

## ENVIRONMENTAL MANAGEMENT SYSTEMS (EMS)

### EMS Reporting



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## Introduction

EMS utilizes two distinct reporting systems- **Crystal Reports** and **ad hoc reports**. Both of these contain preconfigured, preformatted report templates that are integrated with the EMS database. When launched they are populated with data from the database in real time and an on-screen preview of the report is displayed which you can send to the printer of your choice.

Adhoc reports have an integrated design interface within EMS that allows users to create and modify reports quickly and easily. Crystal Reports allows for more complex reports, however, if you want to modify a Crystal Reports template, you will need to contact Chemical Safety's Technical Support department for assistance. In most cases, this is a service that is covered by the Annual Support fee. Both ad hoc reports and Crystal Reports can be designed for any EMS module including Chemical Inventory, Waste, etc. When installed, they are seamlessly integrated into the menu options for each module.

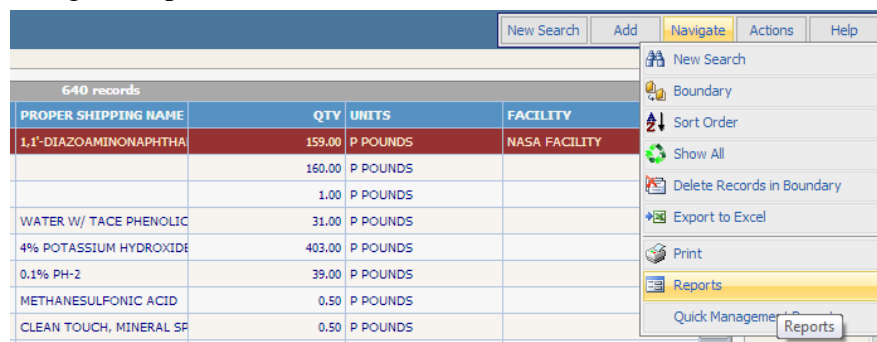
## Crystal Reports

There are several classes of EMS Crystal Reports:

- **Default Reports:** when you have a record open in any module, a dropdown list of standard default reports is launched when you click either the Tools\Print menu or the printer icon. From there you can opt to send the report to a printer. The list of available reports changes depending on the module you are in. The data is filtered by the search criteria for the module.
- **Quick Reports:** when you have a record open in any module, a dropdown list of customized Quick Reports is presented when you click the Tools\Reports menu where you can select a report to launch the preview window. From there you can send it to a printer. The list of available reports changes depending on the module and new reports can be added to the list. The data is limited to the records that were returned when you specified the search criteria for the module.
- **Date Range Reports:** when you have a record open in any EMS module, a dropdown list of date range reports is presented when you click the Action\Date Range Report menu. Select a report and a date range to launch the preview window. From there you can opt to send it to a printer. Like the default reports and the quick reports, the list of available reports will vary from module to module and new reports can be added to the list. Date Range reports differ from Quick Reports in the way the data is filtered. The data is preconfigured, sometimes including a combination of database tables, and it is filtered by the date range specified by the user when launching the report. It is independent of the search criteria for the module.

## Reporting on a Selection of Data

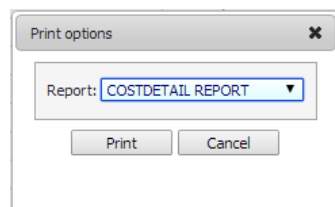
Open the EMS module that contains the data you are interested in viewing. In this example, we will use the Waste Drum. You will be presented with an opportunity to filter your search. The search results are called the **boundary**. When you run a report, you will be asked if you want to run the report on just a single record or “all in boundary. From the search results page, you can print a default report by selecting Navigate\Print. You can print a Quick Report by selecting Navigate\Reports:



The screenshot shows a software interface with a table of 640 records. The table has columns: PROPER SHIPPING NAME, QTY, UNITS, and FACILITY. The first row is highlighted in red. To the right of the table is a dropdown menu with the following options: New Search, Boundary, Sort Order, Show All, Delete Records in Boundary, Export to Excel, Print, Reports (highlighted), and Quick Management. A 'Reports' sub-menu is also visible.

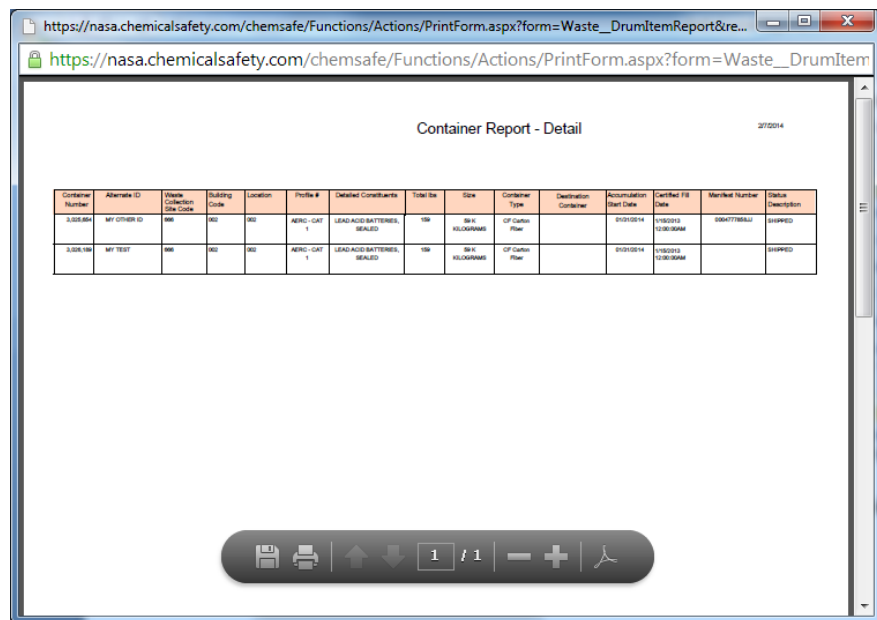
PROPER SHIPPING NAME	QTY	UNITS	FACILITY
L,1'-DIAZOAMINONAPHTHA	159.00	P POUNDS	NASA FACILITY
	160.00	P POUNDS	
	1.00	P POUNDS	
WATER W/ TACE PHENOLIC	31.00	P POUNDS	
4% POTASSIUM HYDROXIDE	403.00	P POUNDS	
0.1% PH-2	39.00	P POUNDS	
METHANESULFONIC ACID	0.50	P POUNDS	
CLEAN TOUCH, MINERAL SP	0.50	P POUNDS	

