Environmental > Strategic Services

Hazardous Materials Management System (HMMS)

Material Training Manual

The Source
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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.com 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.

Issue Point & Receiving Functions

Issue Point (IP) operators typically perform the following tasks:

1. Material tracking bar code labels that include very basic health hazard information are printed. These labels are attached to hazardous material containers for visual indication of hazard levels by the work force.
2. When an employee requests a material, the IP operator scans in the barcode from the material tracking label, enters the employee's identification (ID) number, the employee's zone.
3. The HMMS software then checks that the employee is in the proper zone, that the zone is licensed to use the requested material, and that the employee is assigned to that supervisor.

4. Upon approval, the IP operator issues the material to the employee, the system records the issue and/or denial in the data base.
5. At later dates, material usage/denial reports can be generated based upon this information.

Material is audited at sites based upon the MSDS information created, hazardous material training categories determined, and zones for hazardous materials identified and licensed. Information such as employee assignment, respirator fit test, and material training will need to be added to the database.

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.

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. 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.

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 on 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 (• Collection Site)

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.

Fields with an LOV entry icon ( )

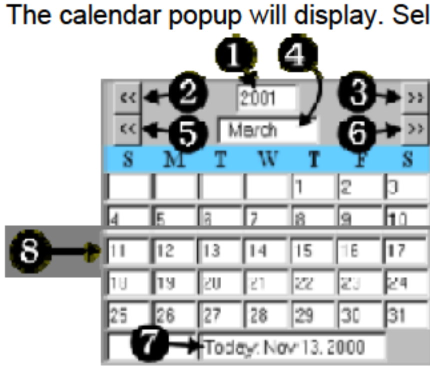
Click the icon to display a list from which you can choose an item. Additionally, you can type data directly into the field. In some instances the text you enter will be added to the list that displays the next time you use the field.

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

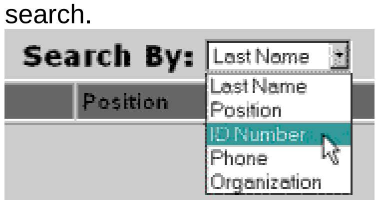
Querying is used to look up information in HMMS. Once the records are retrieved, they can be reviewed, modified, or deleted. Since there can be literally tens of thousands of records to review a quick way of finding the records you need is critical.

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. Although these instructions use the *Employee Screen* as an example, they will also work for all screens.

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



In screens without a selectable *Search By* field, the search is conducted by the criteria displayed on the screen.

Search By: List Name

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

- Click the GO! 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.
  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.
- After entering the search criteria, click the GO! icon.

The second 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.

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.

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. 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.

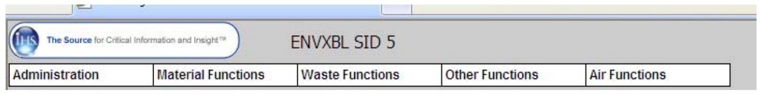
Menu Overview

The Menu allows you to navigate quickly between screens without having to go to the Site Map screen each time. The menu consists of four drop down lists of the screens you have available to use and is located at the top of the HMMS screen.

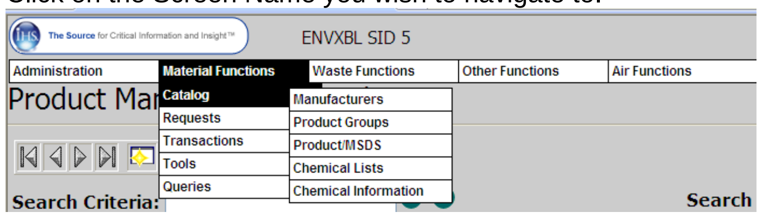
Items included in the Menu are the same as what is available on your site map.

Using the Menu

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



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



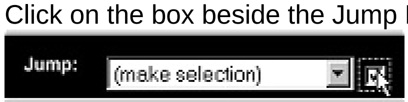
Jump Menu Overview

The Jump Menu allows you to navigate quickly between screens without having to go to the Site Map screen each time. The jump menu 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 Jump Menu are saved on an individual user basis; the Jump Menu items that display in the drop down list are those the user who is logging in has entered.

Adding a Screen to Your Jump Menu List

1. Navigate to a screen you want to add to the Jump Menu using the Site Map. If the screen does not appear on the site map you see you cannot add it to your Jump Menu.
2. Click on the box beside the Jump Menu selection box.



3. The next time you need to navigate to the screen it will appear in your Jump Menu. The screen name that you added will be entered into the list in alphabetical order.

Navigating to a Screen Using the Jump Menu

1. From any screen in HMMS click the down arrow beside the jump menu selection field at the top of the screen.

2. Select the screen for your jump menu list.

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

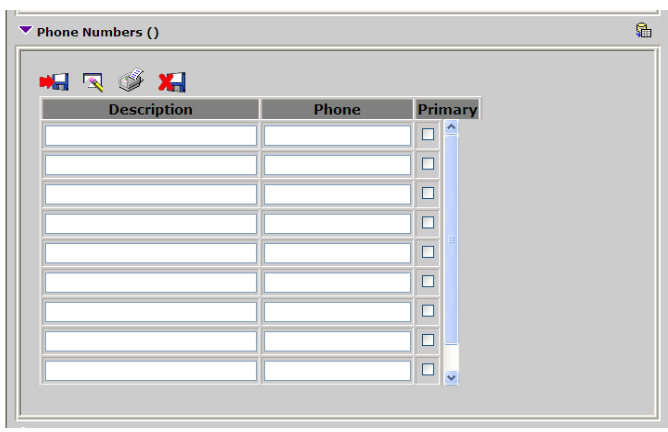
Deleting a Screen from Your Jump Menu

1. Navigate to the screen using either the Site Map or the Jump Menu.
2. Deselect the box beside the Jump Menu selection box.

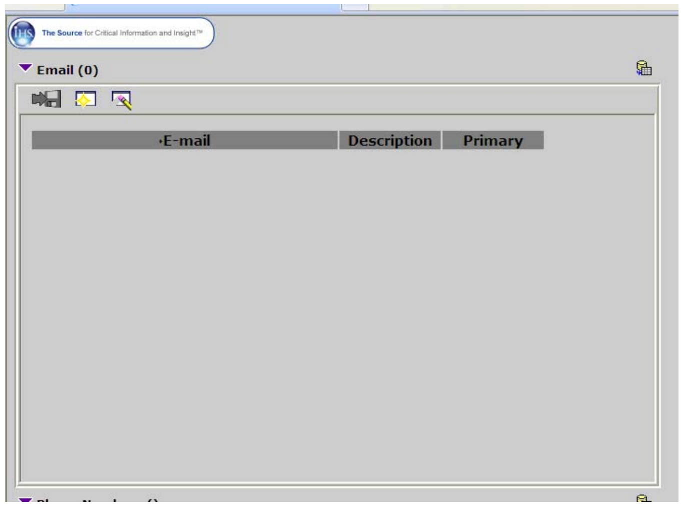
The screen name will be removed from the Jump Menu list.

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  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

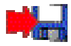
1. Open the child screen in which you want to enter a record.
2. Click in a row without data in it or click the New Record icon.
3. Enter the data in the fields.
4. Click the icon.

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 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  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  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*.

