Environmental > Strategic Services

Hazardous Materials Management System (HMMS)

HMMS Material Training Manual

HMMS
Hazardous Material Management System

IHS

The Source
for Critical Information and Insight™

CONTENTS

HMMS OVERVIEW

HMMS is designed to track and manage the use of hazardous materials (HAZMAT). The system records the type and quantity of hazardous material issued to an employee, the building the material was dispensed from, the time of issue, and which zone the employees are assigned to, along with their supervisor.

There are several objectives of HMMS:

- Protecting the site work force from the effects of hazardous chemical exposures by making accurate information readily available in the work areas.
- Ensuring compliance with Occupational Safety and Health Agency (OSHA) and Environmental Protection Agency (EPA) regulations governing hazardous material use. HMMS provides an on-line reporting mechanism to track information such as: ozone depletion, chemical Shelf Life Extension Data (SLED), material issues, etc.
- Providing a better mechanism to control the issue and use of hazardous materials in the work force. This allows for greater conservation, maximum utilization, and lessened procurement of hazardous materials, which equates to a healthier environment.
- Lowering costs by reducing hazardous material acquisition. These savings also extend to reducing wasted manpower and paper consumption by providing an electronic mechanism to produce Material Safety Data Sheets (MSDSs) and ingredient information. With HMMS this is done at the point of material issues, as opposed to manual research via microfiche or office file cabinets.
- Tracking issues and transactions for reporting and historical record keeping. With HMMS, there is automated accountability and tracking of every item issued, for both the HMMS operator and the employee accepting the hazardous item.

Passwords

To protect individual privacy data access to the system needs to be limited to those users having a need to use it in order to accomplish the mission of the site. The HMMS System Administrator controls this access. The HMMS administrator will issue a user ID and password only to those requiring access to the system. Users having access to the system must take precautions to safeguard their passwords and any privacy data they use to provide the intended system functionality.

Password Guidelines

It is required that users periodically (for example, every 90 days) change their passwords. The following guidelines apply:

- The passwords must be at least eight characters long.
- They must be strong passwords, using both upper and lowercase alpha characters, at least one numeric which cannot be the first or last character and one special character. The acceptable special characters are !, $, (,).
- The password must be a non-dictionary word.
- The password cannot be your user id.
- The new password must have at least three different characters.
- The user password can only be changed once in a 24-hour period.

Note: If the users log in fails three consecutive times then the users account will be locked. Also if the user account is not accessed for a period of 30 days or more, the user account will be locked. It will require the Password Administrator to unlock the account.

When any individual no longer requires access to the system their user ID and password should be made inactive as soon as possible. This may happen when someone retires, is transferred, removed for cause, or other circumstances.

Division of Responsibilities

This system requires division of responsibilities that will vary somewhat depending upon the management structure at each site.

- Geographical work areas at each site should be divided into environmental zones to optimize accurate tracking and licensing of various chemicals.
- Each zone should be assigned a name and/or number association and have a Zone Manager/responsible person(s), which is entered into the zone edit screen along with a description of the work processes in that zone.
- Supervisors (of record) are assigned to identify the chain of responsibility. The supervisor(s) are assigned to zones for which they assume full or shared responsibility to enforce compliance with regulations, policies, process and procedures.
- Employees are then assigned to zones according to their work requirements and supervisor (of record). When employees request hazardous materials from an Issue Point (IP), they must give their zone name/number, supervisor and an employee number; the system will verify their zone is licensed to use the particular material and that the employee is assigned to the zone.

Profiles

Various forms are accessible to the user through menus. Users will be assigned profiles, which govern the functions listed on their menu. For example, the Issue Point (IP) may be limited to the menu items specific to that function, such as material issues and MSDS information.

This allows the system administrator to assure that users only be allowed access to those screens that are necessary for their job function.

Each operator of HMMS must have specific access to the system provided through userid and password. When the user is set up on the system, depending on what the requirements of his or her functions are in HMMS, the user's individual access to the various functions on the system will vary based on job requirement.

Entering Data in the Fields

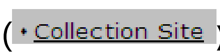
There are numerous ways to enter data in fields in HMMS, and there are fields of different types. In some fields you can enter text directly into the fields.

Fields with a Plus sign (+)

These fields are required, that is the record cannot be saved unless there is data in the field.

Fields with the field name in brackets ([ ])

These fields are read-only, that is you cannot change data in those fields. You can click in the fields and enter text in those fields, but those changes will not be saved.

Fields with underlined field names ()

These are called "Label Links". You can click on the field name to open a read-only record of the associated record. For example, if you click on the *Waste Collection Site* label link while in the *Fill Container* screen, a new browser window with the record of the *Waste Collection Site* displayed in the field will open. You will not be able to modify information in that new browser window.

Fields with a pull-down arrow ()

Click the arrow to display a list from which you can choose an item. The items in the list are typically entered in the *Administration/System/Edits* screen.

Fields with an LOV icon ()

Click the icon to display a list from which you can choose an item. The items in the list are typically entered in other screens. For example, if assigning a waste profile to a container you will click on the icon to display a list of waste profiles you have entered at your facility.

Alternatively, you can enter text directly into the field. The field will automatically fill based on existing data. For example, you have three employees with a last name beginning with “W”; Wood, Woods, and Woodson. When entering “Wood” you would only have to enter “W” then tab to the next field, the field will automatically fill based on alphabetical order. If you want to enter “Woods”, you would have to type in the whole name before tabbing to the next field. If you wanted to enter “Woodson” you would type in “Woodso” before tabbing to the next field.

> **NOTE:** This LOV validates the data that is manually inputted against the contents of the LOV. The LOV shown below does not validate the data being inputted against the contents of the LOV, it adds the inputted data to the LOV.

Fields with an LOV entry icon ()

Click the icon to display a list from which you can choose an item. Additionally, you can type data directly into the field. In some instances the text you enter will be added to the list that displays the next time you use the field.

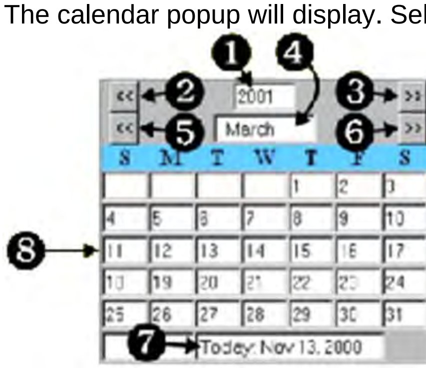
> **NOTE:** In a LOV pop up screen, after scrolling to the bottom of the display and not finding the data needed, use the ***Home*** key to return to the top of the display.

Entering Dates

Entering dates in HMMS is an automated process. Wherever dates are entered in HMMS, the same procedure can be used.

Entering Dates in Fields

1. Click on the  calendar icon beside the date field.
2. The calendar popup will display. Select the date you want to enter into the field.



1) The selected year.
2) Click to decrease the selected year.
3) Click to increase selected year.
4) The selected month.
5) Click to decrease the selected month.
6) Click to increase selected month.
7) Today’s date.
8) The calendar for the selected month and year.

- Click on today's date (7) to select it.
- Click on a day in the current month (8) to select it. The current month's calendar automatically displays when the calendar popup screen displays.
- Navigate to the month and year in which the date you want to enter is located ((2), (3), (5), (6)), then click on the appropriate date in the calendar (8) for that month.

3. You will be automatically returned to the screen in which you were entering the date. If the date is incorrect, you can reenter it.

Querying Overview

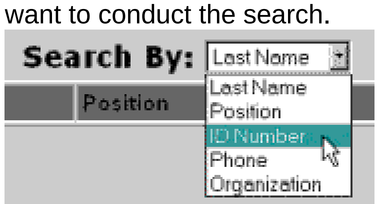
Querying is used to look up information in HMMS. Once the records are retrieved, they can be reviewed, modified, or deleted. Since there can be literally tens of thousands of records to review a quick way of finding the records you need is critical.

With a few minor exceptions, querying works the same in all HMMS screens. An advanced search feature is available on selected HMMS screens.

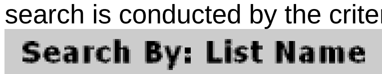
Performing a Query

With a few minor exceptions, querying works the same in all HMMS screens.

1. In the *Search Criteria* field on the *Employee Screen*, enter the criteria on which you want to conduct the search.



On screens without a selectable *Search By* field like the *Chemical List Screen*, the search is conducted by the criteria displayed on the screen.



2. You then have two different ways to search the data for the records you want.

- Click the  icon next to the *Search Criteria* field. This will display all the records in the database for the screen you are using.
- Directly enter the search criteria in the *Search Criteria* field. For example, if you want to find an employee with the last name of "Jones", select Last Name in the *Search By* field and enter "Jones" in the *Search Criteria* field.

Note: This option is the most accurate form of simple querying. The more detailed the criteria you provide, the fewer returns you will receive on your query. This will reduce the time it takes to find the record you are looking for.

- Using Wildcards:
  - You can use the “%” symbol as a wildcard; it is used in place of one or more unknown characters in a field.
    - If you know the field on which you are querying begins with the number 65, and the other numbers are unknown, enter 65% and execute the query. Every number that begins with 65 will be retrieved.
    - If you enter %65, every number that ends in 65 will be retrieved.
    - If you enter 6%5, every number that begins with 6 and ends with 5 will be retrieved, no matter how many characters come between 6 and 5.
    - If you enter %65% every instance of the numbers 6 and 5 appearing in that order will be retrieved.
  - You can use the “_” symbol as a wildcard also. It is used to replace a single character in your search criteria.
    - Example – grey paint or grey RTV. What spelling for grey was used? Was it spelled grey or gray? By replacing the vowel with the “_” the search will return both spellings.
- To quickly determine the number of rows the search will return click on the # icon. The number of rows will be displayed.
- After entering the search criteria, click the GO! icon.

3. Once you receive the results of the query you will be able to sort the resulting records by clicking in the header row for a column. This will sort the data on the screen by ascending order in the column you are clicking on.

   Click on the column header of the row you want to sort by. After clicking on the column heading, you will see an up arrow (▲) beside the label in the column. Clicking the column header again will display a down arrow (▼) and will sort the data on the screen by descending order in the column you have selected.

4. Once you have the items sorted the way you want you can use the on-screen buttons to navigate through or print the data on the screen. Perform the functions by clicking on one of these buttons near the top of the screen:

⏮	Displays the first page of records returned by the query. If you are at the first page of records clicking this button will refresh the current page.
◀	Displays the page of records previous to the one on the screen. If you are at the first page of records clicking this button will refresh the current page.

	Displays the page of records after the one on the screen. If you are at the last page of records clicking this button will refresh the current page.
	Displays the last page of records returned by the query. If you are at the last page of records clicking this button will refresh the current page.
	Launches an advanced search function that allows you to search the records by criteria additional to those available on the standard query screen.
	Inserts a new record into the database, if the user has full access to the screen.

Advanced Querying Overview

The Advanced Search feature allows HMMS users perform a search that is more detailed than those available in the typical screen. A simple query in some screens can retrieve a great number of records, so many that searching for a specific one could take a great deal of time. For example, a search in the *Material Functions/Catalog/Product* screen for an item could result in hundreds of items being returned.

The advanced search feature is available on search screens with the advanced search icon in the toolbar.

Performing an Advanced Query

1. Open the screen on which you want to perform an advanced search.
2. Click the icon in the search toolbar. Continuing to click the icon toggles between the standard and advanced search method.

3. In the first box, enter the criteria you want to include in the search. The criteria you see will be specific to the screen in which you are searching.
4. In the second box, enter the value modifier you want to use on the criteria.

=	Use this value modifier if you want the return to be equal to the value entered in the field immediately to the right.

<>	Use if you want the return not to equal the value entered in the field to the right. Example: In the Employee Screen you wanted to find all employees not named “Jim”. Enter this value modifier and “Jim” in the field to the right.
>	Use if you want the return to be greater than the value entered in the field to the right. Example: You want to return all manufacturers’ names that begin with letters and not numbers you would enter this value modifier and “A” in the field to the right.
>=	Use if you want the return to be greater than or equal to the value entered in the field to the right. Example: You want to return all manufacturers’ names that begin with the letters B through Z you would enter this value modifier and “B” in the field to the right.
<	Use if you want the return to be less than the value entered in the field to the right. Example: You want to return all manufacturers’ names that begin with numbers and the letter “A”, use this value modifier and enter “B” in the field to the right.
<=	Use if you want the return to be less than or equal to the value entered in the field to the right. Example, if you want to return all manufacturers’ names that begin with the letters “A” and “B” use this value modifier and enter “B” in the field to the right.
contains	Use if you want the return to include the value entered in the field to the right. Example, if you want to return all manufacturers’ names containing the letters A and C in that order, use this value modifier and enter “AC” in the field to the right.
does not contain	Use if you do not want the return to contain the value entered in the field to the right. Example: if you want to return all manufacturers whose names do not contain the letters A and C in that order, use this value identifier and enter “AC” in the field to the right.
not like	Use this value identifier if you do not want the return to contain the entire value entered in the field to the right. For example, if you want to return all manufacturers whose name is not “Acme”, use this value identifier and enter “Acme” in the field to the right.
	Use this value identifier if you want the return to contain the entire value entered in the field to the right. For

like	example, if you want to return all manufacturers whose name "Acme" but not "Acme & Sons", use this value identifier and enter "Acme" in the field to the right.
null	Use this value identifier if you want the return records in which the data in the field to the left does not exist. For example, if you want to return all records in which no manufacturer is entered select this value identifier. When you do, the field to the right will disappear.
not null	Use this value identifier if you want the return all records in which data in the field to the left exists. For example, if you want to return all records in which a manufacturer is entered select this value identifier. When you do, the field to the right will disappear.

5. Add or delete additional criteria to your list.

Add Button	Click this button to add additional search criteria to the query. You can have as many as five advanced search criteria you can use for any one search.
And/Or Selectors	Allows you to use one or more of the same search criteria. For instance, you can perform a search for records where the manufacturer's CAGE **and** address that are null or for records where the manufacturer's CAGE **or** address are null.
Delete Button	Clicking the button removes the selected line of the search criteria.

6. To quickly determine the number of rows the search will return click on the # icon. The number of rows will be displayed.

7. Click the GO! icon to execute the search. The results of the search will display in the area below the advanced search criteria. If no records get returned, you may have to modify some or all of your search criteria selections.

Search Features of New Screens

In the rewritten screens within HMMS by clicking Search icon, the search pop up box will appear. This popup contains all the searchable fields. You do not need to use a wildcard in this search popup. An example of this is if you type in "1" in the building number field of the popup screen, then click the Search button, the search will return every building that has a "1" in the building number. If there is an exact checkbox Exact next to the field by checking that checkbox the search will return only exact matches to the input data for that field.

Site Map Overview

The Site Map drop down allows you to view all main screens in HMMS on a single drop down that you are authorized to see and then navigate to those screens. The site map is useful when you aren't sure the path to travel to locate a particular screen, or when you aren't certain of the name of the screen you are looking for. In such cases, you can use the site map to browse the screens and make your selection. Click on the screen name to navigate to the screen.

Using the Site Map

Click the Site Map icon to drop the site map down from the banner. To use the Site Map to navigate to a screen, locate the screen name on the site map, and then click on the name. The system will navigate to that screen.

Menu Overview

The Mega Menu allows you to navigate quickly between screens without having to go to the Site Map screen each time. The menu consists of four mega menu tiles; each tile is titled with the applicable module in HMMS. When you click the tiles, a list of the screens you have available to use will appear and is located at the top of the HMMS screen.

Items included in the Menu are the same as what is available on your site map.

Using the Menu

1. Click on the Menu Tile to see the screens under that menu.

2. Click on the Screen Name you wish to navigate to.

Favorites Menu Overview

The Favorites Menu Tile allows you to navigate quickly between screens without having to go to the Site Map screen each time. The Favorites Menu Tile consists of a dropdown list of the screens you have added to it and is located at the top of the HMMS screen.

Items included in the Favorites Menu are saved on an individual user basis; the Favorites Menu items that display in the drop down list are those the user who is logging in has selected as the screens they use on a re-occurring basis.

Adding a Screen to Your Favorites Menu List

1. Navigate to a screen you want to add to the Favorites Menu using the Site Map. If the screen does not appear on the site map you see you cannot add it to your Favorites Menu. Once the screen appears click on the Add to Favorites icon in the banner.
2. A popup will appear asking for confirmation that you want to bookmark this page. Click the Ok button. This will add the screen to your favorites list.

3. The screen name that you added will be entered into the list in alphabetical order.

Navigating to a Screen Using the Favorites Mega Menu

1. From any screen in HMMS click on the Favorites Mega Menu block at the top of the screen.
2. Select the screen for your Favorites Mega Menu list.

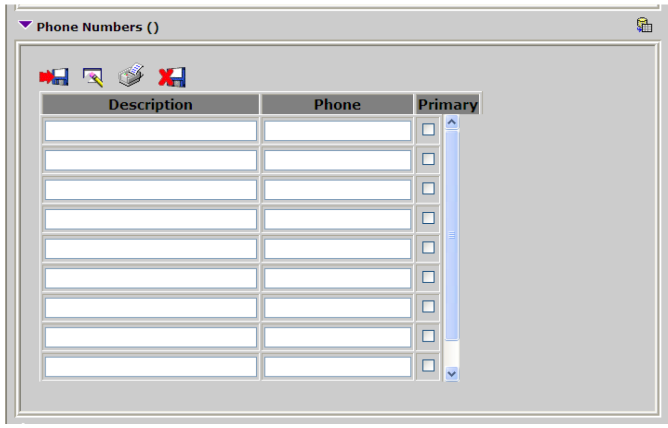
Note: If the screen you are looking for is not on the list, you'll need to add it.

Deleting a Screen from Your Favorites Mega Menu

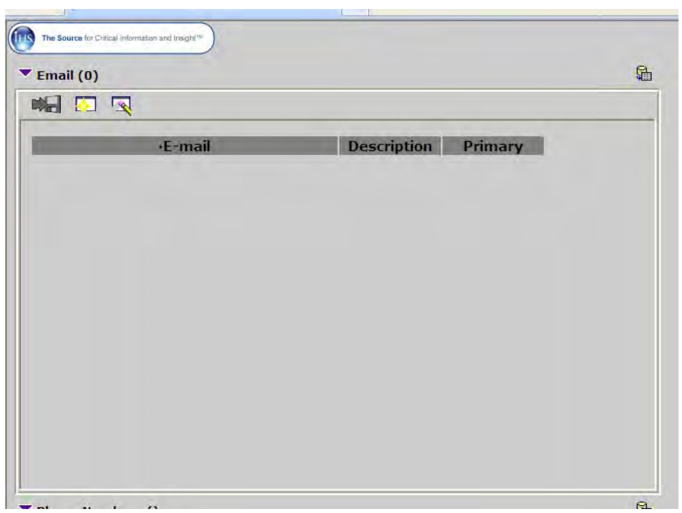
1. Click on the Favorites Mega Menu tile.
2. Click on the Remove  icon. The screen name will be removed from the Favorites Mega Menu list.

Grid Style Child Screen Overview

Screens of this type are used in many HMMS screens. There are two styles of this screen used within HMMS. The first style already has the lines shown for data entry.



The second style does not have any blank lines shown. There is a New Record icon or at the top of the child screen that when clicked will insert a blank line or open a data entry window within the child record.



With these types of child screens you can quickly add, remove, or modify one or many entries in a list of records. Both these type grid screens can be found on the *users* screen.

Adding an Entry to a Grid Style Child Screen

1. Open the child screen in which you want to enter a record.
2. Click in a row without data in it or click the New Record icon or .

3. Enter data in the fields.
4. Click the Save or icon.

Modifying an Entry in a Grid Style Child Screen

1. Open the child screen in which you want to modify a record.
2. Click in the row with the data you want to modify.
3. Make the changes in one or more fields in the row.
4. Click the Save or icon.

Deleting an Entry in a Grid Style Child Screen

1. Open the child screen in which you want to delete a record.
2. Click in the row of the record you want to delete.
3. Click the icon.
4. Click the Save or icon.

Undoing Changes You Made in a Grid Style Child Screen

If you change (add, modify, or delete) a record in a grid child screen you can return to the state of the screen after the record was last saved by clicking the icon. For example, if you open the *Administration/General/Employees Phone Numbers* screen and delete one record, then modify another, you can undo the changes any time before you click the Save or icon

Printing a Record in a Grid Style Child Screen

1. Open the child screen in which you want to print a record.
2. Click in the row of the record you want to print.
3. Click the icon. After you do, the record will display in a new browser window.
4. From the new browser window menu bar select *File/Print*.

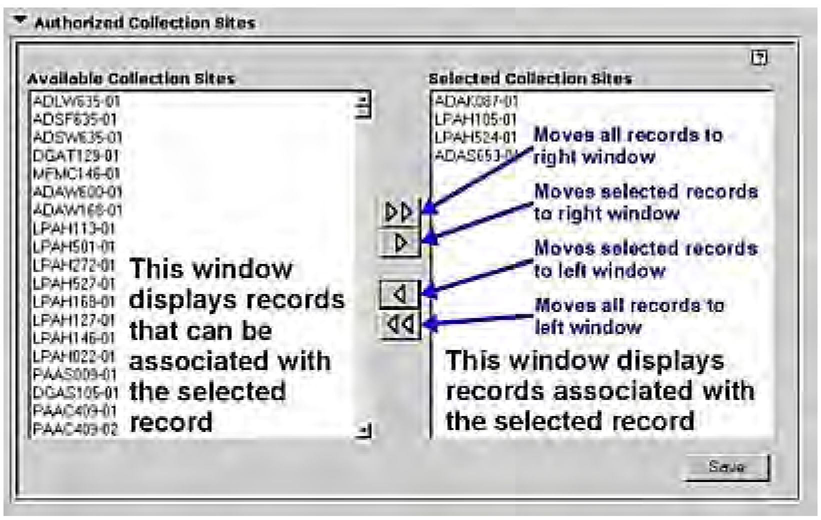
Using Multi-select Style Child Screens

Child screens of this type are used in many HMMS screens. With this type of child screen you can quickly add and/or remove one or many items from a list. For example when setting up in the *Users* screen you can rapidly add the selected person as an authorized member of multiple issue points.

The items in the left-hand field are those from which you can choose. The items in the right-hand field are selected items. For example, if you are in the *Authorized Collection Site* child screen of the *Administration/System/Users* screen the field on the left is a list of all available collection sites. The field on the right is the list of collection sites to which the selected user is assigned.

Using a Multi-select Screens

1. Open the multi-select child screen. It will resemble this example:



2. To move all the items from one field to the other click the ▷▷ or ◁◁ buttons. To move some of the items from one field to the other, go to Step 3.
3. Select the items you want to move from one field to the other:
    a. Click on a single item
    b. Select a range of items by clicking on the topmost item, then clicking on the bottommost item with the **Shift** key pressed.
    c. Select multiple items by clicking on the first item, then click on additional items with the **Ctrl** key pressed.
4. Move the items to the other column. Click the ◁ or the ▷ buttons to move the selected items from one column to the other.
5. Click the Save or icon.

Icons and Their Functions

Icons are used throughout HMMS to make running the software easier. In most cases icons have the identical function, no matter what screen you are in.

Icon Definitions

Executes the selected query.	Return to the previous screen.
Opens a new record.	Displays a list of values for the selected field.
Click to edit the current record.	Displays a list of values for the selected field. Different than the one above in that you can enter freeform text in this type.
Click to delete the selected record.	Displays a calendar with which you can enter a date.
or Click to save the current record. If you exit a screen without clicking this icon the changes you may have made will not be saved.	When querying, click to display the first page of returns for the query. When in multi-select child screens, moves the selected records from the right window to the left window.
Cancels the changes to the current record. Will not undo changes you have already saved.	When querying, click to display the previous page of returns for the query. When in multi-select child screens, moves the selected records from the left window to the right window.
Displays help for the current screen.	Displays the next page of returns for the query.

	Displays a preview of the selected record. You can then print a hard copy page by selecting File/Print from the browser menu bar.		Displays the last page of returns for the query.
	Print the current page of the selected query.		In multi-select child screens click to move all records from the right window to the left window.
	Prints all of the pages of the selected query.		In multi-select child screens click to move all records from the left window to the right window.
	Refreshes the current screen.		Displays the waste profile for the current record.
	Displays a list of containers associated with the current record.		

Exporting Search Results or Reports

If the screen or report has been redesigned to include the exporting functionality the icons will be located either on the upper left or upper right side of the display.

Exporting to Excel

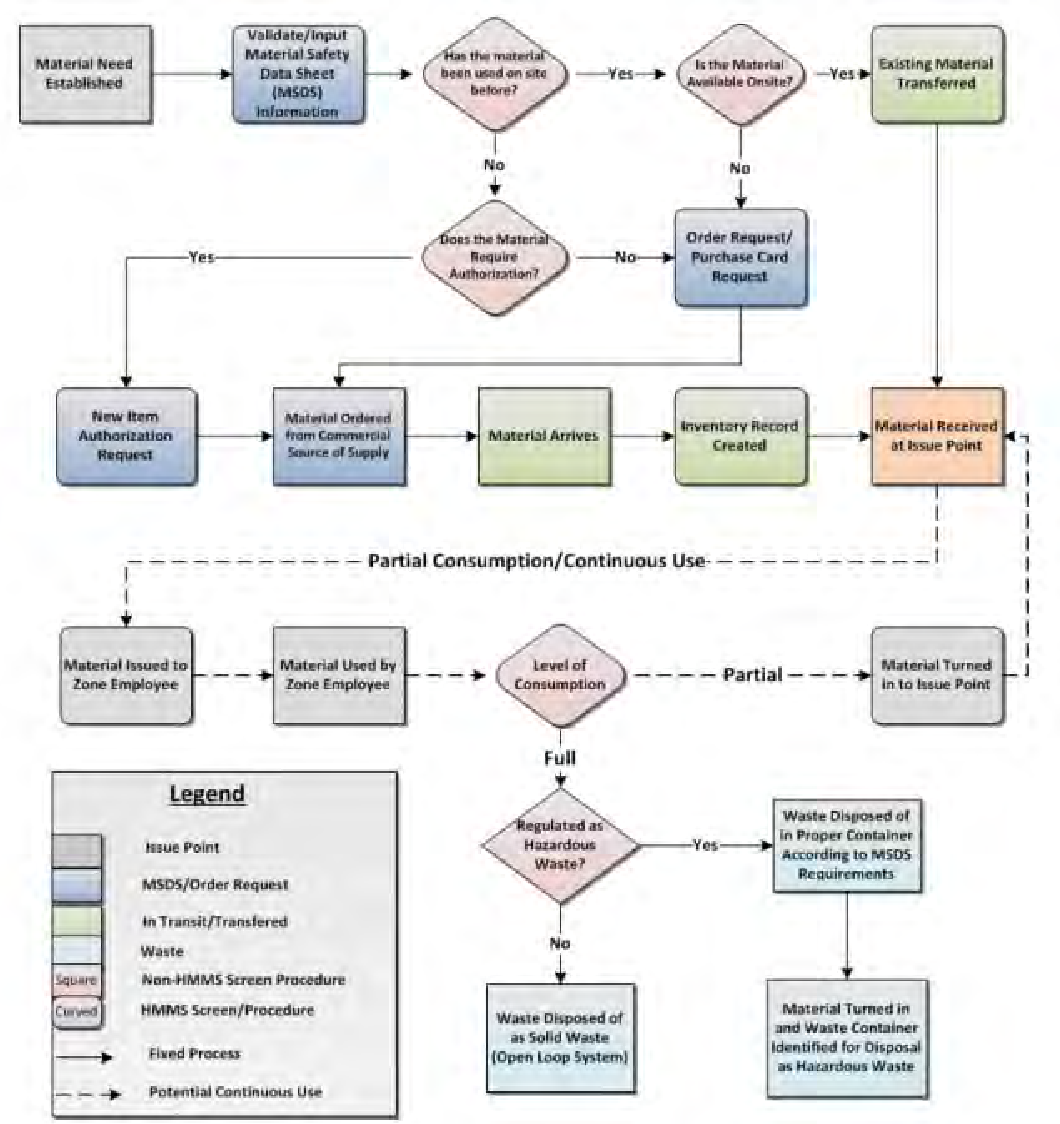
1. Open the applicable screen.
2. Run the applicable search or report.
3. Click on the Export to Excel icon.

