Import Inventory by PI & Exporting an Inventory
How to use these features

• Import Inventory by PI offers labs a chance to upload their inventory based off an Excel spreadsheet on their own accord.
  • Fields include chemical name, location information, container information and others discussed further in this training.

• Exporting an Inventory allows labs to pull all information of a PI’s information into an Excel spreadsheet.
Import Inventory by PI
To get to the Import Inventory by PI function click on the Inventory tab shown here.
Click on this link to access the function’s main page.
This is the main page of Import Inventory by PI, but without an Excel sheet to put in to this page nothing can be done. If pressed, this button downloads a previously designed template.
After the Excel sheet is open both of these bars will pop up towards the top of the page. Enable both options to use the template to its optimal function.
This is the look of the template. The fields in Red are required whereas those in Gray are not required but encouraged. The following slides will give descriptions of each field and its importance.
This subsection of fields is related to the PI and is broken down below.

PI Code: The PI’s Kerberos ID needs to be put in every row that there is data.

PI Last Name: The PI’s Last Name needs to be put in every row that there is data.

PI First Name: The PI’s First Name needs to be put in every row that there is data.

Since this is a repetitive process a suggestion would be to do it once and drag them all down after the other fields have been completely filled out.
## Storage Information

**Bldg Code:** The building number. (Ex. 4 or NW61)

**Lab:** The lab room number formatted as (bldg.-room or NW61-124)

**Location Type:** This is a searchable dropdown to choose from places like a Flammables Cabinet or a Bench Area.

**In–Lab Location:** Customizable location space within EHSA specific to each room. If there are questions about this function see the Locations Manual for a full explanation.

<table>
<thead>
<tr>
<th>Bldg Code</th>
<th>LAB</th>
<th>Location Type</th>
<th>In-Lab Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the building number into this column. (i.e. 66 or NE47)</td>
<td>Enter the lab room number here. (ex. 66-347)</td>
<td>Searchable dropdown list to choose a listed storage type.</td>
<td>If your lab has a lab specific location approved by the EHS Office put that here.</td>
</tr>
<tr>
<td>Chemical Name</td>
<td>Physical State</td>
<td># of Containers</td>
<td>Amount per Container</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------</td>
<td>----------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Enter the chemical name from the vendor here.</td>
<td>Choose between Solid, Liquid, or Gas.</td>
<td>How many bottles in the lab.</td>
<td>Quantity of the chemical in a container.</td>
</tr>
</tbody>
</table>

**Chemical Information**

**Chemical Name:** Be sure to spell correctly when typing those long chemical names.

**Physical State:** Use a capital first letter for Solid, Liquid, or Gas.

**# of Containers:** How many bottles of this do you have (easiest to put 1)?

**Amount per Container:** The volume of chemical that is housed in each container. (i.e. If the container is for 25 mL, then put 25 in this field.)

**Unit of Measure:** This is a searchable dropdown that is specific to a certain physical state. Be sure that the physical state here matches the one that is put in the physical state field.
CAS #/Vendor/Catalog #

Cas #: Type the CAS # for the chemical into this field being sure to type it in correctly and to fix any mistakes in formatting before uploading.

Vendor: This is a searchable dropdown list that you can search for the vendor of your product for. If there the spreadsheet will change the vendor’s name to a unique code. This is so the system can recognize over 1900+ vendors a little easier so don’t fret over that. There is also a function ( =vendConv() ) that can be used for large amounts of data. If a vendor can’t be found contact the EHS Office and this can be rectified.

Catalog #: Enter the catalog number provided by the vendor here without typos.
### Miscellaneous Dates

**Receipt Date:** This is the date received in lab and is equivalent to the container open date within the system.

**Expiration Date:** Provided by the vendor. Highly suggested for peroxide forming agents to put the expiration date as a reminder to the lab.

**Date Entered:** The date that the upload happened.

***Make sure all dates are in the form MM/DD/YYYY***

**Comments/Contact:** Text boxes to add any other information necessary (Comments) and to track who added the chemical to the uploader (Contact).
BARCODE
This is where new or existing barcodes should be entered so that they remain constant in the system.

Barcode
This field should only be filled out by labs that use barcodes to help them keep their inventory. You can scan your barcodes into the correct cell or enter them manually, just be sure that the number in the cell is the correct number.

When uploading the difference between filling this field out and leaving it blank is acknowledged and is explained on the next slide.
1.) With the template filled out, the next step is to upload your data into the system. In order to do this come back to this page. Where the PI and Permit should be auto-populated.

2.) Once the PI and Permit are set up press this button and choose the saved chemical inventory template previously created. This will then load into the system and will be displayed as such.

