



SDS Management System

Data Sheet Solutions Administrative Guide

CONTENTS

Introduction	4
Chemical Inventory Life-Cycle.....	4
Pending	4
In Process E	5
Active Library	6
Archive	6
Layout.....	7
Selection checkbox	7
Product Identifier	8
Manufacturer	8
Signal Word	9
Pictograms	9
Locations	10
SDS Download / Upload	11
Actions	12
Filtering & Search.....	13
Filter by click	13
Keyword Searching	13
Bulk Actions.....	14
Edit Locations	15
Create Book.....	15
Download ZIP	16
Email Zip.....	16
Send To.....	17
Request SDS	17
Adding New Chemicals	18
Manual Entry.....	18

Upload SDS Files.....	19
Admin Inventory	20
Edit Locations.....	23
Adding a New Location	24
Editing Locations.....	25
Deleting Locations.....	25
Tools.....	25
Reports.....	26
Logs	27
Statistics	28
User Administration.....	29
Groups.....	30
Super Administrator.....	33
Global Configuration.....	33
User Profile	35
Email Notifications.....	35
Edit Profile.....	35
Label Maker	36
Layouts.....	36
Templates.....	36
Adding a label.....	37
Printing Your Labels	37
Processing SDS Documents.....	37
Processing Wizard.....	38
Expert Mode	39

INTRODUCTION

This guide intends to provide details about the administrative functions available within your Data Sheet Solutions Administrative Dashboard. Depending on when this guide was printed, we may have increased functionality or modified behaviors slightly.

Plan Specific Notes

We do offer two flavors of the Data Sheet Solutions SDS Management System. Features specific to the plan will be identified as shown below.

E This “E” will indicate a feature available to customers with the **Enterprise** plan.

T This “T” will indicate a feature available to customers with the toolbox plan.

If you ever have a questions, be sure to get in contact with us at info@datasheetsolutions.com or on our website <https://www.datasheetsolutions.com>.


CHEMICAL INVENTORY LIFE-CYCLE

Your chemical inventory will progress through a series of stages we call the chemical inventory life-cycle. Each stage of the life cycle is represented by a different table within the administrative dashboard which can be navigated between using the stage selection bar at the top of the dashboard.



The number beside each label indicates the number of records within each stage.

PENDING

The “pending chemicals” stage will include chemicals that have been entered into the system, but not yet assigned to an SDS or sent to the Data Sheet Solutions Fulfillment team. Chemical requests rejected by the fulfillment team will also appear here, with a special indicator  which will provide you information on why the fulfillment team was unable to process your request.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Accelco sae15w-30 ci-4 ▲ No SDS Available	GM corp			Stores		
<input type="checkbox"/>	OFFICE SURFACE WIPES DOSDT ▲ No SDS Available	Falcon Safety Products			Building #200		
<input type="checkbox"/>	Federated lead acid batteries ▲ No SDS Available	Federated			Building #400 Stores		

The following actions are conditionally available for requests within this stage:

- Request SDS (Send to the Data Sheet Solutions Fulfillment Team) **E**
- Search SDS (Open multiple google searches to locate SDS) **I**
- Edit Request (Update the chemical information or process the uploaded PDF)
- Delete the Request

Rejected Requests **E**

When the fulfillment team rejects a request, it will typically be for one of the following reasons.

- **No SDS Available**
- **Need More Specific Information**
- **Does Not Require SDS**

When the fulfillment team requires more specific information, be sure to use the **Edit Request** button and add relevant product numbers to the request. When complete, be sure to send the request back to the fulfillment team with the **Request SDS** button.

IN PROCESS **E**

Chemical requests in the “In Process” life-cycle stage have been sent to the Data Sheet Solutions fulfillment team. Chemicals will remain in this stage until the fulfillment team either obtains and processes your request into the active library, or rejects the request back into the “Pending Chemicals” list.


About the Fulfillment Process

Our fulfillment team takes a methodical approach to the research and location of chemical safety data sheets which can be broken into several phases.

1. Manufacturer / Supplier Identification
2. Manufacturer / Supplier Electronic Library Search (if available)
3. Manufacturer / Supplier Direct Request (Electronic)
4. Request 1 Waiting Period
5. Manufacturer / Supplier Direct Request (Voice)
6. Request Resolution


The length of time your requests will remain in the “In Process” life-cycle stage will depend on how many phases of the fulfillment process are required to complete the fulfillment.

ACTIVE LIBRARY

Chemicals in your “Active” library are available for employees to browse and search in the employee portal. The fulfillment team will also periodically review your active chemicals to insure they are still current, and update if available. 

The following actions are available for chemicals in your active library:

 Send to Pending

 Send to Archive


 Delete

ARCHIVE

OSHA has identified safety data sheets as an acceptable exposure record (OSHA standard 29 CFR 1910.1020), which means you can meet your record retention requirements by saving all SDS's for the required 30 years. The “Archive” stage of our chemical life-cycle allows you pull a Safety Data Sheet from the workplace inventory and maintain a copy as long as needed.

Chemicals in the Archive are no longer available to employees browsing or searching the employee portal.

The following actions are available for chemicals in the “Archive” stage:

 Send to Pending

 Send to Active Library

 Delete














LAYOUT

The display of your chemical information is standard across all stages of the chemical life-cycle. Information is displayed in a table with specific data or actions shown in each column.

SELECTION CHECKBOX

The first column of each table includes the selection checkbox, which allows you to choose one or more chemicals in preparation for taking a bulk “With Selected” which includes location editing, book creation, zip file creation, chemical emailing.

The top-most checkbox which appears in the table header allows you to select or de-select all chemicals in the list at one time.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		   
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger	   	Janitorial		   
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger	   	Warehouse Janitorial		   
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		   

PRODUCT IDENTIFIER

The column titled “Chemical” includes the official product identifier for each entry. The product Identifier is one of three columns included in a basic keyword search.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

MANUFACTURER

The Manufacturer column provides the manufacturer or supplier name and is one of three columns included in a basic keyword search.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

SIGNAL WORD

The signal word column provides one of the three potential values for the SDS signal word. Hazardous chemicals will include either “Warning” or “Danger”, while non-hazardous, **and non-GHS compliant*** documents will be blank.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

PICTOGRAMS

The Pictograms column will include any of the nine official GHS pictograms the manufacturer has assigned to the material. If the document doesn’t comply with the modern GHS standard, the GHS strikethrough symbol will appear indicating a non-GHS document.

NON-GHS Compliant Documents (MSDS)*

Documents marked with the “~~GHS~~” icon have been flagged as non-GHS compliant, which means the manufacturer provided document doesn’t meet the modern requirements for a safety data sheet. Specific dangers of these products are not displayed within the DSS system or DSS secondary chemical labels, and employees must be trained to verify the chemical safety information using the MSDS itself.

<input type="checkbox"/>	Hand Sanitizer	Millennium Mat Company	GHS	Janitorial		
--------------------------	----------------	------------------------	----------------	------------	--	--

Non-compliant documents will not include a **Signal Word, Pictograms, Hazard Statements, or Precautionary Statements.**

Pictograms shown in this column can be clicked and assigned as a filter for the chemicals in your library.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

LOCATIONS

The locations column will show any category/location tags assigned to the chemical. Like pictograms, clicking a location tag will apply a filter to your list, showing only chemicals that are tagged as selected.

If multiple location in a hierarchy have been assigned, tags will be nested, by default showing on the parent location with a + icon to indicate that the chemical is also assigned to sub-locations. Clicking the + will reveal sublocations that the chemical has also been assigned.

The location column includes a special filter icon which when clicked will open the location selector dialog. This allows you to apply location filters for tags that may not be visible on any of the chemicals currently shown in your table.

Each chemical also includes an edit icon. Click the icon to open the location selector dialog and manually assign location tags to the chemical.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

SDS DOWNLOAD / UPLOAD

The SDS column displays one of the following icons, and when clicked will initiate their corresponding action.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

SDS Upload



Found in the pending and in-process stages, this icon indicates that a PDF document has not yet been assigned to the chemical. Clicking the icon will open a file-picker and allow you to upload an existing file from your computer.



SDS Download (Single)

This icon indicates that a single version of the safety data sheet is available for download. Click the icon to save the file to your device.



SDS Download (Multiple)

This icon indicates there are several versions of the SDS available for download. Click the icon to save the currently active version. To view the versions available or to change the active version you will need to open the chemical processing window using the action.

ACTIONS

The last column provides you a series of actions that allow you to work with each chemical or request in your list.