Exporting to a PDF

1. Open the applicable screen.
2. Run the applicable search or report.
3. Click on the Export to PDF icon.

Flow of Material through HMMS

The following graphic provides a reference to visualize how HMMS tracks the flow of material through an installation. Starting with the ordering, continuing through the receipt and use of the material, and on to reuse or disposal of the material.



Home Page Tutorial

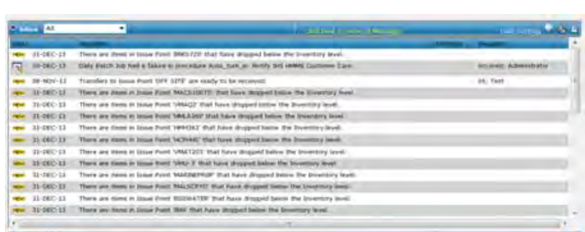
1. In the Banner from left to right is the Day of the week, the date, the week number and the Julian date, the Home Icon, the Breadcrumbs, the user's name, location or site name and the logout button. The icons shown below the date are the User Settings, About, Help, Inbox, Favorites, and Site Map.

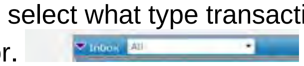
2. The Mega Menu Tiles are used to navigate to the specific area you need.

By clicking on the tile, the menu tile will open.

Then just click on the screen name you need.

3. The messages tasked to the logged in user. Now the inbox displays the first 100 messages. To see all the messages associated with the account click on the "Click here to show all Messages" link.



- These messages are automatically sorted by date.
- The NEW! icon appears in records when the message has not been opened. If a message has been opened but not been acted upon, the icon will not appear but the message will remain. If the message is acted upon it will no longer be displayed in the list.
- Click on the record to open a screen so you can act on the message. For example, if you click on a message with the description of "Request Waste Containers", the *Container Request* screen will open so you can perform your functions in that screen. After saving the changes you made to the screen the message will disappear from your Inbox screen.
- In the heading of the Inbox is a drop down list of values. You use this drop down list to select what type transaction you would like to see the messages for. 

- Click the Refresh icon to refresh the screen to ensure you can see all the messages assigned to you. The screen is automatically refreshed every few minutes, but you can click this icon to refresh the screen manually.
- Click the Help icon to open a new screen with help for the *Inbox* screen.

4. User settings 

gives you an opportunity to change your configuration, everything from the manner in which HMMS displays on the screen to email addresses.
5. The Magnifying Glass icon will start a search for a specific item in the inbox.
6. Message Center provides a way to send and receive messages to other HMMS users in your system.

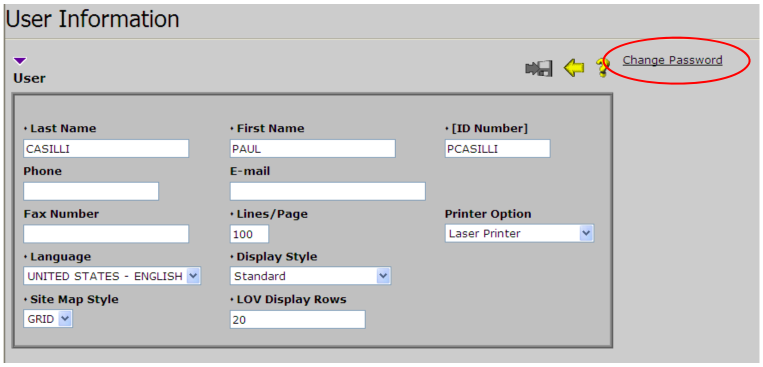
Customizing Your Home Page Overview

The HMMS *Home* page *User Settings/User Information* is where you customize your page settings. From this screen you can select the printer to be used by the HMMS application. Remember to insure all required fields have information. The administrator might not have set the Lines per Page and the LOV Display Rows.

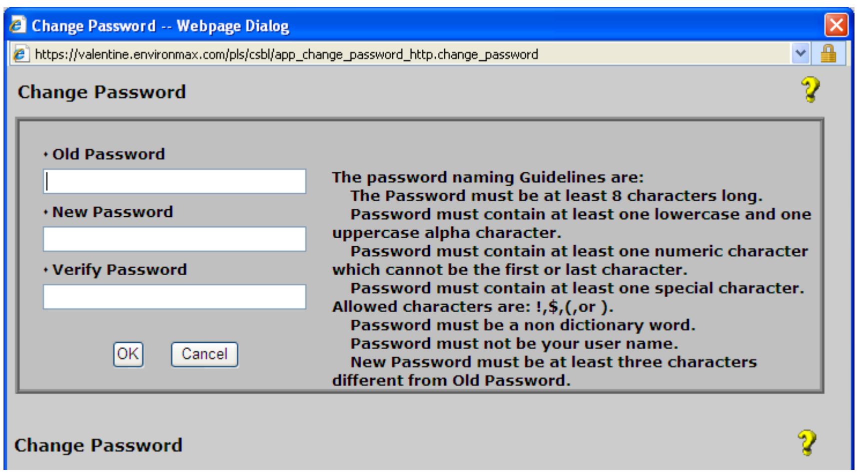
The *User Information* screen also contains three child grid type screens, *Email, Phone Numbers* and *Addresses* these screens allow you to build a personal list contacts.

Changing Your Password

If you receive a pop-up message that your password has expired, once you click on the OK button the user information screen will appear.



Click on the *Change Password* link on the upper right hand side of the screen.



The change password window will open, in the Old Password field type in your old password. You will type your new password in the next two fields. Remember to follow the guidelines shown on the right side of the window. When complete click the OK button. There will be one of three pop-up messages that appear: Password Changed, Password change failed, or the new and verify password fields do not match. All three messages have an OK button that will be clicked. The first two messages will return you to the user preference page, the third message will close and the Change Password window will remain, just retype both passwords and click okay again. If you get the Password Change Failed message, once you are returned to the user preference screen, click the Change Password link again.

Inbox Screen Overview

The *Inbox* child screen is used to view and respond to all of the requests and other functions such as requests to pick up a container, deliver a container that have been assigned to you or your group. For more information on how requests are distributed, see Understanding Workflows.

When a request is selected from the Inbox, the request is displayed and you can review it as necessary. Once your review of the request is complete and you have approved, denied or acted on it, the activity is removed from your inbox and appears in the next user's inbox along with information on the input you had in the process.

Acting on an Inbox Item

1. With the *Inbox* screen open, click on the Inbox item on which you want to act.
2. The appropriate screen will open; that is if the Inbox item on which you are acting is a request to deliver waste containers, the *Waste Functions/Environmental/Deliver Containers* screen will open.
3. Use the screen was you would ordinarily. After you finish with it, close the browser window.

Message Center Overview

The *Message Center* is used to send messages from person to person, person to group, or person to all other users of HMMS at the facility. Examples of these kind of messages are announcements of meetings, new policy announcements, or one-on-one discussions regarding a specific issue.

With this screen users can read, send, and delete messages.

Reading a Message

1. Open the *Message Center* screen.
2. Click on the date of the message. This will open the message.
3. After reading the message you may choose to print it by clicking on the  or delete it by clicking the  icon.

Sending a Message

1. Open the *Message Center* screen
2. Click the  icon.
3. Select the appropriate information in the *Priority* and *Send To* fields.
4. Type in the subject of the message in the *Subject* field.

5. Type in the message in the large field at the bottom of the screen. You can also use a word possessor of your choice and cut and paste the message into the fields.
6. Click the  icon to send the message.

Deleting a Message

1. Open the *Message Center* screen.
2. Click on the date of the message you want to delete. This will open the message.
3. Click the  icon.

MATERIAL CATALOG FUNCTIONS

Manufacturer Screen Overview

The *Material Functions/Catalog/Manufacturer* screen is used to enter information regarding the manufacturer of inventory items. This information includes the name, address, contact information, and CAGE information.

Manufacturer names entered in this screen are available in other HMMS screens.

Prerequisites: None

Dependencies: None

Entering a Product Manufacturer

1. Open the *Material Functions/Catalog/Manufacturer* screen.
2. Click the New icon.
3. Enter the data in the following fields:
    a. *+CAGE* – a code assigned to the manufacturer by DLA.
    b. *+Manufacturer Name* – name of the company producing the material.
    c. *+City* – city in which the company is located.
    d. *+Country* – country the company is located.
4. The following fields are optional but will add valuable information to identify the manufacture:
    a. *Address* – address where the company is located.
    b. *State/Province* – state in which the company is located.
    c. *Zip Code* – mailing zip code
    d. *Emergency Phone* – contact number in case of an emergency
    e. *Phone* – information contact number.
5. Click the Save icon.
6. The *Maintain Product Manufacturer* screen will appear.

Modifying a Product Manufacturer

1. Open the *Material Functions/Catalog/Manufacturer* screen.
2. Query to find the manufacturer record you want to modify.
3. Click on the Edit icon beside the record you want to modify.
4. Make the changes to the fields as necessary.
5. Click the Save icon.

Deleting a Product Manufacturer Record

1. Open the *Material Functions/Catalog/Manufacturer* screen.
2. Click on the Delete icon beside the record you want to remove.

   Note: If there are any products in the database associated with the manufacture you cannot delete the record.

3. Click the **Yes** button on the confirmation message.

Product Group Screen Overview

The *Material Functions/Catalog/Product Group* screen is used to assign group codes to similar products. For example, several different kinds of paint may be joined together using one group code. After the group codes are established different kinds of paint may be assigned to the same group code in the *Material Functions/Catalog/Product-MSDS* screen, entering a Product/MSDS.

This grouping is done on a site-defined level and it is each site's decision as to how to group the items at their site.

This screen is used to virtually group similar products. There are a number of ways you can group products.

Grouping

1. **High-level grouping:** You could, for example, list all weights of motor oil using this method. You might also use this screen to group products by FSC (Federal Stock Class).
2. **Descriptive grouping:** List all 10w40 oils, from all manufacturers with this method. Alternatively, you could list for example all gray primer from a particular manufacturer with the same code, no matter what size container it comes in.

3. **Detailed grouping:** Since the field will accept up to 30 characters, you can use it to group products in great detail. The first four characters could designate the manufacturer, the next four a logical subset of products such as oil, paint, herbicide, etc. Greater detail could be added with additional characters used to designate size of container, color, or any other discriminating factor you choose.

Prerequisites: None

Dependencies: None

Entering a Product Group

1. Open the *Material Functions/Catalog/Product Groups* screen.
2. Click the New icon.
3. Enter the following fields:
   a. *+Group Code* – site defined code for the group of products.
   b. *+Description* – additional information to identify the group and the products contained in the group.
   c. *Sled Exempt checkbox (Optional)* – Indicates that the group is shelf life exempt.
4. Click the Save icon.

Modifying a Product Group

1. Open the *Material Functions/Catalog/Product Groups* screen.
2. Query to find the record of the material you want to modify.
3. Click on the Edit icon beside the record you want to modify.
4. Make the changes to the fields as necessary. You will not be able to change the group code once the code has been assigned to an item. This ensures accurate historical reporting. You can change the description at will.

   Note: You can change the product group code by taking all the products given a code and assigning them to a different code or codes. When no more products remain assigned to a code, you can change the code, then, if you like, reassign products to it.

5. Click the Save icon.

Deleting a Product Group

1. Open the *Material Functions/Catalog/Product Groups* screen.
2. Query to find the record of the material you want to delete.
3. Click on the Delete icon beside the record you want to remove. If there are products assigned to the group code you cannot delete the code.

   Note: You can change the product group code by taking all the products assigned under a particular code and assigning them to a different code or codes. When no more products remain assigned to that code, you may then change the code. When you have finished changing the code, you can reassign products to it.

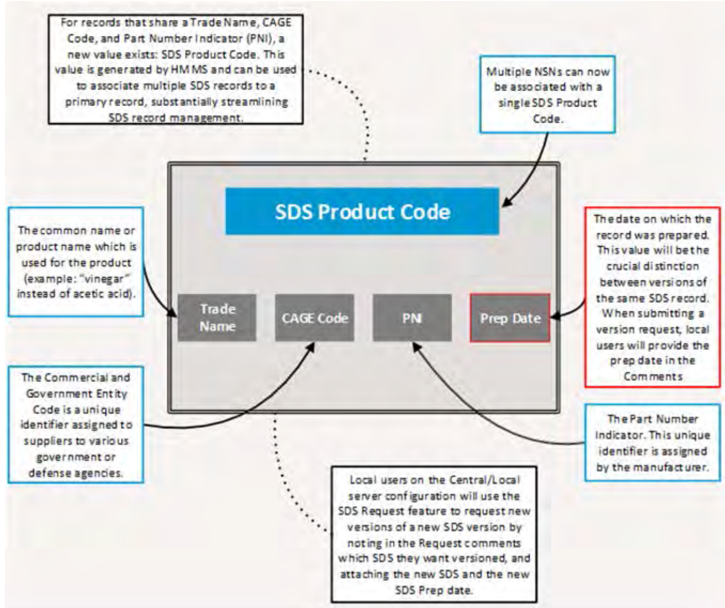
4. Click on the **Yes** button on the confirmation message.

SDS Versioning

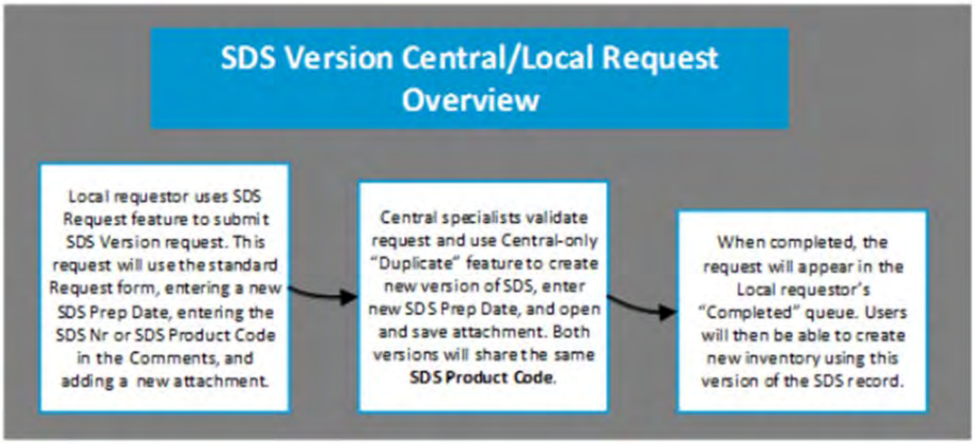
Attention: The versioning functionality introduced in the 4.09.71 General Release is for available for ALL server configurations. However, Local sites configured to operate HMMS using the Central/Local server configuration will use the SDS Request feature to submit New Version requests to Central specialists.

How will the new SDS Versioning functionality operate?

The SDS Versioning functionality revolves around the introduction of a new HMMS-generated value that is tied to a combination of the Trade Name, CAGE Code, and PNI fields: the SDS Product Code.



For Central/Local sites, SDS Versioning functionality will utilize the Request SDS feature and SDS Dashboard introduced in the 4.09.70 release to allow local sites to submit requests to create new versions of existing SDS records. The following diagram describes the process by which Local Requestors will submit New Version requests to Central, and in which Central specialists will take action:



The SDS Versioning functionality includes the following features:

New Version Request

Local users with "Request SDS" privileges will now be able to request a new version of an SDS record using the SDS Request feature.

In order to submit a New Version request, local requestors will navigate to the SDS screen and select the "Create new" option, from which they enter the following information:

- Trade Name
- Manufacturer Name
- Item Name
- New SDS Prep Date in Comments
- SDS Nr or SDS Product Code to be versioned in Comments
- New Attachment
- If applicable, any new container size details

Upon successful save and submission, the request will be forwarded to the Central specialist.

Duplicate/Create New Version

Traditional and Multi-SID

Sites configured to operate HMMS using a Traditional or Multi-SID server configuration will use the "Duplicate SDS" button located on the SDS screen to create new versions of SDS records.

Traditional and Multi-SID users will navigate to the SDS screen, search for the record they wish to version, select the record for editing, and select the "Duplicate" button located in the action pane.

Central/Local

Central specialists will use the new Central-only "Duplicate" feature to create new versions of SDS records in response to New Version requests. Central specialists will then enter the new "SDS Prep Date" and validate the attachment.

ALL

If the record shares the same Trade Name, CAGE code and PNI (the key values of the SDS Product Code), the application will display the following message:

“A record with the same Trade Name, CAGE code and PNI combination already exists. To create a version of this record, use the duplicate function from the SDS you want to version.”

Update

Note: Local sites configured to operate HMMS using the Central/Local server configuration will be required to submit “Update” requests to Central using the SDS Request feature. Traditional and Multi-SID sites can use the update feature as described below.

While the HMMS-generated SDS Product Code value is read-only and cannot be edited, Central specialists will be able to update the Trade Name, CAGE code, and PNI that correspond to a SDS Product Code. The “SDS Prep Date” cannot be edited once a record has been tagged to Local for use.

If any of the constituent values (Trade Name, CAGE code, and/or PNI) that make up a SDS Product Code are altered, and there are no existing, duplicate records, the application will allow the change.

If, however, there are different versions associated to the record, then changes will be made to ALL versions. When the user updates the Trade Name, CAGE Code, or PNI, the application will display a warning message that all versions associated to this SDS Product Code will be updated. The user can then cancel or proceed with the changes.

SDS Product Code Field Added to Screens and Reports

The new SDS Product Code field will appear on the following screens and queries in order to search and filter records:

- SDS (search, update, Dashboard, SDS on the web,)
- Display all Inventory
- Display current Inventory
- New Inventory

- AUL on the Web
- Inventory Label

History of Changes

Users will be able to view a complete record of the changes made to an SDS record by creating an Ad Hoc report. This will allow users to analyze current and past values associated with the SDS record.

In addition, the following historical information will be available:

- Date and Time of record change.
- First and Last Name of user responsible for updating record
- Section/tab and Field/s that changed, including old and new values.

How will HMMS assign SDS Product Codes to existing records?

As part of the 4.09.71 release, a script will be run for ALL sites that will assign SDS Product Code values to each existing SDS record. Upon successfully upgrading to the 4.09.71 release, all non-Local users will be able to duplicate SDS records in order to create new versions and update existing records. Local users with “Request SDS” privileges will be able to use the SDS Request feature to submit requests for new versions of SDS records.

ATTENTION: The script will NOT match or merge SDS records that share Trade Name, CAGE Code, and PNI details.

SDS Screen Overview

The *Material Functions/Catalog/Product/SDS* screen is used to electronically store all the Safety Data Sheets a facility receives from the manufacturer. SDS's (Safety Data Sheets) serve as a guideline for chemical usage, storage, and hazards. This form includes a product formulation page, which supplies the data for calculating and populating material reports such as the Tier II. It also includes a container child record, wherein instead of adding a different SDS for each container size, the user can add container sizes to one SDS or product. Other child records are the Vendor record, Attachments and the Value Added Info tabs.

The content and formatting parameters contained in the SDS are a result of the Occupational Safety and Health Administration's (OSHA) alignment with the Globally Harmonized System of Classification and Labeling of Chemicals (GHS). GHS provides a single set of harmonized criteria for classifying chemicals according to their health and physical hazards and specifies hazard communication elements for labeling and Safety Data Sheets.

Additional Information

HMMS SDS screens are used to:

- Add new SDS information
- Update existing SDS information
- Query for SDS data
- Print SDS data from the system

Prerequisites: Manufacturers and Product Groups must be set up before products can be entered. Chemicals must be entered in the Chemical Information Screen before they can be assigned as ingredients to the product.

Dependencies: None

Note: Only Central and Traditional sites may create SDS records. On the Central/Local model if the user has Create SDS assigned, then they would be able to create an SDS.

Entering a SDS

1. Open the *Material Functions/Catalog/SDS* screen.
2. Click the New Record icon.
3. The *Identification* screen will open.
4. Enter the following fields:
    a. *Product Identification Section*
        a. *Product Identifier/Item Name** – Name of product.
        b. *Other means of Identification/Trade Name** – Trade name of product, could include part numbers.
        c. *SDS Prep Date** – The date the manufacturer's MSDS was prepared.
    b. *Manufacturer Information Section*
        a. *Manufacturer Name** -
        b. *The following will auto populate from the Manufacturer Screen*
            i. *CAGE Code**– Code assigned by DLA to identify the product manufacturer.

ii. *Information Provided by* -*
iii. *Address*
iv. *City**
v. *State*
vi. *Country**
vii. *Postal Code*
viii. *Phone*
ix. *Emergency Phone number**

c. *HMMS Product and Specification*
   a. *Group Code** – Code to identify a group of products
   b. *Mil Spec Nr* – The specification of the material.
   c. *Mil Spec Type* – Further description of the type of material
   d. *Hazard Code* – A code assigned to the product to identify the relative danger of the product.
   e. *CTS Code* – Site defined Chemical Tracking system code.
   f. *+Calc Specific Gravity* – The specific gravity of the product.
   g. *Physical State*
   h. *Restrictions on Use*

d. *Production Container Detail*
   a. *LSN check box* – If the stock number assigned is a locally assigned number.
   b. *FSC – Federal Stock Class*
   c. *NIIN – National Item Identification Number*
   d. *NSN* *– National Stock Number
   e. *Container QTY** – The size of the container, i.e. 1, 12, 16
   f. *UOM** – Container unit of measure, i.e. quart, gallon, fluid ounces, etc.
   g. *Unit Price* - The price of one item
   h. *Shelf Life Code*– The shelf life type code assigned to the NSN.
   i. *PNI** – Part Number Indicator, Part 1 would be “A” part 2 would be “B”.

j. *Manufacturer Part Number* – The part number the manufacturer assigns to a product.

k. *Unit of Issue* – How the material is supplied, i.e. box, drum, bag

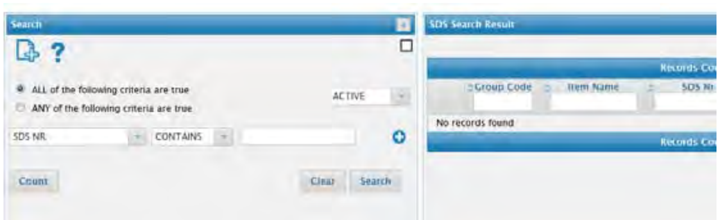
l. *Container Type* – What type container the material is supplied in.

m. *Pressure* – The pressure of the container. The choices are a Blank, Ambient Pressure, Great than Ambient Pressure, Less than Ambient Pressure, and Unknown.

5. Click the Next Button at the bottom of the section one. The application will validate the section. If applicable, highlighting the missing fields and providing user prompts.
6. Repeat the process for Sections 2 -16, the vendors, attachments and value added info sections, clicking the next button until all required and/or available information has been entered.
7. Once all the required information has been entered into all the sections, the application will display a save icon, click the save icon.

Modifying a SDS

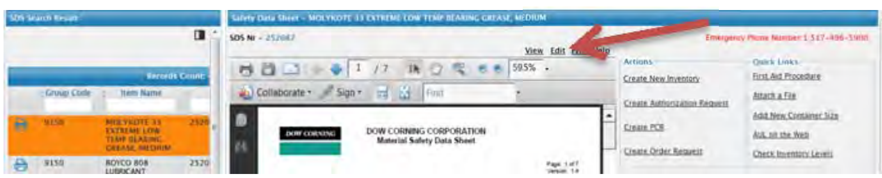
1. Open the *Material Functions/Catalog/SDS* screen.
2. On the left side of the screen is the Search section. Select from the drop down list to display all the records or just the active or inactive records. Select the correct radio button for the search criteria. In the first search criteria column select the field to search, i.e. SDS Number, NSN, or Cage. In the second column select the operator for the search. In the third column type in the value to search for. If necessary, click the add icon to add another search criteria line.



3. Once the search criterion is completely filled out, click the Count Button to retrieve a count of records or click the Search Button to execute the search.
4. On the right side of the screen the records that matched the search criteria will be shown. Click on the record to modify.
5. Make the changes to the fields as necessary. There are some fields you will not be able to change. This ensures accurate historical reporting.
6. Click the Save icon.

Duplicating a SDS

1. Navigate to the *Material Functions/Catalog/SDS* screen.
2. On the left side of the screen is the Search section. Select from the drop down list to display all the records or just the active or inactive records. Select the correct radio button for the search criteria. In the first search criteria column select the field to search, i.e. SDS Number, NSN, or Cage. In the second column select the operator for the search. In the third column type in the value to search for. If necessary, click the add icon to add another search criteria line.
3. Once the search criterion is completely filled out, click the Search Button to execute the search.
4. On the right side of the screen the records that matched the search criteria will be shown. Click on the record to duplicate, the record will show on the right side.
5. Click the Edit link above the view of the SDS.



6. The SDS edit screen appears. Scroll down to the HMMS Product Container Detail section.
7. Click on the “Duplicate” icon at the top of the section.
8. The Duplicate SDS screen appears, this is indicated by the message “Duplication in progress, please complete highlighted fields.” Make the necessary changes to the *SDS Prep Date*, CAGE Code*, NSN*,* and *PNI** fields.
9. Click the Save icon. Depending on the Site Configurations, a pop-up message might appear. Answer the question about inactivating the SDS that was duplicated.
10. Make any other changes to the fields as necessary, ensuring that all fields that need to be changed are changed. In some cases, only the last tab (16: Other) needs to be changed, specifically the *Mfg Revision Date* field. Remember to click the Save icon on each screen that data was changed.

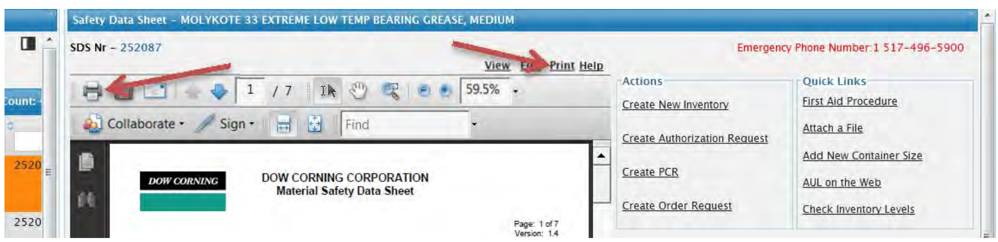
Printing a Product/MSDS

1. Open the *Material Functions/Catalog/SDS* screen.
2. Query to find the record of the material you want to print.
3. On the SDS Search Result screen, click the Print SDS icon. The SDS record will appear in a separate browser window. If there is a Manufacturer’s Provided SDS

attached to the record you will be able to select which one you want to print. The button labeled HMMS SDS Report will print the Database record and the link listed under the file heading will print to Manufacturer's SDS.

OR

4. Click the record on the SDS Search Result Grid to print.
5. The SDS Landing Page appears, click on the printer icon or the Print link above the SDS preview to print the SDS shown.



OR

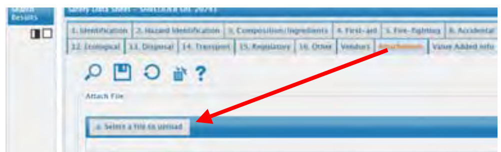
6. Click the view or edit link above the SDS preview. Scroll down the screen to the HMMS Product Container Detail. Click in the check box to select the record to print. Click on the  Print icon. The SDS record will appear in a separate browser window.
7. Select **File/Print** from the browser menu bar. The SDS will print from the current printer.

