DATA SHEET SOLUTIONS

SDS Management System

Data Sheet Solutions Administrative Guide

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INTRODUCTION

This guide intends to provide details about the administrative functions available within your Data Sheet Solutions Administrative Dashboard. Depending on when this guide was printed, we may have increased functionality or modified behaviors slightly.

Plan Specific Notes

We do offer two flavors of the Data Sheet Solutions SDS Management System. Features specific to the plan will be identified as shown below.

AP This "AP" indicates enhanced features available to customers with the **Autopilot** plan.

If you ever have a question, be sure to get in contact with us at info@datasheetsolutions.com or on our website https://www.datasheetsolutions.com.

CHEMICAL INVENTORY LIFECYCLE

Your chemical inventory will progress through a series of stages we call the chemical inventory lifecycle. Each stage of the lifecycle is represented by a different table within the administrative dashboard which can be navigated between using the stage selection bar at the top of the dashboard.

The number beside each label indicates the number of records within each stage.

PENDING YOUR REVIEW

The "pending chemicals" stage will include chemicals that have been entered into the system, but not yet assigned to an SDS or sent to the Data Sheet Solutions Fulfillment team. This will include records created when an employee uses the "Request Missing SDS" button, as well as new chemicals found by administrators using the Inventory Tool.

Records will remain in this status until an authorized Administrator or Location POC moves the record.

The following actions are conditionally available for requests within this stage:

Search the Community Library (Check our crowdsourced SDS database for the document)

Search SDS (Open multiple Google searches to locate SDS)

Quick Search Existing Records (Search for a duplicate request and merge as necessary)

Request SDS (Send to the Data Sheet Solutions Fulfillment Team) AP

Edit Request (Update the chemical information or process the uploaded PDF)

Action Drop-Down (Provides Access to all above actions and **Archive Request** and **Delete Record)**

IN PROCESS AP

Chemical requests in the "In Process" lifecycle stage have been sent to the Data Sheet Solutions fulfillment team. Chemicals will remain in this stage until the fulfillment team either obtains and processes your request into the active library, or rejects the request back into the "Pending Chemicals" list.

About the Fulfillment Process

Our fulfillment team takes a methodical approach to the research and location of chemical safety data sheets which can be broken into several phases.

1. Manufacturer / Supplier Identification
2. Manufacturer / Supplier Electronic Library Search (if available)
3. Manufacturer / Supplier Direct Request (Electronic)
4. Request 1 Waiting Period
5. Manufacturer / Supplier Direct Request (Voice)
6. Request Resolution

The length of time your requests will remain in the "In Process" lifecycle stage will depend on how many phases of the fulfillment process are required to complete the fulfillment.

The In Process Lifecycle button has the potential to display 2 counters. The conditionally displayed Red counter indicates the number of In Process requests which require your attention.

If our fulfillment team has a question about your request, or want to alert you about a problem with your request, it will be flagged here. By default, requests requiring your attention, will be shown at the top of the sort order of the In Process request list.

Respond to Fulfillment (Click to view a message from the fulfillment team about this request)

ACTIVE LIBRARY

Chemicals in your "Active Library" are available for employees to browse and search in the employee portal. The fulfillment team will also periodically review your active chemicals to ensure they are still current, and update if available. AP

For Autopilot customers, the Active Library Lifecycle button has the potential to display 2 counters. The conditionally displayed Grey counter indicates the number of "Self Managed" documents. These are the documents you upload yourself and do not want our team performing verification or updates on.

The following actions are available for chemicals in your active library:

Self-Managed Chemical Indicator (Click to add a Self-Managed table filter)

View Document (Open the PDF in the internal viewer)

Add Label (Open the Secondary Container Label Maker and Insert a Label)

Edit Request (Update the various aspects of the record)

Action Drop-Down (Provides Access to all above actions as well as **Send Back To Pending**, **Archive Request** and **Delete Record**)

ARCHIVED DOCUMENTS

OSHA has identified safety data sheets as an acceptable exposure record (OSHA standard 29 CFR 1910.1020), which means you can meet your record retention requirements by saving all SDSs for the required 30 years. The “Archive” stage of our chemical lifecycle allows you to pull a safety data sheet from the workplace inventory and maintain a copy as long as needed.

Chemicals can be archived on a per-location basis. Once a chemical has been archived at all assigned locations, it will no longer be available for viewing in the employee portal, and will no longer count against your total document cap.

The following actions are available for chemicals in your Archived Documents:

- Restore Record (Allows you to “unarchive” the record at 1 or more locations)
- Edit Request (Update the various aspects of the record)
- Action Drop-Down (Provides Access to all above actions as well as **Delete Record**)

LAYOUT

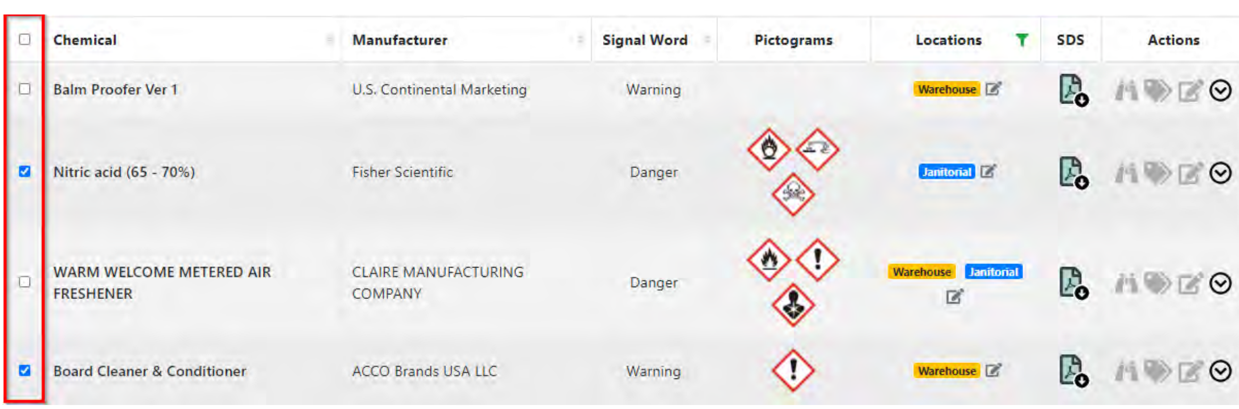
The display of your chemical information is standard across all stages of the chemical lifecycle. Information is displayed in a table with specific data or actions shown in each column.

All tables will have a predefined selection of basic columns for display. You can customize each lifecycle table as you see fit by toggling the columns with the column drop-down button in the upper right-hand corner.

SELECTION CHECKBOX

The first column of each table includes the selection checkbox, which allows you to choose one or more chemicals in preparation for performing a bulk “With Selected” action which includes location editing, binder creation, zip file creation, chemical emailing, archiving, moving, and deleting records.

The topmost checkbox which appears in the table header allows you to select or deselect all chemicals in the list at one time.



IMAGES

The images column will allow you to see a small version of any images attached to the record.

Clicking an image thumbnail will open the image window, allowing you to see a larger view, as well as access to next and previous buttons if more than 1 image is attached.

To add, remove, or edit a record's image, open the record editor and toggle on **Expert** mode. The "Photos" editor can be found near the bottom of the **General** tab.

1. Upload a new image using the “Choose Files” file selector
2. Delete an image using the Remove button
3. Make an image primary by dragging to the front of the list. The Primary image is shown in the employee portal.

PRODUCT IDENTIFIER

The column titled “Product Identifier” includes the official product identifier for each entry. The product identifier is one of three columns included in a basic keyword search.

To edit the Product Identifier, open the record editor and toggle on **Expert** mode. It can be found at the top of the **General** tab.

AKA

The column title “AKA” (Also Known As) includes any additional keywords, product codes, or phrases attached to the record. AKA is one of three columns included in a basic keyword search.

To add, remove, or edit any of the AKA items, open the record editor and toggle on **Expert** mode. It can be found at the top of the **General** tab.

MANUFACTURER

The Manufacturer column provides the manufacturer or supplier name and is one of three columns included in a basic keyword search.

To edit the Manufacturer Name, open the record editor and toggle on **Expert** mode. It can be found on the **General** tab.

SIGNAL WORD

The signal word column provides one of the three potential values for the SDS signal word. Hazardous chemicals will include either "Warning" or "Danger", while non-hazardous, ***and non-GHS-compliant* documents will be blank.***

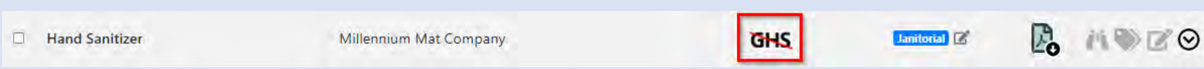
To edit the signal word, open the record editor and toggle on **Expert** mode. It can be found at the top of the **Hazard** tab.

PICTOGRAMS

The Pictograms column will include any of the nine official GHS pictograms the manufacturer has assigned to the material. If the document doesn't comply with the modern GHS standard, the GHS strikethrough symbol will appear indicating a non-GHS document.

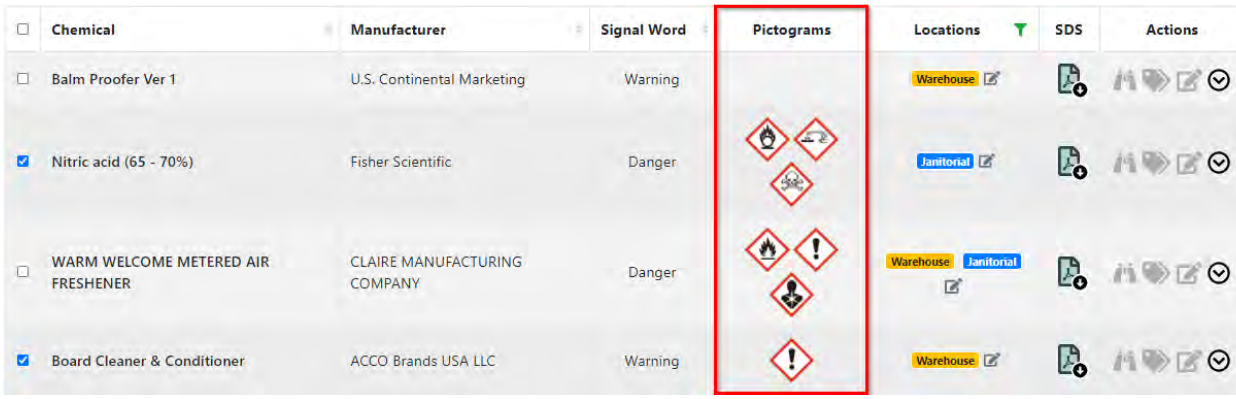
NON-GHS Compliant Documents (MSDS)*

Documents marked with the "~~GHS~~" icon have been flagged as non-GHS compliant, which means the manufacturer-provided document doesn't meet the modern requirements for a safety data sheet. Specific dangers of these products are not displayed within the DSS system or DSS secondary chemical labels, and employees must be trained to verify the chemical safety information using the MSDS itself.



Non-compliant documents will not include a **Signal Word, Pictograms, Hazard Statements, or Precautionary Statements.**

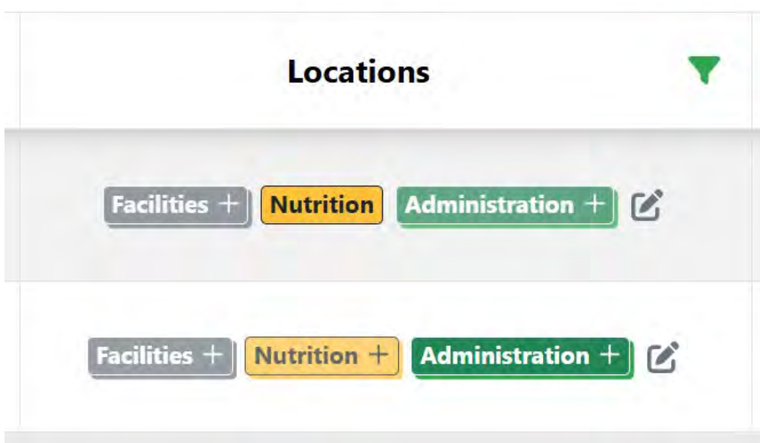
Pictograms shown in this column can be clicked and assigned as a filter for the chemicals in your library.



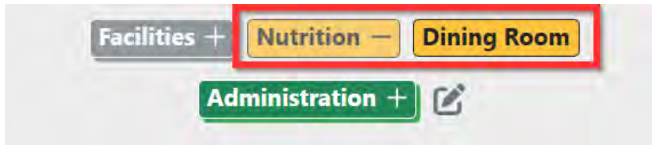
To edit the pictograms, open the record editor and toggle on **Expert** mode. It can be found in the **Hazard** tab.

LOCATIONS

The locations column will show any category/location tags assigned to the chemical. Like pictograms, clicking a location tag will apply a filter to your list, showing only chemicals that are tagged as selected.



If multiple locations in a hierarchy have been assigned, tags will be nested, by default showing on the parent location with a **+** icon to indicate that the chemical is also assigned to sub-locations. Clicking the + will reveal sublocations that the chemical has also been assigned.

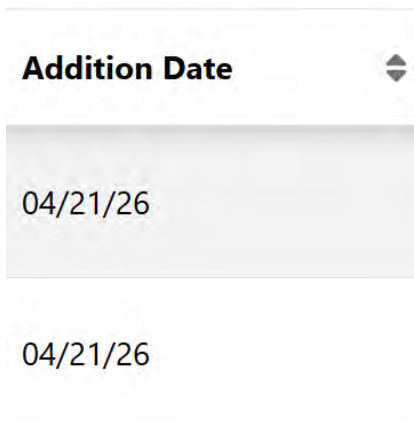


The location column includes a special filter icon which when clicked will open the location selector dialog. This allows you to apply location filters for tags that may not be visible on any of the chemicals currently shown in your table.

Each chemical also includes an edit icon. Click the icon to open the location selector dialog and manually assign location tags to the chemical.

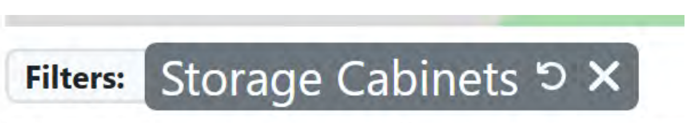
ADDITION DATE

The Addition Date is the date the record was first created. The addition date cannot be edited.



LAST INVENTORIED

The Last Inventoried Date is the last date the record was marked as inventoried with the Inventory Tool. When no location filter is active, the date will refer to the most recent inventory at any location.



When a Location filter has been applied, the date will reference the most recent date it was inventoried at the location specified in the filter.

To add new inventory records, open the record editor and toggle on **Expert** mode. The **Inventory** tab allows you to view existing and add new inventory records. The Inventory Tool is the primary method of creating and updating inventory records.

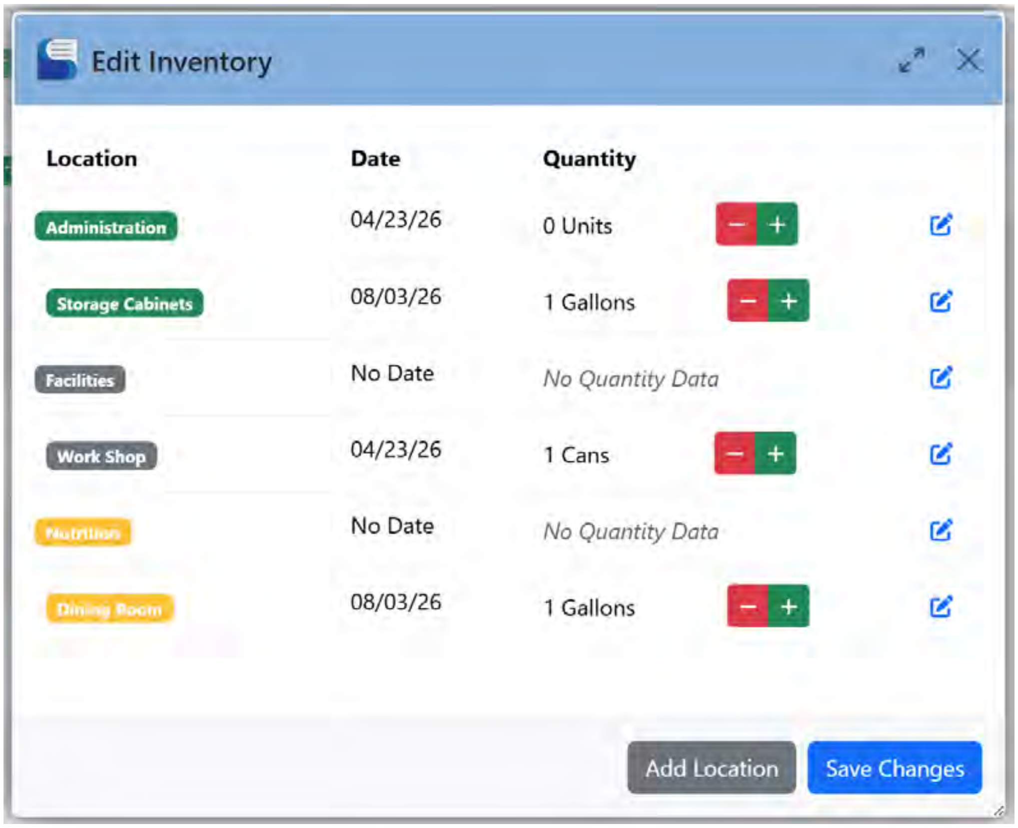
Location	Status	Added	Archived	Last inventory	Quantity	Actions
Nutrition	active	4/23/2026	—	4/23/2026	None on hand	Edit
Storage Cabinets	active	4/23/2026	—	4/23/2026	None on hand	Edit
Work Shop	active	4/23/2026	—	4/23/2026	1 Cans	Edit

INVENTORY

The Inventory column allows you to see the combined total quantities of a product as recorded in their inventory records. In the column, like units will be combined to show a total across all inventoried locations.

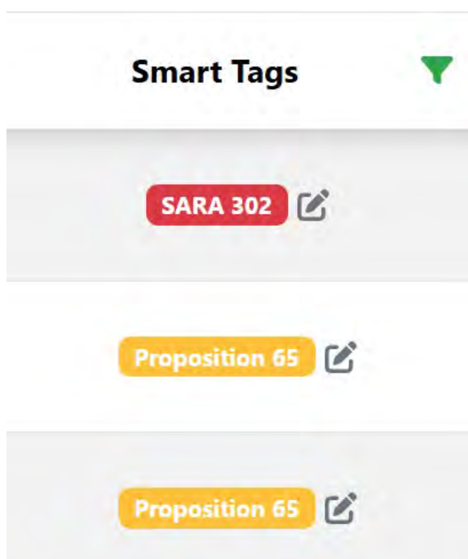
Inventory
1 Cans
1 Cans, 2 Gallons

You can view and edit the inventory records by clicking the trailing edit icon, which will open the "Edit Inventory" window. This window will allow you to see, edit, and add the individual quantity records.

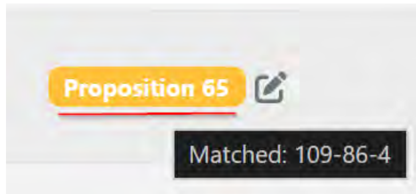


SMART TAGS

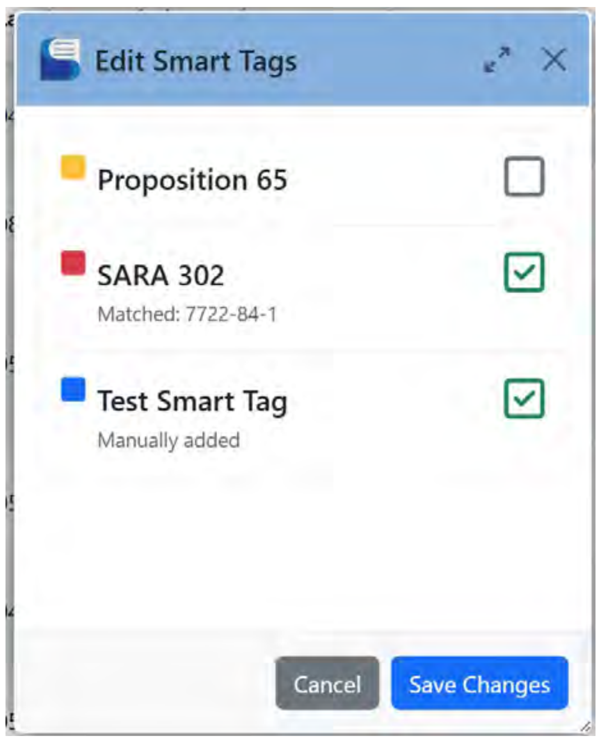
The Smart Tags column reveals what (if any) enabled smart tags have been applied to the record.



Smart Tags are typically automatically applied to a record, when matching keywords are identified in the document text. To see which of the smart tag keywords were located in the document text, hover over the smart tag with your mouse.



You can also see this same information, as well as manually add or remove a smart tag from a record by clicking the smart tag's trailing edit icon. This will open the Edit Smart Tags window, allowing you to view and edit the smart tag assignments.



Smart Tags are also table filterable. Click a smart tag badge to filter your record tables using that smart tag. You can also click the column header filter icon to manually choose a tag to use as a filter.