<input type="checkbox"/>	Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
<input type="checkbox"/>	Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
<input checked="" type="checkbox"/>	Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
<input type="checkbox"/>	WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
<input checked="" type="checkbox"/>	Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

VIEW SDS

The “View SDS” icon will open the internal viewer so you can quickly view the SDS contents.

ADD LABEL

The “Add Label” icon will create a GHS secondary container label and add it to the first available space in the Label Maker.

PROCESS / EDIT SDS

The “Process SDS” icon will open request editor for processing or modification of the metadata associated with each chemical in your inventory.

SEND TO..

The “Send To” drop down will allow you to move the chemical request between various stages of the life cycle, as well as access to the Delete chemical action.

REQUEST SDS

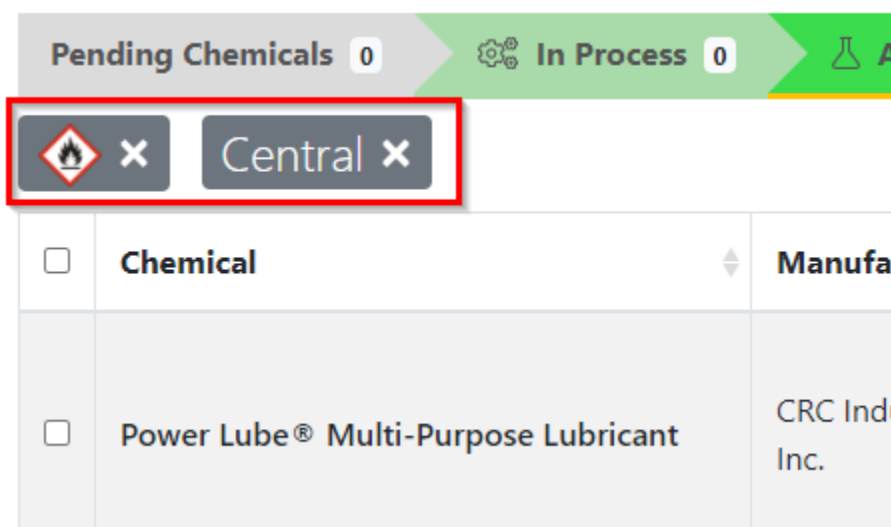
The “Request SDS” action sends the chemical request to the DSS fulfillment team for processing.

FILTERING & SEARCH

By default, the table display available in each of the life-cycle stages will show every chemical currently in that status. The list can be filtered to show only specific data by using the available filters and search capabilities.

FILTER BY CLICK

By clicking on any pictogram or location tag you can immediately filter the table displays by that parameter. Your filter will appear in the top left-hand corner of the table.



Filters are applied to four life-cycle tables, and the number of matching records will be indicated beside the stage title. If multiple filters are selected, records returned will have to **satisfy all** filter criteria.

Remove a filter tag by clicking the **×** close icon.

KEYWORD SEARCHING


You can also filter your chemical lists by using our search feature which can be found above the chemical tables next to the stage selection bar.

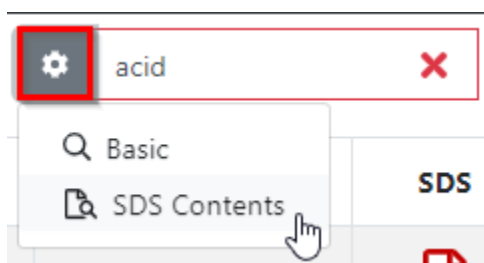


BASIC SEARCH

The default keyword search is called the “basic search” and will filter your chemical records by searching the Product Identifier, Manufacturer, and AKA meta data fields attached to each chemical.

SDS CONTENTS SEARCH

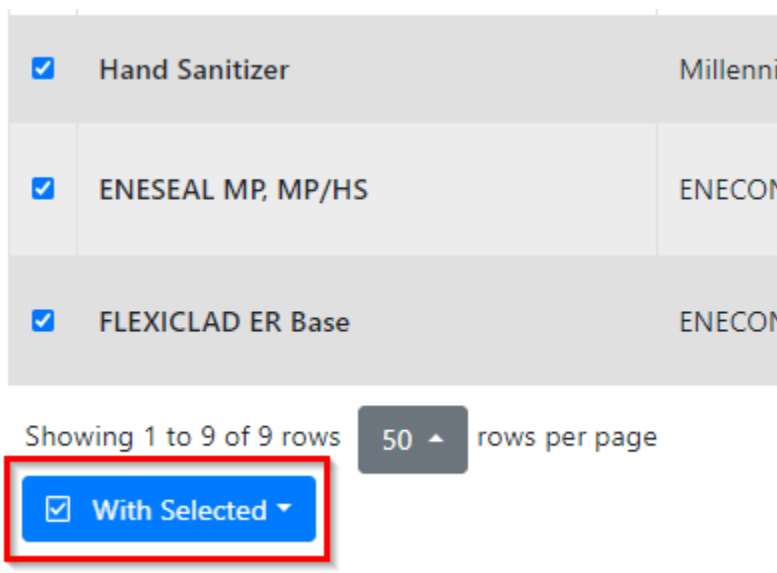
You can also choose to search the contents of the safety data sheets within your library. Use the search settings button  to open the search settings drop-down and switch to the SDS Contents search.



The SDS Contents search will look for your keyword within the text provided by the manufacturer for each safety datasheet.


BULK ACTIONS

When you use the selection checkboxes to select one or more chemicals at a time you will enable the Bulk Actions found in the “**With Selected**” drop-down button on the bottom left hand corner of the screen.



Bulk Actions allows you to take an action on a group of chemicals at one time.

EDIT LOCATIONS

The  **Edit Locations** bulk action, allows you to assign or un-assign location tags to a group of chemicals at one time.


When the “Edit Locations” selection box opens, be sure to understand the meaning of the checkboxes shown.

Empty Checkbox
The chemicals in your selection are/will be unassigned from this location (of currently assigned)

Checked Box (Grey)
The grey checkbox indicates that some, but not all of the selected chemicals are assigned to this location. Tick the box again to assign all chemicals in the selection to the location. Click it a second time to remove the location from all of the selected chemicals. Leave the checkbox alone to maintain the current location assignments for each chemical.

Checked Box (Green)
The green checked box indicates that all of the chemicals are/will be assigned to the selected location.

CREATE BOOK

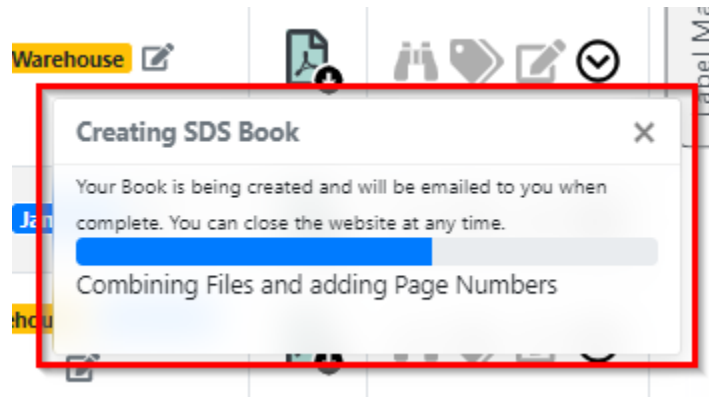
The  **Create Book** action allows you to combine the selected chemicals into a single PDF file with the following features:

- Table of Contents Creation
- Page Re-numbering

No need to wait for the processing to complete

The process of creating a book can take some time if a large number of SDS's have been selected. Once you initiate the book making process, you are free to leave the portal, as a copy of the book will be emailed to you.

If you wait for completion, a blue "Download" button will appear in order to save the file.



DOWNLOAD ZIP

The **Download Zip** bulk action allows you to create a compressed ZIP archive of all the selected documents and save them to your computer.

EMAIL ZIP

The **Email Zip** bulk action allows you to send a compressed ZIP archive of the selected documents to any email address.

Email 3 documents [Close]

Recipient's Email
john@acmecoco.com

Message
John,
Here are the SDS documents for the Main St. job.

Send Email

If you select a large number of SDS documents, the recipient will receive a download link to access the documents.

SEND TO..

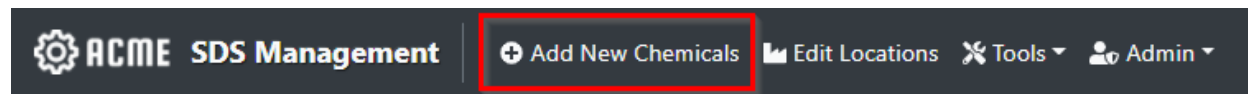
When accessing the bulk actions menu, you may also be provided the option to move all of the selected files into a different chemical request stage.