3.) If this checkbox is empty it adds the chemicals to the current inventory, but if it’s filled out the current inventory is replaced with these chemicals so BE CAREFUL.
4.) If this checkbox is filled in the system will auto-generate barcodes for each chemical, but if you filled in the field from the last slide uncheck these to use the barcodes that can be scanned.

5.) If there is something wrong with the data put in the template a warning will show up as it is here. The row with an incorrect entity will be highlighted in a bright red to catch the eye.

6.) When everything is all set on this page use this button to enter the upload into the system.
Exporting an Inventory
Once again under the Inventory tab, go under the link ‘Quick Chemical Entry and Search to access your Inventory Export’.
Under ‘Chemical Inventory Reports,’ select the report labeled ‘MIT Chemical Inventory Excel Report.’ A pop-up will then populate your screen.
Your PI should populate this field, but if for some reason this doesn’t happen search for their last name in this box. After this field is correctly populated, press on the green button labeled ‘View Report’ to access the Excel spreadsheet.
Once downloaded, this is the format of the spreadsheet. It is the same setup as the import template without the dropdowns so this spreadsheet can be used to import data into the system.

<table>
<thead>
<tr>
<th>PI CODE</th>
<th>PI Last Name</th>
<th>PI First Name</th>
<th>Bldg Code</th>
<th>LAB In-Lab Location</th>
<th>Location Type</th>
<th>Storage Location</th>
<th>Storage Device</th>
<th>Chemical Name</th>
<th>Chemical Description</th>
<th>Physical State</th>
<th>Physical State</th>
<th># of Containers</th>
<th>Amount per Container</th>
<th>Unit</th>
<th>Unit of Measure</th>
<th>CAS #</th>
<th>Vendor</th>
<th>Catalog #</th>
</tr>
</thead>
<tbody>
<tr>
<td>n2vesal</td>
<td>Veal</td>
<td>Laurie</td>
<td>N2</td>
<td>N2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Paraformaldehyde</td>
<td>Aqueous::Liquid</td>
<td></td>
<td>1</td>
<td>50</td>
<td>ML</td>
<td>SIGMA-A</td>
<td>1.00-0</td>
<td>SIGMA-</td>
<td>idk-123</td>
</tr>
<tr>
<td>n2vesal</td>
<td>Veal</td>
<td>Laurie</td>
<td>N2</td>
<td>N2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Paraformaldehyde</td>
<td>Aqueous::Liquid</td>
<td></td>
<td>1</td>
<td>50</td>
<td>ML</td>
<td>SIGMA-A</td>
<td>1.00-0</td>
<td>SIGMA-</td>
<td>idk-123</td>
</tr>
<tr>
<td>n2vesal</td>
<td>Veal</td>
<td>Laurie</td>
<td>N2</td>
<td>N2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ARSENIC TROXIDE</td>
<td></td>
<td></td>
<td>1</td>
<td>5</td>
<td>ML</td>
<td>1327-53:</td>
<td>BOEHEMA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>n2vesal</td>
<td>Veal</td>
<td>Laurie</td>
<td>N2</td>
<td>N2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Test Chemical (5-23)</td>
<td>Solid</td>
<td></td>
<td>1</td>
<td>25</td>
<td>KG</td>
<td>SIGM</td>
<td>idk-123</td>
<td></td>
<td></td>
</tr>
<tr>
<td>n2vesal</td>
<td>Veal</td>
<td>Laurie</td>
<td>N2</td>
<td>N2</td>
<td>Fume Hood</td>
<td>Fume Hood</td>
<td></td>
<td></td>
<td>DIMETHYL ETHER</td>
<td>Solid</td>
<td></td>
<td>1</td>
<td>4</td>
<td>CASES</td>
<td>1115-10-6</td>
<td>SIGMAA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>n2vesal</td>
<td>Veal</td>
<td>Laurie</td>
<td>N2</td>
<td>N2</td>
<td>Flammables</td>
<td>Cabi Flammables</td>
<td></td>
<td></td>
<td>DIMETHYL ETHER</td>
<td>Solid</td>
<td></td>
<td>1</td>
<td>100</td>
<td>ML (G)</td>
<td>11510-6</td>
<td>SIGMAA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>n2vesal</td>
<td>Veal</td>
<td>Laurie</td>
<td>N2</td>
<td>N2</td>
<td>Acid Cabinet</td>
<td>Acid Cabinet</td>
<td></td>
<td></td>
<td>Copper phthalocyanine</td>
<td>3,4,4, Lique</td>
<td></td>
<td>1</td>
<td>25</td>
<td>ML</td>
<td>76-03-9</td>
<td>SIGMA-A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Leave the second row alone. These are identifiers that the system needs to accurately place the data in the correct fields.