Attaching a Manufacturers' Provided SDS

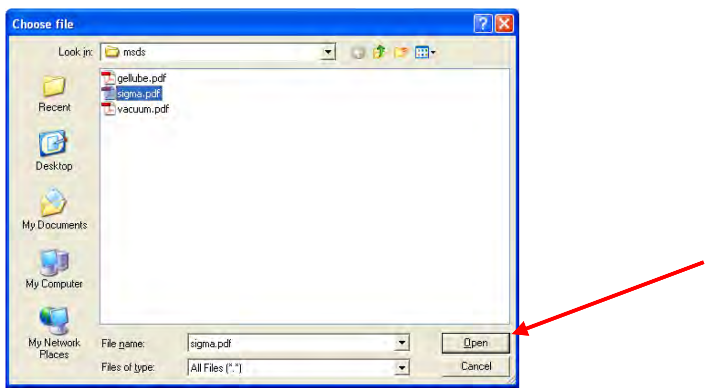
Prerequisites: The Manufacturer's Provided SDS must be in an electronic format.

1. Open the *Material Functions/Catalog/SDS* screen.
2. Query to find the record of the material you want to add the Manufacturer's SDS.
3. Click the on the record to add the Manufacturer's SDS.
4. Click on the Attach a File link under the Quick Links heading.

5. Click on the Select a file to upload button



6. Navigate to the location of the MSDS image.



7. Click on the Open Button.
8. The new Manufacturer's record is attached once the message appears in the attach file section that the record has been successfully uploaded.

Other Functions available on the SDS screen

With the redesign of the screen there are three new useful areas that are shown on the right side of the screen once the record is selected. These areas are the *Actions, Quick Links* and *HMMS Product Information*.

- Actions section: This section contains four links to preform specific functions within HMMS. The functions are:
    - o Create New Inventory
    - o Create Authorization Request
    - o Create PCR (Purchase Card Request)

- Create Order Request
- Quick Links section: This section contains five links to either sections of the SDS or other screens within HMMS. The links are:
  - First Aid Procedures (SDS section 4)
  - Attach a File
  - Add New Container Size
  - AUL on the Web
  - Check Inventory Levels
- HMMS Product Information section: This section contains information concerning the product. The information provided:
  - Used at site indicator - Indicates whether the product is used on site.
  - Ingredients Present indicator - Indicates whether the ingredients are present in the SDS record.
  - Active indicator - Indicates whether the SDS record is active and has inventory created against it.
  - Authorized Zones – The number shown is how many zones can use the material. The number, if clicked will display the list of Authorized Zones.
  - Zone License – Indicates the number of Licenses associated with the product.
  - Items on Hand – Count of inventory on hand
  - Issue point list – Located beside the count, will show the count for a specific Issue Point.
  - Products with the same NSN – Indicates how many other products have the same NSN
  - LBS Used this year – The number of pounds used this year
  - Waste Profile – Indicates how many waste profiles are associated with this product.

Locally Managed SDS Fields

The following SDS fields are now editable at **BOTH** the Central and Local level for sites configured to operate using a Central-Local server configuration.

This will help sites expedite the data entry process while ensuring SDS record data integrity.

Note: **ONLY** sites that are configured to operate using a **Central-Local** server configuration will see changes to SDS screen fields.

SDS Section: Fields Now Manageable at Local Level

Hazard Identification

- Signal word
- Prevention
- Response
- Storage

- Disposal
- Describe hazards not otherwise classified
- Information if mixture contains ingredients with unknown toxicity

Ingredients

- Synonym
- State Pollutant ID
- Impurities and Stabilizing Additives

First Aid

- First Aid measures for inhalation
- First Aid measures for eye contact
- First Aid measures for skin contact
- First Aid measures for ingestion
- First Aid measures for other contact
- Emergency and First Aid Procedures
- Symptoms/Effects Acute
- Symptoms/Effect Delayed
- Indication of immediate medical attention
- Special Treatment needed if/when:
- Additional First Aid Comments

Fire Fighting

- Suitable Extinguishing Media
- Unsuitable Extinguishing Media
- Specific Hazards Arising from material
- Special Protective Equipment and Precautions for Fire Fighters
- Explosion Limits
- Explosion Limits Lower
- Explosion Limits Upper

Accidental Release

- Personal precautions
- Personal protective equipment
- Emergency Procedures
- Methods and Materials for containment and cleanup
- Steps if material is released
- Neutralizing Agent

Handling and Storage

- Precautions for Safe Handling
- Conditions for Safe Storage
- Contact Code
- Other Precautions

Exposure

- Other Exposure Limits
- NIOSH Code
- Recommended Limit
- Appropriate Engineering Controls

- Eye Protection
- Protective Gloves
- Respiratory Protection
- Ventilation
- Other Protective Equipment
- Work Hygienic Plans
- Supplemental Health/Safety Data

Stability and Reactivity

- Reactivity
- Chemical Stability
- Possibility of hazardous reactions
- Conditions to avoid
- Incompatible materials
- Hazardous decomposition products
- Polymerization
- Polymerization Conditions to Avoid

Toxicity

- Acute Toxicity
- Skin Corrosion/Irritation
- Serious Eye Damage/Irritation
- Respirator or Skin Sensitization
- Germ Cell Mutagenicity
- Reproductive Toxicity
- STOT (Specific Target Organ Toxicity) Single Exposure
- STOT (Specific Target Organ Toxicity) Repeated Exposure
- Aspiration Hazard
- Inhalation
- Ingestion
- Skin
- Eye contact
- Symptoms related to the physical, chemical and toxicological characteristics
- Delayed effects
- Immediate effects
- Chronic effects from short-term exposure
- Chronic effects from long-term exposure

Ecological

- Ecotoxicity (aquatic)
- Ecotoxicity (terrestrial)
- Persistence and degradability
- Bioaccumulative potential
- Mobility in soil

Disposal

- Description of waste residues
- Information on safe handling of wastes

- Methods of Disposal (including the disposal of any contaminated packaging)
- Auto Turn In/Disposal Code

Transportation
- UN/NA
- ID Number
- Proper Shipping Name
- Transport hazard class
- Sub Hazard Class 1
- Sub Hazard Class 2
- Packing group
- N.O.S Description 1
- N.O.S Description 2
- ERG Guide Number
- Environmental hazards
- Marine Pollutant
- Transport in bulk (according to Annex II of MARPOL 73/78 and the IBC Code)
- Special transportation precautions

Regulatory
- Applicable Safety, health and environmental regulations
- Temperature Code
- Fire Hazard
- Sudden Release of pressure
- Reactive

About Request SDS

The Request SDS feature is used by local sites operating on a Central/Local server configuration and the Central SDS repository specialists that complete and validate Safety Data Sheet records for use by local sites.

The Request SDS feature allows local sites to request the following:
- Add a new container to an existing SDS record
- Create a new SDS record
- Update an existing SDS record

Request Statuses

The following statuses exist in the SDS Request lifecycle:
- **Submitted**: The request has successfully been submitted and will display in the Central SDS Request Dashboard.
- **In Progress**: The request has been assigned to a specialist.
- **Need More Info**: The specialist requires more information from the local requestor.
- **Completed**: The SDS request has been completed.

- **Closed**: The request has been closed by the specialist.

Request SDS

ATTENTION: The SDS Dashboard and SDS Request Screens are currently only available for sites operating HMMS using a Central/Local server configuration. The Request SDS screen is only available to local sites that receive SDS records from the centralized SDS repository. In order to access this form, users must be assigned the "Create SDS" or "Update SDS" permissions in their User Access Profiles. Only the "Create SDS" permission will enable users to submit requests with locally-entered data.

The Request SDS feature allows local sites configured to operate HMMS using the Central/Local server configuration to enter SDS record details in order to facilitate adding new containers to an existing SDS record, update an existing SDS record, or create a new SDS record.

Screen location: Material > Catalog > SDS

Prerequisites: Manufacturers and Product Groups must be set up before products can be entered. Chemicals must be entered in the Chemical Information Screen before they can be assigned as ingredients to the product.

Dependencies: The Request SDS screen is available only to local sites operating HMMS using the Central/Local server configuration. Users must be assigned "Create SDS" privileges in the User Access Profiles screen to request new SDS records with locally-entered data. If users have only been given "Request SDS" permission, they will only be able to submit a request form to a Central SDS Repository specialist.

Create New SDS Request

Attention: In order for Local users to submit a "Create New SDS" Request with locally-entered data and take action using the record while it undergoing validation, users must be assigned "**Create SDS**" permissions in their User Access Profile. If users are assigned only "**Request SDS**" permissions, will be unable to create new inventory, issue material, receive inventory, or turn-in inventory using the new SDS record **until** it has been completed and validated by a Central specialist.

Local sites operating HMMS using the Central/Local server configuration can submit "Create New SDS" Request by completing the following steps:

1. Navigate to the SDS screen located at Material > Catalog > SDS.
2. Select the "Add New" button ( ).

The application will redirect to the Request SDS Form view.

1. Enter information in the "SDS Product Details section (required fields noted):
    - High Priority - Yes or No. By selecting yes, the application will display before non-high priority requests in the Central SDS Request dashboard.
    - Product Identifier/Item Name - Required. The product identifier/trade name associated with the SDS request.
    - Manufacturer Name - Required. The name of the product manufacturer.
    - Other Means of Identification/Trade Name - If applicable, the trade name or other means of identification associated with the product (example: spray paint).
    - SDS Prep Date - The date on which the Safety Data Sheet was prepared. This date is generally include in the Safety Data Sheet by the manufacturer.
    - Cage Code - Required. The CAGE code identifier of the manufacturer.
    - City - The city in which the product SDS was prepared.
    - Country - The country in which the product SDS was prepared.
    - Emergency Phone Number - The manufacturer emergency phone number
2. Enter your contact information in the "Requestor Information Section":
    - Requestor Email - The email address of the SDS requestor.
    - Requestor Phone - The phone number of the SDS requestor.
    - Comments - Comments made by the SDS requestor with regards to the request.
    - Communication History - Read only. Displays all correspondence between local SDS requestor and central repository specialist.
3. Attach a PDF of the SDS record using the "Attach SDS" feature.
4. Enter information in the "HMMS Product Container Details" section (required fields noted):
    - SDS Number - The Safety Data Sheet number associated with the SDS. This number is generated by HMMS.
    - NSN/LSN - Required. The National Stock Number and/or Local Stock Number associated with the product.
    - Container Size - Required. The container size associated with the product.
    - Unit of Measure - The unit of measure associated with the product container.
    - Manufacturer Part Number - If applicable, the manufacturer part number associated with the product.
    - PNI - Required. The Part Number Indicator of the product.
    - UOI - The Unit of Issue (UOM) associated with the product.
5. Click the "Submit" button.

If successful, the application will display a success message. The "Create New" Request has now been submitted to the Central SDS Repository queue.

Note: Local requestors with "Create SDS" permissions will now be able to enter data into the locally-managed fields locally-managed fields present in various sections of the SDS record, as the SDS record is automatically tagged to local upon submission of the SDS request.

Request SDS Record Update

Attention: In order for Local users to submit a "Update SDS" Request with locally-entered data and immediately begin using the updated record, users must be assigned "**Create SDS**" permissions in their User Access Profile.If users are assigned only "**Request SDS**" permissions, will be unable to create new inventory, issue material, receive inventory, or turn-in inventory using the updated SDS record **until** it has been completed and validated by a Central specialist.

Local sites operating HMMS using the Central/Local server configuration can submit "Add Container to an SDS" Request by completing the following steps:

1. Navigate to the SDS screen located at Material > Catalog > SDS.
2. Perform a search of the SDS record using the following filters and parameters:
    - **ALL** of the following criteria are true - Radio button. Select if you are querying for an exact match.
    - **ANY** of the following criteria are true - Radio button. Select if you are filtering for relevancy.
    - Status Indicator - Active or Inactive. Select the status of the SDS record for which you wish to conduct a search. An "Active" status indicates that the record is in use and may have inventory issued against it.
    - Lookup By - Dropdown. Select the data type for which you wish to search.
    - Operator - Select the operator with which you wish to filter results: Equals, Contains, Starts with, Ends with, Greater than, Less than, Null, Not null, Between, True,   False, Does not Equal.
    - Enter Criteria - Enter the identifier of the selected data type for which you wish to query. This may include all or part of the numerical identifier associated with a record type.
    - Add Row - Select if you want to add another row with another operator, data type and other criteria.
    - Available Actions:
        1. Count - By selecting, the application will display the number of records associated with the criteria selected in the search query.
        2. Clear - By selecting, the application will clear all fields.
        3. Search - By selecting, the application will query the SDS database based on the operator clauses.
3. Select the record for wish you wish to submit an "Update SDS" request by clicking the record hyperlink in the search results table.

The application will redirect to the SDS record view.

4. Select the "Update SDS" Request option.

The application will redirect to the SDS Request Form.

5. Enter your contact information in the "Requestor Information Section":
    - Requestor Email - The email address of the SDS requestor.
    - Requestor Phone - The phone number of the SDS requestor.

- Comments - Comments made by the SDS requestor with regards to the request.
- Communication History - Read only. Displays all correspondence between local SDS requestor and central repository specialist.

6. Scroll down to the "SDS Record Details" section of the SDS Request form. Users can modify the following the fields:
   - High Priority - Yes or No. By selecting yes, the application will display before non-high priority requests in the Central SDS Request dashboard.
   - Product Identifier/Item Name - Required. The product identifier/trade name associated with the SDS request.
   - Manufacturer Name - Required. The name of the product manufacturer.
   - Other Means of Identification/Trade Name - If applicable, the trade name or other means of identification associated with the product (example: spray paint).
   - SDS Prep Date - The date on which the Safety Data Sheet was prepared. This date is generally include in the Safety Data Sheet by the manufacturer.
   - Cage Code - Required. The CAGE code identifier of the manufacturer.
   - City - The city in which the product SDS was prepared.
   - Country - The country in which the product SDS was prepared.
   - Emergency Phone Number - The manufacturer emergency phone number.
7. Click the "Submit" button.

If successful, the application will display a success message. The "Update SDS" Request has now been submitted to the Central SDS Repository queue.

Note: Local requestors with "Create SDS" permissions will now be able to enter data into the locally-managed fields present in various sections of the SDS record, as the SDS record is automatically tagged to local upon submission of the SDS request.

Submit "Add Container to an SDS" Request

Attention: In order for Local users to submit an "Add Container to an SDS" Request with locally-entered data and begin taking action using the updated SDS record, users must be assigned "**Create SDS**" permissions in their User Access Profile.If users are assigned only "**Request SDS**" permissions, will be unable to create new inventory, issue material, receive inventory, or turn-in inventory using the updated SDS record **until** it has been completed and validated by a Central specialist.

Local sites operating HMMS using the Central/Local server configuration can submit "Update Existing SDS" Request by completing the following steps:

1. Navigate to the SDS screen located at Material > Catalog > SDS.
2. Perform a search of the SDS record using the following filters and parameters:

- **ALL** of the following criteria are true - Radio button. Select if you are querying for an exact match.
- **ANY** of the following criteria are true - Radio button. Select if you are filtering for relevancy.
- Status Indicator - Active or Inactive. Select the status of the SDS record for which you wish to conduct a search. An "Active" status indicates that the record is in use and may have inventory issued against it.
- Lookup By - Dropdown. Select the data type for which you wish to search.
- Operator - Select the operator with which you wish to filter results: Equals, Contains, Starts with, Ends with, Greater than, Less than, Null, Not null, Between, True, False, Does not Equal.
- Enter Criteria - Enter the identifier of the selected data type for which you wish to query. This may include all or part of the numerical identifier associated with a record type.
- Add Row - Select if you want to add another row with another operator, data type and other criteria.
- Available Actions:
    1. Count - By selecting, the application will display the number of records associated with the criteria selected in the search query.
    2. Clear - By selecting, the application will clear all fields.
    3. Search - By selecting, the application will query the SDS database based on the operator clauses.

3. Select the record for wish you wish to submit an "Add Container" request by clicking the record hyperlink in the search results table.

The application will redirect to the SDS record view.

4. Select the "Add Container" request button located in the Product Container Detail section of the Identification tab.

The application will redirect to the SDS Request Form.

5. Enter your contact information in the "Requestor Information Section":
    1. Requestor Email - The email address of the SDS requestor.
    2. Requestor Phone - The phone number of the SDS requestor.
    3. Comments - Comments made by the SDS requestor with regards to the request.
    4. Communication History - Read only. Displays all correspondence between local SDS requestor and central repository specialist.
6. Scroll down to the "HMMS Product Container Detail" section of the SDS Request form.
7. If adding one or more additional containers, select the "add container" button and enter the following information where applicable:
    - SDS Number - The Safety Data Sheet number associated with the SDS. This number is generated by HMMS.

- NSN/LSN - Required. The National Stock Number and/or Local Stock Number associated with the product.
- Container Size - Required. The container size associated with the product.
- Container Type - The type of container in which the product is stored.
- Unit of Measure - The unit of measure associated with the product container.
- Manufacturer Part Number - If applicable, the manufacturer part number associated with the product.
- PNI - Required. The Part Number Indicator of the product.
- UOI - The Unit of Issue (UOM) associated with the product.

8. If modifying an existing Product Container Detail record, select the record and update as needed.
9. Click the "Submit" button.

If successful, the application will display a success message. The "Update SDS" Request has now been submitted to the Central SDS Repository queue.

Note: Local requestors with "Create SDS" permissions will now be able to enter data into the locally-managed fields present in various sections of the SDS record, as the SDS record is automatically tagged to local upon submission of the SDS request.

SDS Request Dashboard

ATTENTION: The SDS Dashboard and SDS Request Screens are currently only available for sites operating HMMS using a Central/Local server configuration. The SDS Central Dashboard is only available to specialists managing the centralized SDS repository, while the SDS Request Dashboard is available for local users with access privileges.

The SDS Dashboard is used by local users to view and manage SDS requests. Local sites will be able to enter details for requests to add containers to an SDS record, update an existing SDS record, or create a new SDS record.

After a request is submitted by local sites, central SDS repository specialists will use the SDS Request Dashboard to manage and sort SDS requests and take action on SDS records.

Screen location: Material > Catalog > SDS Request Dashboard

Prerequisites: Manufacturers and Product Groups must be set up before products can be entered. Chemicals must be entered in the Chemical Information Screen before they can be assigned as ingredients to the product.

Dependencies: The SDS Request Dashboard is available only to central SDS repository specialists and authorized Local users.

The SDS Request Dashboard contains two different views: one for local requestors, and one for Central SDS Repository specialists.

Central View

New Requests Tab

This tab contains all of the requests (and associated record counts) from all the local sites SDS requests (record does not yet exist) as well as the SDS Update Request where the record does exist and the local site is requesting an update/edit to be made.

1. Request Type - The type of action being requested by the local user. Options include: Add Container, Create SDS, Update SDS
2. Priority - Indicates whether or not the SDS request has been prioritized by local users. Options include:
   - Yes. By selecting, the application will display all priority requests.
   - No. By selecting, the application will display all non-priority requests.
   - All. Default. By selecting the application will display both priority and non-priority requests.
3. Request Nr - The unique numerical identifier associated with the SDS request.
4. Dt Requested - The original date on which the SDS request was made.
5. Item Name - The name of the item associated with the SDS.
6. Status - The current status of the SDS request. Options include:
   - All.
   - Closed.
   - Completed
   - In Progress
   - Info Provided
   - Need More Info
   - New
   - Submitted
7. Specialist - The central SDS repository specialist to which the request has been assigned.
8. Comments - Comments associated with the SDS request. Users may choose to filter by key word or other relevant information.
9. Last Action - The last action performed on an SDS request.
10. **Actions available:**
    - Clear Filter - By selecting, the application will clear all filters currently in use.
    - Refresh Data - By selecting, the application will refresh data and, if applicable, populate the queue with new requests

In Process Tab

This tab contains all "Create New SDS Record" requests submitted by Local sites. This tab is only available to Central SDS Repository specialists.

1. Request Type - The type of action being requested by the local user. Options include: Add Container, Create SDS, Update SDS
2. Priority - Indicates whether or not the SDS request has been prioritized by local users. Options include:
    - Yes. By selecting, the application will display all priority requests.
    - No. By selecting, the application will display all non-priority requests.
    - All. Default. By selecting the application will display both priority and non-priority requests.
3. Request Nr - The unique numerical identifier associated with the SDS request.
4. Dt Requested - The original date on which the SDS request was made.
5. Item Name - The name of the item associated with the SDS.
6. Status - The current status of the SDS request. Options include:
    - All.
    - Closed.
    - Completed
    - In Progress
    - Info Provided
    - Need More Info
    - New
    - Submitted
7. Specialist - The central SDS repository specialist to which the request has been assigned.
8. Comments - Comments associated with the SDS request. Users may choose to filter by key word or other relevant information.
9. Last Action - The last action performed on an SDS request.
10. **Actions available:**
    - Clear Filter - By selecting, the application will clear all filters currently in use.
    - Refresh Data - By selecting, the application will refresh data and, if applicable, populate the queue with new requests

Ready for QA Tab

The 'Ready for QA' tab contains all records that have been updated and/or completed and are ready for validation by QA. This tab is only available to Central SDS Repository specialists.

1. Request Type - The type of action being requested by the local user. Options include: Add Container, Create SDS, Update SDS

2. Priority - Indicates whether or not the SDS request has been prioritized by local users. Options include:
    - Yes. By selecting, the application will display all priority requests.
    - No. By selecting, the application will display all non-priority requests.
    - All. Default. By selecting the application will display both priority and non-priority requests.
3. Request Nr - The unique numerical identifier associated with the SDS request.
4. Dt Requested - The original date on which the SDS request was made.
5. Item Name - The name of the item associated with the SDS.
6. Status - The current status of the SDS request. Options include:
    - All.
    - Closed.
    - Completed
    - In Progress
    - Info Provided
    - Need More Info
    - New
    - Submitted
7. Specialist - The central SDS repository specialist to which the request has been assigned.
8. Comments - Comments associated with the SDS request. Users may choose to filter by key word or other relevant information.
9. Last Action - The last action performed on an SDS request.
10. **Actions available:**
    - Clear Filter - By selecting, the application will clear all filters currently in use.
    - Refresh Data - By selecting, the application will refresh data and, if applicable, populate the queue with new requests

Local View

All Tab

The ‘All’ contains all requests, both open and closed for the entire installation.

1. Request Type - The type of action being requested by the local user. Options include: Add Container, Create SDS, Update SDS
2. Priority - Indicates whether or not the SDS request has been prioritized by local users. Options include:
    - Yes. By selecting, the application will display all priority requests.
    - No. By selecting, the application will display all non-priority requests.
    - All. Default. By selecting the application will display both priority and non-priority requests.
3. Request Nr - The unique numerical identifier associated with the SDS request.
4. Dt Requested - The original date on which the SDS request was made.

5. Item Name - The name of the item associated with the SDS.
6. Status - The current status of the SDS request. Options include:
    - All.
    - Closed.
    - Completed
    - In Progress
    - Info Provided
    - Need More Info
    - New
    - Submitted
7. Specialist - The central SDS repository specialist to which the request has been assigned.
8. Comments - Comments associated with the SDS request. Users may choose to filter by key word or other relevant information.
9. Last Action - The last action performed on an SDS request.
10. **Actions available:**
    - Clear Filter - By selecting, the application will clear all filters currently in use.
    - Refresh Data - By selecting, the application will refresh data and, if applicable, populate the queue with new requests

My Queue Tab

The My Queue tab contains all records submitted by the local HMMS user logged in. Local requestors will use the ‘My Queue’ tab to view and manage their own initiated/assigned records.

1. Request Type - The type of action being requested by the local user. Options include: Add Container, Create SDS, Update SDS
2. Priority - Indicates whether or not the SDS request has been prioritized by local users. Options include:
    - Yes. By selecting, the application will display all priority requests.
    - No. By selecting, the application will display all non-priority requests.
    - All. Default. By selecting the application will display both priority and non-priority requests.
3. Request Nr - The unique numerical identifier associated with the SDS request.
4. Dt Requested - The original date on which the SDS request was made.
5. Item Name - The name of the item associated with the SDS.
6. Status - The current status of the SDS request. Options include:
    - All.
    - Closed.
    - Completed
    - In Progress

- Info Provided
- Need More Info
- New
- Submitted

7. Specialist - The central SDS repository specialist to which the request has been assigned.
8. Comments - Comments associated with the SDS request. Users may choose to filter by key word or other relevant information.
9. Last Action - The last action performed on an SDS request.
10. **Actions available:**
    - Clear Filter - By selecting, the application will clear all filters currently in use.
    - Refresh Data - By selecting, the application will refresh data and, if applicable, populate the queue with new requests

Chemical Lists Screen Overview

The *Material Functions/Catalog/Chemical Lists* screen is used to enter and review information regarding lists of chemicals. These lists are supplied by the United States Environmental Protection Agency and other regulatory agencies and are regularly and automatically updated in HMMS. This screen also allows you to enter your own lists.

While you can create, modify, and delete site-defined lists, no modifications or deletions can be made to the supplied lists.

Prerequisites: None

Dependencies: None

Entering a Chemical List

1. Open the *Material Functions/Catalog/Chemical Lists* screen.
2. Click the new icon.
3. Enter the following fields:
    a. +*Name* – name of chemical list
    b. +*List Code* – site defined identification code for the list.
4. There are 14 optional fields to further identify the list and who controls the list. They are as follows, *USCA, EPCRA Indicator check box, Assistant Administration Office Name, Code, Program Office Name, Code, Primary & Secondary Points of contact, POC Phones, Focus, Legal, Statute Name and Statute Description.* Enter the data as completely as possible.
5. Click the Save icon. After you do, the *List Links* child section will appear.

6. Enter the chemicals that make up the list by clicking on the new icon in the *List Links* child section.

    a. Enter the *CAS Number* by clicking on the LOV icon.

    b. Select the correct *CAS Number* by clicking on the appropriate row of data. The *Chemical Name, Reportable Quantity, Threshold # 1 Planning QTY, and Threshold # 2 Planning QTY* will populate.

7. Repeat step 6 as required.

8. After you are done entering the chemicals to the list, click the Save icon in the child section.

Reviewing Chemical Lists

1. Open the *Material Functions/Catalog/Chemical Lists* screen.
2. Query to find the record of the material you want to review.
3. Click on the Edit icon beside the record you wish to review.
4. Open the *List Links* child section to review the chemicals on the list. You can click the row of the chemical on which you want more details, and then click on the View Details icon in the child section to view the details regarding that chemical.

Modifying a Chemical List

Note: You can only modify a chemical list that is site-defined.

1. Open the *Material Functions/Catalog/Chemical Lists* screen.
2. Query for the chemical list you want to modify.
3. Click the Edit icon beside the record you want to modify.
4. Make the necessary changes to the record, including the *List Links* child section.
5. Click the Save icon.

Deleting a Chemical List

Note: You can only delete a chemical list that is site-defined.

1. Open the *Material Functions/Catalog/Chemical Lists* screen.
2. Query for the chemical list you want to delete.
3. Click the Delete icon beside the record you want to delete.

4. Click the **Yes** button on the confirmation message.

Chemical Information Screen Overview

The *Material Functions/Catalog/Chemical Information* screen is used to find information about chemicals and to enter reportable quantities, threshold planning quantities, as well as state and local usage limits. Using this screen you can also enter other names for the chemical as well as review information about the changing amounts of the chemical stored on site by date as well as amounts of vapor.

