ChemTracker
The higher education collaborative for chemical inventory management

Stanford | Environmental Health & Safety

ChemTracker 4.0

Inventory Management User Guide

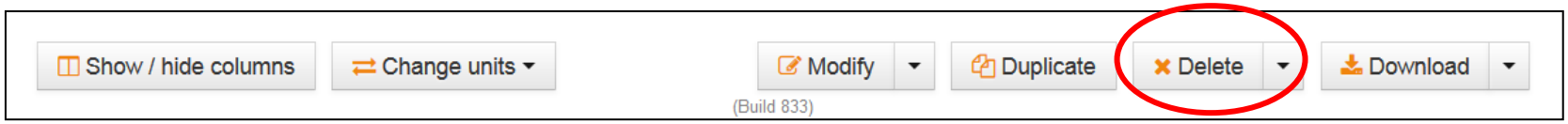
Part 4: Modify, Surplus

- Delete Inventory
- Duplicate Inventory
- Edit Inventory (Single Item)
- Bulk Edit for Multiple items
- Surplus

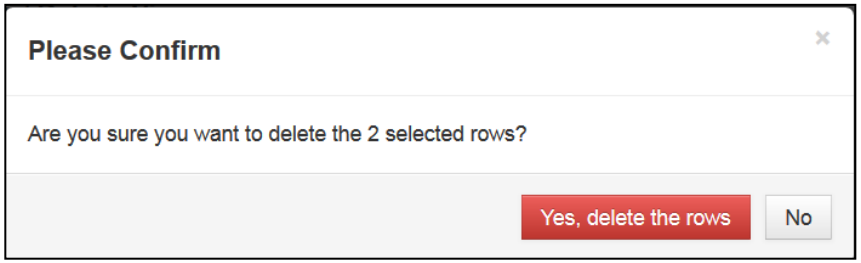
© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Delete from Details View

- With a search result in the Details View, select contiguous or non-contiguous item(s) for deletion; the selected rows change color.
- Click *Delete* at the bottom.



- This is one of the few places you will see a confirmation message.
- Select Yes or No.

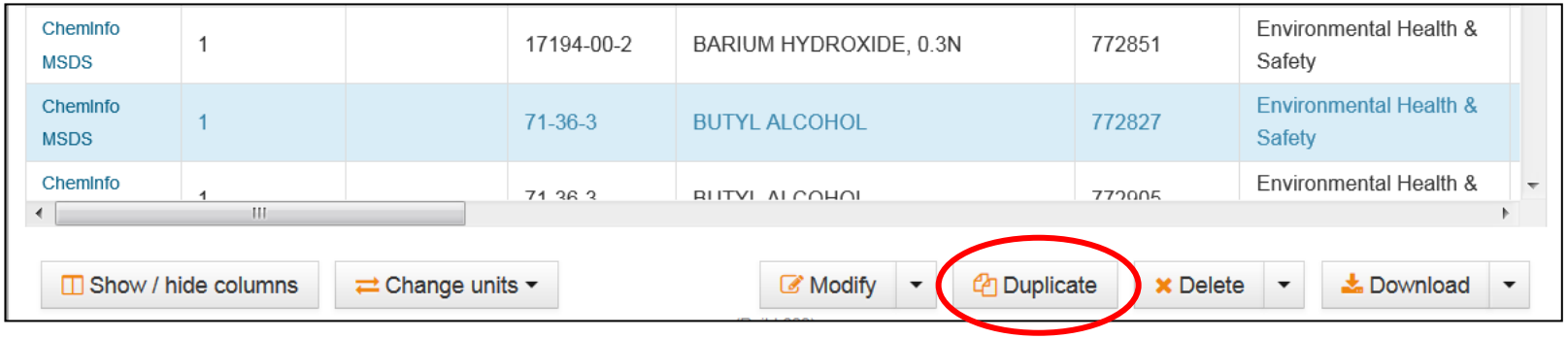


Note: If you have deleted an item or items in error, contact your local CT Administrator with information about the item(s) and the date deleted. Your CTA can restore deleted record(s) in Administrative Functions.

© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Duplicate a Record from Details View

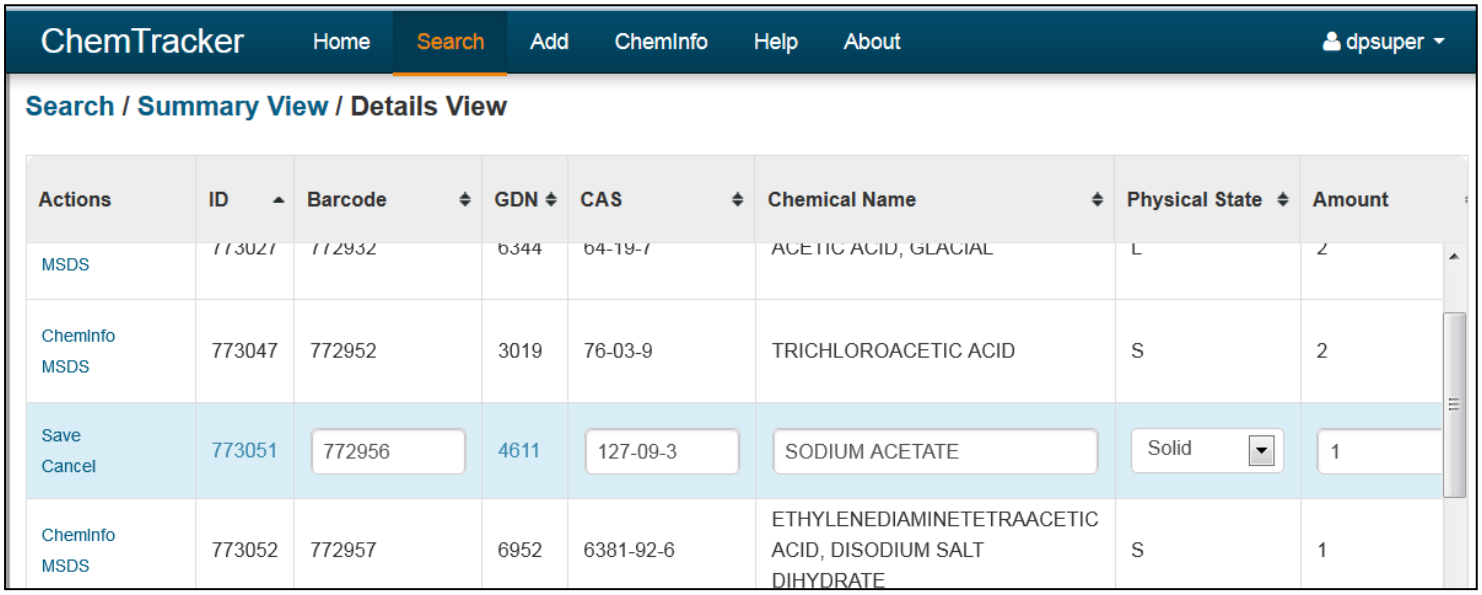
- A timesaver for adding inventory items is to duplicate an item that is exactly the same as the one you want to add.
- With the item in a search result in the Details View, select a **single row** and click *Duplicate* at the bottom. Indicate in the dialog box how many copies you want to make. CT will briefly display a confirmation that the item has been duplicated.
- Since the fields below are not copied, you will have to manually enter values.
  - Barcode number
  - Expiration and Received Dates
  - Surplus indicators
  - Inventoried By value
- System-generated fields such as Created by and Created Date are also not copied but generated anew by the system.
- To see duplicated items, you can sort view by Created (date).



© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Edit Single Record in Details View

1. With your search result in the Details View, select the record you want to change and press *Modify* at the bottom of the screen.



2. Change the value(s) in the desired field(s)
3. Press *Save* in the *Actions* column (leftmost column) when you are ready to make the changes.

© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Edit Single Record in Details View

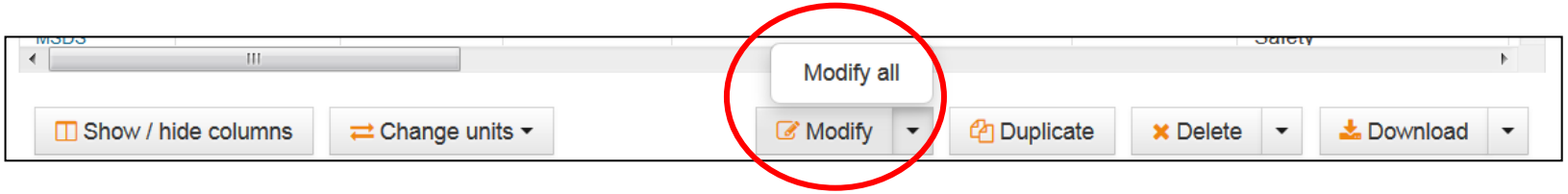
- **Tip:** Configure the Columns by hiding and moving them for easier editing and viewing of what you want.
- System-generated fields are not available for editing.
- Values of validated fields must be selected from a drop-down menu.
- Updating the Chemical Name or Physical State may trigger
  - The item to become linked to the reference database because these values now match a classified chemical; or,
  - The item to be un-linked from the reference database because these values now do not match any classified chemicals; or,
  - The linked item to be re-linked to a different classified chemical because the values now match a different classified chemical.
- If you change the CAS number to one not in the CT database, saving may change it back again if CT checks and finds a valid Chemical Name + Physical State and re-enters a valid CAS.
- Your changed item may no longer show in the Details View if it no longer meets the search criteria.

© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Bulk Edit from Details View

Change values for multiple records simultaneously

1. With your search result in the Details View, select the records, contiguous or non-contiguous, you want to change and press *Modify* at the bottom of the screen. Selected rows change color.
2. Or, press *Modify/Modify all* at the bottom if you want to change all the records in Details View.

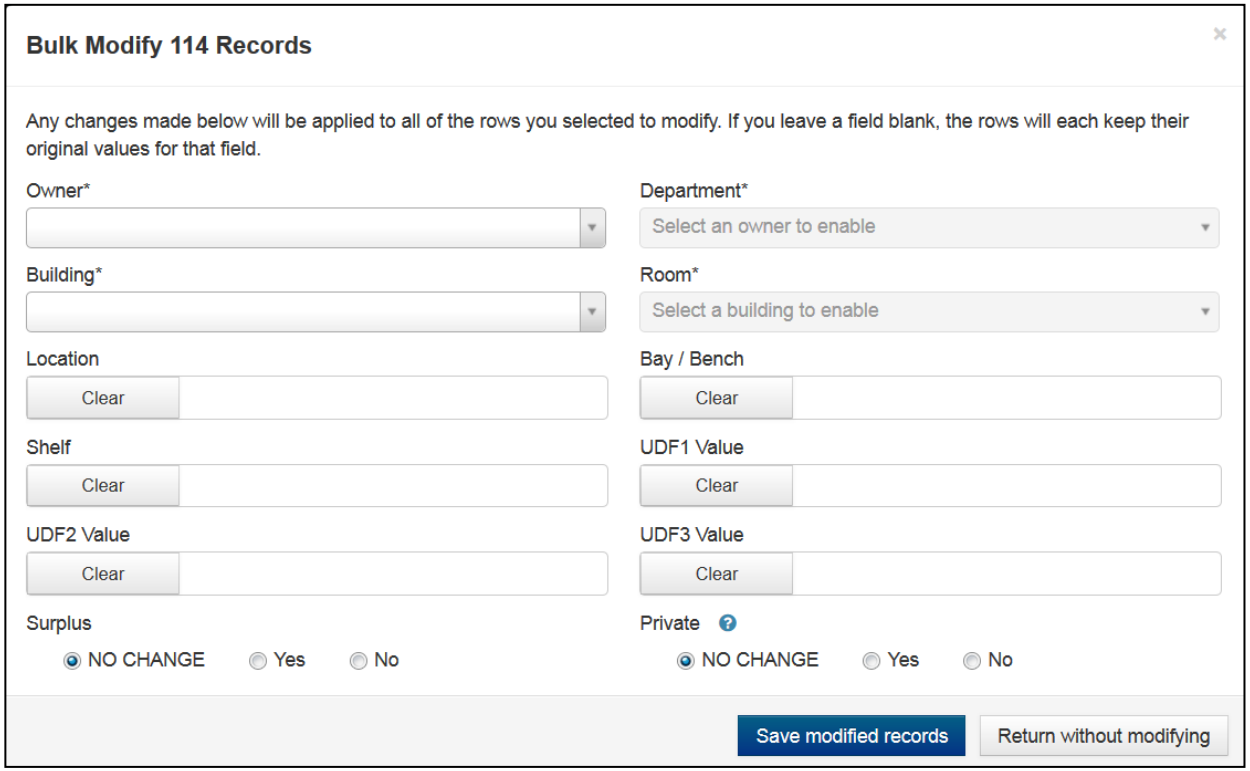


- Here are typical times to do a Bulk Edit
  - A PI is moving to another lab
  - Inventory moves to another PI
  - You have centralized storeroom checkout
  - Items become Surplus

© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Bulk Edit from Details View

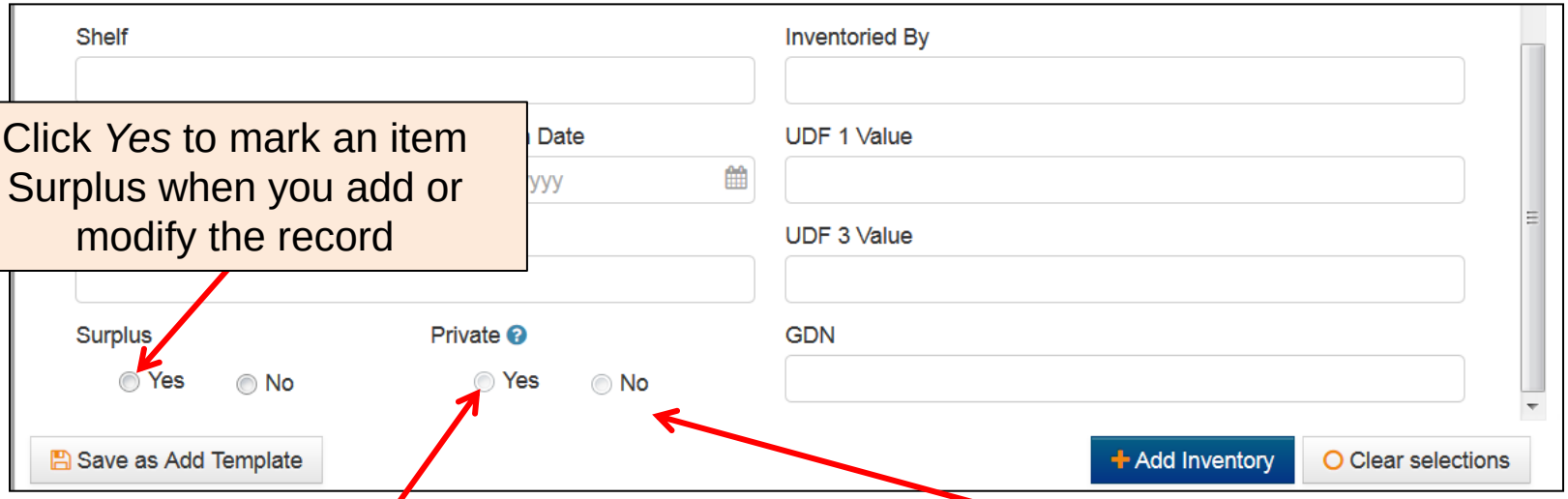
Change values for multiple records simultaneously



1. ChemTracker displays the fields that can be edited for the selected group of records. Make the desired changes. You need to have access to the Building/Room and Owner to which you are moving inventory.
2. Press *Save modified records* when you are finished. You will see a brief confirmation message.
3. If you press *Clear*, the values in that field will be deleted.

© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Surplus



Click *Yes* to mark an item Surplus when you add or modify the record

Restricted Surplus: If you mark the field Private = *Yes*, only those users who have access to the item's Owner and Location will be able to view it, but it is tagged as surplus.

Non-Restricted Surplus: If you mark the field Private = No, everyone in your organization who uses ChemTracker will be able to view this surplus item.

© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University

Thank you. We appreciate your continued support and use of ChemTracker.



Remember, for help….
Each ChemTracker institution has at least one ChemTracker Administrator to assist you,
and
there is a *Help* link on every ChemTracker page in the upper right.

© 2013 Stanford University. ChemTracker℠ is a registered Service Mark of the Board of Trustees of Leland Stanford Junior University