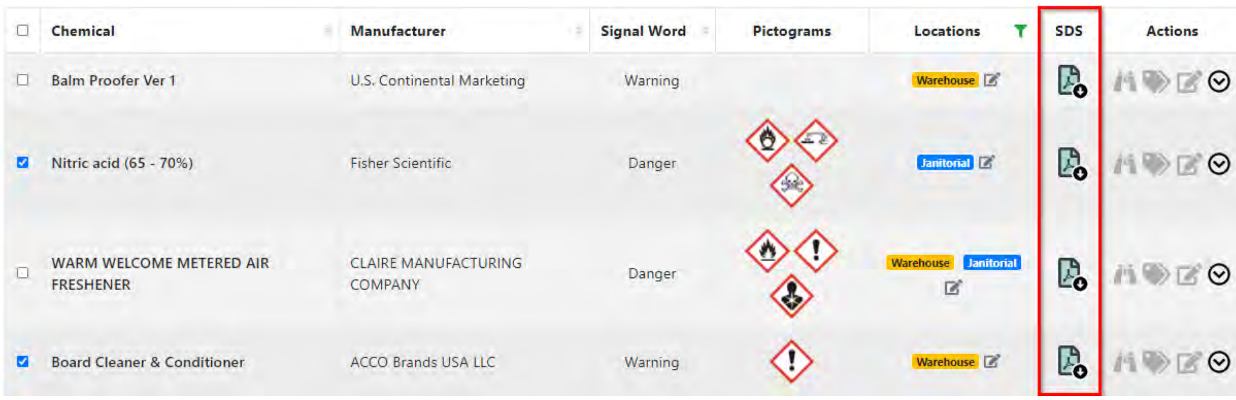
SDS DATE

The SDS Date column shows the revision date of the currently active safety data sheet.

To edit the SDS date for a record, open the record editor and toggle on **Expert** mode. The "Revision Date" can be found on the **General** tab.

SDS DOWNLOAD / UPLOAD

The SDS column displays one of the following icons, and when clicked will initiate their corresponding action.

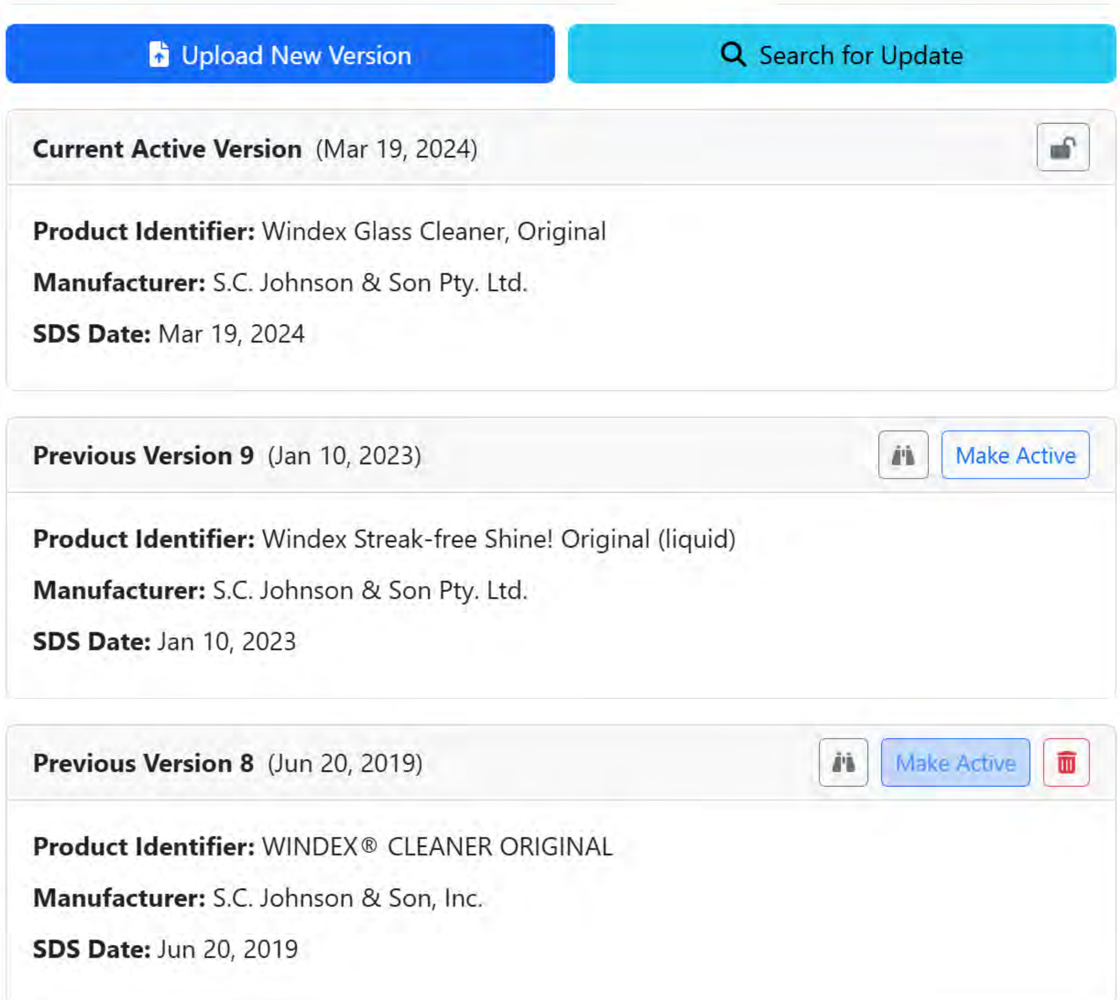


Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

SDS Upload
Found in the pending and in-process stages, this icon indicates that a PDF document has not yet been assigned to the chemical. Clicking the icon will open a file-picker and allow you to upload an existing file from your computer.

SDS Download (Single)
This icon indicates that a single version of the safety data sheet is available for download. Click the icon to save the file to your device.

SDS Download (Multiple)
This icon indicates there are several versions of the SDS available for download. Click the icon to save the currently active version. To view the versions available or to change the active version open the record editor and toggle on **Expert** mode. It can be found on the **Versions** tab.



The **Versions** tab allows you to upload a new superseding PDF file, Search the Community Library for potential updated versions, and view and edit the current version history connected to the record.

The color of the SDS Download button signifies whether the document is under the current management of the SDS fulfillment team (Green) or whether you are managing this document yourself (Blue).

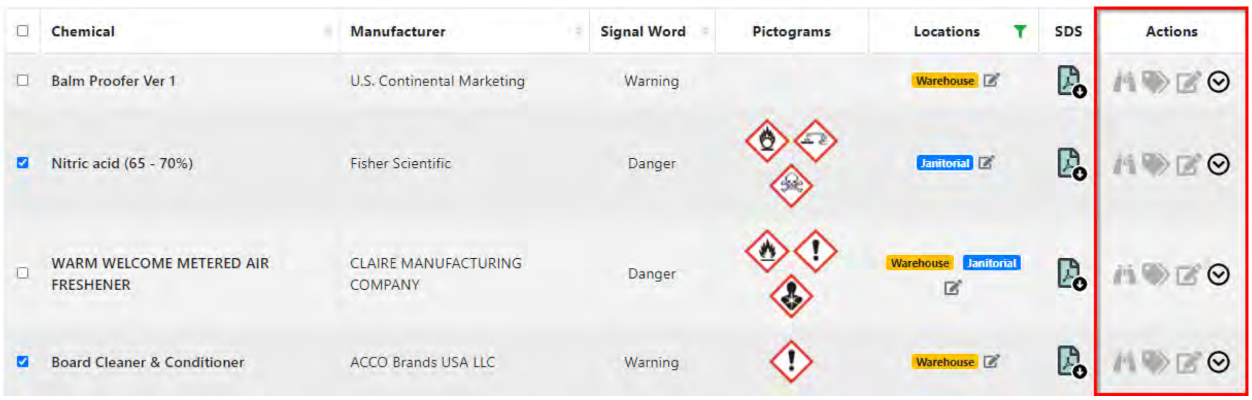
If you have **translated** the document, PDF versions of those translations will be available in this column as well. Translations will be black with the two-letter ISO language code.

Available languages and their associated ISO codes can be found at the following website:

https://docs.cloud.google.com/translate/docs/languages

ACTIONS

The last column provides you a series of actions that allow you to work with each chemical or request in your list.

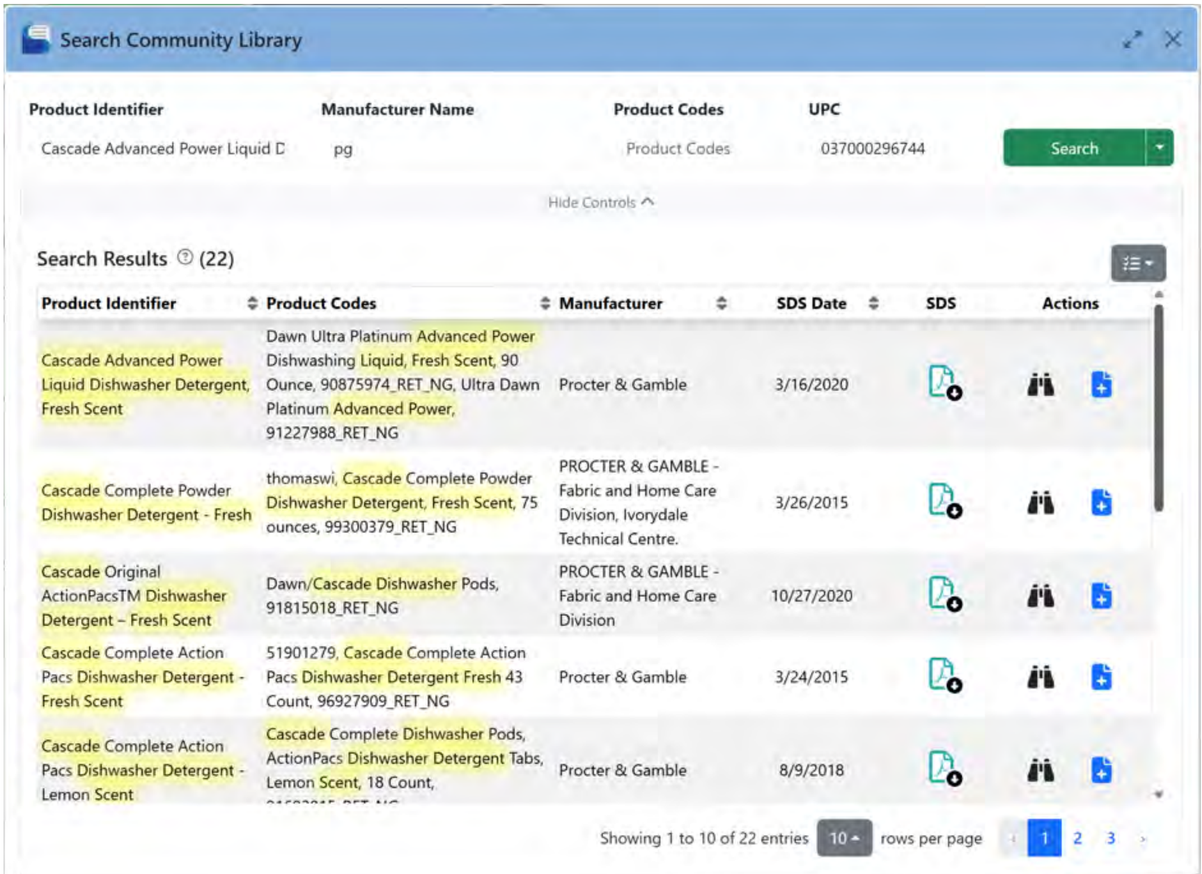


Chemical	Manufacturer	Signal Word	Pictograms	Locations	SDS	Actions
Balm Proofer Ver 1	U.S. Continental Marketing	Warning		Warehouse		
Nitric acid (65 - 70%)	Fisher Scientific	Danger		Janitorial		
WARM WELCOME METERED AIR FRESHENER	CLAIRE MANUFACTURING COMPANY	Danger		Warehouse Janitorial		
Board Cleaner & Conditioner	ACCO Brands USA LLC	Warning		Warehouse		

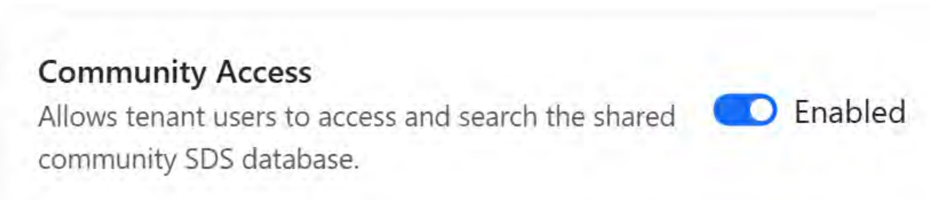
The available actions will differ based upon the status of the record and your subscription type. The following list shows all available actions.

SEARCH THE COMMUNITY LIBRARY

This action is available in the “Pending Your Review”, and opens the “Search Community Library” window.



The Community Library is a crowd-sourced database of documents uploaded by any SDS Toolbox or SDS Autopilot customer who has the **"Community Access"** feature flag enabled.



The search will automatically use the information from the request and return any results. Exact text matches will be highlighted in the results for easier comparison. The **Actions** column in the Search Results introduces two new actions:

- **Link to Your Record** – This action will assign the search result to your request

- **Merge With Existing** – When this action is shown instead of the **Link to Your Record** action, this means the search result is **already** in your library and is a duplicate. Clicking this button will merge the record with the existing record, retaining location assignments, inventory records and custom properties from both records.

The community database is a crowd-sourced SDS database built from customer uploaded documents. The Data Sheet Solutions team does not verify, maintain, or update any records contained within the community library.

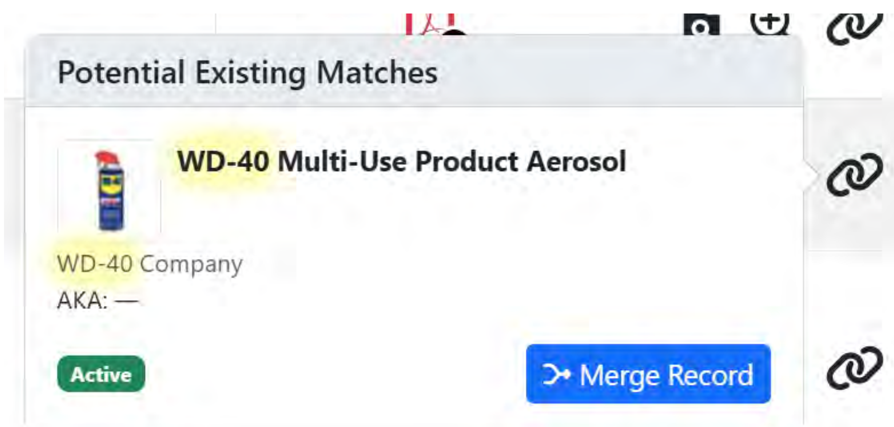
SEARCH SDS

This action is available in the "Pending Your Review", and attempts to open **numerous** new tabs, each using a distinct Google Search strategy to help you manually research and locate a Safety Data Sheet.

Alert: The ability for the application to open more than one new tab for search is reliant upon your web browser's pop-up blocker. The first time you use this function, you may have to enable pop-ups for your SDS Portal.

QUICK SEARCH EXISTING RECORDS

This action is available in the "Pending Your Review" and is a quick way to check if the record is a potential **duplicate**. Clicking the action opens the "Potential Existing Matches" pop-up and will potentially show other records in your account.



Any results will have the appropriate matching keywords highlighted. The bottom left will show a badge indicating the status of the record. The Merge Record button will combine the request with the duplicate (retaining the status of the existing match) allowing you to remove the duplicate request.

REQUEST SDS ✈AP

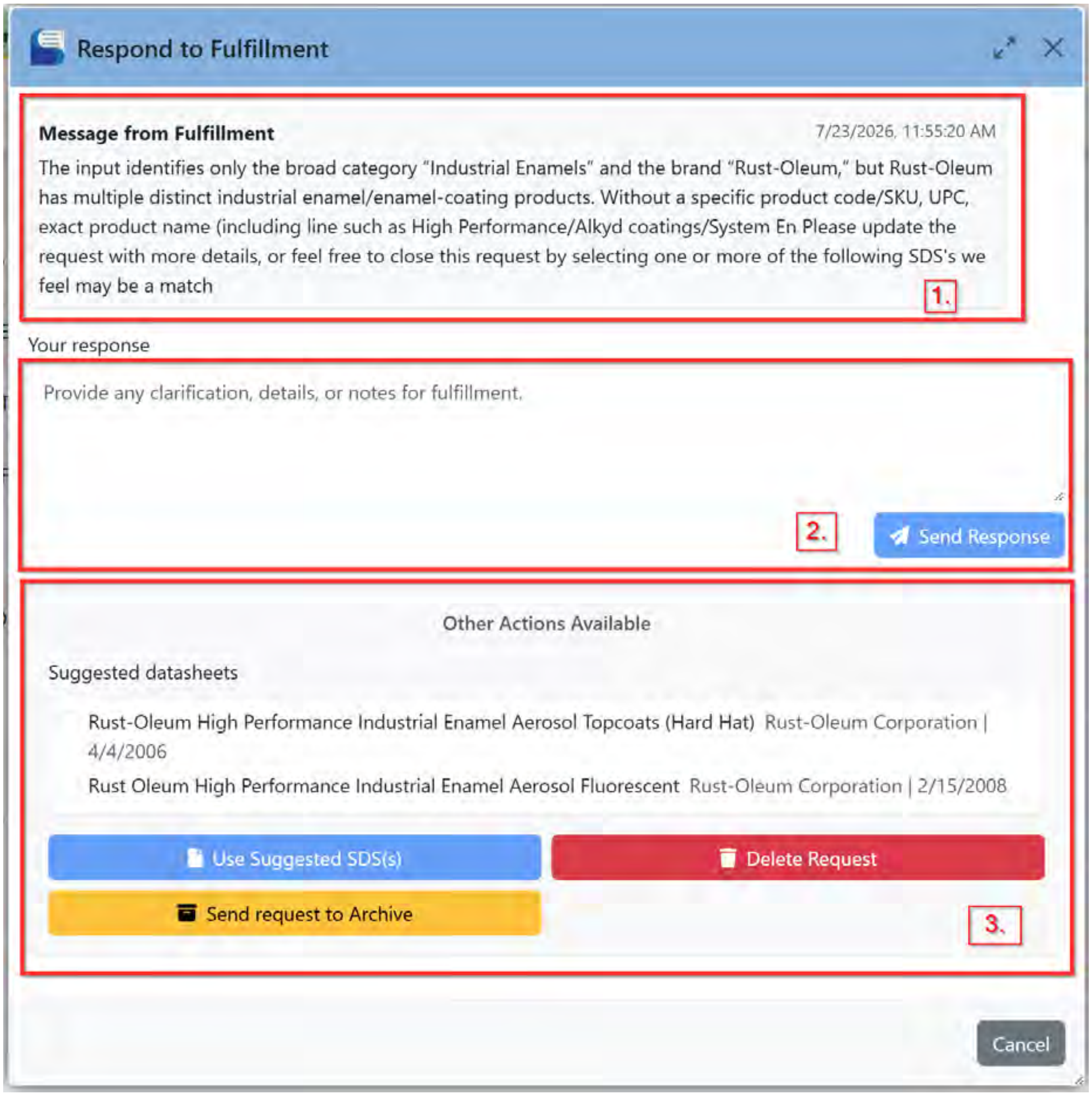
This action is available in the “Pending Your Review” table for Autopilot subscribers. This action sends the record to the Data Sheet Solutions fulfillment team for review and fulfillment.

EDIT RECORD

This action is universally available and opens the record editor in either **Wizard** or **Expert** mode.

RESPOND TO FULFILLMENT

This action is available in the “In Process” tab. Clicking it will open the “Respond to Fulfillment” window, which will allow you to read the message from our fulfillment team and respond as necessary.



1. **Message Thread** – The messages received and sent will be shown at the top of this window.
2. **Response Box** – Send a message back to the fulfillment team here.
3. **Other Actions** – The Other Actions Available box may provide any of the following:
    a. **Suggested Datasheets** – The fulfillment agent may provide you with alternative SDS selections here. If you determine that one or more of them are acceptable, tick the checkbox.
    b. **Use Suggested SDS(s)** Button – Available after checking a suggested datasheet. This closes your request assigning the documents you checked to your active library.
    c. **Delete Request** Button – Remove this request entirely

d. **Send Request to Archive – Send the request to the archive with no SDS attached. The messages sent from the fulfillment team will be attached as notes.**
e. **Send to Active Without SDS –** Places the request into the active library without a safety data sheet. Marks the record as 'self-managed' so it doesn't count against your SDS cap.

VIEW DOCUMENT

Clicking this action opens the PDF in the internal viewer.

ADD LABEL

This action is available for records in the **Active Library.** Clicking the action will open (if currently closed) the secondary container label maker and render a secondary container label at the next available location.

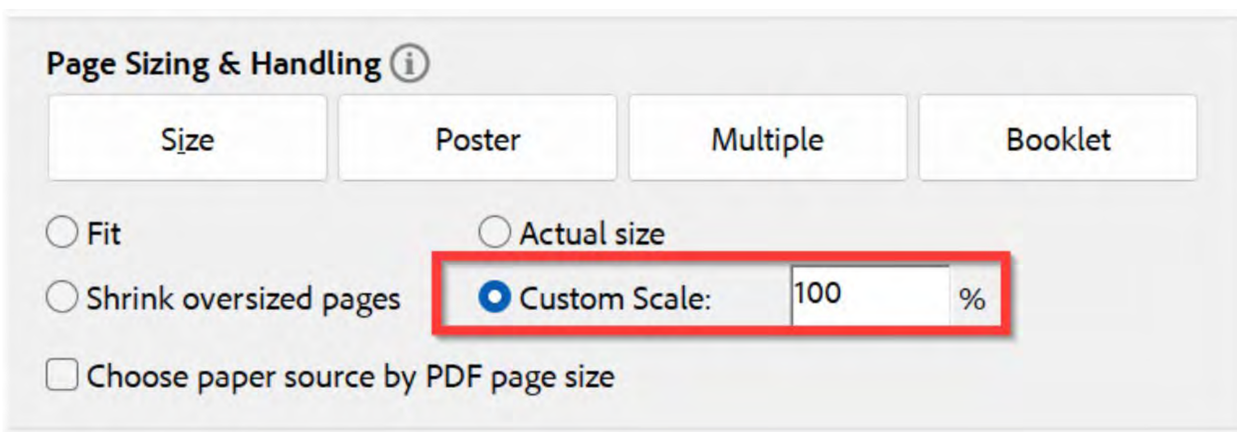
The secondary container label allows administrators and employees to create and print labels suitable for use on secondary containers. The label maker provides access to the following controls:

1. **Template Selector**: The template selector allows you to choose the desired layout template.

    a. **Auto Layout** is the default, allowing for space to render all required elements of a GHS secondary container label
    b. **QR Priority** is a layout which emphasizes the size of the QR code rendered on the label
2. **Label Selector:** The label selector allows you to choose the desired label type, which includes a wide variety of Avery sheet labels, as well as individual label-maker labels.
3. **Display Options:** This drop-down allows the user to toggle which elements should be rendered on the label.
4. **Download Labels:** This button allows you to download the rendered labels for printing.

