

Enter & Manage Inventory Data First Year

Inventory refers to the capture of material quantities present in the workplace. Typically, this information is then used for regulatory reporting purposes based on maximum quantity on-hand and the amount used for a given period. The Inventory Management toolset provides various tools that can be used to track inventory and build reports. In addition, inventory and material data can be leveraged to determine if reporting thresholds have been met or exceeded, for Tier II reporting.

The following sections describe how to build an inventory, manage inventory, and build reports. If any of the screen shots or directions in this document do not match your website, please contact customerservice@safetec.net.

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Standard Inventory

The Inventory module used primarily for Tier II reporting. It is important to maintain an accurate inventory to ensure reporting requirements are met appropriately. For example, making sure the inventory is entered into the correct reporting year, and the correct amount of inventory is captured.

Inventory Configuration

The first step in building an inventory is to set up the inventory capture period. This step is performed through the Facility Management feature located on the Main Menu. If this is not done correctly your data will end up in the incorrect year and your reports may not be accurate. It could also lead to a delay in entering your inventory data if/when SafeTec needs to clean up the bad data.

Configure Inventory Period for the First Time

To set up the inventory capture period, you must first ask yourself how often I intend to record Inventory data. SafeTec highly recommends for simplicity to only capture inventory once a year for Tier II reporting. This way you can enter your max-on hand values once for reporting. Other options are available.

1. From your Admin account, on the Main Menu, click **Facility Management**.



2. For the facility you wish to add inventory to, click the **Inventory Configuration** button.

Inventory Configuration	Facility Name	City	State	Contact Name	Active
	Chicago, IL	Chicago	IL		<input checked="" type="checkbox"/>
	Houston, TX				<input checked="" type="checkbox"/>
	Los Angeles, CA				<input checked="" type="checkbox"/>
	New York, NY				<input checked="" type="checkbox"/>

3. **Stop!** If you do not see a screen similar to this with a button saying **Start Current Inventory Period** at the bottom, you already have an Inventory Period configured. Do not complete the rest of this section. From here, you can either enter your inventory data (next section in this document) if the inventory period is set for time you want to capture inventory for. If the inventory period is set up for a time period behind the time period you wish to capture inventory for, contact customerservice@safetec.net for documentation on how to adjust the inventory period.

[Menu](#) > Inventory Configuration

 [Go Back](#)

Facility *


Inventory Cycle *


Year *


 [Start Current Inventory Period](#)


4. If you see a screen similar to the one below with the **Start Current Inventory Period** button available to you at the bottom, please continue with by doing the following:



[Menu](#) > Inventory Configuration

 [Go Back](#)

Facility * 


Inventory Cycle * 

Year * 

 [Start Current Inventory Period](#) 

- a. Select *Yearly* for your inventory Cycle.
 - i. SafeTec recommends a yearly inventory cycle for Tier II reporting so you only need to enter your max on-hand inventory once a year instead of monthly or other options. Changing this requires SafeTec to make adjustments, which can cause a delay in getting your report built.

- b. For the year, select the year you want to generate the report for.
 - c. Click **Start Current Inventory Period**.
5. You may be prompted if you are sure you want to start a new inventory period. Click **OK**.
 6. You should receive confirmation that your inventory period has been set.



Menu > [Facility Search](#) > Facility Management

The action successfully completed.

Details | Sub Locations | Contact Information | Company Information

Save | [Inventory Configuration](#)

New York, NY

Facility Name *	<input type="text" value="New York, NY"/>	X
Active / Archived Status *	<input type="text" value="Active"/>	▼
Facility Division	<input type="text"/>	

7. Enter the data on the Details tab found in the window shown in Step 6.

Once the inventory period is set up for your location, you can start entering in inventory data for that facility.

Enter Inventory Data

The Inventory Tab on the SDS Detail page displays inventory data related to that SDS. This is used for max on hand inventory data for Tier II reporting.

The Inventory Tab is divided into two sections. The top section allows users to filter the inventory records for the current SDS, or search for previous inventory periods. The bottom section lists all inventory records for the current inventory period, and also allows Administrative Users to enter new inventory records.

