ENVIRONMENTAL MANAGEMENT SYSTEMS (EMS)

USER REFERENCE GUIDE

www.chemicalsafety.com

Table of Contents

Section One: Accessing the EMS System
Instructions for Accessing the On-line (Cloud) Version of EMS:

1. Open a web browser. In the address (URL) field at the top of the window, enter the URL for the training site which we will be working in today:

   nps.chemicalsafety.com

   The URL for the actual production site is:

   nsam.chemicalsafety.com
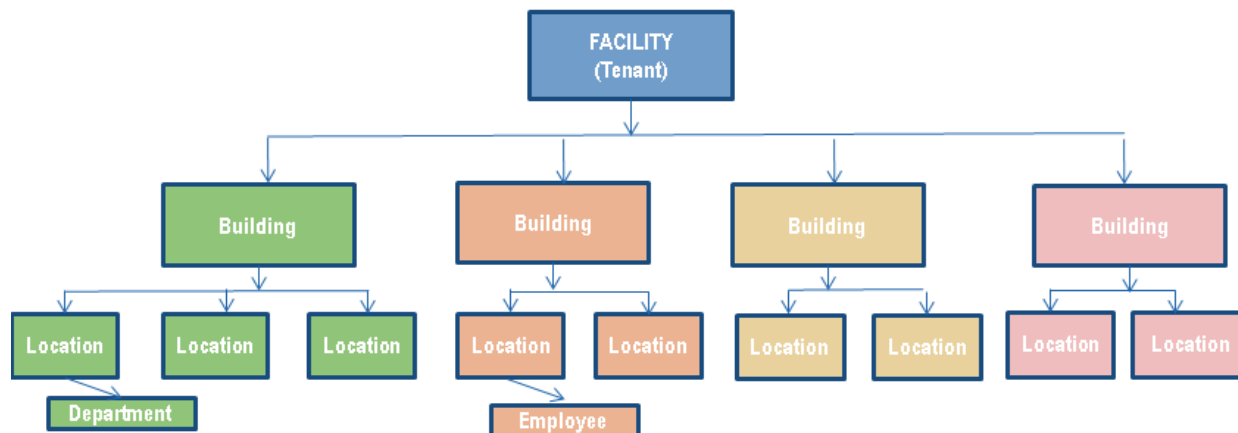
   You will see the following home page:
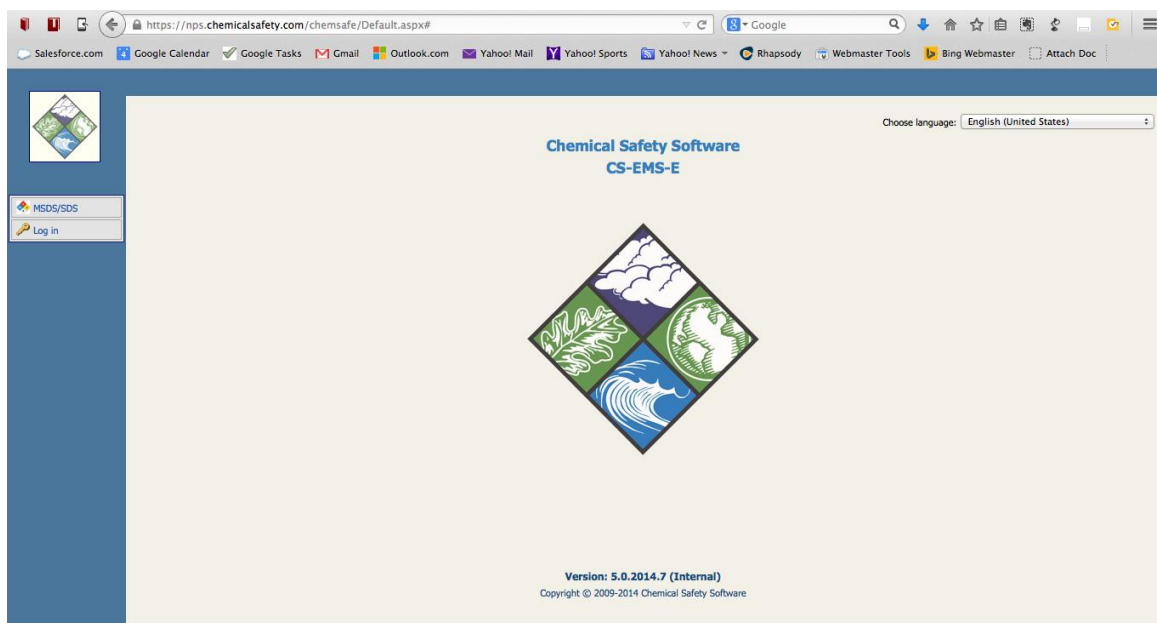
2. Click the **Log In** button on the left side of the screen. On the login screen, enter your user ID and password and then click on the **Log in** button:

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Section Two: EMS' Data Structure

DATA STRUCTURE AND HIERARCHY

Facility, Building & Location Hierarchy

The location hierarchy is the root of all EMS data. Since it involves mainly stable information (addresses, building numbers, etc.), it rarely needs to be updated. The facility hierarchy consists of the following databases:

- **Facility:** usually refers to the broadest description of the site of an organization, such as the name of the organization or one of its headquarters' locations. You can enter unlimited facilities, but at least one facility record must be created before you can enter any other location data. There are four facilities at NSAM:
    - NSAM Main BASE
    - NSAM NAVY Annex
    - NSAM La Mesa Village
    - Camp Roberts

  Chemical Inventory Regulatory Reporting is Prepared and submitted to the California Electronic Reporting System (CERS) by facility.

- **Building:** refers to an actual physical building where materials are utilized and stored. A facility record must exist in order to create building record. At NSAM, all buildings have been listed by number for consistency and accuracy, but there is an additional field in the building record called synonym that can be used to search for building information by name. For example, Building 232 has a synonym of Spanagel Hall.

- **Location:** allows you to enter in great detail where a material can be stored and found, including the floor, room number, and location description (such as a particular shelf, drawer or cabinet). Locations illustrate how the facility and building information are linked directly to each other, as it requires that there be at least one record for each database above it in the hierarchy. You cannot create a location record without first linking a facility and building record to the location. You can create multiple storage locations within a single room. The field called Location/Desc. is a required field in Location and the place where the specific location is identified in detail.

- **Department:** Departments within an organization can be used to further categorize chemical locations. The department table is a user-created and managed table that can be accessed from the EMS location table. Departments within NSAM are entered in the Location record for easy data searching and data separation purposes.

Other Related Databases

There are five other databases linked to the facility hierarchy that you should be familiar with before moving on:

- **Employee**: contains information such as employee names, titles, locations, responsibilities, and phone numbers. ID numbers and photos, and medical and personal information can also be stored in this database. It is linked with the Inventory database and facility hierarchy, which list the responsible persons for location and material inventory data.
- **Container:** describes exactly what materials are stored in which locations by individual container. After an inventory record is created, it will automatically link itself to the appropriate MSDS and chemical reference record(s). Note that you can enter multiple identical containers in the container table by entering the number of containers in this field. When the record is saved, EMS will automatically create several container records with sequentially numbered barcodes.

BARCODE	COMMON NAME	LOCATION	ROOM	CAS#	TOTAL QTY	UOM	# OF CONT.	(M)SDS	
40944	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40945	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40946	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40947	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40948	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40949	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40950	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40951	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40952	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40953	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40954	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>
40955	Chloramine T	LAB 1	100	7080-50-4	1	LITERS	1	(M)SDS	>

- **Chemical Inventory:** provides a summary view of all identical chemicals that are at a specific location. Identical containers are containers of a specific chemical by a specific manufacturer with the same physical state. If you are entering a new material into the system, a new MSDS record must be created first before chemical inventory container data can be added.
- **MSDS:** contains information from the chemical manufacturers Material Safety Data Sheet, including the components of an MSDS product. You can also access an MSDS image or text file in this database. The MSDS name field is linked to the chemical inventory record as the Product/ Chemical Name.
- **Chemical Reference:** describes each component. It contains NFPA labels, HMIS information, and CAS numbers, percent's, regulatory data, and provides fields for detailed information about each chemical. The Chemical Reference database is linked to the Chemical Name field in the Inventory Record.

Together these databases will help you to track inventory, as well as provide you with access to the chemical and safety information associated with them.

