

Chemical Inventory Site Guide

July 28, 2021

Purpose

The Chemical Inventory SharePoint site is an interim solution for maintaining hazardous chemical inventories until a new system is put into place. This document provides procedures for accessing, editing, adding new inventories, transferring, closing, and sharing chemical inventories.

Scope and Applicability

The scope of the content includes inventories for UTK/UTIA/GSM.

Abbreviations

GSM – Graduate School of Medicine

PI – Principal Investigator

UTIA - University of Tennessee Institute of Agriculture

UTK - University of Tennessee, Knoxville

Definitions

SharePoint: A web-based collaborative platform that integrates with Microsoft Office. Launched in 2001, SharePoint is primarily sold as a document management and storage system, but the product is highly configurable, and usage varies substantially among organizations.* (Owned by EHS Admin Group; Admin group individuals are assigned as owners).

Roles and Responsibilities

EHS Administrators are responsible for:

- Maintain system and manage permissions.
- Ensure data integrity for export into a future CMS.
- Recovery of data and version history maintenance.

Principal Investigators are responsible for:

- Maintaining individual chemical inventories.
- Consulting EHS Administrators (Jessica Woofter, jwoofter@utk.edu or James Cantu, jcantu@utk.edu) about personnel access requests.

Procedures

Accessing the Chemical Inventory Site

Inventory Owners and their designees access the SharePoint site through the EHS website.

1. Go to <https://ehs.utk.edu>
2. Select Chemical Inventory from the website menu
3. Click on the Log in button
4. Log in with your UT NetID and password
5. Select the appropriate College folder
6. Select the appropriate Department folder
7. Select the appropriate Lab folder
8. Open the chemical inventory Excel file (.xlsx)

Editing Chemical Inventory Files

SharePoint will open the chemical inventory file within the Office 365 online Excel environment. Any changes and edits must be completed within this file. Inventory Owners will not be able to delete the assigned file. If an inventory is maintained outside of this file, data can be copied and pasted into the existing file.

Mandatory fields include the Group Name, Chemical Name, Building, Room, Amount, and Units.

Preferred fields include the CAS Number, Physical State, Quantity, Controlled Substance, and Manufacturer.

Optional fields include the Bench, Shelf, Specific Location Note, Product Name, Product/Catalog Number, Date Received, Expiration Date, and Purchase Order.

New Inventories, Transfers, and Closures

If a new inventory needs to be established, contact EHS (Jessica Woofter, jwoofter@utk.edu) and include the names of owners and designees, department or unit, and lab name (PI name).

To transfer existing inventories, contact EHS (Laboratory Safety Services, ehs_labsafety@utk.edu) and include the name the owner or recipient designated to maintain the inventory.

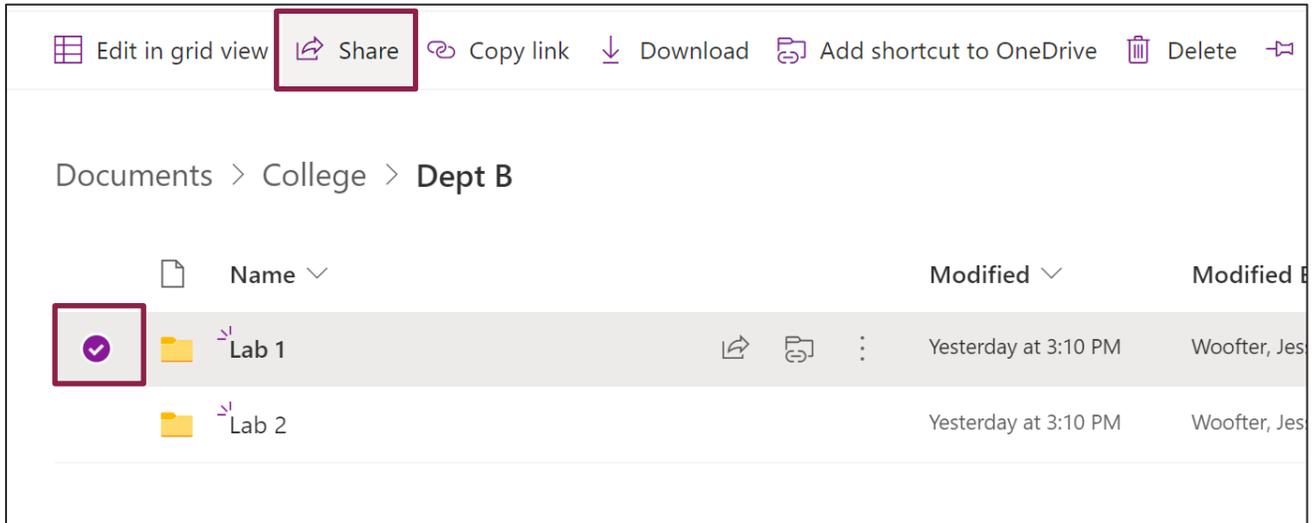
For closures, contact EHS (Laboratory Safety Services, ehs_labsafety@utk.edu). Please remember that an inventory must have an owner. Even if the original owner leaves the University, a new owner must be assigned. In the absence of an assignment, the folder ownership will be assigned to the Department Head.

