

ENVIRONMENTAL MANAGEMENT SYSTEMS (EMS)

WASTE MANAGEMENT MODULE

REFERENCE GUIDE



www.chemicalsafety.com

Table of Contents

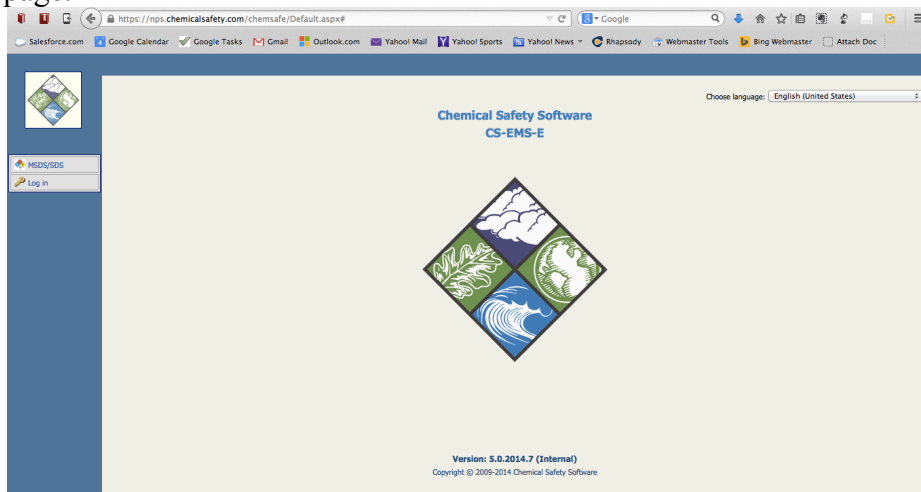
Section One: Accessing the EMS System	4
Logging on to the Web App:	4
Section Two: EMS' Menu and Navigation System	5
Choosing a QuickStart Screen:	5
Easy Navigation with QuickStart:	6
The Main Menu	8
The Search Screen - Finding Records Quickly	8
The Search Results - Working with a Set of Records	9
Section Three: EMS' Data Structure	13
Facility, Building & Location Hierarchy	13
Other Related Database Tables	14
Section Four: Working with Records	16
Viewing a Record	16
Editing a Record	16
Context-sensitive Help	18
Deleting a Record	19
Cloning a Record	20
Adding a New Record	20
Navigational Buttons and Menus	22
Section Five: The Waste QuickStart Screen	24
Chemists/ Waste Handlers	24
Waste Inventory Tracking	25
Manifesting / Disposal	25
Facility Waste Operations	26
Report Center	26
Section Six: Working with Records in the Waste System	28
How to Add a Waste Profile Record	28
How to Add a Waste Item	32
Transferring Waste Items	33
Waste Drums vs. Waste Items	33

Lab Pack Items.....	34
How to Add a Waste Drum Record.....	34
How to Add a Drum Item or Lab Pack Item to a Drum Record.....	35
How to Add a Waste Manifest.....	36
Section Seven: EMS Ad Hoc (Management) Reports	38
How to View and Print Ad hoc Reports	38
Filtering Reports by Category	39
Editing an Ad hoc Report - Summary	40
Editing an Ad hoc Report - Details	41
How to Clone an Ad hoc Report.....	42
How to Create a New Ad hoc Report.....	43
Section Eight: EMS User Accounts and User Preferences.....	45
Creating a User Account.....	45
Setting Access Rights using Groups.....	45
Setting User Preferences.....	45
Search Preferences.....	46
Configuring the Favorite Reports List.....	47
Section Nine: Where to Get Additional Help.....	48

Section One: Accessing the EMS System

Logging on to the Web App:

1. Open a web browser and enter the URL for your site. You will see the following home page:



If your site is not available you may want to use the Chemical Safety training site:

<https://emsdemo.chemicalsafety.com/chemsafe/client/jintest>

2. Click the **Log In** button on the left side of the screen. On the login screen, enter your user ID and password and then click on the **Log in** button:

A screenshot of the login form. The form has a blue header with the text "Log in". Below the header, it says "Please enter your User ID and Password and click Log in." There are two input fields: "User ID:" and "Password:". Below the "Password:" field, there is a checkbox labeled "Remember me next time." and a "Log in" button.

If you need to create a user account, see the section on *Creating a User Account*.

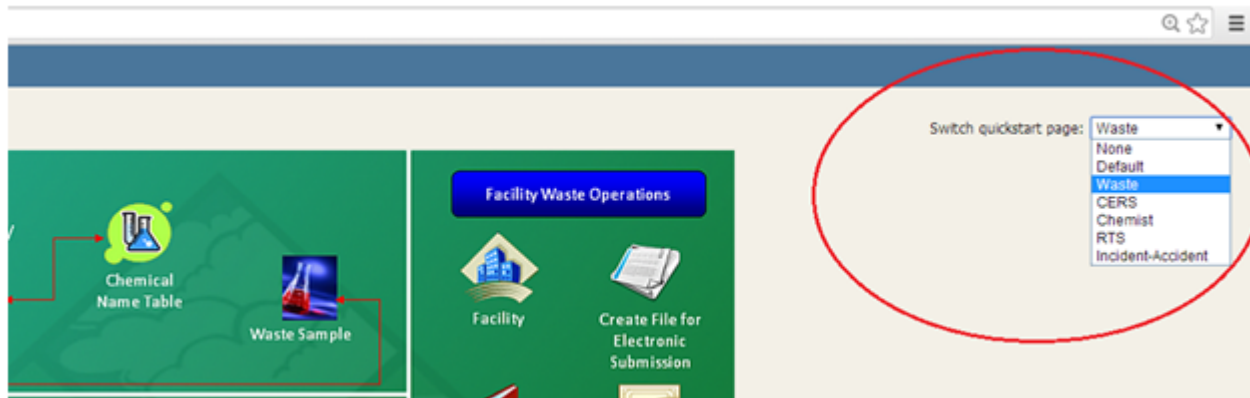
Section Two: EMS' Menu and Navigation System

Choosing a QuickStart Screen:

EMS provides two ways to navigate through the system: the **Main Menu** on the left side of the screen and a **QuickStart Menu** in the center of the screen.

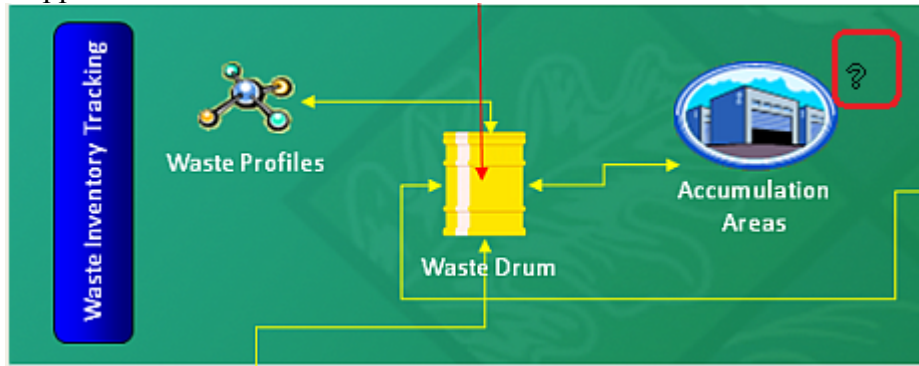


EMS offers a choice of QuickStart screens in order to help with particular work flows. Each user account can be configured to display a specific QuickStart screen or none at all if that is preferred. If a QuickStart screen does not appear or if you would like to switch to a different one, go to the “Switch Quick Start” dropdown menu at the top right of your screen.

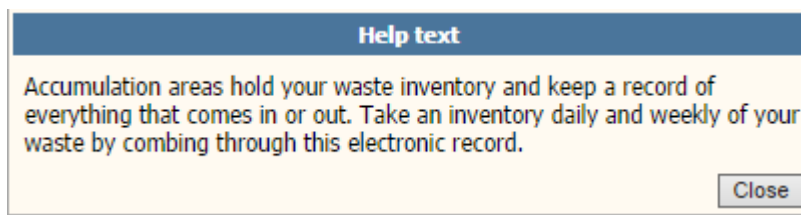


Easy Navigation with QuickStart:

In every EMS QuickStart screen you can place the mouse over any of the icons and a question mark will appear as shown:

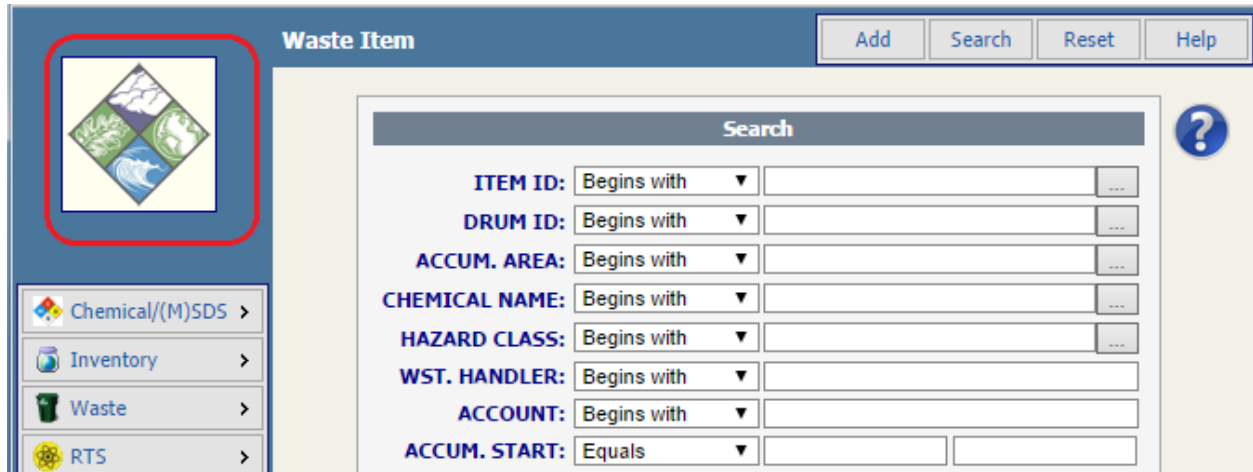


Click on the question mark to learn more about that icon.



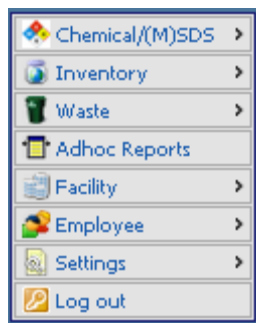
Click on any icon to go to a specific module in the system. You can get there also by navigating through the main menus at the left of the screen, but going through QuickStart is easier. If you click on an icon and nothing happens, it means that your user account does not have permission to access that function.

Once you have landed in a specific module, you can return to the QuickStart screen by clicking the icon in the upper left as shown:



The Main Menu

The EMS Main Menu is always available on the left to access EMS' various modules, forms and functions. The menu items that appear are the ones that you are licensed for.



Chemical/MSDS: Manage (M)SDS information, view hazard and chemical reference information for the MSDS.

Inventory: Manage material inventory information.

Waste: Manage on and off site waste disposal.

Ad hoc Reports: Create, run, view and print user defined reports.

Facility: Manage facility, building and location information.

Employee: Manage human resources info including employee training and incidents/accidents.

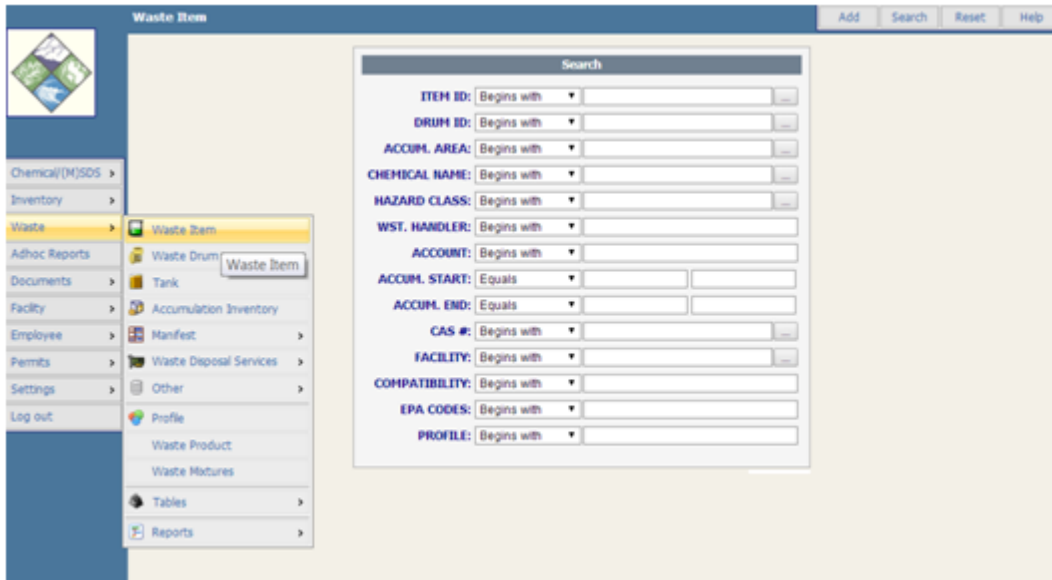
Settings: Configure user settings.