Select a particular report from the dropdown list; it will preview the report using all of the data within the boundary.



The 'Print options' dialog box has a 'Report:' dropdown menu with 'COSTDETAIL REPORT' selected. Below the dropdown are 'Print' and 'Cancel' buttons.

From the preview window, you can print or zoom.



The screenshot shows a web browser window displaying a 'Container Report - Detail'. The report is a table with columns: Container Number, Alternate ID, Waste Collection Site Code, Building Code, Location, Profile #, Detailed Constituents, Total lbs, Size, Container Type, Destination, Accumulation Start Date, Certified Fill Date, Marked Number, and Status Description. The table contains two rows of data. At the bottom of the window is a toolbar with icons for save, print, zoom, and other functions.

Container Number	Alternate ID	Waste Collection Site Code	Building Code	Location	Profile #	Detailed Constituents	Total lbs	Size	Container Type	Destination	Accumulation Start Date	Certified Fill Date	Marked Number	Status Description
3.005.004	MY OTHER ID	000	002	002	AEROC-GAT-1	LEAD-ACID BATTERIES, SEALED	159	55K (1000000000)	OP Carton Pallet		01/01/2014	11/01/2014	0000000000	SHIPPED
3.005.004	MY TEST	000	002	002	AEROC-GAT-1	LEAD-ACID BATTERIES, SEALED	159	55K (1000000000)	OP Carton Pallet		01/01/2014	11/01/2014	0000000000	SHIPPED

## Reporting on a Single Record of Data

If you only want to run the report for a single record, you need to open that record. You can print a Default Report by selecting Tools\Print. You can print a Quick Report by selecting Tools\Reports.

The screenshot shows the 'Waste Drum' application window. The 'Tools' menu is open, and the 'Reports' option is highlighted. Other options in the menu include 'Print', 'Quick Management Report', 'Restore Record', 'View Log', and 'Export to Excel'. The main window displays various fields for a waste drum record, including ID, Accum. Area, Tank, Facility, Location, and Container details.

This time the Print options box allows you to specify if you want to report on the active record only, or on the entire boundary of search results.

The 'Print options' dialog box is shown. It contains two radio buttons: 'All in boundary' (selected) and 'Active record only'. Below these is a dropdown menu labeled 'Report:' with 'COSTDETAIL REPORT' selected. At the bottom are 'Print' and 'Cancel' buttons.

## Reporting on a Date Range of Data

Open a particular record and select Actions\Date Range Report.

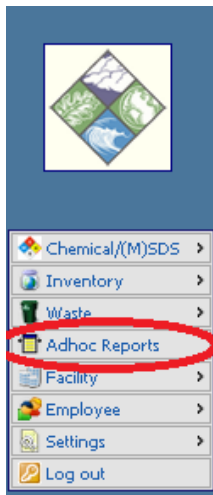
The screenshot shows the 'Waste Drum' application window with the 'Actions' menu open. The 'Date Range Report' option is highlighted. Other options in the menu include 'Transfer', 'Remove', 'Recalculate', 'Labels', 'Handheld Manager', 'Calculate Drum Cost', 'Check Open Drums', 'Reuse Drum', 'Replace Drum', 'View Audits', 'Electronic Submission 1348', 'Export PWC Billing Data', 'Export DRMO Billing Data', and 'Date Range Report'. The main window displays various fields for a waste drum record, including ID, Accum. Area, Tank, Facility, Location, and Container details.

You can select a report and the date range to report on. These reports combine records from the Waste Drum table and the Waste Item table. Date Range Reports are independent of the boundary.

The 'Drum Item Report' dialog box is shown. It contains a dropdown menu labeled 'Report:' with 'DETAILREPORT' selected. Below this are two text boxes labeled 'From:' and 'To:' with dates '1/8/2014' and '2/7/2014' respectively. At the bottom are 'Ok' and 'Cancel' buttons.

## Ad-hoc Reports

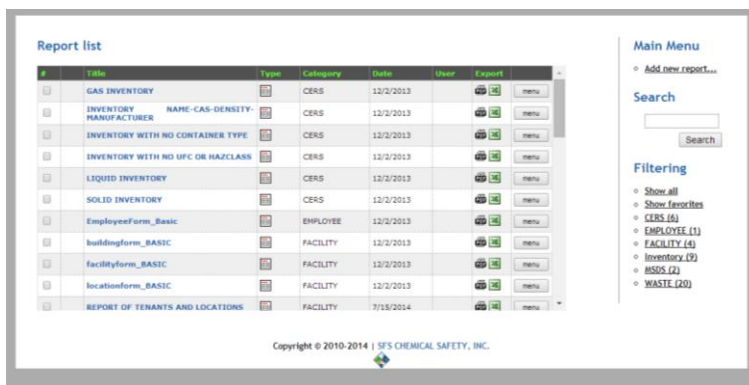
The Adhoc Reports module allows users to quickly and easily create custom reports, using any data field in EMS, including user-defined fields (UDF's). The Adhoc Reports module can be accessed either by clicking on Adhoc Reports on the left side of the screen or by clicking on the Report Center button on the lower right side of the screen:



Under the Report Center button, you will see a list of reports. These are reports that you can select as your favorite reports, and you will always see them when you log in to EMS. To run any of them, just click on the report's name and a report preview window will open. Click the x on the top right of the report preview window to close the preview.

