your Response		
DATA COLLECTION Utilities (continued)	Prompt 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	Prompt	Your Response
COLLECTION Utilities (continued)	SEARCH DATABASE RECORDS (continued)	Fick search type Chemical Tag Disposal Type Location Tag Transaction Type User Code Search All Values Main Menu 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 .
	SEARCH RESULTS	Sample of 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.	Search Results Chemical Trans Type Time Ad Tag 1017217 05 3:20 PM 1004138 05 3:21 PM Search Again 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.

DATA	Prompt	Your Response		
COLLECTION Utilities	EDIT DATABASE RECORD	When you tap on the record (row) to be edited, the following window displays. Tap Edit to modify the current record.		
(continued)		Type: Relocate Barcode: 613 Owner: 12 New Location: 24 Edit Delete List Again Main Menu		
		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	Select LOCAL
HotSync Operation Complete	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.

Current User:		6321	Create New User
Choose .pdb database:	C:\Palm\632L\Bac	kup\VIMData.PDB	
Choose file save path:	C:\Program Files\V	ertere\Handheld	
Enter or choose convert	ed file name	n.txt	(must be .txt file)
C:\ Program Files Vertere Handheld Chim module	PDT 3100	6321.txt 63121 6jul.txt 63128jun.txt 63129jun.txt Vim.txt	

Creating a new file





Click **Yes** to process another file from a different SPT1800. Click **No** to exit the program.

Importing
DownloadedUse 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	Step	Action					
Downloaded Data	1	Open the Application folder, then the Vertere ChIM folder.					
(continued)		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.					
		Chemical: Download / Reconcile HELP Looor View Data • From ASCIE Fale • C:Program Fales://viertere@download/outsidetrans10-30-48.64, • Bronser, • Upload and Import • View Improcessed Record • Container • Relocate • Disposed Record • Exerc All • Container • Conta					
	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	Х
XA08	Relocate	Х
XA09	Dispose	Х

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)

Кеу	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					
Кеу	Normal	Shift or CAPS + Key	Orange + Key	Blue + Key	
Q	q	Q	&	Start Menu	
W	W	W	\$	Menu	
E	е	E	@	Messaging	
R	r	R	%	Calendar	
Т	t	Т	/	Contacts	
Y	у	Y	SEND	Phonepad	
U	u	U	1		
I	i	I	2	Cursor Up	
0	0	0	3		
Р	р	Р	END/ESC	OK	
Α	а	А	(
S	S	S)		
D	d	D	-		
F	f	F	:		
G	g	G	+		
H	h	Н	-		
J	j	J	4	Cursor Left	
K	k	К	5	Enter	
L	I	L	6	Cursor Right	
BACKSPACE	backspace		DEL		
Shift	Shift		CAPS		
Z	Z	Z	?		
X	х	Х	ļ		
С	С	С	``		
V	V	V	w		
В	b	В	=		
Ν	n	Ν	7		
Μ	m	М	8	Cursor Down	
1	,		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.

Verify that you have the following equipment:

Required 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

Installing Microsoft ActiveSync on your PC

The following section describes the steps required to load the data collection	۱
program on the Symbol unit.	

Step	Action	
1	Insert the CD delivered with your Symbol unit into your computer's CD-ROM drive.	
2	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. Microsoft ActiveSync 4.2 Destination Folder Click Next to install to this folder, or click Change to install to a different folder.	
	Instail Microsoft ActiveSync\	
3	Connect the Symbol cradle to your USB port.	

INSTALLATION	Step	Action
INSTRUCTIONS Installing Microsoft	4	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.
ActiveSync onto		New Partnership
(continued)		Set Up a Partnership
		Before you can synchronize information between your mobile device and this computer, you must set up a partnership between them.
		Would you like to set up a partnership?
		Yes Set up a partnership so that I can synchronize
		information between my device and this computer.
		I don't want to synchronize information. Set up my device as a guest so that I can copy or move information between my device and this computer.
		< Back Next > Cancel Help
	5	Follow the on-screen instructions on the wizard to complete installation.
	0	Chick Back Up Now to begin backing up your Chick Back Up Now to b
		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.
Enterprise User's Guide (v1.2)		8B 6 2/2009

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.