REQUEST SDS

When accessing the bulk actions menu from the “Pending Chemicals” stage, you will be provided the option to request the SDS’s of all currently selected requests. This moves the chemical requests into the “In Process” life-cycle stage.

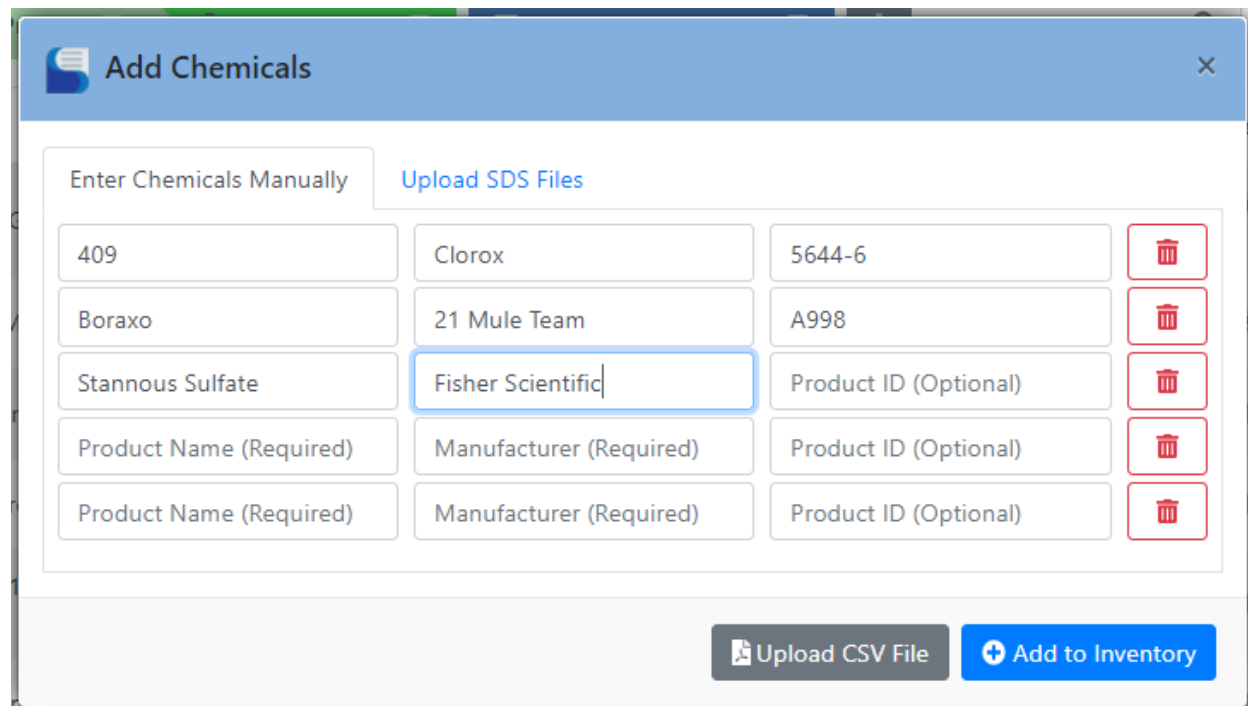
ADDING NEW CHEMICALS

Adding new chemicals to your library is one of the most basic tasks you will find yourself undertaking. We provide several different ways to get your chemical requests into the request life-cycle. The first three methods can be kicked off by an administrator by using the “**Add New Chemicals**” button at the top of your admin dashboard.



MANUAL ENTRY

Chemical requests can be added manually by simply providing information about any particular product. Each request will require at least the product and manufacturer name. If possible, providing the product ID usually speeds the SDS research process as well.

The image shows a web form titled 'Add Chemicals' with a close button (X) in the top right corner. There are two tabs: 'Enter Chemicals Manually' (selected) and 'Upload SDS Files'. The form contains a table with five rows. Each row has three input fields and a delete icon (trash can) on the right. The first row has the values '409', 'Clorox', and '5644-6'. The second row has 'Boraxo', '21 Mule Team', and 'A998'. The third row has 'Stannous Sulfate', 'Fisher Scientific', and 'Product ID (Optional)'. The fourth and fifth rows have 'Product Name (Required)', 'Manufacturer (Required)', and 'Product ID (Optional)'. At the bottom of the form, there are two buttons: 'Upload CSV File' and 'Add to Inventory'.

In toolbox mode **T**, requests will be sent to the “Pending Chemicals” life-cycle stage for location and upload. If you are an enterprise account holder **E**, your request will be sent directly to the Data Sheet Solutions fulfillment team.

CSV UPLOAD

If you already have details about your chemical inventory available in excel, you can easily import the data as requests by uploading a CSV file which contains the required information. Structure your CSV as follows:

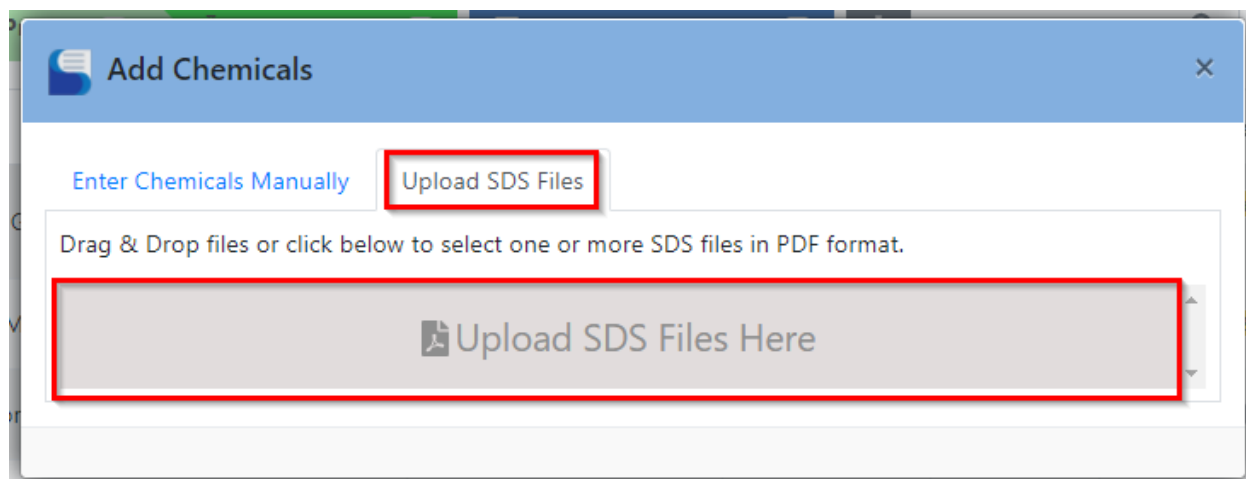
Column A: **Product Name**

Column B: **Manufacturer Name**

Column C: **Product ID**

UPLOAD SDS FILES

If you have already located safety data sheets in PDF format, you can also create requests by uploading those directly into the system. Use the “Upload SDS Files” tab to click and upload or drag and drop SDS files into your library.




When uploading PDF files, they will automatically be run through Optical Character Recognition (if required), auto-indexed, and set to either the pending or in-process stage depending on your package.

When uploading older files, or when scanning and uploading your documents, the OCR process may take a significant amount of time to complete depending on the number of pages.

ADMIN INVENTORY

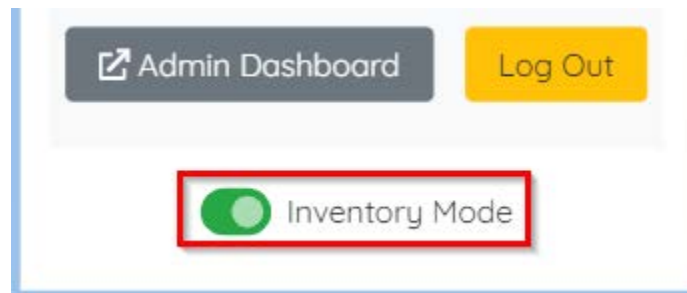
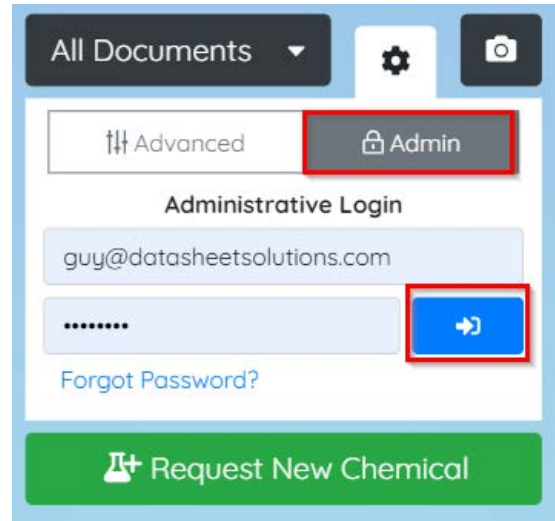
The Data Sheet Solutions SDS Management system also includes a full featured mobile chemical inventory system. If you would like to build your chemical inventory from the ground up, our inventory system is a great way to get your HazCom program off to a good start.