To see a list of all Ad-hoc reports, click the **Report Center** header and you will see a list of existing reports.

- To preview a report, click on the name of the report.
- To edit a report, click the “Menu” link next to the report, then select “Edit”.
- To delete a report, click the Menu link next to the report, then select Delete.
- To create a new report, click the “Add New Report” link on the right side of the screen.



From the report preview window you can select common functions including return to report list, print, export (Excel, Word, CSV, XML, and RTF), send via email, results per page, and open in designer (edit mode).

LIQUID INVENTORY (CERS)

PHYSICAL STATE  
L

UPDATE RESULTS

# OF CONTAINERS	MANUFACTURER	QTY ON HAND	CHEMICAL NAME	PHYSICAL STATE	UNIT
0	ECO Labs	.000 063	Alkaline Bathroom Cleaner & Disinfectant-ECO Labs Liquid		LITERS
1	ALDRICH CHEMICAL	1.000	ACETONE-ALDRICH CHEMICAL	LIQUID	GALLONS
1	SIGMA ALDRICH	1.000	Silicone oil	LIQUID	LITERS
10	Aldrich Chemical	10.000	2-propanol	LIQUID	LITERS

# OF CONTAINERS	MANUFACTURER	QTY ON HAND	CHEMICAL NAME	PHYSICAL STATE	UNIT
1	Aldrich	4.000	Ethylene Glycol 99+%-Aldrich	LIQUID	LITERS

## Filtering Reports by Group

Click on any of the listed groups under filtering. The Adhoc system will list only the reports under that grouping. You can add a report to a group when you name it (or rename it).

### Report list

#	Title	Type	Category	Date	User	Export	
<input type="checkbox"/>	CHEMICAL LIST BY BUILDING - USER		Inventory	7/12/2014			menu
<input type="checkbox"/>	Chemicals by Building		Inventory	12/2/2013			menu
<input type="checkbox"/>	Chemicals by Hazard Class		Inventory	7/14/2014			menu
<input type="checkbox"/>	Chemicals by Regulation		Inventory	7/14/2014			menu
<input type="checkbox"/>	containerform_BASIC		Inventory	7/15/2014			menu
<input type="checkbox"/>	Flammable Chemicals		Inventory	7/14/2014			menu
<input type="checkbox"/>	Inventory		Inventory	12/2/2013			menu
<input type="checkbox"/>	InventoryForm_BASIC		Inventory	12/2/2013			menu
<input type="checkbox"/>	P65 Chemicals		Inventory	7/14/2014			menu

### Main Menu

◦ Add new report...

### Search


### Filtering

- Show all
- Show favorites
- CERS (6)
- EMPLOYEE (1)
- FACILITY (4)
- Inventory (9)
- MSDS (2)
- WASTE (20)

## How to Print a Management Report

Click Ad-hoc Reports from the main menu (or click on the Report Center button from the Quick Start page). Select the appropriate report from the list to launch a preview window. From there you can select print from the report preview menu.

## Ad-hoc Report Builder

The Ad-hoc Reports Module includes a full-featured report builder that gives you access to every field within the EMS database. Users can build new reports from the ground up or they can use existing reports as a starting point to create new reports (by modifying an existing report).

## How to Edit/Modify an Existing Management Report

- Click on **Ad-hoc Reports** from the main menu
- Click on **Menu**, then **Edit** to open the report you wish to clone
- Click the **Save As** button
- Type in a name and category for your new report and click **Ok**.

To open a report for editing (and copying/cloning to create a new report), select the **Menu** button (to the right side of the report) and then select **Edit** from the submenu that opens.

#### Report list

#	Title	Type	Category	Date	User	Export	
<input type="checkbox"/>	CHEMICAL LIST BY BUILDING - USER		Inventory	7/12/2014			menu
<input type="checkbox"/>	Chemicals by Building		Inventory	12/2/2013			Edit Delete Rename Set/unset favorite
<input type="checkbox"/>	Chemicals by Hazard Class		Inventory	7/14/2014			
<input type="checkbox"/>	containerform_BASIC		Inventory	7/15/2014			menu
<input type="checkbox"/>	Flammable Chemicals		Inventory	7/14/2014			menu
<input type="checkbox"/>	Inventory		Inventory	12/2/2013			menu
<input type="checkbox"/>	InventoryForm_BASIC		Inventory	12/2/2013			menu
<input type="checkbox"/>	P65 Chemicals		Inventory	7/14/2014			menu

The report customization screen will open to the **Fields** tab, as shown below. This view allows you to see which fields are in the report.

Fields Summary Chart Gauge Misc Style Filters Preview

Report List | Save | **Save As...** | Print | | | | | Results 100

Records

Field	Description	Sort	VG	A	Function	Format
FACILITY	FNAME	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
BUILDING NAME	BNAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
DEPARTMENT	DNAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
LOC DESCRIPTION	LOCATION/DESC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
COMMON	COMMON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
CAS #	CHEMICAL REFE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
TOTAL QUANTITY	QTY ON HAND	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	0.000
CONTAINER UNIT	UNIT OF MEASU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
UFC	FIRE CODES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

Before moving forward, select **Save As** to give your report a new name. This will ensure that the original report remains unchanged for later use. Type in a unique name for your new report and then click the down arrow to select a category so you can easily find this report later. Click the **Ok** button when done.