Once an inventory period has been created, do the following steps to add an SDS to an inventory:

1. From the Main Menu, click the **SDS Search** button to search for chemical that needs inventory data.



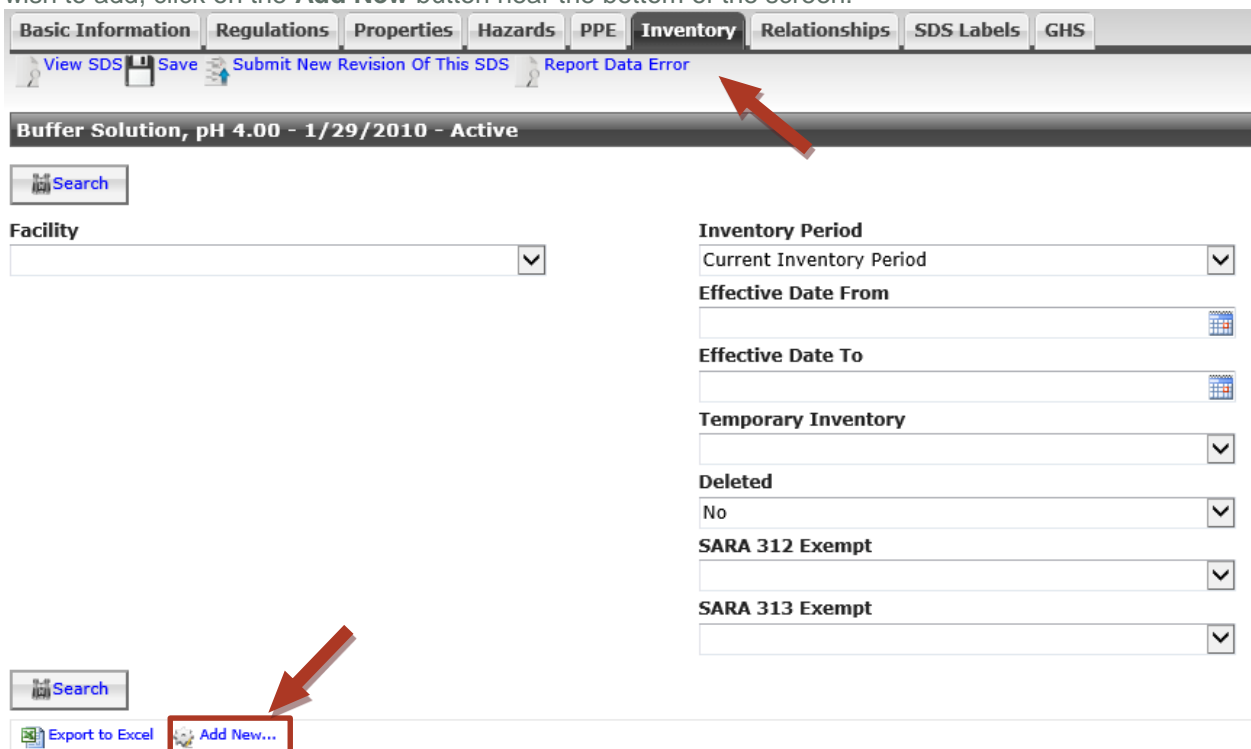
2. On the **SDS Search** page, conduct a search for a chemical you wish to add inventory to and click the **Search** button.



- a. Optional Search: Select the facility that you wish to add inventory for.
- b. Optional Search: Use the [Regulation Search](#) drop down and select *USA SARA Sec 302 Extremely Hazardous Sub.*

3. On the Search results, click the blue link to open chemical you wish to add inventory.

4. At the top of the SDS Detail page, click the **Inventory Tab**. It shows you all the inventory at the bottom of the screen that matches the search criteria at the top of the screen. If you do not see the inventory you wish to add, click on the **Add New** button near the bottom of the screen.



