

SDS Refresh Reporting

On behalf of subscribers to the SDS Refresh Service, SafeTec attempts to keep current all active (M)SDSs with the most up-to-date copy available from the manufacturer or supplier of that product. This process applies to each of those documents at a minimum of every 3 years. Additionally, we create general categories for the status of a document, we take notes on the effort at the record level, and allow the customer to interact with the process so they can provide additional data. This document will walk you through how to find and use the SafeTec SDS Refresh Reporting tool. This tool gives the user insight into, and documentation of, the retrieval process.

After reviewing this document and tool, please reach out to your account manager if you have specific unanswered questions, or if your organization does not currently subscribe to the SDS Refresh Service (formerly Monitor Service).

[SDS REFRESH REPORTING GLOSSARY](#)

[RETRIEVAL STATUS DEFINITIONS](#)

[EXCLUSION DEFINITIONS](#)

[SEARCH FOR SDS REFRESH RECORDS](#)

[RETRIEVAL INFORMATION WINDOW](#)

[VIEW STATISTICS WINDOW](#)

[OPTIONAL: SDS DETAIL – RETRIEVAL INFORMATION ON VERSIONS TAB](#)

SDS Refresh Reporting Glossary

The SDS Refresh Report tool organizes documents into four categories that represent the 12 potential statuses, or progress, of each document in the retrieval effort. These categories are defined in the table below.

Retrieval Status Definitions

Category	Status	Definition
Complete	Complete – Discontinued Product	Attempts were made to retrieve a new (M)SDS, but the manufacturer has indicated that the product has been discontinued and a newer version is unavailable
	Complete – Manufacturer Does Not Exist	Attempts were made to locate the manufacturer indicated on the original document, but no manufacturer could be found matching the name listed on the record.
	Complete – Most Current MSDS	Attempts were made to retrieve a new (M)SDS, but the available document version matches the original document and a newer version is not available or viewed as an acceptable replacement.
	Complete – Not a Reportable Product	Attempts were made to retrieve a (M)SDS for the specified product, but the manufacturer has indicated that a document is not required.
	Complete – New Version Acquired	The retrieval attempt resulted in successfully acquiring a new version of the original document.
In Progress	In Progress – In Retrieval Queue	The record is in an active retrieval effort and attempts will, or have been made to acquire a new document.
Suspended	Suspended – Authorization Letter Required	The manufacturer has requested an Authorization Letter before they will release requested documents. An Authorization Letter was not found on file or the customer did not supply one.
	Suspended – Customer Follow Up	Additional information about the specific product must be supplied before the document can be successfully retrieved (e.g. Product Number, Color, UPC, etc.).
	Suspended – Manufacturer Not Responding	Multiple attempts have been made to contact the manufacturer directly to request a document. The manufacturer either failed to respond or could not be reached by phone, email, or FAX.
	Suspended – Manufacturer Won't Release	The manufacturer has a policy to not release (M)SDSs to 3rd party vendors or that the customer we are requesting a document for has not purchased from them recently and is therefore not considered a current customer and, subsequently, they will not release the (M)SDS.
	Suspended – Requested Format Unavailable	The manufacturer does not have the (M)SDS in the format that we requested (e.g. unsupported language or document format)
None	None	No attempts have been made at this time to retrieve a newer revision of this document.

When deciding what documents in your active collection need to be refreshed, SafeTec will filter and exclude some documents from a new retrieval effort. These decisions are based on document attributes that indicate the retrieval effort would fail or is unnecessary, and some attributes may have been created from an earlier retrieval attempt. These exclusions are defined in the table below.