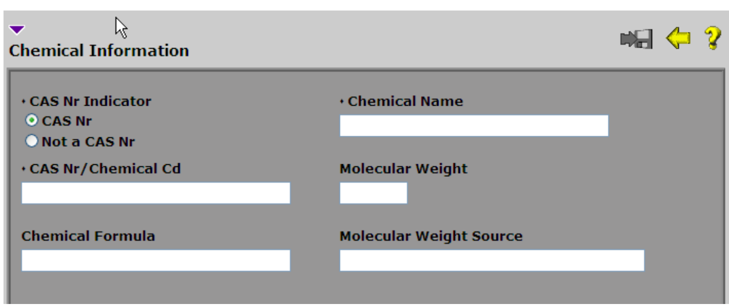
You can modify or delete only those records that are locally entered, and cannot modify or delete chemical records supplied by HMMS.

Prerequisites: None

Dependencies: None

Entering a Chemical Record

1. Open the *Material Functions/Catalog/Chemical Information* screen.
2. Click the New icon.
3. The *Chemical Information* screen appears.
4. Enter the following fields:
   a. *+CAS Nr Indicator* - Select appropriate radio button *CAS Nr or Not a CAS Nr*
   b. *+CAS Number/Chemical Cd*
   c. *+Chemical Name*



5. There are three optional fields, *Chemical Formula, Molecular Weight,* and *Molecular Weight Source*.
6. Click the Save icon.
7. Enter data in the Synonyms child screen, if applicable

a. Click the New icon.

b. Enter the Synonym Chemical Name.

c. Click the Save icon.

8. Enter data in the Vapor Pressure child screen, if applicable

   a. Click the New icon.

   b. Enter the data for the following fields:

      i. Vapor Source

      ii. Vapor Pressure

      iii. Vapor Pressure UOM

      iv. Vapor Temperature

      v. Vpr Temp UOM

   c. Click the Save icon.

9. Enter data in the Applicable Chemical Lists child screen, if applicable.

   a. Click the new icon.

   b. Select the List Code by clicking on the LOV icon, then clicking on the applicable list code. The data will for the rest of the record will auto-populate.

   c. Click the Save icon.

10. The other three child records, High Water Mark, Site Storage Levels and Emissions Calculations are populated by the system.

11. If required, click on the *Reporting, Planning, and Usage* link under the *Pages* heading. Populate the data for the following fields:

    a. *Reportable Quantity* – established level that if exceeded usage must be reported

    b. *Threshold # 1 Planning Qty* – state established upper level of material usage. Used for tier reporting.

    c. *Threshold # 2 Planning Qty* – state established level in which usage does not have to be reported.

    d. *State Usage Limit* – state established storage level that must be reported

    e. *Local Usage Limit* – local government established storage level that must be reported

f. *IC* – who is responsible to respond in case of an incident

g. *RCRA Code* – the code assigned to the chemical by the EPA

h. *NIOSH* – code assigned to the chemical by the National Institute for Occupational Safety and Health.

i. *EHS Indicator* check box – if checked indicates that the chemical is extremely hazardous.

j. *EPCRA Indicator* check box – if checked indicates that the chemical is EPCRA reportable.

k. *IRIS Indicator* check box – if checked indicates that the chemical is in the EPA IRIS Database.

l. *Ozone Indicator* check box – if checked indicates the chemical is an ozone depleting chemical.

m. *Carcinogen* check box – if checked indicates that the chemical can cause cancer.

n. *Exempt* check box – if checked indicates that the chemical is exempt from reporting.

12. Click the Save icon.

Modifying a Chemical Record

1. Open the *Material Functions/Catalog/Chemical Information* screen.
2. Query to find the record of the material you want to modify.
3. Enter or change the data in the fields to include all pages and child records as completely as possible.

   Note: You will only be able to edit records that were locally entered; that is those records not supplied and updated by HMMS.

4. Click the Save icon as each screen is completed.

Deleting a Chemical Record

1. Open the *Material Functions/Catalog/Chemical Information* screen.
2. Query to find the chemical record you want to delete.
3. Click on the Delete icon beside the record you want to remove.
4. Click the **Yes** button on the confirmation message.

   Note: You will only be able to delete records that were locally entered; that is records not supplied and updated by HMMS.

MATERIAL REQUEST FUNCTIONS

Authorization Request Screen Overview

The *Material Functions/Requests/Authorization Request* screen is used to authorize for purchase a material that has not previously been used at an installation or zone or to reauthorize a material that has had its authorization expire. The result is that certain dangerous chemicals (ODCs, carcinogens, etc.) can be kept off the installation.

Submitting a Request
Once completed and submitted an Authorization Request form is sent to workgroups in the Authorization Request workflow. The various groups in the workflow ensure that if there are safer substitutes, less expensive alternatives, or more environmentally friendly options available, they will be used instead of the requested item. If you attempt to authorize a material that, due to site-defied options such as HAZ Code, does not require authorization, users will have the option of automatically switching to the *Material Functions/Requests/Order Request* screen to submit the request.

Important Notes

If the “This will stop Authorization Requests if the NSN is not loaded in product table” parameter in the *Administration/System/Configuration* screen is set to "Y" (default) a check of the product or group will occur to determine if the requested material is in the MSDS records. If the parameter is set to "N" no check will occur.

Terminating Reentry of Previously Denied Requests
You can configure the screen to automatically stop a request for an item if a denial has previously been issued for the item and zone. For example, zone "A" has previously been denied an item with a product ID of "123". Whenever an HMMS user attempts to enter an authorization request for that zone/product or zone/group combination, they will see an on-screen popup informing them that a request for that zone/product match has previously been denied.

To set up the Authorization Request screen to automatically stop requests for previously denied Zone/NSN combinations:

1. The person who reviewed and denied the authorization request for the NSN/zone combination

must have ensured that the *Allow Requester to Resubmit* field in the approval wizard was not selected.

2. The “If set to Yes, this will prevent the user from entering a new request against a NSN and Zone for which a request has already been previously denied” parameter in the *Administration/System/Site Configuration* screen must be set to "Y".
3. If the “If set to Yes, this will prevent the user from entering a new request against a NSN and Zone for which a request has already been previously denied” parameter is set to "N" (default), users will be able to repeatedly resubmit requests for denied NSN/Zone combinations (see Submitting a Previously Saved or Denied Authorization Request).

Prerequisites: Issue Points and Users must be established.

Dependencies: None

Submitting an Authorization Request

1. Open the *Material Functions/Requests/Authorization Request* screen.
2. Click the New icon.
3. Enter the following fields:
    a. *Issue Point Code* – the location that will control the material.
    b. *Organization* – the organization that will use the material.
    c. *+Zone* – the work center or cost center that will use the material.
    d. *Supply Account Code* – the account that will pay for the material.
    e. *Building* – the building where the material will be used.
    f. *Location* – the location within the building.
    g. *+NSN/LSN* – the stock number of the material.
    h. *Item Name* – the item name of the material.
    i. *Unit of Issue* – the unit in which the material comes, i.e. Box, Bag, Can.
    j. *MilSpec* – the military specification of the material.
    k. *Manufacturer Name* – the name of the manufacturer.
    l. *Address* – the address of the manufacturer
    m. *City* – the city where the manufacturer is located.

   n. *State/Province* – the state where the city is located.
   o. *Country* – the country where the state is located.
   p. *Postal Code* – the zip code for the address.
   q. *Phone* – the contact phone number for the manufacturer
   r. *Cage* – the code assigned to the company by DLA.
   s. *Recommended Suitable Substitute* – if applicable, something else that can be used instead of a more hazardous material.
   t. *+Requestor* – the person requesting the material, not necessarily the person inputting the authorization request.
   u. *Certifying Official* – this is usually the requestor's supervisor.
   v. +Task – how the material will be used.

4. Click the Save icon.
5. The Authorization Request Information screen returns with the following fields populated: *Request Type, Order Type, Request Nr, Status, Entered By, and Request Date*.
6. Click on the *Material Use* page link.
   a. *Deployment* - Select the appropriate response from the drop down list.
   b. *Confined Space check box* – indicates if the material will be used in a confine space.
   c. *Confined Space Permit* check box – indicates if there is an approved confined space permit.
   d. Click the Save icon.
7. Click on the *Engineering/Administrative Controls* page link. Fill out the following fields:
   a. *New Process Ind* check box – indicates this is a new process.
   b. *Quantity per task* – how much will be required per task.
   c. *UOM* – unit or measure of required material.
   d. *Duration of task* – how long does the task take.
   e. *Frequency of Task* – how often is the task to be done.
   f. *Monthly Requirement* – how much material will be needed monthly?
   g. *Eye Protection (Goggles)* – what type eye protection?
   h. *Face Protection (Shield)* – is one required?

i. *Hand Protection (Gloves)* – what type gloves?

j. *Arm Protection (Gauntlets)* – is arm protection required if so what kind?

k. *Body Protection (Coveralls)* – is body protection required?

l. *Respirator (half Face)* – what type respirator and filters?

m. *Respirator (Full Face)* – what type respirator and filters?

n. *Respirator (Air Supplied)* – what type respirator and filters?

o. *Other Personal Protective Equipment* – is there any other equipment required?

8. Click on the *Process Information* page link. Fill out the following fields:

    a. *Process/Material (Enclosed/Isolated)* check box – a check indicates yes.

    b. *Process Automated* check box – a check indicates yes.

    c. *Process Heated* check box – a check indicates yes.

    d. *Local Exhaust/Dilution Ventilation* check box – a check indicates yes.

    e. *Doors/Windows Kept Open* check box – a check indicates yes.

    f. *Used Only Outdoors* check box – a check indicates yes.

    g. *Emergency Eyewash/Shower* check box – a check indicates yes.

    h. *Exposure Time Controlled* check box – a check indicates yes.

    i. *Other Engineering Controls* – enter any other controls to be used.

    j. *Employees Trained in Use of Material* check box – a check indicates yes.

    k. *Disposal Code* – if applicable, select the correct turn in time.

    l. *SARA* – if applicable the Superfund code for the material.

    m. *Haz Class/Storage Code* – if applicable, the hazard class of material.

    n. *Remarks* – any remarks about the use of the material.

9. Click on the *Environmental Certification Data* page link. Fill out the following fields:

    a. *High Volatile Organic Compound (VOC)* check box – a check indicates yes.

    b. *Physical Hazards (Unmixed/Uncured)* check box – a check indicates yes.

    c. *Other Environmental Hazards* check box – a check indicates yes.

    d. *Empty Containers* check box – a check indicates yes.

    e. *Waiver required* check box – a check indicates yes.

    f. *Flash Point* what is the flash point?

    g. *FSC* – Federal Stock Class of the material.

   h. *Chlorofluorocarbons (CFCs)* – does the material contain any?
   i. *Halons* – does the material contain any?
   j. *Other ODS Code* – does the material contain any ODS?
   k. *Source Code* – if applicable, the source code for waste generation.
   l. *WCS Code* – the collection site that will handle the waste generated.

10. Click on the *Additional Information* page link. Fill out the following fields:
    a. *Purchase Card Request?* Check box – indicates that the material will be purchased using a credit card.
    b. *Control Number* – Purchase card control number.
    c. *License Code* – if applicable, the license code that controls the usage of this material.
    d. *End Date* – the end date of the license.
    e. *Price* – the price of one item.
    f. *Extended Price* – the purchase price of all that is needed.
    g. *Completion Date* – the date the authorization request was completed.
    h. *Comments* – any additional comments about the request.
11. In the *Activity Detail* child section is where the user can track the progression of the request after it has been submitted.
12. In the *Previous Request Denial Information* child section is where the user can verify the denial information from previous requests for the same material.
13. Open the *Process Codes* child section to add the process code information.
    a. Click the New icon at the top of the child section.
    b. Select the Process Code by clicking on the List of Values icon. Select the correct process code by clicking on the line you require.
    c. Repeat step b until all applicable process codes have been assigned.
    d. Click on the Save icon at the top of the child section.
14. In the *Ingredients* child section will be the list of ingredients associated with this request.
15. Open the *Disposal Method* child section to add the disposal methods information.
    a. Click the New icon at the top of the child section.

b. Select the *Disposal Method* by clicking on the List of Values icon. Select the correct disposal method code by clicking on the line you require.

c. Input any comments in the *Comments* field.

d. Repeat steps b and c until all applicable disposal methods have been assigned.

e. Click on the Save icon at the top of the child section.

16. Open the *Product/MSDS* child section to add the MSDS information.

    a. Click the New icon at the top of the child section.

    b. Select the *Product/MSDS* by clicking on the List of Values icon. Select the correct MSDS by clicking on the line you require.

    c. Repeat steps b until all applicable data sheets have been assigned.

    d. Click on the Save icon at the top of the child section.

17. Open the *Requiring Documents* child section to add the documentation information.

    a. Click the New icon at the top of the child section.

    b. Input the +*Technical Publication* by either clicking on the List of Values icon or typing in the number. If the LOV is used select the correct publication number by clicking on the line you require.

    c. Input the +*Paragraph Number and +Page Number* from the publication. If there is not a +*Paragraph Number* then input a “N/A” since it is a required field.

    d. If applicable, input the *Revision/Change Number* and *Revision/Change Date* for the publication.

    e. Repeat steps b - d until all applicable publications have been assigned.

    f. Click on the Save icon at the top of the child section.

18. In the *Application Method* child record you must select one application method before the request can be submitted.

    a. Click the New icon at the top of the child section.

    b. Select the *App Method* by clicking on the List of Values icon. Select the correct application method by clicking on the line you require.

c. Repeat steps b until all applicable application methods have been assigned.

d. Click on the Save icon at the top of the child section.

19. Open the *EPA 17 Code* child section to assign EPA 17 listed chemicals.

a. Click the New icon at the top of the child section.

b. Select the *EPA 17 Code* by clicking on the List of Values icon. Select the correct code by clicking on the line you require.

c. Repeat steps b until all applicable application methods have been assigned.

d. Click on the Save icon at the top of the child section.

20. Click the submit link once you complete the form. This will send the request through the approval process.

Submitting a Previously Saved Authorization Request

1. Enter the *Material Functions/Requests/Authorization* screen.

2. Query for the request. Typically, you will query for the *NSN* or *Zone* fields.

3. Click the **SUBMIT** button to submit the request to the groups that will review the request. This will also save the request with any changes you may have made.

NOTE: You can also click the Save icon to save the record without submitting.

Reviewing an Authorization Request

1. There are two ways to open a screen to review an authorization request:

a. From your Inbox (double-click on the notification)

   b. From the *Material Functions/Requests/Authorization Request* screen (query for the request you want to review)

2. Review the authorization request.
3. Complete your work with the request:
   a. Close the Authorization Request screen without saving any changes you may have made.
   b. Click the save icon to save any changes you might have made to the request, then close it for later submittal.
   c. Click the *Submit* link on the right side of the screen under *Functions* to forward to the next workgroup in the workflow.

Reviewing the Status of an Authorization Request

1. Open the *Material Functions/Requests/Authorization Request* screen.
2. Query for the authorization request for which you want to review the status
3. You can find the status of the request in the *Status* column.

   NOTE: If you want to find out where the request is in the approval process, use the *Material Functions/Queries/Display Requests* screen.

Modifying an Authorization Request

The person who initiates an authorization request cannot modify it after it has been submitted. This is enforced to prevent a request being changed in the middle of the approval process. People who are reviewing a request can make some changes to the request before sending it to the next step in the review process.

If you want to modify a denied authorization request and resubmit it, see Submitting a Previously Saved Authorization Request or Resubmitting a Denied Authorization Request.

Querying for Ingredients

1. There are two ways to open an Authorization Request screen to review the ingredients associated with it:
   a. From your Inbox (double-click on the notification)
   b. From the *Material Functions/Requests/Authorization Request* screen (query for the request you want to review)
2. Open the *Ingredients* child screen.

Order Screen Overview

The *Material Functions/Requests/Order* screen is used by issue points to order material from the central receiving issue point. The material will either be filled from existing inventory or ordered.

You can determine if materials ordered with this form must be approved for use in zones at the site. Materials are approved for use in a zone with the *Material Functions/Requests/Authorization Request* screen. For a material to be approved for use in a zone, HMMS checks to see if the NSN of the item is approved for use in the zone for which the material is being ordered:

- If the *Zone is required for order request* parameter in the *Administration/System/Site Configuration* screen is set to "Yes" (the default), then an entry in the *Zone* field in this screen is required, and a check of the Zone/NSN match will occur to determine if the requested material is approved.
- If the parameter is set to "No" and the Zone field is left blank, no check will occur.
- If the parameter is set to "No" and the Zone field is entered, a check of the Zone/NSN match will occur.
- If the *Stop material from being ordered if it is not authorized* parameter in the Administration/System/Site Configuration screen is set to "Yes" (the default), and the zone is not authorized for the material, the request will be stopped.
- If the *Stop material from being ordered if it is not licensed* parameter in the Administration/System/Site Configuration screen is set to "Yes" (the default), and the zone is not licensed for the material, the request will be stopped.

If your site does not use any material checks (Licensing, Haz Codes, etc.) you do not need to authorize materials.

There are two other parameters that pertain to this screen:

- The *Display material on-hand alert when ordering* parameter gives you the choice of displaying an alert to the user when they attempt to order material that is already in stock at their issue point.
- The *Display material on order alert when ordering* parameter gives you the choice of displaying an alert to the user when they attempt to order material that has already been ordered for their issue point.

Prerequisites: None

Dependencies: None

Submitting an Order Request

1. Open the *Material Functions/Requests/Order* screen.
2. Click the New icon.
3. The *New Order Request* screen opens.
4. Enter the following information:
    a. *+Issue Point*
    b. *+Zone*
    c. *+NSN*
    d. *+Quantity* required.
5. Click the Save icon.
6. The *Order Request* form will appear.
7. Fill in the following information
    a. Unit of Issue
    b. CAGE
    c. Job Order, if applicable
    d. Work Order, if applicable
    e. Credit Card, if applicable
    f. Urgency Code
    g. Ship to Location
    h. Comments
    i. Click the Save icon.
8. Click on the *Order Information* link on the right side of the screen.
9. Fill in the following information as applicable:
    a. *+TRIC*
    b. *Delivery Destination*
    c. *Issue Exception Code*
    d. *Activity Cd*
    e. *Organization*

f. *Shop Cd*
g. *Date*
h. *Serial Nr*
i. *Demand Code*
j. *Workorder Number/Ship To*
k. *TEX Code*
l. *Fund*
m. *Distribution*
n. *Project Code*
o. *Priority*
p. *Required Delivery Date*
q. *UJC*
r. *Ser Nr/Misc*
s. *SRD*
t. *Work Unit Code*
u. *Command Code*
v. *JOCAS Nr*

10. Click the Save icon.
11. Click the Submit link under the functions heading on the right side of the page.

Reviewing an Order Request

1. There are two ways to open a screen to review an order request:
   a. From your Inbox (double-click on the notification)
   b. From the *Material Functions/Requests/Order* screen (query for the request you want to review)
2. Complete your work with the request:
   a. Close the Order Request screen without saving any changes you may have made.
   b. Click the save icon to save any changes you might have made to the request, then close it for later submittal.
   c. Click the *Submit* link on the right side of the screen under *Functions* to forward to the next workgroup in the workflow.

Reviewing the Status of an Order Request

1. Open the *Material Functions/Requests/Order Request* screen.
2. Query for the order request for which you want to review the status
3. You can discover the status of the request in the *Status* column.

   NOTE: If you want to find out where the request is in the approval process, use the *Material Functions/Queries/Display Requests* screen.

Deleting an Order Request

You can only delete order requests that are pending. You cannot delete order requests that have been completed, approved, or denied.

1. Open the *Material Functions/Requests/Order Request* screen.
2. Query for the order request you want to delete.
3. Click the Delete icon beside the record of the order request you want to delete.
4. Click the **Yes** button on the confirmation screen.

Purchase Card Screen Overview

The *Material Functions/Requests/Purchase Card Request* screen is used to submit a request for an item to be bought with a government purchase card (credit card). Purchase card requests are typically made when an issue point needs an item immediately, and will use a government purchase card to make the acquisition from a commercial business rather than use the typically more time-consuming ordering process.

You can determine if materials to be purchased with this form must be approved for the zone in which it will be used. Materials are approved for use in a zone with the *Material Functions/Requests/Authorization Request* screen. For a material to be approved for use in a zone, the HMMS software checks to see if the NSN of the item is approved for use in the zone for which the material is being ordered.

- If the "Stop material from being ordered if it is not authorized" parameter in the *Administration/System/Site Configuration* screen is set to Yes (the default), a check of the Zone/NSN match will occur to determine if the requested material is authorized. If the parameter is set to No, a check will not occur.
- If the "Stop Material from being ordered if it is not licensed" parameter in the *Administration/System/Site Configuration* screen is set to Yes (the default), a

check of the Zone/NSN match will occur to determine if the requested material is licensed. If the parameter is set to No, a check will not occur.

A purchase card request can be made for an item that is already approved for use, or for an item that needs to be approved. This allows the purchase card and authorization requests to be run through the approval process simultaneously. If this is the case, the *Authorization Request* field in the *Existing Material Control* block displays the request number by matching the NSN-Zone combination. The user reviewing the request can click the Authorize button to review the authorization request.

Prerequisites: None

Dependencies: None

Submitting a Purchase Card Request

1. Open the *Material Functions/Requests/Purchase Card Request* screen.
2. Click the New icon.
3. The *Purchase Card Request Information* screen opens.
    a. In the *Purchaser* block, enter the following information about the cardholder making the purchase:
    b. *+Cardholder* – name of purchaser.
    c. *Phone Number* – contact number of the purchaser.
    d. *Fax* – fax number for the purchaser.
    e. *+Issue Point Code* – the issue point that will control the material once purchased.
    f. *Organization* – the organization of the purchaser.
    g. *+Zone* – the zone that will be using the material.
4. In the *Material Information* block enter the following information regarding the material being purchased.
    a. *+NSN* – the stock number for the material.
    b. *+Product/MSDS Nr* – the MSDS number for the material.
    c. *Prep Date* – the prep date for the MSDS.
    d. *Item Name* – name of the material
    e. *Part Number* – manufacturer's part number
    f. *Vendor/Supplier* – who you are buying the material from.

g. *Vender Phone* – contact number for the supplier

h. *+Quantity* – how many you need.

i. *+Unit of Issue* – how you are buying it, i.e. box bag, can.

j. *+Unit Cost* – how much one item costs.

k. *+Justification* – why you cannot wait for normal supply channels.

l. The following fields will auto-populate based on the information you supplied:

i. *CTS Description* - site defined Chemical Tracking system code.

ii. *Haz Code* - A code assigned to the product to identify the relative danger of the product.

iii. *Cost* – total cost of purchase, i.e. Quantity x Unit Cost.

5. The fields in the *Existing Controls* block will automatically populate, if applicable.

6. Click the Save icon.

7. The Purchase Card screen appears with the *Request Number, Requester, and Request Date* populated.

8. Click the *Submit link* under the Functions Heading on the right side of the screen. This will start the approval process for the Purchase Card Request.

Reviewing a Purchase Card Request

1. There are two ways to open a screen to review a purchase card request:

a. From your Inbox (double-click on the notification)

b. From the *Material Functions/Requests/Purchase Card Request* screen (query for the request you want to review)

2. Complete your work with the request:

a. Close the Purchase Card Request screen without saving any changes you may have made.

b. Click the save icon to save any changes you might have made to the request, then close it for later submittal.

c. Click the *Submit* link on the right side of the screen under *Functions* to forward to the next workgroup in the workflow.

Reviewing the Status of a Purchase Card Request

1. Open the *Material Functions/Requests/Purchase Card Request* screen.

2. Query for the purchase card request for which you want to review the status

3. You can discover the status of the request in the *Status* column.

Note: If you want to find out where the request is in the approval process, use the *Material Functions/Queries/Display Requests* screen.

Modifying a Purchase Card Request

The person who initiates a purchase card request cannot modify it after it has been submitted. This is enforced to prevent a request being changed in the middle of the approval process. People who are reviewing a request can make some changes to the request before sending it to the next step in the review process.

Deleting a Purchase Card Request

You can only delete purchase card requests that are pending. You cannot delete purchase card requests that have been completed, approved, or denied.

1. Open the *Material Functions/Requests/Purchase Card Request* screen.
2. Query for the purchase card request you want to delete.
3. Click the Delete icon beside the record of the purchase card request you want to delete.
4. Click the **Yes** button on the confirmation screen.

MATERIAL TRANSACTIONS

New Inventory Screen Overview

The *Material Functions/Transactions/New Inventory* screen is used by an operator located in an issue point to enter new inventory into their database. New inventory is defined as any material that has been received and has not yet been entered into the system or assigned a serial number. Sites that receive all new material at one central location, known as "Central Receiving", will have an issue point established for that location.

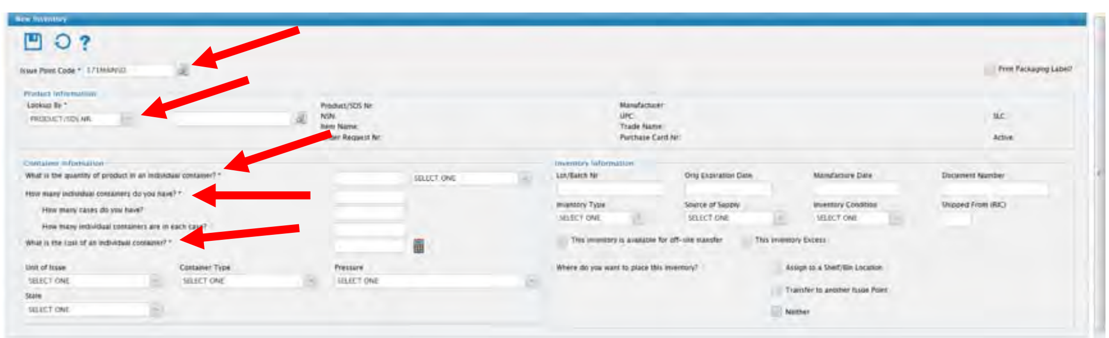
Prerequisites: New material must be created in an Issue Point

Dependencies: SDS/MSDS must be in the database.

Creating New Inventory

1. Open the *Material Functions/Transactions/New Inventory* screen.
2. If the Issue Point is not populated, type in the Issue Point or select it from the  list of values, to which the new inventory is being received.
3. If you want to print a package label, make sure the *Package Label* field is selected.

   Note: There are five required data fields that must be filled-in before you can continue beyond this screen. They are indicated below.



4. Select the criteria for the Lookup by* field, choices are: *Product/SDS Nr, NSN, UPC, Kit Code, Order Request Nr, and Purchase Card Request Nr* – if the information is known, then type the information in, if not select by clicking on the  list of values icon.

a. The *Search results* screen appears. It will be keyed off the Lookup by field. The screen will list the matching information for the Lookup by criteria selected.

b. Select the product by clicking on the line of data.

c. The information for that product is populated into the New Inventory Screen.

d. In the Container Information section, answer the questions:

    i. The quantity of product in an individual container should auto populate.

    ii. Indicate the number of individual containers being created in the next field,

    iii. If applicable, how many cases?

    iv. The items in each case should auto populate.

    v. The following fields should auto populate based on the SDS information:

        1. Cost

        2. Unit of Issue

        3. Container Type

        4. Pressure

        5. State

e. In the Inventory Information section,

    i. Input the *Lot/Batch Number*, ensure that you pay attention to the numbers and letters, “0” and “O” looks very similar. As does the “5” and the “S”. If there are several batches then click the Split link located next to the field name for Lot/Batch. This will bring up a dialog box to input the necessary lot batch information.

    ii. If applicable, input the *Orig Expiration Date,* this will be listed on the container itself.

    iii. If applicable, input the *Manufacture Date*, this will be listed on the container itself.

    iv. If required, input the *Document Number* from the order request.

    v. If applicable, select from the drop down list for the following fields:

        1. Inventory Type

        2. Source of Supply

        3. Inventory Condition

vi. If required, input the Shipped From (RIC) code

vii. If the material is available for off-site transfer check the indicator box.

viii. If the material is excess check the indicator box

ix. Answer the question as to where the material will be placed into inventory by checking the appropriate box. Choices are:

1. Assign to a shelf
2. Transfer to another Issue Point
3. Neither

5. Click the Save icon.
6. The New Inventory Screen will refresh showing the *Inventory Created being* displayed, with the serial numbers of the inventory items (and the case, if applicable) that were generated. Also shown is the Quantity on Hand, Low and High Inventory Levels, and if applicable the Quantity on Order.