Basic Information Regulations Properties Hazards PPE **Inventory** Relationships SDS Labels GHS

[View SDS](#) [Save](#) [Submit New Revision Of This SDS](#) [Report Data Error](#)

Buffer Solution, pH 4.00 - 1/29/2010 - Active

[Search](#)

Facility

Inventory Period

Current Inventory Period

Effective Date From

Effective Date To

Temporary Inventory

Deleted

No

SARA 312 Exempt

SARA 313 Exempt

[Search](#) [Export to Excel](#) [Add New...](#)

No records were found.


5. Select the facility the product is located. Indicating sub locations is optional. Once you make a selection, the Inventory Configuration section of the screen will update.


Menu > [SDS Search](#) > [SDS Detail](#) > Inventory Detail Related Links
[Inventory Search](#)

Save Calculate Quantity Inventory History Go Back

Details Version Information

Buffer Solution, pH 4.00

Facility * 


Inventory Capture Type Standard Inventory 

Inventory Configuration

Inventory Cycle

Period Start Date

Period End Date




6. There are two methods of entering inventory. The lower portion of the screen will update depending on your selection.


Menu > [SDS Search](#) > [SDS Detail](#) > Inventory Detail Related Links
[Inventory Search](#)

Save Calculate Quantity Inventory History Go Back

Details Version Information

Buffer Solution, pH 4.00

Facility * Facility A 


Inventory Capture Type Standard Inventory 

Inventory Configuration

Inventory Cycle Quarterly

Period Start Date 4/1/2013

Period End Date 6/30/2013





- a. The default selection is *Standard Inventory*. When this method is selected, you can enter the total bulk inventory quantity of a chemical you have into the system.
- b. The second method is to enter inventory using *Container Count Inventory*. This method is used for capturing quantities based on the number of individual containers present.

7. Regardless of which method you choose, enter the **Unit of Measure** and the **Contain Type** of the product.

Standard Inventory

Prior Period Ending On Hand Quantity

Unit of Measure 

Container Type 

Max Quantity On Hand

Max Quantity On Hand Pound(s)

Average Quantity

Average Quantity Pound(s)

Days On Site Override

8. Enter either the **Max Quantity on Hand** and/or **Average Quantity**.

Standard Inventory

Prior Period Ending On Hand Quantity

Unit of Measure 

Container Type 

Max Quantity On Hand Quart(s) 

Max Quantity On Hand Pound(s)

Average Quantity Quart(s) 

Average Quantity Pound(s)

Days On Site Override

9. After entering your inventory, at the top of the screen, click **Calculate Quantity**.



10. The screen will refresh with **Max Quantity on Hand** and **Average Quantity**.

Standard Inventory			
Prior Period Ending On Hand Quantity	<input type="text"/>		
Unit of Measure	Quart(s) <input type="button" value="v"/>		
Container Type	Plastic bottle(s) or jug(s) <input type="button" value="v"/>		
Max Quantity On Hand	<input type="text" value="10"/>	Quart(s)	
			Max Quantity On Hand
			<input type="text" value="20.9626"/>
			Pound(s)
Average Quantity	<input type="text" value="3"/>	Quart(s)	
			Average Quantity
			<input type="text" value="6.2888"/>
			Pound(s)
Days On Site Override	<input type="text"/>		

- a. Note: If you do not like this values, make adjustments and click the **Calculate Quantity** button again until you are satisfied with the value.

11. Click the **Save** button at the top of the page to add the inventory to the SDS.



12. The page will refresh to let you know the inventory has been added to the record. Repeat these steps for all chemicals that are reportable.

[Menu](#) > [SDS Search](#) > [SDS Detail](#) > Inventory Detail

The record was successfully added.