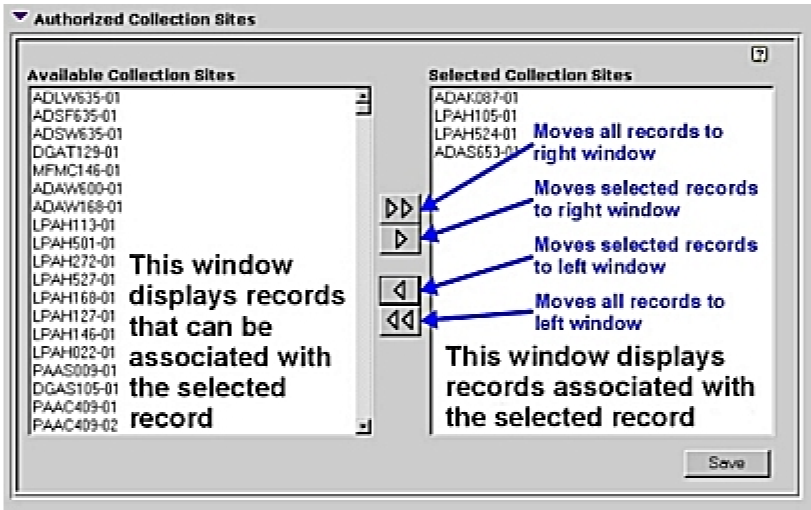
Using Multi-select Style Child Screens

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 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.

Click to delete the selected record.

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.

Cancels the changes to the current record. Will not undo changes you have already saved.

Displays help for the current screen.

Displays a preview of the selected record. You can then print a hard copy page by selecting File/Print from the browser menu bar.

Print the current page of the selected query.

Prints all of the pages of the selected query.

Displays a list of values for the selected field. Different than the one above in that you can enter freeform text in this type.

Displays a calendar with which you can enter a date.

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.

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 the next page of returns for the query.

Displays the last page of returns for the query.

In multi-select child screens click to move all records from the right window to the left window.

In multi-select child screens click to move all records from the left window to the right window.

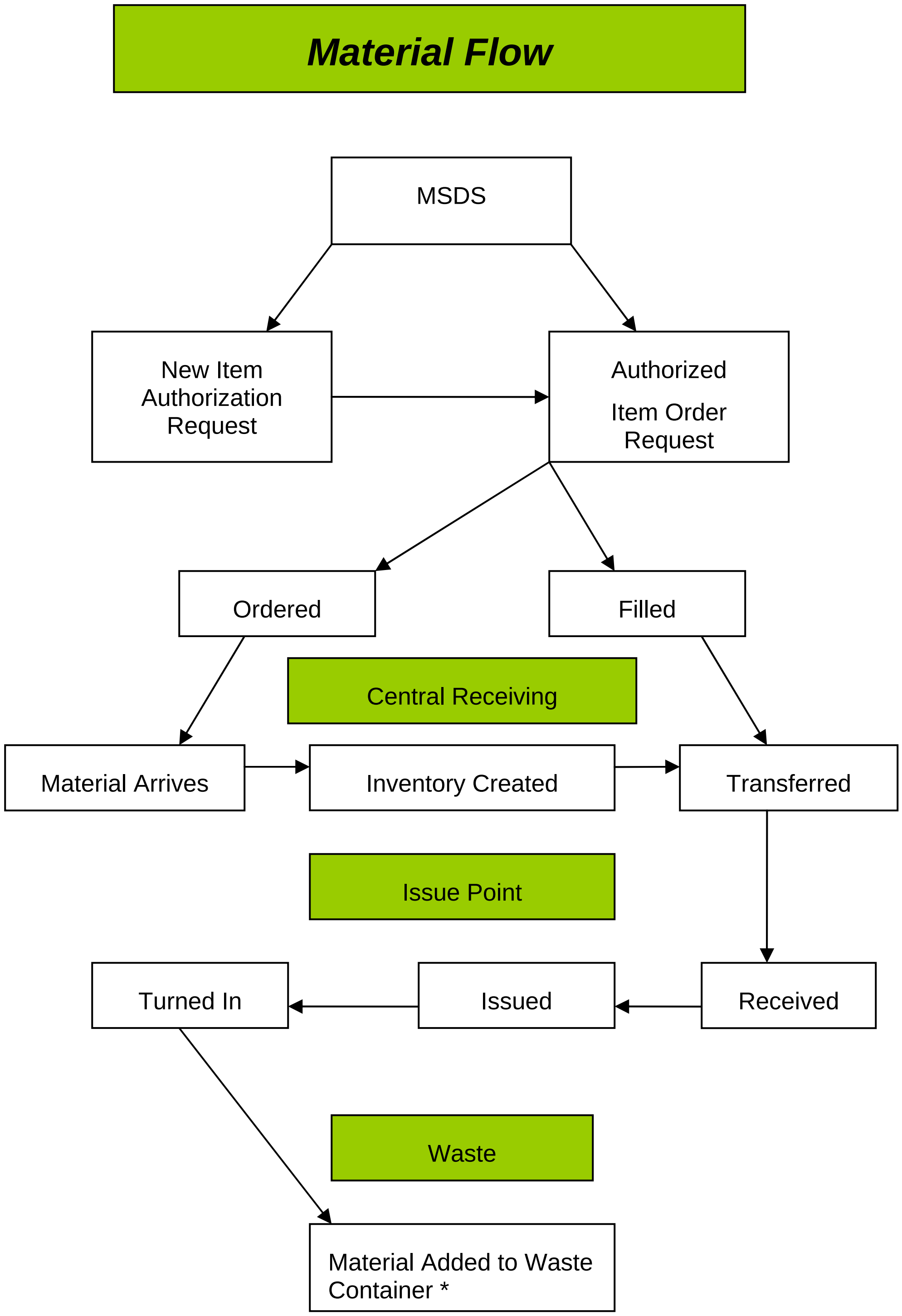

Refreshes the current screen.


Displays the waste profile for the current record.


Displays a list of containers associated with the current record.