Alert: The downloaded PDF can be printed using standard office printers or dedicated label printers when the correct template is selected in Label Maker.

For proper label alignment, do not print using automatic sizing or the **Fit** option. Set the print dialog to **Custom Scale: 100%**.

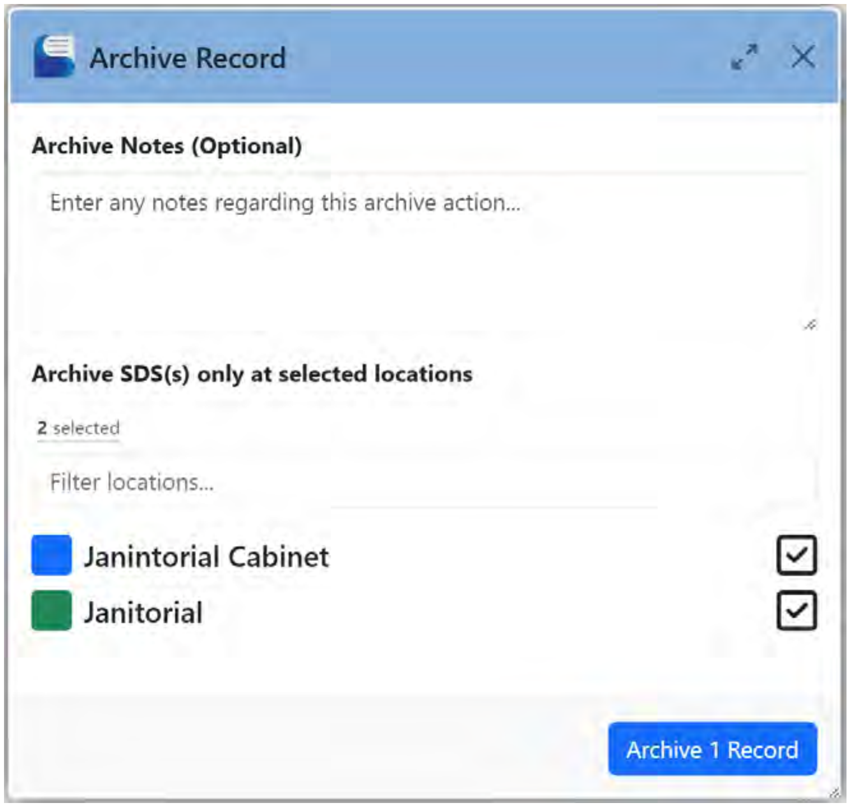


SELF-MANAGED CHEMICAL INDICATOR

Displayed universally, and indicates the record has been defined as ‘self-managed’. Clicking this action activates the “Self-Managed” table filter.

ARCHIVE / RESTORE RECORD

Displayed universally (often in the “More Actions” menu). This allows the user to mark a record as archived/unarchived at one or more locations. The “Archive Record” window provides a place to add a note, and select one or more locations (if more than one location assigned) where the record should be archived/unarchived.



DELETE RECORD

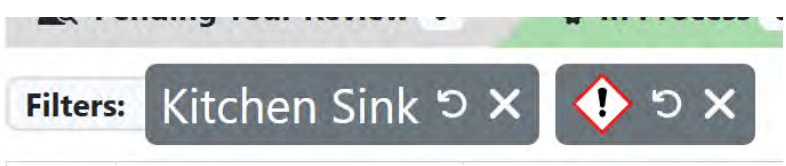
Displayed universally to administrators with delete chemical permissions. Removes the record completely.

FILTERING & SEARCH

By default, the table display available in each of the lifecycle stages will show every chemical currently in that status. The list can be filtered to show only specific data by using the available filters and search capabilities.

FILTER BY CLICK

By clicking on any pictogram or location tag you can immediately filter the table displays by that parameter. Your filters will appear in the top left-hand corner of the table.



Filters are applied to four lifecycle tables, and the number of matching records will be indicated beside the stage title. If multiple filters are selected, records returned will have to **satisfy all** filter criteria.

Remove a filter tag by clicking the ✕ close icon.

Invert a filter tag by clicking the ↺ reverse icon.

Inverted filters act as a "Not" – so in the case of the filter above, all chemicals will be shown with the exception of chemicals assigned to the Kitchen Sink.

The following properties can act as a filter.

- Location
- Pictogram
- Smart Tag
- Self Managed Chemicals

KEYWORD SEARCHING

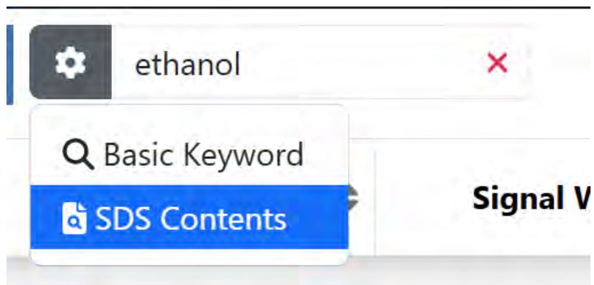
You can also filter your chemical lists by using our search feature which can be found above the chemical tables next to the stage selection bar.

BASIC SEARCH

The default keyword search is called the “basic search” and will filter your chemical records by searching the Product Identifier, Manufacturer, and AKA metadata fields attached to each chemical.

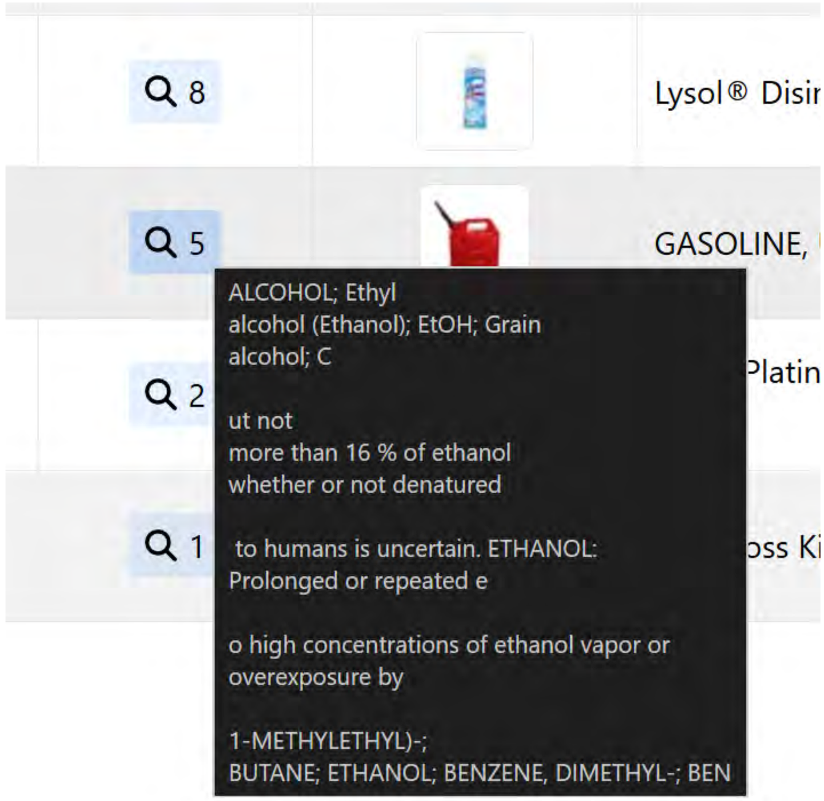
SDS CONTENTS SEARCH

You can also choose to search the contents of the safety data sheets within your library. Use the search settings button to open the search settings drop-down and switch to the SDS Contents search.



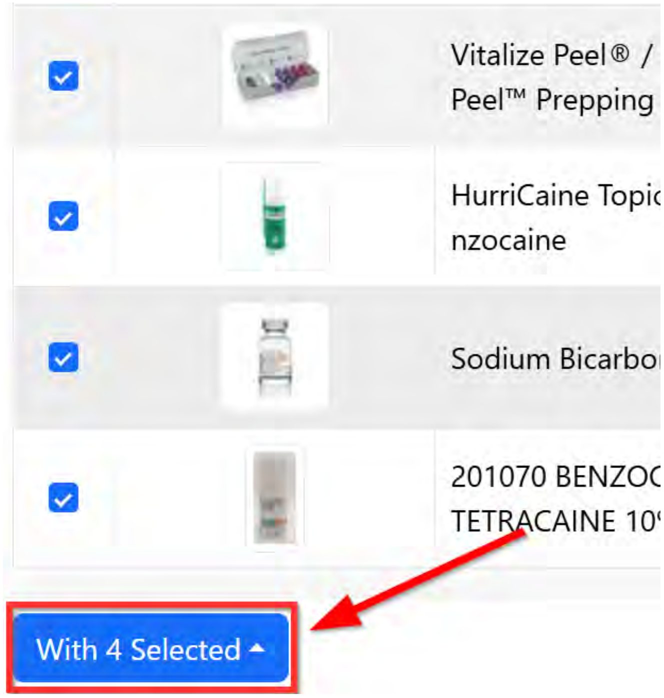
The SDS Contents search will look for your keyword within the text provided by the manufacturer for each safety datasheet.

When searching SDS Contents, a new column will appear at the left of your search results indicating the number of times the keyword was found in the document text. Hover over this button to see a brief snippet of the keyword’s appearance.



BULK ACTIONS

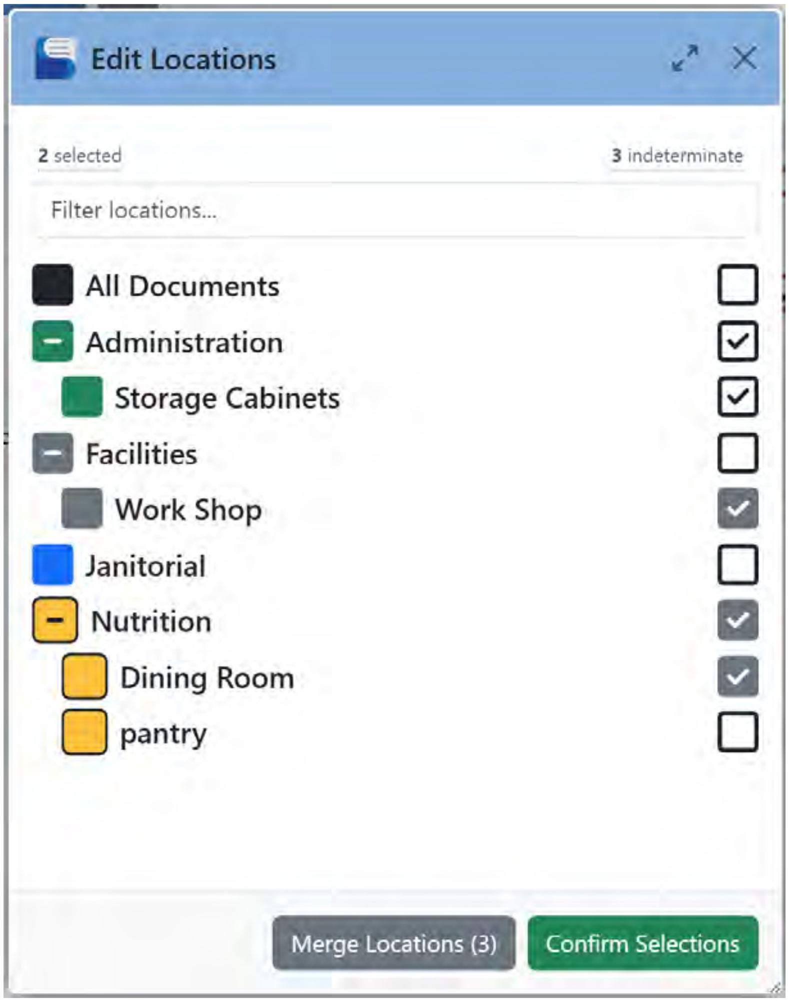
When you use the selection checkboxes to select one or more chemicals at a time you will enable the Bulk Actions found in the "**With Selected**" drop-down button on the bottom left hand corner of the screen.



Bulk Actions allow you to take an action on a group of chemicals at one time.

EDIT LOCATIONS

The **Edit Locations** bulk action, allows you to assign or unassign location tags to a group of chemicals at one time.



When the "Edit Locations" selection box opens, be sure to understand the meaning of the checkboxes shown.

Empty Checkbox
The chemicals in your selection are/will be unassigned from this location (if currently assigned)

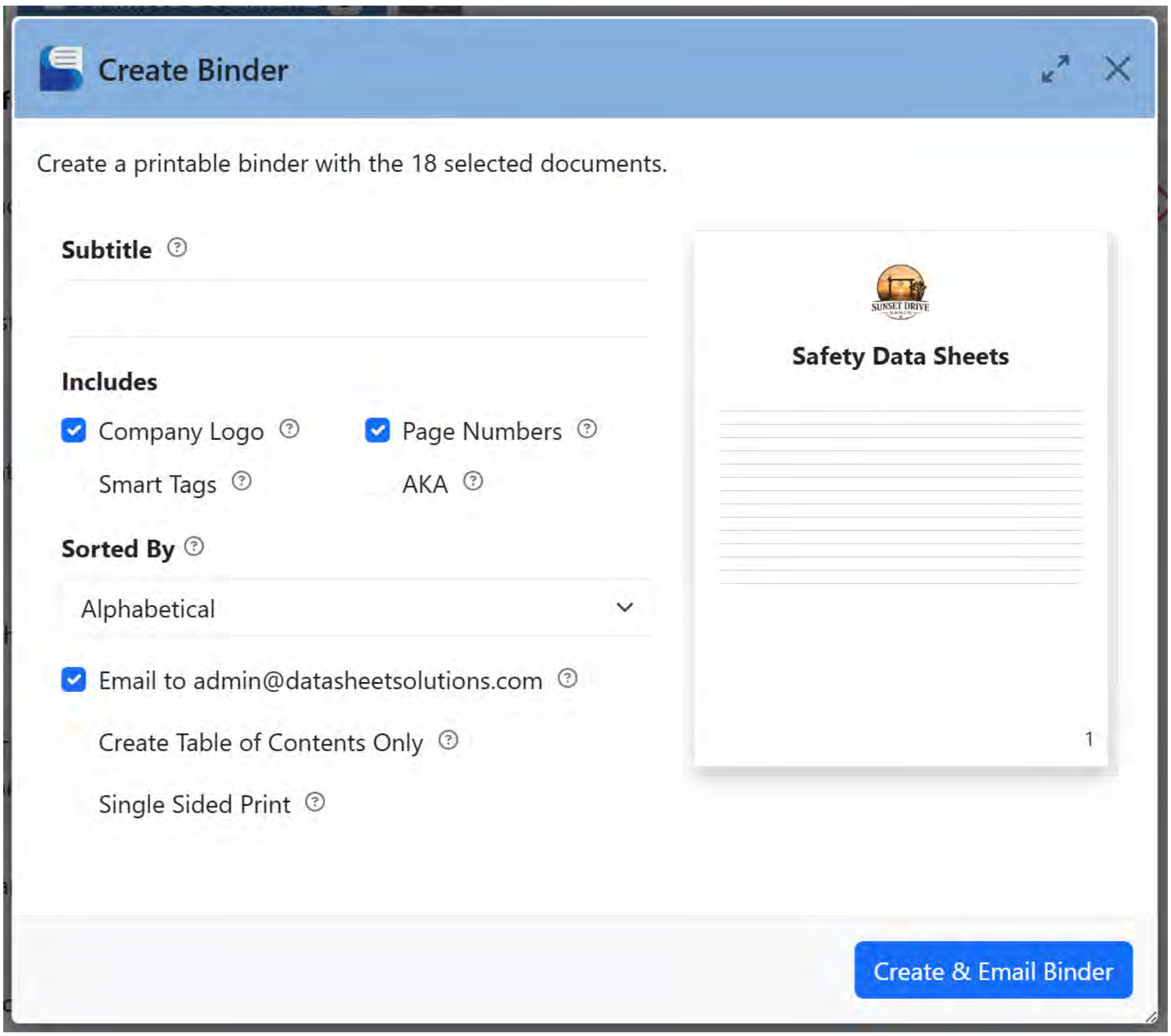
Checked Box (Indeterminate)
The grey checkbox indicates that some, but not all of the selected chemicals are assigned to this location. Tick the box again to assign all chemicals in the selection to the location. Click it a second time to remove the location from all of the selected chemicals. Leave the checkbox alone to maintain the current location assignments for each chemical.

Checked Box
The checked box indicates that all of the chemicals are/will be assigned to the selected location.

In circumstances where you have multiple records selected with varied location assignments, you will also have a "**Merge Locations"** button. Clicking this button will turn all "Indeterminate" checkboxes into fully checked boxes, assigning all the selected records to all of the same locations.

CREATE BINDER

The **Create Binder** action allows you to combine the selected chemicals into a single PDF file.



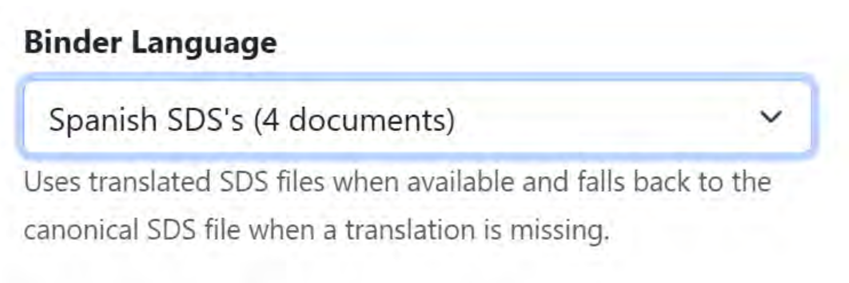
There are several options and configuration settings which can be used when creating a binder.

- **Subtitle** – Allows you to specify text to be used on the binder cover
- **Company Logo** – Renders the logo from the employee portal on the binder cover
- **Page Numbers** – Renders page numbers on all records and creates clickable numbers in the table of contents
- **Smart Tags** – Renders any assigned record smart tags after the product name in the table of contents
- **AKA** – Renders the AKA text of each record below the product name in the table of contents
- **Email to {your email}** – Emails you a link to the completed binder once it is finished rendering (so you don't have to wait for it)
- **Create Table of Contents Only** – Only creates the table of contents, suitable for use when updating a previously created binder with new documents
- **Single Sided Print** – Ensures the page numbers always appear on the bottom right-hand corner of each SDS when not printing double-sided.

You can also choose how the table of contents and records are sorted. Your options are:

- **Alphabetical** – Orders each record alphabetically by product identifier.
- **Current Order** – Orders them however the current table is ordered (allows you to order by things like addition date, manufacturer name, etc)

If any of the selected records have been translated into another language, you will also have the option to select which language you want the binder to use.



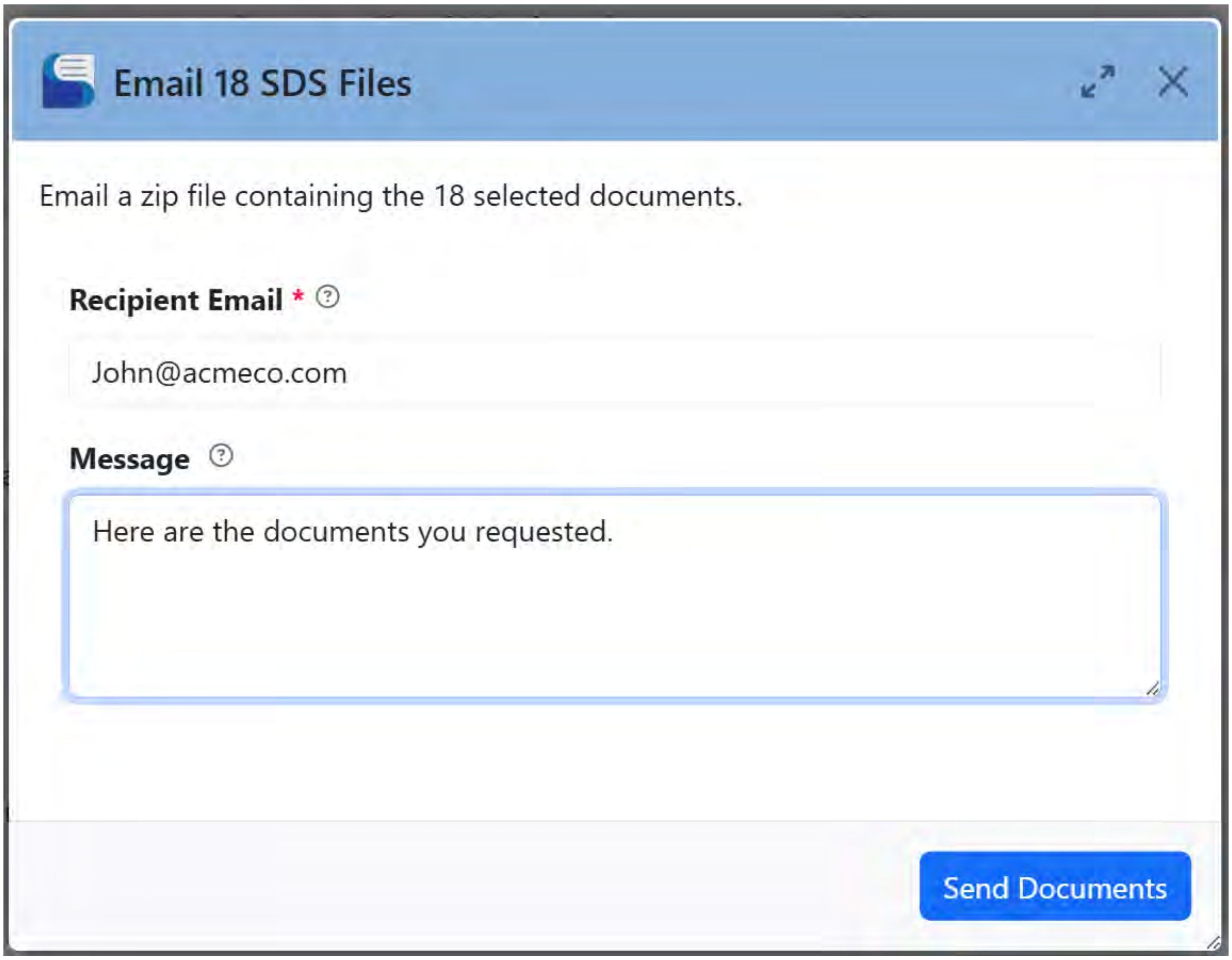
If you select a document that does not have the selected translation, the English version will be used. The Table of Contents will continue to be in English.