Section Three: EMS' Help Functions

When logged into EMS, the start screen will display the **Main Menu** on the left side of the screen and EMS' default **Quick Start Menu** in the center of your screen. Place the mouse over any of the icons and click on the question mark that appears to open a help menu for that icon.
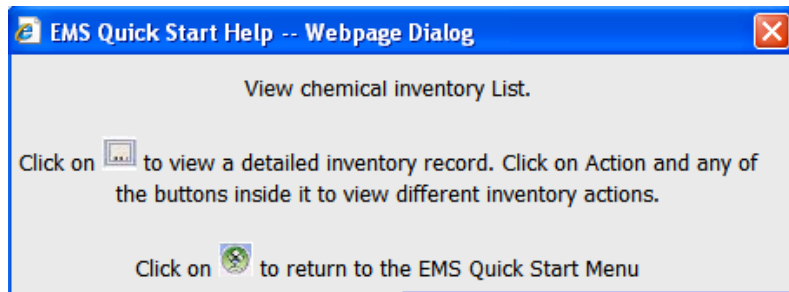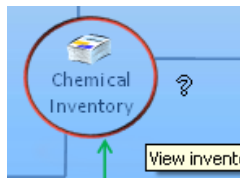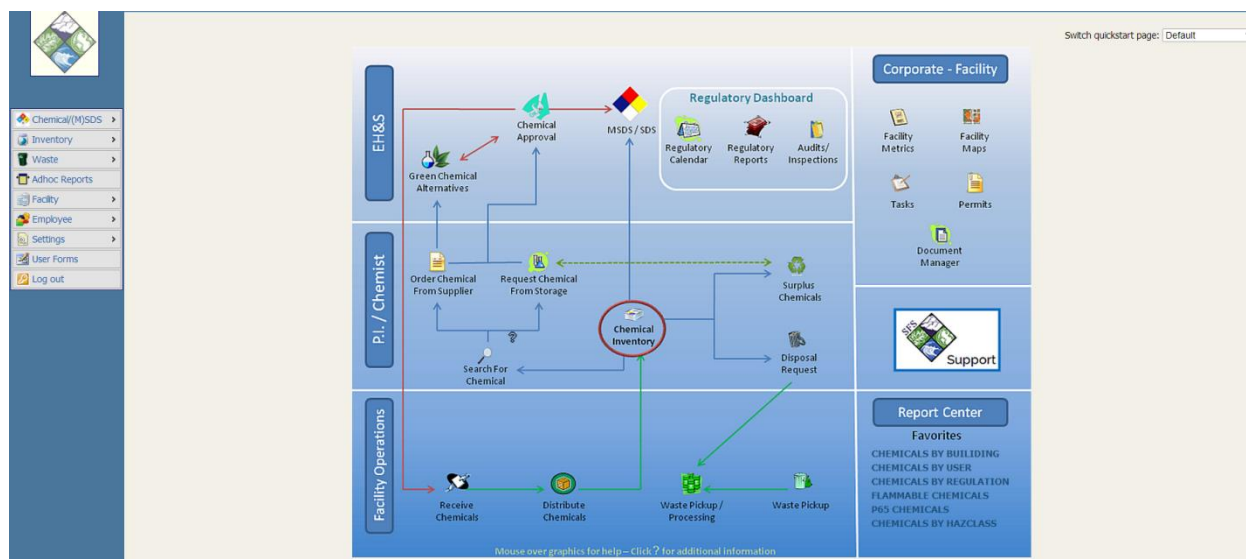

Help screens can also be accessed from the menu (upper right) of the EMS's detail and search screens.
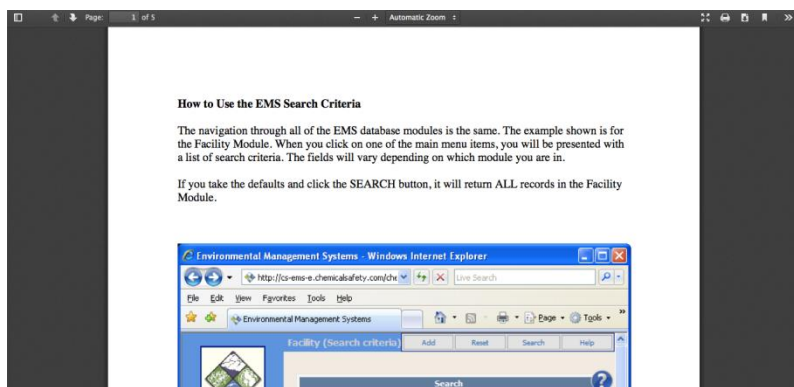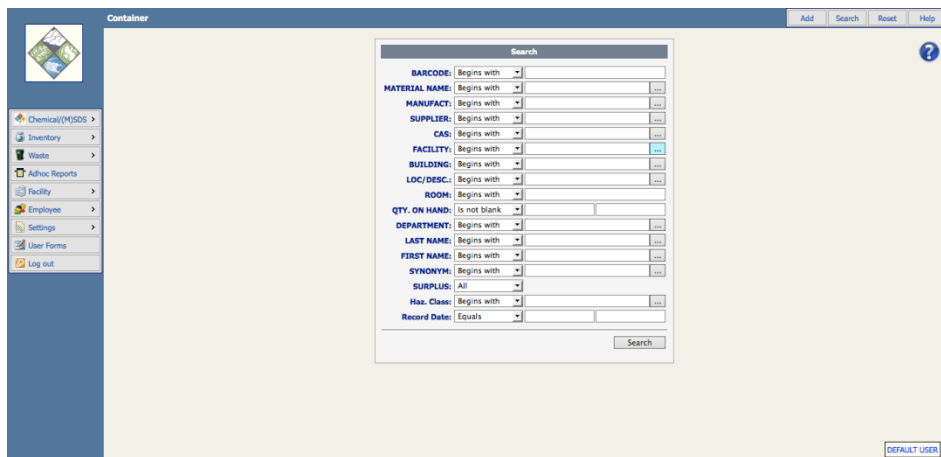
Section Four: EMS' Menu and Navigation System

Once you have logged into EMS, the start screen will display the **Main Menu** on the left side of the screen and EMS' default **Quick Start Menu** in the center of your screen. Click on any of the icons to launch that function. For example, click on the **Chemical Inventory** icon to view a list of chemical inventory records belonging to the user that is logged in.

Additional quick start screens can be accessed from the "Switch Quickstart Page" dropdown list. For example, the P.I./Chemical User screen contains links to common tasks that chemical handlers perform.
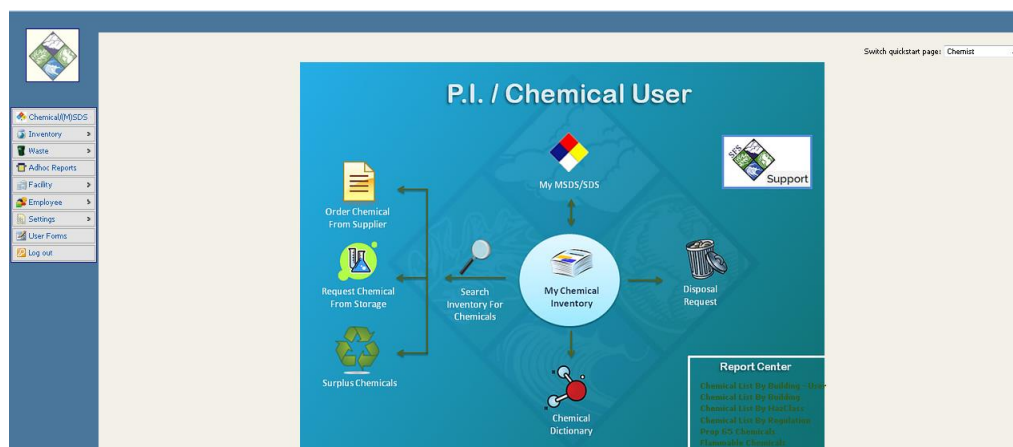
Main Menu

Use the menus on the left to access EMS' various forms and functions.
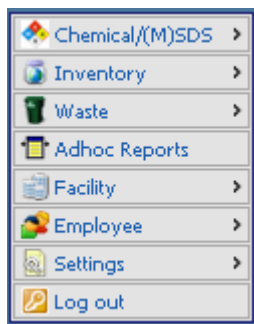
Chemical/MSDS: Manage (M)SDS information, view hazard and chemical reference information for the MSDS.

Inventory: Manage material inventory information.