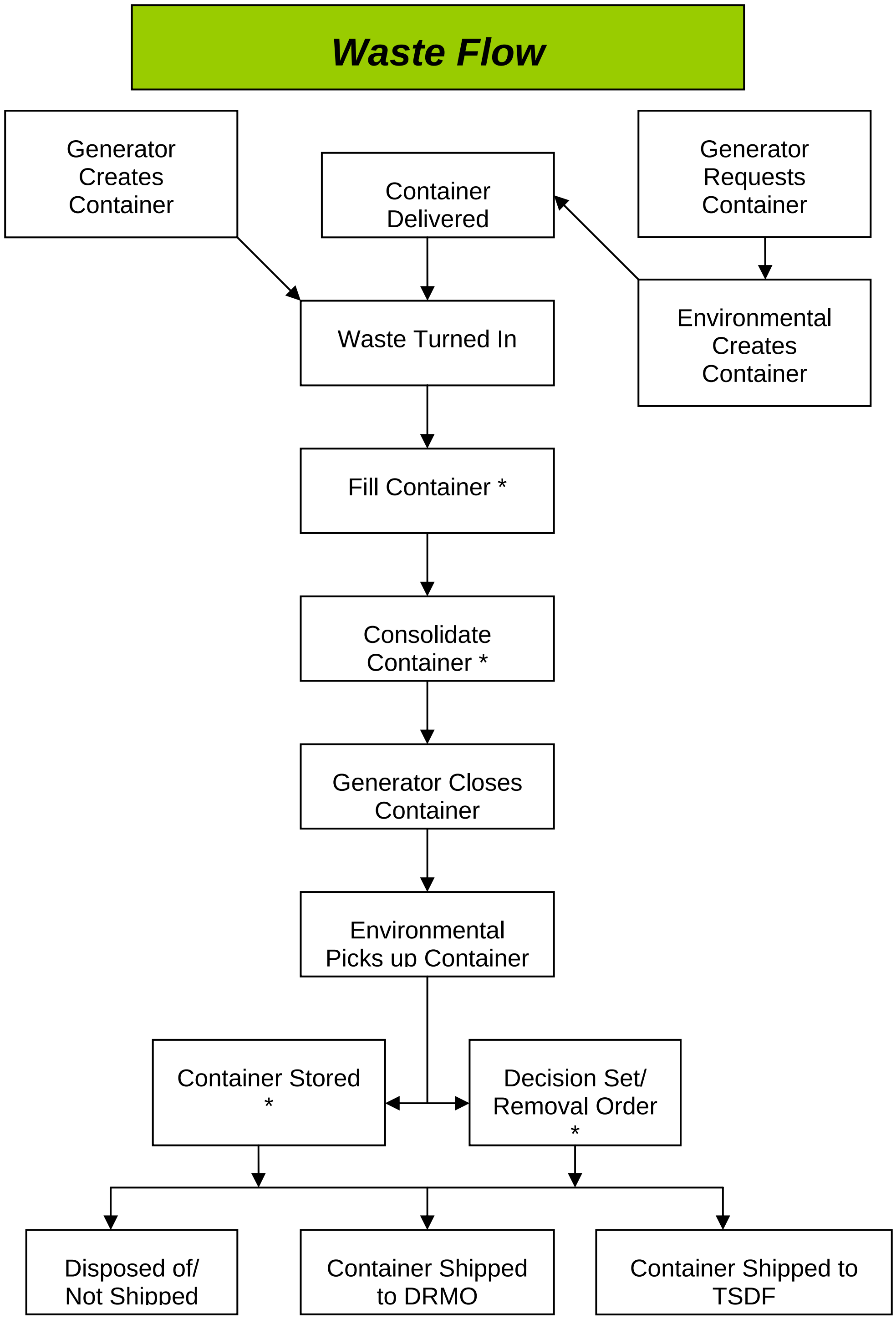
Flow of Material through HMMS

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. Asterisks indicate the step is optional.

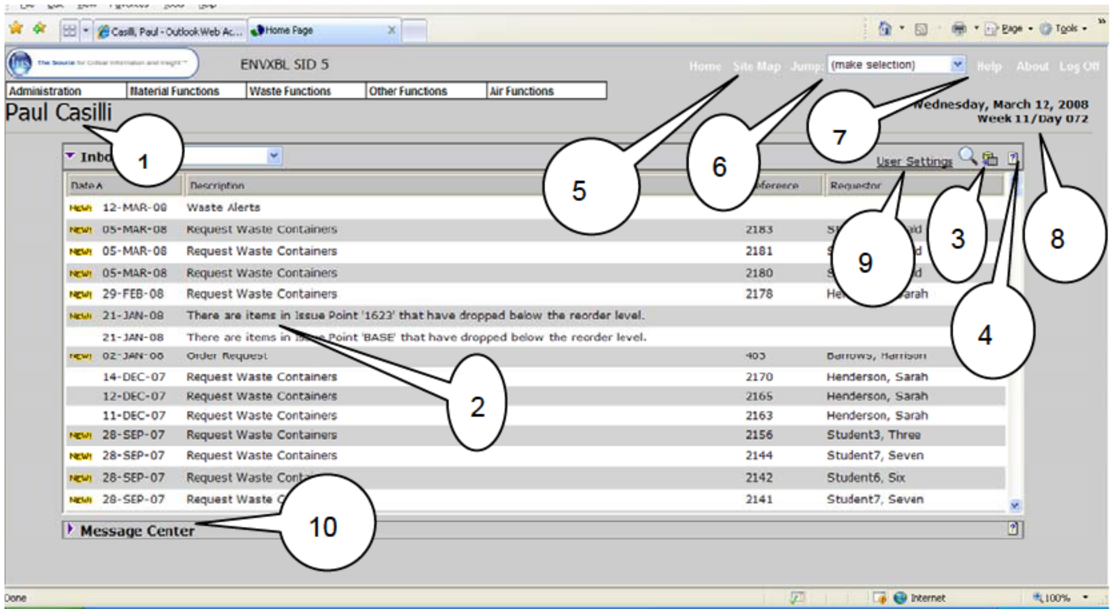

Material Flow
MSDS
New Item Authorization Request
Authorized
Item Order Request
Ordered
Filled
Central Receiving
Material Arrives
Inventory Created
Transferred
Issue Point
Turned In
Issued
Received
Waste
Material Added to Waste Container *

Flow of Waste through HMMS

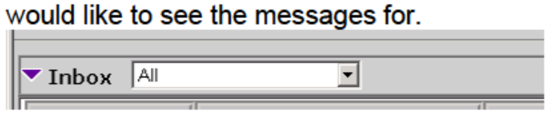
The following graphic provides a reference to visualize how HMMS tracks the flow of waste through an installation. From the time it is turned in through disposal. Asterisks indicate the step is optional.


Waste Flow
Generator Creates Container
Container Delivered
Generator Requests Container
Waste Turned In
Environmental Creates Container
Fill Container *
Consolidate Container *
Generator Closes Container
Environmental Picks up Container
Container Stored *
Decision Set/ Removal Order *
Disposed of/ Not Shipped
Container Shipped to DRMO
Container Shipped to TSDF

Home Page Tutorial



1. The name of the user logged in to HMMS.
2. The messages tasked to the logged in user.
    - 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.



3. Click this 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.

4. Click to open a new screen with help for the *Inbox* screen.
5. Click the "Site Map" text to navigate to the site map that displays all the HMMS screens to which you have access.
6. The Jump menu helps you quickly navigate to screen that you use often.
7. Click to access help for those HMMS system screens to which you have access.
8. Identifies the current date.
9. User settings gives you an opportunity to change your configuration, everything from the manner in which HMMS displays on the screen to email addresses.
10. Message Center provides a way to send and receive messages to other HMMS users in your system.

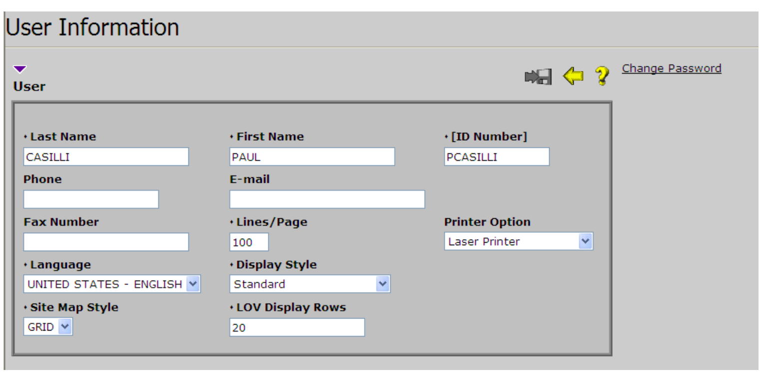
Customizing Your Home Page Overview

The HMMS *Home* page *User Settings/User Information* is where you customize your page settings. From this screen you can select from numerous *Display Styles* anything from *Standard* to the *Desert Sand* style. Remember to insure all required fields have information. The administrator might not have set the Lines per Page and the LOV Display Rows.

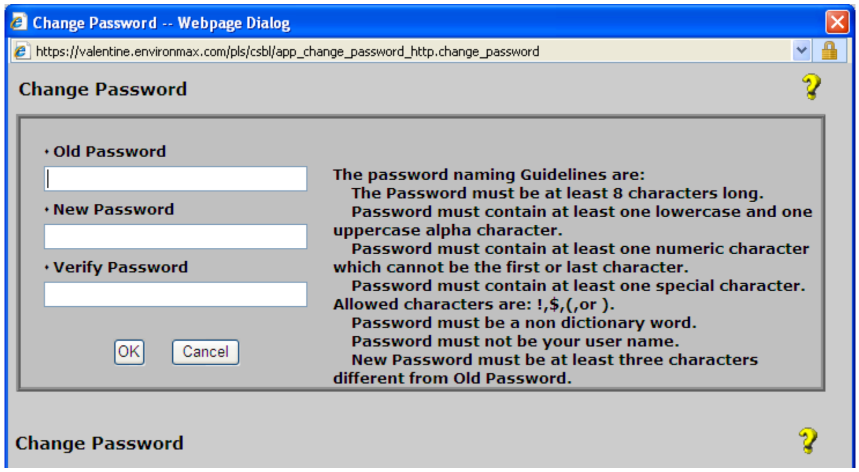
The *User Information* screen also contains three child grid type screens, *Email, Phone Numbers* and *Addresses* these screens allow you to build a personal list contacts.