Sharing Instructions for Inventory Owner

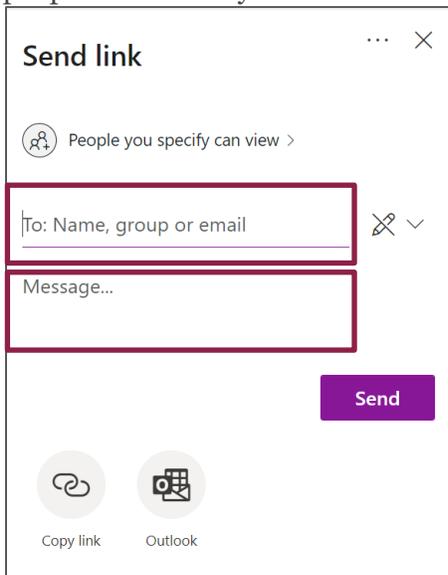
Even though EHS has established permission for Inventory Owners (e.g., Principal Investigator) and their compliance designees, an owner may wish to share Edit access to a lab or team member. Inventory Owners can use the following instructions to share the folder. The recipient will receive a link by email, but they will not be able to access the folder through the EHS website. To make the access permanent for those individuals, a request may be sent to EHS (Jessica Woofter, jwoofter@utk.edu).

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5. Select the appropriate College folder
6. Select the appropriate Department folder

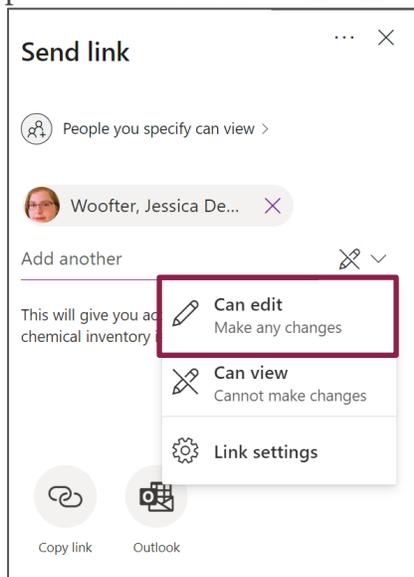
7. Without opening the lab/unit folder, hover over the folder and select the **Share** icon . Alternatively, select the lab/unit folder and then click the **Share** option for the top menu.



8. A window will appear to allow the PI to add specific individuals and provide a brief message indicating what is being shared with those assigned individuals. “**Specific people**” gives access only to the people you specify, although others may already have access. If people forward the sharing invitation, only people who already have access to the item can use the link.



9. Before sending the link to the assigned individuals, select the **Edit** icon  and change the permission level to “**Can edit**” to allow the assigned individuals to edit folder content.



10. Next, click the **Send** button. This action will send the recipient(s) a link to access the lab/unit folder. They will not be able to access the site through the global link listed on the EHS website. They must use the email they received to gain access to the folder.