Exclusion Definitions

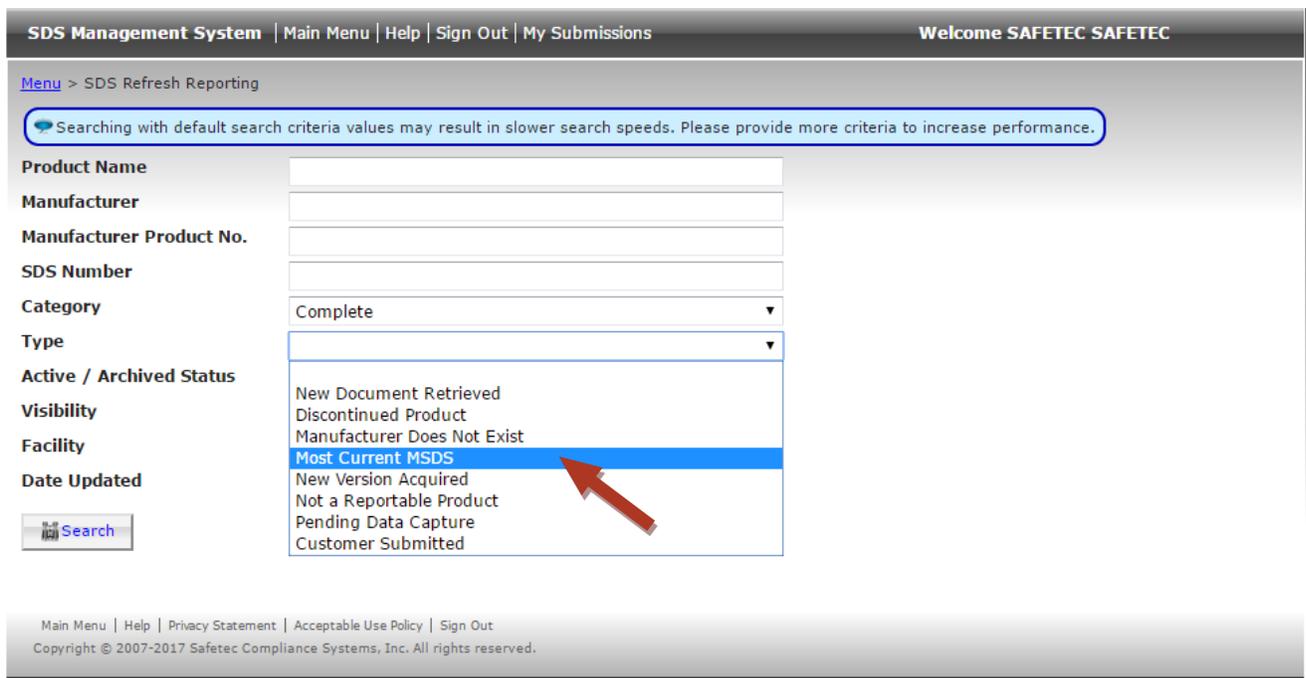
Exclusion	Definition
Document With Limited Visibility	Document was excluded from the SDS Refresh project if the document Visibility was set to Limited, often indicated it was still in an approval process or needed additional processing.
Manufacturer Flagged No 3rd Party Requests	Document was excluded from SDS Refresh project if the Manufacturer has indicated that they will not respond to 3rd party requests from vendors such as SafeTec. The list of Manufacturers that are flagged as such are vetted and reviewed periodically by SafeTec Operations staff.
Critical Document Attribute Exists	Document was excluded from SDS Refresh project if the document had one of the attributes captured listed in the table in the section titled 'Critical Document Attributes'.
Manufacturer Flagged Out of Business	Document was excluded from SDS Refresh project if the Manufacturer has been identified as being Out of Business. The list of Manufacturers that are flagged as such are vetted and reviewed periodically by SafeTec Operations staff.
Product Discontinued	Document was excluded from SDS Refresh project if the Manufacturer has indicated that the material or product is no longer being manufactured or distributed.

Search for SDS Refresh Records

1. From the main menu, click the **SDS Refresh Reporting** button.



2. The **SDS Refresh Reporting** tool will open to the search page. SafeTec recommends using the various search filters to reduce the time to load results. For example, using the **Category** dropdown to search for **Complete** documents, will show an additional field for **Type** (Status), and you can further refine your criteria. The default search will return all active and fully visible documents in your system, for all retrieval categories.



3. After you have selected your search criteria, click the **Search** button to see the results.



4. The search results grid will display the documents groups by the **Category** field, which can be sorted. Follow the PDF icon link or the Product Name link to view the document or the SDS Detail page, respectively.

SDS Refresh Report

Export to Excel View Statistics

Page 1 of 154

SDS	Product Name	Manufacturer	Date Updated	SDS Number	Active	Category Type	
	PHOSPHORIC ACID	Mallinckrodt Baker, Inc.		SDS-001461	<input checked="" type="checkbox"/>	None	Show Info
	Unknown Product Name	Unknown Manufacturer		SDS-001580	<input checked="" type="checkbox"/>	None	Show Info
	BORIC ACID	Mallinckrodt Baker, Inc.		SDS-001292	<input checked="" type="checkbox"/>	None	Show Info
	UNIGLOW F6HF Yellow F6HF	Sandy Brae Laboratories, Inc.		SDS-001802	<input checked="" type="checkbox"/>	None	Show Info
	Hafnium	Sigma-Aldrich Corp.		SDS-000719	<input checked="" type="checkbox"/>	None	Show Info
	2-BUTOXYETHANOL	Mallinckrodt Baker, Inc.		SDS-001712	<input checked="" type="checkbox"/>	None	Show Info
	Brush-on/Blue Block	Hercules Chemical Co., Inc.		SDS-001589	<input checked="" type="checkbox"/>	None	Show Info
	2-Hydroxyethyl methacrylate	Sigma-Aldrich Corp.		SDS-001917	<input checked="" type="checkbox"/>	None	Show Info
	ANTIFREEZE COOLANT	CSD (Chemical Specialists & Development) aka Startex Chemicals, Inc.		SDS-002114	<input checked="" type="checkbox"/>	None	Show Info
	3M Primer 94	3M (Minnesota Mining & Mfg.)		SDS-000591	<input checked="" type="checkbox"/>	None	Show Info

