**General Information**

- Forgotten Usernames and Passwords, as well as resetting Passwords, are handled by the local CT Administrator.
- Auditing by uploading a list of barcodes is deferred to a future upgrade and for now can be done in v3.
- CT Administrative functions and regulatory reporting are performed in v1.

**Navigation**

- Function buttons are at the top and window-specific-action buttons are at the bottom of the screen.
- Row Actions are in the left column.
- Browser Back and Forward buttons can be used to navigate.
- To Presearch a field value, type in the beginning characters and check the pull-down list.
- To clear fields, use the Clear selections button, backspace over the text, or pick the first (empty) value at the top of a pull-down list.

**ChemInfo & MSDSs**

ChemInfo is available to all CT Users, even without specific authority to access inventory.

To see ChemInfo, select ChemInfo at the top of the screen and search, or select the ChemInfo Action at the left of an inventory item in the Summary or Detail View. ChemTracker displays validated physical properties, physical hazards, health hazards, storage code, regulations and other identifiers from its reference database of over 35,000 chemicals and 107,000 synonyms.

Following the steps as above, select MSDS to view a third-party MSDS of the chemical(s) if your organization has a subscription.

**Searching for Inventory**

1. Press Search on the top navigation bar.
2. *Fields are organized by expandable and collapsible categories.*
3. Specify search values for the fields. Fields you can search on include:
   - Chemical Name
   - CAS number
   - Formula
   - Barcode number
   - Manufacturer
   - Product number
   - Storage Group
   - Building/Room
   - Owner
   - Department
   - Modified date
   - Expiration date
   - Regulation
   - User-defined fields
   - Hazard(s)
   - Location

4. To find inventory by Hazard(s), Regulations or Storage Group, the inventory item(s) must be linked to the reference database.
5. You can refine your search and narrow your results by entering more field values
6. *You can search by additional, multiple hazards by entering the first letter of hazards repeatedly after you select a value from the drop-down box.
7. *You can search by Regulation by selecting the Regulation Type, Class and ID.
8. Perform the search by clicking Search at the bottom of the screen. Results will match ALL criteria selected and the first 500 are displayed in the Summary View. Scroll down to see 250 additional values with each scroll.

**Summary and Detail Views**

1. *Storage Group is among the fields shown in the Summary View.
2. *For linked items, the Summary View shows the Main Name of chemicals as they are in the CT database so the records can be summarized. The Details View shows the Chemical Name as it was entered into CT.
3. *Summary View displays metric units. In the Details View, you see units as entered, either English or metric. You can select between metric and English units for display in each View using the Change units button.
4. Sort columns by pressing the small triangles to the right of the column header.
5. Move columns by clicking and dragging the column header to another location.
6. Press Hide/Show Columns at the bottom to change the columns you see displayed.
7. *Select one or all rows in Summary View to Download to Excel on a Mac or pc. In Details View, you can select any number of contiguous or non-contiguous rows to Download. If you do not have a version of Excel that accepts .xlsx, go to Desktop Setup on the Help page.

**Linking**

- It is important that items in inventory are linked to CT’s reference database which contains the safety and regulatory information.
- Items are linked automatically upon entry or update when Chemical Name + Physical State, or CAS + Physical State, or Manufacturer + Product Code match the database’s and don’t conflict with each other. Linked items display a number in the GDN field.
- Items can also be linked manually in a process called SAMONSing performed in v1.

**Templates**

- Create Search Templates and Add Inventory templates: Give them titles and descriptions.
- Templates are executable from the home page and the appropriate function page.
- *You can Load, Execute, and Delete Saved Searches.
- Tip: Create a template, load it and change the room (or other fields) to make one template easily function as many!
1. Press **Add** in the top navigation bar.
2. On the **Add Inventory** screen, complete the 9 required fields at the top (Owner, Department, Building, Room, Chemical Name, Physical State, Container Count, Amount, Units).
3. Use pull-down menus when you can to:
   - Help you enter validated data
   - Link your item to the reference database (using certain fields)
   - Auto-populate data from the reference database into other fields (in some cases).
4. Enter information into other fields as appropriate.
5. Press **Add Inventory** at the bottom.

**TIPS**
- Try to enter the Manufacturer and Product Number first. If the combination is in the reference database, this may be the fastest way to get chemical information entered since other data will be auto-filled for you.
- Don’t add a CAS Number when adding a mixture.

Make updates to records after a Search to locate them. View the records in the **Details View**.

**Delete**
Select contiguous or non-contiguous record(s) and press **Delete** at the bottom.

**Duplicate**
If adding another container of an item already in inventory, search for the existing record, go to the Details View, select the record, and press **Duplicate**. You can duplicate more than one record at a time. Certain fields are not duplicated, such as Barcode and Expiration Date, as well as system-generated fields such as Created By.

**Changing Values in a Single Record**
1. Select a single record and press the **Modify** button. Values indicate whether they may be edited.
2. Enter the new value(s).
3. Press Save in the far left Actions column.

**Bulk Edit (changes to multiple records)**
Use this feature to make the same change(s) to multiple inventory items simultaneously, e.g., moving inventory to a new owner and/or location, or for storeroom receiving.
1. Select multiple items (do not have to be contiguous) and press **Modify** or **Modify all** at the bottom.
2. On the Bulk Edit screen, make your changes and press Save Modified Records.

This brochure is designed to give you the basic information you need to manage your chemical inventory using ChemTracker 4 (CT 4). **Changes from previous versions of CT are marked with an asterisk (*)**; important points are in bold.

Desktop requirements, browser settings, detailed instructions, screen shots, and examples can be found by pressing the Help button from within the application.

To **login**, go to chemtracker.stanford.edu and click **Members Access Links** (after February 3, 2014), or ask your ChemTracker Administrator for the link (before that date). Then select the CT 4 link for your institution. Enter your ChemTracker Username and Password, which are case-sensitive.

**Logout** under your UserID displayed in the upper right of the screen.