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..

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 as you would ordinarily. After you finish with it, close the browser window.

Message Center Overview

The *Message Center* is used to send messages with HMMS since there is no Outlook or other external email integration at this time. The messages can be sent from person to person, person to group, or person to all other users of HMMS at the facility. Examples of the 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.

Reports Screen Overview

The *Administration/General/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.

Generating a Report

1. From *Administration/General/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 browser window.
4. From the new browser window select the parameters for the report you are generating. An example of this would be a *Start Date (DD-MM-YYYY), End Date (DD-MM-YYYY)* and *EPA ID* for the *Alert - 3 Day Rule* 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.

Accessing Oracle Discoverer

1. From *Administration/General/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 icon.
3. Log in to Discoverer using your user id and password.

MATERIAL 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.

Note: If the CAGE code is unknown the user may search for a CAGE Code on the following website: https://www.bpn.gov/bincs/begin_search.asp.

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

Entering a Product Manufacturer

1. Open the *Material Functions/Catalog/Manufacturer* screen.
2. Click the New icon.
3. Enter the following fields:
   a. *+CAGE* – the identifying code assigned to the manufacturer by DLA.
   b. *+Manufacturer Name* – name of the manufacturer.
   c. *+City* – city the manufacturer is located.
   d. *+Country* – the country where they are located.
4. Enter the following optional fields:
   a. *Address* – address where the manufacturer is located.
   b. *State/Province* – state the manufacturer is located in.
   c. *Zip Code* – the mailing zip code for the manufacturer.
   d. *Emergency Phone* – the phone to contact in case of an emergency.
   e. *Phone* – the phone to contact if you have questions.
5. Click the Save icon. After you do, you will see the *Maintain Product Manufacturer* screen.

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 manufacturer you cannot delete the record.

3. Click the Yes button on the confirmation screen.

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, the codes can be assigned 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 that 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.

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 to identify like products
    b. *+Description* – the description of the products
    c. *SLED Exempt* check box – indicates that the products are exempt from the shelf life program
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 is no delete icon, you cannot delete the record since there is history tied to 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 the Yes button on the confirmation screen..

Product/MSDS Screen Overview

The *Material Functions/Catalog/Product/MSDS* screen is used to electronically store all the Material Safety Data Sheets (MSDS) a facility receives from the manufacturer. MSDS's serve as a guideline for chemical usage, storage, and hazards. The Product Number that is referred to in this screen is also known as the MSDS number. 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 MSDS for each container size, the user can add container sizes to one MSDS or product. Other child records are the Vendor record and the Ingredients record where the Chemical CAS numbers pertaining to that product are stored

Additional Information

HMMS Product/MSDS screens are used to:

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

Prerequisites

Manufacturers and *Product Groups* must be set up before products can be entered.

Entering a Product/MSDS

1. Open the *Material Functions/Catalog/Product-MSDS* screen.
2. Click the New Record icon.
3. The *New Identification* screen of the Product Setup will open.
4. Enter the following fields:
   a. +*Group Code* – code to identify a group of products

b. *+MSDS Prep Dt* – The date the manufacturer's msds was prepared.

c. *+CAGE* – Code assigned by DLA to identify the product manufacturer.

d. *+Item Name* – Name of product.

e. *+Trade Name* – Trade name of product, could include part numbers.

f. *+Calc Specific Gravity* – the specific gravity of the product.

g. *+NSN* – National Stock Number

h. *+PNI* – Part Number Indicator, Part 1 would be "A" part 2 would be "B".

5. Enter the remaining optional fields:

   a. *Hazard Code* – A code assigned to the product to identify the relative danger of the product.

   b. *CTS Code* – site defined Chemical Tracking system code.

   c. *Specification Number* – the specification of the material.

   d. *Specification Type/Grade/Class* – further description of the type of material

   e. *UPC Code* – Universal Product Code that identifies the material.

   f. *SKU Number* – Stock Keeping Unit number of the item.

   g. *Mfg Part Number* – the part number the manufacturer assigns to a product.

   h. *Container QTY* – the size of the container, i.e. 1, 12, 16

   i. *Container Size UOM* – container unit of measure, i.e. quart, gallon, fluid ounces, etc.

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

   k. *Unit Price* - the price of one item

   l. *Container Type* – what type container the material is supplied in. The default is Above Ground Tank. Make sure you select the correct container type.

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

6. Click the Save icon.

7. After you do, the *Product/MSDS Information/Identification* screen will open. There are 5 child records that can have additional data. There are also 14 page links on the right side of the screen. Fill in the information as needed. Remember to click on the Save icon after each screen. For further information refer to the MSDS Data Entry manual.

Modifying a Product/MSDS

1. Open the *Material Functions/Catalog/Product-MSDS* screen.
2. Query to find the record of the material you want to modify.
3. Click the Edit icon beside the record you want to modify.
4. Make the changes to the fields as necessary. There are some fields you will not be able to change. These fields are identified by the **[ ]** brackets around the field names. This ensures accurate historical reporting.
5. Click the Save icon.

Duplicating a Product/MSDS

1. Enter the *Material Functions/Catalog/Product-MSDS* to open the *Product Search* screen.
2. Query to find the MSDS of the material you want to duplicate.
3. Click the Edit icon beside the record you want to duplicate.
4. In the Product/MSDS child record highlight the record to duplicate by clicking on the record.
5. Click on "Duplicate Product/MSDS" icon at the top of the Product/MSDS child record.
6. The Duplicate Product/MSDS screen appears. Make the necessary changes to the *+MSDS Prep Dt, +CAGE, +NSN,* and *+PNI* fields.
7. Click the Save icon.
8. 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 page (16: Other) needs to change, specifically the *MSDS Prep/Review Date* field. Remember to click the Save icon on each screen that data was changed.

Printing a Product/MSDS

Note: This is the MSDS information that was entered into HMMS.

1. Open the *Material Functions/Catalog/Product-MSDS* screen.
2. Query to find the record of the material you want to print.
3. On the Search screen, click the Print Current Record icon. The MSDS record will appear in a separate browser window.

OR

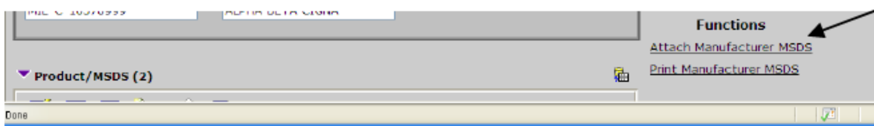
4. Click the Edit icon beside the record of the MSDS you want to print.
5. In the *Product/MSDS* child record highlight the *Product/MSDS* to be printed by clicking on the record
6. Click the Print Current Record icon. The MSDS record will appear in a separate browser window.
7. Select **File/Print** from the browser menu bar. The MSDS will print from the current printer.

Attaching a Manufacturers' Provided MSDS

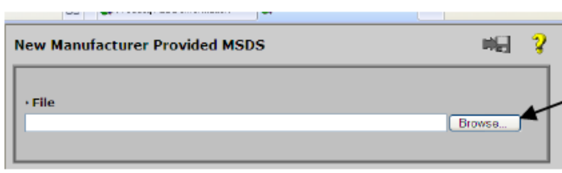
Prerequisites

The Manufacturer's Provided MSDS must be in an electronic format.