Input report name

NPS CHEMICALS

Category

Inventory

OK Cancel

To add a new field to a report, click the down arrow next to the blank field at the bottom of the **Field** column, and select the field you wish to add. In the **Description** column you will see the column header that will print on the report. You can change this if you wish. To delete a field from the report, click the delete button to the right of the field. Similarly, to insert a field above or below another field, use the **Insert Field Above** and **Insert Field Below** buttons.



Field	Description	Sort	VG	A	Function	Format
FACILITY	FNAME	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...	...
BUILDING NAME	BNAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
DEPARTMENT	DNAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
LOC DESCRIPTION	LOCATION/DES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
COMMON	COMMON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
CAS #	CHEMICAL REFE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
TOTAL QUANTITY	QTY ON HAND	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	0.000
CONTAINER UNIT	UNIT OF MEASU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
UFC	FIRE CODES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...
BUSINESS TYPE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...	...

# EMPLOYEES  
# LOCATIONS  
# TANKS  
24 HOUR PHONE  
ADDRESS  
ADDRESS (CONTINUED)  
ALT TITLE  
ALT. HOME PHONE  
ATKID  
BUSINESS HOURS  
**BUSINESS TYPE**  
CERSFACILITYID  
CERSID  
CERTIFICATION  
CITY  
COMMENTS  
CONSOLIDATE  
COUNTRY  
COUNTY NAME  
COUNTY/AA CODE

Preview

Another option to easily add fields to a report you are creating or editing is the **Quick Add** button as shown below.

Fields
Summary
Chart
Gauge
Misc
Style
Filters
Preview

Report List
Save
Save As...
Print
HTML
SQL
Excel
Word

Records 

Field	Description	Sort	VG	A	F
FACILITY	FACILITY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...
BUILDING NAME	BUILDING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...
LOC DESCRIPTION	LOCATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...
# OF CONTAINERS	INVENTORY # O	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
MANUFACTURER	MANUFACTUREI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
TOTAL QUANTITY	QTY ON HAND	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
CHEMICAL NAME	CHEMICAL NAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
PHYSICAL STATE	PHYSICAL STAT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
CONTAINER UNIT	UNIT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...

☐ Add Subtotals

Quick Add
Add Pivot
Continue to Summary
Preview

When you click the Quick Add button, a list of fields will display. They are listed under their database table names. For example, the fields from the BUILDING database table are listed under the word “BUILDING”. If you don’t see the field that you want, you should create a new report from scratch and select the “Extended” view of the fields. The basic view shows only the most common fields. The extended view shows all of the fields. Check the fields you want to add and then click **Ok** at the bottom of the **Quick Add** form. You can rearrange the field order as you desire and save the report.

Please select the fields you'd like to add to your report.

BUILDING	CHEMINV	FACILITY	LOCATION	MSCHEM	MSMSDS
<input type="checkbox"/> ALT PERSON LAST NAME	<input checked="" type="checkbox"/> # OF CONTAINERS	<input type="checkbox"/> ADDRESS	<input type="checkbox"/> TOTAL TANK CAPACITY	<input type="checkbox"/> AREA/GRID	<input type="checkbox"/> CAS #
<input type="checkbox"/> ALT PERSON WORK P...	<input type="checkbox"/> CONTAINER TYPE	<input type="checkbox"/> CITY	<input type="checkbox"/> ZIP CODE	<input type="checkbox"/> CONTROL AREA	<input checked="" type="checkbox"/> CHEMICAL NAME
<input type="checkbox"/> BUILDING CITY	<input checked="" type="checkbox"/> CONTAINER UNIT	<input type="checkbox"/> COUNTY/AA CODE		<input type="checkbox"/> COST CENTER	<input type="checkbox"/> DOT REGULATION
<input checked="" type="checkbox"/> BUILDING NAME	<input type="checkbox"/> DAYS ON SITE	<input type="checkbox"/> EPA ID		<input type="checkbox"/> DEPARTMENT	<input type="checkbox"/> DOT UN#
<input type="checkbox"/> BUILDING NUMBER	<input checked="" type="checkbox"/> MANUFACTURER	<input checked="" type="checkbox"/> FACILITY	<input type="checkbox"/> FLOOR	<input type="checkbox"/> EPA	<input type="checkbox"/> MANUFACTURER
<input type="checkbox"/> BUILDING STATE	<input type="checkbox"/> NOTES	<input type="checkbox"/> FACILITY SIZE	<input type="checkbox"/> LOC BARCODE	<input type="checkbox"/> ERG	<input type="checkbox"/> MSDS BRAND
<input type="checkbox"/> BUILDING SYNONYM	<input checked="" type="checkbox"/> PART NUMBER	<input type="checkbox"/> INVOICE	<input checked="" type="checkbox"/> LOC DESCRIPTION	<input type="checkbox"/> H PHRASES	<input type="checkbox"/> MSDS SHIPPING NAME
<input type="checkbox"/> BUILDING ZIP CODE	<input checked="" type="checkbox"/> PHYSICAL STATE	<input type="checkbox"/> NAICS CODE	<input type="checkbox"/> MAIL STOP	<input type="checkbox"/> HAZARD CLASS	<input type="checkbox"/> MSDS SUPPLIER
<input type="checkbox"/> POINT PERSON FIRS...	<input type="checkbox"/> PROCESS	<input type="checkbox"/> OWNER	<input type="checkbox"/> ROOM	<input type="checkbox"/> HAZARD LABEL	<input type="checkbox"/> MSDS/SDS #
<input type="checkbox"/> POINT PERSON LAST...	<input type="checkbox"/> PRODUCT TYPE	<input type="checkbox"/> PARENT COMPANY		<input type="checkbox"/> HAZARDOUS	<input type="checkbox"/> PRODUCT #
<input type="checkbox"/> POINT PERSON WORK...	<input type="checkbox"/> ROOM	<input type="checkbox"/> PARENT CONTACT		<input type="checkbox"/> P PHRASES	<input type="checkbox"/> PRODUCT NAME
	<input type="checkbox"/> SIZE	<input type="checkbox"/> PARENT FAC D &...		<input type="checkbox"/> PHYSICAL STATE	<input type="checkbox"/> PRODUCT TYPE
	<input checked="" type="checkbox"/> TOTAL QUANTITY	<input type="checkbox"/> PLANT #		<input type="checkbox"/> SHIPPING NAME	<input type="checkbox"/> REVISION DATE
		<input type="checkbox"/> REGION		<input type="checkbox"/> UFC	<input type="checkbox"/> SORT CHEMICAL NAME
		<input type="checkbox"/> REPORTING YEAR			
		<input type="checkbox"/> RESPONSIBLE LAST ...			
		<input type="checkbox"/> STATE			
		<input type="checkbox"/> STATE GENERATOR ID			
		<input type="checkbox"/> SYNONYM			
		<input type="checkbox"/> TERRITORY			