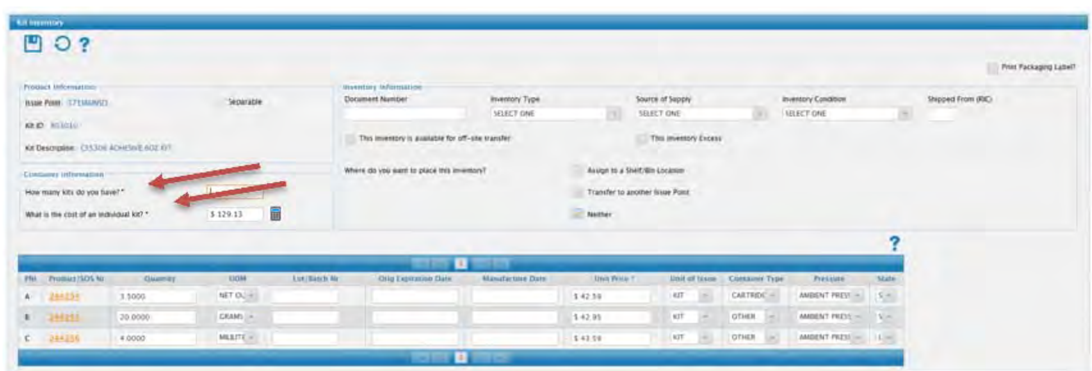
7. There are two functions that can be performed from this screen: Reprint labels and Issue Inventory.
8. A new browser window will open showing the first serial number as a PDF; click the print icon to start printing the labels. Once the labels print, close the screen that the PDF is in.
9. If necessary, the Delete Icon can be used to delete an extra serial numbers. To delete an extra number click in the box on the row that needs to be deleted and click the delete icon.
10. Click the New Icon to navigate back to new inventory screen.

Creating New Kit Inventory

1. Open the *Material Functions/Transactions/New Inventory* screen.
2. Enter the information as previously instructed.

3. Select the *Product/SDS Nr** – if you know the number you can type the information in, if not select by clicking on the list of values icon.
4. If there is a Kit Definition associated with the *Product/SDS** Nr selected the *Create Kit Inventory Confirmation* Dialog Screen will open

5. Select the Kit ID Code by clicking on the line for the kit you are creating.
6. The New Kit Inventory screen will open.
7. There are two required fields on the main screen indicated below:



8. The *Issue Point,* the *Kit ID* and *Kit Description* should auto-populate.
9. In the Container Information section input the *Number of Kits* to create.
10. Make sure that the price of an individual kit is correct. If incorrect change it to the correct price.
11. In the Kit Inventory Detail area the following fields should be auto-populated:

   a. Product/MSDS Nr
   b. Quantity
   c. UOM
   d. Unit Price*
   e. Unit of Issue
   f. Container Type

g. Pressure
h. State

12. Input the following information:
    a. Lot/Batch Number, if applicable.
    b. Orig Expiration Date, if applicable.
    c. Manufacture Date.
13. Click the Save Icon.
14. The New Inventory Screen will refresh showing the *Inventory Created being* displayed, with the serial numbers of the inventory items (and the case, if applicable) that were generated.

15. There are two functions that can be performed from this screen: Reprint labels and Issue Inventory.
16. A new browser window will open showing the first serial number as a PDF; click the print icon to start printing the labels. Once the labels print, close the screen that the PDF is in.
17. If necessary, the Delete Icon can be used to delete an extra serial numbers. To delete an extra number click in the box on the row that needs to be deleted and click the delete icon.
18. Click the New Icon to navigate back to new inventory screen.

Assigning New Inventory to a Shelf/Bin

This series of steps will assign the new material to a shelf-bin within the receiving issue point.

1. Open the *Material Functions/Transactions/New Inventory* screen.
2. Enter the information as previously instructed. Before clicking on the save icon.
3. In the Inventory Information section check the check box “Assign to a Shelf/Bin Location.” Select the shelf-bin to which the material will be assigned in the *Shelf/Bin* field next to that check box.
4. Click the Save icon.

Calculating the Unit Price of New Inventory

This series of steps will help you quickly calculate the unit price of a container that comes as part of a group of other containers (such as in a case).

1. Open the *Material Functions/Transactions/New Inventory* screen.
2. Enter the information as previously instructed. Before clicking on the save icon.
3. Beside the *Unit Price* field click the Calculator icon. After you do, the *Unit Price Calculation* popup will open.
4. In the *Total Price* field enter the total price of the container. Do not enter a dollar sign or other symbol, only the numerical value.
5. In the *Number of Units* field enter the number of individual containers in the larger container.
6. Click the **OK** button. After you do, the *Unit Price Calculator* popup will disappear and the price per unit will appear in the *Unit Price* field.

Simultaneously Creating and Transferring New Inventory

This series of steps will assign the new material to an issue point other than the issue point at which the new inventory is being received.

1. Open the *Material Functions/Transactions/New Inventory* screen.
2. Enter the information as previously instructed. Before clicking on the save icon.
3. In the Inventory Information section, check the check box “Transfer to another Issue Point.” Select the Issue Point to which the material will be assigned in the *Issue Point* field next to that check box.
4. Click the Save icon.

Marking the Newly Created Inventory as Available for Offsite Transfer

This is accomplished to enable the Inventory View and Transfer function to work correctly. By indicating the material will be available for offsite transfer any other HMMS site that you have established a partnership with will be able to see this inventory.

1. Create the Inventory as instructed previously.
2. At the bottom of the Inventory Information section on the left side there is a check box that is labeled This inventory is available for off-site transfer. Click in that box to make the inventory available for transfer to your partnered sites.

Inventory Container Breakdown

The *Material Functions/Transactions/Inventory Container Breakdown* screen allows the breakdown of material from one container into smaller quantities in multiple containers. This causes the status of the original container to change, and allows the system to track the smaller containers in inventory.

- When new material is broken down, it will remain new material.
- New, used, and expired material can be broken down.
- If you enter a serial number that is part of a kit, an alternate screen will appear asking for the breakdown of the individual items of the kit. A kit breakdown also produces breakdown defaults that you can change.

This breakdown method provides a practical way for the resulting inventory items to be easily tracked, stored, issued, and used. Furthermore, breaking down large containers into several smaller containers helps prevent waste, possible contamination of large containers, and employee exposure to large quantities of hazardous material.

Breaking down containers with an Inactive MSDS
If the “Stop Inactive MSDS” configuration option is set to "Yes" you will be unable to breakdown containers with an inactive MSDS. This configuration option is set in the *Administration/System/Site Configuration screen.*

Prerequisites: You must have inventory in the system.

Dependencies: None

Breaking a Container Down Into Smaller Containers

1. Open the *Material Functions/Transactions/Inventory Container Breakdown* screen.
2. In the +*Issue Point Code* field select the issue point in which the container that is to be broken down (original) exists.
3. In the +*Serial Number* field select the serial number of the original container. When you do, the other fields in the *Item Information* block will automatically populate.

   If the *Inventory Kit Breakdown* screen opens, you have attempted to break down a container that is a part of a kit. See next section for more specific instructions on how to break down a kit item that is part of a kit.
4. In the *Breaking Down Above Item Into the Following* block, in the +*Container Qty* field enter the quantity of containers the original container will be broken down into (destination containers), i.e. 8 for 8 fluid ounces or 1 for 1 quart.

5. In the *+UOM* field, select the unit of measure from the drop down list.
6. In the *+Nr of Containers* field, enter the number of destination containers to be created.
7. If the original container will be empty after the destination containers have been filled, click the *Original Container Empty* checkbox.
8. Fill in the information for the following fields, as necessary:
    a. *Container Type*
    b. *Pressure*
    c. *State*
    d. *Shelf/Bin*
9. Click the Save icon at this time. Serial numbers will then be generated for the destination containers.

Breaking Down a Container in a Kit into Smaller Containers

This process will break down one, some, or all of the containers in a kit.

1. Open the *Material Functions/Transactions/Inventory Container Breakdown* screen.
2. In the *+Issue Point Code* field select the issue point in which the container that is to be broken down (original) exists.
3. In the *+Serial Number* field scan or select the serial number of the original container.
4. When you do, the other fields in the *Item Information* block will automatically fill and the *Inventory Kit Breakdown* screen will open. If the *Inventory Kit Breakdown* screen does not open, you are attempting to break down a container that is not part of a kit, see the above instructions.
5. In the *Breakdown Info* child screen change the values in the *New Qty* and *New UOM* fields. If applicable, select the *Orig. Empty* field and change the values in the *Container Type*, *Pressure*, and *State* fields.
6. Repeat step 5 as necessary for each item in the kit.
7. Click the Save icon in the *Breakdown Info* child screen. Serial numbers will then be generated for the destination containers.

Inventory Transfer Screen Overview

The *Material Functions/Transactions/Transfer Material* screen is used to transfer material between issue points. For example, if Issue Point 1 need 5 gallons of paint immediately, and Issue Point 2 has the paint available, Issue Point 2 can transfer that material to Issue Point 1 using this screen.

This function is best used when the issue point needs the inventory immediately, and the usual lines of supply cannot get the material to them on time. In order to replenish its immediate stock shortage, the issue point requiring the material would need to coordinate with other issue points to see if the required material is in stock and available to transfer. This can be done by using the *Material Functions/Queries/Display Inventory* screen.

This form is also used in Central Receiving. When receiving receives the material on the installation, they label the inventory and then transfer it to the issue point where it needs to go to.

Additional Information

- You can transfer one inventory item at a time, or you can transfer a large group of inventory items.
- Only an authorized user for the issue point that contains the needed material can complete a transfer.
- Only issue points that are authorized to receive expired material can receive transfers that include expired material.

Prerequisites: You must have inventory to transfer and there must be an issue point to receive the transfer.

Dependencies: Inventory must be transferred before it can be received.

Transferring Material from One Issue Point to Another

When you transfer one item from a kit, all the items of the kit are automatically marked as transferred.

1. Open the *Material Functions/Transactions/Transfer Material* screen.
2. The logged in user's default issue point record will appear in the *+Transfer From Issue Point* field. If this is not the correct issue point, select the proper issue point.
3. Enter the issue point to which the material will be transferred in the *+Receiving Issue Point* field.
4. Identify the material to be transferred:
    a. Scan or enter the items one at a time in the *Serial Number* field.
    b. In the *Mass Transfers* block enter the beginning and ending serial number of the sequence of consecutive serial numbers you want to transfer.
    c. You can combine both of the above methods to complete the list of items to transfer.
    d. If enabled, material can be transferred by status by selecting the status in the Inventory Status field.

Note: Use caution when selecting to transfer by status. This feature will transfer all inventory in the Issue Point with the status selected.

5. You can open the *Pending Transfers* child section to review the items to be transferred. Click the Save icon on the child section if you change any of the records.
6. Click the Save icon on the *Inventory Transfer* screen to complete the transfer.

Transferring Material to an External HMMS Site

Remember this feature is only available for your site if you have set up inventory sharing partnerships with other sites. This feature is setup in the *Administration/General/Facility* screen. .

1. Open the *Material Functions/Transactions/Transfer Material* screen.
2. The logged in user's default issue point record will appear in the +*Transfer From Issue Point* field. If this is not the correct issue point, select the proper issue point.
3. Enter the issue point OFFSITE_IP in the +*Receiving Issue Point* field.
4. Enter the HMMS Unique ID for the Receiving Issue Point.
5. Identify the material to be transferred:
    a. Scan or enter the items one at a time in the *Serial Number* field.
    b. In the *Mass Transfers* block enter the beginning and ending serial number of the sequence of consecutive serial numbers you want to transfer.
    c. You can combine both of the above methods to complete the list of items to transfer.
    d. If enabled, material can be transferred by status by selecting the status in the Inventory Status field.

    Note: Use caution when selecting to transfer by status. This feature will transfer all inventory in the Issue Point with the status selected.

6. You can open the *Pending Transfers* child section to review the items to be transferred. Click the Save icon on the child section if you change any of the records.
7. Click the Save icon on the *Inventory Transfer* screen to complete the transfer.

Receive Inventory Screen Overview

The *Material Functions/Transactions/Receive Inventory* screen is used to receive inventory at an issue point. After inventory has been transferred, it will have a status of "in transit", and will remain that way until it is received in the Receive Inventory screen. Issue point operators will be alerted to inventory awaiting receipt with a system message informing them that there is material in transit to their issue point.

After inventory has been transferred, it must be received before it is issued out to an employee. The Receive Inventory screen allows for the issue point operator to physically account for the material that has been transferred to the issue point and record that data in the system, assigning it a shelf/bin, if necessary. If inventory has been transferred to your issue point, but is not physically received, a search should be conducted to discover what happened to the missing material. Once an issue point has received material, the material then belongs to that issue point.

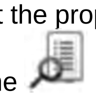
Prerequisites: Inventory must be transferred before it can be received.

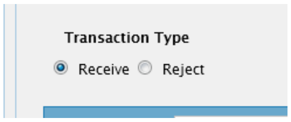
Dependencies: Transferred inventory must be received before it can be issued.

Receiving Inventory from an Internal Source

When you accept one item from a kit, all the items of the kit are automatically marked as accepted.

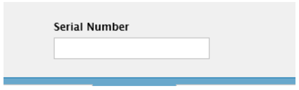
NOTE: Prior to selecting material to receive insure that you have the material physically at the issue point.

1. Open the *Material Functions/Transactions/Receive Material* screen.
2. The logged in user's default issue point record will appear in the *Issue Point Code** field. If this is not the correct receiving issue point, select the proper issue point by either typing it in or select it from the list by clicking on the  Issue Point List of Value icon.
3. Select the Internal Pending Receipts Tab
4. Receive or reject the transfer:
    a. Select either the Receive or Reject radio button. This selection will control if the material being selected on the receive screen is being accepted into the issue point or rejected back to the source.



b. There are three ways to receive or reject some of the items in the transfer.

   i. The first way to use this screen is to type or scan the serial number of the single item into the Serial Number Field.



Then click the Receive button.

   ii. The second way is to type or scan the sequential range of serial numbers into the Inventory Range area.

Then click the Load Button. This will ensure that the serial numbers in the Inventory Range and the Grid area match. Then click the check boxes next to the serial numbers to be received and click the Receive Button on the right top side of the grid. Click on the Yes button on the confirmation message.

   iii. The third way to use the screen is to click the check boxes next to the serial numbers to be received. Then click the Receive button. Click the Yes button on the confirmation message.

c. Remember the above steps are the same for either Receiving or Rejecting material. If rejecting the material, instead of the buttons being labeled Receive, they will be labeled Reject.

5. You can assign the items in the transfer you are accepting to shelf/bins by selecting a shelf/bin in the *Shelf Bin* field either at the top of the screen or in the Grid section.

Receiving Inventory from an External Source

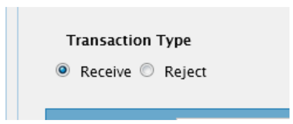
When you accept one item from a kit, all the items of the kit are automatically marked as accepted.

NOTE: Prior to selecting material to receive insure that you have the material physically at the issue point.

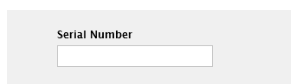
1. Open the *Material Functions/Transactions/Receive Material* screen.
2. The logged in user's default issue point record will appear in the *Issue Point Code** field. If this is not the correct receiving issue point, select the proper issue point by

either typing it in or select it from the list by clicking on the Issue Point List of Value icon.

3. Select the External Pending Receipts Tab.
4. Receive or reject the transfer:
    a. Select either the Receive or Reject radio button. This selection will control if the material being selected on the receive screen is being accepted into the issue point or rejected back to the source.

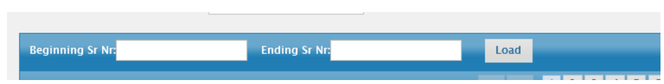


    b. There are three ways to receive or reject some of the items in the transfer.
        i. The first way to use this screen is to type or scan the serial number of the single item into the Serial Number Field.



Then click the Receive button.

        ii. The second way is to type or scan the sequential range of serial numbers into the Inventory Range area.



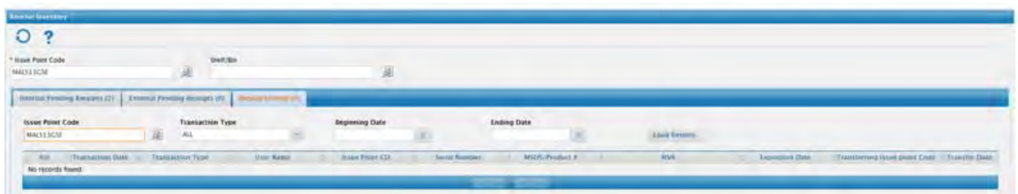
Then click the Load Button. This will ensure that the serial numbers in the Inventory Range and the Grid area match. Then click the check boxes next to the serial numbers to be received and click the Receive Button on the right top side of the grid. Click on the Yes button on the confirmation message.

        iii. The third way to use the screen is to click the check boxes next to the serial numbers to be received. Then click the Receive button. Click the Yes button on the confirmation message.
    c. Remember the above steps are the same for either Receiving or Rejecting material. If rejecting the material, instead of the buttons being labeled Receive, they will be labeled Reject.

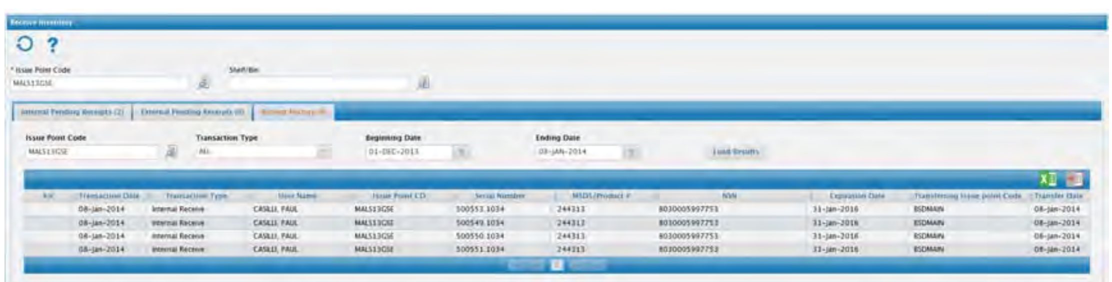
5. You can assign the items in the transfer you are accepting to shelf/bins by selecting a shelf/bin in the *Shelf Bin* field either at the top of the screen or in the Grid section.

Displaying Receive Inventory History

1. Open the *Material Functions/Transactions/Receive Material* screen.
2. The logged in user's default issue point record will appear in the *Issue Point Code** field. If this is not the correct receiving issue point, select the proper issue point by either typing it in or select it from the list by clicking on the Issue Point List of Value icon.
3. Select the Receipt History Tab.



4. Insure the Issue Point Code is correct, if not, select the proper issue point by either typing it in or select it from the list by clicking on the Issue Point List of Value icon.
5. Select the Transaction Type, choices are: All, Internal Receive, Internal Reject, or External Receive.
6. Input the Beginning Date and the Ending Date.
7. Click the Load Results Button. The results for the search criteria will be displayed in the grid below.



Issue Material Screen Overview

The *Material Functions/Transactions/Issue Material* screen is used to issue and track the issue of inventory items to employees. This screen includes data that tracks:

- The issue point that is issuing the material
- The employee to whom the material is issued
- The zone and building where the material will be used
- The process number and job ID for which the material is required
- The serial number of the item(s) being issued
- The outgoing weight or quantity of the item(s)

Prerequisites: There must be inventory to issue.

Dependencies: Employees, building, and zones must be in the system prior to issue.

Issuing Inventory Items with a Scale

1. Open the *Material Functions/Transactions/Issue* screen.
2. The logged in user's default issue point record will appear in the *+Issue Point Code* field. If this is not the correct issue point, select the proper issue point.
3. Place the item to be issued on the scale.
4. With the cursor in the *+Employee Code* field, scan or enter the employee's ID. The *Name*, *Organization* and *Phone* fields will populate with data from the employee record.
5. With the cursor in the *+Zone* field, scan or enter the Zone ID for the zone in which the item being issued will be used. The *Supervisor CD* and *Name* fields will automatically populate.
6. Enter the *Building, and Floor/Room,* if required.
7. Enter the *Job Id*, if necessary.
8. With the cursor in the *+Serial Number* field, scan or enter the serial number of the item being issued, then press the **Print** button on the scale. If you are issuing multiple items, place each on the scale.
    - If you are using a scanner, continue weighing and scanning all the items to be issued.
    - If you are entering the serial numbers manually, you must press the **Enter** key after placing each item on the scale and entering each serial number.
9. If required, enter the *Process Code* to which the material is being issued.
10. If required, enter the *Emission Point Code,* for where the material will be used.
11. If needed, open the *Issue Detail* child section to view the items to be issued to the employee.

12. If needed, open the VOC Calculations child section to view the VOC Information be recorded for this transaction.
13. After all the items have been entered into the record, click the Save icon.
14. If you require a Current Issues report to verify the material being issued to the current employee click the print icon to open the Current Issues Report parameter page.

Issuing Inventory Items without a Scale

1. Open the *Material Functions/Transactions/Issue* screen.
2. The logged in user's default issue point record will appear in the *+Issue Point Code* field. If this is not the correct issue point, select the proper issue point
3. With the cursor in the *+Employee Code* field, scan or enter the employee's ID. The *Name*, *Organization* and *Phone* fields will populate with data from the employee record.
4. With the cursor in the *+Zone* field, scan or enter the Zone ID for the zone in which the item being issued will be used. The *Supervisor Cd* and *Name* fields will automatically populate.
5. Enter the *Building, and Floor/Room,* if required.
6. Enter the *Job Id*, if necessary.
7. With the cursor in the *+Serial Number* field, scan or enter the serial number of the item being issued. The Weight (kilograms) field will populate if your site configuration is set to no scale. If you are issuing multiple items, pause so the weight can populate before entering the serial number of that item.
8. If you are entering the serial numbers manually, you must press the **Enter** key entering each serial number.
9. If required, enter the *Process Code* to which the material is being issued.
10. If required, enter the *Emission Point Code,* for where the material will be used.
11. If needed, open the *Issue Detail* child section to view the items to be issued to the employee.
12. If needed, open the *VOC Calculations* child section to view the VOC Information be recorded for this transaction.
13. After all the items have been entered into the record, click the Save icon.

14. If you require a Current Issues report to verify the material being issued to the current employee click the print icon to open the Current Issues Report parameter page.

Issuing Separable Kits

1. Open the *Material Functions/Transactions/Issue* screen.
2. The logged in user's default issue point record will appear in the +*Issue Point* field. If this is not the correct issue point, select the proper issue point.
3. Place one of the items of the kit on the scale.
4. With the cursor in the +*Employee Code* field, scan or enter the employee's ID. The *Name*, *Organization* and *Phone* fields will populate with data from the employee record.
5. With the cursor in the +*Zone* field, scan or enter the Zone ID for the zone in which the item being issued will be used. The +*Supervisor Cd* and *Name* fields will automatically populate.
6. Enter the *Building, and Floor/Room,* if required.
7. Enter the *Job Id*, if necessary.
8. With the cursor in the +*Serial Number* field:
    a. Scan or enter the serial number of the item being issued
    b. Press the **Print** button on the scale.
    c. Remove the item from the scale
    d. Place the next item from the kit on the scale
    e. Press the **Print** button on the scale.
    f. Repeat these steps until all the items in the kit have been weighed and their serial numbers entered. If you are entering the serial numbers manually, you must press the **Enter** key after placing each item on the scale and entering each serial number.
9. If required, enter the *Process Code* to which the material is being issued.
10. If required, enter the *Emission Point Code,* for where the material will be used.
11. If needed, open the *Issue Detail* child section to view the items to be issued to the employee.
12. If needed, open the *VOC Calculations* child section to view the VOC Information be recorded for this transaction.
13. After all the items have been entered into the record, click the Save icon.

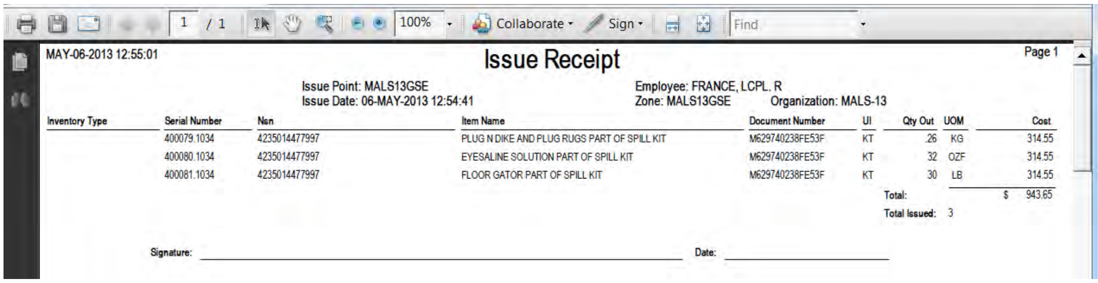
14. If you require a Current Issues report to verify the material being issued to the current employee click the print icon to open the Current Issues Report parameter page.

Issuing Non-separable Kits

1. Open the *Material Functions/Transactions/Issue* screen.
2. The logged in user's default issue point record will appear in the +*Issue Point* field. If this is not the correct issue point, select the proper issue point.
3. Place all of the items of the kit on the scale.
4. With the cursor in the +*Employee Code* field, scan or enter the employee's ID. The *Name*, *Organization* and *Phone* fields will populate with data from the employee record.
5. With the cursor in the +*Zone* field, scan or enter the Zone ID for the zone in which the item being issued will be used. The +*Supervisor Cd* and *Name* fields will automatically populate.
6. Enter the *Building, and Floor/Room,* if required.
7. Enter the *Job Id*, if necessary.
8. With the cursor in the +*Serial Number* field scan or enter the serial number of the item being issued then press the **Print** button on the scale.
9. If required, enter the *Process Code* to which the material is being issued.
10. If required, enter the *Emission Point Code,* for where the material will be used.
11. If needed, open the *Issue Detail* child section to view the items to be issued to the employee.
12. If needed, open the *VOC Calculations* child section to view the VOC Information be recorded for this transaction.
13. After all the items have been entered into the record, click the Save icon.
14. If you require a Current Issues report to verify the material being issued to the current employee click the print icon to open the Current Issues Report parameter page.

Printing Issue Receipts

Complete the issues as listed above, once the issue is complete click on the Print to Receipt Icon. Then the receipt will appear in a new window. Then Click the Printer Icon to print the report.


MAY-06-2013 12:55:01 Issue Receipt Page 1

Issue Point: MALS13GSE Employee: FRANCE, LCPL. R
Issue Date: 06-MAY-2013 12:54:41 Zone: MALS13GSE Organization: MALS-13

Inventory Type	Serial Number	Nsn	Item Name	Document Number	UI	Qty Out	UOM	Cost
	400079.1034	4235014477997	PLUG N DIKE AND PLUG RUGS PART OF SPILL KIT	M629740238FE53F	KT	.26	KG	314.55
	400080.1034	4235014477997	EYESALINE SOLUTION PART OF SPILL KIT	M629740238FE53F	KT	32	OZF	314.55
	400081.1034	4235014477997	FLOOR GATOR PART OF SPILL KIT	M629740238FE53F	KT	30	LB	314.55

Total: $ 943.65
Total Issued: 3

Signature: ______ Date: ______

Overriding Issue Denials

If your site is configured to allow the issue point operator to override denial warnings and issue the material, there will be a pop up message that appears to either confirm or cancel the issue. Either action creates a denial message that is reviewed by management so that they can take the appropriate corrective measures.

