Chemical Standard Operating Procedures (SOPs) Templates

Getting Started

1. Log in at https://app.riskandsafety.com
2. From the RSS home page, select **Apps** in the top menu, then select **Chemicals**
3. On the Chemicals home page, choose **Inventory SOPs**

Creating a New SOP Template

The SOP template manager lets you create the predefined questions and fields that people see when they start a new SOP.

1. From the Inventory SOP home page, select the round three-dot menu in the lower right
2. Select **Manage Templates**
3. Select the round three-dot menu and choose **Create New Template**
4. Give the template a name and select **Save**. The template name will be viewable to people when they start a new SOP

Setting up the Template Sections & Cards

1. Begin building the template by adding and configuring sections. (The first section is added by default)
2. For a new section, select the + icon in the lower left that reads “Add New Section” when you hover over it.
3. Add cards to the section
    a. Within a section, select the + button (NOT Add New Section) in the lower left corner. You can add the following cards to the section:
        i. Biosafety Card – Allows a specific BUA to be searched for and added
        ii. Attendance Card – Allows attendees to be added
        iii. Checkbox Card – Pre-defined checklists that people must answer
        iv. Chemical Card – Allows individual chemicals to be searched and added
        v. Chemical Band Card – Allows chemical bands to be searched and added
        vi. Department Card – Allows the SOP to be associated with a department
        vii. Equipment Card – Allows equipment to be added to the SOP
        viii. Inspect Card – Allows an inspection checklist to be added to the SOP

ix. Inventory Card – Allows an inventory to be added to the SOP
x. Location Card – Allows a location to be added to the SOP
xi. Question Card – Allows free-form questions to be asked
xii. Reference Card – Allows another SOP to be searched and added as reference
xiii. Table Card – Allows a table to be added requesting specific types of data like names or dates
xiv. Text Card – Allows you to add instructions, statutes, or other information (**Hint**: This is ideal for having mandatory statements on all SOPs, especially when configured to not allow editing of this card. See step 4 "Configure the cards")

4. Configure the cards
    a. Each card added can be configured by selecting the gear icon in the right corner of the card.
        i. **Is required** – Makes answering that card a requirement
        ii. **Is editable** – Let's people make changes to that card
        iii. **Allow attachments** – Let's people add attachments to that card
5. Configure the sections
    a. Each section can also be configured by selecting the gear icon to the right of a section
    b. Give the section a title in "Section Header"
    c. Choose "Yes" or "No" if you want users of this template to be able to move cards that appear within this section
    d. You can allow people filling out an SOP to add their own cards. Select or deselect which cards you want to make available in that section. (**Hint**: Each section you create will likely be specific to only certain information, so select the cards that are appropriate for that information.)

Template Settings including Acknowledgements

The entire template has its own settings which should be reviewed before publication.

1. While editing a template, select the round three-dot button in the lower right corner
2. Select **Template Settings**
    a. **Prevent Clone** – Removes the ability to clone an SOP created from this template
    b. **Prevent Edit Title** – Prevents people from changing the title when they use this template for their SOP
    c. **Prevent Remove** – Removes the ability to delete a "Draft" SOP or archive a "Ready for Use" SOP if created using this template

   d. **Prevent Share** – Removes the ability to share SOPs created with this template
   e. **Show Acknowledgement** – Allows groups and individuals to be added to the SOP. **Note**: When the SOP is published, the individuals added will receive a notification that they must view and acknowledge the SOP.
   f. **Days until documents expire** – Sets an amount of days until an SOP created with this template will expire.
3. Select **Save**

Publishing the Template

When you have added and configured all sections and cards, and configured the template itself, you are ready to publish. **Note**: Once you have published, you cannot edit this template. (See Cloning a Template)

1. Select the round three-dot menu in the lower right corner
2. Choose **Publish**

Cloning a Template

If you need to make changes to a published template or want to create a template with similar attributes, use the clone feature.

1. Select a published template
2. Select the round three-dot menu in the lower right corner
3. Choose **Clone Template**
4. Rename the template, make your changes, and publish.
   a. You can archive the original template you cloned if you don't want to use it.
   b. Select the original template, then the round three-dot menu
   c. Choose **Archive Template**