Page 1 of 154

1,533 records

5. Click the **Show Info** button on the right of records you want to review in more detail.

SDS Refresh Report

Export to Excel View Statistics

Page 1 of 154

SDS	Product Name	Manufacturer	Date Updated	SDS Number	Active	Category Type	
	PHOSPHORIC ACID	Mallinckrodt Baker, Inc.		SDS-001461	<input checked="" type="checkbox"/>	None	Show Info
	Unknown Product Name	Unknown Manufacturer		SDS-001580	<input checked="" type="checkbox"/>	None	Show Info
	BORIC ACID	Mallinckrodt Baker, Inc.		SDS-001292	<input checked="" type="checkbox"/>	None	Show Info
	UNIGLOW F6HF Yellow F6HF	Sandy Brae Laboratories, Inc.		SDS-001802	<input checked="" type="checkbox"/>	None	Show Info
	Hafnium	Sigma-Aldrich Corp.		SDS-000719	<input checked="" type="checkbox"/>	None	Show Info
	2-BUTOXYETHANOL	Mallinckrodt Baker, Inc.		SDS-001712	<input checked="" type="checkbox"/>	None	Show Info
	Brush-on/Blue Block	Hercules Chemical Co., Inc.		SDS-001589	<input checked="" type="checkbox"/>	None	Show Info
	2-Hydroxyethyl methacrylate	Sigma-Aldrich Corp.		SDS-001917	<input checked="" type="checkbox"/>	None	Show Info
	ANTIFREEZE COOLANT	CSD (Chemical Specialists & Development) aka Startex Chemicals, Inc.		SDS-002114	<input checked="" type="checkbox"/>	None	Show Info
	3M Primer 94	3M (Minnesota Mining & Mfg.)		SDS-000591	<input checked="" type="checkbox"/>	None	Show Info

Page 1 of 154

1,533 records

Retrieval Information Window

A **Retrieval Information** window will open when a user clicks the **Show Info** button. This window displays additional information on the retrieval record including: basic information, retrieval information, and retrieval notes. Users can take several actions within this window including create and save User Notes, Attach Documents to circumvent retrieval effort, and View SDS Detail for the current record. **Date Created** indicates when the retrieval effort for the document was created, and the **Date Updated** indicates when the last change was made by SafeTec.

1. To create **User Notes**, click inside the text box, type the notes you want stored with the record, and click the **Save** button. An important distinction - **User Notes** are created and saved by the customer, while the SafeTec team creates the **Notes** in the grid.

Retrieval Information ✕

Basic Information

Product Name	SODIUM BICARBONATE
Manufacturer	Church & Dwight Co., Inc.
Manufacturer Division	
Revision Date	1/20/2009
Product Number	
SDS Retrieval Status	Most Current MSDS

Retrieval Information

Date Created	2/22/2017
Date Updated	2/28/2017
Completed	Yes

Notes

Notes	Date Created
[2017] Original Database MSDS and Mfg. website MSDS are of same revision date and Non GHS format. So marked as "Complete: Most Current MSDS available".	2/28/2017
[2017] Vendor verified that this is the most current copy of the (M)SDS with the manufacturer	2/28/2017

User Notes

Attach Document

Attach Document

- To submit a new revision of the record, which is always faster than a retrieval if you have the document, click the Attach Document button, find the new PDF on your computer, and then click the **Save & Submit** button in the lower right corner of the window. This feature is useful if the retrieval effort is on going, but the customer already has received a new version from the manufacturer.