If your site is configured to not allow the issue point operator to override denial warnings, there will be a popup message that states the material cannot be issue. The issue point operator will click on the Ok button. The issue screen will remain but the serial number information will be removed. This action creates a denial message that is reviewed by management so that they can take the appropriate corrective measures.

Issue by Range Screen Overview

The *Material Functions/Transactions/Issue by Range* screen is used to track the issue of a range of serial numbered inventory items to employees. The items have to be all the same Product/MSDS number or a range of manufacturer kits, either separable or non-separable kits. This screen can issue a range of cases or kits that are part of a case.

This screen includes data that tracks:

- The issue point that is issuing the material.
- The employee to whom the material is issued.
- The zone and building where the material will be used.
- The process number and job ID for which the material is required.
- The serial number of the item(s) being issued.
- The outgoing weight or quantity of the item(s).

This screen has the following restrictions:

- Cannot is a range of site-defined kits.
- Only matching kits can be issued.
- Cannot mix different kits or kits with single items unless the product numbers match.
- Cannot have different single items that are not part of a kit in queue unless the product numbers match.

Prerequisites: You must have inventory to issue and you must know the start and end of the serial number sequence.

Dependencies: Employees, building, and zones must be in the system prior to issue.

Issuing a Range of Inventory Items

1. Open the *Material Functions/Transactions/Issue by Range* screen.
2. The logged in user's default issue point record will appear in the *+Issue Point Code* field. If this is not the correct issue point, select the proper issue point.
3. Place one of the items to be issued on the scale.
4. With the cursor in the *+Employee Code* field, scan or enter the employee's ID. The *Name*, *Organization* and *Phone* fields will populate with data from the employee record.
5. With the cursor in the *+Zone* field, scan or enter the Zone ID for the zone in which the item being issued will be used. The *Supervisor CD* and *Name* fields will automatically populate. If more than one supervisor is available for the zone, select the correct supervisor from the drop down list.
6. If required, enter the *Building and Floor/Room* where the material will be used.
7. If required, enter the *Job Id*. This allows the material to be tracked to a specific job.
8. With the cursor in the *+Beginning Serial Number* field, scan or enter the first serial number of the item being issued.
9. With the cursor in the *+Ending Serial Number* field, scan or enter the last serial number of the item being issued.

   Note: If only one serial number or one kit is being issued, the Ending Serial Number will default to the Beginning Serial number.
10. If required, enter the *Process Code* for how the material will be used.
11. If required, enter the *Emission Point* for where the material will be used.
12. Click the Add Items button to add these items to the Inventory to be issued queue.

   Note: If required, more material items can be added to the Inventory to be issued queue by repeating steps 8 – 12.

13. When all inventory items have been added to the queue, enter the KGrams Out values, if using a scale, press the ***Print*** button on the scale.
14. After all the items have been entered into the record, click the ***Issue Items*** button.

    Note: Click the Clear Items to clear the Inventory to be Issued queue.

Turn In Screen Overview

The *Material Functions/Transactions/Turn In* screen provide the capability to track the return of items previously issued to employees. This screen is key when tracking and maintaining inventory control of MSDS items for the issue point.

The screen is used in facilities that choose to implement “closed loop” business practices, meaning that materials going out must be accounted for by being returned to an issue point. In this practice, there is an option to use a scale to weigh returned material for accuracy, depending on how tightly a facility wants to control inventory.

The screen allows a site to turn in material that was originally issued at another site. This process is called an off-site turn-in. This is useful when your site is hosting training or an employee returns from training with material that was issued at another site. There are some things that to understand about this process, HMMS does not perform the usual authorization, licensing or chemical checks during this process. The users must use caution when performing an off-site turn-in because the actions can affect both sites’ data.

When material is turned in there are two options in dealing with it:

- If enough of the material remains it can be returned to inventory for future issue.
- It can be put into a waste container or disposed of in accordance with local, state and federal regulations.

If the material being turned in does not have a serial number or the number is illegible see the *Turn In - No Label* screen.

Additional Information

- *Issue Point* - Material cannot be turned into an inactive issue point and these will not be displayed in the LOV on the *Material Turn In* screen.
- Access to the *Turn In* screen is controlled via the *User Access Profiles* screen. If a user is not allowed to turn in material, that user will not be given access to this functionality.

- If the user has a default issue point configured in the *User Preferences* screen, the field will be populated with this issue point.
- System Configuration:
    - o If there are no entries for the user, they can turn in material to ANY issue point, including off-site issue points. (The LOV will not display inactive issue points.)
    - o If there is only one entry, the issue point will automatically populate in the appropriate field. (The LOV will be suppressed.)
    - o If there is more than one entry, the user will be limited to the listed issue points (The LOV will contain only the authorized issue points.)
- The user can scan or enter in a serial number. You are notified with an on-screen message if expired inventory is turned in.
- If "0" is entered into the *kgrams in* or *qty in* fields, the status in is automatically set to EM (Empty Material).
- HMMS tracks each component of a kit individually for safety and reporting purposes, but when one item of a kit is turned in; the remaining items of the kit are automatically turned in with it.
- If the employee using the material returns it to an issue point different than the one where is was issued, a transfer will automatically be performed between the issuing and receiving issue points, minus the amount of material used. The transfer is logged as a transfer by the *Turn In* screen.
- The *Container Number* list of values will only list open waste containers. The LOV will check the issue point the material is being turned in to and see if there are collection sites assigned to this issue point. If there are, the LOV will only show containers in those collection sites. If there are no collection sites tied to the issue point the LOV will list all containers that are open. If material is assigned to a waste container, the inventory status will be changed to WS for waste.

Prerequisites: Material must be issued.

Dependencies: None

Material Turn In With a Scale

1. Open the *Material Functions/Transactions/Turn In* screen.
2. Query for the serial number of the material you wish to turn in.

3. Click the edit icon beside the serial number to be turned in.

OR

4. Click the New icon
5. Scan or enter manually the serial number of the material you wish to turn in.
6. Hit Enter on your keyboard.
7. The Turn In screen appears.
8. Position the cursor in the *Kgrams In* field.
9. Press the **ZERO** button on the scale to zero out the scale before placing the material to be turned in on the scale.
10. Ensure the material to be turned in is sealed in the container (to prevent contaminating the scale) and place the material on the scale.
11. Click the **PRINT** button on the scale to transfer the weight data and record it in the *Turn In* screen.
12. Select the appropriate status in the *+Status In* field.
13. If the material is usable and you are placing back on the shelf, record the shelf location in the *Shelf/Bin* field.
14. Click the Save icon.

Material Turn In Without a Scale

1. Open the *Material Functions/Transactions/Turn In* screen.
2. Query for the serial number of the material you wish to turn in.
3. Click the edit icon beside the serial number to be turned in.

OR

4. Click the New icon
5. Scan or enter manually the serial number of the material you wish to turn in.
6. Hit Enter on your keyboard.
7. The Turn In screen appears.
8. Estimate the quantity of the material and enter it in the *Quantity In* field.
9. Select the appropriate status in the *+Status In* field.
10. If the material is usable and you are placing back on the shelf, record the shelf location in the *Shelf/Bin* field.

11. Click the Save icon.

Material Turn In to a Waste Container

1. Open the *Material Functions/Transactions/Turn In* screen.
2. Query for the serial number of the material you wish to turn in.
3. Click the edit icon beside the serial number to be turned in.

OR

4. Click the New icon
5. Scan or enter manually the serial number of the material you wish to turn in.
6. Hit Enter on your keyboard.
7. The Turn In screen appears.
8. Position the cursor in the *Kgrams In* field, if configured to have scales:
   a. Press the **ZERO** button on the scale to zero out the scale before placing the material to be turned in on the scale.
   b. Ensure the material to be turned in is sealed in the container (to prevent contaminating the scale) and place the material on the scale.
   c. Click the **PRINT** button on the scale to transfer the weight data and record it in the *Turn In* screen.
9. If configured to have no scales estimate the quantity of the material and enter it in the *Quantity In* field.
10. Select the appropriate status in the +*Status In* field.
11. If the material is empty or unusable and you are placing the container into a Waste Container, record the container number in the *Container Number* field, by either typing in the container number or selecting the container from the list of values icon.
12. Click the Save icon.

Turning in Inventory Issued at Another Site

An off-site turn-in starts on the Turn-In Screen as a regular turn in. The following checks are performed to determine if an off-site turn in might be needed:

- The material has a HUID
- There is no record of the material in the current system

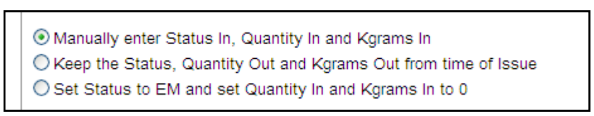
- The current site has an Inventory Sharing Partnership with another site and has the Turn in Offsite Material Service assigned to the partnership.

If all these conditions are met, the system will prompt the user and open the Off-site Turn-In dialog.

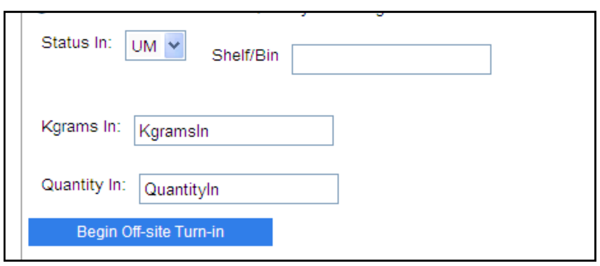
To turn in inventory that was issued at another site:

1. Open the *Material Functions/Transactions/Turn In* screen.
2. Query for the serial number of the material you wish to turn in.
3. The Off-Site Turn-In Dialog opens, the Issue point and Serial Number fields will be populated with the information from the turn in screen. The user can change the Issue Point field.

4. Select the option for performing the off-site turn-in.



5. In the Status In field, enter the status for the material.



6. In the Shelf/Bin field, enter the shelf location for the material, if applicable.
7. Enter either the Kgrams In or the Quantity In.
8. Click the Submit Off-site Turn-In button to start the turn in process.

   Note: Because of the complexity and external dependencies, there could be a time lag while processing the turn-in. The user that initiated the turn in will receive a notification in the inbox when the transaction is complete. If it completed successfully then the message will show the inventory information. If it was unsuccessful then the user will receive a notification with the details of the problem that prevented the transfer.

Multi-Item Turn-In Screen Overview

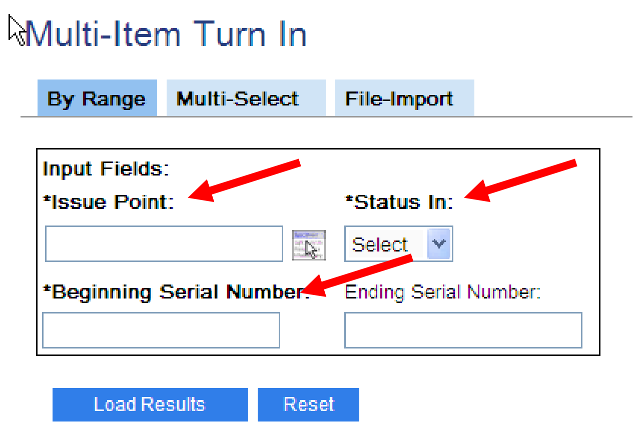
The *Material Functions/Transactions/Multi-Item Turn-In* allows users to turn-in multiple items through this screen. All items must be in the status of In Use for the specified issue point. The user can filter the data that is returned in the screen by the following fields: serial number, NSN, MSDS, Employee, Item Name, Date Out, Date Out Range and Zone. The user can use any combination from the previous list to narrow the results returned. There is a count function that allows the user to see how many records will be returned by the search criteria before loading the results. The screen will also handle auto turned in items, by putting them in the queue, thus allowing the weight and status to be changed. There are three tabs to this screen, the By Range tab, the Multi-Select tab and the File Import tab. Each will be covered in detail below.

Turning in a Range of Serial Numbers

The user is allowed to turn in multiple items at once by entering a valid range or several valid ranges of serial numbers. As the range is entered the serial numbers within that range are added to the queue. All items in the range must belong to the current issue point and have been issued out from that issue point.

To turn in a range of serial numbers:

1. Navigate to *Material Functions/Transactions/Multi-Item Turn-In*. The screen opens by default to the **By Range** tab. The required fields are indicated below:



2. Enter the Issue Point code. The Issue Point will default to the last one used by the user.

3. Select a status from the drop down list for the material to be turned in.

   Note: If the Status In is set to WS (waste), the Container field will appear. Enter the default waste container number to be used to dispose of the inventory.

   All items added to the grid will have the status selected. If that status is WS then all items will have the selected container assigned also. The defaults selected can be changed in the grid itself.

4. In the *+Beginning Serial Number* field enter the first serial number.

5. In the Ending Serial Number field enter the last serial number.

   Note: If only one item is being added, leave the Ending Serial Number field blank.

6. Click the Load Results button, the range selected will display.

   Note: Only valid ranges will be added and displayed. The criteria for a valid range are all of the following:

   - The inventory must belong to the same originating site.
   - Be issued from the current Issue Point.
   - Have a status of IU (In Use).
   - Serial numbers must be in sequence.

7. Once the items are populated in the grid, the data can be modified as required.

   Note: Do not change the sort order if the data has been modified, the changes will be lost.

   The following values can be modified:

   - Kg In – If status is EM, this defaults to 0. If status is UM or WS defaults to Kg Out value.
   - Qty In – If status is EM, this defaults to 0. If status is UM or WS defaults to Kg Out value.
   - Status In – Defaults as set when loading the range. The following values are available for selection:
     - UM (used material)
     - EM (empty)
     - WS (waste)
     - CT (contaminated)
     - SP (spilled)
     - LI (lost item)

  - o US (unserviceable)
- Shelf/Bin – Only available if status is UM
- Waste Container – Only available if status is WS. The default value is set when populating the range of serial numbers.

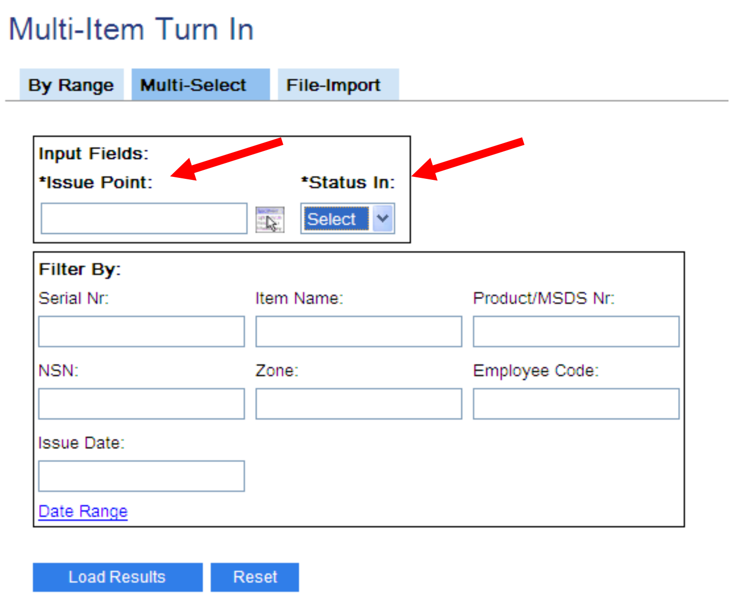
8. When the grid is populated with the correct information, click the **Turn In** button to turn in all checked items. The items that are checked will be turned in and removed from the grid. If the grid has multiple pages which have been viewed and checked will be processed.
9. The **Clear Grid** button will remove all items from the grid but will retain the data in the main portion of the screen.
10. The **Reset** button will reset the data in the main portion of the screen to the screens original state.

Turning in Multiple Inventory Items

By using the Multi- Select tab the user can populate the data by the issue point and turn in the items at the same time.

To turn in multiple inventory items:

1. Navigate to *Material Functions/Transactions/Multi-Item Turn-In*.
2. Click on the **Multi-select** tab. The required fields are indicated below:



3. Enter the Issue Point code. The Issue Point will default to the last one used by the user.
4. Select a status from the drop down list for the material to be turned in.

   Note: If the Status In is set to WS (waste), the Container field will appear. Enter the default waste container number to be used to dispose of the inventory.

   All items added to the grid will have the status selected. If that status is WS then all items will have the selected container assigned also. The defaults selected can be changed in the grid itself.
5. In the Filter By: block the user can narrow the results by utilizing the filters provided. (Optional) The following filters are available:
   - Serial # - Narrows results by serial number.
   - Item Name – Narrows results by item name.
   - MSDS – Narrows results by MSDS.
   - NSN – Narrows results by NSN
   - Zone – Narrows results by zone.
   - Employee Code – Narrows results by employee id.
   - Issue Date – Narrows results by a specific date.
   - Date Range Link – Narrows results issued between a From Issue Date to a To Issue Date.
6. Click the **Load Results** button to populate the grid.
7. Once the items are populated in the grid, the data can be modified as required.

   Note: Do not change the sort order if the data has been modified, the changes will be lost.

   The following values can be modified:
   - Kg In – If status is EM, this defaults to 0. If status is UM or WS defaults to Kg Out value.
   - Qty In – If status is EM, this defaults to 0. If status is UM or WS defaults to Kg Out value.
   - Status In – Defaults as set when loading the range. The following values are available for selection:
     - UM (used material)
     - EM (empty)
     - WS (waste)
     - CT (contaminated)
     - SP (spilled)

   - LI (lost item)
   - US (unserviceable)

- Shelf/Bin – Only available if status is UM
- Waste Container – Only available if status is WS. The default value is set when populating the range of serial numbers.

8. When the grid is populated with the correct information, click the **Turn In** button to turn in all checked items. The items that are checked will be turned in and removed from the grid. If the grid has multiple pages which have been viewed and checked will be processed.
9. The **Clear Grid** button will remove all items from the grid but will retain the data in the main portion of the screen.
10. The **Reset** button will reset the data in the main portion of the screen to the screens original state.

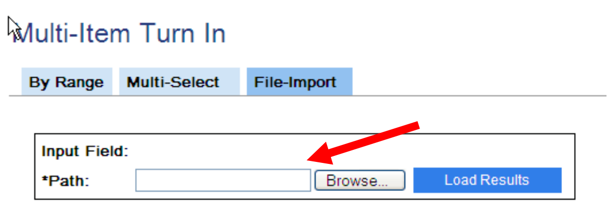
Turning in Inventory using File Import

By using the File Import tab a user can turn in multiple items at once by uploading a Microsoft Excel file containing the information for the inventory items that are being turned in. The file must follow these requirements for a successful import:

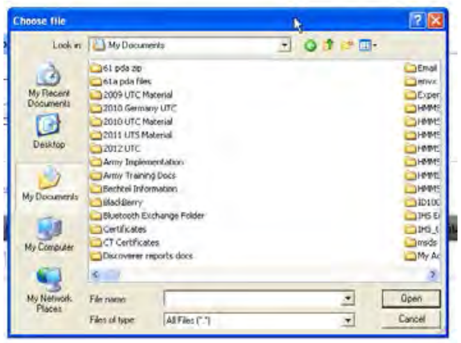
- File must be a valid xls or xlsx file
- All items ***must*** have the same issue point – create separate files for each issue point
- Each item must list the issue point
- Each item listed must have a serial number
- All data values must be valid for the type data in HMMS (example: Qty In must be a number)
- No more than 5000 rows of data

To turn in inventory by importing a file:

1. Navigate to *Material Functions/Transactions/Multi-Item Turn-In*.
2. Click on the **File-Import** tab. The required field is indicated below:



3. Click the **Browse** button to open a file dialog box.



4. Locate and select the file you want to import and then click **Open.** The path to upload the file is shown in the Path text box.
5. Click **Load Results** to load the file into the turn-in queue grid.

   Note: You can only load one file at a time. Uploading another file will clear the grid and replace the grid with the items from the new file.

6. Once the items are populated in the grid, the data can be modified as required.

Note: Do not change the sort order if the data has been modified, the changes will be lost.

The following values can be modified:

- Kg In – If status is EM, this defaults to 0. If status is UM or WS defaults to Kg Out value.
- Qty In – If status is EM, this defaults to 0. If status is UM or WS defaults to Kg Out value.
- Status In – Defaults as set when loading the range. The following values are available for selection:
  - UM (used material)
  - EM (empty)
  - WS (waste)
  - CT (contaminated)
  - SP (spilled)
  - LI (lost item)
  - US (unserviceable)
- Shelf/Bin – Only available if status is UM

- Waste Container – Only available if status is WS. The default value is set when populating the range of serial numbers.

7. When the grid is populated with the correct information, click the **Turn In** button to turn in all checked items. The items that are checked will be turned in and removed from the grid. If the grid has multiple pages which have been viewed and checked will be processed.
8. The **Clear Grid** button will remove all items from the grid but will retain the data in the main portion of the screen.

Turn In - No Label Screen Overview

The *Material Functions/Transactions/Turn In – No Label* screen is used to research information on material that has been issued but for some reason the serialized label for the material is either lost or illegible. You use this screen to take known information about the issue, and extrapolate from the database the most likely issues that fit the search criteria. For example, if you know the person turning in the material, or the date of issue, or the zone in which the employee was working, enter that information and HMMS will search for issues that meet those criteria. From the issue records you can then choose the most likely issue, and then reprint a label for the container, if necessary.

You can print a new label for the container from this screen or go the *Material Functions/Transactions/New Inventory* screen to create new inventory from the material and print a new label.

Prerequisites: Material must be issued.

Dependencies: None

Researching Material without a Label

1. Open the *Material Functions/Transactions/Turn in – No Label* screen.
2. Query for the data that help you find the container; the employee who issued the material, the zone in which the material was issued, etc.
3. Click on the View icon beside the record of the material that best answers the criteria of the material being turned in. When you do, the *Turn In – No Label screen opens.*
4. Open the *Current Issued Material* child section.
5. Click on the record of the item that matches the item with the missing or obscured label.

Note: If the search turns up no material that matches the criteria you may have to enter the data in the *Material Functions/Transactions/New Inventory* screen and print new labels.

6. Click the Print icon to print the tracking label.

Printing Material Labels when No Match is found

1. Use this set of instructions when you are turning in material without a label, or with one that is illegible, and when you search for a similar material.

2. When your research does not turn up any possible matches then click on the *New Inventory* icon to navigate to the *New Inventory* screen.
3. Create the new inventory as previously instructed.

In Use Replacement Screen Overview

The *Material Functions/Transactions/In Use Replacement* screen is used to replace items that are exhausted or not usable, within a site defined separable kit. A typical use is replacing one empty item in a kit, while other components of the kit are still usable and issued out.

For instance, there is a kit with 10 items in it, one of which is an aerosol can. The sprayer on the can gets clogged, so the customer goes back to the issue point to get it the can replaced. Rather than carrying all the items in the kit back to the issue point, turning them all in, having the issue point operator replace the item in the kit, then reissue the kit. The issue point operator will simply come to this screen, turn in the broken item, and issue out a new one. This can also be used on single, non-kit items.

Additional Information

Issue Point

- Material cannot be turned in an inactive issue point; inactive issue points will not be displayed in the LOV on the form.
- Access to the screen is controlled via the *Administration/System/User Access Profile* screen. If a user is not allowed to replace the material, that user will not be given access to this functionality.
- If the user has a default issue point configured in the user preferences screen, the field will be populated with this issue point.

System Configuration

- If there are no entries for this user, the user can turn in material to any issue point, including off-site issue points.
- If there is only one entry, the screen will populate automatically with this issue point.
- If there is more than one entry, the user will be limited to those issue points available from on the LOV.

If the *Scale Indicator* field on the *Configure Issue Point* child screen of the *Administration/Material/Issue Point* screen is set to either of the "Yes" options, the cursor will go directly to the *KGRAMS* field where the weight of the material will be recorded. This will only accept data directly from the scale.

HMMS will calculate the hours operated by subtracting the *Start Date* from the *End Date*. The hours operated can be manually updated by the user.

HMMS insures that the NSN of the replacement item is the same as the one being replaced. The user can only replace the item with the same item. If the NSN does not match, there is a bell sound generated and the following hint message displays.

> *The NSN of the replacement does not match the NSN of the turn in item*.

If the replacement item is part of a kit, or has the status of EM, IU, LI, SP, or CT the user will hear a bell sound and the following hint message will appear.

> *The serial number is either a part of a kit, or not able to be issued.*

Prerequisites: Item must be assigned to a kit, and the kit must be issued. Replacement item must be the same Product/MSDS number as the original item.

Dependencies: None.

Replacing an In-use Item

1. Open the *Material Functions/Transactions/In Use Replacement* screen
2. Enter the *+Issue Point Code* field, or click on the List icon to the right of the data field to select from the list the location you wish to replace the material from.
3. Enter the employee ID in the *+Emp ID* field.

4. Enter the serial number of the material that is being turned in into the *+Turn In Serial Nr* field. All the information about that serial number will populate the screen.
5. Enter the weight of the item being turned in.
    a. If you have a scale, place the item on the scale and press the **Print** button on the scale. The weight will populate the *+Kgrams In* field.
    b. If you do not have a scale, estimate the weight and enter it into the *+Qty In* field.
6. Enter the *+Status In* field. If zero was selected as the *Kgrams In* or *Qty In* then the *Status* will auto-populate with an EM.
7. If the original serial numbered item is being placed into a waste container, record the container number in the *Container Number* field, by either typing in the container number or selecting the container from the list of values icon.
8. If required, type a memo or comments about the serial numbered item in the *Memo/Note* field.
9. Scan or enter the serial number of the replacement material. This material must have the same MSDS number of the material being replaced.
10. Enter the weight of the item being issued out as a replacement.
    a. If you have a scale, place the item on the scale and press the **Print** button on the scale. The weight will populate the *+Kgrams Out* field.
    b. If you do not have a scale, navigate past the weight fields and the weight will auto-populate in both the *+Kgrams Out* and the *+Qty Out* fields.
11. Click the Save icon.

Undo Last Action Screen Overview

The *Material Functions/Transactions/Undo Issues* screen is used to allow users to undo an issue or a turn in. This screen allows users to fix mistakes made in the *Issue* and *Turn In* screens without having to go to the system administrator. The Undo function allows the last issue or turn in to be reversed in the event that it was made incorrectly.

Prerequisites: Must have a Transaction to undo, either an issue or turn-in.

Dependencies: None

Undo Last Action

1. Open the *Material Functions/Transactions/Undo Last Action* screen.
2. Query for the item on which you want to reverse the most recent transaction.

3. Click on the Edit icon beside the serial number of the item on which you want to undo the most previous transaction.

   OR

4. Click the New icon.
5. Type or Scan the serial number in.
6. Hit the *Enter* key on your keyboard.
7. Review the data on the screen, ensuring the item listed is the one you want to perform the undo transaction on.
8. Click the *Undo* button to undo the last transaction.
9. Click the *Ok* button on the confirmation message.

MATERIAL TOOLS

Delete Inventory Screen

The *Material Functions/Tools/Delete Inventory* screen allows you to delete items that have been entered into the system incorrectly. Only new inventory, inventory that has never been issued, can be deleted. For example, use this screen if you have inadvertently created inventory with the incorrect quantity, or perhaps an incorrect MSDS number was keyed into the system and committed.

Using this screen does not actually purge the system of the inventory information; it only assigns a status of "Deleted" to the inventory being deleted.

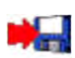
Prerequisites: You must have inventory to be deleted and that inventory must have no record of being issued.