OK Cancel

To change the query search/criteria for a report, click the **Filters** tab (see the illustration below):

Fields Summary Chart Gauge Misc **Style** **Filters** Preview

Report List | Save Save As... PDF Print HTML SQL | Results 100

	Filter Field	Operator	Value(s)	Blank Param
1	BUILDING NAME	Equals	Warehouse	<input type="checkbox"/>
2	...	...		<input type="checkbox"/>

☐ Show Filters In Report Description

Require ... Parameters in Viewer

Filter Logic Ex:(1 OR 2) AND (3 OR 4)

Preview

Select a field for the Query by clicking the down-arrow in the **Filter Field** column. In this example we’ll use the Building Name field. Select an operator (for example: “Equals”) by clicking the down-arrow in the **Operator** column. Enter the value(s) to query for in the **Values** column- Warehouse in this example. Click the Save button (or the **Save As** button to save the report under another name). You can then click the **Preview** button or tab to preview your new report.

## How to Create a New Management Report

### Report list

#	Title	Type	Category	Date	User	Export	
<input type="checkbox"/>	GAS INVENTORY		CERS	12/2/2013			menu
<input type="checkbox"/>	INVENTORY NAME-CAS-DENSITY-MANUFACTURER		CERS	12/2/2013			menu
<input type="checkbox"/>	INVENTORY WITH NO CONTAINER TYPE		CERS	7/16/2014			menu
<input type="checkbox"/>	INVENTORY WITH NO UFC OR HAZCLASS		CERS	12/2/2013			menu
<input type="checkbox"/>	LIQUID INVENTORY		CERS	12/2/2013			menu
<input type="checkbox"/>	SOLID INVENTORY		CERS	12/2/2013			menu
<input type="checkbox"/>	EmployeeForm_Basic		EMPLOYEE	12/2/2013			menu
<input type="checkbox"/>	buildingform_BASIC		FACILITY	12/2/2013			menu
<input type="checkbox"/>	facilityform_BASIC		FACILITY	12/2/2013			menu
<input type="checkbox"/>	locationform_BASIC		FACILITY	12/2/2013			menu
<input type="checkbox"/>	REPORT OF TENANTS AND LOCATIONS		FACILITY	7/15/2014			menu
<input type="checkbox"/>	CHEMICAL LIST BY BUILDING - USER		Inventory	7/12/2014			menu

### Main Menu

- Add new report...

### Search



### Filtering

- Show all
- Show favorites
- CERS (6)
- EMPLOYEE (1)
- FACILITY (4)
- Inventory (10)
- MSDS (2)
- WASTE (20)

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- Click on Ad-hoc Reports from the main menu
- Click the **Add new report...** link to launch the report wizard
- Select the Category and Data Source. Based on the Category you selected, you will see a list of data sources in the right column. Data sources are groups of related data tables that have been connected together for you. When you create a new ad hoc report, you can select from basic or extended data sources. Basic data sources are a short list of the ones that you use most often (this list is user configurable). Extended data sources are a complete list of all data sources in the category. Click the down-arrow at the top of the Data Sources column to toggle between the two. You can also select Extended from the **Fields to show** drop-down menu to see the extended list of fields on the next screen of the report wizard. Click the **Continue** button when done.

### Data sources

Categories

Datasources: Basic
Fields to show: Basic
Next->

Backup  
Chemical Reference  
Employee  
Facility  
Materials  
MSDS

Facility, Building, Location  
Facility, Facility Transportation, Facility Tsd

Data from the Facility AND Building AND Location tables.

### Main menu

◦ Home

- To add a new field to a report, click the down arrow next to the blank field in the Field column, and select the first field for your report by clicking on its name in the dropdown list. In the Description column you will see the column header that will print on the report. You can change this if you wish. To delete a field from the report, click the delete button (x) to the right of the field. Similarly, to insert a field above or below another field, use the Insert Field Above and Insert Field Below buttons.