Step	Action
1	On the Pocket PC desktop, tap the Start icon.
2	Tap the Settings icon.
3	Tap on the System tab.
4	Tap the Clock & Alarms icon. Settings Settings About Brightness Clock & Memory Power Alarms Settings Radio Power Regional Settings Personal System Connections
5	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.
	12 Settings
	Clock & Alarms
	GMT-5 Eastern US 3 :32:39 PM 5 /14/2007 GMT+1 Paris,Madrid ▼ 9 :32:39 PM 9 :32:39 PM 1 5 /14/2007
	Time Alarms
6	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.

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
🎥 Vertere ChIM 💦 🗱 📢 3:39 🐽	Required value.
USER LOGON	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]
ChIM Module	
v8.0	-skip to Main Menu section for general user instructions
USER TAG:	For System Administrators only:
<u>-</u>	To activate special security features, enter vertere (not case sensitive) as the User Tag.
Transactions Help Data 🖉 🔺	

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	Required.
1 – NONE 2 – ITEM ONLY 3 – LOCATION ONLY 4 – BOTH SELECT: 1	 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	Prompt	Your Response
Special Security	ENABLE MENU	This menu allows you to select the transactions that you want to make available to your users. Key
Features (continued)	1 - ADD LOC 6 – PHY INV 2 – RELOCATE 7 - DISPOSE	in all the numbers that represent the menu items to be enabled:
	4 – REPL TAG 0 - UTIL	1 - Add Locations6 - Physical Inventory2 - Relocate Items7 - Dispose Items
	ENABLE:	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		Key in the number that re to be performed:	presents the transaction
1-ADD LOC	6-PHY INV	-	
2-RELOCATE	7-DISPOSE	1-Add Locations	6-Physical Inventory
		2- Transfer items	7-Dispose items
4-REPL TAG			
	0-UTIL	4-Replace tag	
			0-Utilities
SELECT:.			

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	Prompt	Your Response
COLLECTION Add Locations (continued)	ADD LOCATION SHORT DESCRIPTION:	Required. Enter a name for the new location (up to 15 characters or digits).
	ORANGE+END=MAIN MENU	
	ADD LOCATION 1-NXT LOC 3-CHG GRP 2-CHG PAR 4-CHG USR	Select from the displayed options: 1-add another lower location to the parent. System returns to New Location Tag screen.
	SELECT: ORANGE+END=MAIN MENU	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.
- 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	Optional. Key or scan the barcode tag number associated with the group, if any, which will be
GROUP TAG:	associated with the location (up to 15 characters or digits).
ORANGE+END=MAIN MENU	
RELOCATE	Optional. Key or scan the Tag number associated with the
USER TAG:	User who will be responsible for the item(s) (up to 15 characters or digits).
ORANGE+END=MAIN MENU	
RELOCATE	Optional if a user has been defined. Required if
NEW LOCATION TAG:	the Tag number associated with the Location at which all of the following inventory items will be located (up to 15 characters or digits).
ORANGE+END=MAIN MENU	
RELOCATE	Required. Key or scan the barcode tag number of the item being relocated in this transfer
ITEM TAG:	operation (up to 15 characters or digits).
	The portable data terminal will automatically
ORANGE+END=MAIN MENU	additional item barcodes.