Log Out: End your session and log out of the EMS Web Interface.

The Search Screen - Finding Records Quickly

The first time you click on any of the QuickStart screen items, you will be taken to the EMS module that was specified and a search screen will appear. You can also get here when you select a module from the Main Menu on the left side of the screen. There can be hundreds or even thousands of records in the database, and this screen allows you to quickly filter the results.

[The screen shot shows an example from the Waste Item module; however, the user interface is the same throughout all of the EMS modules.]



- You can perform a search by typing search criteria into one or more of the search fields. For example, “Chemical Names Begins with Acetone”.
- You can also select a value from the popup buttons that appear on the right of the search field .
- You can also change the search operators from “Begins with” to “Contains” to “Is blank” as needed.
- You can clear all of the search fields by clicking the Reset button in the upper right.
- Help is available by clicking the button on the upper right menu

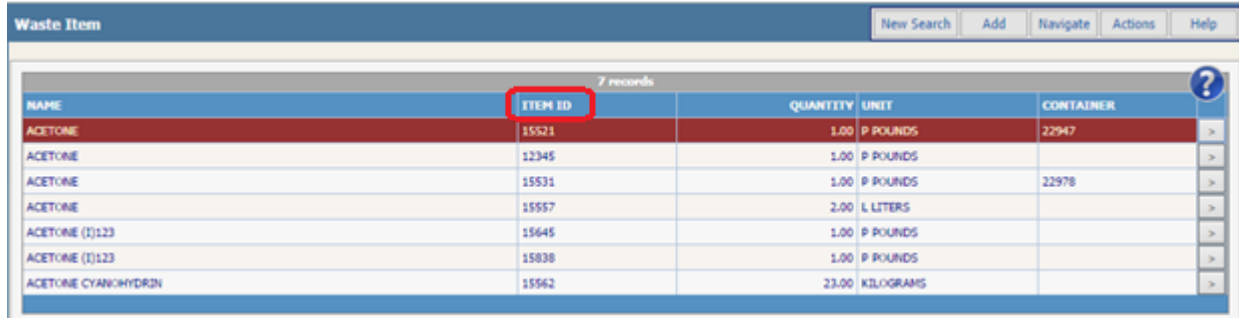
Specify as many search criteria as you like (or none) and then click on the search button in the upper right portion of the screen. The system will return the filtered results:

Waste Item					New Search	Add	Navigate	Actions	Help
7 records									
NAME	ITEM ID	QUANTITY	UNIT	CONTAINER					
ACETONE	15521	1.00	P POUNDS	22947					
ACETONE	12345	1.00	P POUNDS						
ACETONE	15531	1.00	P POUNDS	22978					
ACETONE	15557	2.00	L LITERS						
ACETONE (I)123	15645	1.00	P POUNDS						
ACETONE (I)123	15838	1.00	P POUNDS						
ACETONE CYANOHYDRIN	15562	23.00	KILOGRAMS						

The Search Results - Working with a Set of Records

The resulting set of records that match the search criteria is called the *boundary*. Later, when you print a report, the system will ask you if you want the report data to include the entire boundary or just the one record that you have open.

You can reorder the list of records by clicking on the column header. Click again to reverse the order.



Waste Item New Search Add Navigate Actions Help

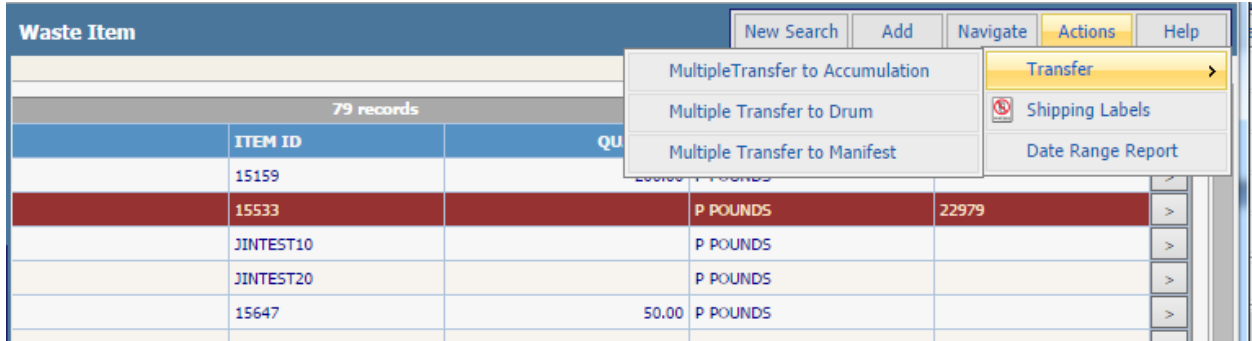
7 records ?

NAME	ITEM ID	QUANTITY	UNIT	CONTAINER	
ACETONE	15521	1.00	P POUNDS	22947	>
ACETONE	12345	1.00	P POUNDS		>
ACETONE	15531	1.00	P POUNDS	22978	>
ACETONE	15557	2.00	L LITERS		>
ACETONE (I)123	15645	1.00	P POUNDS		>
ACETONE (I)123	15838	1.00	P POUNDS		>
ACETONE CYANOHYDRIN	15562	23.00	KILOGRAMS		>

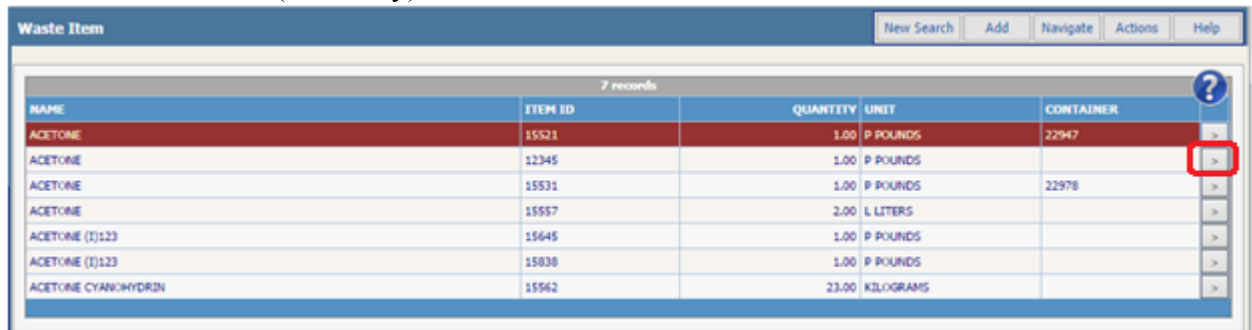
There are other functions that operate on the boundary, including the following:

- Delete all in boundary
- Export to Excel
- Transfer of containers
- Printing Reports and Labels

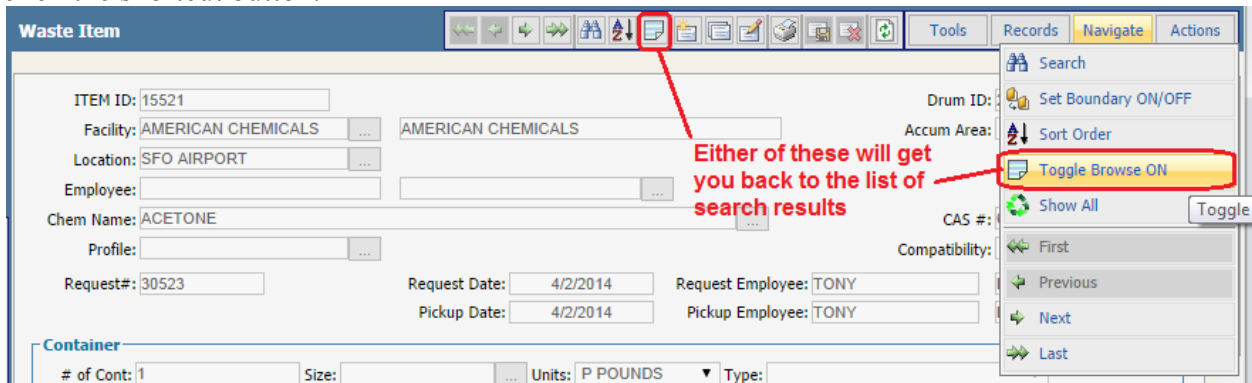
You can use the menus in the upper right to explore these functions. In particular, the options under the Action menu change depending on which module you are in.



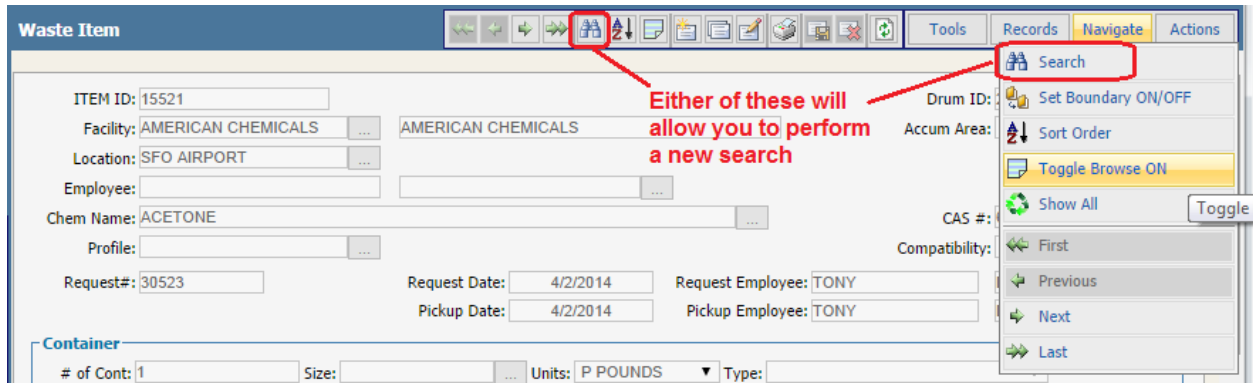
To open a record, double click on the line or click the button on the right. This will open the record in view mode (read-only).



To get back to the list of search results select the menu item **Navigate\Toggle Browse On** or click the shortcut button.

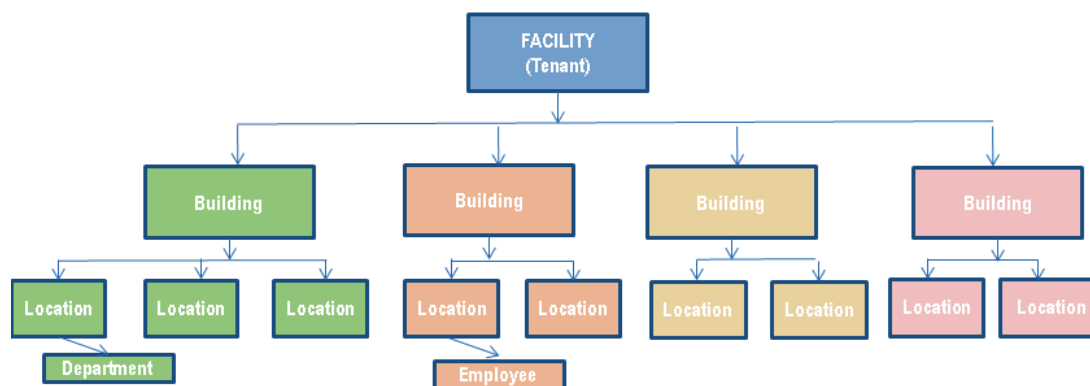


To perform a new search select the menu item **Navigate\Search** or click the shortcut button.