DOWNLOAD SDS FILES

The **Download SDS Files** bulk action allows you to create a compressed ZIP archive of all the selected documents and save them to your computer. Each file will be renamed according to their product identifier.

EMAIL SDS FILES

The **Email SDS Files** bulk action allows you to send a compressed ZIP archive of the selected documents to any email address.



SEND TO.....

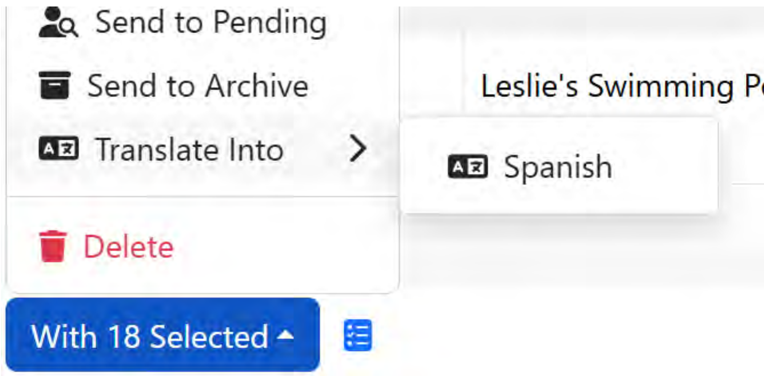
When accessing the bulk actions menu, you may also be provided the option to move all of the selected files into a different chemical request stage.

REQUEST SDS AP

When accessing the bulk actions menu from the "Pending Chemicals" stage, you will be provided the option to request the SDSs for all currently selected requests. This moves the chemical requests into the "In Process" lifecycle stage.

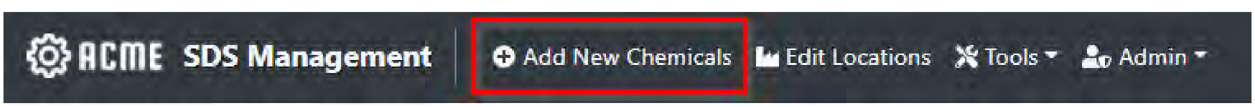
TRANSLATE INTO

If you have enabled translation languages, the bulk actions menu will also contain a menu allowing you to set the selected records for translation into the chosen language.



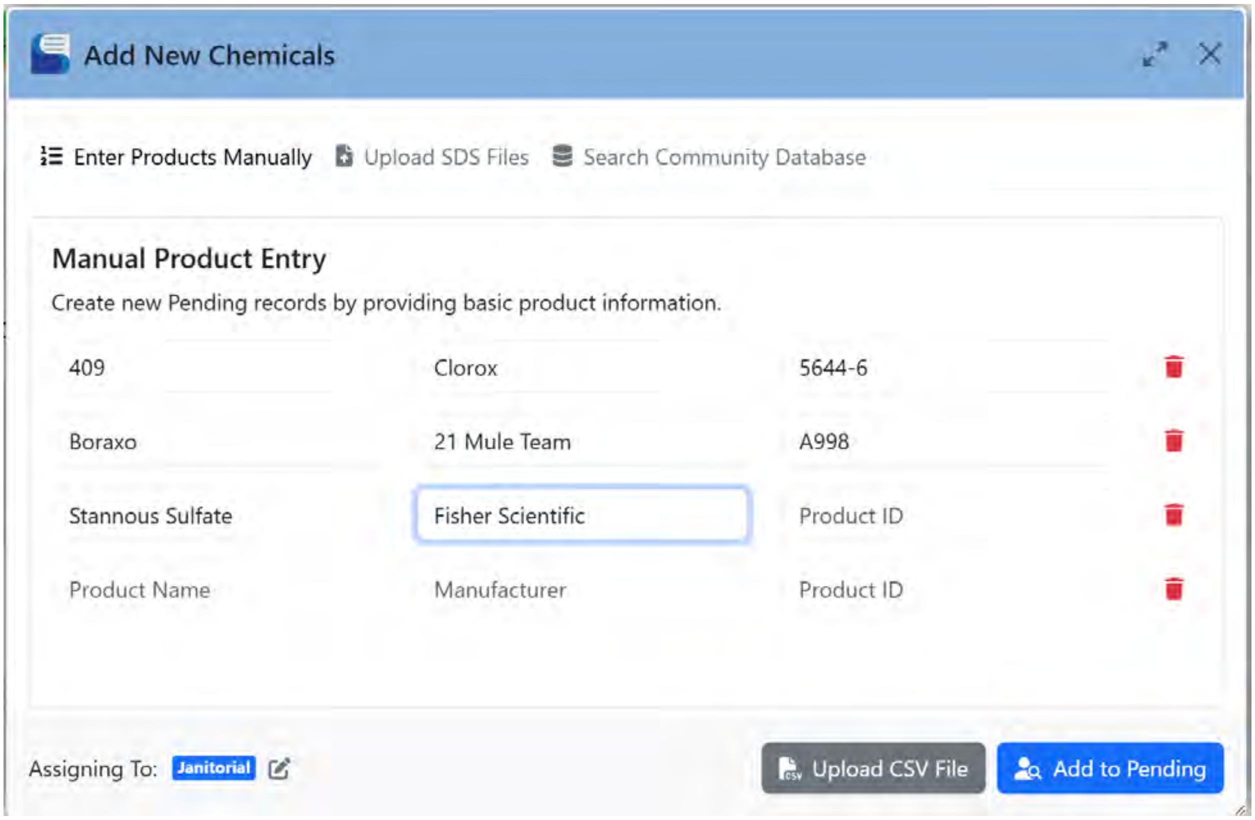
ADDING NEW CHEMICALS

Adding new chemicals to your library is one of the most basic tasks you will find yourself undertaking. We provide several different ways to get your chemical requests into the request lifecycle. The first three methods can be kicked off by an administrator by using the "**Add New Chemicals"** button at the top of your admin dashboard.



MANUAL ENTRY

Chemical requests can be added manually by simply providing information about any particular product. Each request will require at least the product and manufacturer name. If possible, providing the product ID usually speeds the SDS research process as well.



CSV UPLOAD

If you already have details about your chemical inventory available in Excel, you can easily import the data as requests by uploading a CSV file which contains the required information. Structure your CSV as follows:

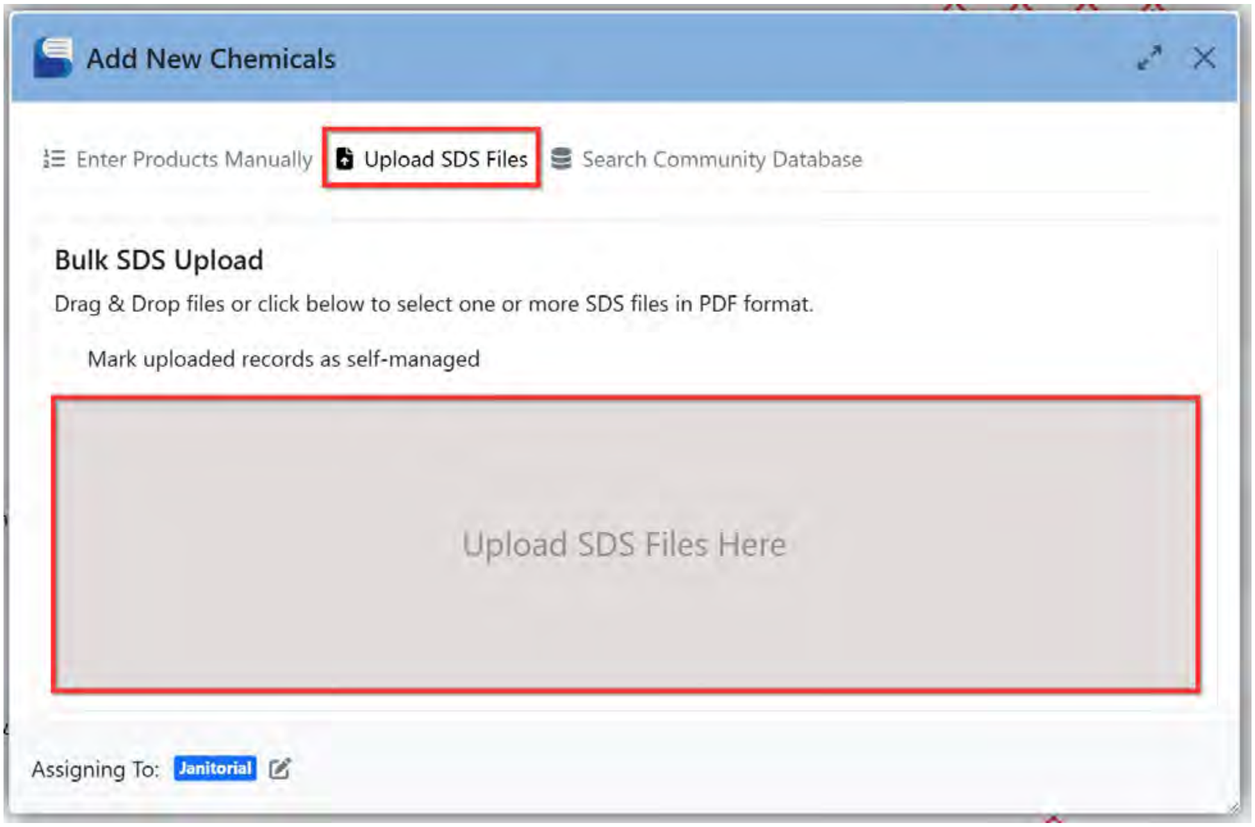
Column A: **Product Name**

Column B: **Manufacturer Name**

Column C: **Product ID**

UPLOAD SDS FILES

If you have already located safety data sheets in PDF format, you can also create requests by uploading those directly into the system. Use the “Upload SDS Files” tab to click and upload or drag and drop SDS files into your library.



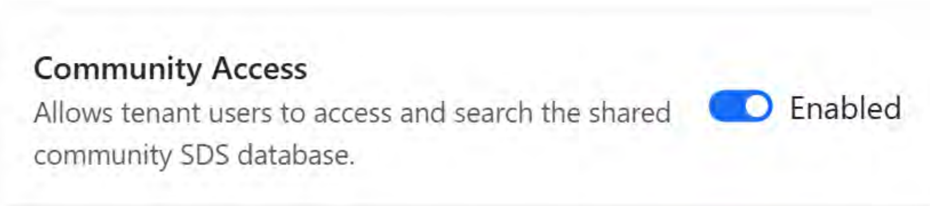
When uploading PDF files, they will automatically be run through Optical Character Recognition (if required), auto-indexed, and set to either the pending or in-process stage depending on your package.

When uploading older files, or when scanning and uploading your documents, the OCR process may take a significant amount of time to complete depending on the number of pages.

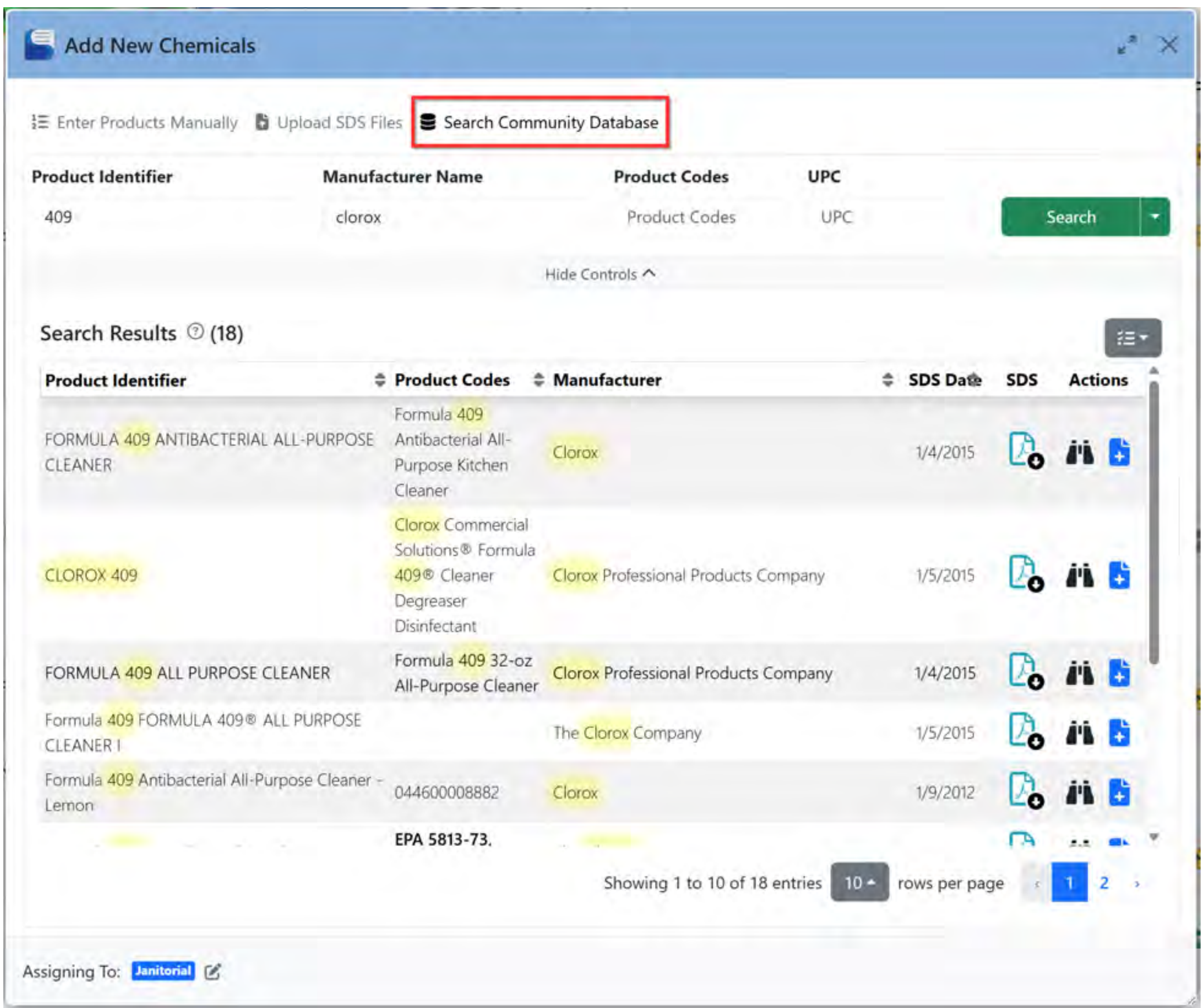
For Autopilot subscribed AP customers, the "**Mark uploaded records as self-managed**" checkbox will also be available. This allows you to mark the record so it is not sent to the fulfillment team. This functionality is perfect for companies who create and maintain their own SDSs, and would like to maintain those records internally, but still have them available in the SDS portal. You can exceed your Autopilot limit by 10%.

SEARCH COMMUNITY DATABASE

If your portal is configured to allow access to the community database, you will also have the ability to search and add chemicals from that database in the Add New Chemicals window.



The community database is a crowd-sourced SDS database built from customer uploaded documents. The Data Sheet Solutions team does not verify, maintain, or update any records contained within the community library.



Exact text matches will be highlighted in the results for easier comparison. The **Actions** column in the Search Results introduces two new actions:

Link to Your Record – This action will assign the search result to your request

Merge With Existing – When this action is shown instead of the **Link to Your Record** action, this means the search result is **already** in your library and is a duplicate. Clicking this button will merge the record with the existing record, retaining location assignments, inventory records and custom properties from both records.

PERFORMING AN INVENTORY

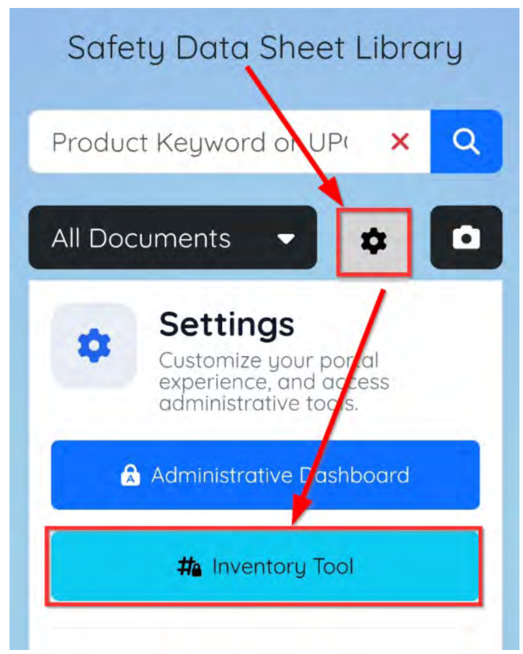
The Data Sheet Solutions SDS Management system also includes a full-featured mobile chemical inventory system. If you would like to build your chemical inventory from the ground up, our inventory system is a great way to get your HazCom program off to a good start.

INVENTORY TOOL

Because the admin inventory application is designed for your mobile device, the tool is built right into the employee portal. Use the icon to access the settings menu.

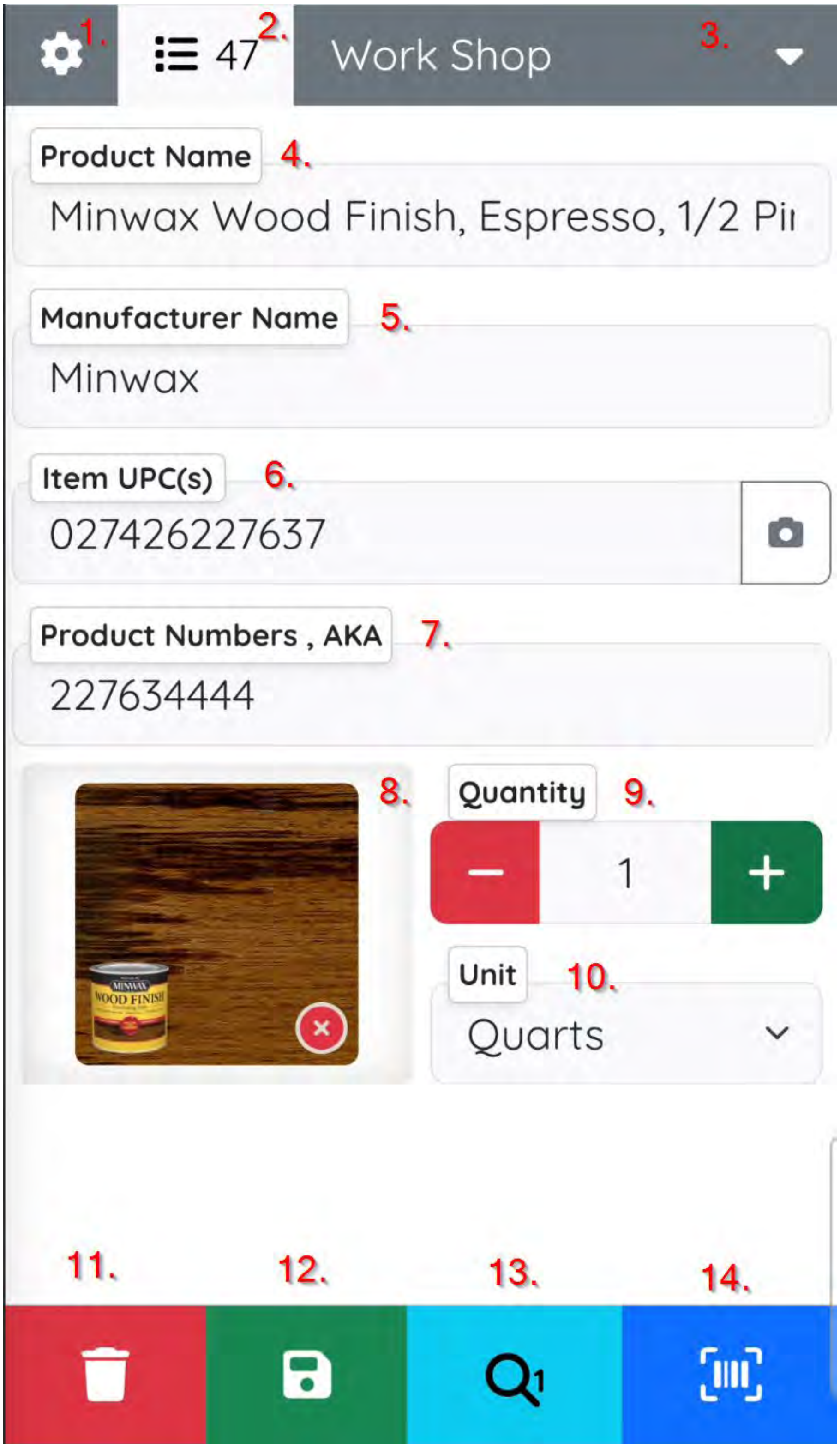
Click the **Inventory Tool** button.