INVENTORY MODE

Because the admin inventory application is designed for your mobile device, tool is built right in to the employee portal. Use the  icon to access the settings menu.

Log In using your administrative credentials.

Activate Inventory Mode by toggling the **Inventory Mode** switch so it is green.



Once you have activated the switch you will be automatically taken to the inventory display.

THE INVENTORY DISPLAY

The inventory display can be accessed by clicking the green **Inventory Mode** button at the bottom of your screen.



When in inventory mode, you will be provided with several areas to add information about a chemical.

1. Location Selector

Use the button at the top of the page to tell the system where you are conducting your inventory. The drop down allows you to select as well as create new locations for your inventory.

2. Product Name

Add the products name here.

3. Manufacturer Name

Add the manufacturer name here. Once you begin typing you may be provided existing manufacturer names as options to select.

4. Item UPC code

If the item has a 12-digit UPC barcode you can type it here to initiate a search, or correlate the chemical you are adding to a particular UPC.


5. Product Number


If the product has a identification number or manufacturers part number, be sure to include it here.

6. Product Photo

Click the icon to take a photo of the product and save it with your request.

The screenshot shows a mobile application interface for adding a chemical to inventory. At the top is a yellow header with the text 'Warehouse' and a red '1.' next to a dropdown arrow. Below the header are three input fields: 'Product Name' with a red '2.', 'Manufacturer Name' with a red '3.' and a checkmark icon, and two input fields for 'Item UPC' (4) and 'Product Number' (5). In the center is a photo icon with a red '6.'. At the bottom are three buttons: a grey menu icon, a green 'Save' button, and a blue 'Scan UPC' button.

You can manually enter the information required, or, if the product has a UPC barcode, you can use the blue  Scan UPC button to open the barcode scanner.

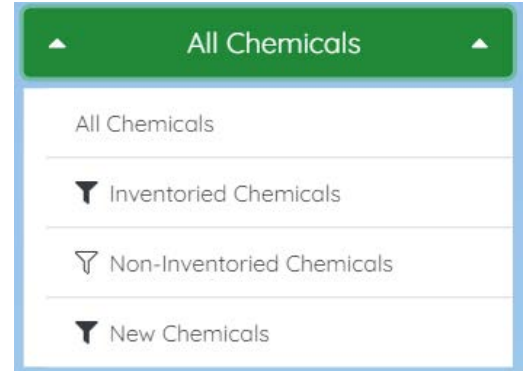
Once you have collected the necessary data, click the green  Save button to assign the chemical to your selected location.

You can leave the inventory display by clicking the grey  Inventory list button.

THE INVENTORY LIST

While in inventory mode, you can also navigate back the chemical list to view information about the chemicals in your inventory and their status.

While in this mode you will have access to the inventory filter. The filter allows you to browse a locations chemical list based on inventory status.



All Chemicals

Shows all chemicals whether they have been inventories or not.

Inventoried Chemicals

Will show all chemicals inventoried at your currently selected location.

Non-Inventoried Chemicals

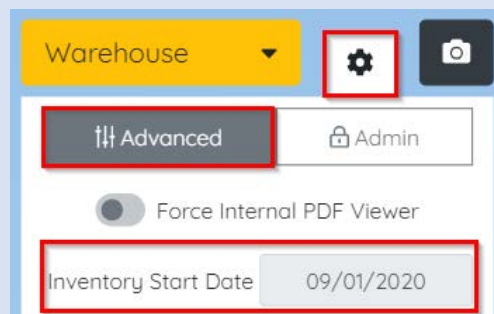
Will show you all chemicals assigned to the currently selected location that have NOT been inventoried yet.

New Chemicals

Will show you only new Chemicals that have not been previously inventoried at the selected location.

Inventory Start Date

The inventory tool is designed to support reoccurring inventories, and the filters shown above rely on the “**Inventory Start Date**” setting found in the Advanced settings area.



Set the inventory start date as the first day of your current inventory. This will ensure that you Inventory filters show the appropriate data.

INVENTORY STATUS ICONS

The inventory list features status icons that tell you about each chemical's status as it relates to your selected location. **Clicking** any of the status icons shown below will mark that chemical as "inventoried" in the currently selected location.



Green Solid Checkbox

The chemical has been inventoried in the currently selected location.



Green Hollow Checkbox

The chemical has been inventoried at a sub-location of the currently selected location.



Location Icon

The chemical has been previously assigned the currently selected location's tag, but has not been inventoried there.




Empty Checkbox

The chemical has not been assigned to or inventoried at the currently selected location.

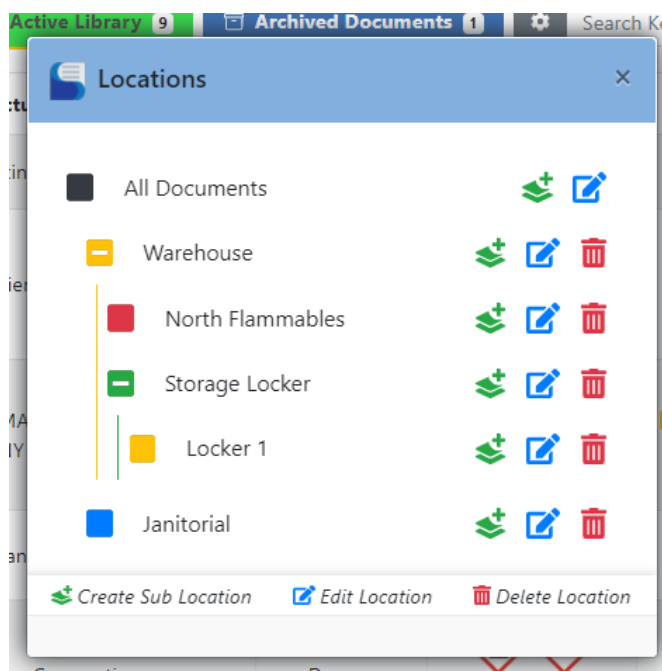
EDIT LOCATIONS

The Edit Locations button allows you to manage your location/category tag hierarchy. These special categorizations can be applied to the chemicals in your library.

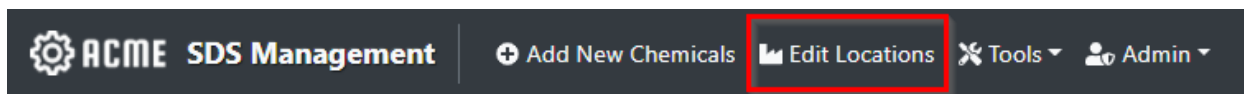
The system consists of a folder-like structure where locations can have parent / child relationships.

If you see a box like this , you can click it to see child locations created beneath that category.



The names and colors of your locations can be customized in the location editor.

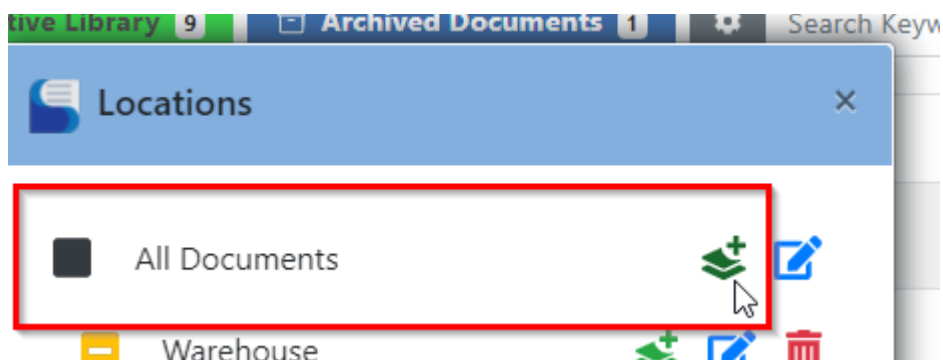


To access the location editor, click the Edit Locations button in the top bar.





ADDING A NEW LOCATION

The green  Add Sub Location button allows you to create a new location/category. All user created locations will be a sub-location of the master “All Documents” location. To create a “Top-Level” location, you would click the  Add Sub Location button next to the “All Documents” category.