Fields Summary Chart Gauge Misc Style Filters Preview

Report List | Save | Save As... | Print | PDF | SQL | ... | Results 100

Records

Field Description Sort VG A Function Format

...  ...  ...

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary

- As demonstrated earlier, another option to easily add fields to a report you are creating (or editing) is the Quick Add button shown below.

Fields Summary Chart Gauge Misc Style Filters Preview

Report List | Save | Save As... | Print | PDF | SQL | ...

Records

Field	Description	Sort	VG	A	F
FACILITY	FACILITY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...
BUILDING NAME	BUILDING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...
LOC DESCRIPTION	LOCATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	...
# OF CONTAINERS	INVENTORY # O	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
MANUFACTURER	MANUFACTURE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
TOTAL QUANTITY	QTY ON HAND	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
CHEMICAL NAME	CHEMICAL NAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
PHYSICAL STATE	PHYSICAL STAT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
CONTAINER UNIT	UNIT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...
...	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	...

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

- When you click the Quick Add button, a list of fields will display. Check the fields you want to add and then click Ok at the bottom of the Quick Add form. You can rearrange the field order as you desire and save the report.

Please select the fields you'd like to add to your report.

BUILDING	CHEMINV	FACILITY	LOCATION	MSCHEM	MSMSDS
<input type="checkbox"/> ALT PERSON LAST NAME	<input checked="" type="checkbox"/> # OF CONTAINERS	<input type="checkbox"/> ADDRESS	<input type="checkbox"/> TOTAL TANK CAPACITY	<input type="checkbox"/> AREA/GRID	<input type="checkbox"/> CAS #
<input type="checkbox"/> ALT PERSON WORK P...	<input type="checkbox"/> CONTAINER TYPE	<input type="checkbox"/> CITY	<input type="checkbox"/> ZIP CODE	<input type="checkbox"/> CONTROL AREA	<input checked="" type="checkbox"/> CHEMICAL NAME
<input type="checkbox"/> BUILDING CITY	<input checked="" type="checkbox"/> CONTAINER UNIT	<input type="checkbox"/> COUNTY/AA CODE	<input type="checkbox"/> DEPARTMENT	<input type="checkbox"/> COST CENTER	<input type="checkbox"/> DOT REGULATION
<input checked="" type="checkbox"/> BUILDING NAME	<input type="checkbox"/> DAYS ON SITE	<input type="checkbox"/> EPA ID	<input type="checkbox"/> FLOOR	<input type="checkbox"/> DEPARTMENT	<input type="checkbox"/> DOT UN#
<input type="checkbox"/> BUILDING NUMBER	<input checked="" type="checkbox"/> MANUFACTURER	<input checked="" type="checkbox"/> FACILITY	<input type="checkbox"/> LOC BARCODE	<input type="checkbox"/> EPA	<input type="checkbox"/> MSDS BRAND
<input type="checkbox"/> BUILDING STATE	<input type="checkbox"/> NOTES	<input type="checkbox"/> FACILITY SIZE	<input checked="" type="checkbox"/> LOC DESCRIPTION	<input type="checkbox"/> ERG	<input type="checkbox"/> MSDS SHIPPING NAME
<input type="checkbox"/> BUILDING SYNONYM	<input type="checkbox"/> PART NUMBER	<input type="checkbox"/> INVOICE	<input type="checkbox"/> MAIL STOP	<input type="checkbox"/> H PHRASES	<input type="checkbox"/> MSDS SUPPLIER
<input type="checkbox"/> BUILDING ZIP CODE	<input checked="" type="checkbox"/> PHYSICAL STATE	<input type="checkbox"/> NAICS CODE	<input type="checkbox"/> ROOM	<input type="checkbox"/> HAZARD CLASS	<input type="checkbox"/> MSDS/SDS #
<input type="checkbox"/> POINT PERSON FIRS...	<input type="checkbox"/> PROCESS	<input type="checkbox"/> OWNER		<input type="checkbox"/> HAZARD LABEL	<input type="checkbox"/> PRODUCT #
<input type="checkbox"/> POINT PERSON LAST...	<input type="checkbox"/> PRODUCT TYPE	<input type="checkbox"/> PARENT COMPANY		<input type="checkbox"/> HAZARDOUS	<input type="checkbox"/> PRODUCT NAME
<input type="checkbox"/> POINT PERSON WORK...	<input type="checkbox"/> ROOM	<input type="checkbox"/> PARENT CONTACT		<input type="checkbox"/> P PHRASES	<input type="checkbox"/> PRODUCT TYPE
	<input type="checkbox"/> SIZE	<input type="checkbox"/> PARENT FAC D &...		<input type="checkbox"/> PHYSICAL STATE	<input type="checkbox"/> REVISION DATE
	<input checked="" type="checkbox"/> TOTAL QUANTITY	<input type="checkbox"/> PLANT #		<input type="checkbox"/> SHIPPING NAME	<input type="checkbox"/> SORT CHEMICAL NAME
		<input type="checkbox"/> REGION		<input type="checkbox"/> UFC	
		<input type="checkbox"/> REPORTING YEAR			
		<input type="checkbox"/> RESPONSIBLE LAST ...			
		<input type="checkbox"/> STATE			
		<input type="checkbox"/> STATE GENERATOR ID			
		<input type="checkbox"/> SYNONYM			
		<input type="checkbox"/> TERRITORY			

OK Cancel

- After you have selected a field, you can use the fields below to define how your field will appear in the report:

Field Description Sort VG A Function Format

CategoryID Category ID ... 0,000

- Description:** Allows you to change the name of the field that will appear in your report
- Sort checkbox:** Sort the results by this field in ascending order

- **VG (Visual Group) checkbox:** Allows you to organize data into multiple grids. When you check this box, you can change the formatting of the groups on the report by going to the Style table. Scroll down until you see the Visual Group Style dropdown. Select Multilevel with Labels.
- **A (Arithmetic) checkbox:** Click multibox to perform an arithmetic operation on the previous value. Allows you to add, subtract, multiply, or divide by the selection in the row above.
- **Function:** Allows you to perform a function on the selected field:

Function

...




