Enter & Manage Inventory Data Second and Additional Years

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 of this document describe how to reconfigure your inventory for additional years after you have completed your first year. If inventory has never been configured or entered for your facility, you will need to review Enter & Manage Inventory Data First Year documentation.

If inventory has been configured and entered for your facility for a previous inventory cycle, and if any of the screen shots or directions in this document do not match your website, please contact customerservice@safetec.net.

Roll Inventory Period Forward

After your inventory has been completed for the first year, it is much easier to process for the second year.

WARNING: SafeTec cannot easily roll back an inventory period once it is configured. Please make sure that inventory for the previous period is captured and complete before moving the period forward.

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

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		✓
	Houston, TX				✓
	Los Angeles, CA				✓
	New York, NY				✓

3. **Stop!** If you see a window instead similar to the one below with only the **Start Current Inventory Period** button available to you at the bottom, your facility has never been configured for inventory and you cannot complete this document. Please see Enter & Manage Inventory Data First Year documentation.

Menu > Inventory Configuration

Go Back

Facility *	New York, NY
Inventory Cycle *	
Year *	2014

Start Current Inventory Period

4. If you already have an inventory period configured, you should see a screen similar to this. If you have three buttons, we will focus on the first two since they are the ones that deal with the inventory period.
WARNING: SafeTec cannot easily roll back an inventory period once it is configured. Please make sure that inventory for the previous period is captured and complete before moving the period forward.

Menu > Inventory Configuration

Basic Information

Facility Management   Go Back

Facility Name	New York, NY
Inventory Cycle	Yearly
Period Start Date	1/1/2014
Period End Date	12/31/2014

Start Next Inventory Period And Copy Inventory From Previous Period

Start Next Inventory Period

Copy Inventory From Previous Period

a. **Start Next Inventory Period and Copy Inventory From Previous Period** will roll the period to the next cycle and make a copy of all the inventory for that location.
   i. Note: This button is the recommended method by SafeTec and allows you to use the Inventory Quick Entry to adjust your previous inventory to your new cycle.
b. **Start Next Inventory Period** is simpler in that it only rolls over the period without any data from the previous year. While SafeTec has made this option available to you for use, it is not the button SafeTec recommends using.

c. **Copy Inventory From Previous Period: DO NOT USE** this button without consulting with SafeTec first.

d. Not pictured: **Start Inventory Period and Copy Inventory With Quantities from Previous Period** (sometimes renamed to **Start Next Inventory Period**) will roll the period to the next cycle and make a copy of all the inventory with quanities for that location.

      i. Note: This button is the recommended method by SafeTec and allows you to use the Inventory Quick Entry to adjust your previous inventory to your new cycle.

      ii. If you do not have this button and wish to use it, please contact customerservice@safetec.net.

Your inventory period should now be rolled over.

Inventory Quick Entry

You can still enter inventory data the same way you did for your first year of inventory, but SafeTec has a tool called Inventory Quick Entry that will bring up a list of the previous inventory and quantity and allow you to update it with this period's quantity. It does not assist in adding new chemicals to your inventory. The Inventory Quick Entry function only works if:

1. You have a previous inventory cycle with inventory associated to that time frame, and
2. When you rolled over your inventory cycle, you also copied the inventory from the previous period using the **Start Next Inventory Period and Copy Inventory From Previous Period**.

To use the Inventory Quick Entry:

1. From your Admin account, on the Main Menu, click **Inventory Quick Entry**

    Inventory Quick Entry

2. Select a facility you want to make adjustments on inventory from cycle to cycle. Choosing a sub location is optional. Click the **Search** button.

Facility	⌄
Sub Location 1	
Sub Location 2	

Search

3. The results show last cycle's inventory.

Update Inventory via Quick Entry

1. You can add and modify this inventory to the current cycle by entering data for that chemical.

   a. Enter the Usage Quantity, the Max Quanity on Hand, and the Average Quantity.
   b. If you wish to see the previous inventory cycle's inventory, hover your mouse over the blue I for that chemical.

2. Clicking the **Save** button at the top of the screen to commit your inventory.

3. If the value is not to your liking, you can modify it and click **Save** again.

Filter Inventory for Quick Entry

If you have a lot of chemicals to update the inventory on, you can use the filter at the top of the screen to limit what you see for chemicals in the lower portion of the screen.

Inventory Quantity Status
Use the radio buttons to hide or select inventory records depending on whether quanties have been entered or not.

Examples:
- Setting all Inventory Quantity Status radio buttons to **Captured** and then clicking the **Apply Filters** button will show you all records that have inventory configured for this cycle. This is useful for reviewing your inventory and making quick adjustments.
- Setting all Inventory Quantity Status radio buttons to **Not Captured** and then clicking the **Apply Filters** button will show you all records that do not have inventory configured for this cycle. This is useful for finding chemicals that are still in need of their inventory updated for this cycle.
- Setting all Inventory Quantity Status radio buttons to **Show All** and then clicking the **Apply Filters** button will show you all records regardless of inventory.

Inventory Capture Type
Use the radio buttons in this section to show or hide inventory records based on inventory capture type. **Standard Inventory** is typically used for bulk inventory quantities, whereas **Container Count Inventory** is used for capturing quantities based on the number of individual containers present. The **Show All** displays all chemicals regardless of inventory entry type.

Click the **Apply Filters** button to refresh according to your choice.

Adding New Inventory
If you have a chemical that did not inventory in the previous cycle, you will have to add the inventory via the SDS Details page. Please review Enter & Manage Inventory Data First Year documentation for more information.