ADDING A SUB LOCATION


Custom Sub-Locations are added in the exact same way, choose the green  Add Sub Location button next to the location you would like to be the “Parent” of the location you are creating.

Provide a name and select a color for your new location. Be sure to click the green  Save button to store your changes.




EDITING LOCATIONS

Location names, colors, and parent/child relationships can be edited by clicking the blue  edit button beside the location.

This will open the location editor allowing you to change the name or color of the location tag. You can move the location beneath a new parent by dragging the  icon and releasing over a new parent category. You can **not** re-order the locations.

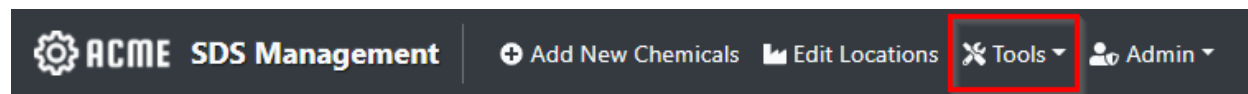
DELETING LOCATIONS

Delete a location by clicking the red  delete button and verifying your intention. No chemicals will be removed from your library. The location tag will simply be removed from any chemicals previously assigned.





TOOLS

The tools menu provides access to several utilities allowing you to monitor and export chemical information as well as create or edit user accounts. The tools can be accessed by clicking the tools menu item in the top bar.



REPORTS

Clicking the  Reports menu item in the  Tools Menu will open the Reports window, which allows you to customize an excel file export using the data stored within your portal.

REPORT LOCATIONS

Use the “Report Locations” drop down to select which location tags you would like included in your report. Choose the **Include Sub-Locations** checkbox if you would like to create separate tabs for each location within your excel document. The default setting will include all documents.

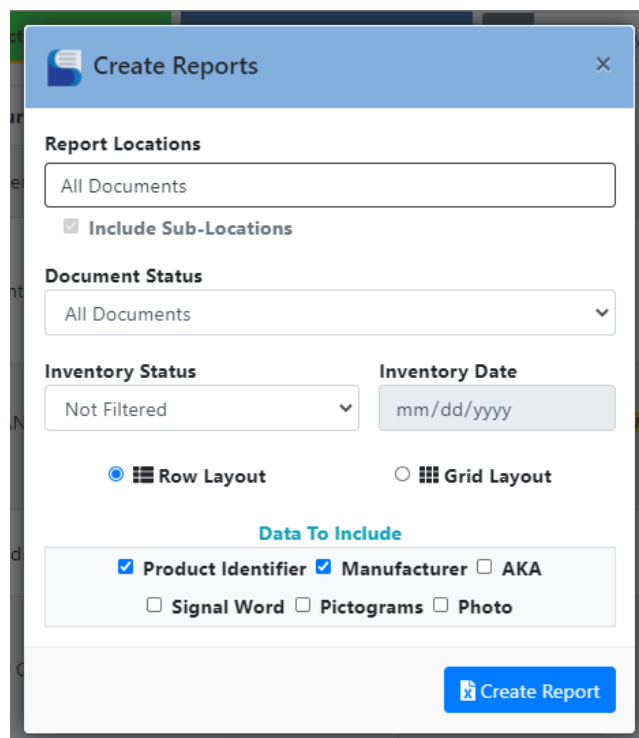
DOCUMENT STATUS

The Document Status drop down allows you to filter your excel document by chemical request stage.

INVENTORY OPTIONS

The **Inventory Status** and **Inventory Date** options can be used if you have previously conducted an admin inventory. The inventory options provide the following report types:

- **Inventoried**
Use this filter to show only chemicals that were inventoried on or after the selected Inventory Date
- **Not Inventoried**
This filter will create a file showing only chemicals that were NOT inventoried on or after the selected Inventory Date
- **First Time Inventoried**
This selection will show you chemicals that were inventoried for the first time ever on or after the selected Inventory Date




The screenshot shows the 'Create Reports' window with the following settings:


- Report Locations:** All Documents
- Include Sub-Locations:**
- Document Status:** All Documents
- Inventory Status:** Not Filtered
- Inventory Date:** mm/dd/yyyy
- Layout:** Row Layout, Grid Layout
- Data To Include:**
 - Product Identifier
 - Manufacturer
 - AKA
 - Signal Word
 - Pictograms
 - Photo

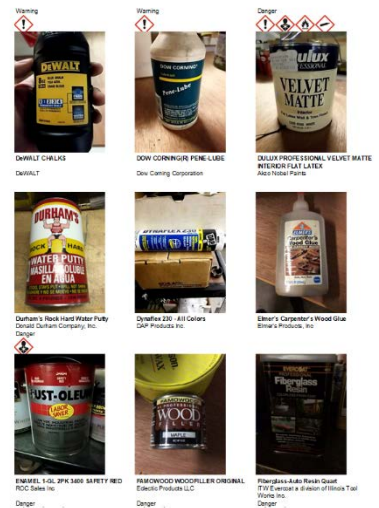
A 'Create Report' button is located at the bottom right.

LAYOUT CONTROL

The Layout Control allows you to control how the exported excel document is structured.

The  Row Layout creates a standard 1 chemical per row excel sheet.


The  Grid Layout is designed for users who would like chemical photos to be featured in their file and creates a three-column layout for printing.





DATA TO INCLUDE

The **Data to Include** section allows you to customize what columns will appear in your spreadsheet. Adding chemical photos will significantly increase the size of your file.

LOGS

The Logs menu item in the  Tools Menu will provide you access to a low-level logging data that captures chemical additions, portal views and location modifications.

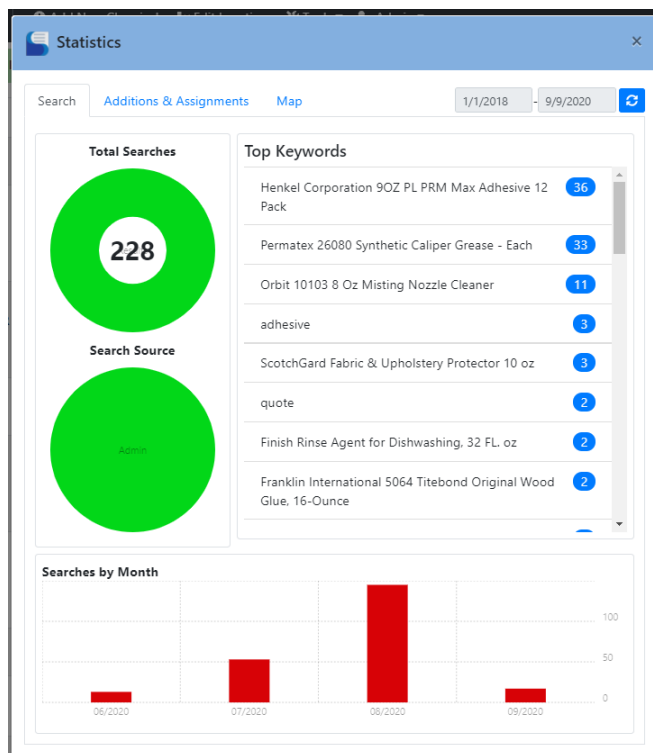
STATISTICS

The  Statistics menu item in the  Tools Menu will open the Statistics window providing you insights into chemical searches, addition and assignments, as well as an access map.

SEARCH

The search tab provides you information on the number of searches performed (while online), and the keywords which were searched. The Top Keywords table will also show you the number of times that particular term was searched.

The bottom of the search tab shows you the number of searches over time.



ADDITIONS & ASSIGNMENTS

The Additions & Assignments tab consists of several tables that details information about administrator activity in the portal.