Log in with your admin, or Location POC account.



THE INVENTORY FORM

The inventory form provides fields to collect information about the products you locate at your facility.

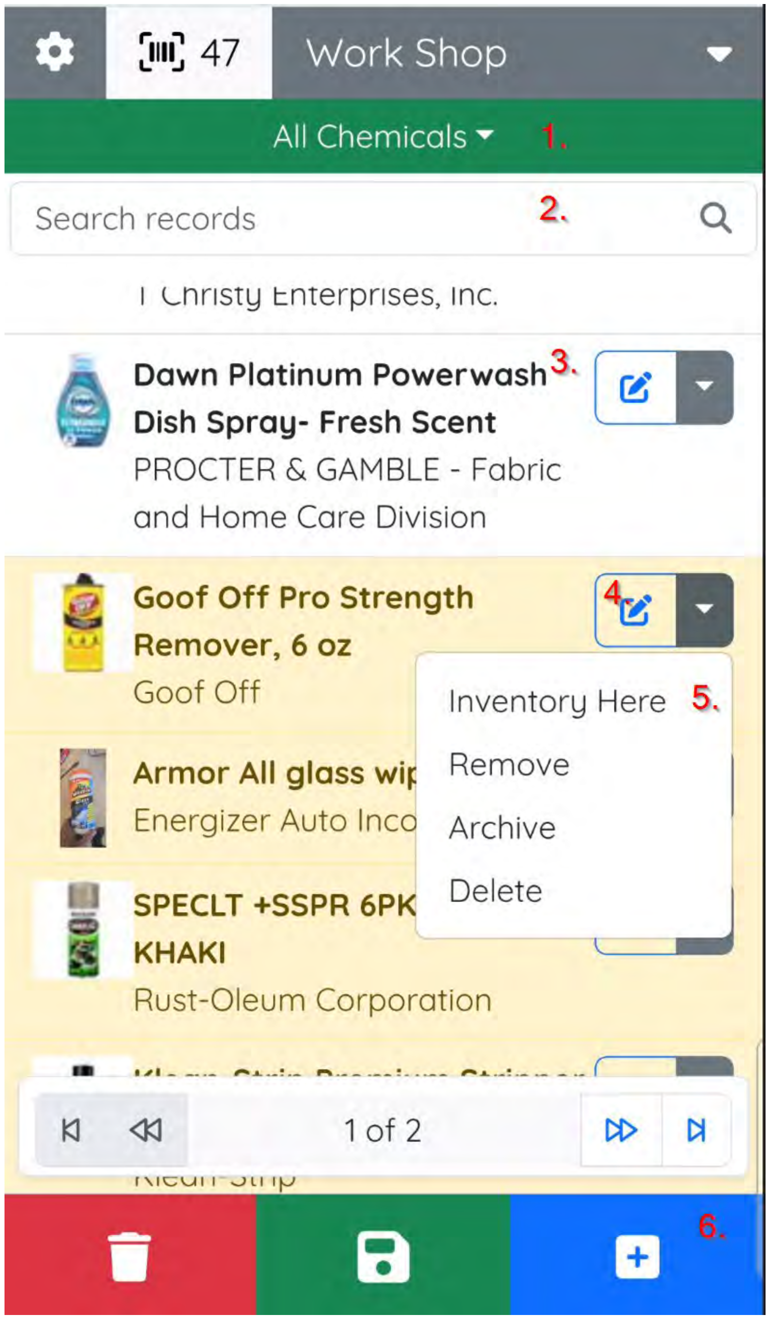


1. **Settings –** Opens the settings menu, where you can enable **Quantity Controls,** or go back to the Admin Dashboard or Employee Portal

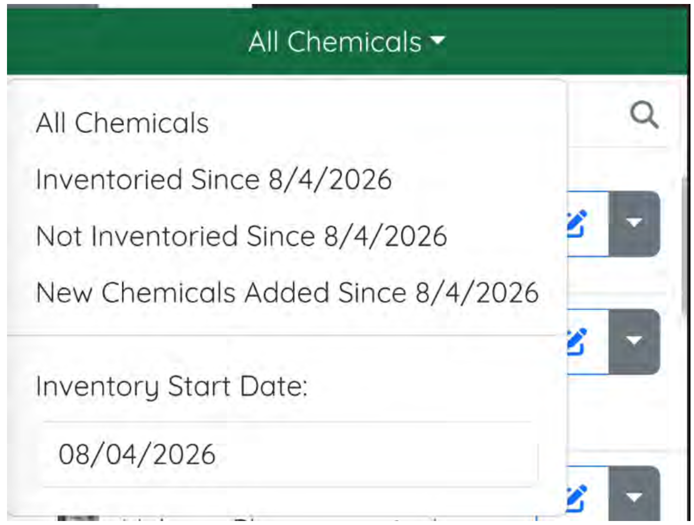
2. **List View (plus Quantity)** – Switches between Inventory Form and Inventory List. Also shows the total number of records assigned to the currently selected location.
3. **Location Selector** – Provides you the ability to select existing or create new locations to use in your inventory. The chemicals you save will be assigned to the location shown here.
4. **Product Name**
5. **Manufacturer Name**
6. **Item UPC**
7. **Product Number, AKA** – Any text here will be searchable by employees in the employee portal.
8. **Product Photo** – Can be a stock image loaded automatically after scanning a UPC, or you can click and take a photo of the product. If the product has no UPC to scan, the product photo you take will be analyzed in an attempt to automatically identify the Product Name, Manufacturer Name, and Product Number.
9. **Quantity (default disabled)** – The number of units at the location
10. **Units (default disabled)** – The type of unit
11. **Delete** – Clears the form without saving so you can start again.
12. **Save** – Saves the record and assigns it to the currently selected location
13. **Search** – Allows you to search the community library for potential SDS match
14. **Scan UPC** – Activates your camera for UPC scanning, where the form can be filled automatically based on the information returned.

THE INVENTORY LIST

While in inventory mode, you can also navigate back to the chemical list to view information about the chemicals in your inventory and their status.



1. **Inventory Filter** – The inventory filter allows you to filter the list of chemicals shown. The filter allows you to browse a location's chemical list based on inventory status.



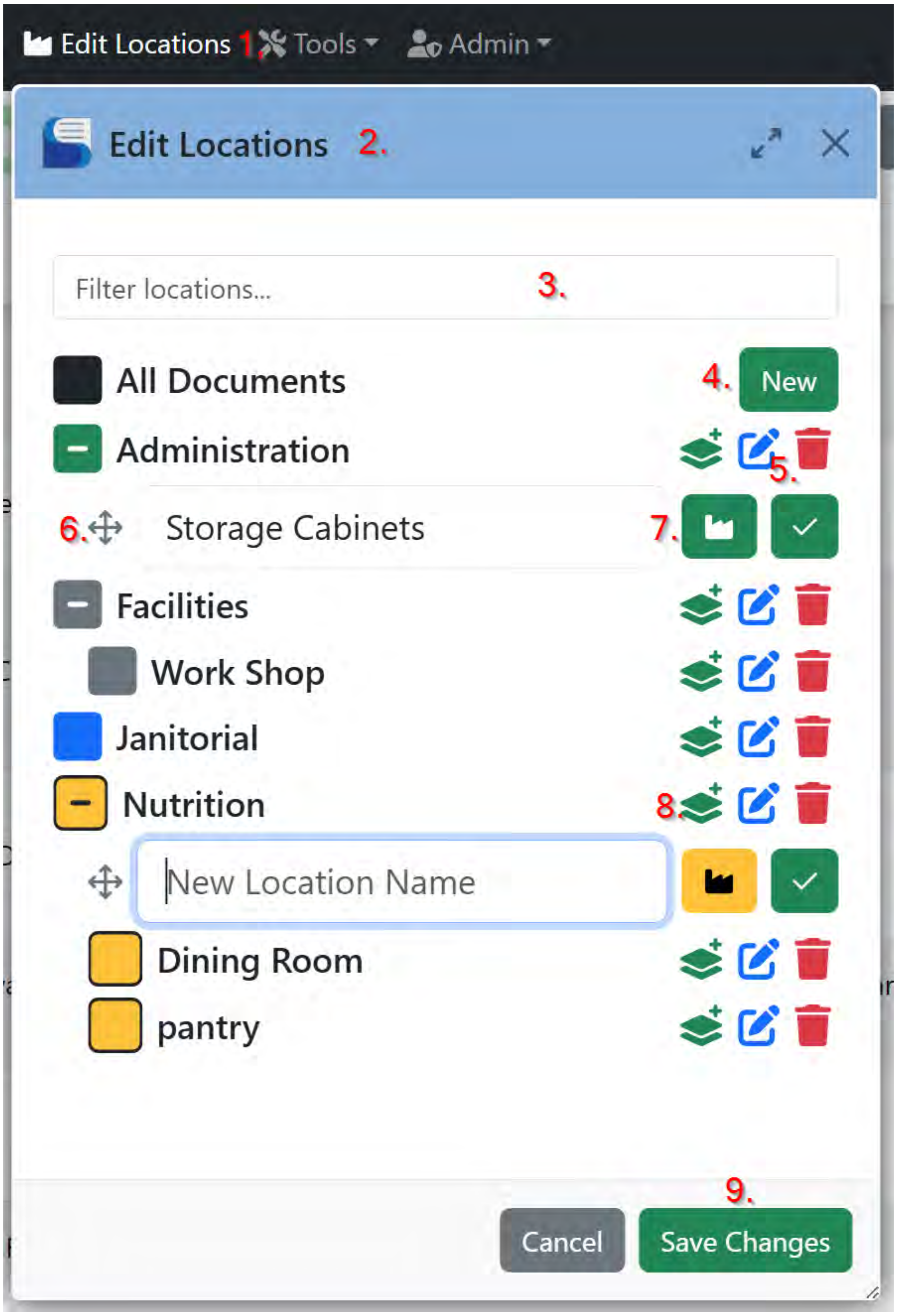
- **All Chemicals**
  Shows all chemicals whether they have been inventoried or not.
- **Inventoried Since**
  Will show all chemicals inventoried at your currently selected location on or after the date indicated.
- **Non-Inventoried Since**
  Will show you all chemicals assigned to the currently selected location that have NOT been inventoried on or after the date indicated.
- **New Chemicals Added Since**
  Will show you only new Chemicals that have not been previously inventoried at the selected location.

Set the **Inventory Start Date** to control how these filters are applied.

2. **Search Records** – This box allows you to search the filtered records by keyword.
3. **Record** – The individual records are shown with optional image, product name, and manufacturer name. A record will have a yellow background if it is awaiting approval or processing in the "**Pending Your Review**" table. A record has a white background if it is already in your Active Library.
4. **Edit Record Button** – The edit record button opens the record in the **Inventory Form** view, so you can make changes and Save them.
5. **Edit Drop Menu – Provides you access to the following actions in one click.**
   a. **Inventory Here** – Update the record's inventory information to show that the product was marked as present in the selected location as of today's date. (Moved chemicals from "Not Inventoried Since" status to "Inventoried Since")
   b. **Remove** – This removes the currently selected location for the record's location list.
   c. **Archive** - This marks the record as archived at the currently selected location on today's date.
   d. **Delete** – This deletes the record entirely

EDIT LOCATIONS

You can group safety data sheets together into collections which we refer to as "Locations". A Location can represent a physical place (shelf, cabinet, room, building, state, region), an administrative area of responsibility (department, line of business, etc.), a characteristic (gases, cleaning products). There is no definition, and you can create as many of these collections as you need. Safety Data Sheets are not “inside” any particular location, they are assigned to them. Safety data sheets can be assigned to as many locations as needed.

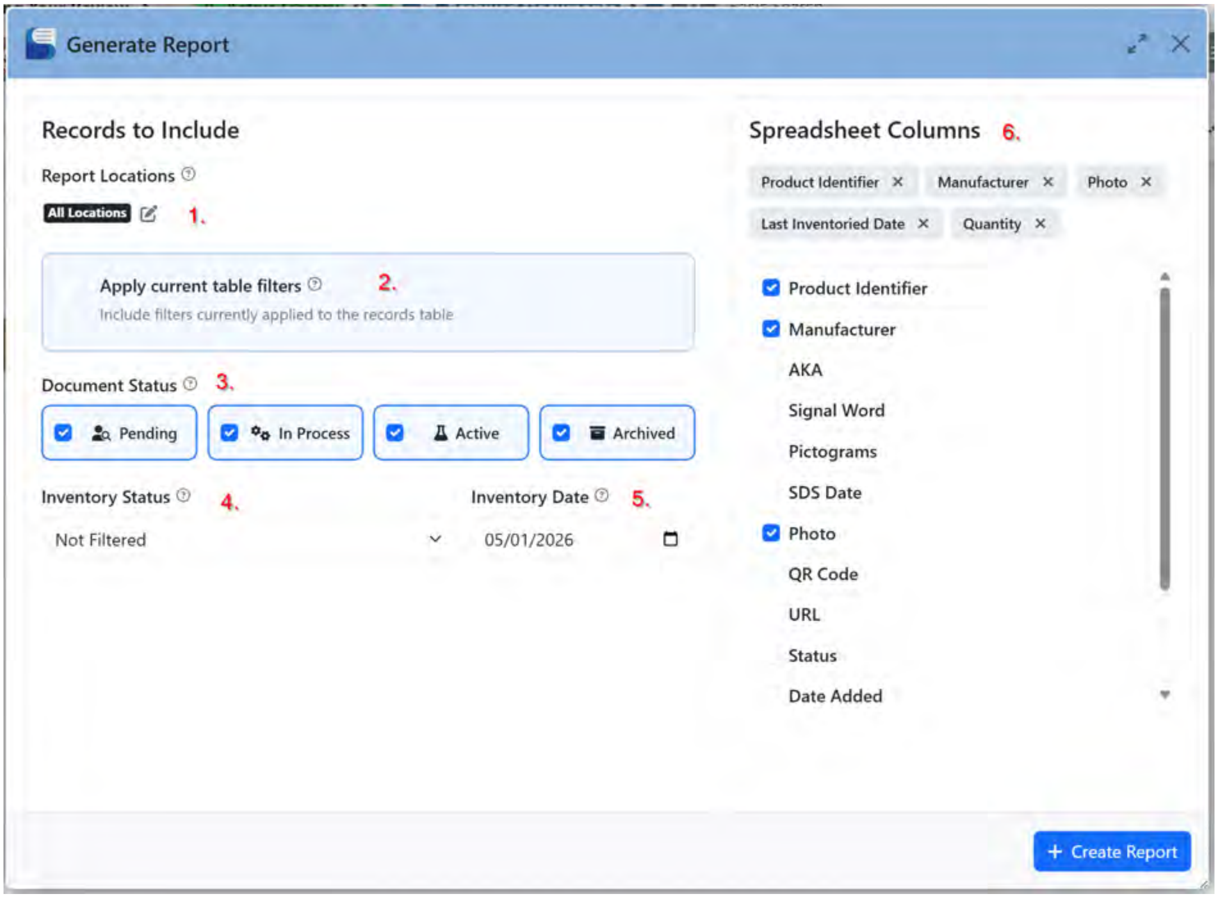


1. **Edit Locations Menu Item –** Click to open the Edit Locations window

2. **Edit Locations Window** – A filterable list of locations available for your selection or editing. LocationPOC accounts will show only those locations assigned to them.
3. **Location Filter** – Allows you to filter your list by typing in all or part of the location name you are looking for.
4. **New Top Level Location Button** – Adds a new "Top Level" location. You will have to provide a name for it before you can save.
5. **Edit Location Button** – This button will put the location into "Edit Mode", where you can move, rename, update the color, or delete a location.
6. **Move Location Handle** – Available in Edit mode, click and drag the location to a new spot in the location tree. You can use this to move a location to the top level, or so it is nested beneath a different location. You cannot use this to reorder locations. Locations are always ordered alphabetically.
7. **Location Color Selector** – Allows you to change the color of the location
8. **Add Sub Location Button** – Adds a new location beneath the selected location. You will have to provide a name for it before you can save.
9. **Save Changes Button** – Checks that all of your changes are valid, and saves them.

REPORTS

The Reports window allows you to export selected data to an Excel spreadsheet.



1. **Location Selector** – Defaults to all locations, but can be edited to only show records assigned to one or more locations. Each location will be provided its own tab in the output workbook.
2. **Current Table Filters Option** – This option allows you to carry forward any table filters you have currently active into the report. This allows for keyword search, location, pictogram, smart tag and self-managed filters, as well as any combination of those.
3. **Document Status** – Allows you to restrict the records based upon record status
4. **Inventory Status –** Allows you to select any of the following inventory filters:
    a. **Not Filtered**
       Shows all chemicals whether they have been inventoried or not.
    b. **Inventoried Since**
       Will show all chemicals inventoried at each tab location on or after the date indicated.
    c. **Non-Inventoried Since**
       Will show you all chemicals assigned to the tab location that have NOT been inventoried on or after the date indicated.

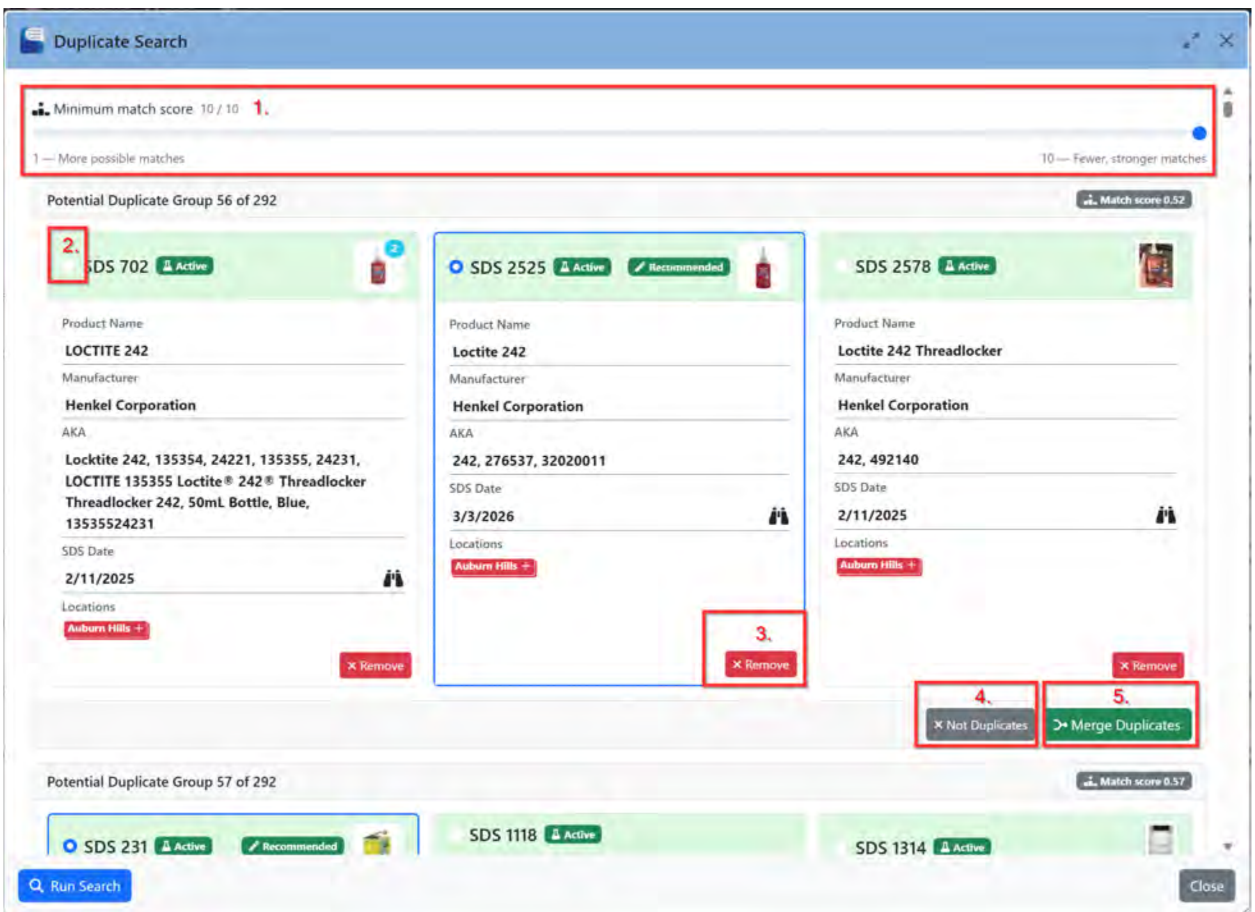
d. **New Chemicals Added Since**

Will show you only new Chemicals that have not been previously inventoried at the tab location.

5. **Inventory Date** – Set this to the desired cut-off date for the Inventory Filter
6. **Spreadsheet Columns –** The output columns rendered on each location tab.

DUPLICATE SEARCH

The Duplicate Search tool provides you a way to search your library for potential duplicates, and combine them when found.