Section Three: EMS' Data Structure

DATA STRUCTURE AND HIERARCHY



Facility, Building & Location Hierarchy

The location hierarchy is the root of all EMS data. Since it involves mainly stable information (addresses, building numbers, etc.), it rarely needs to be updated. The location hierarchy consists of the following databases:

- **Facility:** usually refers to the broadest description of the site of an organization, such as the name of the organization or one of its headquarters' locations. You can enter unlimited facilities, but at least one facility record must be created before you can enter any other location data. It's important to know that a federal EPA ID is associated with a facility for some regulatory reports.
- **Building:** refers to an actual physical building where materials are utilized and stored. A facility record must exist in order to create building record. It may be that at your facility all buildings have been listed by number for consistency and accuracy, but there is an additional field in the building record called synonym that can be used to search for building information by name. For example, Building 232 has a synonym of Spanagel Hall.
- **Location (or Accumulation Area):** allows you to enter in great detail where a material can be stored and found, including the floor, room number, and location description (such as a particular shelf, drawer or cabinet). Locations illustrate how the facility and building information are linked directly to each other, as it requires that there be at least one record for each database above it in the hierarchy. You cannot create a location record without first linking a facility and building record to the location. You can create multiple storage locations within a single room. The field called Location/Desc is a required field in Location and the place where the specific location is identified in detail. An *Accumulation Area* is the equivalent of a location, except that it is used to store waste containers such as drums.

Other Related Database Tables

There are other database tables linked to the location hierarchy that you should be familiar with before moving on:

- **Employee:** contains information such as employee names, titles, locations, responsibilities, and phone numbers. ID numbers and photos, and medical and personal information can also be stored in this database. It is linked with the Accumulation Inventory database and facility hierarchy, which list the responsible persons for location and waste inventory data.
- **Container, Waste Item and Waste Drum:** itemizes what materials are stored in which locations by individual container.

The screenshot displays a web-based form for a 'Waste Drum'. At the top, there are fields for 'DRUM ID: 23075', 'Accum. Area', 'Tank', 'Manifest', 'Transferred to Drum', and 'Other ID'. Below this is a tabbed interface with 'Drum', 'Drum Items/Lab Packs', and 'Drum Details' tabs. The 'Drum' tab is active, showing fields for 'Facility' (set to 'DEFAULT FACILITY') and 'Location'. The 'Container' section includes 'Size', 'Type' (set to 'DM Drum Metal'), 'Condition', 'Empty ID', 'DOT Spec', 'Units' (set to 'P POUNDS'), and 'Weight (lbs)'. The 'Contents' section has 'Quantity', 'Units' (set to 'P POUNDS'), 'Lbs/Gal' (set to '8.34'), 'Lbs' (set to '0'), and an 'Estimated?' checkbox. Below these are fields for 'Internal Profile', 'External Profile', 'Status', 'Account', 'Cost', 'Create Date', 'Handling Codes', 'Disposal Method', 'LAB #', 'Process Generating WST', 'Drum Reuse', and 'Shipped'. The 'Shipping Name' section contains 'PSN', 'NOS', 'Labels', 'DOT Haz Class', 'UN #', 'EPA Codes', 'State Codes', 'Packing Grp', 'ERG', and 'UHC'. At the bottom, there are sections for 'PSN Notes', 'EPA Sub', and a 'NOTES' section.

- **Materials Inventory and Waste Accumulation Inventory:** summarizes the materials that are stored in a particular holding location.
- **Incident:** catalogs the incidents and accidents that have occurred. Each is tied to a physical location.

Since there is a relational hierarchy, ***be very careful about deleting a facility***. When a facility is deleted, everything associated with it – buildings, locations, employees, containers – is deleted as well. Only administrators should be given delete permissions on facilities and buildings.

You can take advantage of the hierarchy when creating test data in the system. The idea is to create a fake facility/building/location and put your fake containers there. You can filter on the facility when searching for records and when printing reports. You can delete this fake facility to clean up all of the test data when you are done.

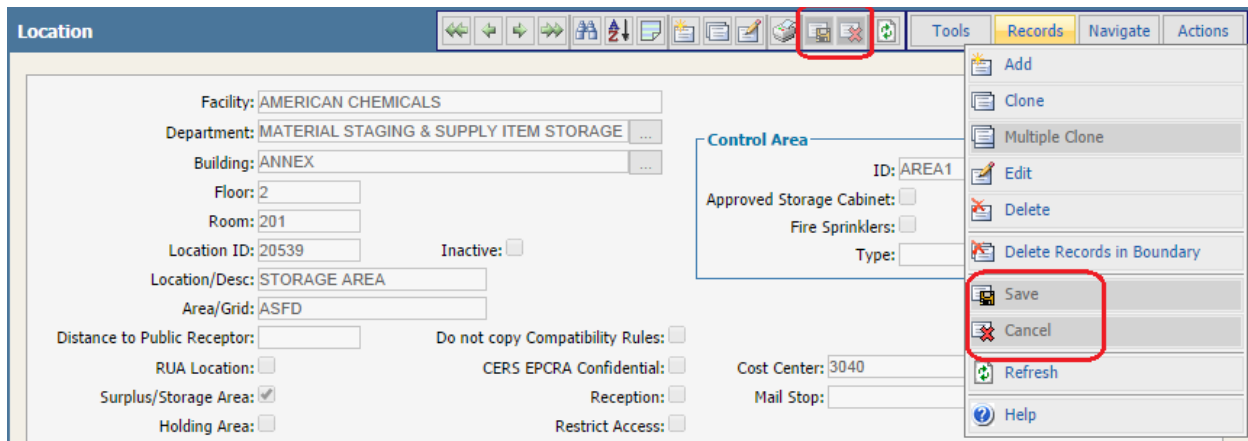
Also, note that a user logon can be configured to view only data associated with a particular facility. This can be useful as a security measure.

Section Four: Working with Records

In EMS there is a uniform user interface for all records, regardless of which module you are working in. In this section we will illustrate how to view/edit/delete/add/clone a record using the Location module. However keep in mind that records for all EMS modules work the same way.

Viewing a Record

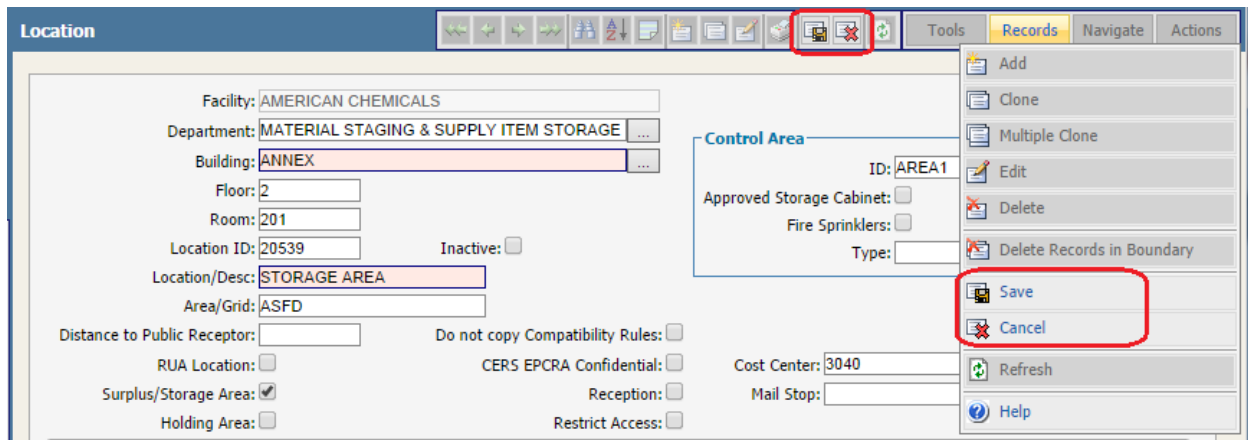
Start by selecting Facility\Location from the Main Menu. Click the Search button in the upper right. Then double click on any record in the search results to view the record.



Notice that the field data is displayed in a **gray** font and that you cannot edit the data. This is because all records are displayed by default in view mode. The Save and Cancel buttons and menu items are disabled as well.

Editing a Record

To edit the record, click the Edit button or select Records/Edit.



Notice that the editable field data is displayed in a **black** font and that you can change it. Now the Save and Cancel buttons are enabled so you can select whichever option you want.

Required fields have a pink background; the system won't let you save the record unless these fields are populated.

Notice the button with the "...". This is a *pop up* button. Popups allow you to select from a pre-populated pick list.

Facility: AMERICAN CHEMICALS
Department: MATERIAL STAGING & SUPPLY ITEM STORAGE ...
Building: ANNEX ...
Floor: 2
Room: 201
Location ID: 20539 Inactive:
Location/Desc: STORAGE AREA
Area/Grid: ASFD

In this example, you have already defined buildings. If you click on the popup, it lets you choose from the list. For some popups, it will let you create a new entry on the fly.

Name	Facility	Number
ANNEX	AMERICAN CHEMICALS	ANNEX
BUILDING TESTFACILITY	TESTFACILITY	
CHEMISTRY CENTER	AMERICAN CHEMICALS	232-B
ENERGY RESEARCH CENTER	AMERICAN CHEMICALS	5
ENGINEERING RESEARCH CENTER	AMERICAN CHEMICALS	4
GREEN CHEMISTRY CENTER	AMERICAN CHEMICALS	2
IT CENTER	AMERICAN CHEMICALS	3
OPERATIONS	AMERICAN CHEMICALS	
PUBLIC WORKS	AMERICAN CHEMICALS	
SFO AIRPORT	AMERICAN CHEMICALS	
THE ASHBURY BUILDING	AMERICAN CHEMICALS	

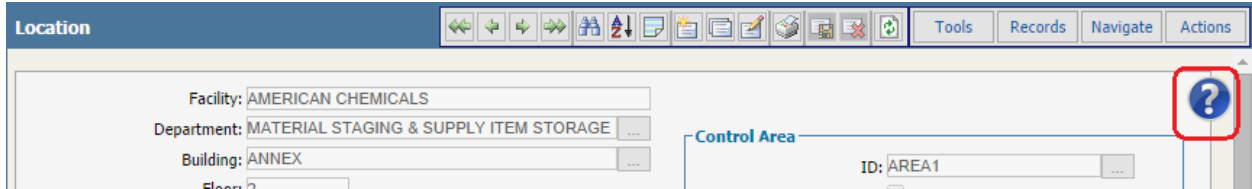
Also notice that EMS is smart enough to automatically populate the Facility field when you select a building.

The popup list is filtered by whatever text you have already entered in the field. So if you want to see a list of all the available choices, be sure to clear the field before clicking the pop up button.

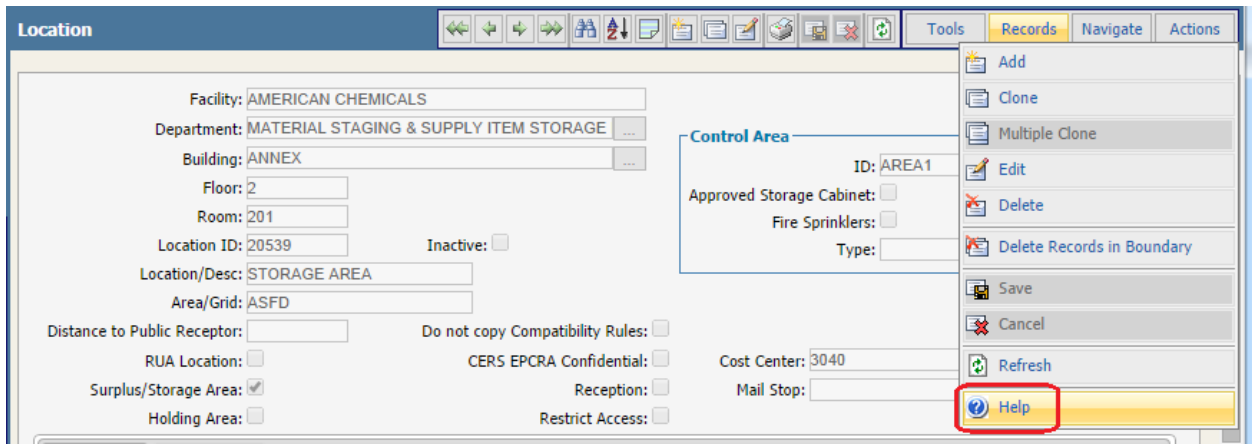
Go ahead and change any fields that you want. Then click the Save button.