Dependencies: None

Deleting Inventory

1. Open the *Material Functions/Tools/Delete Inventory* screen.
2. Select the issue point from which the inventory will be deleted.
3. With the scanner or the keyboard, in the *+Beginning Serial Number* field enter the first serial number in the sequence of the inventory to be deleted.
4. With the scanner or the keyboard, in the *+Ending Serial Number* field enter the last serial number in the sequence of the inventory to be deleted.

   Note: If you are only deleting one inventory item, entry in this field in not necessary.

5. Click the  Show Details button.
6. The system requires that you enter any explanatory detail regarding the reason the inventory was deleted into the *+Memo* field before you can continue beyond this screen.
7. Click the  Save icon.

Kit Definition Screen Overview

The *Material Functions/Tools/Kit Definition* screen is used to define new manufacturer (and site) defined kits, and view and/or modify existing kits. Kits are groups of items that are usually distributed and used together. In HMMS the person issuing the material only has to issue one item of the kit, the rest of the items in the kit automatically are issued with the first, thus greatly speeding the issue. The reverse is also true when turning in the material after use; turning in one item of the kit automatically identifies the remaining items of the kit as turned in.

In this screen you might define a Kit ID called "5QRTMOF", with no specific serialized items associated with the kit definition. In the *Material Functions/Tools/Kit Build/Break* screen you would assign the serialized quarts of oil and oil filter that will make up the kit.

Separable and Non-Separable Kits
Separable kits include items that can be physically separated and weighed separately. Kits that are non-separable include items that cannot be separated or weighed separately. A paint/pigment mixture is an example of a non-separable kit.

Manufacturers and Site-Defined Kits
A manufacturer's kit is one that is assembled prior to its arrival at the facility. A site-defined kit is one whose components are assembled on-site.

Prerequisites: MSDS for each part of the kit must be in the database and have an active status.

Dependencies: You must set up a kit definition here before you can build a kit.

Entering a Kit Definition

1. Open the *Material Functions/Tools/Kit Definition* screen.
2. Click the New icon.
3. Enter the following fields:
    a. *+Kit ID* – site defined identification for the kit.
    b. *Definition Source* – select from the drop down either Site or Manufacturer.
    c. *Kit Description* – the description of the kit.
    d. *Separable* checkbox – indicates if the kit is separable or not.
4. Click the Save icon.
5. If you are creating a Manufacturer’s defined kit, you will receive a pop-up message that states the Manufacturer Kit cannot be saved unless components are assigned. Click the OK button.
6. Open the *Kit Components* child section. To assign the components.

7. Click the New icon.
8. Select the *Product/MSDS* number from the list of values or type in the Product/MSDS number. Once selected the rest of the information will populate. If necessary, type in the mix ratio. This will allow the system to calculate the VOC data correctly.
9. Click the Save icon.
10. Repeat steps 7 – 9 until all components have been assigned to the kit.

Editing a Kit Definition

1. Open the *Material Functions/Tools/Kit Definition* screen.
2. Query to find the kit definition you want to modify.
3. Click the Edit icon beside the record you want to modify.
4. Make the necessary changes to the record.
5. Click the Save icon.

Deleting a Kit Definition

You can only delete a Kit Definition if it has not been used to create a kit.

1. Open the *Material Functions/Tools/Kit Definition* screen.
2. Query to find the kit definition you want to delete.
3. Click the Delete icon beside the record you want to delete. If the icon does not appear you cannot delete the record.
4. Click the Yes button on the confirmation message.

Kit Build/Break Screen Overview

The *Material Functions/Tools/Kit Build/Break* screen is used to put inventory items together into kits based on a kit definition (Kit ID), replace a part of a kit with a replacement inventory item, or completely disassemble a kit back to singular inventory items. Kits are groups of items to be issued out together. This screen is where those items are assembled or disassembled.

Prerequisites: Before you can build a kit, you must create a kit definition. The serial numbers must be in the Issue Point inventory.

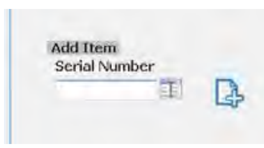
Dependencies: None

Assembling a Kit

1. From the *Material Functions/Tools/Kit Build/Break Search* screen, query for the Issue Point.
2. Select the Kit ID for the kit you are creating. If there is already a definition for the kit you want to assemble, click on the Edit icon on the line representing that kit. The Kit Build/Break screen will appear and populate the appropriate data fields according to the Kit Definition.

   Note: If you are assembling a kit that has never been defined before, navigate to the Kit Definition Screen, then define and save the kit before attempting this step.

3. To add items to a kit. In the *Add Item* block, to the right of the *Serial Number* field, you will find a Show List icon. You can select the serial number from the list by clicking on that icon, or you can scan or type the serial number in manually. When you have the serial number selected, click on the new icon to add the item to the kit.

4. Repeat step 3 until the kit is completed. If you wish to view the items you have added to the kit, click on the *Kit Components* child section.
5. Click the Save icon.

Adding One or More Items to a Kit

After adding items to the kit, the items can no longer be issued individually; they must be issued with the other items in the kit. The entire kit can be broken apart at a later time, or the item can be removed from the kit, as needed.

1. Open the *Material Functions/Tools/Kit Build-Break* screen.
2. Query for the kit to which you want to add the item.
3. Click the Edit icon beside the record of the kit to which you want to alter.
4. If using a scanner, place the cursor in the *Add Item-Serial Number* field, and scan the serial number of the items to be added to the kit.

5. If manually entering the serial number of the kit, you have the choice of selecting or entering the serial numbers in the *Add Item-Serial Number* field and clicking the icon beside it.

Removing One or More Items from a Kit

After removing items from the kit, the items can again be issued individually, without being issued with the other items in the kit.

1. Open the *Material Functions/Tools/Kit Build-Break* screen.
2. Query for the kit from which you want to remove the item.
3. Click the Edit icon beside the record of the kit from which you want to remove an item.
4. If using a scanner, place the cursor in the *Remove Item-Serial Number* field, and scan the serial number of the items to be removed from the kit and clicking the Delete icon beside it.
5. If manually entering the serial number of the kit, you have the choice of selecting or entering the serial numbers in the *Remove Item-Serial Number* field and clicking the Delete icon beside it.
6. Click the Save icon.

Shelf/Bin Screen Overview

The *Material Functions/Tools/Shelf/Bin* screen is used to assign material to particular shelves, bins, or other identifiable places within an issue point. Assigning material in this way makes the material easier to locate. This eases inventory control and reduces confusion. The Shelf/Bin function can be used to display the different shelf/bin locations within an issue point and the inventory items stored at the shelf-bin locations. When material is created, it can be associated with a shelf/bin.

This screen is used only to keep record of the items in a shelf-bin. This includes assigning items to the shelf/bin, moving items to a different shelf/bin, and assigning the items to no specific location.

The user can create the actual shelf-bin locations two different ways: On the *Administration/Material/Issue Points* screen, in the *Shelf/Bins for Issue Point* child screen or on the *Material Functions/Tools/Shelf/Bin* screen. Both with be covered below.

Shelf/Bin Management Screen

The Shelf/Bin Management screen provides the ability to move items from one Shelf/Bin to another within an issue point and create, modify and delete Shelf/Bins.

Move Selected Inventory

You can select one or multiple inventory items and then move the selected inventory to a different shelf/bin. Check boxes are provided for selecting inventory. Selecting the check all check box will only select inventory on the current page you are viewing in the grid (and any items connected to a selected case or kit). If you want to move all the items on a shelf/bin use the move all feature.

Move All Inventory

You can move the entire inventory on a shelf/bin to another location in the issue point. You can choose to move the items to an unassigned location in the issue point or to a different shelf/bin.

Moving Cases

You can move an entire case to a different shelf/bin or move individual items in a case. If you select the case ID all items in the case are selected. If you move individual items to a different shelf/bin than the shelf/bin where the case ID is located, the system will remove those items from the case.

You can click the case icon to view a list of all the items in the case.

Moving Kits

Items that are part of a kit are indicated by kit icons. The kit icons are as follows:

Manufacturer non-separable

Manufacturer separable

Site-defined non-separable

Site-defined separable

When you select a kit item all items in the kit are selected. If you select an item that belongs to a kit the entire kit is selected to be moved. If you want to move kit items to separate shelves/bins you must use the build break function first. You cannot break kits on the shelf/bin screen.

You can click the kit icon to view all the items in the kit.

Viewing an Item's MSDS

You can click on the MSDS ID to view the MSDS for that item. If multiple MSDSs exist for the item a screen will open showing all the MSDSs for the item. Then you can browse the list, locate the specific MSDS you want and click to view it.

Assigning Unassigned Items to a Shelf-Bin

The shelf/bin screen allows you to assign items to a shelf or bin. Typically, inventory is assigned to a shelf/bin when it is recorded as new inventory, received from a transfer, or when it is turned in. However, occasionally you will have need of moving inventory from one shelf/bin to another or assigning inventory to a shelf or bin when it was not previously assigned, you can use the shelf/bin screen to accomplish that.

1. Open the *Material Functions/Tools/Shelf-Bin* screen.
2. In the Issue Point field, enter the issue point that you will be working in to move inventory items to other shelf/bins.

   Once you enter an issue point the shelf/bins for the issue point will show in the Shelf/bins column below. The area titled, Unassigned Items is selected by default and the inventory that are Unassigned Items are displayed in the inventory table.
3. Select the items you want to move and click the Move Selected Items icon.

   Note: If you are select an item that is part of a kit all items in the kit will be selected. If you select a master record for a case (indicated by the case icon and empty fields in the data) all items in the case will be selected. If you select items that are part of a case without selecting the master case record those items will be moved away from the master case record and the system will take those items out of the case.

   Or

   Click Move All icon  to move all the items on the selected shelf/bin.
4. From the Move Selected Items popup, in the Shelf/Bin drop-down, select the shelf/bin where you want to move the items to.
5. Click **Proceed**. .

Assigning New Inventory to a Shelf-Bin

Items can be assigned to a shelf-bin when creating new inventory, you need not enter the *Material Functions/Tools/Shelf-Bin* screen. This function is performed in the *Material Functions/Transactions/New Inventory screen.*

1. Open the *Material Functions/Transactions/New Inventory screen.*

2. In the *Issue Point* field, enter the identifier for the issue point in which the shelf/bin is located.
3. Fill in the rest of the fields on the screen as necessary, making sure to enter the shelf-bin in the *Shelf-Bin* field. The shelf-bins you will have to choose from in the list are those that have been entered for the issue point selected in the *Issue Point* field.
4. When all the necessary fields have been entered, click the Save icon.

Assigning Material to a Shelf Bin from the Receive Screen

Items can be assigned to a shelf-bin when receiving the material into inventory; you need not enter the *Material Functions/Tools/Shelf-Bin* screen. This function is performed in the *Material Functions/Transactions/Receive screen.*

1. Open the *Material Functions/Transactions/Receive screen.*
2. The logged in user's default issue point record will appear in the + *Issue Point Code* field. If this is not the correct receiving issue point, select the proper issue point.
3. Once you have selected the material to receive, assign the material to a shelf/bin by selecting a shelf/bin in the *Shelf Bin* field of the *Pending Receipts* child section.
4. Click the Save icon.

Moving selected inventory from one shelf/bin to another

You can select one or multiple inventory items and then move the selected inventory to a different shelf/bin. Check boxes are provided for selecting inventory. Selecting the check all check box will only select inventory on the current page you are viewing in the grid (and any items connected to a selected case or kit). If you want to move all the items on a shelf/bin use the move all feature.

To move selected items to a different shelf/bin:

1. Open the *Material Functions/Tools/Shelf/Bin*.
2. In the Issue Point field, enter the issue point that you will be working in to move inventory items to other shelf/bins.

   Once you enter an issue point the shelf/bins for the issue point will show in the Shelf/bins column below. The area titled, Unassigned Items is selected by default and the inventory in Unassigned Items will display in the inventory table.
3. Select the shelf/bin that you want to move items from.

   The items in the Inventory table will change to show the inventory on the selected shelf/bin.

4. Select the items you want to move and click the Move Selected Items icon .

   Note: If you are select an item that is part of a kit all items in the kit will be selected. If you select a master record for a case (indicated by the case icon and empty fields in the data) all items in the case will be selected. If you select items that are part of a case without selecting the master case record those items will be moved away from the master case record and the system will take those items out of the case.

5. From the Move Selected Items popup, in the Shelf/Bin drop-down, select the shelf/bin where you want to move the items to.
6. Click **Proceed**.

Moving all inventory from one shelf/bin to another

The items you clear from a shelf or bin will not be assigned to a specific location in the issue point. You can move items from the shelf or bin to another shelf or bin if you want to clear a shelf or bin but do not want the inventory to unassigned.

To move selected items to a different shelf/bin:

1. Open the *Material Functions/Tools/Shelf/Bin* screen.
2. In the Issue Point field, enter the issue point that you will be working in to move inventory items to other shelf/bins.

   Once you enter an issue point the shelf/bins for the issue point will show in the Shelf/bins column below. The area titled, Unassigned Items is selected by default and the inventory in Unassigned Items will display in the inventory table.

3. Select the shelf/bin that you want to move items from or select Unassigned Items to move items from the Unassigned Items area.
4. Click Move All icon to move all the items on the selected shelf/bin.
5. From the Move Selected Items popup, in the Shelf/Bin drop-down, select the shelf/bin where you want to move the items to.
6. Click **Proceed**.

Creating Shelf/Bins

You can create shelf/bins two ways: You can use the shelf/bin screen. You can use the Issue Point screen. The following provides instructions for either case.

To create a shelf/bin using the issue point screen:

1. Open the *Administration/Material/Issue Points* screen.
2. Perform a search to find the issue point where you want to add a shelf/bin.
3. Click on the edit icon beside the issue point where you want to add a shelf/bin.
4. Open the Shelf/Bins for Issue Point child record.

5. Click the New icon to add a new shelf or bin.

   A new line will appear for your shelf or bin.

7. Enter the appropriate shelf or bin information.
8. Click the save icon on the Shelf/Bins for Issue Point child record.

To create a shelf/bin using the shelf/bin screen:

1. Open the *Material Functions/Tools/Shelf/Bin* screen.
2. In the Issue Point field, enter the issue point where you want to create a shelf/bin.

   Once you enter an issue point the shelf/bins for the issue point will show in the Shelf/bins column below.

3. Click the Add icon.

   The Shelf/Bin details dialog opens.

4. In the Shelf/Bin ID field, enter the identifier you want to use for the new shelf/bin.
5. In the Temp Code field, select the temperature code you want to assign the new shelf/bin.
6. Click **Save**.

Modifying Shelf/Bins

You can modify existing shelf/bins two ways: You can use the shelf/bin screen. You can use the Issue Point screen. The following provides instructions for ether case.

To modify a shelf/bin using the issue point screen:

1. Open the *Administration/Material/Issue Points* screen.
2. Perform a search to find the issue point where you want to modify a shelf/bin.
3. Click on the edit icon beside the issue point where you want to modify a shelf/bin.
4. Open the Shelf/Bins for Issue Point child record.
5. If you want to rename a shelf/bin, click in the Shelf/Bin text box and change the name as needed.
6. If you want to change the temperature code for a shelf/bin, click the Temperature Code drop-down and select the new temperature code.
7. When you are done making changes, click the save icon on the Shelf/Bins for Issue Point child record.

To modify a shelf/bin using the shelf/bin screen:

1. Open the *Material Functions/Tools/Shelf/Bin* screen.
2. In the Issue Point field, enter the issue point where you want to modify a shelf/bin.

   Once you enter an issue point the shelf/bins for the issue point will show in the Shelf/bins column below.
3. Select the shelf/bin that you want to modify.
4. Click the Edit icon.

   The Shelf/Bin details dialog opens.
5. If you want to change the shelf/bin ID, in the Shelf/Bin ID field, change the identifier as needed.
6. If you want to change the temperature code for the shelf/bin, in the Temp Code field, select the new temperature code.
7. Click **Save**.

Deleting Shelf/Bins

You can delete shelf/bins two ways: You can use the shelf/bin screen. You can use the Issue Point screen. The following provides instructions for either case.

To delete a shelf/bin using the issue point screen:

1. Open the *Administration/Material/Issue Points* screen.
2. Perform a search to find the issue point that has the shelf/bin you want to delete.
3. Click on the edit icon beside the issue point that has the shelf/bin you want to delete.
4. Open the Shelf/Bins for Issue Point child record.
5. Select the shelf/bin you want to delete.
6. Click the Delete icon.

   Any inventory on the shelf/bin will be moved to the "Unassigned Items" area of the issue point. If you want to specify a shelf/bin for the new inventory, use the shelf/bin screen to delete the shelf/bin (instructions below).
7. Click the Save icon located at the top of the child record.

To delete a shelf/bin using the shelf/bin screen:

1. Open the *Material Functions/Tools/Shelf/Bin* screen.
2. In the Issue Point field, enter the issue point where you want to delete a shelf/bin.

Once you enter an issue point the shelf/bins for the issue point will show in the Shelf/bins column below.

3. Select the shelf/bin that you want to delete.
4. Click the Delete icon.

   The Delete Shelf/Bin dialog opens.
5. If there are no items on the shelf/bin, click proceed to delete the shelf/bin.

   Or

   If there are items on the shelf/bin:

   a. In the Shelf/Bin drop down, select the shelf/bin where you want to move the items that are on the shelf/bin you are deleting.
   b. Click proceed to move the items and delete the shelf/bin.

Update Inventory Screen Overview

This screen should be used with caution, and its use should be limited.

The *Material Functions/Tools/Update Inventory* screen is used to perform mass updates to limited inventory information. Typical applications include:

- Correcting lot batch numbers
- Correcting original expiration dates
- Correcting original quantities
- Assign “Excess Inventory” status

Some of the fields in this screen can only be changed if the status of the material is New Material (NM).

You cannot use this screen to extend the shelf life of your inventory. Not only will this screen not work for this function, attempting to do so could cause data irregularity.

Prerequisites: There must be inventory in the system.

Dependencies: None

Updating Inventory

1. Open the *Material Functions/Tools/Update Inventory* screen.
2. Define which inventory records need updating:

- In the *Auto Serial Number Range* field enter one of the serial numbers for which you want to modify data. With a serial number entered in this field, click the Calculate icon. The *Beginning Serial Number* and *Ending Serial Number* fields will automatically populate with inventory items that have the same product number and were entered at the same time as the product entered in the *Auto Serial Number Range* field.
- In the *Beginning Serial Number* and *Ending Serial Number* fields enter the first and last numbers (must be consecutive with no breaks) of the sequence for which you want to modify data.

3. Click the Show Details icon. After you do, the *Update Inventory* screen will open.
4. In the *Update Inventory* screen make the changes to the inventory as required.
5. Click the Save icon.
6. Verify the changes in the *Inventory to be Updated* child screen.

Assigning Material as Excess

1. Open the *Material Functions/Tools/Update Inventory* screen.
2. Define which inventory records need updating:
   - In the *Auto Serial Number Range* field enter one of the serial numbers for which you want to modify data. With a serial number entered in this field, click the Calculate icon. The *Beginning Serial Number* and *Ending Serial Number* fields will automatically populate with inventory items that have the same product number and were entered at the same time as the product entered in the *Auto Serial Number Range* field.
   - In the *Beginning Serial Number* and *Ending Serial Number* fields enter the first and last numbers (must be consecutive with no breaks) of the sequence for which you want to modify data.
3. Click the Show Details icon. After you do, the *Update Inventory* screen will open.
4. Click in the Excess Ind ☐ Excess Ind box. This will add a checkmark to the selected inventory, which indicates that the material is excess.
5. Click the Save icon.

Reprint Labels Screen Overview

The *Material Functions/Tools/Reprint Labels* screen is used to reprint labels that have become separated from their containers and have become lost, have been covered over and can no longer be read, or were improperly printed during the first printing.

This screen is not used to print new inventory labels. It is **ONLY** to be used to reprint labels for inventory already created. See the *Material Functions/Transactions/New Inventory* screen for information on printing new inventory labels.

Prerequisites: Serial Numbers must already be created.

Dependencies: None

Reprinting Inventory Labels

1. Open the *Material Functions/Tools/Reprint Labels* screen.
2. In the *+Issue Point* field, select the issue point in which the items that need new labels are located.
3. Enter the first and last serial numbers of the sequence of serial number of the items that need new labels. If you only need one label, enter the serial number in the *Beginning Serial Number* field.
4. Select the type of labels you want to print, by clicking in the appropriate checkbox.
5. Click the Show Details icon and open the *Inventory List* child screen to view details about the items for which the labels will be printed.
6. Click the Print icon.

Inventory Available for Transfer Management Screen Overview

The *Material Functions/Tools/Inventory Available for Transfer Management* screen allows a site to make inventory items available to other sites. The screen allows you to search for items within your site and mark them available for other sites.

Prerequisites: You must have an Issue Point established, inventory created and a partnership setup with other HMMS sites.

Dependencies: Issue Point and Facility screens.

Marking Inventory Available for Transfer

1. Open the *Material Functions/Tools/Inventory Available for Transfer Management* screen.

2. Select the *[AT] Indicator* desired from the drop down.
3. Select the *+Issue Point*, by either typing or clicking the List of Values icon.
4. Click the *Search* button.
5. To select the inventory to mark click in the checkbox under the Available column. If you are going to make the entire inventory available click the Select All icon.
6. Click the Save icon.

Marking Inventory Available for Transfer by NSN

1. Open the *Material Functions/Tools/Inventory Available for Transfer Management* screen.
2. Select the *[AT] Indicator* desired from the drop down.
3. Select the *+Issue Point*, by either typing or clicking the List of Values icon.
4. Select the *NSN,* by either typing or clicking the List of Values icon.
5. Click the *Search* button.
6. To select the inventory to mark click in the checkbox under the Available column. If you are going to make the entire inventory available click the Select All icon.
7. Click the Save icon.

Marking Inventory Available for Transfer by Product/MSDS

1. Open the *Material Functions/Tools/Inventory Available for Transfer Management* screen.
2. Select the *[AT] Indicator* desired from the drop down.
3. Select the *+Issue Point*, by either typing or clicking the List of Values icon.
4. Select the *Product/MSDS,* by either typing or clicking the List of Values icon.
5. Click the *Search* button.
6. To select the inventory to mark click in the checkbox under the Available column. If you are going to make the entire inventory available click the Select All icon.
7. Click the Save icon.

Marking Inventory Available for Transfer by Case Serial Nr

1. Open the *Material Functions/Tools/Inventory Available for Transfer Management* screen.
2. Select the *[AT] Indicator* desired from the drop down.
3. Select the +*Issue Point*, by either typing or clicking the List of Values icon.
4. Select the *Case Serial Nr,* by either typing or clicking the List of Values icon.
5. Click the *Search* button.
6. To select the inventory to mark click in the checkbox under the Available column. If you are going to make the entire inventory available click the Select All icon.
7. Click the Save icon.

Marking Inventory Available for Transfer by Serial Number

1. Open the *Material Functions/Tools/Inventory Available for Transfer Management* screen.
2. Select the *[AT] Indicator* desired from the drop down.
3. Select the +*Issue Point*, by either typing or clicking the List of Values icon.
4. Select the *Serial Number,* by either typing or clicking the List of Values icon.
5. Click the *Search* button.
6. To select the inventory to mark click in the checkbox under the Available column. If you are going to make the entire inventory available click the Select All icon.
7. Click the Save icon.

Marking Inventory Available for Transfer by Status

1. Open the *Material Functions/Tools/Inventory Available for Transfer Management* screen.
2. Select the *[AT] Indicator* desired from the drop down.
3. Select the +*Issue Point*, by either typing or clicking the List of Values icon.
4. Select the *Status,* by selecting the status from the drop down list.
5. Click the *Search* button.

6. To select the inventory to mark click in the checkbox under the Available column. If you are going to make the entire inventory available click the Select All icon.
7. Click the Save icon.

AUL Quick Add

The AUL Quick Add screen is used to quickly authorize and/or unauthorize selected Zones by NSN or Product Number. Users will search by NSN or Product Number and select which Zones to authorize and/or unauthorize for the NSN/Product Number.

Prerequisites: You must have SDS records in the system, zones must be setup, and training and processes must be setup.
Dependencies: The site configuration "AUL performed by means of Product Number or NSN" determines whether material is authorized by NSN or Product Number.

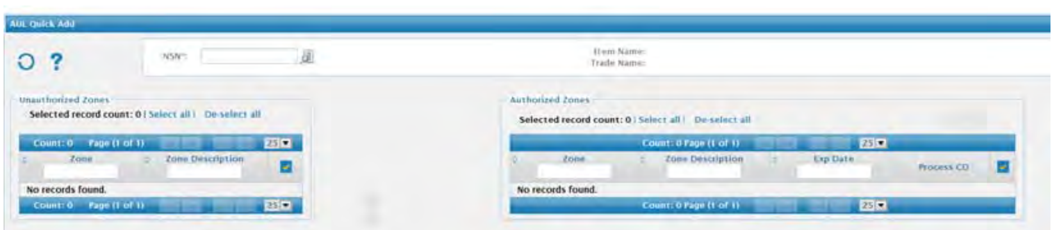
Note: The search filter that appears is based on the "**AUL performed by means of Product Number or NSN**" site configuration. If the site is configured to perform AUL based on NSN, the application will display a NSN-based search. If the site is configured to perform AUL based on Product/SDS, the application will display a Product/SDS-based search.

ATTENTION: The ability to modify the authorization status, expiration date, and process code of multiple records can substantially impact site practices and exposure controls. The AUL Quick Add screen must be tightly monitored and controlled by site administrators to avoid overwriting records with erroneous process codes and expiration dates, or unintentionally authorizing NSN/Products.

Authorizing Zones using AUL Quick Add

To Authorize One or More Zones using AUL Quick Add:

1. Navigate to *Material Functions* > *Tools* > ***AUL Quick Add*** to open the AUL Quick Add screen.



2. Perform a search by NSN or Product Number (based on site configuration).
3. The application will display all Zones currently authorized (right side) and all Zones currently unauthorized (left side).

4. Select all records you wish to Authorize in the "Unauthorized Zones" grid on the left hand side.
5. When you have selected all Zones you wish to authorize for the NSN or Product Number, click the "Authorize" icon .
6. The application will display a new dialogue box. If applicable, input the Authorization Date and the Process Code.
7. Click "OK". All selected Zones will now be authorized to use the NSN or Product Number.

To Authorize ALL Zones using AUL Quick Add:

1. Navigate to *Material Functions* > *Tools* > ***AUL Quick Add*** to open the AUL Quick Add screen.
2. Perform a search by NSN or Product Number (based on site configuration).
3. The application will display all Zones currently authorized and all Zones currently unauthorized.
4. Select the check box in the column header to select all records on the current page. To select all available records on all pages, select the "Select ALL Pages" hyperlink.
5. Click the Authorize All icon .
6. All Zones listed in the Unauthorized Zones list will now appear in the Authorized Zones list.
7. The application will display a new dialogue. If applicable, input the Authorization Date and the Process Code.
8. Click "OK". All available Zones will now be authorized to use the NSN or Product Number.

Deauthorizing Zones Using AUL Quick Add

Note: If the "**Allow users to permanently delete NSN or MSDS numbers from the AUL**" site configuration is set to "No," the expiration date for the selected, deauthorized AUL items will be set to the current date, effectively deauthorizing the items. The items will still appear in the "Authorized" table; however, they will no longer be authorized for usage. If sites wish to reauthorize the items, they must set a new expiration date.

