Importing Inventory into Chemicals

Note: Sublocations are required to import. Confirm that sublocations are associated with your inventory before continuing.

1. From the Chemicals homepage, select **Inventory Summary**
2. In the "Import & Reconcile" section, select **Import**
3. Download the Import template from the page by selecting the **Download Template** button

Formatting the Template

Open the import spreadsheet template on your computer. The following fields are required for a successful import. Leaving any required fields blank will result in an error.

- **Column B: CAS** Number
  - o RSS Chemicals matches primarily on CAS number, so any item without a CAS number will automatically display an error
- **Column C: Name**
  - o Chemical name
- **Column D: Building**
  - o We recommend copying and pasting building names exactly as they appear on the Import page under "Locations"
- **Column E: Room**
  - o We recommend copying and pasting room names exactly as they appear on the Import page under "Locations"
- **Column F: Sublocation Name**
  - o We recommend copying and pasting sublocation names exactly as they appear on the Import page under "Locations"
- **Column G: Size**
  - o Use whole numbers
- **Column H: Unit**
  - o Only use options in dropdown for Column H
- **Column J: Number of Containers**
  - o Use whole numbers
- **Column K: Container Type**
  - o Only use options in dropdown for Column K

- **Column L: Physical State**
  - Only use options in dropdown for Column L

- The other columns are not required. The data can also be added manually after the import by searching for an individual chemical in **Search Chemicals**, selecting the three-dot menu to the right of the container, and choosing **Edit**

Uploading the template

1. In the Import & Reconcile section, select Import
2. Select **Upload File** and choose your completed spreadsheet
   a. **Note**: double-check that your Building, Room, and Sublocation columns are exactly as shown in the Import page under "Locations". Any misspelling or extra spaces will cause an error.
3. The **Exact Matches** screen shows which chemicals match to exactly one chemical in the RSS master chemical library
   a. Check the box(s) next to chemical name and choose **Save Selected**
   b. Or select the top checkbox and select **Save Selected** to save all listed items
   c. *Note: Chemicals will remember your upload status. You can logout and return at any time to continue reviewing imported chemicals*
4. Scroll to view **Multi Matches**
5. The **Multi Matches** screen shows chemicals that match to more than one chemical in the RSS master chemical library. This means there may be different grades or products from a commercial vendor to choose from
   a. Use the **drop-down** menu over the chemical name to select a specific product or grade
6. Check the box next to the chemical name and hit **Save Selected** to add it to your inventory.
7. Scroll to view **Issues**

Correcting Issues

Note: Correcting issues should be the last step you take in your import process. You will use an error report template to work on only the problematic imports. Using this spreadsheet will ensure that items aren't imported twice.

1. The **Issues** page displays any chemicals that were not recognized as well as incorrect data in the template
2. Select **Download Issues** to generate the error report (as an Excel file)
3. **Column R** displays the reason for the error

      a. Common error issues include a typo in Building or Sublocation, missing sublocations, and missing CAS numbers

4. Correct any errors, save the error report, and select **Upload File**. Upload the error report Excel file only

5. Follow the same process as above by reviewing upload information in the **Exact Matches** and **Multi Matches** pages

6. When all issues and matches are complete, you will be automatically returned to the Import page