Context-sensitive Help

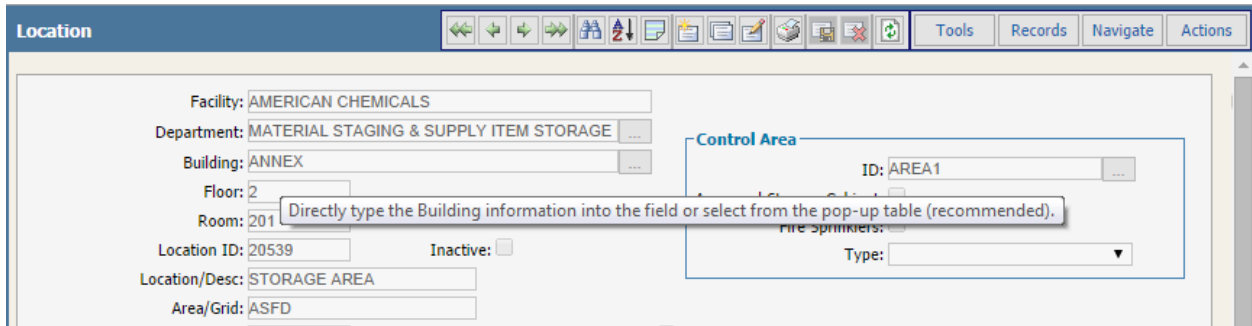
If you need help at any time, click on the question mark icon:



Or click on the Records/Help menu

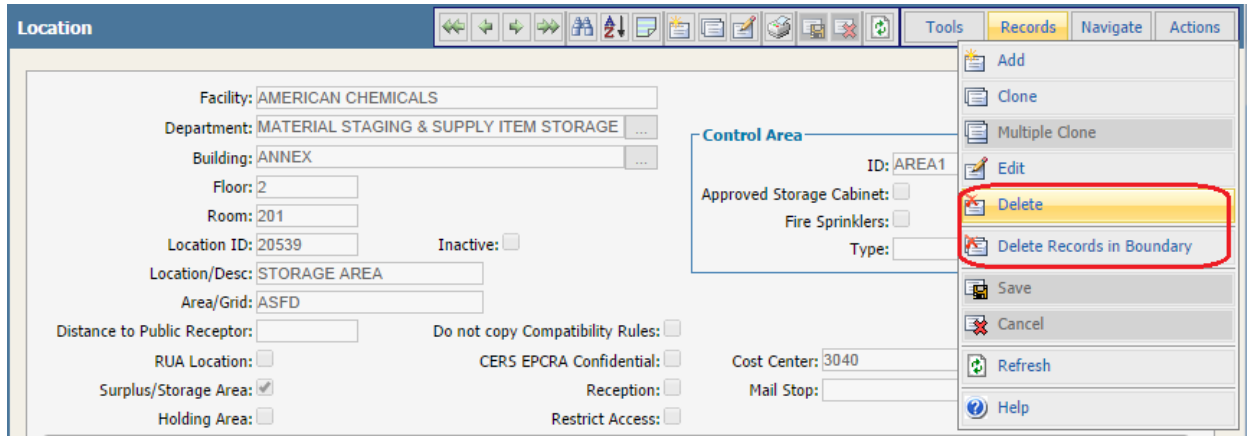


Tool tips are another good source of context-sensitive help when you are working with forms. They pop up when you hover the mouse over any field. In this example you can see the result when hovering over the Size field:

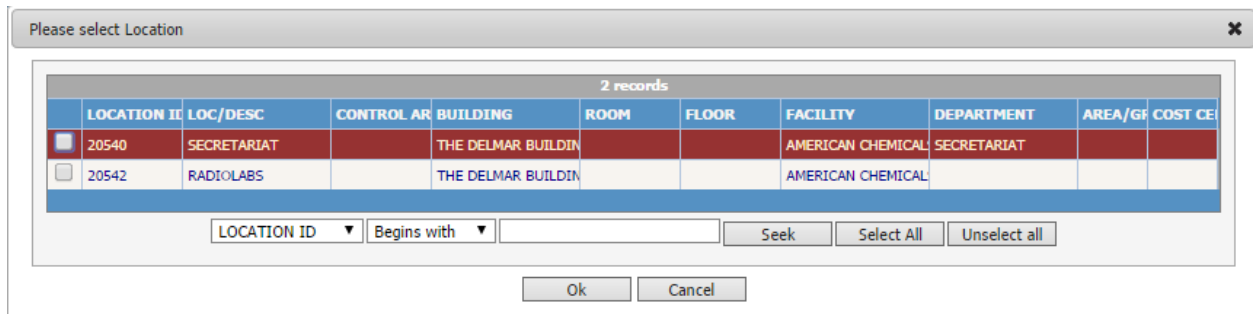


Deleting a Record

To delete a single record, open the record and select Records/Delete.

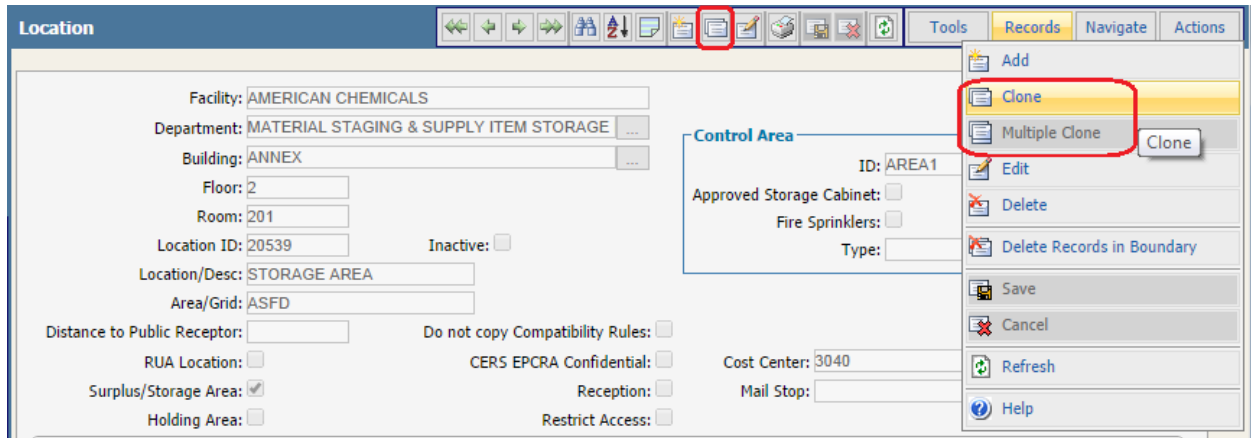


Be careful – if you select Records in Boundary, it will allow you delete all of the records returned by the search results. It will prompt you just in case:



Cloning a Record

It is often convenient to create a new record by cloning an existing one. To do this, open the source record and then click the clone button.

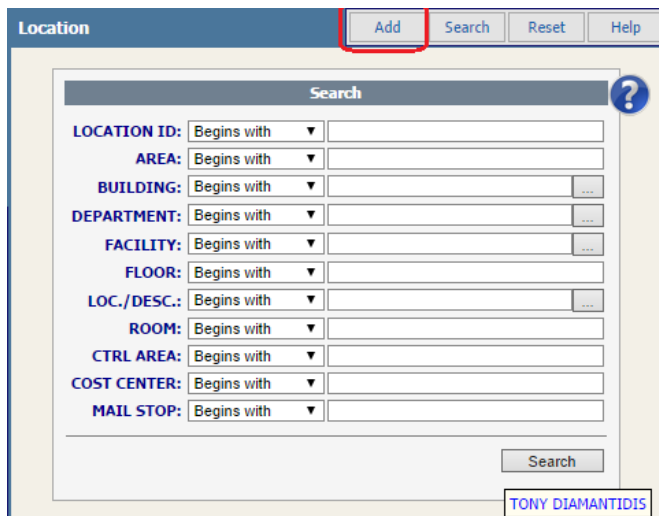


The system will automatically increment any ID numbers. In this case, the Location ID gets incremented. Required fields have a pink background. Go ahead and change any fields that you want. Then click the Save button.

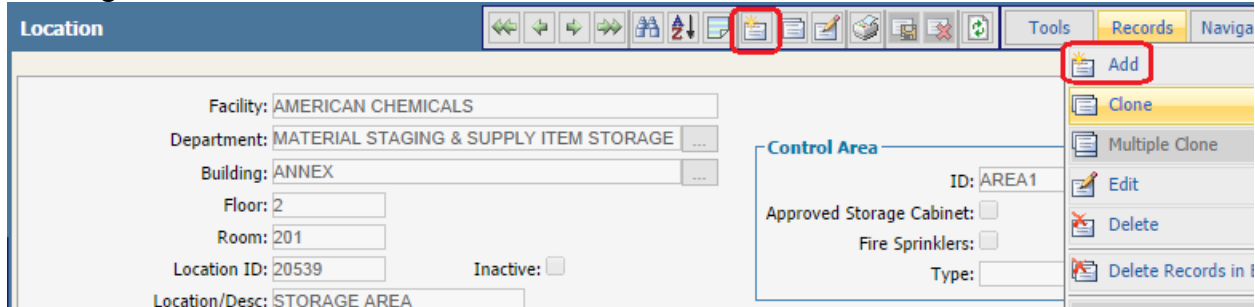
If you click Multiple Clone, you will have a chance to specify how many records you want created; the ID numbers will be incremented and the records will be saved.

Adding a New Record

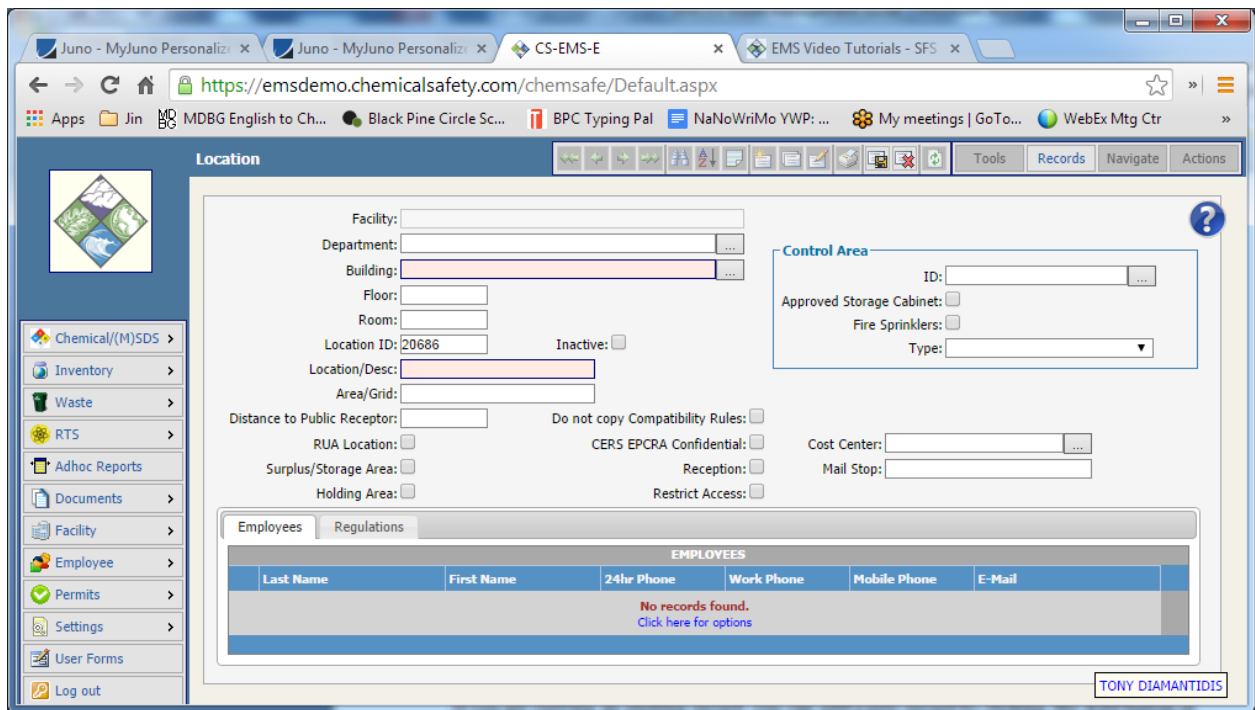
From the Search screen you can add a new record by clicking the Add button.



If you are viewing an existing record, you can add a new record by clicking the Add button or selecting Records/Add.



The system will automatically increment any ID numbers. In this case, the Location ID gets incremented. Required fields have a pink background.



Go ahead and change any fields that you want. Then click the Save button.

