CMIS

Basic User Guide

July 2008

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INTRODUCTION

The CMIS Application is a material inventory database. Information such as chemical inventory, MSDS, flammable levels by location is available from this system.

PURPOSE OF CMIS

The CMIS application is designed to provide a common material inventory database that is both searchable and trackable. It provides real-time material and inventory information as well as critical MSDS information on demand.

The purpose of the application is to provide a common inventory system that allows EH&S to track chemical inventory.

MODULE / LINK DESCRIPTION

INVENTORY

The inventory module allows you to view chemical inventory based on user defined filters. These filters can be combined to allow for powerful and specific searches.

LOOKUPS

Vendors – Provides all supporting vendor data

Buildings – Provides all building supporting data

Floors – Provides all supporting floor data

Rooms – Provides all room supporting data

Materials – Can view supporting chemical data, such as, MSDS information, SOP information and chemical properties

Part Number – In this table you can view part number data

CAS – Ability to view CAS numbers and supporting CAS data

Conversion – Can view scientific notation for chemical volume calculations

Storage Codes – View storage codes associated with all materials

Waste Codes – View waste codes associated with all materials

Groups – Shows all designated groups. Please note that you will need special access to view the users associated with each group

User - Shows all users of the CMIS application in your facility

MY ACCOUNT

This Module allows you to accomplish two functions:

1) Change your password
2) Update your contact and account information

TYPICAL USERS OF CMIS

CMIS operates on a 3 level access system. The roles and accesses are defined as follows:

- ROLE <u>READ ONLY</u> – This access is base level access. It allows you to view material data, material inventory as well as other useful information such as vendor contacts and locations
- ROLE <u>LAB TECH</u> – This access level is for Lab Technician's and Principal Investigators. With this access you can complete all of the functions of the ROLE READ ONLY. In addition, you also have the capability to modify your own inventory. The inventory items will be categorized based on the physical location of the material.
- ROLE <u>EHS ADMIN</u> – This access level provides a mechanism in which EH&S Personnel can administer CMIS. With this access, users can add locations, materials, part numbers as well as inventory data.

GETTING ACCESS TO CMIS

To get access to CMIS, all you need to do is contact the administrator of the software for your company or university. The administrative information is available from the login page.
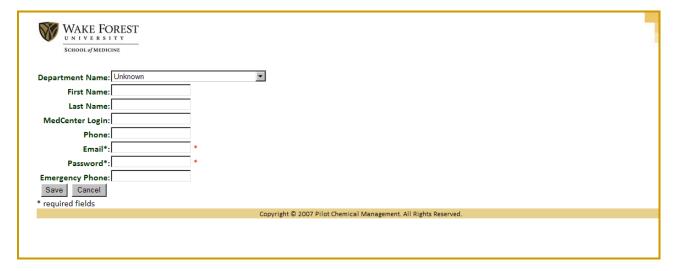
INFORMATION LOCATED IN CMIS

CMIS contains a plethora of information. While not all of the information that CMIS provides will be detailed here, below is a listing of the major data groups:

- Inventory Data – You can access inventory data for any location in the university
- Material Data – You can access all material data for a chemical. This includes, MSDS, SOP and shipping information
- Part Number Data – You can access all of the part numbers that are at your facility

COMMON FUNCTIONS OF CMIS

CREATING AN ACCOUNT

To create an account, navigate to the login page of CMIS. Click the link called "Sign Up for New Account."

This link will take you to the create account page. Enter all of the information that you know.

Once you create an account, an email will be sent to EH&S informing them that you created an account.

Your default role once you create your account will be read only. If you need a higher level of access, contact EH&S and they will upgrade your account.
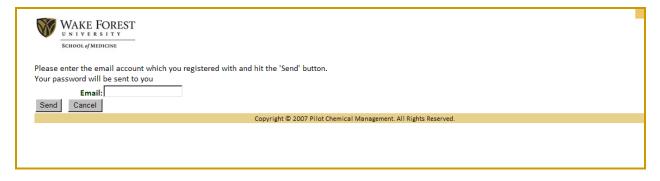
LOST PASSWORD

The lost password feature of CMIS allows you to recover your password should you forget it.

The only required information that you need in order to recover your password is your email address.

If you forgot the email address that you registered with, then contact EH&S by phone and they should be able to help you recover it.
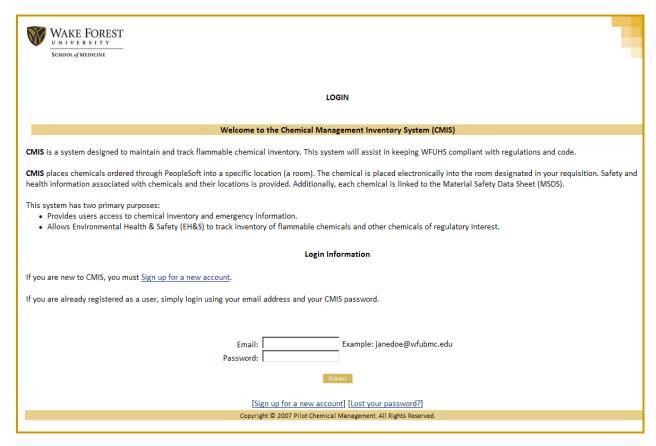
To access the Lost Password feature, navigate to the login page and click the "Lost Password" link. This will bring up the following page:

On this page, just enter your email address and your password will be emailed to that address only.