Waste: Manage on and off site waste disposal.

Adhoc Reports: Create, run, view and print user defined reports.

Facility: Manage facility, building and location information.

Employee: Manage human resources info including employee training and incidents/accidents.

Settings: Configure user settings.

Log Out: End your session and log out of the EMS Web Interface.

Default Quick Start Menu

Use the **Quick Start Menu** to access user-specific information.
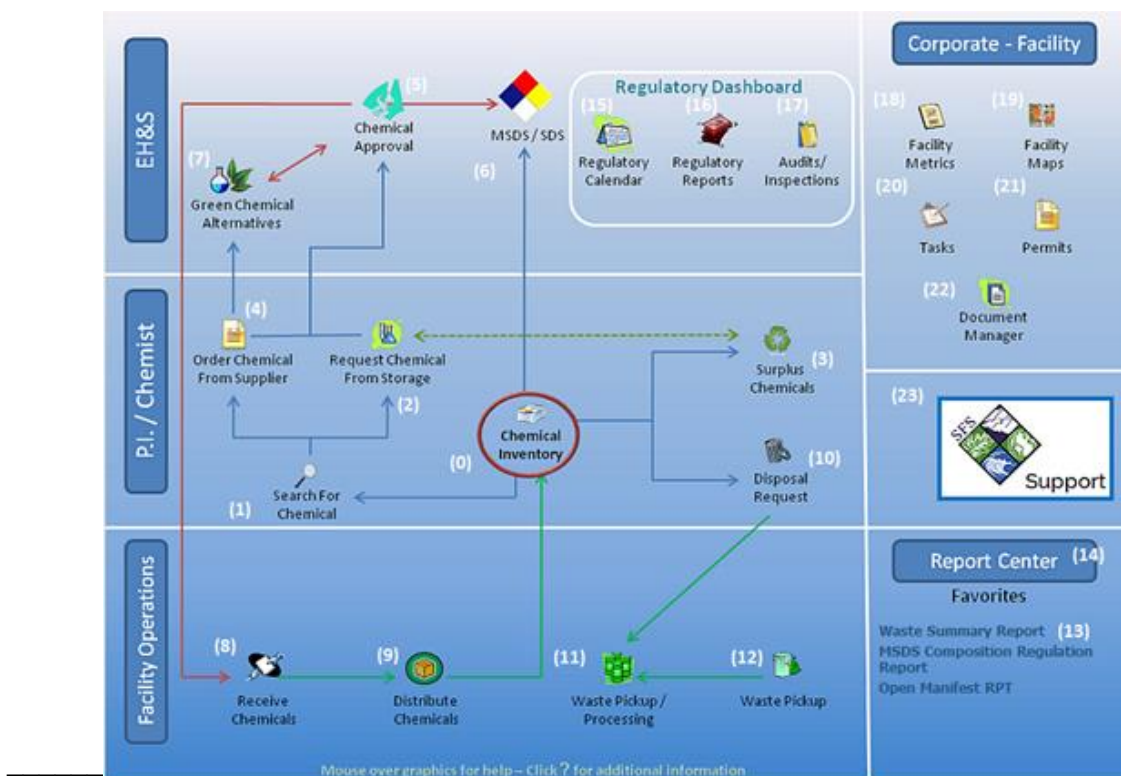
The **Quick Start Menu** is segregated into five areas of access and operation. The three areas on the left are set up for specific operation functions as follows:

 P.I./Chemist Quick Start Menu Segment: Includes typical functions that a person handling chemicals would need to access the EMS software for, namely to review/ update their own inventory, search for and/or order a chemical and request that a chemical be picked up for disposal.

 EH&S Quick Start Menu Segment: Designed to allow EH&S personnel to access and update information as well as to perform regulatory related functions.

 Facility Operations Quick Start Menu Segment: Allows facility personnel to manage incoming chemicals and process, store, and dispose waste.

The two areas on the right are designed for use by a cross-section of the organization to access and review EMS data as needed:

 Designed for designated personnel to review corporate data functions.

 Designed to display user-specific reports that individual users may want to run repeatedly (favorite reports).

Quick Start Menu Functions

 Quick access to the user's current inventory on hand.

 Search for chemicals within a facility, or place a new order.
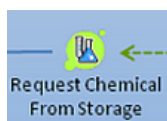
 Search for and reserve chemicals from the company's chemical storage or surplus.

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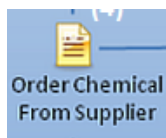
Order Chemical From Supplier — Search for and order a chemical from a product supplier.

Chemical Approval — Manage the Chemical Approval Process

MSDS / SDS — Access and manage material safety data sheets (M)SDS

Green Chemical Alternatives — Manage green chemical alternatives

Receive Chemicals — Process incoming chemicals

Distribute Chemicals — Deliver and distribute incoming chemicals
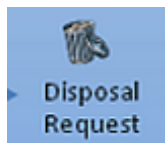
Disposal Request — Request for chemical(s) to be picked up for disposal

Waste Pickup / Processing — Pickup chemicals designated for waste disposal

Waste Pickup — Manage new waste recording and processing

Designate user-specific favorite reports

List of User or Group Favorite Reports

Regulatory functions

Links directly to the online EMS support page

Corporate – Facility functions

Navigational Tools

You can use the navigational tools at the top EMS' detail screens to move to a different record, to add a record, to edit a record, to transfer a record, to view and print labels, etc.
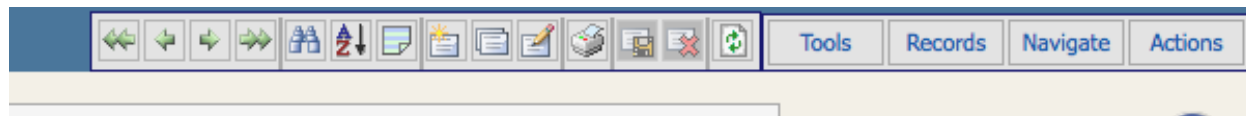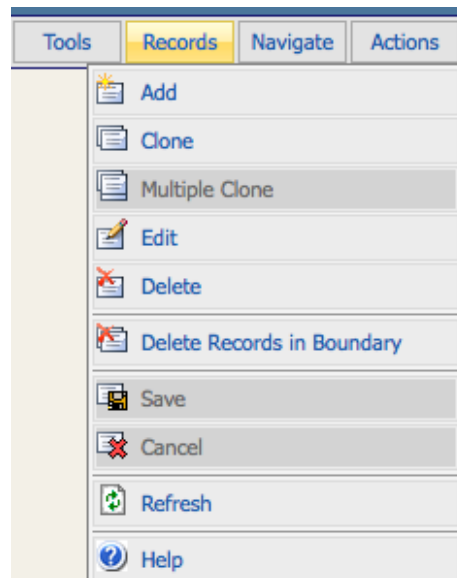
Navigational Menu Functions

Go to the first record in the group of records that resulted from a search

Go to previous records

Go to next record

Go to the last record in the group of records that resulted from a search

Perform a new search

Sort the records that resulted from a search

Toggle between a single record and the record list

Add a record

Clone (Duplicate) a record

Edit an existing record

Print a summary page of the record

Save a record that is being added or edited

Cancel adding a record or changes made to an existing record

Refresh record on screen

NAVIGATIONAL MENUS

The navigational menus to the right of the navigational tools allow you to do many useful functions like setting chemical containers as surplus, moving chemicals to different labs or locations and making waste pickup requests, among many other functions. These buttons also give you the option of viewing and printing reports and labels, looking at container history, and viewing chemicals on a map.

