# Inventory Summary Guide
# (For PIs and Inventory Managers)

The Inventory Summary section allows PIs and Inventory Managers to perform administrative functions to their inventory and can be accessed only on the desktop version.

## Inventory Overview

- Provides a count of Total Chemicals and Total Containers in your lab
- View container issues
- Count of containers currently barcoded
- Count of containers missing barcodes

## Inventory Access & Permissions

- View and modify inventory member's permissions to access different functionalities within your chemical inventory
- Pull multiple groups into the inventory
- Add and remove Colleagues
    - Colleagues are inventories you share chemicals with
    - Select the pencil icon and search for the name of the inventory owner or the name of the inventory
    - The Colleague inventory will need to accept your request. After they do, you will be able to view their containers and easily check out and share containers to them

## Certification

- Certify your inventory as accurate

## Import & Reconcile

- Reconcile your inventory with RFID barcodes
- Reconcile your inventory by sublocation with QR barcodes
- Import containers in bulk
- Export inventory into a spreadsheet

## Tags

- Add or remove tags for your lab. Type a tag name and press “Enter” on your keyboard to add

## 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 round + 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

## Missing Rooms

- View rooms that are not associated with the inventory but have containers added to them

## View Activity

- Review the most recent 100 actions taken in the inventory
- If a container was accidentally deleted, it can be restored here

## Door Hazard Signs

- Hazard signs are automatically generated for the rooms in your inventory
- Review, edit and print hazard signs

## Barcoding Sublocations (For PIs and Inventory Managers–Mobile only)

Barcoding sublocations is required for the QR reconciliation process. QR Reconciliation relies on scanning the sublocation barcode followed by scanning all containers at this sublocation to audit your physical containers versus what's in the virtual inventory. When using QR barcodes, it is recommended to barcode all sublocations during initial set-up of the lab. Use the same barcode labels that are used for barcoding containers. This is not required when using RFID barcodes.

1. Place a barcode on your sublocation
2. Launch the app on your mobile device
    a. Select the **More** icon in the lower right corner
    b. Select "Barcode your sublocations"
    c. Select the scan icon on the sublocation you wish to barcode
    d. This will enable the camera feature on your mobile device
    e. Scan the barcode

## 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**

## Creating a Custom Chemical Name (For PIs and Inventory Managers–Desktop only)

1. Select **Search Chemicals** from the home page
2. Choose the chemical
3. Select the three-dot menu in the top right corner
4. Select **Custom Chemical Name**
5. Choose from synonyms list or type a name into the **Create custom name line**
6. Select **Save**

## Reconciliation (For PIs and Inventory Managers–Desktop only)

Reconciliation is the process of auditing your physical inventory to ensure it matches your online inventory in RSS Chemicals. This process typically happens once per year, though your organization may require it on a different basis. Reconciliation requires the use of barcodes (purchasable from RSS) and a separate scanner (purchasable from a scanner manufacturer). For detailed steps, please see our Reconciliation guide.