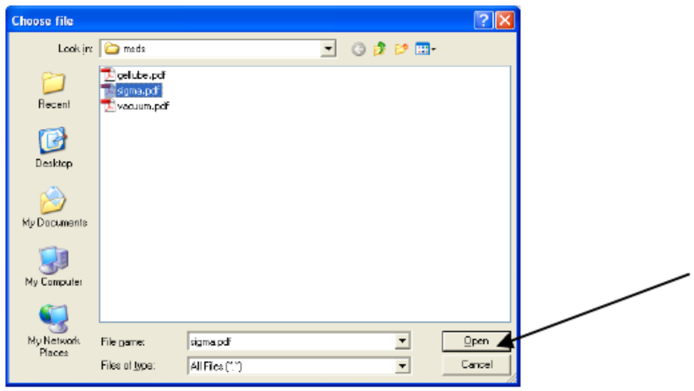
1. Open the *Material Functions/Catalog/Product-MSDS* screen.
2. Query to find the record of the material you want to add the Manufacturers MSDS.
3. Click the Edit icon beside the record you want to add the Manufacturers MSDS.
4. Click on the Attach Manufacturers MSDS link under the Functions heading.



5. Click on the Browse Button



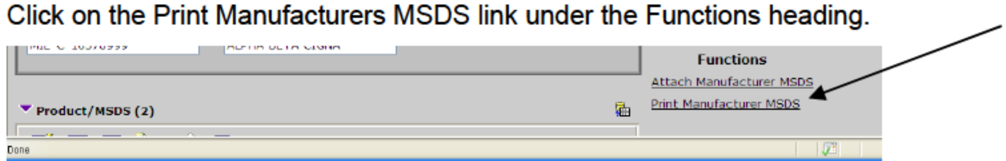
6. Navigate to the location of the MSDS image.



7. Click on the Open Button.
8. Click the  Save icon.
9. Verify the attachment using the child record Manufacturer Provided MSDS.

Printing a Manufacturers' Provided MSDS

1. Open the *Material Functions/Catalog/Product-MSDS* screen.
2. Query to find the record of the material you want to print.
3. Click the  Edit icon beside the record of the MSDS you want to print.
4. Click on the Print Manufacturers MSDS link under the Functions heading.



5. The Manufacturers Provided MSDS will appear in a separate browser window.
6. Select **File/Print** from the browser menu bar. The MSDS will print from the current printer.

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.

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 screen.

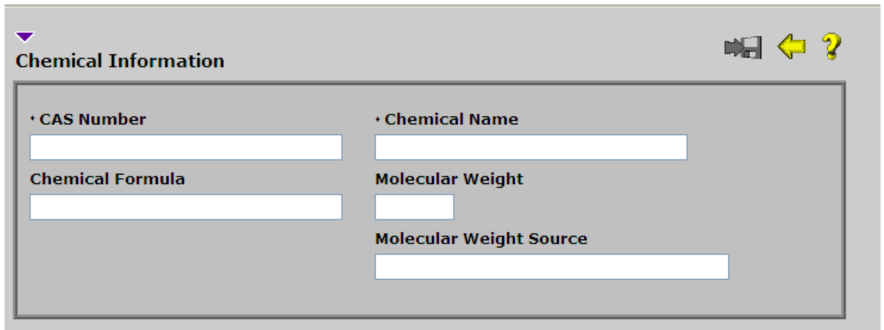
Chemical Information Screen Overview

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.

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 Number*
   b. *+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 auto-populate for the rest of the record.

   c. Click the Save icon.

10. The other two child records, High Water Mark and Site Storage Levels 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.

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 screen.

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

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-defined 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 STOP_NO_NSN 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 PROHIBIT_REQUEST_RESUBMIT parameter in the *Administration/System/Site Configuration* screen must be set to "Y".
3. If the PROHIBIT_REQUEST_RESUBMIT 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).

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, some thing 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 confined 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?
   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 step 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 step 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.

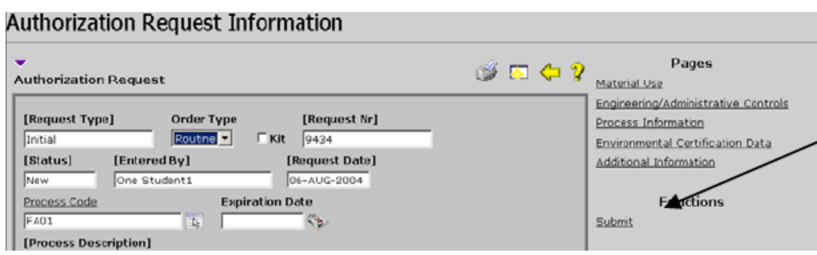
    a. Click the New icon at the top of the child section.

    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 step b until all applicable codes have been assigned.

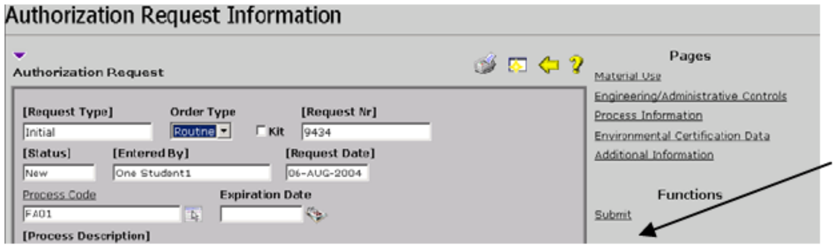
    d. Click on the Save icon at the top of the child section.

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 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, which will be covered later in this manual.

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.

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.

Reordering Screen Overview

The *Material Functions/Requests/Reorder Request* 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.
- 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.

Submitting a Reorder Request

1. Open the *Material Functions/Requests/Reorder Request* screen.
2. Click the New icon.
3. The *New Order Request* screen opens.
    a. Enter the +*Issue Point.*
    b. Enter the +*Zone.*
    c. Enter the +*NSN.*
    d. Enter the +*Quantity* required.
    e. Click the Save icon.
4. The Order Request form will appear.
5. 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.
6. Click the Submit link under the functions heading on the right side of the page.

Reviewing the Status of a Reorder Request

1. Open the *Material Functions/Requests/Reorder Request* screen.
2. Query for the reorder request for which you want to review the status

3. You can see 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 a Reorder Request

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

1. Open the *Material Functions/Requests/Reorder Request* screen.
2. Query for the reorder request you want to delete.
3. Click the Delete icon beside the record of the reorder 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.

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. *Vendor 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 can not 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 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.

Ordering Screen Overview

The *Material Functions/Requests/Order Request* 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 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.

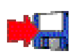
There are two other parameters that pertain to this screen:

- 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.
- 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.

Submitting an Order Request

1. Open the *Material Functions/Requests/Order Request* 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 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 see 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.

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.