Tools	Records	Navigate	Actions

Print

Reports

Quick Management Report

Restore Record

View Log

Export to Excel

Tools	Records	Navigate	Actions

Add

Clone

Multiple Clone

Edit

Delete

Delete Records in Boundary

Save

Cancel

Refresh

Help

Tools	Records	Navigate	Actions

Search

Set Boundary ON/OFF

Sort Order

Toggle Browse ON

Show All

First

Previous

Next

Last

Tools	Records	Navigate	Actions

Labels →

Container Transactions →

Import-Export Excel →

Container History

Display MSDS/SDS

Section Five: EMS' (M)SDS Module

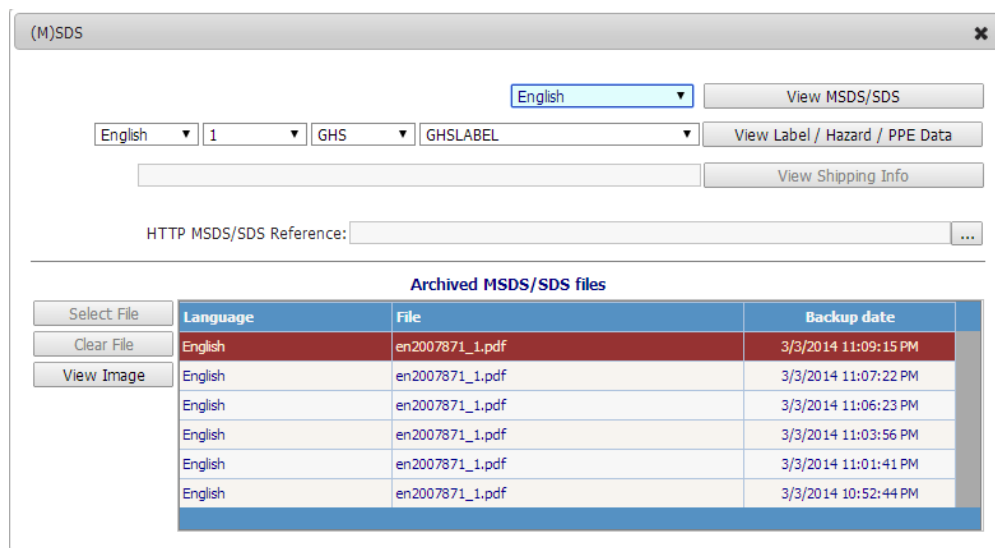## Viewing Material Safety Data Sheets (MSDS)

To view (M)SDS data, navigate to the container list screen and click the [(M)SDS] button to the right of the container. You can navigate to the container list by returning to the quick start screen and searching the chemical inventory (refer to the "How to Search for Chemicals in Your Inventory" section on page 23**).**

Note: To return to the Quick Start Screen, click on the Chemical Safety logo at the top left of the page.

The (M)SDS detail screen will appear.

Click on [View MSDS/SDS] to view the PDF (M)SDS file for this chemical. Note that prior (M)SDS versions for this chemical may also be available and can be viewed from the Archived MSDS/SDS files area- highlight one of them and click the View Image button.

Viewing a GHS Label
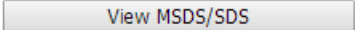
To view a GHS label, simply click the ![View Label / Hazard / PPE Data] button in the third tab.

(M)SDS DETAILS

If you want to obtain additional information about a chemical's properties, regulatory data, and safety data, you can click on the Chemical/ (M)SDS button on the left of your screen and search for the chemical.

The (M)SDS detail record screen has five tabs on top, starting with the **Product Data** tab on the first screen.

A lot of information can be reviewed and recorded in the different tabs. Different records may have more, or less data than other records, but all necessary information about a chemical can be recorded here. Many of the tabs are self-explanatory, and we are not going into more detail about them in this document.

How To Add a New (M)SDS

From the Product/MSDS/SDS screen click the Add button:

There are several tabs where data should be entered to create the record.

Product Data Tab

The first tab is named "**Product Data**" and several fields are required before a record can be saved. These required fields are highlighted in light red.

The required fields can be found in the Product and Company Information section of the MSDS/SDS:

- Type the Product Name exactly as shown in the (M)SDS/SDS document.
- Type the Manufacturer Name
- Enter the CAS Number or Chemical Name as follows:
  1. If the product is a pure chemical, enter its CAS Number or name in the corresponding field. If the chemical is found in the EMS Chemical Dictionary, it will auto-populate the name or CAS. The following message will then appear:

     Select yes to have data from the chemical reference database automatically populate the MSDS record, or no if you have already populated or plan to populate the record manually. **Warning: Auto-populating from the chemical reference database will override any existing data that already exists in the record.**

  2. If the product is a mixture with multiple chemicals, enter the product name in the Product/Chemical Name field and leave the CAS number blank. After you save the record, you can then go to the Composition Tab of the MSDS and Enter chemical components of the mixture. *Note: you need to first save the record before you can add chemical components.*

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- If it can be found in the (M)SDS, replace the MSDS/SDS number, which EMS assigned sequentially, with the manufacturers (M)SDS/SDS number or product number.
- Enter the (M)SDS/SDS last revision date from the document.

SIGMA-ALDRICH

Material Safety Data Sheet
Version 4.4
Revision Date 02/04/2013
Print Date 02/26/2013

1. PRODUCT AND COMPANY IDENTIFICATION

Product name	:	Acetone
Product Number	:	179124
Brand	:	Sigma-Aldrich
Supplier	:	Sigma-Aldrich 3050 Spruce Street SAINT LOUIS MO 63103 USA
Telephone	:	+1 800-325-5832
Fax	:	+1 800-325-5052
Emergency Phone # (For both supplier and manufacturer)	:	(314) 776-6555
Preparation Information	:	Sigma-Aldrich Corporation Product Safety - Americas Region 1-800-521-8956

3. COMPOSITION/INFORMATION ON INGREDIENTS

Formula	:	C_3H_6O
Molecular Weight	:	58.08 g/mol

Component		Concentration
Acetone		
CAS-No.	67-64-1	-
EC-No.	200-662-2	
Index-No.	606-001-00-8	

The highlighted fields of the sample (M)SDS document shown above in Sections 1 and 3 are the ones that need to be entered.

Comp/Regs/Misc Tab

Click on the second tab, named **Comp/Regs/Misc**. This tab contains additional data relating to the chemical including synonyms, associated projects and facilities, regulations, part numbers, locations, and green chemical alternatives.

To add data to any of these tabs, click on the tab first, then right-click on the record and select **Add**. *Note: for chemical composition only, you must save the record first before adding any chemical components.*

The same procedure (right click -> Add) applies to the remaining tabs (Synonyms, Project, Facility, etc.)

(M)SDS Image Tab

Click on the third tab named **(M)SDS Image** to upload the (M)SDS' pdf file.

You will then see the **Select File** dialog box from which you can attach and upload the (M)SDS pdf file. *Note: the system supports numerous other graphic file formats aside from pdf.*
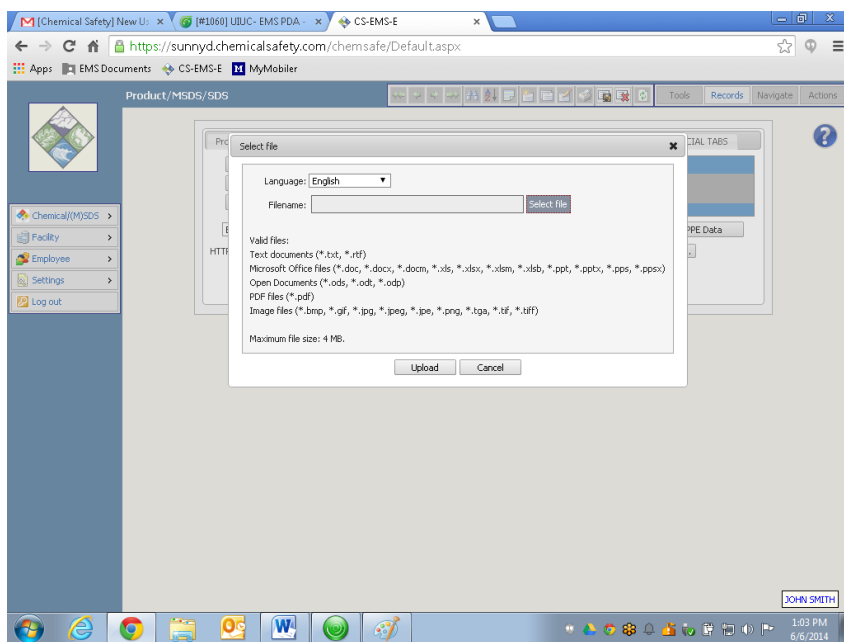
Chemical Ref Data Tab

The **Chemical Ref Data** tab contains additional fields relating to the chemical substance.