Navigational Buttons and Menu

Navigation Button Summary



Go to the first record in the group of records that resulted from a search

Go to previous records

Go to next record

Go to the last record in the group of records that resulted from a search

Perform a new search

Sort the records that resulted from a search

Toggle between a single record and the record list

Add a record

Clone (Duplicate) a record

Edit an existing record

Print a summary page of the record

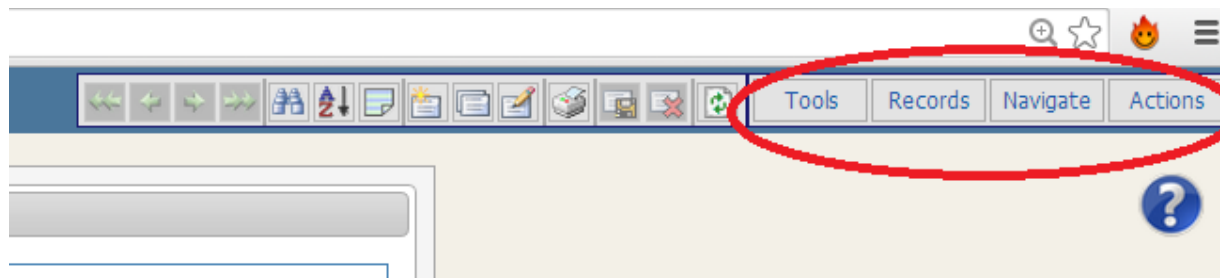
Save a record that is being added or edited

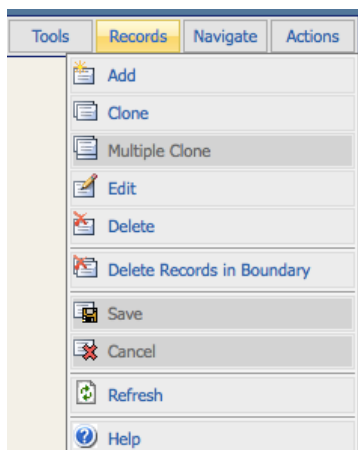
Cancel adding a record or changes made to an existing record

Refresh the record from the database

Navigation Menu

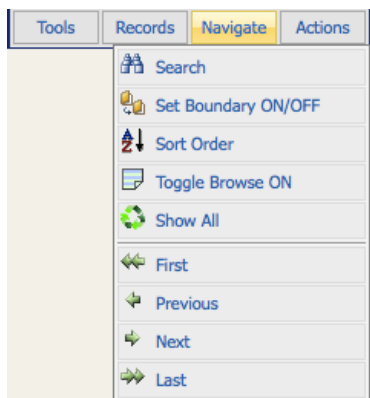
The navigational menus in the upper right duplicate the functionality of the navigation buttons. However, they also allow you to do many useful additional functions.





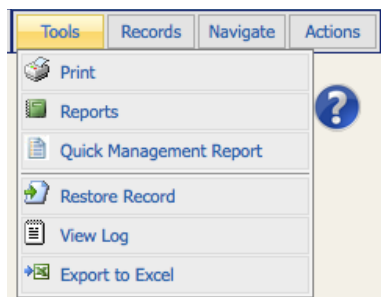
The **Records** menu in the upper right duplicates the functionality of the edit buttons.

It also allows you to delete records and get context-sensitive help.



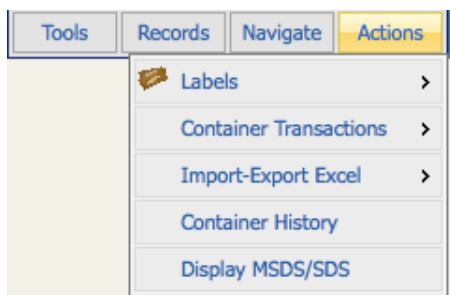
The Navigate menu duplicates some of the function of the navigation buttons.

It also lets you do some additional things.



The **Tools** menu lets you view and print multiple reports.

It also lets you export the data to an Excel spreadsheet.



The **Action** menu is perhaps the most interesting; its content changes depending on which module you are in.

Some functions are:

- Transfer containers to new locations
- View inventory on a map
- Discard chemical containers to transform them into waste containers

Section Five: The Waste QuickStart Screen

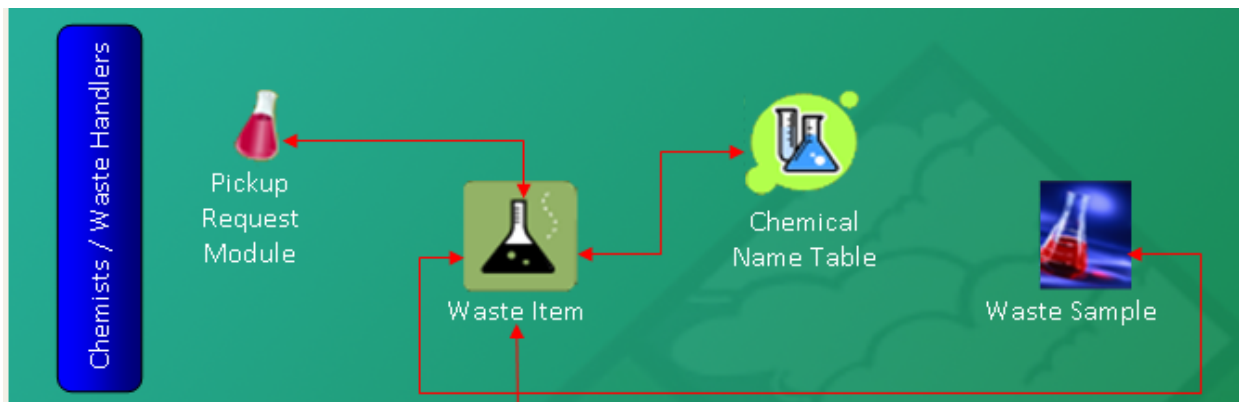
The Waste QuickStart screen displays shortcuts to many common tasks. The screen is divided into five functional categories for Generators, Handlers, and Managers:

- Chemists/ Waste Handlers
- Waste Inventory Tracking
- Manifesting/ Disposal
- Facility Waste Operations
- Report Center

Chemists/ Waste Handlers

This section allows you to create electronic records for each of your samples taken from drums and tanks and record analytical data and track sample material. Icons in this section of the screen allow you to:

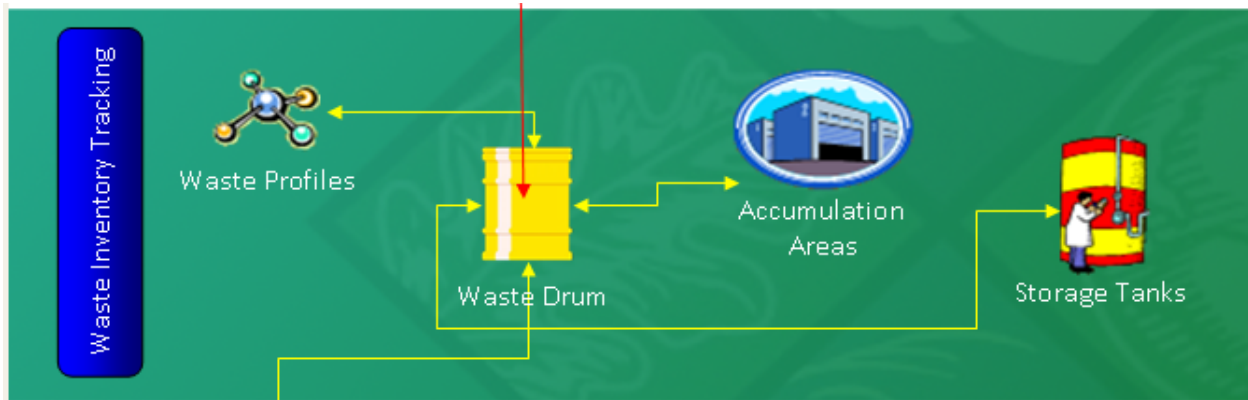
- Enter a waste pickup request
- Add/Edit/Transfer a Waste Item
- View the Chemical Name Table
- Add/Edit/Waste Sample data



Waste Inventory Tracking

This section allows you to keep a record of everything that comes into or out of waste accumulation areas. Icons in this section of the screen allow you to:

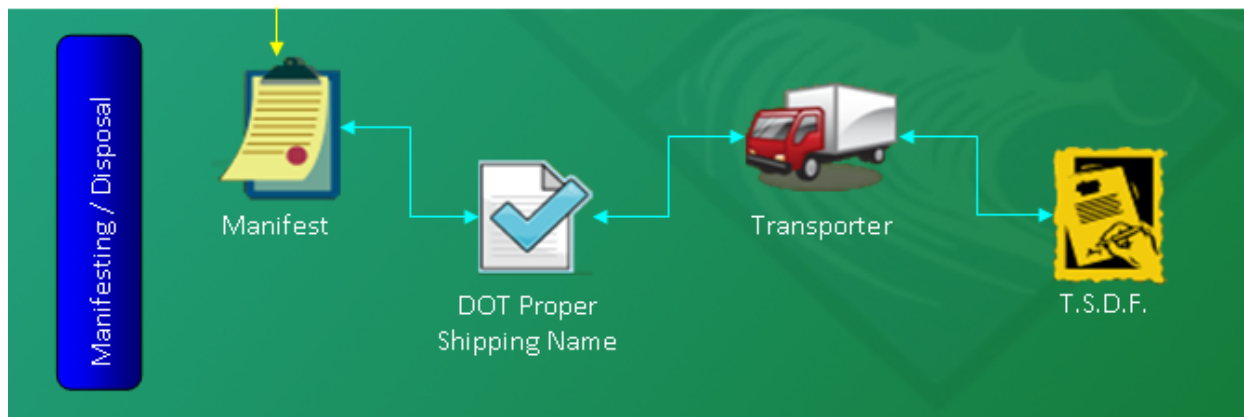
- View/Add/Edit Waste Profiles
- View/Add/Edit/Transfer Waste Drums
- View/Add/Edit Waste Accumulation Areas
- View/Add/Edit Waste Storage Tanks (for tracking bulk waste instead of by container)



Manifesting / Disposal

This section allows you to keep track of your waste haulers and related information, e.g., EPA ID #, Truck #, etc. Icons in this section of the screen allow you to:

- View/Add/Edit/Print Waste Manifests (and associated Manifest documents)
- View DOT Proper Shipping Name Information
- View/Add/Edit Waste Transporter Information
- View/Add/Edit Waste TSDF Information



Facility Waste Operations

Icons in **Facility Waste Operations** section of the screen allow you to:

- View/Add/Edit information specific to your Facility
- Generate/Edit/Print a Biennial Report
- Create an Electronic file for a Regulatory submission
- View/Add/Edit Certificates of Disposal for your waste.



Technical Support

The EMS 5.0—Support icon takes you to a section of the Chemical Safety website that offers useful advice on how to work with EMS, including FAQs and How-To videos.



Report Center

The Report Center at the bottom right of the screen displays a list of your 6 favorite reports; just click on any report name to view the report. Alternatively, to access all of your reports, click on the “Report Center” button.



For example, clicking the “ITEMS” link above might display a Waste Item report:

Waste Item Report

ITEMID	CHEM NAME	DRUM ID	FACILITY	CONTAINER SIZE	CONTAINER TYPE	UNITS	QUANTITY	EPA CODES
14902	SOLVENT WASTE		EPA-RTP MAIN CAMPUS	4	GB Glass Bottle	L LITERS	4.000	
14921	FLAMMABLE GAS		Default Facility	200	CY Cylinders	Y CUBIC YARDS	200.000	

Clicking on “Report Center” displays a list of all reports available to you:

Report list

#	Name	Type	Category	Date	User	
<input type="checkbox"/>	ACCUMULATION		WASTEQS	6/26/2012		menu
<input type="checkbox"/>	COSTPERPROFILE		WASTEQS	6/27/2013		menu
<input type="checkbox"/>	ITEM		WASTEQS	6/27/2013		menu
<input type="checkbox"/>	MANIFEST ACCOUNT TOTALS		WASTEQS	7/1/2013		menu
<input type="checkbox"/>	OPEN DRUMS		WASTEQS	6/27/2013		menu
<input type="checkbox"/>	OPEN MANIFESTS		WASTEQS	6/27/2013		menu



Click on any report name to see a preview of the report with data. You can also print a hard copy from the preview screen.

Section Six: Working with Records in the Waste System

The first step in setting up waste data involves adding a new waste profile record. Waste profiles can be attached to manifest and drum inventory records. You create them once, and after that you can use them again and again.