DATA	Prompt	Your Response
COLLECTION Replace Tag	REPLACE TAG LOCATION TAG:	Required. Key or scan the barcode tag number associated with the location (up to 15 characters or digits).
	ORANGE+END=MAIN MENU	
	REPLACE TAG OLD TAG:	Enter or scan the existing tag number of an active inventory item.
	ORANGE+END=MAIN MENU	
	REPLACE TAG NEW TAG:	Enter or scan the new tag number for the item.
	ORANGE+END=MAIN MENU	
	REPLACE TAG 1 – NEXT REPLACEMENT 2 – CHANGE LOCATION	1 - Replace the tag of another item in the same location. System moves to Old Tag screen.
	ORANGE+END=MAIN MENU	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	Required.
INVENTORY PROCESS ID:	Key or scan the number associated with the inventory process defined in Physical Inventory.
ORANGE+END=MAIN MENU	
PHYSICAL	Required.
INVENTORY LOCATION TAG:	Key or scan the tag number associated with the Location at which all the following were located (up to 15 characters or digits).
ORANGE+END=MAIN MENU	This can be restricted to "scan only" by using the Administrator Logon mentioned earlier.
PHYSICAL	Required.
INVENTORY ITEM TAG:	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	Required when enabled. Enter the quantity of the item.
QUANTITY:	This entry can be disabled by the system administrator.
1 ORANGE+END=MAIN MENU	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	Required.
1-EMPTY CONTAINER 2-CHEMICAL and CONTAINER	 1 = Container only. 2 = Chemical and Container. Upon choosing this option, the screen goes directly to the Disposal Method screen.
SELECT:	
ORANGE+END=MAIN MENU	
DISPOSE	Required. This screen is bypassed when Option 2
1-OTHER METHOD 2-DEFAULT METHOD	1 = Other method; one of the optional codes defined in Setup / System Coded Tables for Disposal Methods.
SELECT:	2 = Default container method as defined in Setup / Settings / Customized Screens. Upon choosing this option, the screen goes directly to the Item Tag
ORANGE+END=MAIN MENU	screen.
DISPOSE CONT	Required.
DISPOSAL METHOD:	code defined in Setup / Settings / System Tables.
	(This screen does not appear when Option 2, Default Method is chosen)
ORANGE+END=MAIN MENU	
	Required. Key or scan the barcode tag number of
ITEM TAG:	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.
URANGE+END=MAIN MENU	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	Type the number that represents the transaction to be performed:
1-SAVE DATA	
2-ERASE DATA	1 – Save the data file.
S-CHANGE USER	2 - Erase the data from the portable data terminal.
SELECT:.	3 - Change the user.
ORANGE+END=MAIN MENU	
DATA SAVED	The data is saved as an ASCII file on the mobile
ALL ACTIVE DATA HAS BEEN	device. This file is ready to be transferred to the PC
SAVED.	using the Download process described later.
1-UTIL MENU	
SELECT:.	
ORANGE+END=MAIN MENU	
UNIT IS EMPTY	All data in the Symbol unit's memory has been
THERE IS NO DATA TO	erased.
DELETE.	
1-UTIL MENU	
SELECT:.	
ORANGE+END=MAIN MENU	
CHANGE USER	Required value.
ChIM Module v8.0	Scan or key the new User Tag Number (up to 20 characters or digits).
USER TAG:	

DOWNLOADING Download Process

Download from the Symbol 50 Use the Download/ imported from the

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	Action	
Import to PC	5	On the ActiveSync window, click the Explore icon. The Mobile Device Explorer window appears.
		Eile Edit View Favorites Iools Help
		🚱 Back 🝷 🌍 🖉 Şə Search 😥 Folders 🛄 -
		Address 🚺 Mobile Device
		Name Size Type Modified Application File Folder Application File Folder Move this folder Participation File Folder Move this folder Move this folder Participation File Folder Opplication File Folder Participation File Folder Other Places Participation File Folder Participation Windows File Folder Program Files File Folder Windows File Folder Participation Participation Microsoft .NET C 6.98KB Text Document 11/1/2003 3:01:28
	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	Step	Action					
Import to Download / Reconcile	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.					
	11	Click Import . The transactions display in a grid. Click on the tabs to see the transactions performed for each transaction type.					
		Chemical: Download / Reconcile					
		View Data					
		C:Program Files/Vertere/Download/outsidetrans10-20-U6.bx/ Bronse. Upload and Import					
		O View Unprocessed Record Import Save All					
		Create Location Add Inventory Relocate Dispose Replace Tag Physical Inventory					
		Select All Disposed Items: 1 to 25 0f 39 Total Pages: 3 Show All Press Prey, Goto 1 Itext Last Container, Cont. Disposal Disposal Lab. Pack Item Item Rescription Quantity Amt. Disposed Authorized Date Time Comment					
		Container Method Method Tag Tag north Casempton Control Rem. By By Date Inter Control Rem. By By					
		Container dept.(6) Zeverse int the Accorder, Ann Undos, AR (Acc) Totalener Transfer outside 20102 INETWO ALCOUND ANY VIDIOLS, AD (Arcs) 4 A Elle Visione 20104 no					
		Container dept.(6) 22/924 Int. Int. P. Container, New York, New Yor					
		Container					
		Container Transfer outside 217274 SODUM CHI ORDF 1 25 File Vonnie 20.0448					
	Importing Data from a						
	12	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).					
	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.