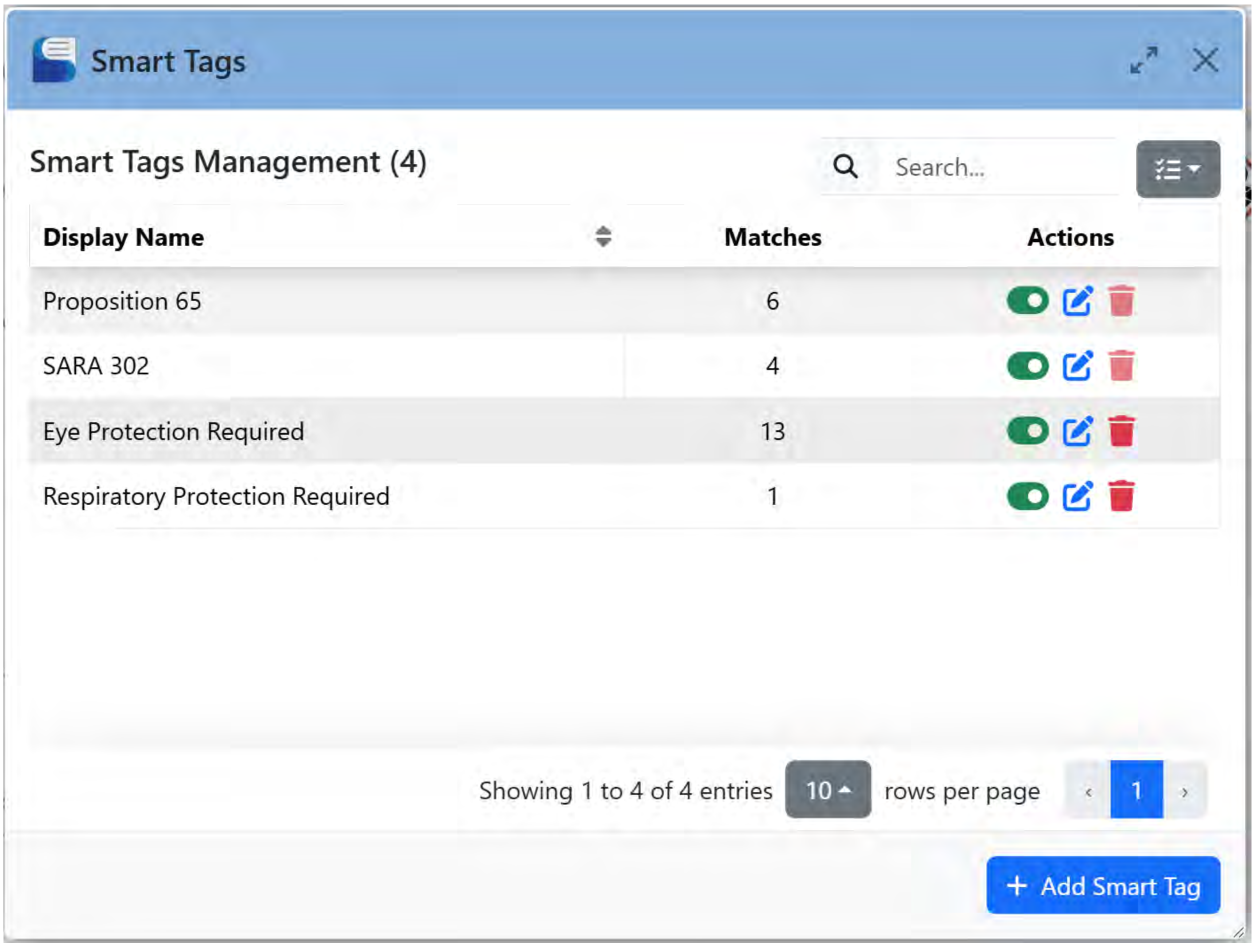


1. **Match Strength Slider** – Adjustment controls how “similar” the record information must be to be considered a possible duplicate.
2. **Result Selector** – The result that will remain after the merge.

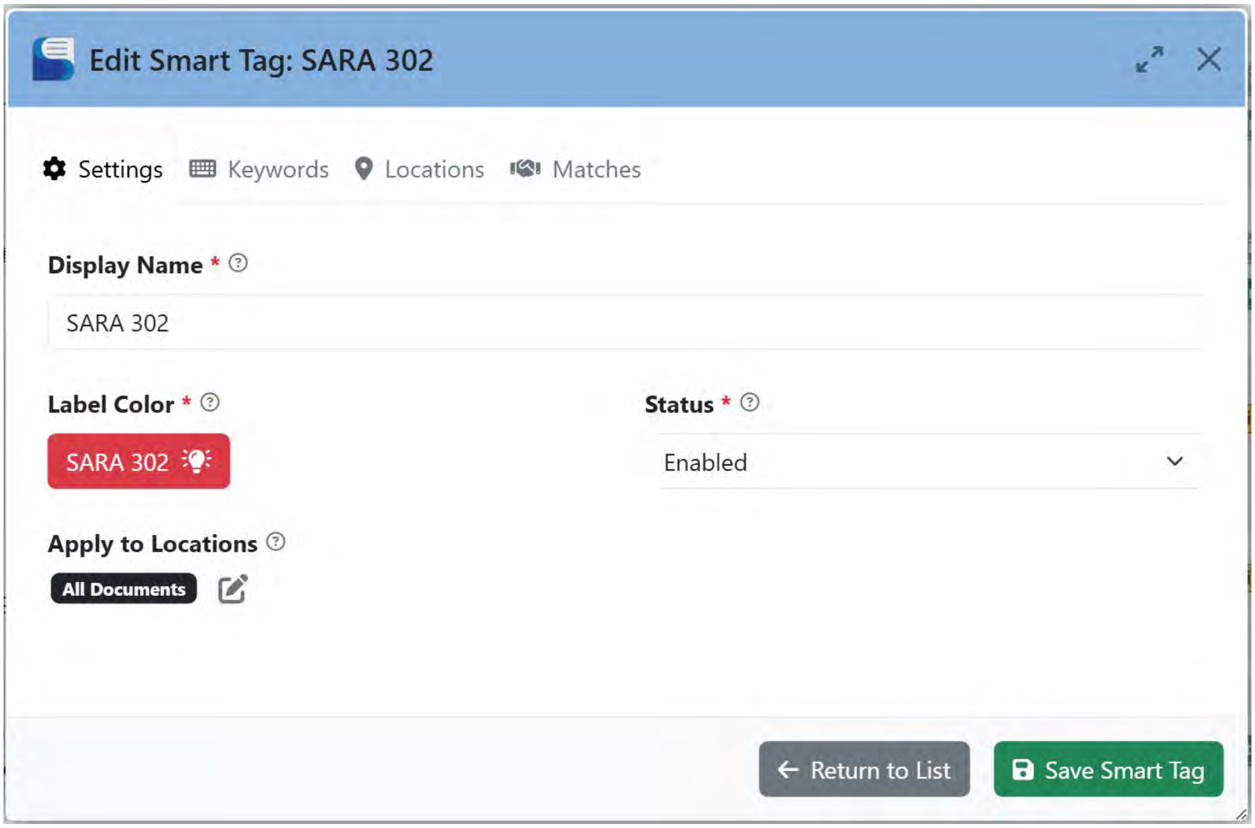
3. **Match Remove button** – Allows you to remove a single nonduplicate match.
4. **Not Duplicates Button** – Removes the duplicate group.
5. **Merge Duplicates Button** – Combines the remaining results into a single record while maintaining location assignments and other custom properties.

SMART TAGS

The Smart Tag window allows you to manage and create new smart tags for your library. Smart Tags are standing SDS content keyword searches which allow you to monitor your SDS library.

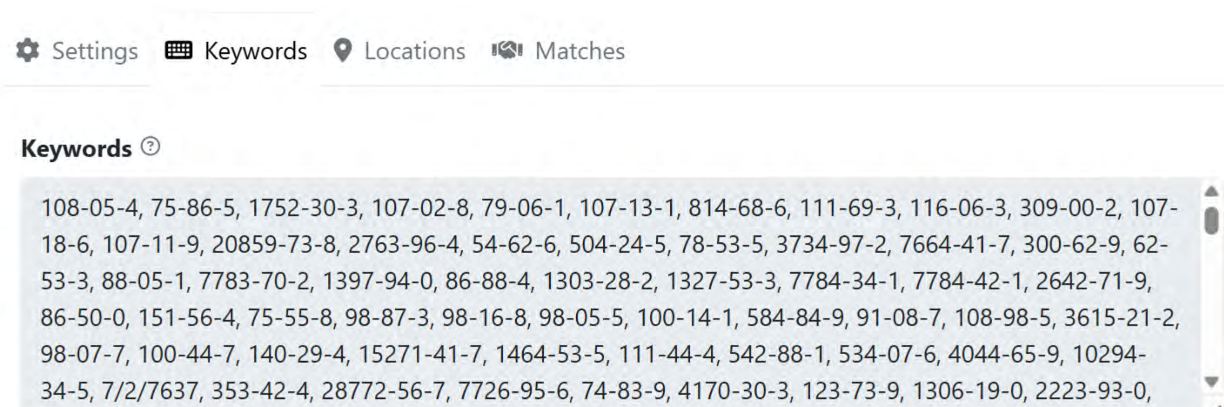


To create a new smart tag, click the **Add Smart Tag** button. This will open the Smart Tag editor.



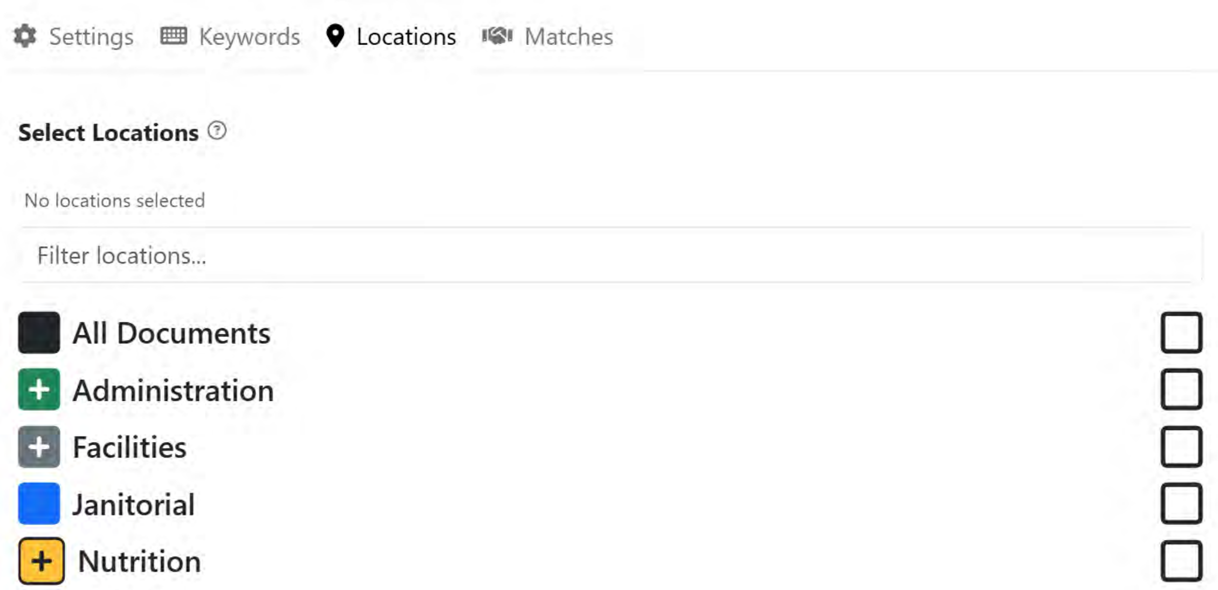
The Smart Tag editor is composed of 4 panels. The **Settings** panel provides access to:

- **Display Name** – The name shown in the smart tag.
- **Label Color** – The color of the smart tag.
- **Location Selection** - The location where a record must be assigned to be eligible for the smart tag to be applied.
- **Status** – Whether the smart tag is currently active or not.

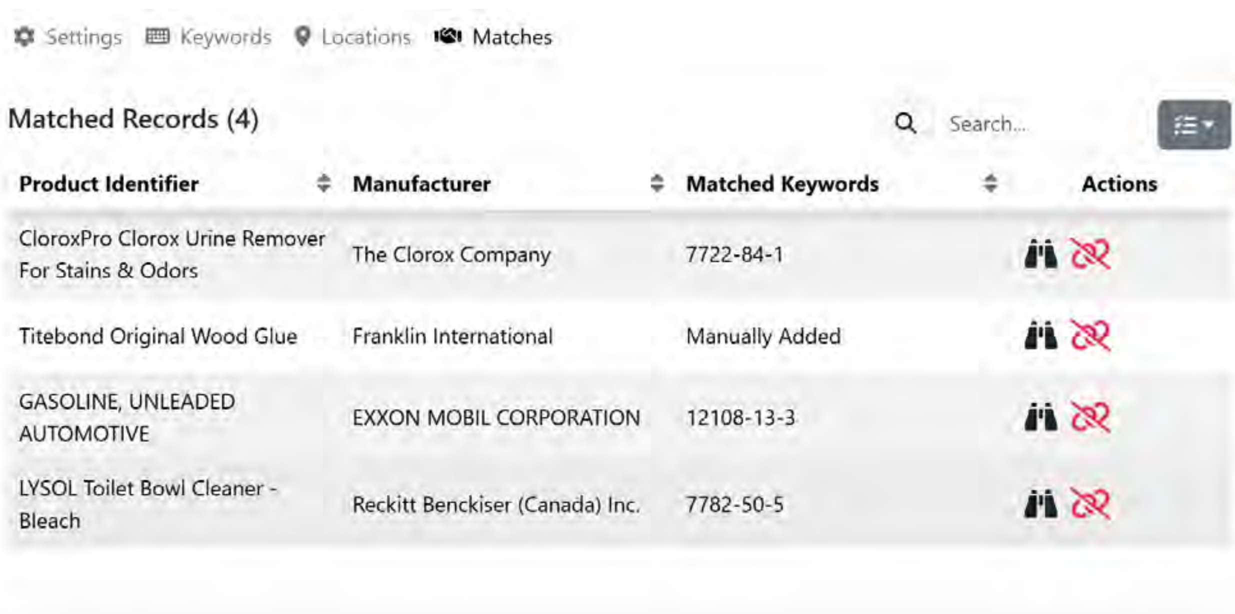


The keywords panel allows you to define the keywords you want to search for when determining whether a smart tag applies. The **SARA 302** and **Proposition 65** smart tags are globally defined by Data Sheet Solutions, and cannot be edited.

Your smart tag can search for an unlimited number of keywords. Separate each keyword with a comma.



The Locations panel allows you to restrict which records are eligible for a smart tag. Check one or more locations to require a record be assigned there before the smart tag is applied.

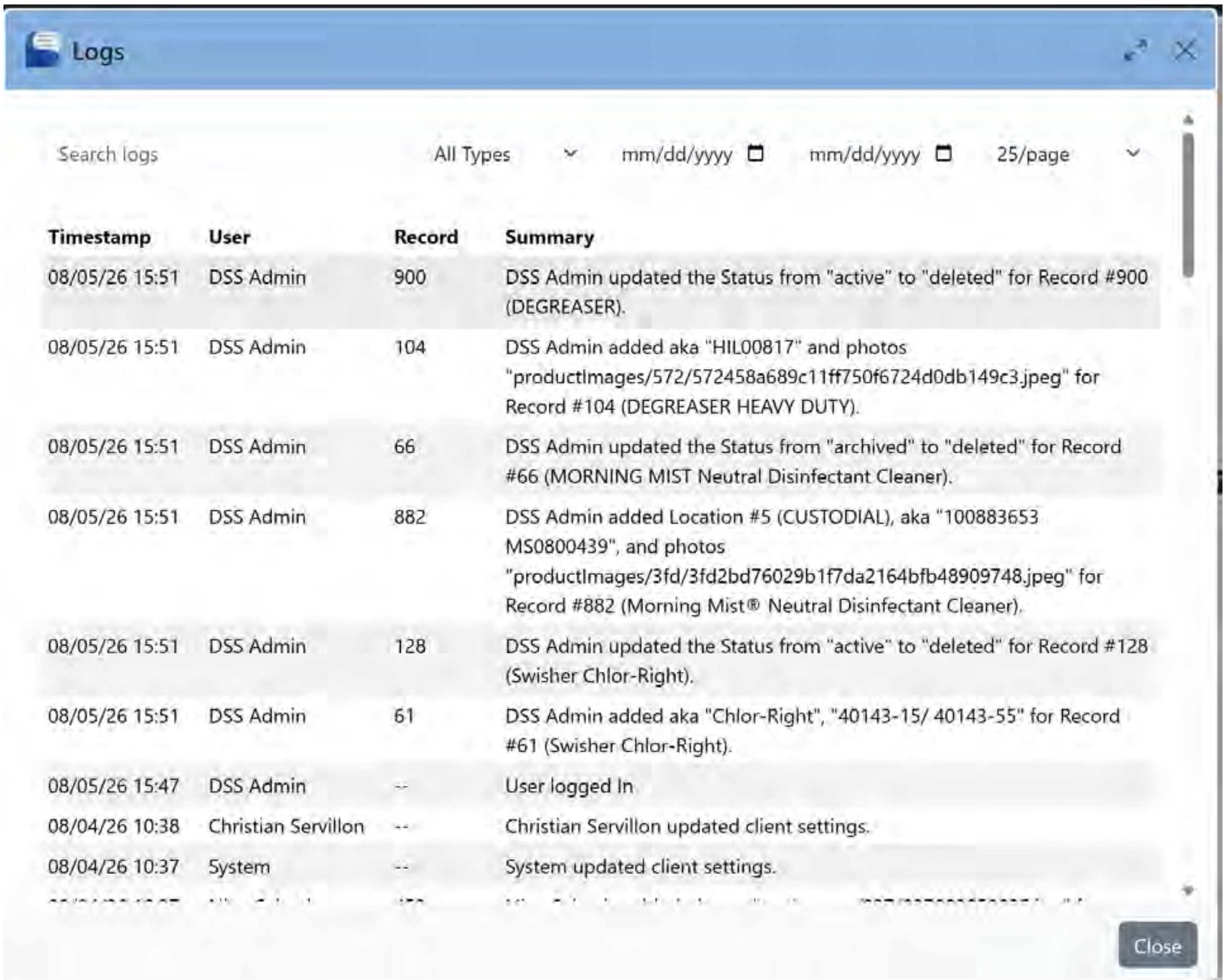


Product Identifier	Manufacturer	Matched Keywords	Actions
CloroxPro Clorox Urine Remover For Stains & Odors	The Clorox Company	7722-84-1	
Titebond Original Wood Glue	Franklin International	Manually Added	
GASOLINE, UNLEADED AUTOMOTIVE	EXXON MOBIL CORPORATION	12108-13-3	
LYSOL Toilet Bowl Cleaner - Bleach	Reckitt Benckiser (Canada) Inc.	7782-50-5	

The **Matches** panel will show you the records where the smart tag has been applied, along with one or more matched keywords. You can use the Unlink action to manually remove a smart tag.

LOGS

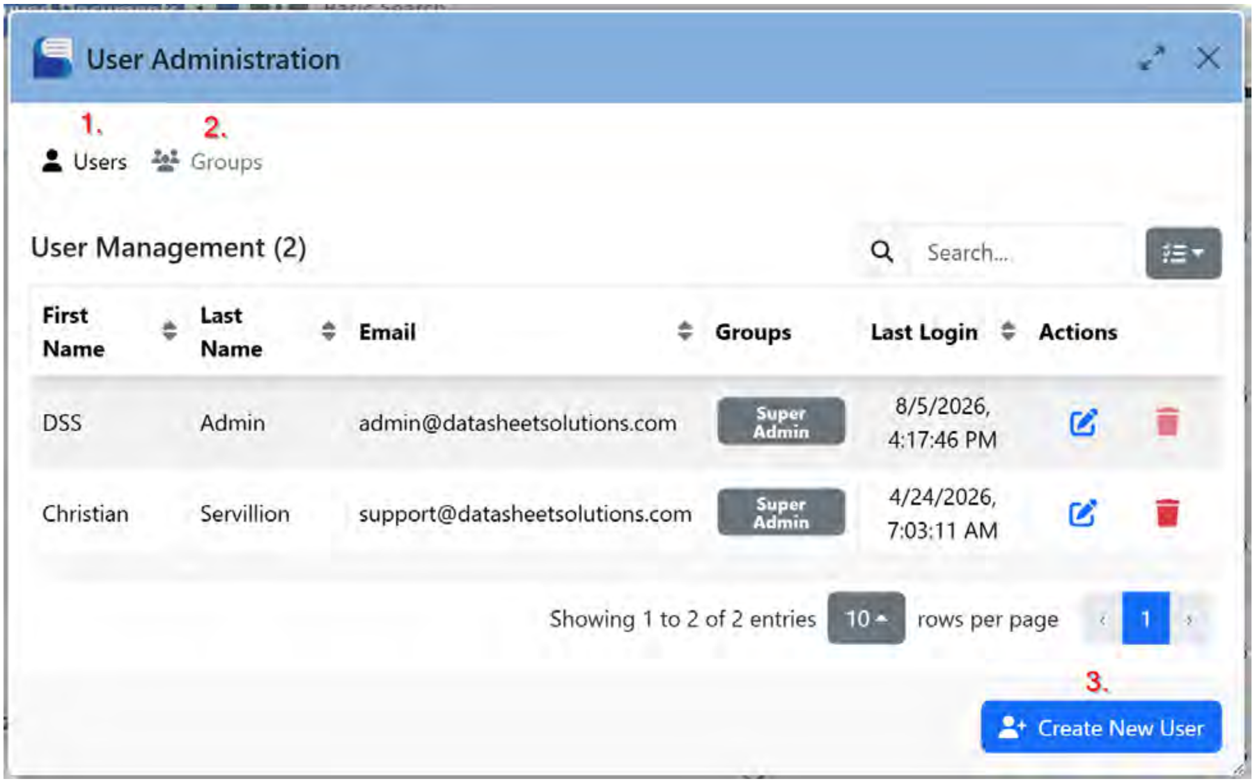
The Logs window allows you to view and search the portal logs, which are created when interacting with the system.