The waste profile table stores detailed information about different types of waste including:



- Chemical composition
- Waste stream
- Disposal method
- Waste disposal facility
- Tax category
- EPA Code(s)
- Land Ban information
- Proper Shipping name
- Disposal method
- Hazard class
- Physical characteristics (e.g., specific gravity or pH)

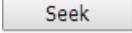
How to Add a Waste Profile Record

To set up a new waste profile record, start from the Waste Quick Start screen and click on the Waste Profile icon in the middle Waste Inventory Tracking section. Alternatively, the Waste Profile screen can be accessed via the main menu as well: (Waste -> Profile). Once you have navigated to the Waste Profile screen, click on the add button located in the upper right:

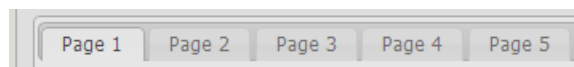
The screenshot shows the 'Waste Profile' application interface. In the top right corner, there are buttons for 'Add', 'Search', 'Reset', and 'Help'. The 'Add' button is circled in red. On the left sidebar, the 'Waste' menu is expanded, and the 'Profile' option is also circled in red. The main content area features a search form with the following fields:


- PROFILE #: Begins with [dropdown] [input] [clear]
- DESCRIPTION: Begins with [dropdown] [input] [clear]
- TSDF: Begins with [dropdown] [input] [clear]
- FACILITY: Begins with [dropdown] [input] [clear]
- PARENT: Begins with [dropdown] [input] [clear]
- INVOICE: Begins with [dropdown] [input] [clear]
- BIENNIAL: Equals [dropdown] [input] [input]
- ANNUAL: Equals [dropdown] [input] [input]
- LETTER SENT: Equals [dropdown] [input] [input]
- PHYSICAL STATE: Begins with [dropdown] [input] [clear]
- UPDATE: Equals [dropdown] [input] [input]
- STATE CODE: Begins with [dropdown] [input] [clear]
- EPA CODE: Begins with [dropdown] [input] [clear]
- WASTE TYPE: Begins with [dropdown] [input] [clear]
- LDR: Begins with [dropdown] [input] [clear]
- INTERNAL PROFILE: All [dropdown]
- STOCK NUMBER: Begins with [dropdown] [input] [clear]

Of all of the fields on the screen, only two are required, as indicated by their pink background. The system gives you a default profile number, which you can edit, if desired. You also need to enter a description. The easiest way to do this is to click on the popup button  next to the description field and select from the dropdown. There are many choices, so to narrow the list, just type in the first few characters of the name in the profile description before you click the button. In the example above, “ACETONE” is entered in the field, so when the popup button is clicked, it only returns the 3 records that begin with that word. You can select the appropriate record by clicking on the  button to the right.

Another way to narrow the search is to click the popup button and then use the filter fields at the bottom of the pick list. You can filter on many more fields than just the description; click the dropdown to explore. Then click the  button on the bottom.

Finally, note that if the profile description that you want does not already exist, you can always add one by clicking on the Add button on the profile list shown above.



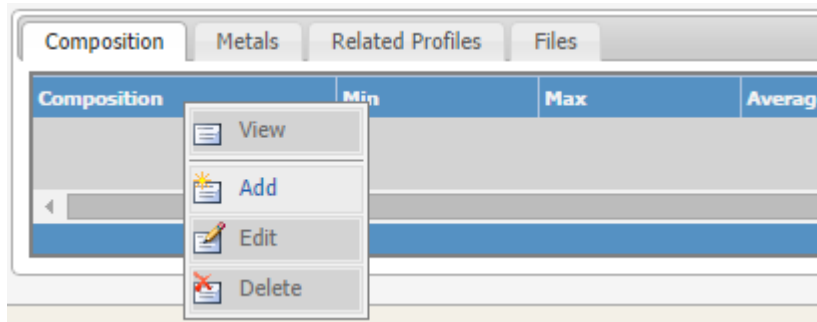
Note that the Profile table has five tabs where data can be entered. The tabs are located to the top left of the entry form. Fill in all other pertinent information either by typing it in or selecting it from the lookup tables  and drop-down lists.

To save the profile record click the save button at the top of the screen.

The screenshot shows the 'Waste Profile' application window. At the top, there is a toolbar with several icons. The save icon, which is a floppy disk, is highlighted with a red rectangular box. Below the toolbar, the form contains fields for 'Profile: 21188' and 'Description:'. There are also tabs for 'Page 1' through 'Page 5'. The main form area includes various input fields and checkboxes for 'Exemptions', 'Territory', 'Storage Code', 'Pickup Facility', 'Prop 65', 'TSDF', 'Lbs/Ft3', 'Project', 'Internal', 'Inactive', 'Approval Date', 'Lbs/Gal: 8.34', 'Pregen', 'Ship. Freq.', 'Re-certification Date', 'NAICS:', 'MSDS #:', 'Status', 'Flag Date', 'Chem Com.', and 'Letter Sent'.

How to add a Profile Composition

There are tabs at the bottom of the Profile form to record the composition, metals, related profiles and scanned files. To add or edit information in these tabs, position the cursor anywhere within the tab area. The cursor will change to a hand pointing a finger. Right-click and select add (or edit).



A Composition screen will display:

The screenshot shows a dialog box titled 'Profile Components / Constituents'. It contains the following fields and options: 'Name:' (text input), 'Min:' (text input), 'Max:' (text input), 'Average:' (text input), 'CAS:' (text input), a checkbox for 'Physical Composition', and a checkbox for 'Contains UHC'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Click on the pop-up table button to the right of the name field to enter the name of one of the components, type it in by hand. Enter the information in the other fields and then click the

button.

Repeat this process for as many components as necessary to build the list of components:

Composition	Min	Max	Average	CAS	EPA Codes	UHC	Section
... ACID MIXTURE, HYDROFLUORIC	1	10	5.5	ASDF		0	
... HYDROGEN SULFIDE	2	8	5	7783-06-4		0	

How to Add a Waste Item

To add a Waste Item, select Waste Item from the Waste Quick Start screen. The Waste Item screen can also be reached from the main menu (Waste -> Waste Item). Click on the Add icon, or open the Edit Menu and select Add to add a record.

When a new record is added, there are a number of defaults that apply. Units default to gallons, container type to 'DM' (drum metal), physical state to solid, and classification to hazardous. These fields may be edited. If a Waste Item Name is selected from the Waste Chemical Name pop-up table, then the CAS # and EPA codes associated with that chemical are inserted into those fields. Except for Item ID and Accumulation Area, all the fields in the new record can be edited by typing directly into the fields or by selecting information from the pop-up tables. (You will learn below how to populate the Accumulation Area by transferring the waste item from the Actions menu).

Important: Be sure to save your Waste Item record when done by selecting Save from the Edit Menu or clicking on the Save Icon.

The screenshot shows the 'Waste Item' form with the following fields and values:

- ITEM ID: 15533
- Facility: AMERICAN CHEMICALS
- Location: (empty)
- Employee: (empty)
- Chem Name: #1060 SOLVENT
- Profile: (empty)
- Request #: (empty)
- Request Date: (empty)
- Pickup Date: (empty)
- Drum ID: 22979
- Accum Area: (empty)
- CAS #: GHB
- Compatibility: BHB
- Request Employee: (empty)
- Pickup Employee: (empty)

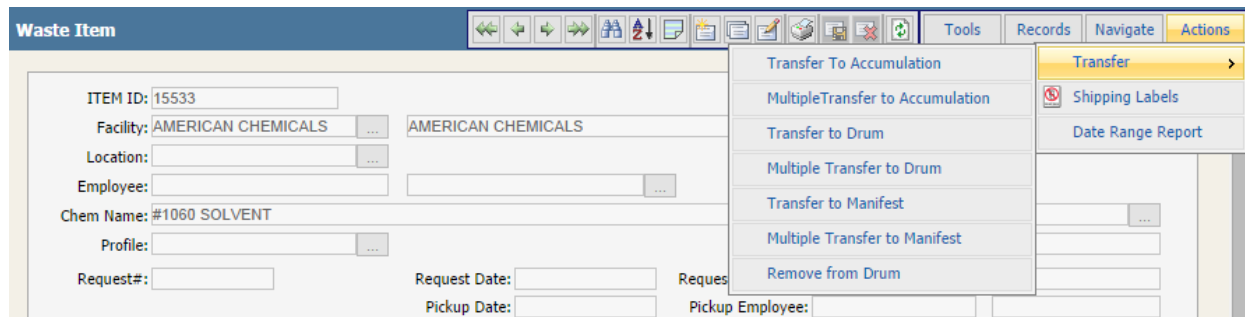
The 'Container' section includes:

- # of Cont: (empty)
- Size: (empty)
- Units: P POUNDS
- Type: (empty)
- Weight (lbs): (empty)

A red box highlights the 'Add' icon (a document with a plus sign) in the top toolbar.

Transferring Waste Items

Waste Items may be individually transferred to a Drum or an Accumulation Inventory Area by using the Actions\Transfer menu. Alternatively, you may transfer Waste Items from one Accumulation Area to another Accumulation Area or to a Drum using the Accumulation Area Transfer process. To do this, open a Waste Item record, and select Actions/ Transfer from the menu in the upper right.



Though Waste Items are added to the Drum Item/ Lab Packs List or Accumulation Item List as a result of a transfer, the original record for that waste item remains in the Waste Item table.

A Flag Date is populated in the Accumulation Area for the transferred item based upon a system setting. See your System Administrator to set this up.

Waste Drums vs. Waste Items

The Drum Table is used to store information about each drum or other container used to store waste materials in your facilities. Individual waste items and lab packs may be listed and associated with a drum as Drum Items/ Lab Pack Items. Drums can be transferred to other drums. The description of the contents of a drum may be entered using predefined Profile or Stream Records.

Individual drums may be transferred to an Accumulation Area for interim storage prior to disposal, or they may be transferred directly to a Manifest. Once transferred to an Accumulation Area or Manifest, the drum or container continues to be maintained in the Drum Table for reporting purposes. This reporting can be accomplished in conjunction with the Accumulation Inventory or Manifest Tables, or the reporting can be done directly from the Drum Table.

Lab Pack Items

The Lab Pack Items Table is used to store information on each Waste Item stored in a drum such as descriptive data, quantity, and location. Cost and charge back data are also available. Lab Pack Items are created either by transferring a Waste Item to a Drum or by directly adding a Lab Pack Item to the Drum Items/Lab Pack Items list. Once transferred, the detailed data is maintained in the Waste Items Table for reporting directly from the Waste Items Table.

How to Add a Waste Drum Record

1. From the waste quick start page, click on the Waste Drum icon in the Waste Inventory Tracking section. The Waste Drum page can also be accessed from the main menu (Waste -> Waste Drum).
2. Click the ADD button and screen for the new record will appear:

3. The system will assign a Drum ID. You can change this if you wish by just typing your Drum ID in the Drum ID field.
4. Click the pop-up button next to “Facility” and select your Facility.
5. Click the pop-up button next to “External Profile” and select the Waste Profile for this drum. This will cause many fields on the screen to be automatically populated with data from the Waste Profile.
6. Click the SAVE button to save your record.

7. You may assign the Drum to an Accumulation/Storage Area at the time the Drum record is created. After you click the Save Icon, you will be presented with a Transfer to Accumulation Area screen. If the container will be held in a specified Accumulation Area, you may select an Accumulation Area from the pop-up table at this time. Click on OK to transfer the Drum and save the Drum record, or click on Cancel Transfer to cancel the transfer operation but save the Drum record.

How to Add a Drum Item or Lab Pack Item to a Drum Record

Items may be added to the Drum Items/ Lab Pack Items List either by using the Action menu, or by direct entry onto the Drum screen. Direct entry is accomplished in the following way:

1. To add Items to the Drum, click the 2nd tab—Drum Items/Lab Packs
2. Place the cursor anywhere over the Drum Items/ Lab Pack Items list and right-click to get a sub-menu with the options: View, Add, Edit and Remove From Drum.

The screenshot shows the 'Waste Drum' software interface. At the top, there is a toolbar with various icons and buttons labeled 'Tools', 'Records', 'Navigate', and 'Actions'. Below the toolbar, the 'Drum' record is displayed with fields for 'DRUM ID: 23078', 'Accum. Area:', 'Tank:', 'Manifest:', 'Transferred to Drum:', and 'Other ID:'. The interface has several tabs: 'Drum', 'Drum Items/Lab Packs', 'Drum Details', and 'Screening'. The 'Drum Items/Lab Packs' tab is active, showing a table with columns for 'Item ID', 'Name', 'Quantity', 'Units', 'LBS', and 'Cont. Size'. The table is currently empty, with a message 'No records found. Click here for options'. A context menu is open over the table, showing options: 'View', 'Add', 'Edit', and 'Remove From Drum'. Below the table, there is a section for 'WASTE DRUMS' with columns for 'Drum ID', 'Status', and 'Shipping Description'. A help icon is visible in the top right corner.

3. Click the pop-up button next to the Chemical Name field, and select the chemical name.
4. Fill in the other fields as appropriate, using the pop-up buttons to select data, or just type directly into the field.
5. Click on OK, and the item will be added to the Drum record.