Environmental Tab

You can enter GHS data from the **Environmental** tab. This information can be found in section two of the (M)SDS/SDS: Hazards Identification. Enter GHS information and other hazard information as follows:

Click on the table button ... next to H Phrases. Click on all of the H Phrases that correspond to the H Phrase codes for the product. Scroll to additional pages on the bottom right of the H Phrase Code table as needed to select additional H Phrase codes for the product.
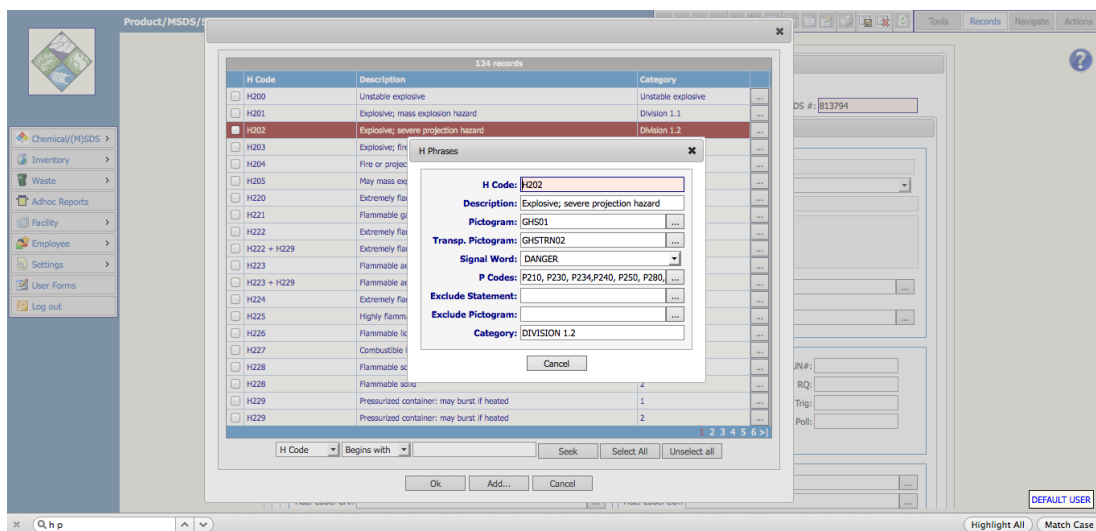
When the H Phrase codes are selected, EMS automatically populates the following GHS fields:
- Category
- Signal Word
- Hazard Class
- Hazard Statements
- P Phrase Codes
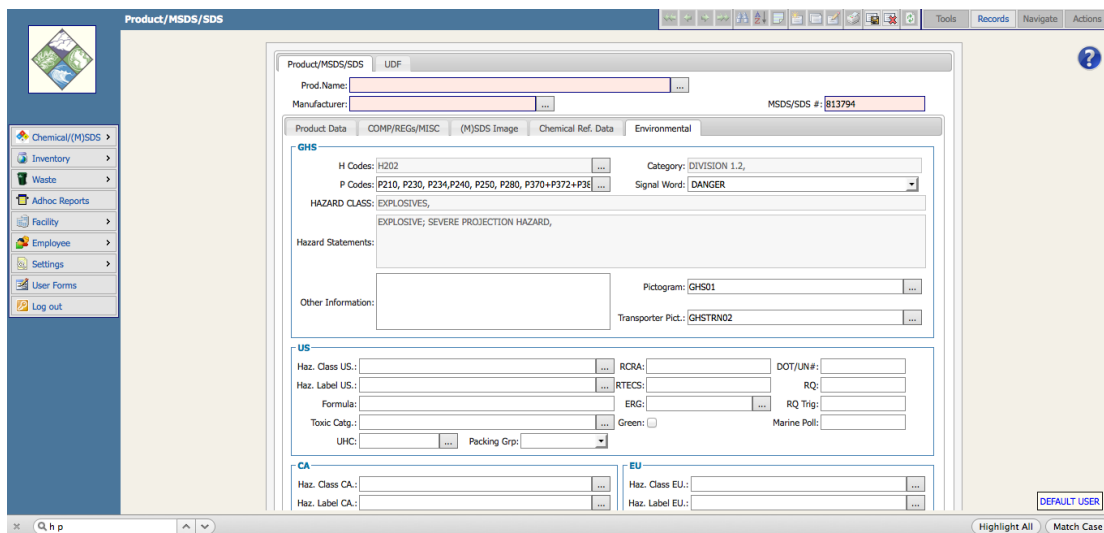
NOTE: Although EMS automatically completes data for the above fields, only the manufacturer data from the (M)SDS/SDS document qualifies as the correct information for hazard data associated with this (M)SDS. It is therefore critical that you compare the data that EMS populated the GHS and other hazard fields with and make necessary changes or corrections.

Entering Additional Hazard Data

Enter all Hazard-related data that is found in Section 2 of the (M)SDS/SDS record. OSHA and NFPA Hazards are the most important.

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2. HAZARDS IDENTIFICATION

Emergency Overview

OSHA Hazards
Flammable liquid, Target Organ Effect, Irritant

Target Organs

Liver, Kidney

GHS Classification
Flammable liquids (Category 2)
Skin irritation (Category 3)
Eye irritation (Category 2A)
Specific target organ toxicity - single exposure (Category 3)

GHS Label elements, including precautionary statements

Pictogram

Signal word   Danger

Hazard statement(s)
H225   Highly flammable liquid and vapour.
H316   Causes mild skin irritation.
H319   Causes serious eye irritation.
H336   May cause drowsiness or dizziness.

Precautionary statement(s)
P210   Keep away from heat/sparks/open flames/hot surfaces. - No smoking.
P261   Avoid breathing dust/ fume/ gas/ mist/ vapours/ spray.
P305 + P351 + P338   IF IN EYES: Rinse cautiously with water for several minutes. Remove contact lenses, if present and easy to do. Continue rinsing.

Other hazards
Repeated exposure may cause skin dryness or cracking.

HMIS Classification

Health hazard:	2
Chronic Health Hazard:	*
Flammability:	3
Physical hazards:	0

NFPA Rating

Health hazard:	2
Fire:	3
Reactivity Hazard:	0

Health hazard:	2
Fire:	3
Reactivity Hazard:	0

Potential Health Effects

|	
Inhalation	May be harmful if inhaled. Causes respiratory tract irritation. Vapours may cause drowsiness and dizziness.
Skin	May be harmful if absorbed through skin. Causes skin irritation.
Eyes	Causes eye irritation.
Ingestion	May be harmful if swallowed.

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Section Six: EMS' Inventory Module

The Difference Between Inventory Records and Container Records

Container records are unique containers that are stored within EMS to allow for the tracking, storage, movement and disposal.

Inventory records are designed to provide users with a grouped container view for identical chemicals that are in the same location and have the same container size.

Viewing Chemical Inventory Records

From the EMS main menu, select **Inventory -> Chemical Inventory**.
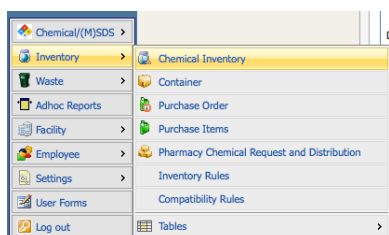
You will then see a search screen that you can enter any number of search criteria to locate the chemical you are looking for. If you leave all of the search fields empty, and click on search, EMS will return all of the chemicals held in inventory.