LOGGING IN

To login to CMIS just enter your assigned user name and password provided by EH&S. If you do not have an assigned user name and password, you can create an account and get "read only" access to the system.
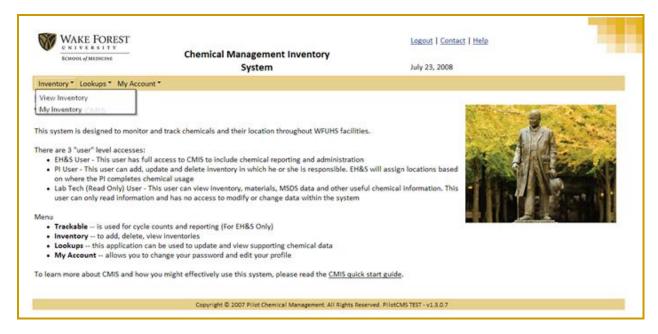

If you need higher level access, contact EH&S.
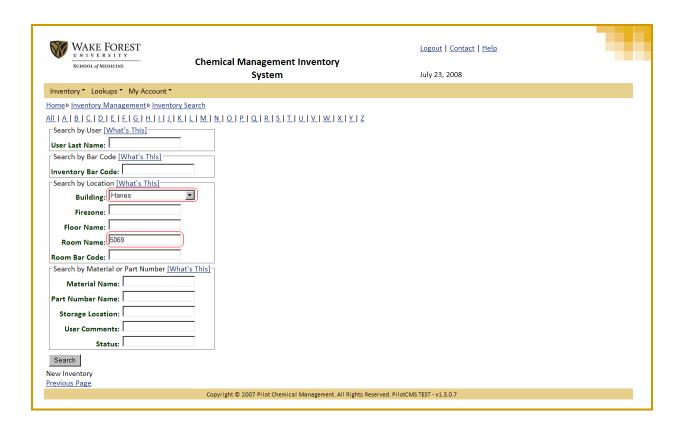
SEARCHING FOR INVENTORY

You have many options when you want to search for chemical inventory. CMIS allows you to search for chemical inventory based on several filters that you can combine.

To search for inventory login into CMIS and go to "View Inventory"
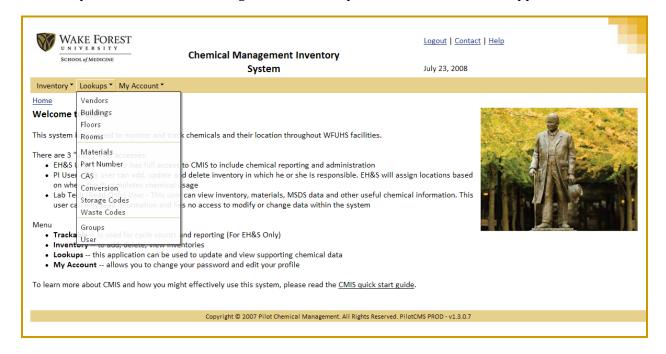

From View Inventory, you can search for chemical inventory based on several filters. Please note that you can combine these filters to make your searches very specific.

For example, if you wanted to know what inventory is located in Hanes 5069, you would set up the form like the following:

LOOKING UP MSDS INFORMATION

To look up MSDS information, navigate to the Lookups, Material section of the application:

From this page you can search for your material based on what you are looking for.

For example, if you were looking for Acetone, you would enter "Acetone" under product name and click search:

From this page, you can select which product you would like to view - the MSDS form or you can view the product detail.

Once you view the material detail, a link for the MSDS will be provided so long as EH&S has an MSDS on file.

FREQUENTLY ASKED QUESTIONS

1. What are 'Groups'?
   - EH&S uses 'Groups' for creating different profiles in CMIS, which are made-up of users and locations. A group is created using the main contact's MEDCTR ID followed by the profile classification (lab, clinic, etc.). Then other users can be added to the group, along with the locations for which this group is responsible.
   - Users with 'LAB_TECH' permissions can modify the inventory in the locations which belong to their assigned group (see question 3 for how to retrieve these items).
2. What is 'trackable' inventory?
   - Trackable inventory are items of concern that have been designated by EH&S at the part number level. Once a part number is marked as 'trackable' only a user with an 'EHS' role can add/edit/delete the item from inventory.
   - 'Trackables' are assigned barcodes by EH&S which aides in tracking these items.
   - Currently the main item that EH&S tracks are flammables, but CMIS has the ability to let EH&S track any item(s) they deem are necessary.
3. What is 'My Inventory'?
   - 'My Inventory' returns a list of items which are in rooms that are connected to your assigned 'Group' (see question 1). Users with a 'LAB_TECH' role can modify this list of items.
4. How can I move inventory from one location to another?
   - First use the 'My Inventory' option (see question 3) to return a list of items which belong to your group. If you have a 'LAB_TECH' role then you can click on the 'Edit' option on the table and select the new location and click 'Save'. Remember you can only move items that are not trackable (see question 2).
   - If you have a large amount of items to move then contact Chemical Safety and they can do a bulk move for you.