How to Add a Waste Manifest

Click on the **Waste** option located on the EMS main menu bar and select **Manifest** to display the Manifest screen.

1. Click Waste/ Manifest.
2. Click the Add button on the top right menu and the screen for a new record will appear:

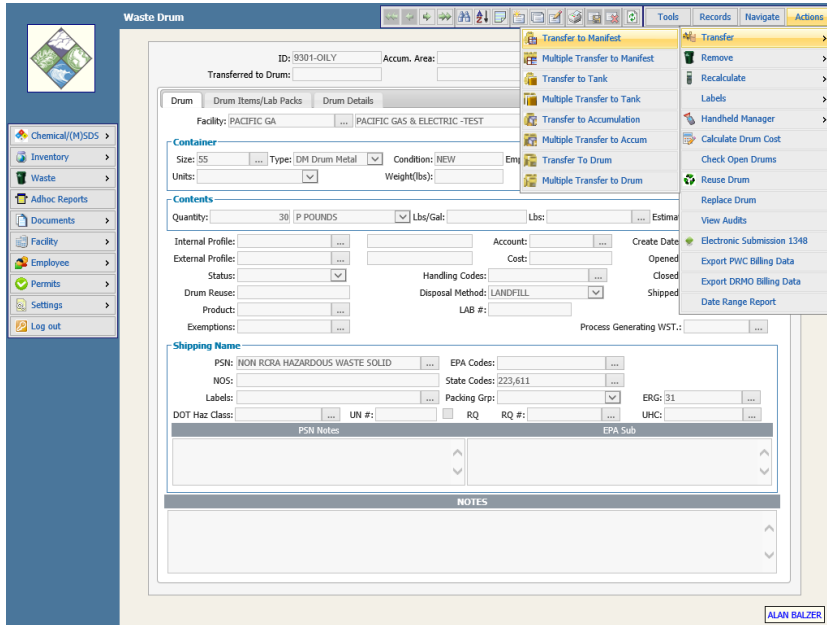
The screenshot shows the 'Manifest' software interface. The window title is 'Manifest'. The top menu bar includes 'Tools', 'Records', 'Navigate', and 'Actions'. The main form has three tabs: 'Manifest', 'Manifest Item / Load', and 'Final Disposition'. The 'Manifest' tab is active, showing fields for 'Uniform Manifest #', 'Doc #' (21832), 'Internal ID' (3162470), 'Incoming/Outgoing' (OUTGOING), 'Flag' (OPEN), 'Manifest Returned', and 'Manifest Reference#'. Below these are sections for 'Generator Facility' (Pickup, Parent, Invoice, Cert, Territory, Region, Unit, Trans Class, International Shipment, Signature, Date (3/31/2014), Date Leaving U.S., Port of Entry/Exit, Off-Site Manifest #) and 'Transporter Information' (Truck ID, Signature, Date for 1-4 trucks, TSDF, Cost). At the bottom are sections for 'Handling Instructions / Additional Information', 'TSDF Discrepancies and Notes', and 'Pickup Instructions and Notes'. A 'Log out' button is in the bottom right corner.

3. Type in the State DOC#.
4. Click the pop-up button next to “Generator Facility / Pickup” and select your Facility.
5. To add Manifest Items, click the 2nd tab—Manifest Item/Load
6. Right-click at the bottom of the screen, in the gray area under “Manifest Items”, then click ADD.
7. Click the pop-up button next to the External Profile field, and select your External Profile. This will result in the system auto-populating many of the data fields.
8. Enter the information for your manifest item then click OK.
9. Click the SAVE button to save your record.

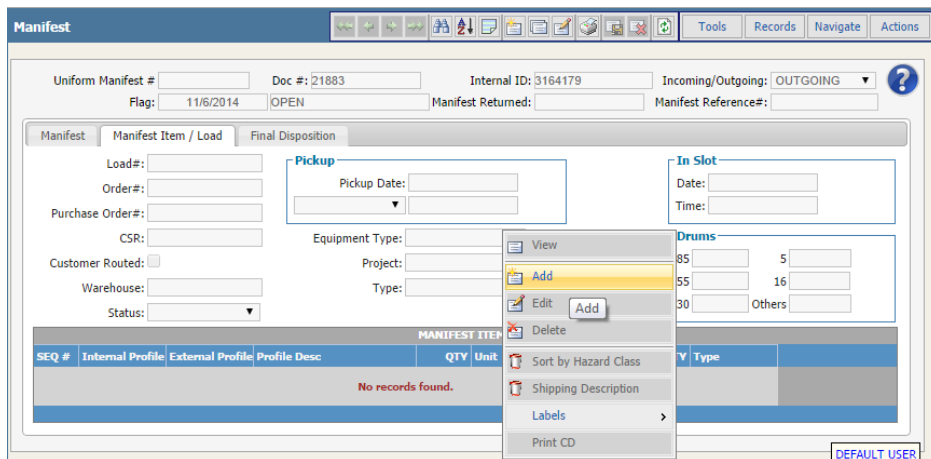
How to Add Manifest Items

There are two methods for adding Manifest Items to a Manifest record.

1. Open the Drum screen, and find the Drum (or drums) you wish to put on the Manifest. Click Action/ Transfer to Manifest



2. Open the Manifest screen. Click on the Manifest Item/Load tab. Position the cursor anywhere over the **Manifest Items** list and click the right mouse button. Choose add from the sub-menu, and the system will display the **Manifest Items** screen.



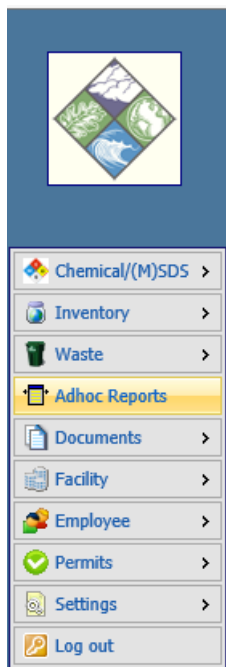
Section Seven: EMS Ad Hoc (Management) Reports

How to View and Print Ad hoc Reports



At the bottom right of the Quick Start Menu, under the heading **Report Center / Favorites**, you will see a list of reports. These are reports that you can select as your favorite reports, and you will always see them when you log in to EMS. To run any of them, just click on the report's name and a report preview window will open. Click the **X** on the top right of the report preview window to close it. To see a list of all Ad-hoc reports, click the **Report Center** header.

Alternatively, you can click on Ad-hoc Reports from the EMS main menu on the left side of the screen. You can then click on a specific report to launch a preview window. From there you can print a hard copy.



To preview any report, just click once on the report's name from the list of reports. From the preview window you can select a printer and print a hard copy.

Report list

#	Title	Type	Category	Date	User	Export
<input type="checkbox"/>	GAS INVENTORY		CERS	12/2/2013		menu
<input type="checkbox"/>	INVENTORY MANUFACTURER NAME-CAS-DENSITY-		CERS	12/2/2013		menu
<input type="checkbox"/>	INVENTORY WITH NO CONTAINER TYPE		CERS	12/2/2013		menu
<input type="checkbox"/>	INVENTORY WITH NO UFC OR HAZCLASS		CERS	12/2/2013		menu
<input type="checkbox"/>	LIQUID INVENTORY		CERS	12/2/2013		menu
<input type="checkbox"/>	SOLID INVENTORY		CERS	12/2/2013		menu
<input type="checkbox"/>	EmployeeForm_Basic		EMPLOYEE	12/2/2013		menu
<input type="checkbox"/>	buildingform_BASIC		FACILITY	12/2/2013		menu
<input type="checkbox"/>	facilityform_BASIC		FACILITY	12/2/2013		menu
<input type="checkbox"/>	locationform_BASIC		FACILITY	12/2/2013		menu
<input type="checkbox"/>	REPORT OF TENANTS AND LOCATIONS		FACILITY	7/15/2014		menu

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Main Menu

- Add new report...

Search

Search

Filtering

- Show all
- Show favorites
- CERS (6)
- EMPLOYEE (1)
- FACILITY (4)
- Inventory (9)
- MSDS (2)
- WASTE (20)

Filtering Reports by Category

- Click on any of the listed categories under filtering. The Ad hoc reports system will list only the reports under that category. You can create as many Categories as you like.

Report list

#	Title	Type	Category	Date	User	Export
<input type="checkbox"/>	CHEMICAL LIST BY BUILDING - USER		Inventory	7/12/2014		menu
<input type="checkbox"/>	Chemicals by Building		Inventory	12/2/2013		menu
<input type="checkbox"/>	Chemicals by Hazard Class		Inventory	7/14/2014		menu
<input type="checkbox"/>	Chemicals by Regulation		Inventory	7/14/2014		menu
<input type="checkbox"/>	containerform_BASIC		Inventory	7/15/2014		menu
<input type="checkbox"/>	Flammable Chemicals		Inventory	7/14/2014		menu
<input type="checkbox"/>	Inventory		Inventory	12/2/2013		menu
<input type="checkbox"/>	InventoryForm_BASIC		Inventory	12/2/2013		menu
<input type="checkbox"/>	P65 Chemicals		Inventory	7/14/2014		menu

Main Menu

- Add new report...

Search

Search

Filtering

- Show all
- Show favorites
- CERS (6)
- EMPLOYEE (1)
- FACILITY (4)
- Inventory (9)
- MSDS (2)
- WASTE (20)

AD HOC (MANAGEMENT) REPORTING MODULE

The Ad Hoc Reports Module is a full-featured report builder giving you access to every field in the system, and offering both a “Basic” view for creating simple reports, as well as an “Advanced” view allowing experienced users to craft more complex reports.

Once a few useful reports have been created, users can also easily create new reports by copying existing reports.

Editing an Ad hoc Report - Summary

To open a report for editing (and copying to create a new report), select the “Menu” button to the right side of the report, then select “Edit” from the menu that opens.

Report list

#	Name	Type	Category	Date	User	
<input type="checkbox"/>	AccumulationInventoryFORM_BASIC		Waste	6/19/2013		menu
<input type="checkbox"/>	DRUM COSTS		Waste	7/1/2013		menu
<input type="checkbox"/>	DRUMFORM_BASIC		Waste	6/28/2013		menu
<input type="checkbox"/>	ITEMFORM_BASIC		Waste	6/19/2013		menu
<input type="checkbox"/>	ITEM		Waste	6/19/2013		menu
<input type="checkbox"/>	ITEMS-COST		Waste	7/1/2013		menu
<input type="checkbox"/>	ManifestFORM_BASIC		Waste	7/1/2013		Edit Delete Rename Set/unset favorite Set in advanced mode
<input type="checkbox"/>	Open drums		Waste	7/1/2013		
<input type="checkbox"/>	Profile per cost		Waste	6/28/2013		
<input type="checkbox"/>	ProfileForm_BASIC		Waste	6/19/2013		

Main menu

- Add new report...
- Dashboard

Search

Filtering

- Show all
- Show favorites
- Waste (12)
- WASTEQS (7)

The report customization screen will open:

When the report opens, select “Save As”.