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

🔁 Vertere ChiM				
File Edit view Favorites Too	s Help			1
🗿 Back 🔹 🌍 👘 🏂 Searc	h 🌔 Folders 🛄 🔹			
Address 🗁 \Application\Vertere ChIM				🕑 🎅 Go
	Name	Size	Туре	Modified =
Other Places	Temp.dat Device.bin valid_tags.txt none zzz 2008_3_27 13_45.asc Valid_locs.txt	496 bytes 24 bytes 4.0 1MB 36 bytes 0 bytes	DAT File BIN File Text Document ASC File Text Document	3/31/2008 11:27:2 3/31/2008 11:21:0 3/31/2008 11:13:1 3/27/2008 2:45:46 12/18/2007 4:31:1

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	Install on PC		
	to Scanner			
Resource software for Scanner: Vertere Software\Common Install Files				
NETCFSetupv2.msi	Asp.Net compact format Version	Install on PC for transfer to Scanner		
	2			
symbolmdk.reg	Support software for Vertere	Copy from Vertere CD disk through		
	application	Activesync to My Device\Application		
symbolmdk.CPY	Support software for Vertere	Copy from Vertere CD disk through		
	application	Activesync to My Device\Application		
symbol.all.arm.cab	Support software for Vertere	Copy from Vertere CD disk through		
	application	Activesync to My Device\Application		
Vertere Software for scanner:	Vertere Software\Chemi	cal (or General\Fixed Asset)		
15May07\Vertere ChIM.CAB	Chemical Module software for	Copy from Vertere CD disk through		
	Scanner	Activesync to My Device\Application		
Vertere Chemical\ Device.bin	Resource file for Chemical	Copy from Vertere CD disk through		
	Module Scanner software	Activesync to My Device\Application\		
		Vertere ChIM		
Vertere Chemical \	Resource file for Chemical	Copy from Vertere CD disk through		
Valid_tags.txt	Module Scanner software	Activesync to My Device\Application\		
		Vertere ChIM		
Vertere Chemical \ Valid_locs.txt	Resource file for Chemical	Copy from Vertere CD disk through		
	Module Scanner software	Activesync to My Device Application		
15May 07) Vartara Camaral CAD	Chamical Madula activiare for	Convertere Chill		
TSMay071 Vertere General.CAB	Scappor	Actives under the My Device Application f		
Vertere Coperal \ Device hin	Bosourco filo for Conoral Modulo	Copy from Vortoro CD disk through		
Vertere General (Device.bill	Scapper software	Actives vnc to My Device Application		
	Scarmer software	Vertere General		
Vertere General \ Valid_tags txt	Resource file for General Module	Copy from Vertere CD disk through		
	Scanner software	Actives vnc to My Device \Application		
		Vertere General		
Vertere General \ Valid_locs.txt	Resource file for General Module	Copy from Vertere CD disk through		
_	Scanner software	Activesync to My Device\Application\		
		Vertere General		
Support Documentation and Reports				
Documentation	Scanner and Vertere User			
	Guides			
Validation Reports	Crystal reports for Valid location	Export to Ascii file *.txt , Copy to the		
	and Item tag Values	to My Device\Application\ Vertere		
	-	*\Valid *.txt		

INSTALLATION The Motorola/Symbol units come with the Vertere Inventory Manager Chemical Module program already installed.

WARNING:

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.