To Deauthorize One or More Zones using AUL Quick Add:

1. Navigate to *Material Functions* > *Tools* > ***AUL Quick Add*** to open the AUL Quick Add screen.
2. Perform a search by NSN or Product Number (based on site configuration).
3. The application will display all Zones currently authorized and all Zones currently unauthorized.
4. Select all records you wish to deauthorize in the "Authorized Zones" grid on the right hand side.
5. When you have selected all Zones you wish to deauthorize for the NSN or Product Number, click the “Deauthorize" icon .
6. All selected Zones will no longer be authorized to use the NSN or Product Number.

To Deauthorize All Zones using AUL Quick Add:

1. Navigate to *Material Functions* > *Tools* > ***AUL Quick Add*** to open the AUL Request screen.
2. Perform a search by NSN or Product Number (based on site configuration).
3. The application will display all Zones currently authorized and all Zones currently unauthorized.
4. Click the Deauthorize All icon .
5. All Zones listed in the Authorized Zones list will now appear in the Unauthorized Zones list.

MATERIAL QUERIES

Display All Inventory Screen Overview

The Display All Inventory screen is used for three purposes:

- Printing a report showing an inventory list for the selected inventory by status and the issue point in which it is located.
- Printing a detailed report that shows detailed information on a particular serial number.
- Researching inventory information.

This screen will show any material status. These statuses include New Material (NM), Used Material (UM), Expired (EX), In Use (IU), Deleted (DL), Empty (EM), Lost Inventory (LI), Contaminated (CT), Spilled (SP), Unserviceable (US), and Waste (WS).

This screen includes a main screen with material information and the kit, issue, transfer, and breakdown history (as applicable) for the material. This screen will display inventory information regardless of the current status of the material.

Prerequisites: You have to have inventory to view.

Dependencies: None

Displaying All Inventory

1. Open the *Material Functions/Queries/Display All Inventory* screen.
2. Query for record of the material you want to review.
3. Click the View Details icon beside the record you want to view.
    - Open the *Kit Components Records* child section to see what kit(s) the item has been a part of.
    - Open the *Issue History Records* child section to view a detailed issue history for the material.
    - Open the *Transfer History Records* child section to see where and when the material has been issued to and from.
    - Open the *Original Inventory Breakdown* child section to see the breakdown history of the material.

Note: To display inventory when there is no data in the *Original Inventory Breakdown* try using the *Current Inventory Breakdown*, highlight the line representing the container and then click on the View icon.

Display Current Inventory Screen Overview

The Display Current Inventory screen is used for three purposes:

- Printing a report showing an inventory list for the selected inventory by status and the issue point in which it is located.
- Printing a detailed report that shows detailed information on a particular serial number.
- Researching inventory information.

This screen will show only current inventory material statuses. These statuses include New Material (NM), Used Material (UM), Expired (EX), and In Use (IU).

This screen includes a main screen with material information and the kit, issue, transfer, and breakdown history (as applicable) for the material.

Prerequisites: You have to have inventory to view.

Dependencies: None

Displaying Current Inventory

1. Open the *Material Functions/Queries/Display Current Inventory* screen.
2. Query for record of the material you want to review.
3. Click the View Details icon beside the record you want to view.
    - Open the *Kit Components Records* child section to see what kit(s) the item has been a part of.
    - Open the *Issue History Records* child section to view a detailed issue history for the material.
    - Open the *Transfer History Records* child section to see where and when the material has been issued to and from.
    - Open the *Original Inventory Breakdown* child section to see the breakdown history of the material.

Note: To display inventory when there is no data in the *Original Inventory Breakdown* try using the *Current Inventory Breakdown*, highlight the line representing the container and then click on the View icon.

Display Requests History Screen Overview

The *Material Functions/Queries/Display Requests History* screen is used to find information about requests made for inventory items. From this screen you can view the status of the request; the comments associated with it, and can also take action on the request.

Prerequisites: There must be requests in the system.

Dependencies: Authorization, Purchase Card, and Order Screens being used.

Reviewing a Request

1. Open the *Material Functions/Queries/Display Requests History* screen.
2. Query for the request you want to review.
3. Click the View Details icon beside the record you want to view.
4. When the request displays you will be able to:
   - View the status of the request at each step of the authorization process.
   - Click on a record in the *Activity Detail* table to view the comments input at that step of the workflow.
   - Click the *Request Information* link to the right of the table to launch the request screen.

Display AUL Renewal History

The *Material Functions/Display AUL Renewal History* screen is used to display and review the AUL Adjustment details.

Note: This query is available for USMC Sites only.

1. Navigate to *Material/Queries/Display AUL Renewal History* to open the AUL Renewal History screen.
2. Search for the AUL information by selecting the *AUL Doc #* from the List of Values by clicking on the Search icon .
   or

3. Search by Zone by selecting the *Zone* from the List of Values by clicking on the Search icon .
or
4. Search by NSN by selecting the *NSN* from the List of Values by clicking on the Search icon .
5. Click the Search button to execute the query.

Display Total Inventory Screen Overview

The *Material Functions/Queries/Display Total Inventory* screen is used to display and review the quantity and location of the on-site inventory of a given material. By entering a product number and executing a query, you can view inventory information on the selected product number by location, serial number, status, quantity, and other categories. This screen is a good tool for one issue point that may be low on a particular material to locate where else that material is within a facility for a transfer.

Prerequisites: You have to have inventory to view.

Dependencies: None

Using the Display Total Inventory Screen

1. Open the *Material Functions/Queries/Display Total Inventory* screen.
2. Query for the item you want to research.
3. Click the View Details icon beside the record of the material you want to view. The *Total Inventory Information* screen will open.
4. Open the *Inventory Information* child section to view details regarding the specific inventory items with the product number.

Material Research Search Screen Overview

The *Material Functions/Queries/Material Research* screen is used to research material by Zone, NIOSH, CAS, and other criteria. This screen is helpful when you need to see the zones that are licensed for the material and those zones where the material is authorized.

Prerequisites: None

Dependencies: None

Researching Material

1. Open the *Material Functions/Queries/Material Research* screen.
2. Query for record of the material you want to review.
3. Click the View Details icon beside the record you want to view.

- Open the *Matching Material Licenses* child section to view licenses that include the selected material.
- Open the *Matching Material Authorizations* child section to view the zones that are authorized for the selected material.

External Inventory Search Screen Overview

The *Material Functions/Queries/External Inventory Search* screen is used to view the available inventory from an external HMMS site that you have established a partnership or relationship with for the purposes of sharing or transferring inventory.

Prerequisites: You must have an inventory sharing partnership and an external site must make inventory available to you.

Dependencies: Facility, and Issue Point Screens

Query for External Inventory

1. Open the *Material Functions/Queries/External Inventory Search* screen.
2. Select the *Row Limit* from the drop down list.
3. Select the status from the *Filter* drop down list.
4. Select the *Site Name* from the drop down list.
5. Select the search criteria from the drop down list (default is Issue Point).
6. Select the condition operator from the drop down list (default is =).
7. Type in your search criteria.
8. If necessary click the *And/Or* button to add more search criteria.
9. Click the *Search* button to execute the search.
10. Your search results are returned in the *Query External Inventory* area.

External Material Transactions Screen Overview

This interface allows to automatically record material issues and transfers from an external system GSA Enhanced Check Out (GECO) into the HMMS system. This allows the entire hazardous inventory used at the facility to be tracked and managed in the HMMS system.

The HMMS manager can see and print all of the material transaction received as part of this interface.

Note: GSA Enhanced Checkout is a system used at GSA ServMarts to sell materials to employees. If the material sold is a hazmat material, then using this batch interface materials can be tracked into the HMMS system.

How does the external system validate the transactions

HMMS sends the required issue/transfer validation data to the external system as per a defined schedule. This allows the external system to validate every hazmat issue and transfer to ensure the employee is allowed to purchase and take the hazardous material to specified zones at the facility. The external system can stop the sale of a hazmat if any of the HMMS provided validation fails. Only successfully validated hazmat will be sold and then sent to HMMS via the batch interface on a predefined schedule.

External Inventory DSS Screen Overview

This interface allows sites to automatically receive a hazardous material inventory from an external source, Distribution Standard System (DSS) into HMMS. This allows hazardous material inventory tracked outside of HMMS to be included in the site's EPCRA Tier II reports. The interface allows users to filter and view transactions, sort results, and print and export inventory information.

Note: The Distribution Standard System (DSS) is an automated information system that manages all functional business processes of the DoD warehouse operations.

DATA COLLECTOR INFORMATION

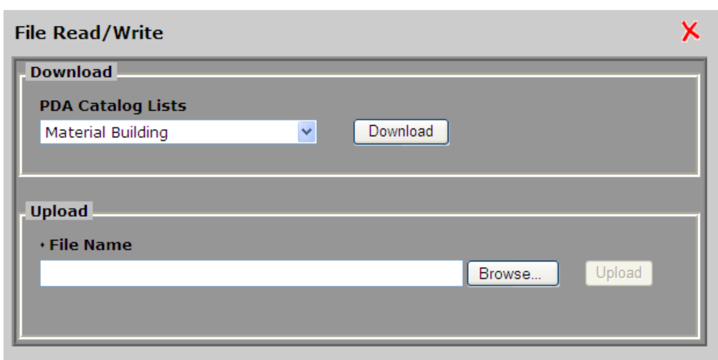
Data Collector Screen Overview

The *Other Functions/Hand-Held Devices/Data Collector* screen is used to download data that has been collected on a hand held device. To use this screen you must have a hand held device connected to a PC with a with the correct sync interface.

There are nine transaction types you can perform from this screen, both material and waste.

Transferring LOV Data to the Hand Held Device

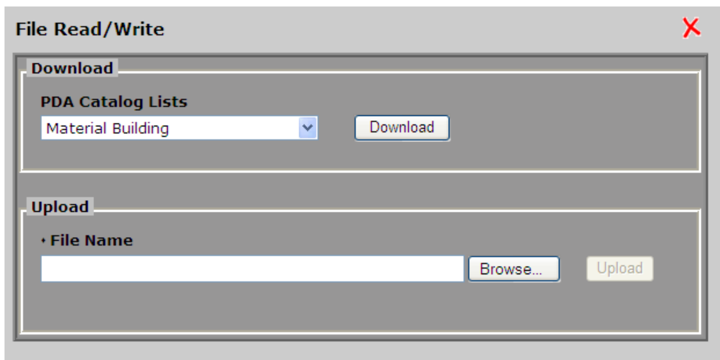
1. With the Data Collector Device in the cradle.
2. Open the *Other Functions/Hand-Held Devices/Data Collector*
3. Click the Sync button on the top of the screen.
4. The File Read/Write screen will open.



5. Select the PDA Catalog List from the drop down arrow.
6. Click the Download Button.
7. Select the Save Button on the File Download Dialog box.
8. Select the hmmsdatabase folder on the hand held device.
9. Repeat steps 5 through 8 until all required LOV data has been loaded to the PDA.
10. Once all LOV lists have been downloaded the device is ready to be uncradled and used.

Transferring Data from the PDA to HMMS

1. With the Data Collector Device in the cradle.
2. Open the *Other Functions/Hand-Held Devices/Data Collector*
3. Click the  Sync button on the top of the screen.
4. The File Read/Write screen will open.

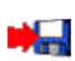


5. Click the Browse button to navigate to the hmmsdatabase folder.
6. Select the .pdb file containing your scanned data and clock the Open button.
7. Click the Upload Button.
8. Repeat steps 5 through 7 until all required data has been uploaded to HMMS.
9. Once the file is uploaded into HMMS, the system will validate the data before the data enters the database. Refer to Resolving Data Conflicts for more information.

   NOTE: If you are using the HTTP Transfer protocol refer to the Data Collector User guide for specific instructions.

Resolving Data Conflicts

When data is transferred to HMMS from the PDA, the system validates the data. If there are any errors in the data, the error will show in the appropriate Data Collector Child record. Remember only the data that failed the validation will show in this screen.

1. Open the *Other Functions/Hand-Held Devices/Data Collector.*
2. Select the child record for the transaction performed.
3. Review the message in the data record.
4. Resolve the data problem.
5. Click the  Save icon.

Deleting Data from the Data Collector

1. Open the data collector application
2. Click Delete Records button.

   Warning: Be sure that the data you are deleting has been transferred in HMMS. If not, your data will be lost.
3. Tap Y to confirm the deletion of the records.

MISCELLANOUS INFORMATION

Reports Screen Overview

The *Reports and Analytics/Reports* screen is used to compile information that is stored in HMMS and place that information into a report. With a few clicks of the mouse HMMS provides you with a list of values to select a wide variety of comprehensive, up-to-the-minute reports. This screen has been enhanced to allow the user to select to run a report in the background. An indicator has been added to the screen, “Run Report in Background”. When selected, the user will receive a pop-up message indicating the report is running in the background. The pop-up message can be closed, and then the user can continue to utilize other parts of the application. When the report is complete, the user will receive a notification in the inbox.

To access the report, either click the notification or return to the Reports Screen and

Generating a Report

1. From *Reports and Analytics/Reports* select the *Report Category* you would like to generate the report from.
2. Select the *Report Name* from the list of values.
3. Click the Print icon. This action will open a new window.
4. From the new window select the parameters for the report you are generating. An example of this would be the *EPA ID* for the *Containers Awaiting Pickup* report.
5. Click the **Submit Query** button to generate the selected report or the **Reset** button to submit new entries.
6. The report displays in a new window. You can click the printer button on the browser window to print a copy of the report.

Retrieving a Report that was ran in the background.

1. Click on the Inbox Notification or navigate to the *Reports and Analytics/Reports* Screen.
2. The *Reports* Screen will open.
3. Open the child record Report Jobs.
4. Click on the hyper link to open the report.

Removing a Report that was ran in the background.

1. Navigate to the *Reports and Analytics/Reports* Screen.
2. Select the report to remove.

3. Click the delete icon. This will remove the report from the database, the child record and remove the inbox notification.

Note: To cancel a report job that has a status of "processing", select the report and click the delete icon.

Accessing Oracle Discoverer

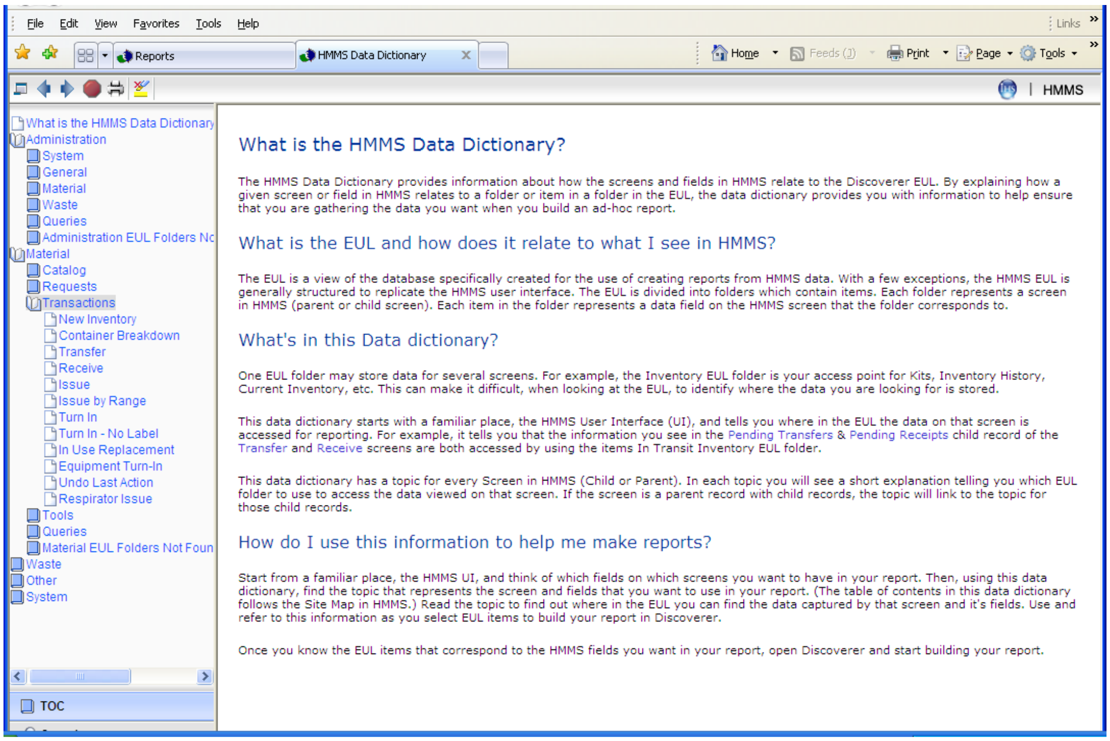
1. From *Reports and Analytics/Reports* select the *Oracle Discoverer* under Functions on the right side of the screen. This action will open a new browser window.

2. Click on the Create a Connection or Connect Directly link.
3. Log in to Discoverer using your HMMS user id and password.

Accessing Data Dictionary

The HMMS Data Dictionary provides information about how the screens and fields in HMMS relate to the Discoverer EUL. By explaining how a given screen or field in HMMS relates to a folder or item in a folder in the EUL, the data dictionary provides you with information to help ensure that you are gathering the data you want when you build an ad-hoc report.

1. From *Reports and Analytics/Reports* select the *Data Dictionary* link under Functions on the right side of the screen. This action will open a new browser window with the Data Dictionary displayed.



Tier Two Report Screen Overview

The *Reports and Analytics/Tier Two Report* screen is used to automatically generate a Tier Two report using data in HMMS.

Generating a Tier Two Report

1. Open the *Reports and Analytics/Tier Two Report* screen.
2. Select the type of report you want to generate in the *Report Type* field.
3. In the *Start Date* and *End Date* fields enter the beginning and ending dates from which you want to collect data.
4. Click the  icon. The report will generate in a different browser window. To print the report, select *File/Print* from the browser window.

TRI Worksheet Screen Overview

The *Reports and Analytics/TRI Worksheet* is a specialized HMMS report that will pull information from HMMS to show the volumes of chemical inventory and chemical waste on your site for a given date range. This worksheet will help you gather the information needed to file you TRI Form R.

Generating a TRI Worksheet

1. Open the *Reports and Analytics/TRI Worksheet* screen.
2. Enter the +*Start Date* and the +*End Date.*
3. Click the Print icon.
4. Click either the Open or Save button on the File Download pop-up.

Material Expiration Dashboard

The *Reports and Analytics/Material Expiration is a* dashboard report. This screen will show that statistics for Expired material.

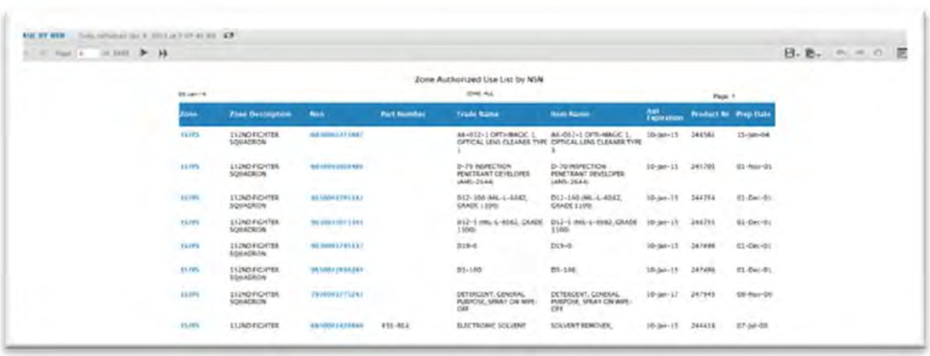
1. Open the *Reports and Analytics/Material Expiration screen.*
2. The HMMS Dashboard will open; on the left side of the dashboard will be the Material Expiration Settings section.
3. Select the Issue Point to be viewed by typing in or selecting from the Issue Point LOV. The default choice is "All".
4. Change the criteria for the Yellow section of the chart. The value shown for the Green will automatically adjust based on the selection made for the yellow.
5. Select the Display Type for the chart, 3D Pie or 3D Bar.
6. Click the Save button to save the selected settings.
7. Click the Draw Chart button to display the chart.
8. The Material Expiration chart will display in the style selected on the right side of the screen.
9. Click on one color selection of the chart, the report will open showing the specific details for that section.


Material Expiration Report

AUL Report Dashboard

The *Reports and Analytics/ AUL* is a dashboard report. This screen will show the AUL for the selected Zone.

1. Open the *Reports and Analytics/ AUL screen.*
2. The HMMS Dashboard will open; on the left side of the dashboard will be the AUL Filters section.
3. Select the Zone to be viewed by typing in or selecting from the Zone LOV. The default choice is “All”.
4. Click the Include Product/MSDS check box if the Product Nr is to be included in the report.
5. Click the Apply Changes button.
6. The Zone Authorized Use List report will display on the right side of the screen.



AUL Usage Report Dashboard

The *Reports and Analytics/ AUL Usage* is a dashboard report. This screen will show the AUL Usage for the selected Zone, for the selected period.

1. Open the *Reports and Analytics/ AUL Usage screen.*
2. The HMMS Dashboard will open; on the left side of the dashboard will be the AUL Usage Filters section.
3. Select the Zone to be viewed by typing in or selecting from the Zone LOV. The default choice is “All”.
4. Select the Start Date.
5. Select the End Date.
6. Click the Apply Changes button.
7. The AUL Usage report will display on the right side of the screen.

Haps Report

The *Air/Haps Report* is used to generate a Haps Report using data from HMMS and/or OpsAir.

Running Haps Report

1. Open the *Reports and Analytics/Air/Haps Report* screen.
2. Enter the From and To dates in the Search block.
3. Select the data source by check either the HMMS or OpsAir checkboxes. You can select either or both.
4. Click the Display Data button.
5. The data will show in the in the HAPS Emissions for Misc. Material Usage area.
6. To compare several date ranges check the Compare Dates checkbox.
    i. Enter the From and To dates in the Search block.
    ii. Select the data source by check either the HMMS or OpsAir checkboxes. You can select either or both.
    iii. Click the Display Data button.

Setting Exemptions

1. With the Haps Report displayed.
2. Select a Saved Exemption by clicking the Exemptions Dropdown and click on required exemption.
3. To create a new exemption, select the appropriate dropdown/s for the exemption/s you want to apply.
4. To apply an exemption based on a NSN, type the NSN in the NSN field.
5. Click the appropriate button, Display Exemptions, or Apply Exemptions
6. To save the exemption, click the Save Exemptions button.
7. To delete the exemption, click the Delete Exemptions button.

Exporting the Report

1. With the Haps Report displayed.

2. Click the Excel icon to export as an Excel spreadsheet.
3. Click the Adobe PDF icon to export as a PDF.
4. Click the Open button on the dialog box to open the file.
5. Click the Save button on the dialog box to save the file for later use.
6. Click the Cancel button on the dialog box to cancel the export.

VOC Report

The *Air/VOC Report* is used to generate a VOC Report using data from HMMS and/or OpsAir.

Running VOC Report

1. Open the *Reports and Analytics/Air/VOC Report* screen.
2. Enter the From and To dates in the Search block.
3. Select the data source by check either the HMMS or OpsAir checkboxes. You can select either or both.
4. Click the Display Data button.
5. The data will show in the in the VOC Emissions for Misc. Material Usage area.
6. To compare several date ranges check the Compare Dates checkbox.
    i. Enter the From and To dates in the Search block.
    ii. Select the data source by check either the HMMS or OpsAir checkboxes. You can select either or both.
    iii. Click the Display Data button.

Setting Exemptions

1. With the VOC Report displayed.
2. Select a Saved Exemption by clicking the Exemptions Dropdown and click on required exemption.
3. To create a new exemption, select the appropriate dropdown/s for the exemption/s you want to apply.
4. To apply an exemption based on a NSN, type the NSN in the NSN field.
5. Click the appropriate button, Display Exemptions, or Apply Exemptions
6. To save the exemption, click the Save Exemptions button.
7. To delete the exemption, click the Delete Exemptions button.

Exporting the Report

1. With the VOC Report displayed.
2. Click the Excel icon to export as an Excel spreadsheet.
3. Click the Adobe PDF icon to export as a PDF.

4. Click the Open button on the dialog box to open the file.
5. Click the Save button on the dialog box to save the file for later use.
6. Click the Cancel button on the dialog box to cancel the export.

Generate Labels Screen Overview

The *Reports and Analytics/Bar Code Labels/Generate Labels* screen and its associated screens are used to print a variety of barcodes that can be used in a wide range of settings to speed the collection of data. For example, you can print a set of barcodes with all the processes associated with an issue point. When issuing material you can then scan the barcodes rather than manually entering the data into the *Process* field on the *Material Issue* screen.

Printing a Generic Barcode

Note: Generic barcodes are different than others available in this screen. With all other print barcode screens you can select the data that will be printed on the barcode. In this screen you can enter any text you like and have it printed in barcode format.

1. Open the *Reports and Analytics/Bar Code Labels/Generate Labels* screen.
2. Enter data in the fields on the screen.
3. Click the Save icon. After you do, another browser window will appear. In it will be the barcode you want to print.
4. Click *File/Print* from the browser menu bar to print the barcode.

Printing Specific Bar Code Labels

1. Open the *Reports and Analytics/Bar Code Labels/Generate Labels* screen.
2. Select the type of barcode you want to print by clicking on the link on the right side of the screen.
3. Select or enter the data you want to appear in the barcode.
4. Click the Save icon. After you do a new browser window will appear. In it will be the barcode you want to print.
5. Click *File/Print* from the browser menu bar to print the barcode.

EXERCISES

Exercise # 1 – Material Inventory

1-1 Create New Inventory

1. Go to **Material Functions/Transactions/New Inventory**.
2. Select a Issue Point from the LOV (write it down to use it through all the exercises)
3. Using this MSDS number, create 3 containers of new inventory
4. Be sure to enter the lot batch number and expiration date. (You can make them up as you go.)
5. Print the tracking labels for this material by committing this transaction.
6. **Write down the serial numbers that were created before you exit this screen.**
7. Click the Yellow Back Arrow.
8. Return to Site Map.

1-2 Reprinting Labels

1. Go to **Material Functions/Tools/Reprint Labels**.
2. Reprint labels for the three serial numbers you created above.
3. Click the Green Plus Icon
4. Return to Site Map.

1-3 Delete Inventory

1. Go to **Material Functions/Tools /Delete Inventory**.
2. Delete the first serial number you created above.
3. Return to Site Map.

1-4 Inventory Breakdown

1. Go to **Material Functions/Transactions/Inventory Container Breakdown.**
2. In the issue point from the earlier exercise, breakdown the second serial number from above.
3. Break the material into five five-gallon containers.
4. Print the labels by committing this record.
5. Click the Yellow Back Arrow
6. Return to Site Map.

Exercise # 2 - Kits

2-1 Kit Definition

1. Go to **Material Functions/Tools/Kit Definition**.
2. Click the new icon
3. Define a kit using your last name.
4. Make this kit **manufacture**, and **non-separable**.
5. Click the Save Icon
6. Open the Component child screen
7. Click New record icon
8. Add any two MSDS's from the List of Values
9. Click Save

2-2 Kit Definition Separable Kit

1. 1.Go to **Material Functions/Tools/Kit Definition**
2. Click New Icon
3. Create a Site Defined separable kit using your last name and the number 1.
4. Click Save

2-3 Kit Build Break

1. Go into **Material Functions/Tools/Kit Build Break**.

2. Click the new icon
3. Create a new separable kit using the id created in exercise 5-2
4. Use the Issue Point from above.
5. Click Save
6. Add any two serial numbers from the List of values
7. Click Save
8. Return to Site map.

Exercise # 3 - Issue/Turn-In

3-1 Issue Materials

1. Go into the **Material Functions/Transactions/Issue** screen
2. In the issue point from above**,** to this employee ID

3. Issue this serial number

4. Click save
5. Return to Site Map

3-2 Turn In Materials

1. Go to the **Material Functions/Transactions/Turn in**.
2. Turn in the serial number you issued above as **empty.**
3. Click Save.
4. Return to Site map.