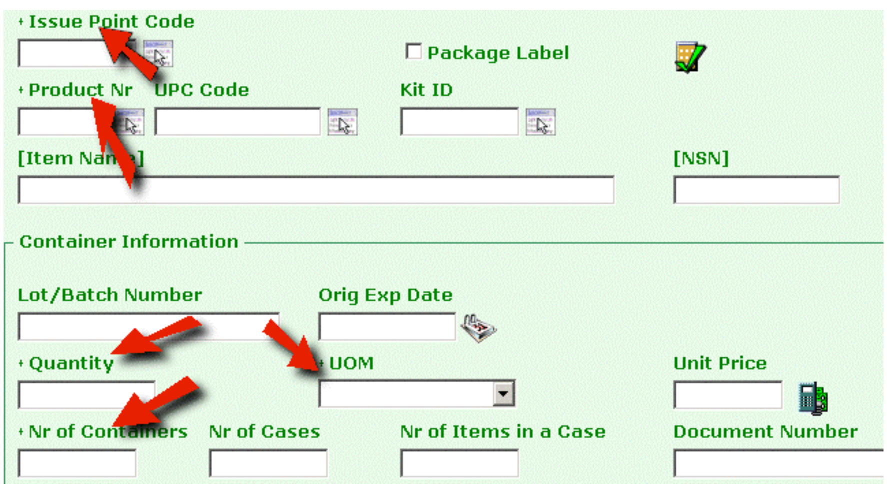
Creating New Inventory

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 *+Product/MSDS Nr* – if you know the number you can type the information in, if not select by clicking on the list of values icon.

   a. The *Find Product* screen appears. In the top half of the screen you will find the following fields: Mfg Part Number, Manufacturer Name, Item Name, NSN, Trade Name, and Specification Number.

b. Input one or more of the fields that you know.

c. Click the Search Button.

d. The Find Product Webpage Dialog window will open. Listing all material that matches the search criteria.

e. Select one by clicking on the line of data.

f. The bottom half of the screen is populated with the item you selected.

g. Click the select button. This will populate the information into the New Inventory Screen.

h. Input the *Lot/Batch Number*, ensure that you pay attention to the numbers and letters, “0” and “O” look very similar. As does the “5” and the “S”.

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

j. In the *+Nr of Containers* field input how many containers of material you have to create.

k. In the *Nr of Cases* field, if applicable, input the number of cases the material is in.

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

m. The following fields should auto-populate from the MSDS, if not select the appropriate value from the drop down list:

    i. *Unit of Issue*

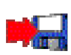
    ii. *Container Type*

    iii. *Pressure*

    iv. *State*

n. If applicable input or select the value for *Vendor Type and Inventory Condition.*

o. If applicable input the three digit code for the source of shipment for the material.

5. Click the  Save icon.

6. The *Created Serial Numbers* screen will display, with the serial numbers of the inventory items (and the case, if applicable) that were generated.

7. 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.

8. Click the  back arrow to continue to create new inventory.

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. There is no facility to assign a shelf-bin to new inventory in a different 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. Select the shelf-bin to which the material will be assigned in the *Shelf/Bin* field at the bottom of the *Container* block. You can click the Shelf/Bin icon to view locations within the issue point where similar inventory is stored.
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 Price Calculator icon. After you do, the *Unit Price Calculator* 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. Select the issue point to which the material will be assigned in the *Transfer Inventory* field at the bottom of the *Container* block by clicking on the Display List icon to the right of the data field.
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 New Inventory screen on the left side there is a check box that is labeled *Avl. For Offsite Trans.* Click in that box to make the inventory available for transfer to your partnered sites.

Printing Inventory Labels

Inventory tracking labels are printed on 3"x1" generic labels depending on the type of printer that is connected to the workstation. These labels will be generated after saving the New Inventory transaction.

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.*

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 items 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 needs 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.

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.

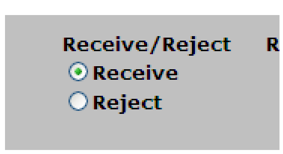
After inventory has been transferred, it must be received before it is issued out to an employee. The Receive Inventory screen allows for the issue point operator to physically account for the material that has been transferred to the issue point and record that data in the system, assigning it a shelf/bin, 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.

Receiving Inventory

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

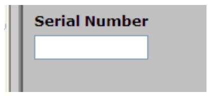
NOTE: Prior to selecting material to receive ensure that you have the material physically at the issue point.

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.
3. 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 four 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 Save icon.

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

Before you click the save Icon, click the View Pending Icon. This will ensure that the serial numbers in the Inventory Range Area and the Pending Receipts area match. Then you can click the Save icon.

   iii. The third way to use the screen is to click the View Pending Icon. Then open the *Pending Receipts* child section and selecting the items to receive in the *Select* field.

   iv. The fourth way to use this screen is to perform a Receive/Reject All. To perform this function first open the *Pending Receipts* child section, verify that all serial numbers listed have arrived at the issue point. Then click the Receive/Reject All icon.

c. Remember the above steps are the same for either Receiving or Rejecting material.

4. You can assign the items in the transfer you are accepting to shelf/bins by selecting a shelf/bin in the *Shelf Bin* field of the *Pending Receipts* child section.

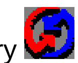
5. Click the Save icon.

6. You can print a record of the received materials by clicking the Print icon.

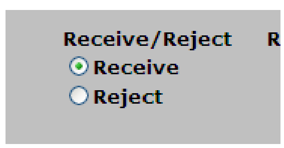
Receiving Inventory from an External Site

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 ensure that you have the material physically at the issue point.

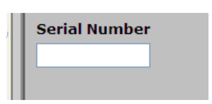
1. Open the *Material Functions/Transactions/Receive Material* screen.
2. Click on the Toggle External Inventory  icon.
3. The logged in user's default issue point record will appear in the + *Issue Point Code* field. If this is not the correct receiving issue point, select the proper issue point.
4. Receive or reject the transfer:

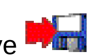
    a. Select either the Receive or Reject radio button. This selection will control if the material being selected on the receive screen is being accepted into the issue point or rejected back to the source.

    b. There are four 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 Save  icon.

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

Before you click the save Icon, click the View Pending Icon. This will ensure that the serial numbers in the Inventory Range Area and the Pending Receipts area match. Then you can click the Save icon.

iii. The third way to use the screen is to click the View Pending Icon. Then open the *Pending Receipts* child section and selecting the items to receive in the *Select* field.

iv. The fourth way to use this screen is to perform a Receive/Reject All. To perform this function first open the *Pending Receipts* child section, verify that all serial numbers listed have arrived at the issue point. Then click the Receive/Reject All icon.

c. Remember the above steps are the same for either Receiving or Rejecting material.

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 of the *Pending Receipts* child section.
6. Click the Save icon.
7. You can print a record of the received materials by clicking the Print icon.

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)

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,* 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 to 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,* 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 to 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,* 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,* 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.

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 can not 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 issue and track the issue of a range of serial numbered inventory items to employees. The items have to be all the same MSDS. 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)

Issuing a Range of Inventory Items with a Scale

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.
6. If required, enter the *Building* 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.
10. Click the *Get Details* button. Once the range of serial numbers appears in the *Issue Details* child section, then press the **Print** button 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.
11. If required, enter the *Process Code* for how the material will be used.
12. If required, enter the *Emission Point* for where the material will be used.
13. After all the items have been entered into the record, click the Save icon.

Turn In Screen Overview

The *Material Functions/Transactions/Turn In* screen provides the capability to track the return of items previously issued to employees. This screen is also 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.

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:
  - 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.)
  - If there is only one entry, the issue point will automatically populate in the appropriate field. (The LOV will be suppressed.)
  - 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.

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.

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.

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 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.

<u>Additional Information</u>

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.*

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 either 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.

Equipment Turn In Screen Overview

The *Material Functions/Transactions/Equipment Turn In* screen is used to issue equipment, record the turn in of equipment, and review the items certain employees currently have issued.

Turning In Equipment

1. Open the *Material Functions/Transactions/Equipment Turn In* screen.
2. Query for record of the employee to which the issue was made.
3. Click the Edit icon beside the record of the employee to whom the equipment was issued.
4. In the *Equipment Information* child section, click on the row of the equipment being turned in.
5. Click the Edit icon.
6. Click in the *Equip Turn In Dt* field for the record of the item the person is turning in.
7. Click the Save icon.
8. The *Equipment Information* child section will reopen, allowing you to repeat steps 4 through 7 until all equipment turn ins for the employee are complete.

Reviewing What Equipment an Employee Currently Has Issued to Them

1. Open the *Material Functions/Transactions/Equipment Turn In* screen.
2. Query for record of the employee to which the issue was made.
3. Click the Edit icon beside the record of the employee to whom the respirator was issued.
4. In the *Equipment Information* child section you will find a listing of the items currently issued to the employee.