Step	Action			
1	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.			
2	Insert the CD that came with your unit into your computer's CD-ROM drive.			
3	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.			
	🛱 Microsoft ActiveSync 4.2			
	Destination Folder Click Next to install to this folder, or click Change to install to a different folder.			
	Install Microsoft ActiveSync 4.2 to: C:\Program Files\Microsoft ActiveSync\hange			
	Volume Disk Size Available Required Differences			
	C: 74GB 57GB 28MB 57GB			
	InstaliShield			
	< <u>B</u> ack <u>N</u> ext > Cancel			
4	Connect the cradle to your USB port.			

INSTALLATION Step Action **INSTRUCTIONS** 5 Put the scanner into the cradle. The following screen displays. You do not Installing want to establish a partnership, so choose "No" to set up the device as a Microsoft guest. ActiveSync onto the PC New Partnership (Continued) Set Up a Partnership Before you can synchronize information between your mobile device and this computer, you must set up a partnership between them. Would you like to set up a partnership? O Yes Set up a partnership so that I can synchronize information between my device and this computer. No I don't want to synchronize information. Set up my device as a guest so that I can copy or move information between my device and this computer. < Back Next > Cancel Help Follow the on-screen instructions on the wizard to complete installation. 6 Activesync completes the guest partnership. Leave the screen open to complete Step 2 7 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. × Backup Restore Use Backup to create a file on this computer that contains all the files, databases, personal information, RAM-based 6 programs and other information currently on your mobile device. Full backup Back up all information O Incremental backup Back up only the information that has changed since the last backup. Back up to this file Microsoft (Active Sync \Probles) Guest Backup sto Change Click Back Up Now to begin backing up your Back Up Now mobile device Automatically back up each time the device connects. OK Cancel

GETTING 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
TimeIt 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.StepAction

Step	Action		
1	On the Pocket PC desktop, tap the Start icon.		
2	Tap the Settings icon.		
3	Tap on the System tab.		
4	Tap the Clock & Alarms icon.		
5	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.		
	Tap the little OK button near the top right of the screen to return to the Control		
6	Panel, and then exit back to the Settings screen.		

Software
Installation
- Chemical
or GeneralComplete Steps 1 – 2 for either the Chemical or General Module. If you are licensed for
BOTH modules, complete these steps one time only.- Chemical
or General
ModuleComplete Step 3 to complete the Chemical Module installation.

Complete Step 4 to complete the General Module installation



Step	Action
2	 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.
	Image: Search Image: Search<
	Address Make Type Total Size System Tasks Cocal Disk (C:) Local Disk 27,9 GB View system information CD-RW Drive (D:) CD Drive Add or remove programs Mobile Device System Folder
	Mobile Device File Edit View Favorites Tools Help Back P Search Folders
	Address Mobile Device Name Size Type Modified Other Places My Computer My Documents My Network Places File Folder My Nusic File Folder Templates File Folder Templates File Folder
	My Windows Mobile-Based Device File Edit View Pack Pack Pack Polder Tasks Databases System Folder Databases System Folder Polder Pla Folder Pla Folder Pla Folder Pla Folder
	e. Paste the three files you copied in Step 2d into Application folder on the mobile device.



Step		Action
4	 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. 	
	nograms + 4 € 12:17	🗴 🛛 🎢 File Explorer 🛛 🗮 ┥< 8:31 🐼
	Air	Application - Name -
	Camer ActiveSure AirBEAM	≜ MC50 Demo 9/25/03 21B ▲
	Games ActiveSync Andream Client	a MC50wseApp 9/12/06 43B ■ MemTest 5/11/04 48.5K
		≡ (+msrsamp 7/26/04 17.0K
	Calculator Calendar File Explorer	NETCFv2.wce5 4/21/07 5.31M
		Notify 5/11/04 57.5K
	Find Help MC50 Demo	-m ScanWedge 8/2/04 154K
		SelfTest 7/28/04 230K
	a 🕺 🚺 🗖	al symbolmdk 12/18/07 13/B al symbolmdk 12/18/07 717B
	MSN Notes Pictures	
	Messenger	
	 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. 	
	<mark>9</mark> Start	🎢 Vertere 🛛 🗱 📢 8:32 🛞
	Today 07	address address
	Vertere	
	Contacts	Vertere Vertere
	Internet Explorer	ChIM General
	Messaging	
	 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 Gen	neral Module.