COMMON NAME	VENDOR	BUILDING	LOCATION	ROOM	FACILITY	CAS#	TOTAL QTY	UOM	# Of	(M)SDS	
063 Alkaline Bathroom Cleaner & Disinfectant	ECO Labs	TRAINING BUILDING-LAB	LAB 1	100	TRAINING FA		0	LITERS	0	(M)SDS	>
063 Alkaline Bathroom Cleaner & Disinfectant	ECO Labs	Dining Services	2-Blue		NGIS		14	LITERS	7	(M)SDS	>
100% Silicone Auto/Marine Sealant	DAP	SP-232	MagLab-419		NPS		1	OZ	1		>
100% Silicone RTV Adhesive Sealant	Polymeric Systems	RO-235	266D-Shop		NPS		1	OZ	1		>
2 Cycle oil	Homelite	Gym Maintenance Shed	Ballfield-Yellow		NSAM Morale		12	OZ	1		>
2 Cycle oil	Chevron	Gym Maintenance Shed	Ballfield-Yellow		NSAM Morale		16	OZ	1	(M)SDS	>
2 Cycle oil	Chevron	TRAINING BUILDING-LAB	LAB 2	200	TRAINING FA		16	OZ	1	(M)SDS	>
2 Cycle oil	Chevron	TRAINING BUILDING-LAB	LAB 2	200	TRAINING FA		16	FL OZ	1	(M)SDS	>
2 Ton Epoxy S-33/333 45 Hardener	ITW Devcon	HA-234	MachShp101		NPS		1	OZ	1		>
2 Ton Epoxy S-33/333 45 Resin	ITW Devcon	HA-234	MachShp101		NPS		1	OZ	1		>
22 Stabilant 22, 5ml = 30 ml	Micro-Tools	SP-232	Shop-325		NPS		1	ML	1		>
2-BUTOXYETHANOL	ALDRICH CHEMICAL	HA-234	Mat'lSci-228D		NPS	112-07-2	1	LITERS	1	(M)SDS	>
2-Cycle Lube	Bel R / Chevron	HA-234	UV-Bsmt		NPS		2	OZ	1		>
2-IN-1 PRIMER, WHITE 4633	TRANSTAR AUTOBODY TE	BU-233	306		NPS		0	OZ	1	(M)SDS	>
2-Propanol	Aldrich Chemical	WA-245	Mat'lSci-223		NPS		3	LITERS	1		>
3D Supreme Concentrate	3D Inc.	214	TurboLab		NPS		2	GALLONS	1		>
3-In-1 Multi-Purpose Oil	WD-40 Company	HA-234	SRDC-036		NPS		1	OZ	1	(M)SDS	>
3-In-1 Multi-Purpose Oil	WD-40 Company	HA-234	SRDC-036		NPS		1	OZ	1	(M)SDS	>
3-In-1 Oil #10034	WD-40 Company	HA-234	UV-Bsmt		NPS		2	OZ	1	(M)SDS	>
3M Brand™ Super Adhesive 77	3M Company	SP-232	Shop-325		NPS		0	OZ	1		>
3M Brand™ TFE Silicone Spray Lube	3M Company	SP-232	Shop-325		NPS		5	OZ	1		>
3M Spray Adhesive	3M	507	Hanger		NPS		2	GRAM	1		>
3M Spray Adhesive Hi Strength 90	3M Company	CR-05	F-01		NPS		2	OZ	1	(M)SDS	>
3M Spray Adhesive Super 77	3M Company	CR-05	F-01		NPS		1	OZ	1	(M)SDS	>
3M™ Weatherstrip Super Black Adhesive	3M Company	SP-232	Shop-325		NPS		0	OZ	1		>

From the inventory item list screen, you have the option of viewing (and printing) an (M)SDS associated with each chemical inventory record. You can also view the detailed chemical inventory record by clicking the arrow (>) to the right of each list item.

## Chemical Inventory Detail Screen Navigational Tools

Notice the navigational buttons at the top of the inventory record detail screen. You can use these navigational tools to move to different records, add records, edit the current record, transfer the current record, or to view and print labels.
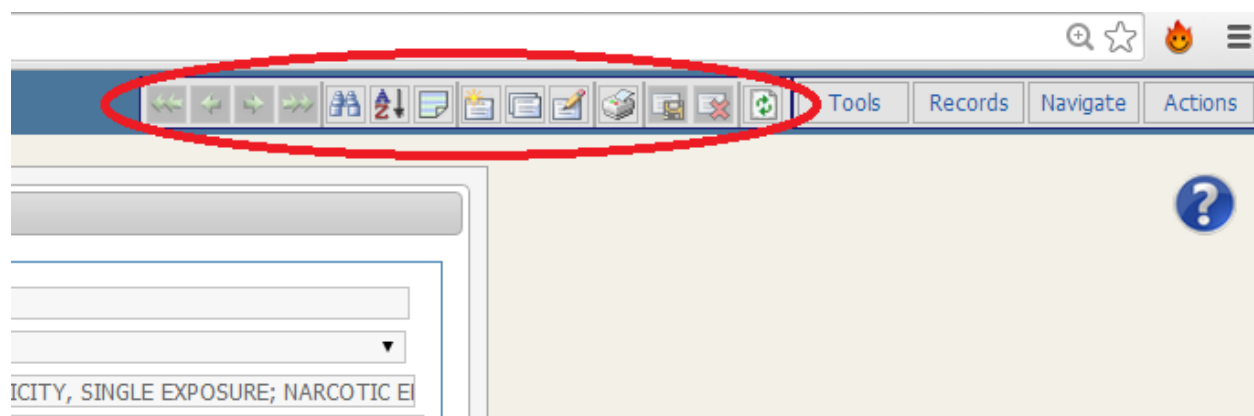
Viewing Container Records

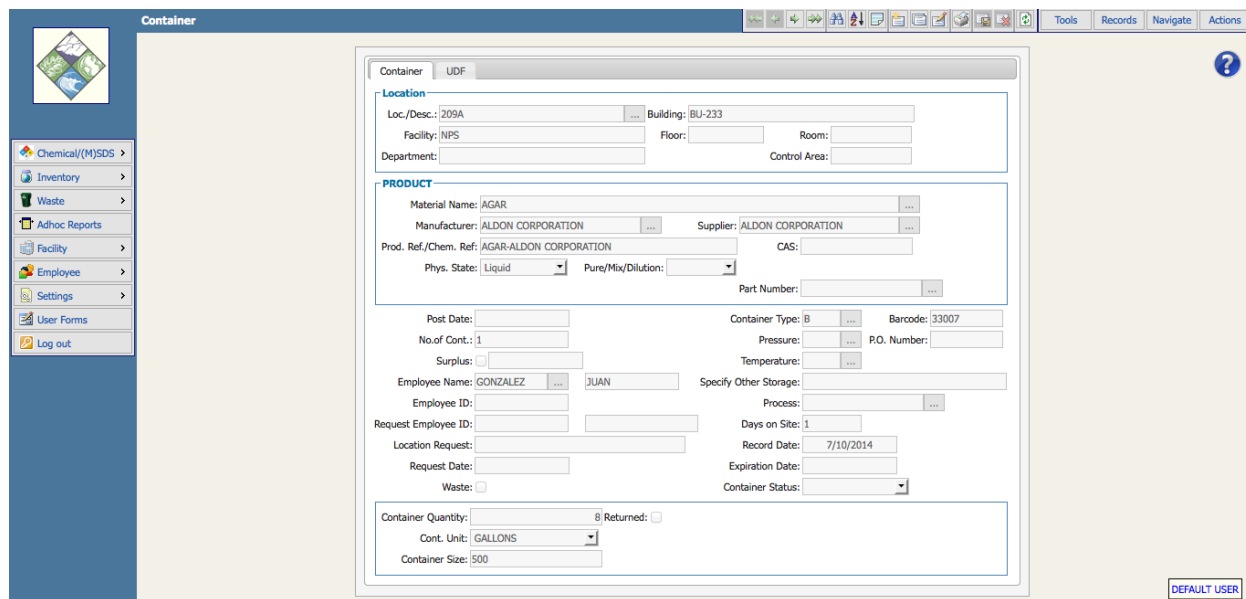From the EMS main menu, select **Inventory -> Container**.
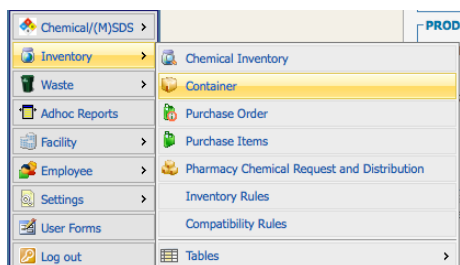
Alternatively, you can click on **Chemical Inventory** from the quick start screen. You will then see a search screen where you can enter any number of search criteria to locate the container that you are looking for. Again, if you leave all of the search fields empty, and click on search, EMS will return all of the containers held in inventory.