Issuing a New Equipment Item to an Employee

1. Open the *Material Functions/Transactions/Equipment Turn In* screen.
2. Query for record of the employee to which the issue was made.
3. Click the Edit icon beside the record of the employee to whom the respirator was issued.
4. Open the *Equipment Information* child section.
5. Click the New icon to insert a new record.
6. The *Equipment Issue – Add* screen opens,
7. Fill in the *Equip QTY* field.
8. Fill in the *Description* field.
9. Ensure that the dates are correct in the *Equip Iss Dt* and the *Equip Due Dt* fields.
10. 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.

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.

Respirator Issue Screen Overview

The *Material Functions/Transactions/Respirator Issue* screen provides a means whereby the fit, the manufacturer, a brief description of equipment, the issue, and turn in of equipment is tracked for each employee having a valid requirement.

It is not possible to issue a mask to an individual until that person has had one or more masks fit.

Entering Mask Fit Information

1. Open the *Material Functions/Transactions/Respirator Issue* screen.
2. Query for record of the employee to which mask/fit information is being entered.
3. Click the Edit icon beside the record of the employee for whom you want to enter Mask Fit data.
4. In the *Respirator Issue Date* child section, click the New icon.
5. Enter the date that the fit test was accomplished in the *Fit Date* field
6. Enter the date that the fit test expires in the *Exp Date* field.
7. Click the Save icon.
8. To enter the mask information proceed as follows:
    a. Click the Fit Date field to highlight the line.
    b. Click the View Details icon.
    c. The *Respirator Issue Date* screen will open.
    d. In the *Respirator Mask Information* child section,
    e. Click the New icon.
    f. Enter the following fields in the child section:
        i. Issue Ind
        ii. Mask QTY
        iii. Mask Mfg
        iv. Mask Type
        v. Mask Comments

g. Click the Save icon.

9. To enter the filter cartridge information proceed as follows:
    a. Click in the row of the mask information you just entered.
    b. Click the View Details icon.
    c. The *Respirator Issue Mask Information* screen will open.
    d. In the *Respirator Cartridge Information* child screen,
    e. Click the New icon.
    f. Input the information for the *Cart Qty* field.
    g. Input the information for the type cartridge in the *Mask Cartridge* field.
    h. Click the Save icon.

Modifying Mask/Cartridge Information

Follow the steps for the specific changes you want to make.

Changing the Fit Date or the Fit Expiration Date:

1. Open the *Material Functions/Transactions/Respirator Issue* screen.
2. Query for record of the employee to which mask/fit information is being modified.
3. Click on the Edit icon beside the record of the employee whose mask/fit information is being changed.
4. In the *Respirator Issue Date* child section modify the dates you want to change.
5. Click the Save icon.

Changing Mask Data:

1. Open the *Material Functions/Transactions/Respirator Issue* screen.
2. Query for record of the employee for which mask/fit information is being modified.
3. Click on the Edit icon beside the record of the employee whose mask/fit information is being changed.
4. In the *Respirator Issue Date* child section click in the row of the mask for which you want to modify data.
5. Click the View Details icon. After you do, the *Respirator Issue Date* screen will open.
6. In the *Respirator Mask Information* child section make changes to the record as necessary.
7. Click the Save icon.

Changing Cartridge Information:

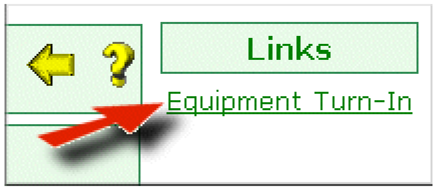
1. Open the *Material Functions/Transactions/Respirator Issue* screen.
2. Query for record of the employee for which mask/fit information is being modified.
3. Click on the Edit icon beside the record of the employee whose cartridge information is being changed.
4. In the *Respirator Issue Date* child section click in the row of the mask for which you want to modify data.
5. Click the View Details icon. After you do, the *Respirator Issue Date* section will open.
6. In the *Respirator Mask Information* child section Click in the row of the record for which you want to change the cartridge data.
7. Click the View Details icon. After you do, the *Respirator Issue Mask Information* section will open.
8. In the *Respirator Cartridge Information* screen click in the row of the cartridge information you want to change. Make changes to the record as necessary
9. Click the Save icon.

Issuing a Respirator

1. Open the *Material Functions/Transactions/Respirator Issue* screen.
2. Query for record of the employee to whom the issue is being made.
3. Click the Edit icon beside the record of the employee you want to issue the respirator to. After you do the *Respirator Issue* section will open.
4. In the *Respirator Issue Date* child screen, click on the record of the respirator you want to issue.
5. Click on the View Details icon.
6. Select the *Issue Ind* field beside the record of the respirator you are issuing.
7. Click the Save icon.

Reviewing What Equipment an Employee Currently Has Issued to Them

1. Open the *Material Functions/Transactions/Respirator Issue* screen.
2. Query for record of the employee to which the issue was made.
3. Click the Edit icon beside the record of the employee to whom the respirator was issued.
4. In the *Respirator Issue* screen, click the *Equipment Turn In* link.



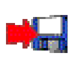
5. After you do, the *Equipment Issue* child screen will open.
6. In the *Equipment Information* child screen lists the items currently issued to the employee.

Turning in a Respirator

Step Description

You can follow these steps, or you can use the *Material Functions/Transactions/Equipment Turn In* screen.

1. Open the *Material Functions/Transactions/Respirator Issue* screen.
2. Query for record of the employee to which the issue was made.
3. Click the  Edit icon beside the record of the employee to whom the respirator was issued.
4. Click the Equipment Turn In Link.

5. After you do, the *Equipment Turn In* child screen will open.
6. In the *Equipment Information* child screen, click on the row of the respirator being turned in.
7. Click the  Edit icon.
8. Click in the *Equip Turn In Dt* field. Enter the appropriate date.
9. Click the  Save icon.
10. The *Equipment Information* child screen will reopen, allowing you to repeat steps 6 through 9 until all respirator turn ins for the employee are complete.

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.

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.

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 can not 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

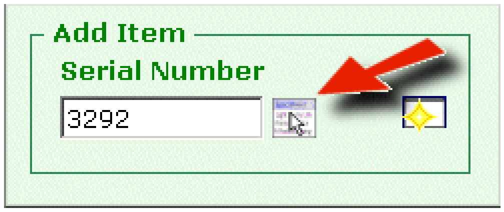
The *Material Functions/Tools/Kit Build/Break* screen is used to put inventory items together into kits based on a kit definition (Kit ID), replace a part of a kit with a replacement inventory item, or completely disassemble a kit back to singular inventory items. Kits are groups of items to be issued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

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 in 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.

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 definition of the actual shelf-bin locations takes place in the *Shelf/Bins for Issue Point* child screen of the *Administration/Material/Issue Points* screen.

Assigning Items to a Shelf-Bin

1. Open the *Material Functions/Tools/Shelf-Bin* screen.
2. Query for the issue point in which the shelf-bin is located.
3. Click on the Edit icon beside the record for the shelf where the material will be located.
4. Open the *Shelf-Bin Details* child section.
5. Click the New icon.
6. With the cursor in the *Serial Number* field of the new record you are entering, scan, enter with the keyboard, or select the serial number of the item you are assigning to the shelf-bin.

   Note: If you are entering a kit, you only need to enter one item from the kit, the others will automatically be assigned to the same shelf-bin.

7. Enter any remaining items to assign to the shelf-bin:
   a. If you are scanning the inventory scan the remaining items that are being assigned to the shelf/bin.

b. If you are entering the items manually, click the New icon after entering each serial number.