Average  
Count  
Count Distinct  
Maximum  
Minimum  
Sum  
Sum Distinct  
Group

- **Format:** Allows you to change the format of the selected field:

Format

0,000

0,000  
0,000.00  
\$0.00  
\$/100  
0.0  
0.00  
0.000  
0%  
% of Group (with row)  
% of Group  
Gauge  
Gauge (variable)  
Dash Gauge

- To delete the specific field from the report, click the Delete button: 
- To insert a field above or below this specific field, click the Insert button: 
- To customize the format of a field, click the advanced settings button. 

Hide this field ☐

Sort (z-a) ☐

Italic ☐

Bold ☐

Width

Subreport

Drill-Down Style

Url

Subtotal Function

Text Highlight

Cell Highlight

OK

Adjust the field width by specifying a value in pixels (px):

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Records

Field	Description	Sort	VG	A	Function	Format			
PROFILE NUMBER	PROFILE NUMBER								
SHIPPING NAME	SHIPPING NAME								
HAZARD LABEL	HAZARD LABEL								

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

Fields. Add and fields from your data sources. Se fields and perform

Field: List fields avail from the

to Si  
right  
ries  
Jts t  
s, bu  
2.  
At: s  
elect

Hide this field ☐

Sort (z-a) ☐

Italic ☐

Bold ☐

Width

Subreport

Drill-Down Style


Url

Subtotal Function

OK

The field wrapping happens automatically:

PROFILE NUMBER	SHIPPING NAME	HAZARD LABEL
109AHM	BATTERIES, DRY, CONTAINING POTASSIUM HYDROXIDE, SOLID	CORROSIVE,
112HM	WASTE FLAMMABLE SOLIDS, TOXIC, ORGANIC, N.O.S. (DICYCLOHEXYLAMMONIUM NITRITE)	FLAMMABLE SOLID, POISON
113HM	WASTE CORROSIVE LIQUID, BASIC, INORGANIC, N.O.S. (SODIUM HYDROXIDE, SODIUM BORATE HYDRATE)	CORROSIVE
115HM	WASTE PETROLEUM DISTILLATES, N.O.S. (ISOPARAFFINIC PETROLEUM SOLVENT, HYDROTREATED HEAVY NAPHTHA)	FLAMMABLE LIQUID
120AHM	WASTE OXIDIZING SOLID, CORROSIVE, N.O.S. (BARIUM NITRATE, CHROMIC ACID)	OXIDIZER, CORROSIVE
121	WASTE TOXIC SOLID, INORGANIC, N.O.S. (LEAD)	POISON
122	HAZARDOUS WASTE SOLID, N.O.S. (MERCURY, LEAD)	CLASS 9
127AHM	WASTE TOXIC SOLID, ORGANIC, N.O.S. (SILVER, CHROMIC ACID)	POISON
127HM	WASTE OXYGEN GENERATOR, CHEMICAL	OXIDIZER,
128HM	WASTE FLAMMABLE LIQUIDS, N.O.S. (NAPHTHA, PETROLEUM SULFONATE)	FLAMMABLE LIQUID
129HM	WASTE AEROSOLS	NONFLAMMABLE GAS, CORROSIVE
135HM	WASTE ZINC POWDER	DAINGEROUS WHEN WET, SPONTANEOUSLY COMBUSTIBLE



- Make your changes and then click the OK button to return to the Field Selection screen.
- To change the order of the fields on the report, click the Order button 
- To Preview your new report, click the Preview button at the bottom of the list of fields
- To SAVE your new report, click the Save icon button at the top of the Report Design window

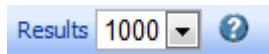


- To see a list of all reports, click the Report List button
- To create new report, click the New button
- To save your report as another report name, click the Save As button
- To print your report, click the Print button.
- To view the SQL for this report, click the SQL button.

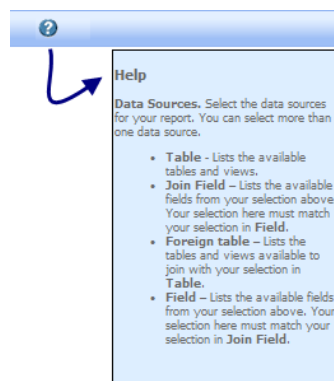
- These buttons allow you to export the report to other formats:



- Click this button to Email the report: 
- Click this button to view Administrative Settings: 
- Use the results dropdown arrow to select the number of records you wish to see on each page:



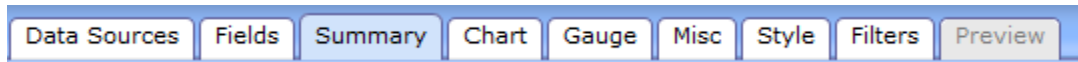
- Click the ? button to see help for the Report Design tab where you are working.



## Advanced Reporting Features

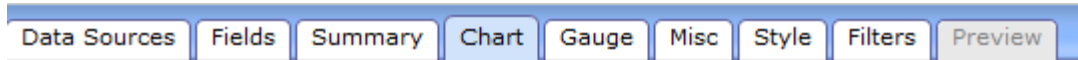
### Summary Tab

Allows you to view a summary of the fields tab selections.