BARCODE	COMMON NAME	LOCATION	ROOM	CAS#	TOTAL QTY	UOM	# OF CONT.	(M)SDS	
33007	Agar	209A			8	GALLONS	1		>
33008	Elmer"s Multipurpose Glu	Corrosn-238			1	OZ	1		>
33009	Iodine Solution, Tincture	209A			1	ML	1		>
33010	Plexus Plastic Cleaner	SRDC-021C			1	OZ	1		>
33011	Dow Corning High Vacuu	209A			1	GALLONS	1		>
33012	High Vacuum Grease	Corrosn-238			1	OZ	1		>
33013	Ethyl Alcohol	209A			1	ML	1		>
33014	Vacuum Pump Oil	209A			4	OZ	1		>
33015	Mechanical Pump Oil 01-	Corrosn-238			2	LITERS	1		>
33016	Potassium Chloride in Wa	209A			2	ML	1		>
33017	Sodium Chloride in Wate	209A			5	ML	1		>
33018	Glycine (Simulated Urine	209A			4	ML	1		>
33019	Tyienol	209A			12	GALLONS	1		>
33020	Universal pH Indicator	209A			2	ML	1		>
33021	Unknown Drug B - Tyien	209A			12	GALLONS	1		>
33022	Aluminum	Corrosn-238		7429-90-5	1	GALLONS	1	1	>
33023	CHROMIUM	Corrosn-238		7440-47-3	1	GALLONS	1	(M)SDS	>
33024	Iron	Corrosn-238		7439-89-6	1	GALLONS	1		>
33025	Molybdenum	Corrosn-238		7439-98-7	1	GALLONS	1		>
33026	TITANIUM	Corrosn-238		7440-32-6	1	GALLONS	1	(M)SDS	>
33027	HELIUM	209A		7440-59-7	1	CUFT	1	(M)SDS	>
33028	HYDROGEN	209A		1333-74-0	1	CUFT	1	(M)SDS	>
33029	Acetylene Black (Carbon	Corrosn-238		1333-86-4	2	GALLONS	1		>
33030	Carboxymethyl Cellulose	Corrosn-238			2	GALLONS	1		>
33031	Lithium Iron Phosphate (	Corrosn-238		15365-14-7	1	KILOGRAMS	1		>

Viewing Container Details

To view or manage container details, click on the [>] button located to the right side of the chemical inventory list. You can navigate to the container list by returning to the quick start screen and searching the chemical inventory (refer to the **How to Search for Chemicals in Your Inventory** section above**).**


The container screen is organized so that the top part displays **where** a chemical is located. The middle portions display **what** the chemical is, to **whom** the container is assigned, **when** the container was entered and accessed, and other details about the container. The bottom portion of the form displays the **quantity and size** of the container.

Container Detail Screen Navigational Tools

Notice the navigational buttons at the top of the container detail screen. You can use these navigational tools to move to different records, add records, edit the current record, transfer the current record, or to view and print labels.
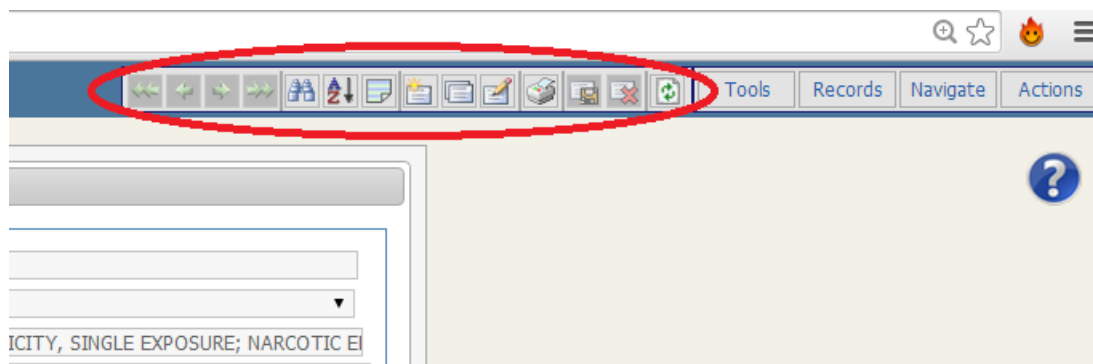
The navigational buttons to the right of the form allow you to do many useful functions like setting chemical containers as surplus, moving chemicals to different labs or locations, and making waste pickup requests. You also have the option of viewing and printing reports and labels, looking at container history, and viewing chemicals on a map.
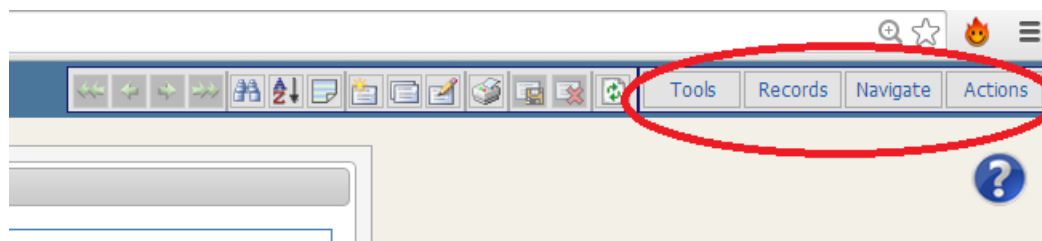
Adding a Chemical Container to Inventory

There are several ways to add new chemical inventory data into EMS. The two most common methods are using the **Add** option to add new container information, and the second is to use the **Clone** option, which allow you to clone (duplicate) an existing container, make minor data changes as needed, and then save the record. The **Clone** option is a convenient way to add similar information to what's already in the database with minimal data entry.

Adding a New Container

Start by clicking on the [Chemical Inventory] button from the quick start screen**.** Then click the **Add** button, from the menu at the top right of the screen.

Enter all of the relevant information for the container.

NOTES:
- Several fields are automatically populated in the record, based on the user's log-in information.
- Data can be changed by clearing the field, then typing new information or selecting information by clicking on the ⬚ button next to many of the fields on the form.
- Fields in pink are required fields and the record cannot be saved until data has been entered for them.
- EMS has a "type-ahead" option for all fields that have a ⬚ button. As you type letters, the system automatically searches the database and displays data that corresponds to the letters entered. You can then select one of the data records displayed without having to type the entire field.
- If entering multiple identical containers for the same chemical, you can increase the **No. of Cont.** field from one to a higher number. EMS will create individual records with sequential barcodes so you don't have to enter the containers one by one.

To save the record, click the **Save** button or click **Records -> Save** from the menu options on the top right of the screen.
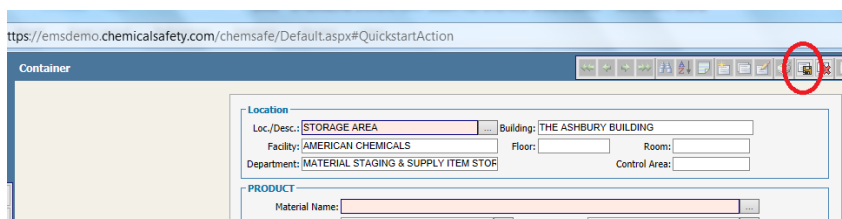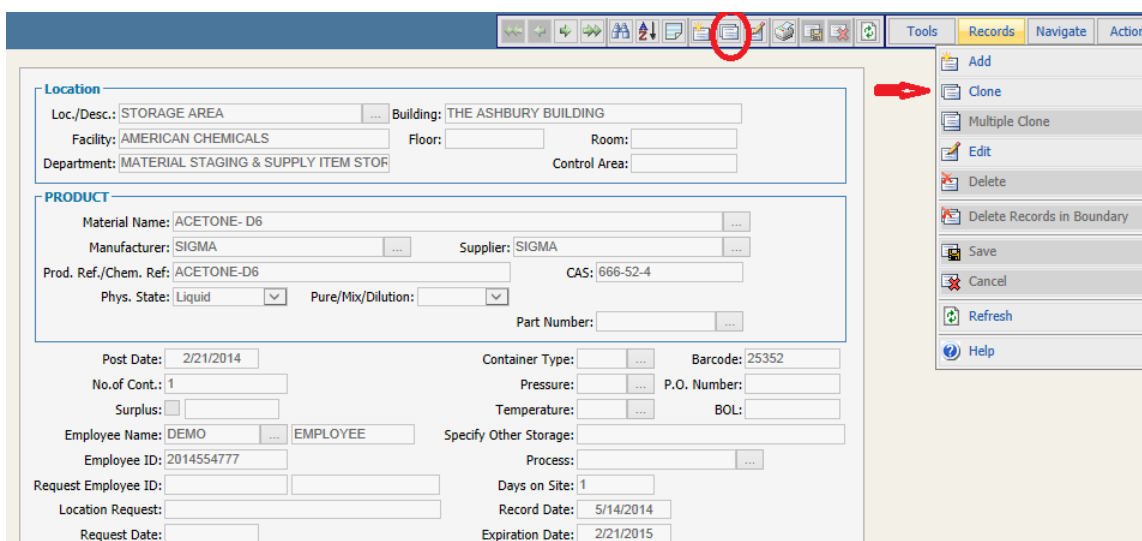
Cloning an Existing Container

Click on the [>] to open the container record that you want to clone.

Click the **Clone** button or click **Records -> Clone**.