Timestamp	User	Record	Summary
08/05/26 15:51	DSS Admin	900	DSS Admin updated the Status from "active" to "deleted" for Record #900 (DEGREASER).
08/05/26 15:51	DSS Admin	104	DSS Admin added aka "HIL00817" and photos "productImages/572/572458a689c11ff750f6724d0db149c3.jpeg" for Record #104 (DEGREASER HEAVY DUTY).
08/05/26 15:51	DSS Admin	66	DSS Admin updated the Status from "archived" to "deleted" for Record #66 (MORNING MIST Neutral Disinfectant Cleaner).
08/05/26 15:51	DSS Admin	882	DSS Admin added Location #5 (CUSTODIAL), aka "100883653 MS0800439", and photos "productImages/3fd/3fd2bd76029b1f7da2164bfb48909748.jpeg" for Record #882 (Morning Mist® Neutral Disinfectant Cleaner).
08/05/26 15:51	DSS Admin	128	DSS Admin updated the Status from "active" to "deleted" for Record #128 (Swisher Chlor-Right).
08/05/26 15:51	DSS Admin	61	DSS Admin added aka "Chlor-Right", "40143-15/ 40143-55" for Record #61 (Swisher Chlor-Right).
08/05/26 15:47	DSS Admin	--	User logged In
08/04/26 10:38	Christian Servillon	--	Christian Servillon updated client settings.
08/04/26 10:37	System	--	System updated client settings.

USER MANAGEMENT

The User Administration window allows you to view and modify administrative accounts.



The User Administration window consists of two panels.

1. **Users Panel** – The Users Panel allows you to view, edit, and delete existing administrators.
2. **Groups Panel** – The Groups Panel allows you to view, edit, and delete administrative groups.
3. **Create New User Button** – Opens the Create New User window.

Group Management (3)

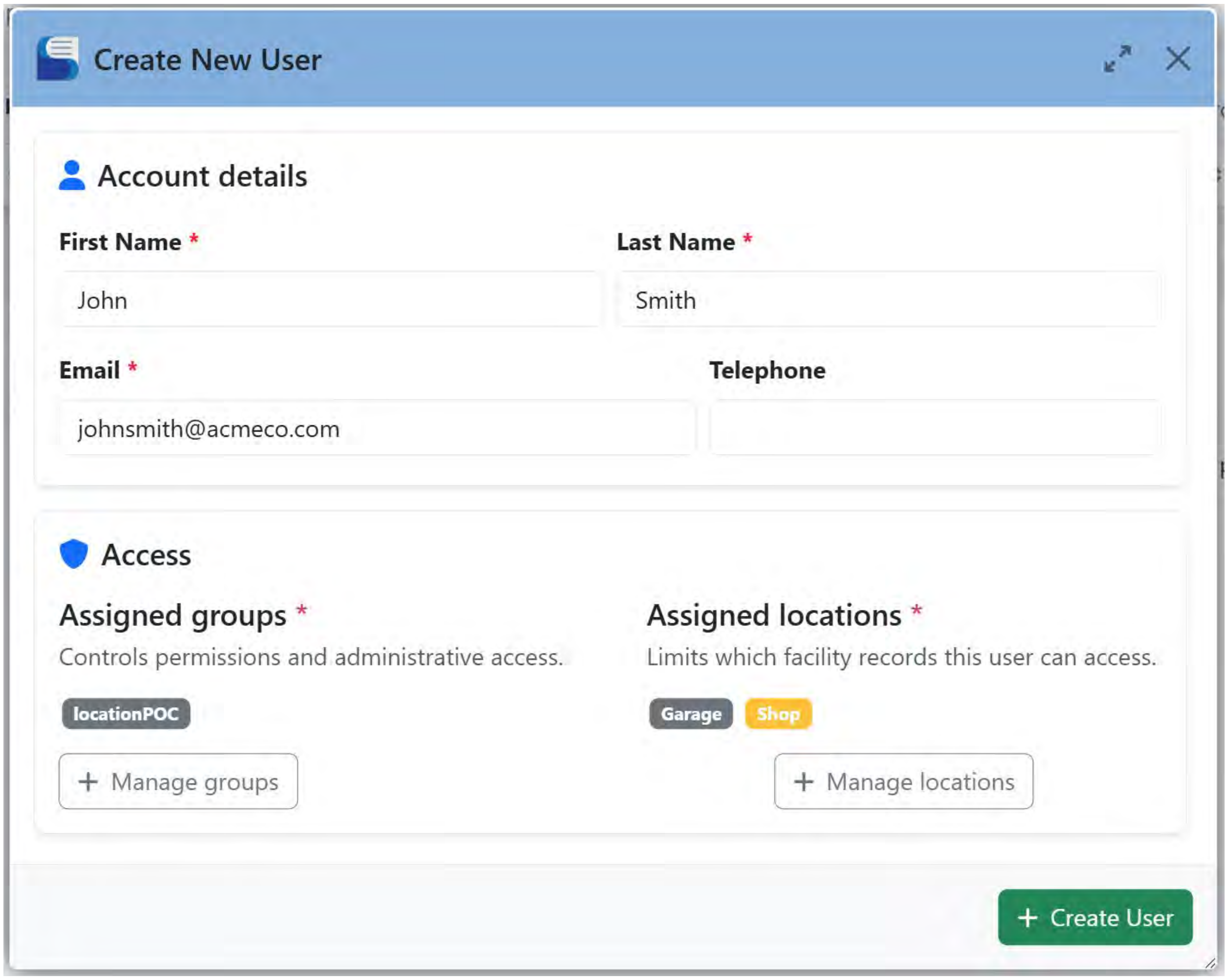
Group Name	Description	Permissions	Actions
Super Admin	Admin with global configuration and billing permissions	globalConfig billingInfo addChemicals adminArea assignLocations deleteChemicals editGroups editLocations editMetaData editUsers createUser smartTagEditor translate viewLogs	
Admin	Normal administrator with access to everything except global settings and billing information	editGroups assignLocations editMetaData addChemicals editLocations viewLogs deleteUsers editUsers createUser adminArea deleteChemicals translate smartTagEditor	
locationPOC	Restricted Admin assigned to 1 or more locations	adminArea editMetaData restrictAssignLoc restrictEditLoc addChemicals	

The Groups panel allows you to view, edit, and delete administrative groups. The default groups and settings work well for most organizations.

Super Admin – This provides the administrator with all available options and permissions.

Admin – This provides the administrator with access to all options with the exception of the **Global Configuration** and **Billing Information**

Location POC – This provides the administrator with most administrative options, but restricts the user to editing and assigning safety data sheets to selected locations only.

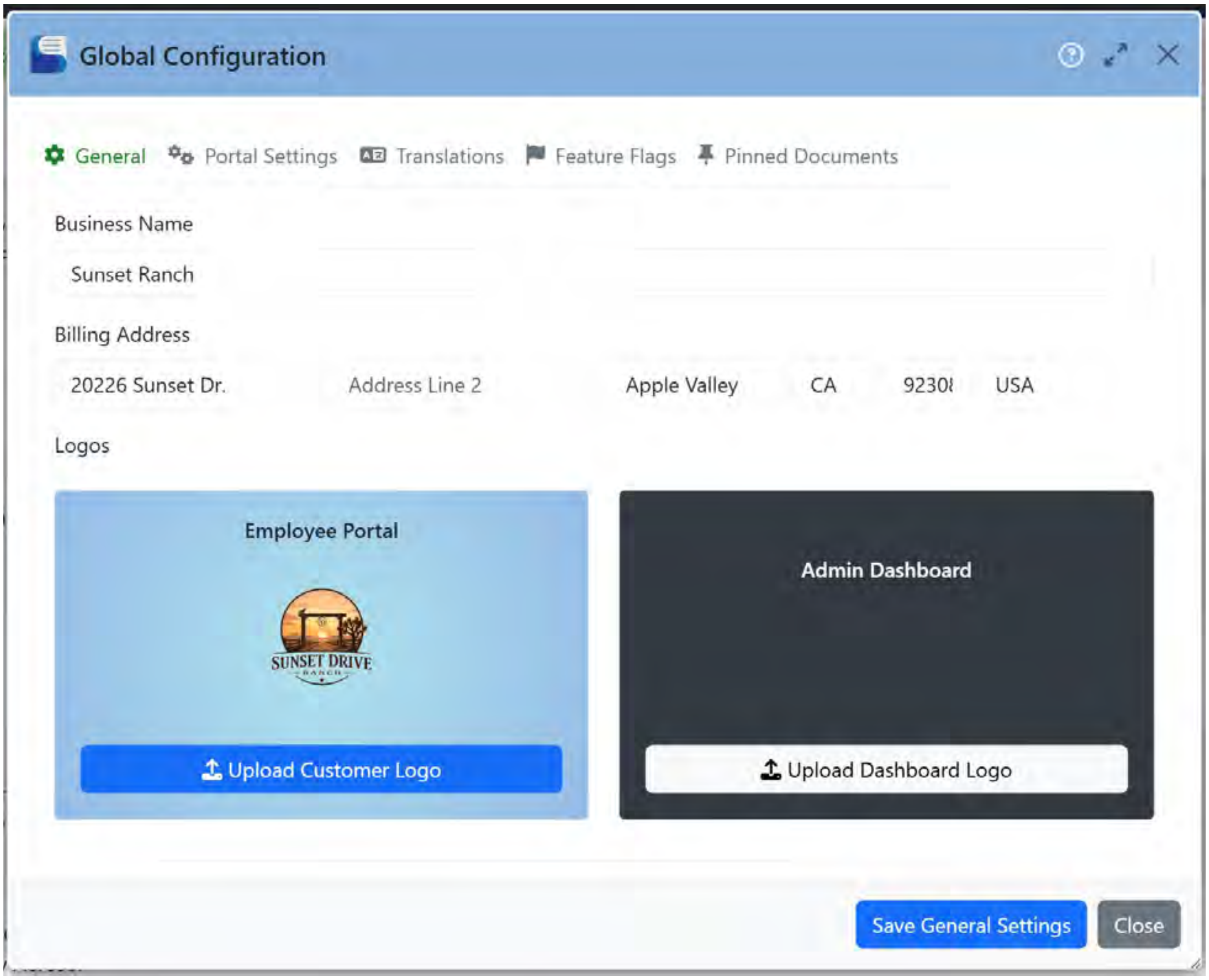


The Create New User window allows you to create a new administrator and select the appropriate group and locations as needed.

GLOBAL CONFIGURATION

The Global Configuration window allows Super Admins the ability to make changes to the account. Global Configuration is broken into five panels.

GENERAL

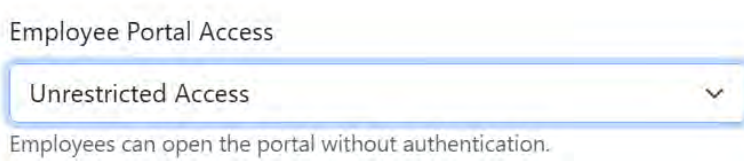


The **General** panel provides the Super Administrator the ability to update the business name, address, and logo.

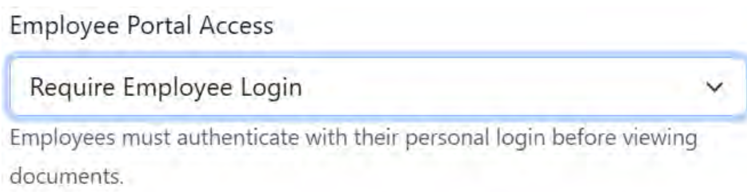
PORTAL SETTINGS

The Portal Settings panel provides you the ability to configure **Access Control**, the **Employee Request Form,** and the **Employee Label Maker Defaults.**

The employee portal is normally available on all devices for all networks, but can be locked down using the following Access Control modes.

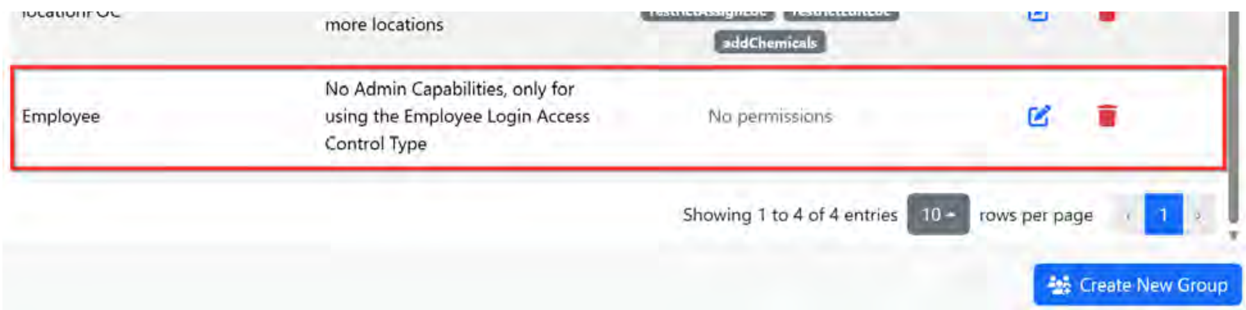


Unrestricted Access – This is the default setting allowing free and open access to your employee portal



Require Employee Login – This setting requires you to create and set up user accounts for all employees. This is the strictest control available, and will require you to create a custom **User Group** with no permissions. This method of access control pairs well with our single sign-on options available to our AP Autopilot customers.

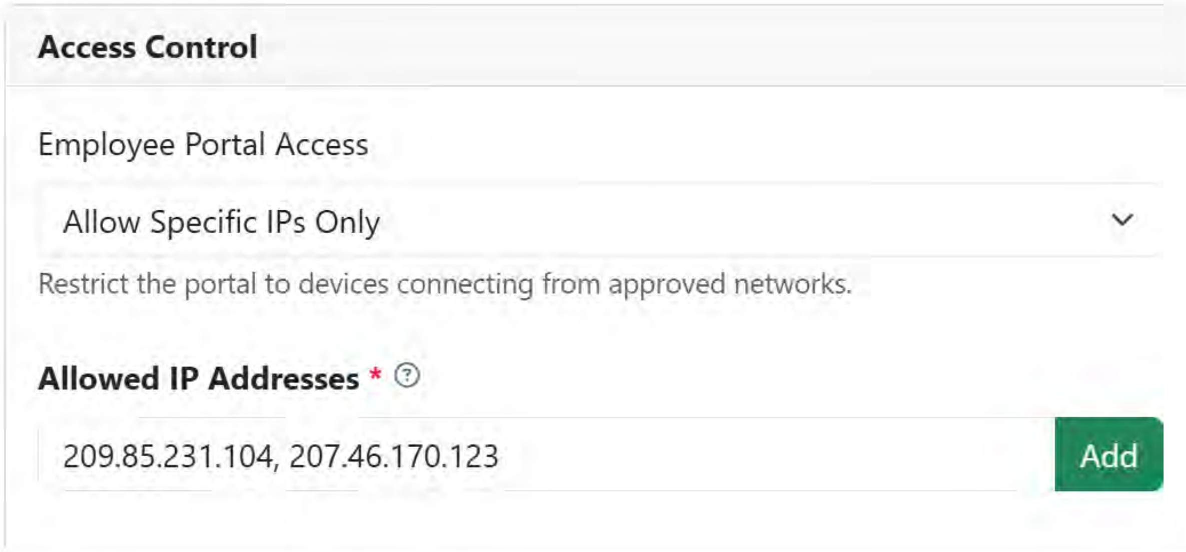
Create a group as shown below. The name and description do not matter, just ensure that no permissions are assigned.



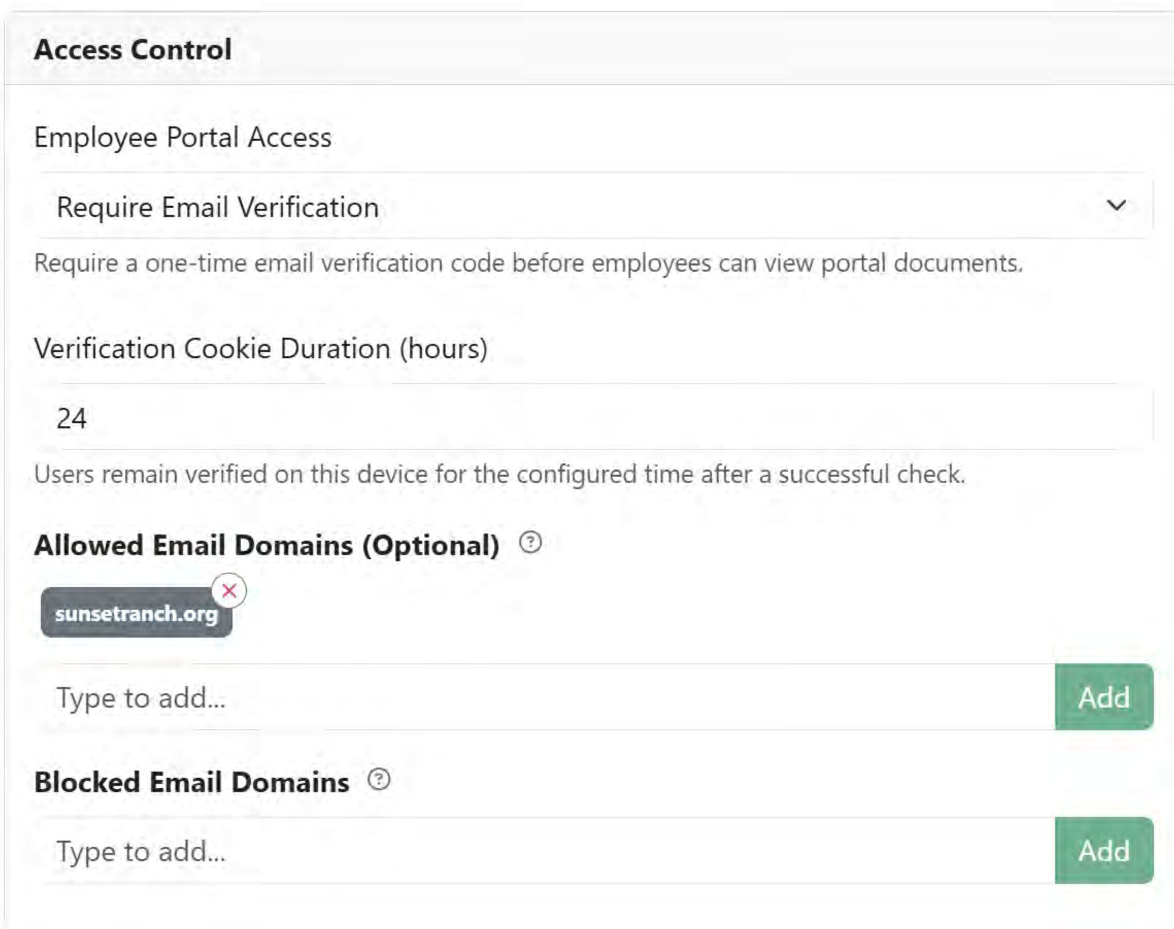
Create user accounts and assign your employees the custom group. This will provide them with the required access to use the employee portal.

Allow Specific IPs Only

This access control method allows you to create an inbound IP whitelist for the employee portal.



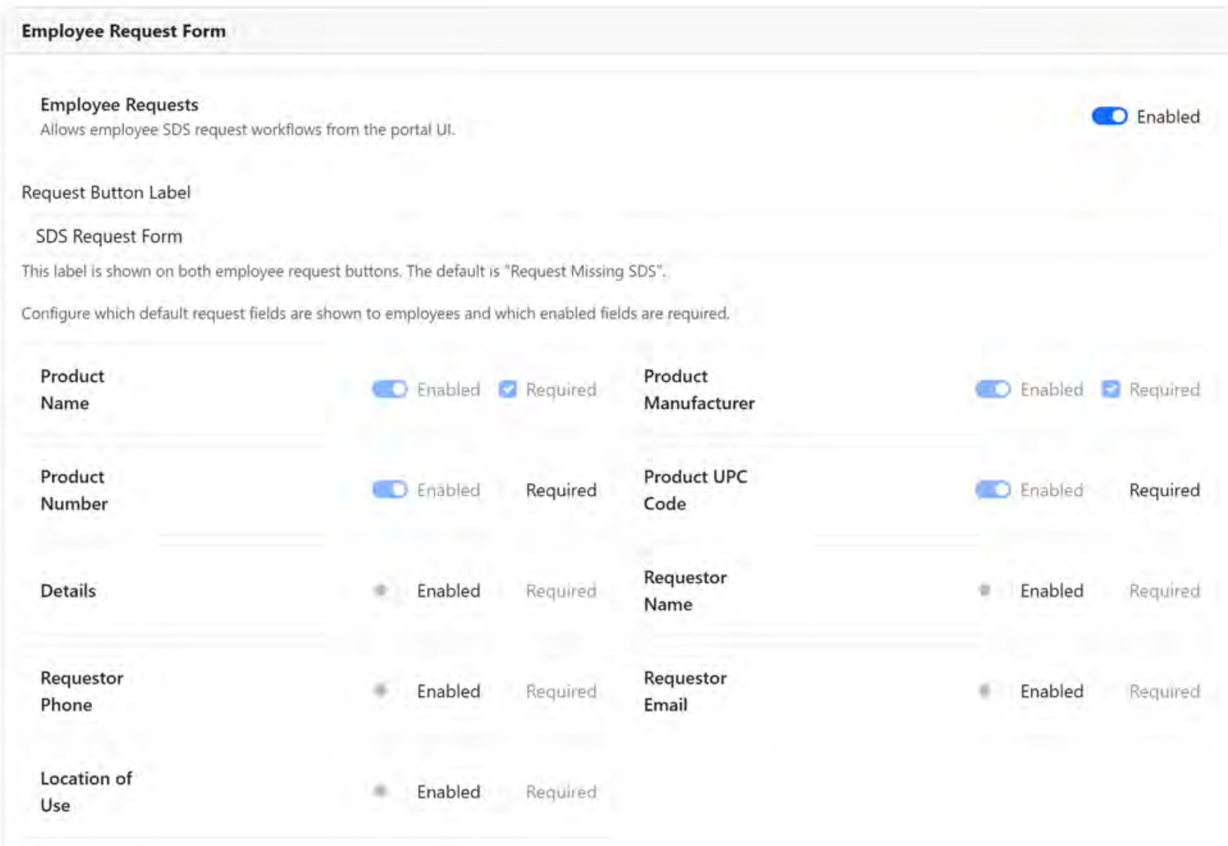
Require Email Verification – This access control method requires all visitors to the employee portal to first verify a security code sent via email.