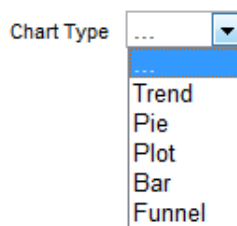


### Chart Tab

Allows you to insert a chart into your report.



Click the down-arrow next to “Chart Type” to select the type of Chart you wish to use:

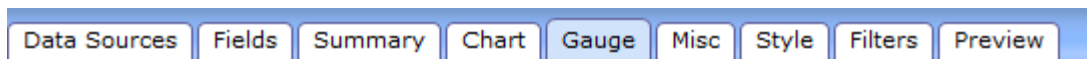


Types of charts:

- **Trend:** Select the Date and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.
- **Pie:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by. Show as a 3D graphic, explode the largest slice, and select between a pie or a doughnut.
- **Plot:** Select the X and Y values and click Sort A to indicate which one to sort by.
- **Bar chart:** Select the Label and its corresponding function and the Value and its corresponding function. Click Sort A to indicate which one to sort by.

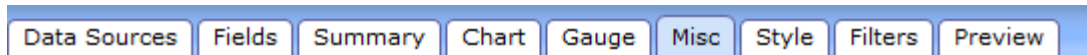
### Gauge Tab

Allows you to build dashboards and helps you visualize critical performance data.



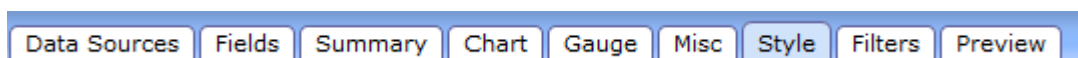
### Misc Tab

Allows you to add a title, report description, header, and footer to your report.



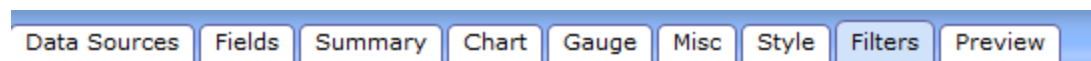
### Style Tab

Allows you to set colors for the report border, header, and data records. Click the Restore Default button to restore system defaults. If you select “Show Page Numbers” or “Show date and time”, this will only work for PDF output.



## Filters Tab

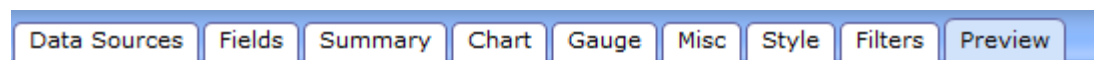
Allows you to create a query to select only the data you wish to see on the report. First choose the field you want to use for the filtering, then select the logical operator (for example: Begins With, Contains, etc.).



- **Filter Field:** Lists the available fields.
- **Operator:** Lists the operations available for the above field.
- **Value(s):** Allows you to input conditions for the operation.
- **Blank:** Check the box to return results with the value or a blank (null).
- **Param:** Check the box to allow users to modify the parameter from the report viewer.

## Preview

- Allows you to preview the report. When you preview your report, click on the column headings to sort in either Ascending or Descending order.



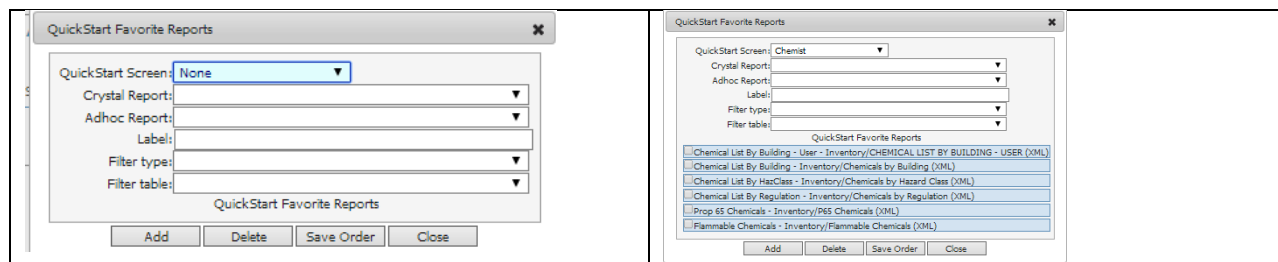
## Ad hoc Report Troubleshooting

If your report does not show the data that you expect, select the SQL button and it will produce a file that specifies the SQL Select statement that was used. Look for the file to appear in the lower left part of the screen. You can print it out or email it to Chemical Safety's Technical Support department if you want help troubleshooting your report.



## QuickStart Favorite Reports Configuration

Administrators can configure the default favorite reports that will be displayed on a particular QuickStart screen for both groups and users. Favorite reports can also be configured by EMS users on their own by selecting Settings -> User Preferences -> Quickstart Favorite Reports. Begin by selecting the QuickStart Screen for which favorite reports are to be added. In the example below, we have added Favorite Reports for the Chemist QuickStart screen.



A maximum of six QuickStart Favorite reports can be listed.

- To remove an existing report, check the checkbox next to it and click **Delete**.
- To add a report, click on the dropdown for **Ad-hoc Report** and select one of the existing Ad-hoc (management) reports. Once selected, enter the name that you want this report to show as in the **Label** field. If a report you would like to add is not available, you will first need to create it in EMS' Ad-hoc reports module before you can select it here. To add Crystal reports, click on the **Crystal Reports** dropdown and select one of the existing Crystal Reports that have been applied to your installation. Once selected, enter the name that you want this report to display as in the Label field. You can contact EMS Technical Support if you wish to modify or add a Crystal Report. (This work is covered by your annual support agreement with Chemical Safety).