- **Administrators**

The administrators table will show you a list of administrators who have been active adding new chemicals or assigning existing chemicals to a location. The **red number** indicates the number of chemicals the administrator added to the portal. The **blue number** represents the number times the user assigned a chemical to a location.
- **Locations**

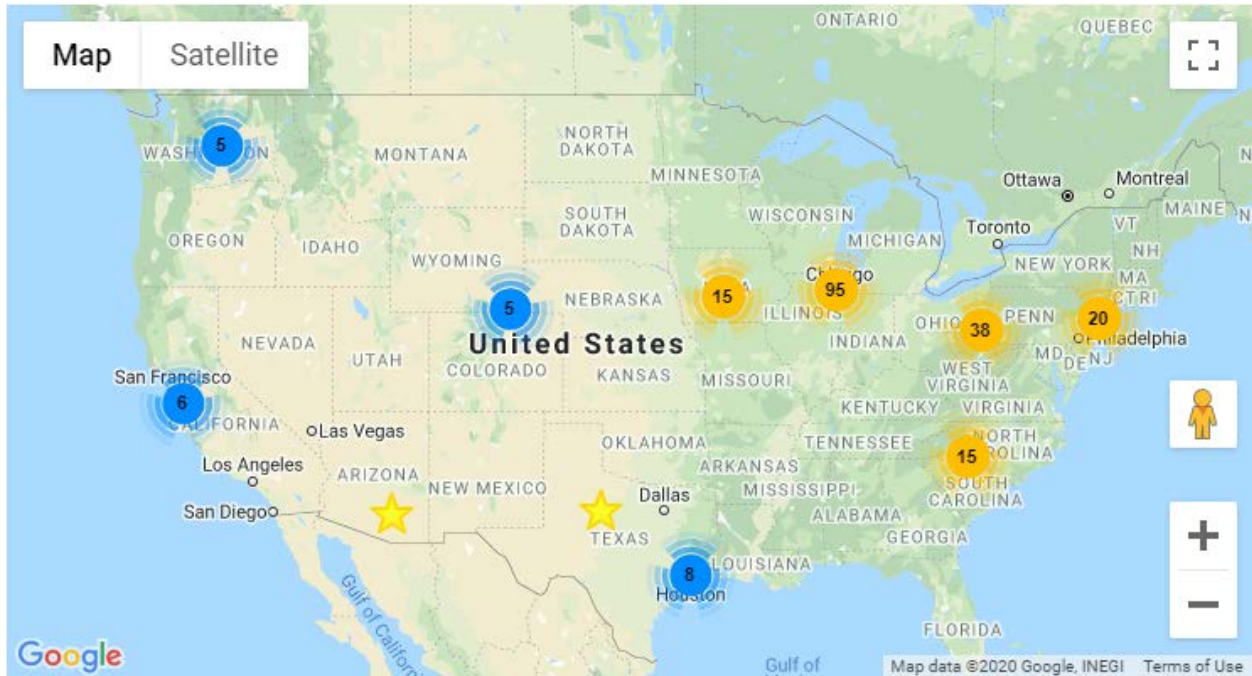
The locations table shows the various location tags with the **blue number** indicating the number of chemicals assigned to that location in the selected date range.
- **Chemicals Assigned**

The chemicals assigned table show you the name of chemicals and the number of times they were assigned to different locations in **green**.
- **Assignments Timeline**



The assignment timeline shows the number of times chemicals were assigned to locations over time.

MAP

The map tab correlates IP addresses that have been recorded as visiting your employee portal with a geographic location.









USER ADMINISTRATION

Clicking the  User Administration menu item in the  Tools Menu will open the User Administration window, allowing you to create, edit, and delete admin accounts and user groups.

USERS


The Users tab of the User Administration window allows you to create, edit, and delete user accounts.

<input type="checkbox"/>	Last Name	First Name	Email	Groups	Actions
<input type="checkbox"/>	Rogers	Bill	billr@mailinator.com	locationPOC	 
<input type="checkbox"/>	Smith	John	johnsmith@mailinator.com	Super Admin admin	 
<input type="checkbox"/>	Thomas	Guy	guy@datasheetsolutions.com	Super Admin admin	 

Showing 1 to 3 of 3 rows

[Create New User](#) [Create New Group](#)

ADD A USER

To create a new user, select the  **Create New User** button to open the Create User window.

User Info

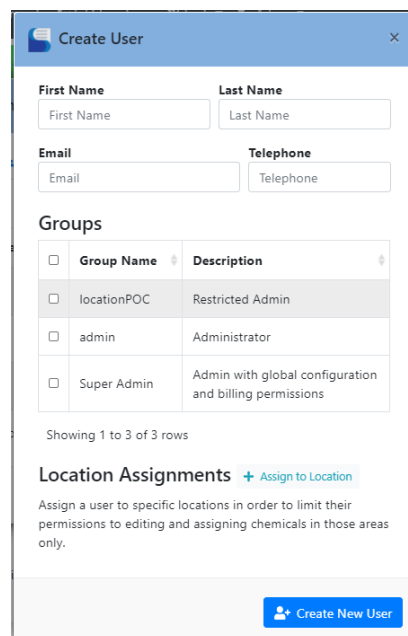
Provide the user's first and last name and email address. Upon creation of the user account, an email will be sent to the email address provided prompting them to setup their password.

Groups

Select the Group or Groups you would like the account to be categorized as. See the groups section for more information regarding groups.


Location Assignments

If the user will be assigned to the locationPOC group, be sure to assign them a location tag to work beneath.



Group Name	Description
locationPOC	Restricted Admin
admin	Administrator
Super Admin	Admin with global configuration and billing permissions

EDIT A USER

To edit a user, select the blue  User Edit Icon. This will open the Edit User window and allow you to make modifications to the user's information, groups, and location assignments.

You can also change or set a user's password.

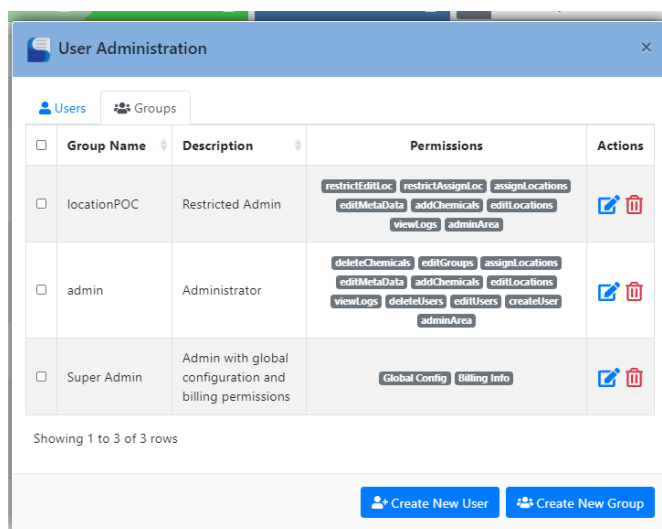
GROUPS







User groups allow you to enable or restrict certain activities based on their inclusion in a group. Each group has certain permissions assigned to it, which enables this control.

The default groups are as follows:

Admin

The admin group has access to almost all functionality. Users in the admin group are only restricted from the billing area and the global configuration options.



Group Name	Description	Permissions	Actions
locationPOC	Restricted Admin	restrictEditLoc, restrictAssignLoc, assignLocations, editMetaData, addChemicals, editLocations, viewLogs, adminArea	 
admin	Administrator	deleteChemicals, editGroups, assignLocations, editMetaData, addChemicals, editLocations, viewLogs, deleteUsers, editUsers, createUser, adminArea	 
Super Admin	Admin with global configuration and billing permissions	Global Config, Billing Info	 

Super Admin

The super admin group adds the missing billing and global configuration options to the admin account. If a user needs full control they will need to be members of both the **Admin & Super Admin** groups.

Location POC

The location POC group is designed to provide limited access to admin functions based on locations. Users in this group can only edit, add, and delete locations at or beneath their assigned area. Users here also are restricted from deleting chemicals from the library.


Users assigned to the locationPOC group, also need to be assigned a location in the Edit User window.

PERMISSIONS

Permissions are the building blocks of the user groups. When creating or editing a group you select the permissions assigned. The table below describes each permission.

Permission Name	Permission Description
deleteChemicals	Allows user to delete chemicals from database.
restrictEditLoc	Restricts a user to editing and creating locations under the locations they are already assigned to.
restrictAssignLoc	Only allows user to assign chemicals to locations they are assigned to.
Billing Info	Allows for viewing and changing parameters associated with billing.
Global Config	Allows for updating and modifying global parameters displayed in the admin area and the employee portal.
editGroups	Allows user to make changes to User Groups.
assignLocations	Allows user to assign a location for a chemical
editMetaData	Allows user to edit the meta data for each SDS
addChemicals	Allows users to request new chemicals for the library
editLocations	Allows user to create, edit, and delete locations
viewLogs	Allows user to see logs
deleteUsers	Can delete other users
editUsers	Can edit other users
createUser	Can Create New Users
adminArea	Can Login to the Admin area

CREATE A GROUP

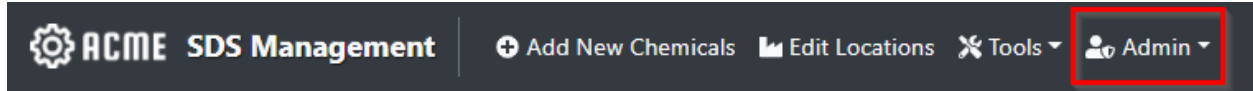
You can create a new group within the Groups tab by clicking the  **Create New Group** button. This will open the Create Group window where you can name the group as well as assign the desired permissions.