8. When all the items are assigned to the shelf-bin, click the Save icon.
9. If you want to assign items to another shelf-bin, repeat steps 1-8 for each shelf-bin you want to assign items for.

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.

Clearing a Shelf-Bin of All Inventory

After performing these steps, the items that are assigned to the shelf-bin will not be assigned to a specific location in the issue point.

1. Open the *Material Functions/Tools/Shelf-Bin* screen.
2. Query for the issue point in which the shelf-bin you want to clear is located.

3. Click on the Edit icon beside the record for the shelf where the material will be located.
4. Click the Clear Shelf icon.

Clearing a Shelf-Bin of Some Inventory

After performing these steps, the items that are assigned to the shelf/bin will not be assigned to a specific location in the issue point.

1. Open the *Material Functions/Tools/Shelf-Bin* screen.
2. Query for the issue point in which the shelf-bin you want to clear is located.
3. Click on the Edit icon beside the record for the shelf where the material will be located.
4. Click the *Show Shelf Bin Details* Icon.
5. Open the *Shelf-Bin Details* child section.
6. Click on the row of the item you want to remove from the shelf-bin.
7. Click the Delete icon.
8. Click the Yes button on the confirmation message.
9. Repeat steps 6 through 8 for the items you want to remove from the shelf-bin.
10. Click the Save icon.

Moving All Inventory from One Shelf-Bin to Another

After performing these steps, all the items that are assigned to one Shelf-Bin will be assigned to a different shelf-bin in the issue point.

1. Open the *Material Functions/Tools/Shelf-Bin* screen.
2. Query for the issue point in which the shelf-bins are located.
3. Click on the Edit icon beside the record for the shelf where the material is currently located.
4. Click the Transfer All icon.
5. In the *Entry Form* screen, select the *New Shelf-Bin Code field.*
6. Click the OK button.

Moving Some Items from a Shelf-Bin to Another

1. Open the *Material Functions/Tools/Shelf-Bin* screen.
2. Query for the issue point in which the shelf-bins are located.
3. Click on the Edit icon beside the record for the shelf where the material is currently located.
4. Click the *Show Shelf Bin Details* Icon.
5. Open the *Shelf-Bin Details* child section.
6. Click the Delete icon beside the record of each item you want to move to the other shelf-bin.
7. Click the Yes button on the confirmation message.

   Note: If you are moving a majority of the items on the shelf, you might find it faster to move all the items to the new shelf-bin then follow these instructions to move the remainder to the old shelf-bin.

8. Open the *Material Functions/Tools/Shelf-Bin* screen.
9. Query for the issue point in which the destination shelf/bin is located.
10. Click on the Edit icon beside the record for the destination shelf-bin.
11. Open the *Shelf-Bin Details* child section.
12. Click the New icon
13. With the cursor in the *Serial Number* field of the new record you are entering, scan, enter with the keyboard, or select the serial number of the item you are assigning to the shelf-bin.

    Note: If you are entering a kit, you only need to enter one item from the kit, the others will automatically be assigned to the same shelf-bin.

14. If you are scanning the inventory, scan the remaining items that are being assigned to the shelf-bin.
15. If you are entering the items manually, click the New icon after entering each serial number.
16. When all the items are assigned to the shelf-bin, click the Save icon.

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.

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 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.

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.

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.

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.

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 *External Transaction History* child section to see the details about the serial number prior to the arrival at your site.
   - 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.

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 *External Transaction History* child section to see the details about the serial number prior to the arrival at your site.
- 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 Screen Overview

The *Material Functions/Queries/Display Requests* 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.

Reviewing a Request

1. Open the *Material Functions/Queries/Display Requests* screen.
2. Query for the request you want to review.
3. 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 *Authorization Request* link to the right of the table to open the authorization request screen, if applicable.

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.

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 or authorized to use certain materials.

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: The inventory sharing partnership and external site must make inventory available to you.

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.

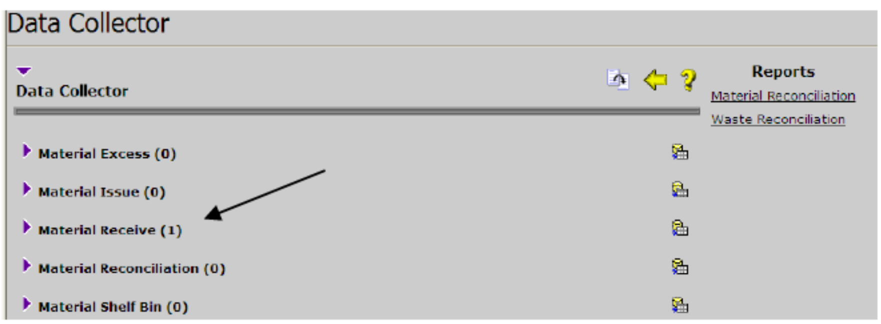
5. Select the search criteria from the drop down list (default is Issue Point).
6. Select the condition operator from the drop down list (default is =).
7. Type in your search criteria.
8. If necessary click the *And/Or* button to add more search criteria.
9. Click the *Search* button to execute the search.
10. Your search results are returned in the *Query External Inventory* area.

Using the Data Collector Screen

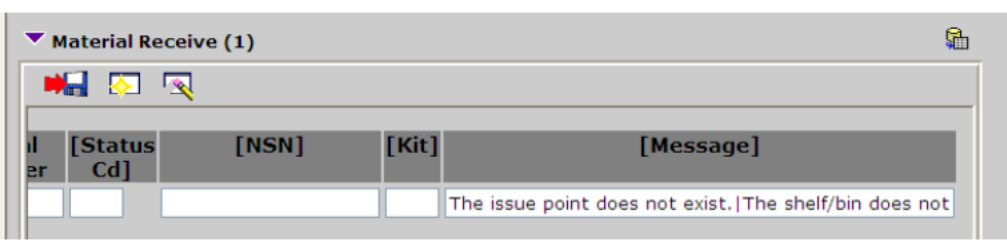
The *Other Functions/Hand-held Devices/Data Collector* screen is used to collect any scanned transactions that contained errors. All transactions that are completed on a Hand-held device are validated with HMMS. If there are any problems or errors detected the transaction will be placed in this screen under the appropriate child record.

Reviewing and Correcting transactions

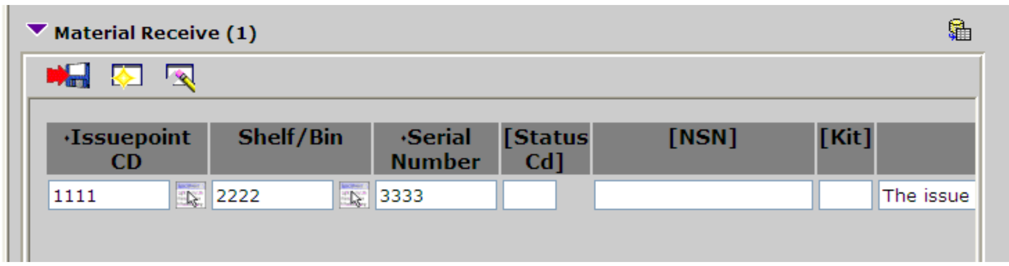
1. Open the *Other Functions/Hand-held Devices/Data Collector* screen.
2. Open the appropriate child record that contains the error.



3. Review the error message.



4. If required, corrections can be made in the child record. In the example above the error message states that the Issue Point or Shelf/Bin does not exist.
5. To correct the data click in the field and insert the correct data.



6. When all the errors are corrected, click the save icon

Generate Labels Screen Overview

The *Other Functions/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 *Other Functions/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 *Other Functions/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 - INVENTORY

1-1 Create New Inventory

1. Go to **Material Functions/Transactions/New Inventory**.
2. Select an 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 **manufacturer**, 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 exer 2-2
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 / TURNIN

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.