Retrieval Information x

Basic Information

Product Name	SODIUM BICARBONATE
Manufacturer	Church & Dwight Co., Inc.
Manufacturer Division	
Revision Date	1/20/2009
Product Number	
SDS Retrieval Status	Most Current MSDS

Retrieval Information

Date Created	2/22/2017
Date Updated	2/28/2017
Completed	Yes

Notes

Notes	Date Created
[2017] Original Database MSDS and Mfg. website MSDS are of same revision date and Non GHS format. So marked as "Complete: Most Current MSDS available".	2/28/2017
[2017] Vendor verified that this is the most current copy of the (M)SDS with the manufacturer	2/28/2017

User Notes

Attach Document

Attach Document

View SDS Detail
Save
Save & Submit
Close

- Click the **View SDS Detail** button if you wish to view the current SDS Detail for the record. Clicking this button will open the SDS Detail in a new tab, and you may have to allow pop-ups in your browser for this to occur.

4. Click the **X** in the upper right or **Close** button in the lower right corner to close the **Retrieval Information** window.

Retrieval Information ✕

Basic Information

Product Name	SODIUM BICARBONATE
Manufacturer	Church & Dwight Co., Inc.
Manufacturer Division	
Revision Date	1/20/2009
Product Number	
SDS Retrieval Status	Most Current MSDS

Retrieval Information

Date Created	2/22/2017
Date Updated	2/28/2017
Completed	Yes

Notes

Notes	Date Created
[2017] Original Database MSDS and Mfg. website MSDS are of same revision date and Non GHS format. So marked as "Complete: Most Current MSDS available".	2/28/2017
[2017] Vendor verified that this is the most current copy of the (M)SDS with the manufacturer	2/28/2017

User Notes

Attach Document

Attach Document

View SDS Detail Save Save & Submit Close

View Statistics Window

A different Retrieval Information window will open when a user clicks the  **View Statistics** button from the Search Results grid. This window will show high-level statistics for the results of your search, and are most useful if you have returned a search of all categories. In this window the categories, types, and counts for each are displayed in a grid, and these values are rolled up and displayed in a pie chart by category. Filtering your results by category will also filter these statistics.

Retrieval Information
✕

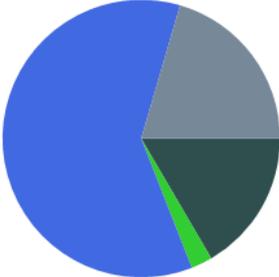
Retrieval Summary By Status Type

 [Export to Excel](#)

Category	Type	Count
Complete	Discontinued Product	6
Complete	Manufacturer Does Not Exist	1
Complete	Most Current MSDS	38
Complete	New Version Acquired	879
Complete	Not a Reportable Product	3
In Progress	In Retrieval Queue	254
None		314
Suspended	Customer Follow Up	22
Suspended	Manufacturer Won't Release	16

Retrieval Summary By Status Category

Total Documents: 1533



In Progress
 Suspended
 Complete
 None

Close

OPTIONAL: SDS Detail – Retrieval Information on Versions Tab

To further empower users, we also offer additional retrieval information on **SDS Detail** page, specifically on the **Version Information** tab. This tab already includes the Date Created field that indicates when the record was created in your collection, and the Date Update that indicates when the last change was made on the record (e.g. archiving, location, field edits, etc.). The Retrieval Metadata section refers specifically to the last or current retrieval effort, and matches the information supplied in the SDS Refresh Reporting tool. This section also includes any User Notes made in the SDS Refresh Reporting tool as well.

If you are interested in adding the Version tab to your SDS Detail page, or including the Retrieval Metadata section, please contact your account manager to discuss configuration options.

SDS Management System | [Main Menu](#) | [Help](#) | [Sign Out](#) | [My Submissions](#) Welcome SAFETEC SAFETEC

[Menu](#) > [SDS Search](#) > SDS Detail Basket (0)

View SDS
Save
Submit New Revision Of This SDS

Basic Information
Properties
Hazards
First Aid
PPE
Inventory
Relationships
SDS Labels
Version Information
GHS

SODIUM BICARBONATE - 1/20/2009 - Active

Date Created	<input type="text" value="11/14/2016"/>
Date Updated	<input type="text" value="2/28/2017"/>
Last Retrieval Date	<input type="text" value="2/28/2017"/>
Date Archived	<input type="text"/>

Retrieval Metadata

Status	<input type="text" value="Most Current MSDS"/>
Date Created	<input type="text" value="2/22/2017 1:28:45 PM"/>
Date Updated	<input type="text" value="2/28/2017 7:34:07 PM"/>
User Notes	<div style="border: 1px solid #ccc; height: 80px;"></div>

✔ [Go to SDS Refresh Report for this document](#)

[Main Menu](#) | [Help](#) | [Privacy Statement](#) | [Acceptable Use Policy](#) | [Sign Out](#)
 Copyright © 2007-2017 Safetec Compliance Systems, Inc. All rights reserved.