EDIT A GROUP

Clicking the blue  group edit button, will allow you to change the details of an existing group.


SUPER ADMINISTRATOR

When assigned as a Super Admin, you will have access to a new top bar menu item called “Admin”



The Admin menu contains tools related to billing and the global configuration of your SDS portal.

GLOBAL CONFIGURATION

Clicking the  Global Configuration menu item will open the Global Configuration window.

BUSINESS NAME & LOGO

The “General” tab of the Global Configuration window includes the following options and settings.

Business Name

Control how the name of your organization appears on emails.

Enable Employee Chemical Request Form

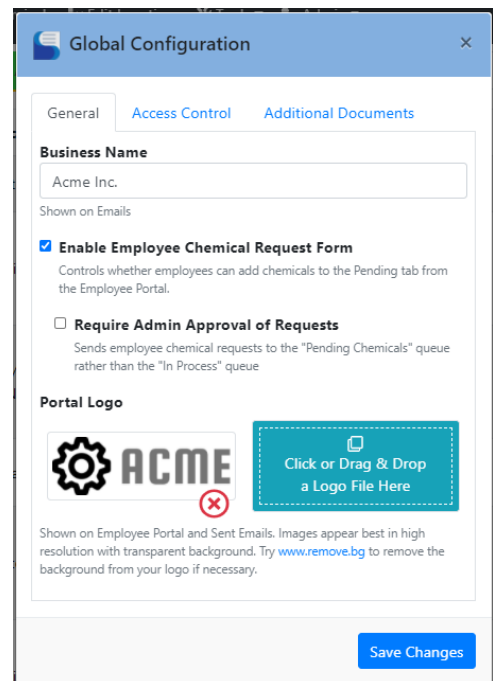
Check this item if you want the Green “Request New Chemical” button to be available in the employee portal.

Require Admin Approval of Requests E

Enterprise users can leave check this option to force requests added by employees to be assigned to the Pending Chemicals stage, rather than automatically being sent to the “In Process” stage.

Portal Logo

The logo added here is shown in the employee portal, the admin top bar, as well as on emails sent from your portal. The logo should be a transparent PNG file.



ACCESS CONTROL

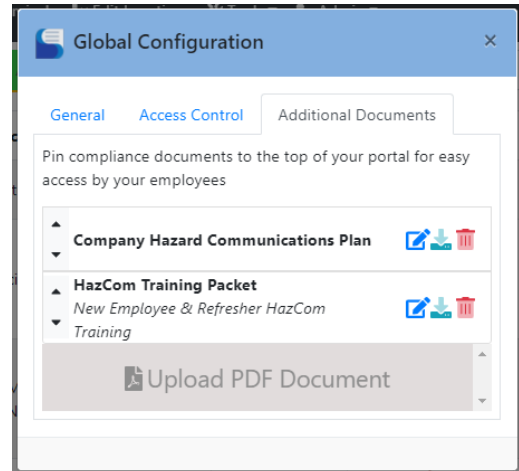
The access control tab allows you to limit access to the employee portal by requiring a password.

ADDITIONAL DOCUMENTS


The additional Documents tab allows you to pin non-SDS documents to the top of your portal. This can be useful for providing a convenient place for your team to access HazCom plans and other required safety information.

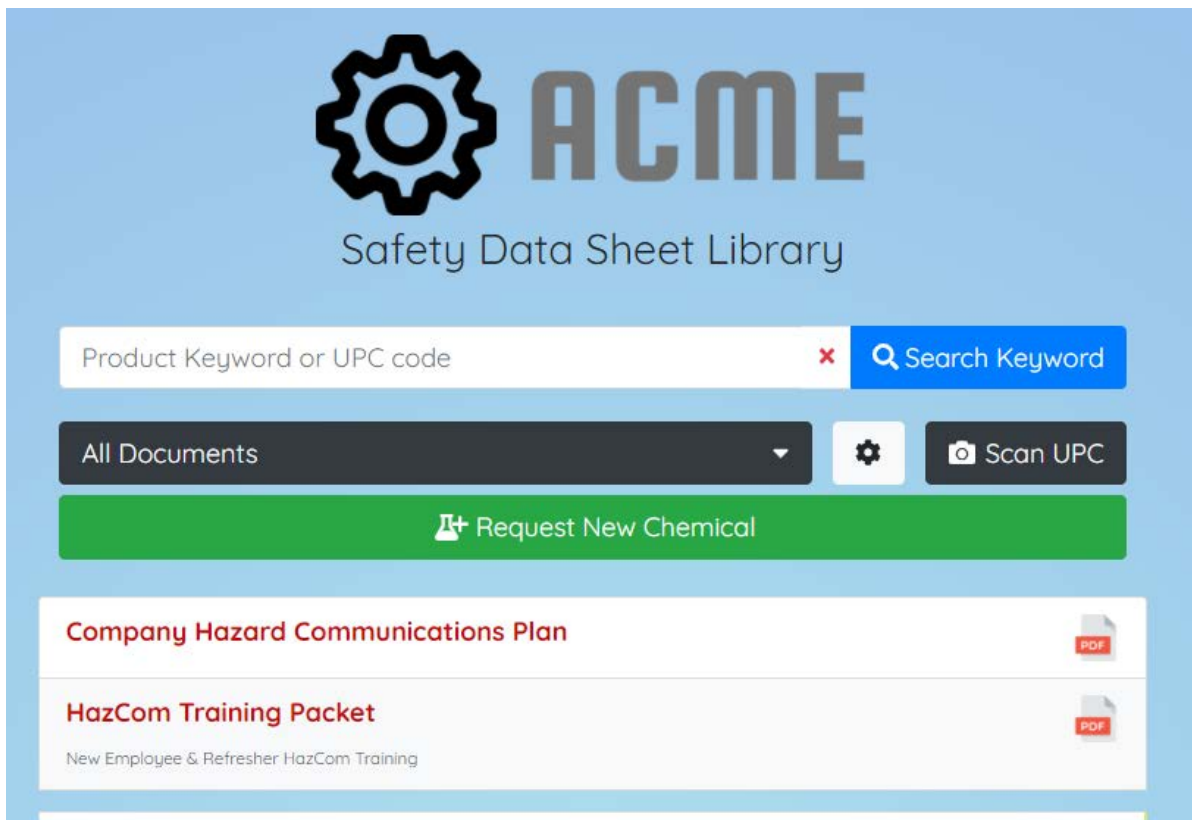
ADDING DOCUMENTS

To add a new document, use the “Upload PDF Document” box to drag & Drop or click and upload the PDF file.



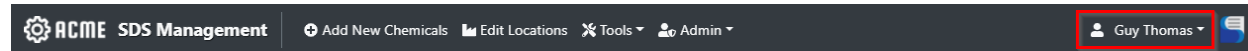
EDITING DOCUMENTS

After upload, you can edit the name and description of the file by clicking the blue  edit button. These documents will appear in your employee portal as shown below:



USER PROFILE

All users have access to the User Profile drop down menu which is located in the top-right of the black top bar.



EMAIL NOTIFICATIONS

Clicking the “Email Notifications” menu item will open the Email Notifications window.

The Email Notification window allows you to set or edit how often you would like to receive emails from the system based on portal events.

Employee Requests

This notification will provide information on any new requests sent in through the employee portal.

Fulfilled Requests

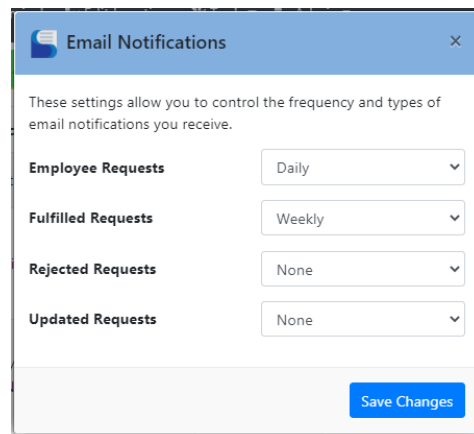
This notification will provide information on any chemicals moved into the “Active Library”

Rejected Requests **E**

This notification will provide you an alert of the DSS fulfillment team has rejected a request, sending it back to your Pending Chemicals stage.

Update Requests **E**

This notification will provide information when a chemical in your active library has been updated by the DSS fulfillment team.



EDIT PROFILE

Clicking the “Edit Profile” menu will open the “Edit User” window and allow you to update details of your own profile if permissions allow.

LABEL MAKER

The secondary container label maker provides you the ability to create GHS compliant labels using the printers and labels you already have. To open the label maker click the label maker tab at the bottom right hand side of the screen.

