

# Getting started with Chemicals

## 1. Creating a Group

A group is required to use Chemicals. If you already have a group, continue Step 2.

To create a group, go to <https://app.riskandsafety.com>

1. Select your initials located on the top right corner. Select “Profile”
2. Beneath “Group Memberships”, select **Create Group**
3. Enter the name of your new group
4. Select **Create**

## 2. Adding People and Locations to Your Group

1. Adding people
  - a. On the Members tab within the group, select the blue “+” button
  - b. Select the role using the checkboxes for the role and access to the inventory
  - c. Enter the name of the person and select **Save**
2. Adding locations
  - a. On the Locations tab within the group, select the blue “+” button
  - b. Enter the building and select the room
  - c. Select the checkbox next to the associated inventory
  - d. Select **Save**

## 3. Creating a New Inventory

1. From the Chemicals homepage, select **Create a new Inventory**
2. Select the box next to the name of your group
3. Select the owner of the inventory
4. Enter the name of the new inventory
5. Select **Save**

## 4. Adding Inventory Managers

1. Select your initials located on the top right corner. Select “Profile”
2. Beneath “Group Memberships”, select the group that is associated with the inventory where you wish to add an Inventory Manager

3. Select “Members” in the right-hand menu
4. Select the user’s name you wish to promote to Inventory Manager
5. Beneath “Document and Inventory Access”, select the box next to Inventory Manager
6. Select Save

## 5. Adding Sublocations

Sublocations are required before any containers can be added in.

### Adding a sublocation

1. Select Manage Sublocations from the Inventory Summary page
2. Select the blue “+” button in the lower right corner
3. Select the Room Number
4. Enter a Sublocation Name
5. A barcode can be entered in manually or scanned later with your mobile device. (For instructions, see next section: “Barcoding Sublocations”. This step is not required when using RFID barcodes
6. Temperature and Pressure default to Ambient and can be edited as needed
7. Mark the sublocation as private to prevent sharing of all containers stored within that sublocation
8. Select the appropriate hazard pictograms associated with the chemicals stored in the sublocation
9. Select Save

### Editing a sublocation

1. Select the vertical three-dot menu to the right of the sublocation
2. Select Edit
3. Edit information as needed
4. Select the Save button

### Removing a sublocation

1. Select the vertical three-dot menu to the right of the sublocation you wish to remove
2. Select Remove

**Note:** Before a sublocation can be deleted, the PI or Inventory Manager will be prompted to move the associated containers to a different sublocation

## 6. Adding Chemicals

### To Add Chemicals

1. From the Chemicals homepage, select **Add to Inventory**
2. Search the database by chemical name, CAS number, or product ID, then select a chemical family from the results
  - a. If you are unable to find the chemical you are searching for, select the three-dot menu in the upper right corner, and select **Add Commercial Substance**. This will allow you to add a chemical not found in our system that is purchasable from a vendor and make it searchable in the future.
  - b. If the chemical you are looking for is proprietary, synthesized, or no longer commercially available, select **Add Novel Compound** to enter it. This does not add the chemical to the chemical database.
3. To the right of containers, select the round + button
4. The required fields are as follows: Number of Containers, Container Size, Units, Physical State, Container Type, and Location. The other fields are optional and can be skipped
  - a. If using RSS barcodes, type the barcode manually or switch to the mobile to scan it
5. When complete, choose **Save**

## 7. 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: Product Number

- Product number is not required but is a new addition that can vastly improve the accuracy of your import template. Input the Product or Stock number of your container to improve accuracy of matching what is entered to the RSS Master

Chemical Library. For example, when inputting a product number, Chemicals will match on the product number rather than the CAS number, yielding more accurate match results.

- **Column C: CAS Number**

- RSS Chemicals matches primarily on CAS number, so any item without a CAS number will automatically display an error. Please note that only a single CAS number can be entered. If your chemical has multiple CAS numbers or is a mixture, please add via “Add to Inventory” on the homepage

- **Column D: Name**

- Chemical name

- **Column E: Building**

- We recommend copying and pasting building names exactly as they appear on the Import page under “Locations”

- **Column F: Room**

- We recommend copying and pasting room names exactly as they appear on the Import page under “Locations”

- **Column G: Sublocation Name**

- We recommend copying and pasting sublocation names exactly as they appear on the Import page under “Locations”

- **Column H: Size**

- Use whole numbers

- **Column I: Unit**

- Only use options in dropdown for Column H

- **Column K: Number of Containers**

- Use whole numbers

- **Column L: Container Type**

- Only use options in dropdown for Column K

- **Column M: 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