

# CIS PI User Guide

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## Log In

1. Go to [ehs.ucop.edu/cis](http://ehs.ucop.edu/cis)
2. Enter your campus login and password
  - o For technical support contact the ERM Service Desk at: [erm@ucop.edu](mailto:erm@ucop.edu)

## Adding Locations

1. Select the **Locations** tab from the top toolbar
2. Select the **Add Locations** link
  - a. The browser navigates to the **Add Location** screen
3. From the dropdown list, select the building containing the location you wish to add
4. Select the **Search** button
  - a. The building's information appears
5. Locate the room(s) you wish to add and select the respective checkbox(es)
6. When all desired location(s) have been selected, select the **Add Selected** button
7. Select the **Home** tab to return to the Home page

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If your building/room does not appear on the Locations drop down menu, please contact your campus CIS Administrator and the ERM Service Desk at [erm@ucop.edu](mailto:erm@ucop.edu) for assistance.

## Updating PI Information

1. Select **PI Information** tab from the top toolbar
  - a. The browser navigates to the **PI Information** page
2. Add/edit desired information
3. Select the **Save Changes** button

## Adding Authorized Users

1. Select **Authorized Users** tab from the top toolbar: the browser navigates to the **Contacts** page
2. Select the **Add Additional Contact** button
3. Enter the required data: Name, Email Address
4. Select the **Submit** button
5. The **Authorized User** will receive will an email with instructions on how to proceed

## Adding New Chemicals to the Inventory

### To Add New Items ONLY:

1. Select **Spreadsheet for Uploads** link from the toolbar on the left
2. Save the linked **Inventory Worksheet** to your computer
3. Complete **the Inventory Worksheet** with all chemicals you wish to add
4. Save the completed worksheet to your computer
5. Select the **Locations** tab from the top toolbar
6. Select the Room to which you wish to add the inventory
  - a. The browser navigates to the Room's Inventory page
7. Select the **Upload** button to upload the completed worksheet
8. The inventory is saved and now appears in the room's inventory

## Updating Existing Inventory

### To Update Existing Items Within the Inventory ONLY:

1. Select **Chemicals** tab from the toolbar on the left
2. Select the room where you wish to make changes
  - a. The browser navigates to the data for that room

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3. Select the **+** button to the left of the chemical name
  - a. You will be directed to the Chemical Information page
4. Select the **Lookup** button to the right of the Chemical Name field
  - a. The **Lookup** tool opens
5. In the Search field, enter the chemical name, CAS#, or physical state
  - a. From the dropdown choose **Contains**
6. Select the **Search** button
  - a. The list filters
7. To add a chemical/mixture, select the arrow to the left of the chemical name you wish to add
  - a. The selected chemical/mixture's information populates the inventory screen
  - b. *Note: If the chemical/mixture you wish to add is not in the **Lookup** tool, you may enter the information on this page manually*
8. Enter the storage information
9. When all information is entered, select the **Save Changes** button on the bottom of the page
  - a. The browser navigates to the Room inventory page showing that the chemical/mixture has been added to the inventory

## Using the Search Feature

The search feature can be used to look for an inventory item within a single room or within your entire inventory.

### To Search for a Specific Inventory Item/Chemical:

1. Select the **Chemicals** tab from the toolbar on the left
2. Select the building and room you wish to search for the inventory item. If you wish to search your entire inventory, select **All Locations**
3. In the search box at the top of the page, type in the key word(s) or numbers you know that coordinate with the item you are searching for. These can be partial chemical or CAS numbers as well.
4. Select the choice from the drop down to the right of the search box that corresponds with the type of search you are performing. The choices are:
  - a. Starts with
  - b. Contains
  - c. Exact
5. Select the **Search** button
6. The results will appear below the search box

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## Using the Copy Function

The copy feature can be used to add a chemical to your inventory that has very similar or the same characteristics of another chemical in your inventory. Once an item is copied, it can be edited.

### To copy an inventory item

1. Select the **Chemicals** tab from the toolbar on the left
2. Select the room that has the chemical you would like to copy
3. Find the chemical you wish to copy and select the **+** button to the left of the chemical name
  - a. You will be directed to the Chemical Information page
4. At the bottom of the page, select the **Copy Form** button
5. Make any edits to the form necessary and select **Save Changes** button
6. The copied chemical will now show up in the inventory list as a new inventory item

## Change Displayed Columns

The change displayed columns feature can be used to rearrange the current column order or add new field columns to your inventory table.

### To change the order of the columns on your inventory table:

1. Select the **Locations** tab from the top toolbar.
2. Select on a **building name and/or room** to display your inventory table.
3. Select the **Changed Displayed Columns** field located beneath the search button.
4. In the **Displayed Form Fields**, select the name of the column you would like to move.
5. Select the **Move Up or Move Down** option to place your column in its desired location.
6. Select the **Save** button located at the bottom of the **Display Options** box.

### To add a new column to your inventory table:

1. Select the **Locations** tab from the Top Toolbar.
2. Select on a **building name and/or room** to display your inventory table.
3. Select the **Changed Displayed Columns** field located beneath the search button.
4. In the **Not Displayed Form Fields**, select the column field you would like to add to your inventory table.

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- a) You can *select multiple fields* by holding down the *Ctrl key* on your keyboard while clicking the mouse.
5. Select the **Add to Display** button.
6. Your new fields will appear under your existing columns in the **Display Form Fields**.
7. Follow the instructions above to change the order of the columns on your inventory table.
8. Select the **Save** button.

## Transferring Chemical Inventory

The Change Room feature can be used to transfer chemical inventory between buildings/rooms.

1. Add the new **Location** you wish to move your inventory to (see adding a **Location** instructions)
2. Select the **Chemicals** tab from the toolbar on the left
3. Select the building and room you wish to move the inventory item from.
4. Find the chemical you wish to transfer and place a check mark in the check box column located to the right of the chemical inventory table (the column underneath the **Change Room** button)
  - a. You may also select multiple chemicals at one time to transfer inventory to a different room.
5. Select the **Change Room** button, once you have selected the chemical(s) you wish to transfer.
  - a. The building information appears
6. Select the building and room you wish to transfer the chemical(s) to.