Input report name

Category

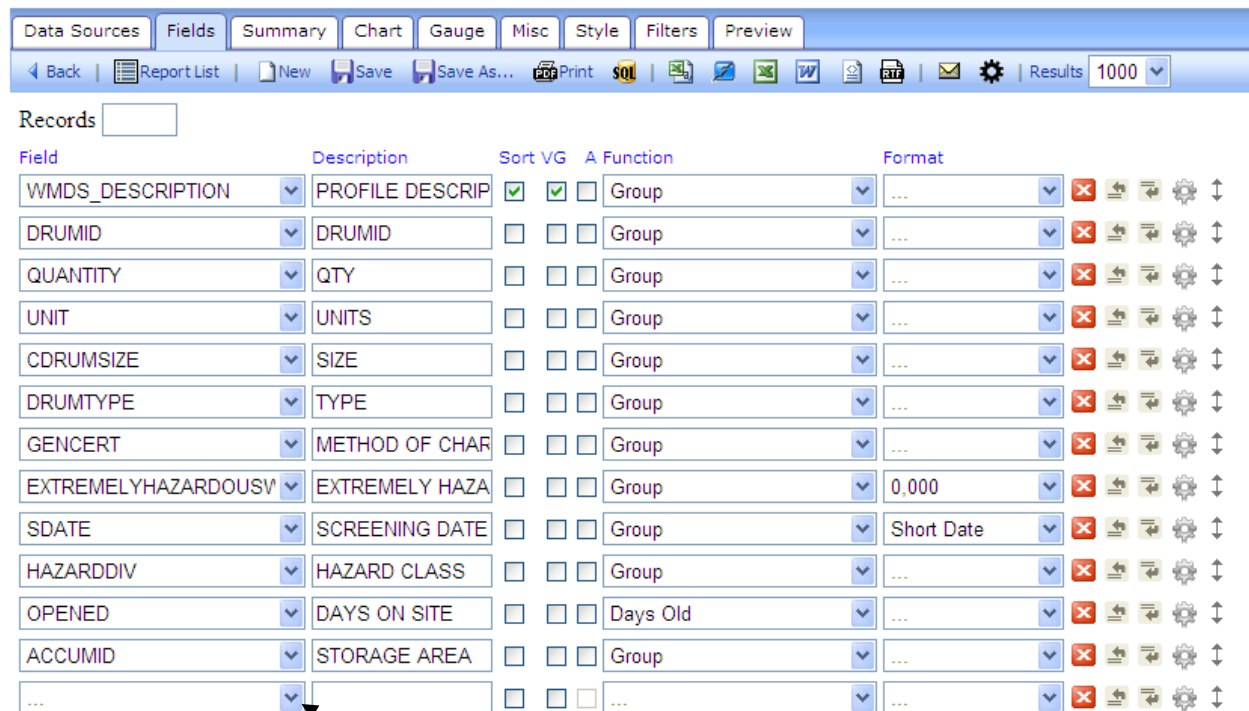
Type in a name for your new report
 Click the down-arrow to select a Category so you can quickly find this report later
 Click the OK button

Editing an Ad hoc Report - Details

Click on the “Design Report” icon next to the report name.

36	<input type="checkbox"/>	CONTAINER DATES	WASTE	7/1/2010			aje
37	<input type="checkbox"/>	DAILY OPERATING LOG	WASTE	7/1/2010			aje
38	<input type="checkbox"/>	DRMO REPORT	WASTE	7/2/2010			design report

The report will open to the “Fields” tab, as shown below, which shows the fields that are currently on the report.





Field	Description	Sort	VG	A	Function	Format
WMDS_DESCRIPTION	PROFILE DESCRIP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Group	...
DRUMID	DRUMID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
QUANTITY	QTY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
UNIT	UNITS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
CDRUMSIZE	SIZE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
DRUMTYPE	TYPE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
GENCERT	METHOD OF CHAR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
EXTREMELYHAZARDOUSV	EXTREMELY HAZA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	0,000
SDATE	SCREENING DATE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	Short Date
HAZARDDIV	HAZARD CLASS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
OPENED	DAYS ON SITE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Days Old	...
ACCUMID	STORAGE AREA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To ADD a new field, click the down-arrow next to the blank field at the bottom of the “Field” column, and select the field you wish to add.

In the “Description” column you will see the column header that will print on the report. You may change this if you wish.

To DELETE a field from the report, click the  button to the right of the field.

To INSERT a field above or below another field, use these buttons:  

To change the QUERY/SEARCH CRITERIA for this report, click the “FILTERS” tab:

Filter Field	Operator	Value(s)	Blank Param
1 QUANTITY	Is Greater Than	0.00	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
2 SDATE	Between	06/01/2010 And 06/30/2010	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
3	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Show Filters In Report Description

Require ... Parameters in Viewer

Filter Logic Ex:(1 OR 2) AND (3 OR 4)

Preview

Select a field for the Query by clicking the down-arrow in the “Filter Field” column.

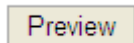
Select an Operator (for example: “Is Greater than”) by clicking the down-arrow in the “Operator” column.

Enter the Value(s) to query for in the “Values” column.

Click the Save button (OR Save AS button to save the report under another name):



Click the Preview button to preview your new report:



1. Double-click on the report you wish to print.

[How to Clone an Ad hoc Report](#)

1. Click on Ad hoc Reports from the main menu
2. Click once on the report you wish to clone
3. Click the CLONE button
4. Type in a name for your new report and click OK.
5. Click on your report and click the DESIGN button to edit it.
6. Click the SAVE button on the Design screen to save your changes.

How to Create a New Ad hoc Report

- Click on Ad hoc Reports from the main menu
- Click the Create New Report button.
- Type in a name for your new report, select the Category of data, and select the Data Source. Click the CONTINUE button.

The screenshot shows a web interface for selecting data sources. The main area is titled "Data sources" and is divided into two columns: "Categories" and "Datasources". A dropdown menu is set to "Basic".

Categories	Datasources
Accident/incident	Corrective Actions
Audit	lamain, Employee
Backup	Incident
Bol	Incident - Accident Employee
Chemical Reference	Incident Detailed
Doc Manager	
Employee	
Facility	
Materials	
Msds	
Permit	
Safety Inspection	
Task	
Waste	

Below the selection area, there is a "Next ->" button and a checked checkbox labeled "Show only basic fields".

At the bottom, there is a copyright notice: "Copyright © 2010-2014 | SFS CHEMICAL SAFETY, INC." and a small logo.

- Select data fields for your report on the Columns tab. Double-click on a field to select it. To UN-select a field click on it in the "Report's Columns" section, and drag it out of that section.
- Click on the Sort or Group tabs to select fields to Sort or Group by. Double-click on a field to select it for Sorting or Grouping.
- To enter Header or Footer information, click on the Header and Footer tab.

- To change the appearance of the report, such as Portrait vs Landscape, click on the Settings tab.
- To select specific data, click on the Data Selection tab. Click the ADD button, and select your query criteria.
- Click the SAVE button to save your new report.
- Click the PREVIEW button to see your new report with data.
- Click the EXPORT button to export the report with data to Excel, PDF, or a Text file.

Section Eight: EMS User Accounts and User Preferences

Creating a User Account

If you need to create a user account:

1. Login to EMS with an account that has sufficient privilege
2. Create **location** records, using the Facility/Building/Location hierarchy
3. Create an **employee** record for each user account, specifying the employee's name and location.
4. Create a **user** account, where you specify:
 - A login name and password (required)
 - An associated employee record (required)
 - Access Rights to all modules (defaulted)
 - A default QuickStart screen (optional)

It is important not to confuse Employee records with User accounts. Each User account is linked to an employee record. If an employee is no longer with the company, you can delete the user account and mark the employee record as "inactive". You should not delete the employee record as this will leave holes in your data. You can set the EMS user permissions so that only administrators have the ability to delete employee records.

Setting Access Rights using Groups

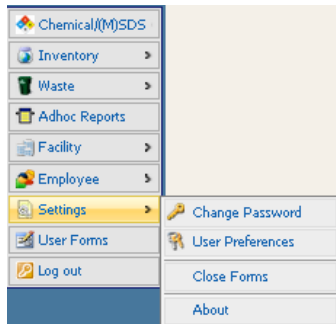
EMS Groups are the easiest way to set and main access rights. Users can be placed in Groups and inherit the specifications, such as default QuickStart screens and all access rights.

Thus it is useful to think through the **roles** of the various EMS users and create a Group for each role. Some examples of roles are:

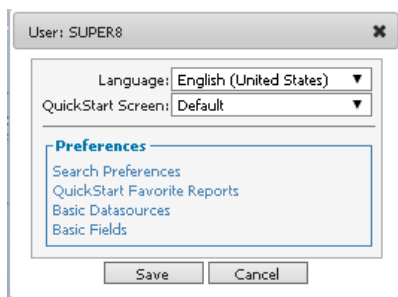
- EMS administrator – full access and admin rights
- Data entry – view/edit/add rights
- Data reader – view only rights
- Manifest printing – access to the manifest module
- Radiation Safety Officer – access to the Radioisotope module

Setting User Preferences

These are functions that both Admin and Non-Admin users can access to change certain options specific to their own user id. EMS users can access and customize their settings from the main menu on the left side of the screen:



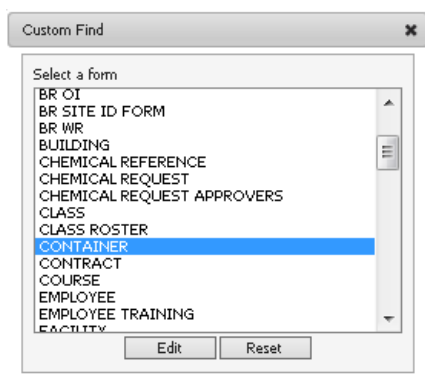
Select Settings -> User Preferences



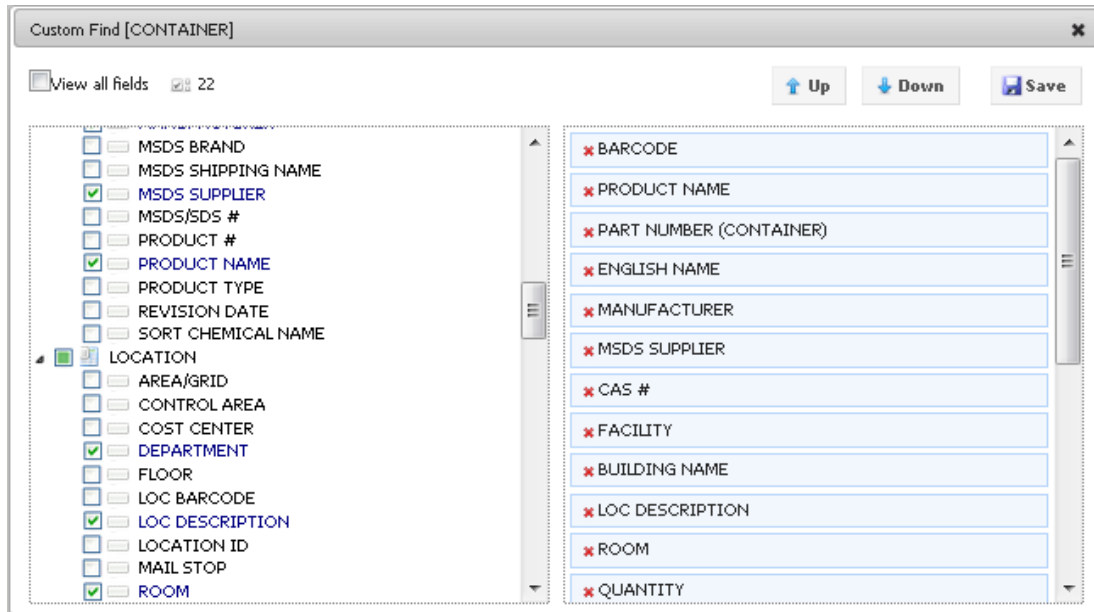
Users can configure which quick start screen will launch when EMS starts as well as customize search and favorite report settings.

Search Preferences

The Search Preferences link allows the EMS user to customize individual search screens to suit their needs. Click on Search Preferences and select the search screen that you wish to customize by highlighting it and clicking on Edit.



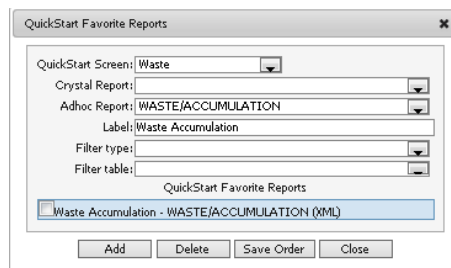
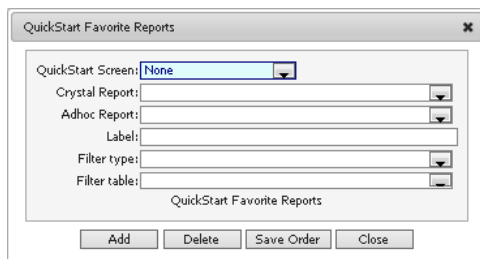
From the Custom Find screen, users can add, remove and reorder search fields.



To add a field, click in the check-box on the left side. To delete a field, click on the red X on the right side. To move a field up or down, highlight the field on the right side and then click on Up or Down. Alternatively, fields can be dragged and dropped into the desired position/ order.

Configuring the Favorite Reports List

Users can configure up to six Crystal Reports or Ad hoc reports for each quick start screen. Click on **Quick Start Favorite Reports** and then select the appropriate quick start screen from the dropdown list. Next, select a report from the Crystal Report or Ad-hoc Report dropdown list. Fill in a name for the report in the Label field. Regardless of the actual name of the report, the custom name that you type into the Label field will appear on the quick start screen. Repeat the procedure to add additional reports.



Section Nine: Where to Get Additional Help

Visit the Chemical Safety EMS help pages at **<http://chemicalsafety.com/support/>** where you can view knowledge base tutorials, training videos, and submit a trouble ticket if necessary.