The label maker slides out of the right side of your screen to take up about 50% of your monitor.

At the top of the label maker you will find several options for setting up your secondary container labels. The grid represents the labels to be printed.

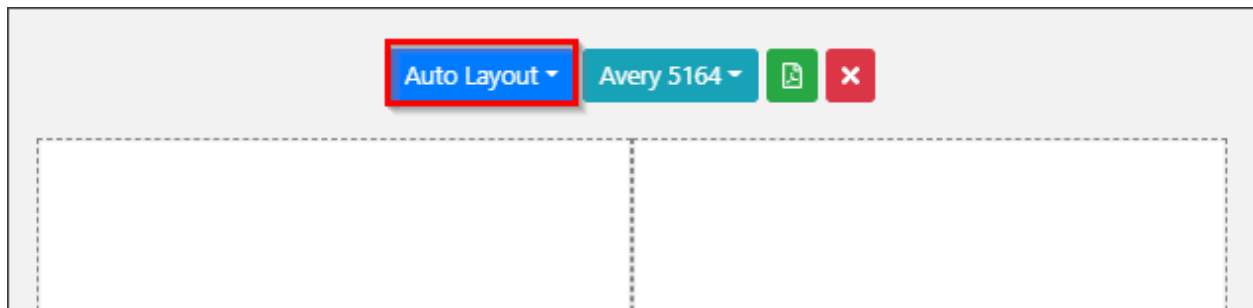


LAYOUTS

The layout button provides two options for laying out your labels.

The default “**Auto Layout**” creates a fully GHS compliant label, and is suitable for larger labels that allow us to include all of the required data.

To facilitate the use of smaller labels we have also created a “**Minimal Label**”, the minimal label leaves out the precautionary statements.




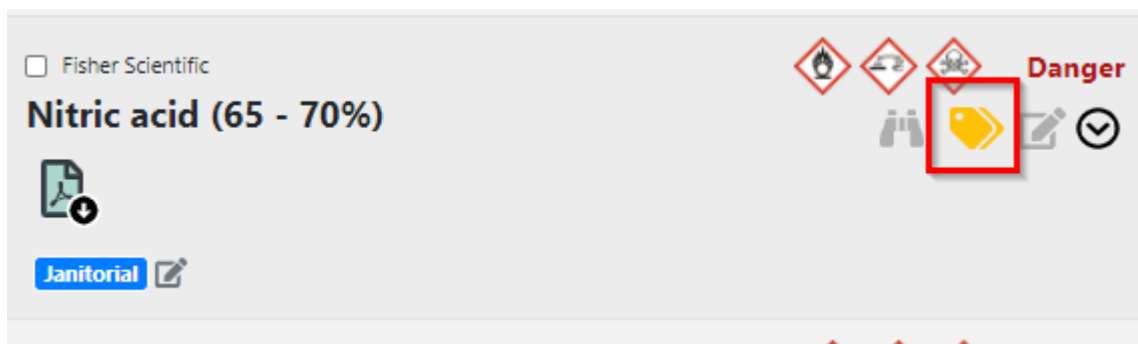
TEMPLATES

The second button allows you to select the label template corresponding to the labels you have on hand. If you have a label size that is not included on our list, please contact us and we will get it added.



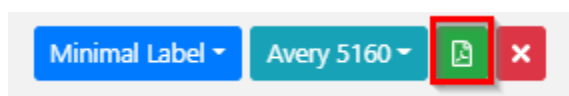
ADDING A LABEL

You can add a label to your template by clicking the  Add Label button on the corresponding chemical. This will automatically create a secondary container label into the first available space on your template.

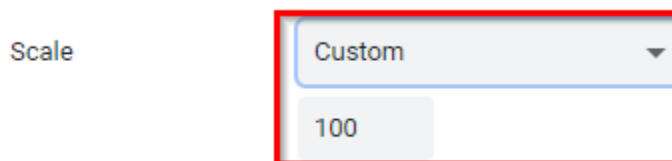


PRINTING YOUR LABELS

Click the green PDF button to create and save your PDF label sheet to your computer.



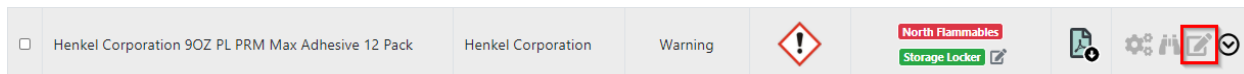
When printing, be sure to scale the pdf at 100% for accurate printing.



PROCESSING SDS DOCUMENTS

SDS documents uploaded in toolbox mode will require you to process the document into the system.

To access the SDS processing window, click the "Edit" action for the desired chemical.



PROCESSING WIZARD

The processing wizard is the default view within the SDS processing window.

The screenshot shows the 'ACME SDS Management' interface. The left pane displays a PDF of a Safety Data Sheet for Henkel Corporation. The right pane shows the 'Product Identifier' step of the wizard. The wizard has tabs for 'Wizard', 'Expert', and 'Save'. The 'Product Identifier' step includes a text input field with the text 'Henkel Corporation 90Z PL PRM Max Adhesive 12 Pack' and a 'Save Existing Name as AKA' button. A light blue box contains the text: 'If you have already entered a more descriptive name than that shown on the SDS, we can save that information so employees can search for it. Click the button above to move your current chemical name to the "Other Names" section.'

Safety Data Sheet

Revision Number: 002.0 Issue date: 09/29/2017

1. PRODUCT AND COMPANY IDENTIFICATION

Product name: Loctite PL Premium Max Construction Adhesive IDH number: 2292244
Product type: Adhesive
Restriction of Use: None identified Region: United States
Company address: Henkel Corporation
One Henkel Way
Rocky Hill, Connecticut 06067
Contact information: Telephone: +1 (800) 624-7767
MEDICAL EMERGENCY Phone: Poison Control Center 1-877-671-4606 (toll free) or 1-303-592-1711 TRANSPORT EMERGENCY Phone: CHEMTREC 1-800-424-9300 (toll free) or 1-703-527-3887

2. HAZARDS IDENTIFICATION

EMERGENCY OVERVIEW
WARNING: MAY CAUSE AN ALLERGIC SKIN REACTION.
CAUSES SERIOUS EYE IRRITATION.

HAZARD CLASS	HAZARD CATEGORY
EYE IRRITATION	2A
SKIN SENSITIZATION	1


PICTOGRAM(S)

The wizard takes you step-by-step through the meta data extraction required for adding to your chemical inventory.

The left side of the screen displays the PDF file you have associated with the Safety Data Sheet.

The right side of the screen shows the processing wizard steps.

Each step will ask you to enter or select data from the Safety Data Sheet.

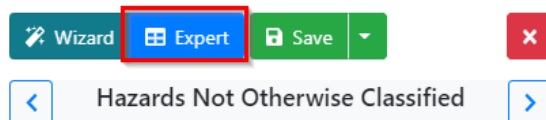
When complete, select the  next arrow to move on to the next step.

The Data Sheet Solutions AI will automatically attempt to locate and extract most of the required data for you. When this happens, you should review to ensure the accuracy of the AI system.

The close-up screenshot shows the 'Product Identifier' step of the wizard. The text input field contains 'Henkel Corporation 90Z PL PRM Max Adhesive 12 Pack'. The 'Save Existing Name as AKA' button is visible. The light blue box contains the text: 'If you have already entered a more descriptive name than that shown on the SDS, we can save that information so employees can search for it. Click the button above to move your current chemical name to the "Other Names" section.'

EXPERT MODE

You can also elect to view and extract the required meta data in “Expert Mode”, access expert mode by clicking the “Expert” button.



Expert mode is divided into several tabs. Each tab provides you access to different meta data.

GENERAL INFORMATION

The general information tab shows you basic product and manufacturer info. You can also associate a product Barcode by adding it to the **Chemical Barcode** field.

HAZARD INFORMATION

The hazard information tab allows you to associate important hazard meta data.

NOTES

The notes tab provides you a place to add notes shown only to administrators.

VERSIONS

The versions tab provides you access to any previous version of the chemical’s safety data sheet. The version will automatically be populated if you are an Enterprise customer.

You can download and assign your own new version of a Safety Data Sheet by using the **Upload Newer Version of SDS** button.

Emergency Phone	SDS Revision Date	Chemical Barcode
(860) 571-5	09/29/2017	079340652

Active	Date	File Download
<input checked="" type="checkbox"/>	09/29/2017	plmaxpdf18991.pdf

[Upload newer version of SDS](#)

When complete be sure to save your work with the green Save icon.