 Save
  Calculate Quantity
  Delete
  Inventory History
  Go Back

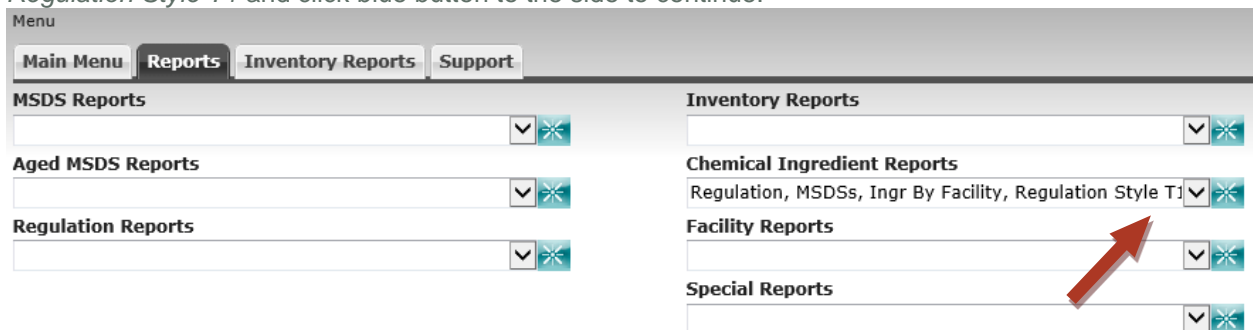
Determine What Products Are Reportable

One method to find a list of reportable products and their reportable chemicals is to use a report in the SafeTec system. Here are the steps to generate that report:

1. From the main menu, click on the **Reports** tab at the top of the screen.



2. In the **Chemical Ingredient Reports** drop down menu, select *Regulation, MSDSs, Ingr By Facility, Regulation Style T1* and click blue button to the side to continue.



3. Make the following selections:

[Menu](#) > Grid Report Center > Regulation, MSDSs, Ingr By Facility, Regulation Style T1

 [Go Back](#)

 [Run Report](#)

Facilities

 [Export to Excel](#) [Check All](#) [Uncheck All](#)

Add	Facility
<input checked="" type="checkbox"/> 	Chicago, IL
<input type="checkbox"/>	Houston, TX
<input type="checkbox"/>	Los Angeles, CA
<input type="checkbox"/>	New York, NY
<input type="checkbox"/>	Philadelphia, PA
<input type="checkbox"/>	Portland, OR




Filter By Regulation * 


 [Run Report](#) 


- Select your facility.
- In the **Filter By Regulation** drop down, select *USA SARA Sec 302 Extremely Hazardous Sub*.
- Click **Run Report**.

4. The results of the report is a list of all products and their ingredients associated to the select facility and have at least one ingredient on the USA Superfund Amendments and Reauthorization Act (SARA) Section 302 Extremely Hazardous Substance list. The ingredients of the product that is flagged by this regulation will have the **CAS Regulated** check box marked.


[Menu](#) > Grid Report Center > Regulation, MSDSs, Ingr By Facility, Regulation Style T1

 [Go Back](#)

 [Rerun Report](#)

 [Export to Excel](#)

Facility	Product Name	MSDS Number	Manufacturer	Revision Date	CAS Regulated	Chemical Name	CAS Number	% Context	Min %	Max %	% Range
Chicago, IL	16% Formaldehyde	MSDS-000651	Electron Microscopy Sciences	09/02/2011	<input checked="" type="checkbox"/>	Formaldehyde	50-00-0	n/a	16.00 %	16.00 %	16%
Chicago, IL	Alex Plus Acrylic Latex Caulk Plus Silicone - All Colors	MSDS-000609	RPM International	05/23/2008	<input type="checkbox"/>	Acrylic Polymer		Greater Than (Min)	3.00 %	100.00 %	Greater Than 3%
Chicago, IL	Alex Plus Acrylic Latex Caulk Plus Silicone - All Colors	MSDS-000609	RPM International	05/23/2008	<input checked="" type="checkbox"/>	Ammonia	7664-41-7	Less Than (Max)	0.00 %	0.08 %	< 0.08%



Second and Additional Years Inventory Management

After your inventory has been completed for the first year, it is much easier to process for the second year. Please review [Enter and Manage Inventory Data Second and Additional Years](#) documentation. This document will walk you through how to roll your inventory period forward while maintaining your inventory, and how to make quick adjustments of that inventory for your new cycle.