The system automatically assigns a new barcode number (which can be changed as needed). Change whatever data is appropriate to change, including quantities and "Post" date and save the record by either clicking the **Save** button or clicking **Records -> Save** from the menu options on the top right of the screen.

Find Chemical Containers that are Not Assigned to You

Click **Search for Chemical** in the P.I./Chemist section of the default quick start screen. On the search screen that opens, your information will be filled in automatically. These fields will help you search for one or multiple chemicals at your facility, or request for them to be ordered if your facility does not have the chemical.

- Type in the chemical name you wish to search for and then click the **Submit** button. You can also search by any of the other fields by typing into them and clicking the **Submit** button.
- Click the **Storage** check-box, then click **Submit** to search for this chemical in a storage location
- Click the **Surplus** check-box, then click **Submit** to search for containers of this chemical that have been labeled as surplus.
- Click the **Green Chemical** check-box to search for ONLY Green Chemicals.

A list of containers that match what you searched for will be displayed at the bottom of the screen:

Click the check-box next to the container(s) you wish to request, and then click the **Request** button.

How to Receive New Chemical Orders into EMS

From the Facility Operations section of the default quick start menu, click on the **Receive Chemicals** icon. A list of all OPEN chemical orders will be displayed:

- Click the **MSDS** button to the right of any record to see its MSDS/SDS.
- Click the > button to the right of a record to view and receive the containers into EMS.
- Select from the top right of the screen: Actions/Transaction/Receive/This Record.

A receiving screen will open like the one below:

- EMS has assigned the next barcodes available to these containers. The barcode will be displayed in the **Barcode** field.
- The system will show that all containers ordered are being received. If this is incorrect, make the necessary changes.
- To leave the record open, un-check the **Close Order** check-box.
- If the order should be received into the ordering person's location, check the **Receive in My Location** check-box.
- If the Order should be received into a receiving area instead, check the **In Receiving Area** check-box.
- Make any changes necessary and then click the **Ok** button.

You will see a confirmation message, and the containers will appear on the **Receiving** tab of the **Purchase Item** screen.

If you click on **Chemical Inventory** from the main Quick Start Menu, you will see the new containers on the list.

How to Distribute (Deliver) Containers that were Requested by Users

From the Facility Operations section of the default quick start menu, click on the **Distribute Chemicals** icon. A Purchase Item screen will open, with your information automatically filled in.

Click on the **Reserved Container Items** tab. Enter a Request Date-From and Request Date-To if you wish to search for Requests for a range of dates. Click the **Submit** button.

Or, just click the **Submit** button without entering any data in the fields, to see all open Requests. All Requests matching your search criteria will be displayed.

Click the check-box to the left of the container to be distributed/transferred and then click the **Checkout** button. You can then click on the **Chemical Inventory** icon from the quick start menu and you will see the list of Containers. Click on the > button to the right of the container that was just distributed to the user. You will see that the container now has the employee's name and request information. The container has also been transferred to the employee's location.

How to Transfer a Container to Another Location

Open the detail record of the container that you want to transfer. Select **Actions -> Container Transactions -> Transfer -> This Record** from the menu at the top right of the container record screen. The following screen will appear:
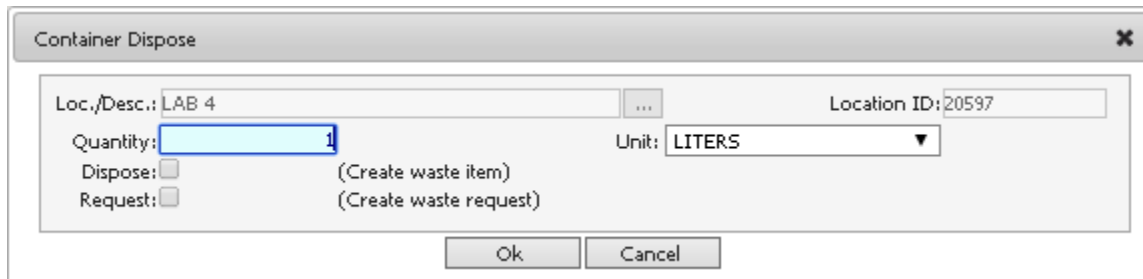

Using the type-ahead or look-up feature, select the new location in the **Loc./ Desc.** field. Once this field is populated the Location ID field will be filled in automatically. Lookup the receiving employee's last name in the **Employee Last** field. The employee first name and ID fields will then auto-populate. Leave Ignore Transfer Rules unchecked. Click OK when done.

How to Consume or Dispose of a Container

Open the detail record of the container that you want to transfer. Select **Actions -> Container Transactions -> Dispose/ Consume Quantities -> This Record** from the menu at the top right of the container record screen. The following screen will appear:

The Loc./Desc, Location ID, Quantity, and Unit fields will be prefilled with data from the container record. Select the **Dispose** checkbox if you wish to create a Waste item in the Waste module. Select the **Request** checkbox if you wish to create a waste pickup request in the Waste module.

How to Designate a Container as Surplus

Open the detail record of the container that you want to transfer. Select **Actions -> Container Transactions -> Surplus -> This Record** from the menu at the top right of the container record screen. The container record will then be updated and marked as surplus.

Section Seven: EMS Reports

How to View Reports

At the bottom right of the Quick Start Menu, under the heading **Report Center / Favorites**, 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 it. To see a list of all Ad-hoc reports, click the **Report Center** header. Alternatively, you can click on Ad-hoc Reports from the EMS main menu on the left side of the screen. You can then click on a specific report to launch a preview window.

Filtering Reports by Group

- Click on any of the listed groups under filtering. The Ad hoc reports system will list only the reports under that grouping

How to Print a Management Report

- Click on 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 preview and print.

Section Eight: EMS User Settings

These are functions that both Admin and Non-Admin users can access to change certain options specific to their own user id. EMS users can access and customize their settings from the main menu on the left side of the screen:
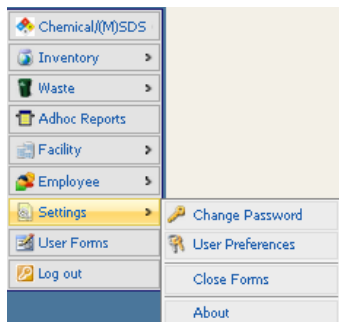
Select Settings -> User Preferences

Users can configure which quick start screen will launch when EMS starts as well as customize search and favorite report settings.
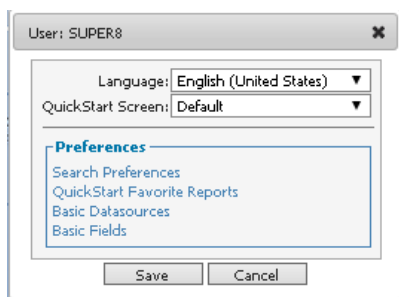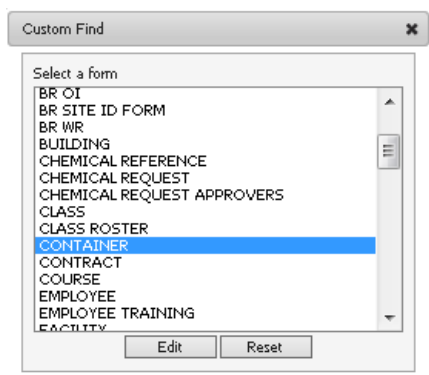
Search Preferences

The Search Preferences link allows the EMS user to customize individual search screens to suit their needs. Click on Search Preferences and select the search screen that you wish to customize by highlighting it and clicking on Edit.

From the Custom Find screen, users can add, remove and reorder search fields.

To add a field, click in the check-box on the left side. To delete a field, click on the red X on the right side. To move a field up or down, highlight the field on the right side and then click on Up or Down. Alternatively, fields can be dragged and dropped into the desired position/ order.

Configuring the Favorite Reports List

Users can configure up to six Crystal Reports or Ad hoc reports for each quick start screen. Click on **Quick Start Favorite Reports** and then select the appropriate quick start screen from the dropdown list. Next, select a report from the Crystal Report or Ad-hoc Report dropdown list. Fill in a name for the report in the Label field. Regardless of the actual name of the report, the custom name that you type into the Label field will appear on the quick start screen. Repeat the procedure to add additional reports.

Section Nine: Where to Get Additional Help

Visit the Chemical Safety EMS help pages at **http://chemicalsafety.com/support/** where you can view knowledge base tutorials, training videos, and submit a trouble ticket if necessary.