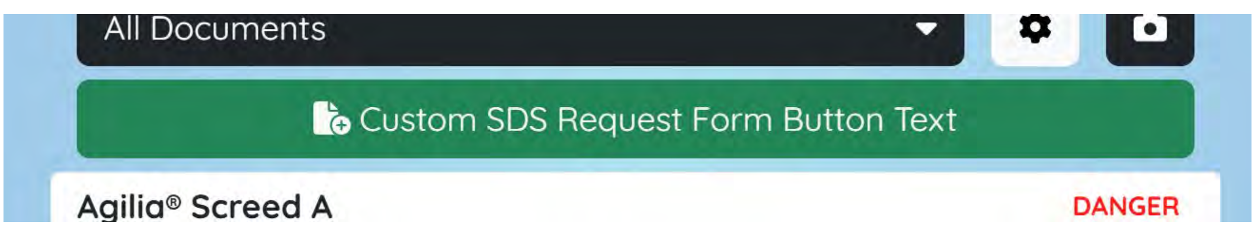
Use the Allowed Email Domains setting to restrict those emails, so security codes are only sent to certain domains.

EMPLOYEE REQUEST FORM

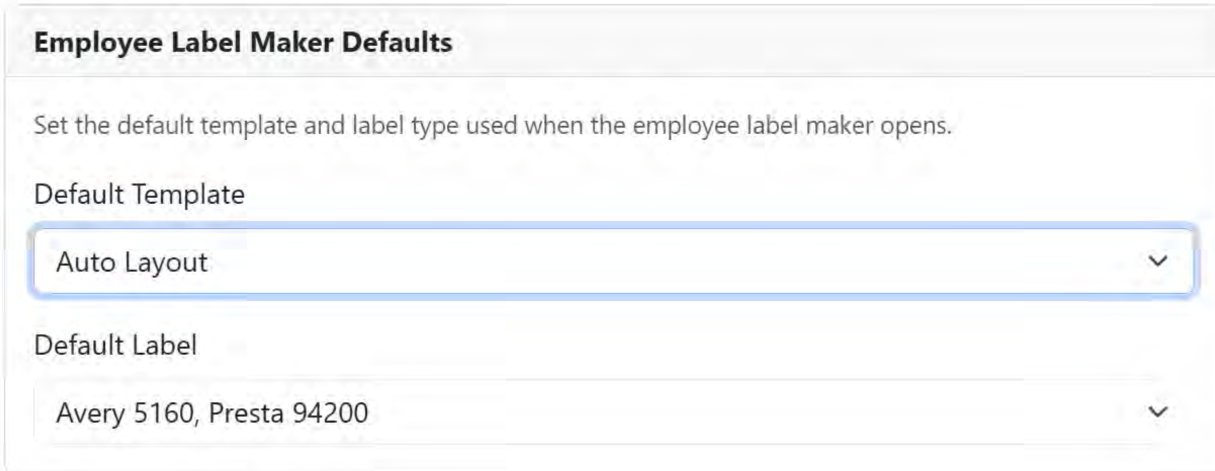
The Employee Request Form controls allow you to configure the “Request Missing SDS” displayed to employees in the employee portal.



You can toggle the request form on or off, edit the label of the button, and determine what elements of the form will be displayed and required.



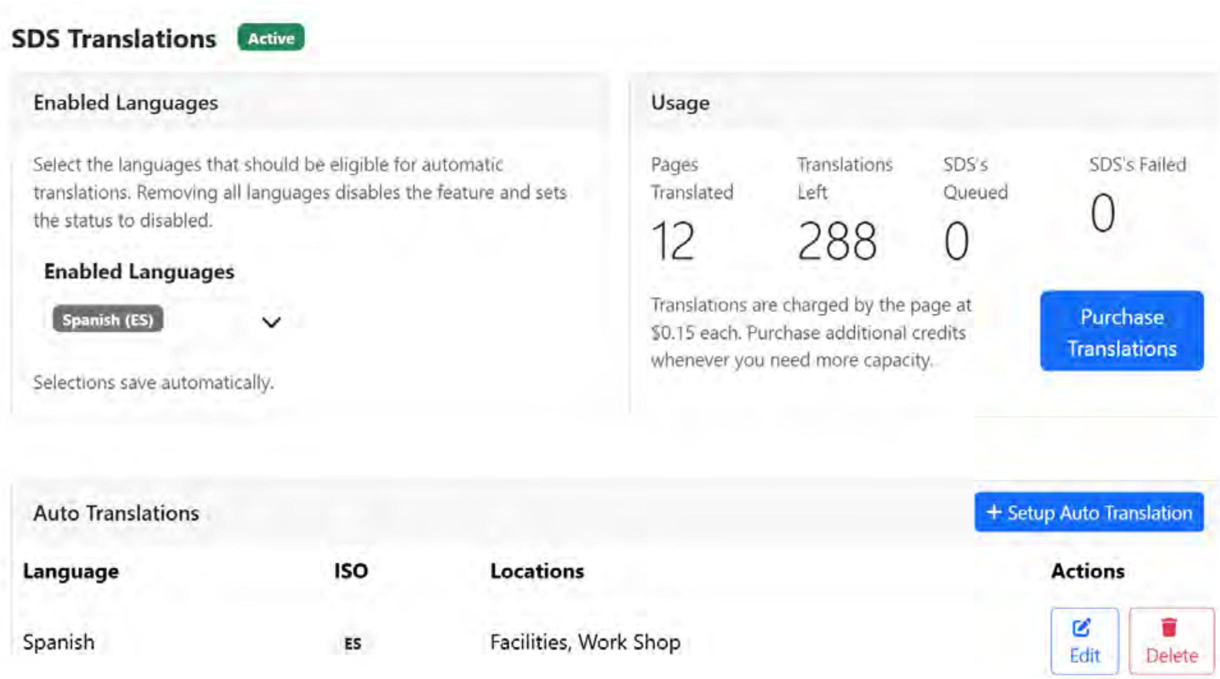
EMPLOYEE LABEL MAKER DEFAULT



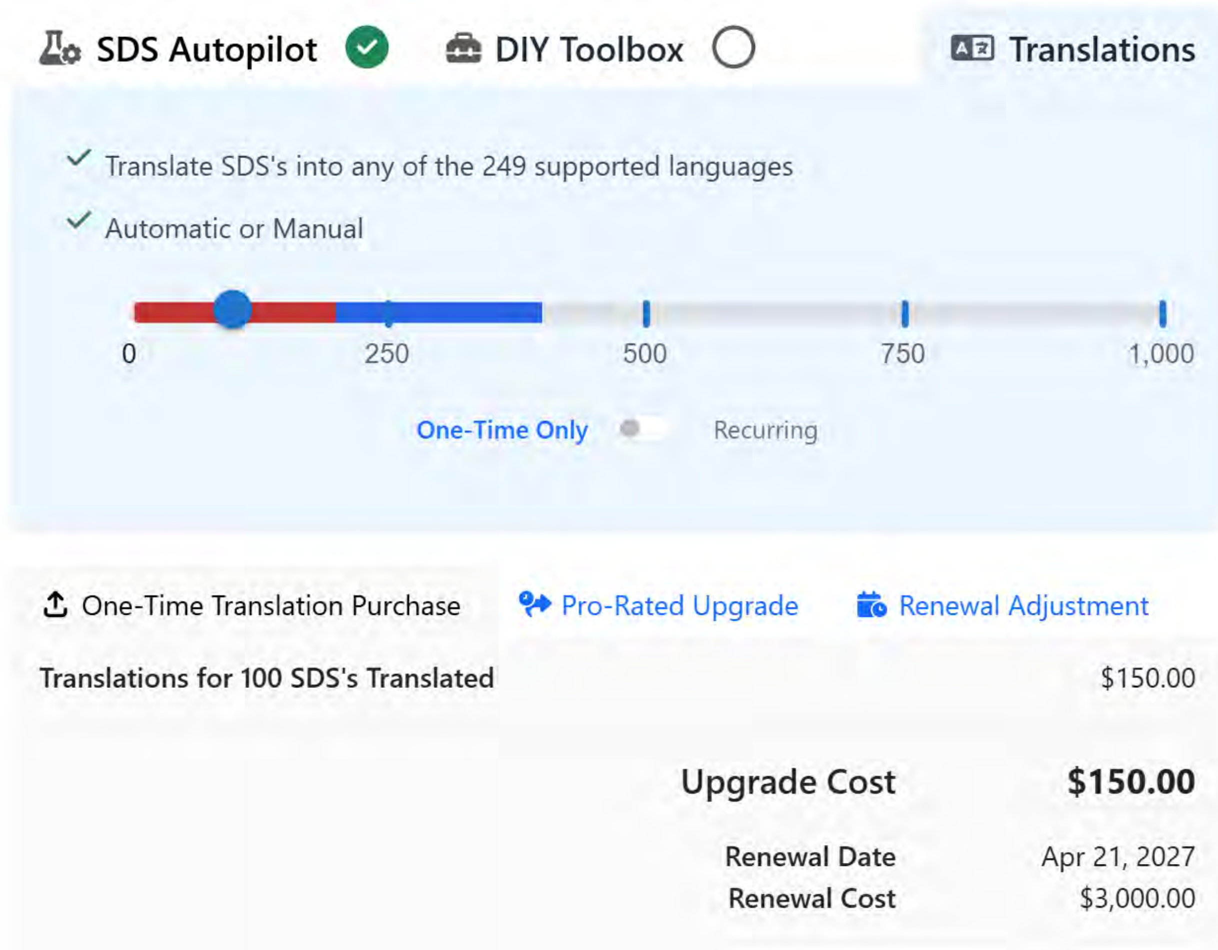
These options allow you to set the default selection for the secondary container label maker.

SDS TRANSLATIONS

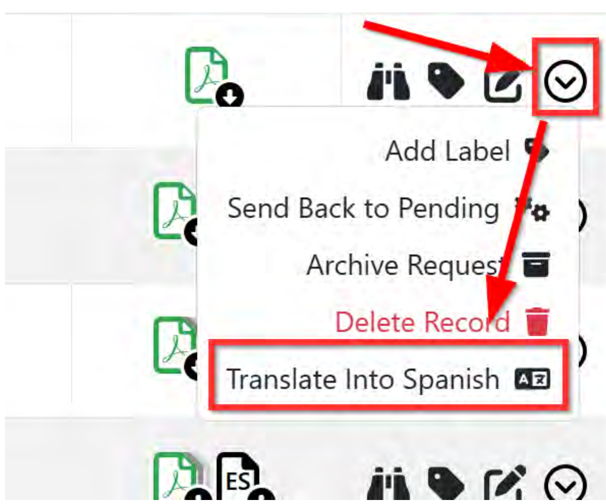
The SDS Translations panel allows you to enable, and configure the translation of your library into over 249 different languages.



Before you can begin translating documents, you will need to purchase SDS translation credits. Use the **Purchase Translations** button to open the Upgrade Plans window, and determine and select how many translations you need.



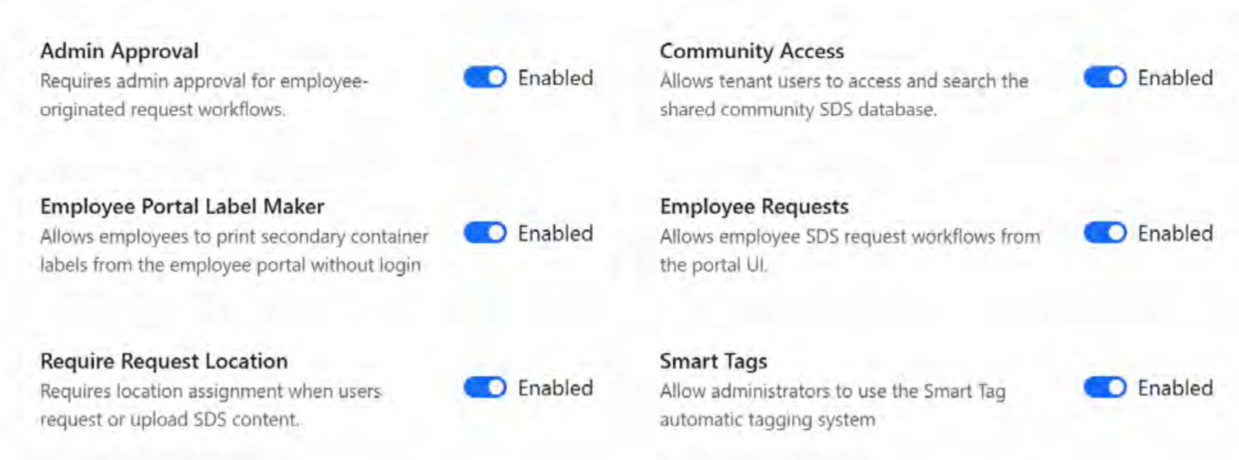
Once translations have been purchased, you can enable the languages available in the **Enabled Languages drop-down. Enabling languages allows administrators with** the **translation permission the ability to manually translate any SDS in your library.**



Set up an Auto Translation to automatically translate any SDS assigned to one or more of your selected locations.

FEATURE FLAGS

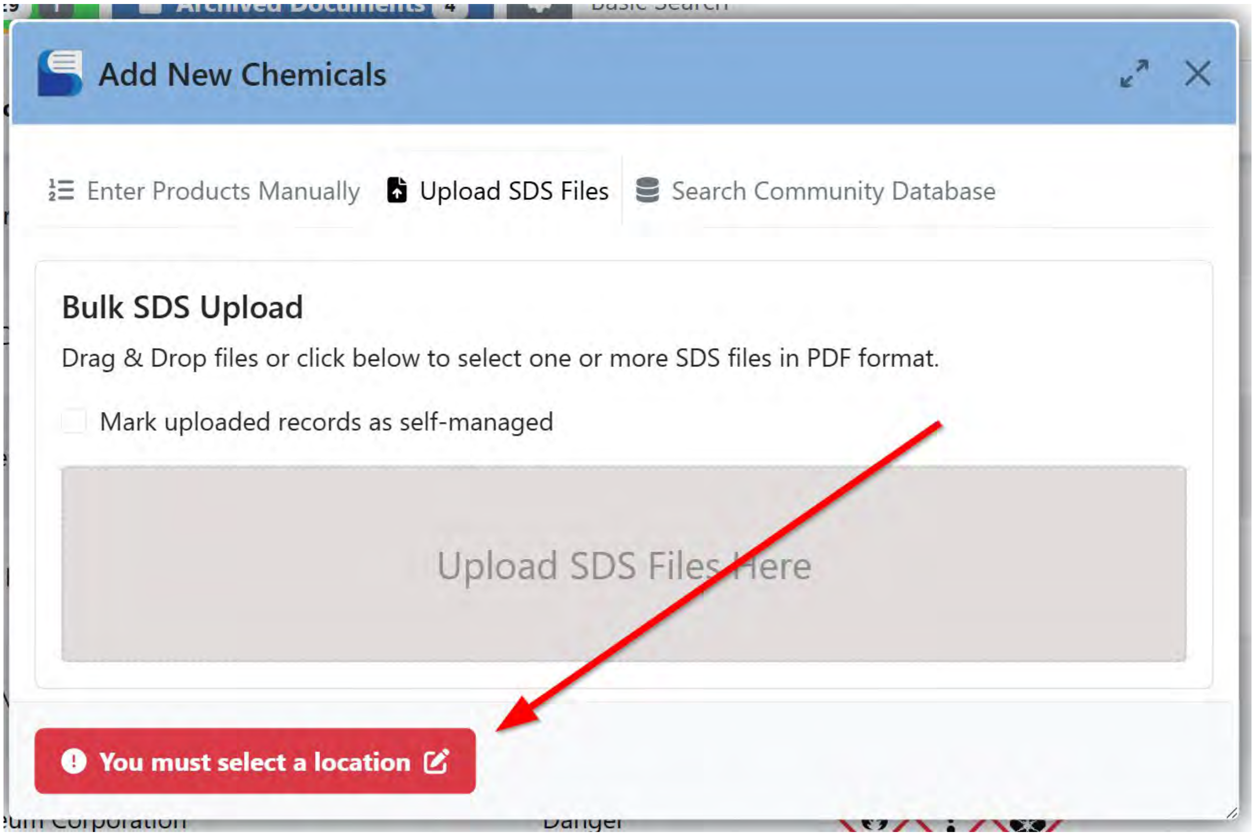
The feature flags panel shows you a list of features you can enable or disable.



Admin Approval – AP Toggle this off if you want any SDS request sent directly to the Data Sheet Solutions fulfillment team, rather than sending it to the **Pending Your Review** list.

Employee Portal Label Maker – Toggles the "Create Label" icon in the employee portal.

Require Request Locations – Forces employees and administrators to select one or more locations when adding a chemical.



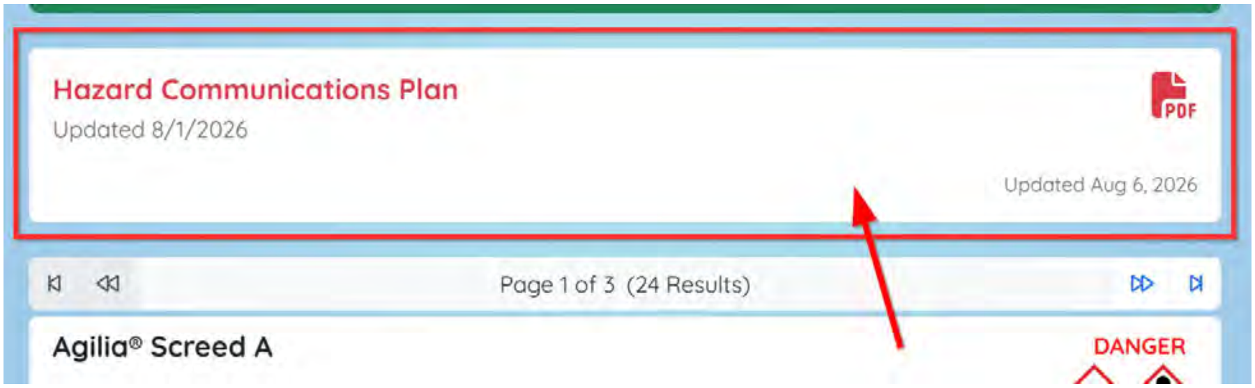
Community Access – Allows your administrators to search and pull documents from the **Community Library**. **Important! – Enabling this setting anonymously adds any safety data sheets you upload to the crowdsourced community library.**

Employee Requests – Toggles the Employee Missing SDS Request form on and off.

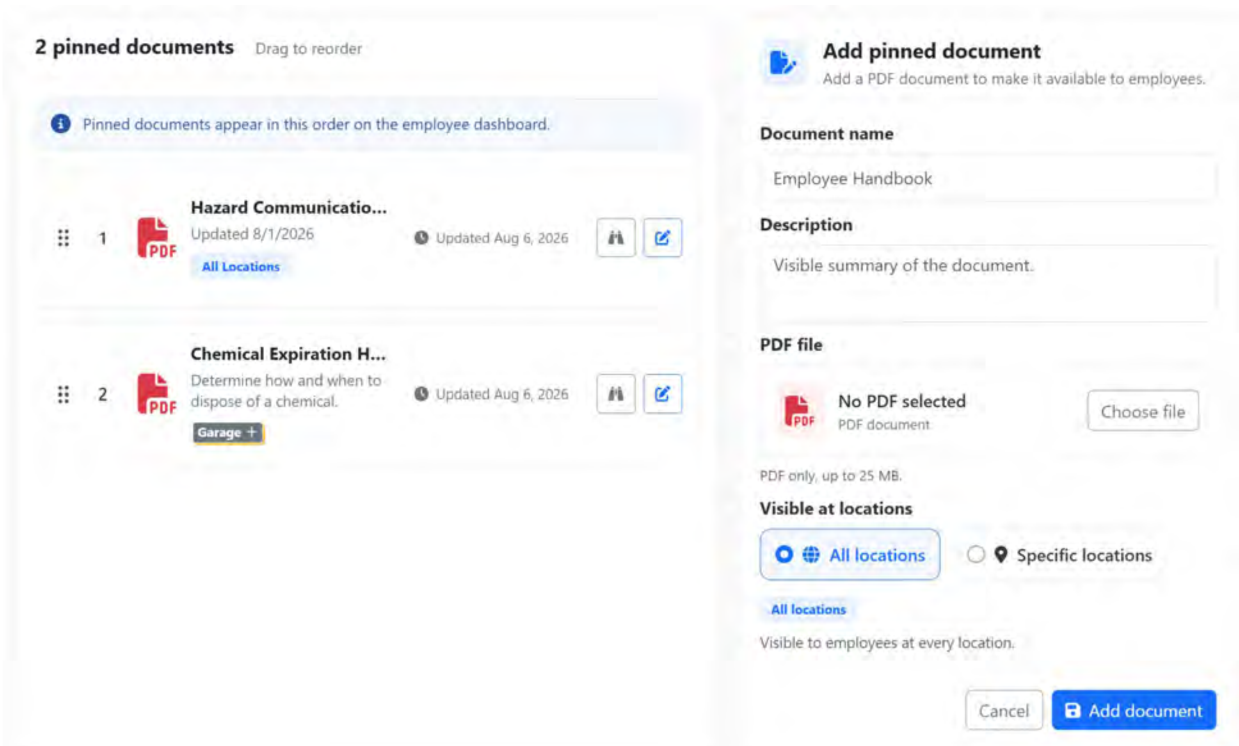
Smart Tags – Toggles the Smart Tags feature on and off.

PINNED DOCUMENTS

The Pinned Documents panel provides administrators with the ability to pin non-SDS PDF documents to the top of the portal.

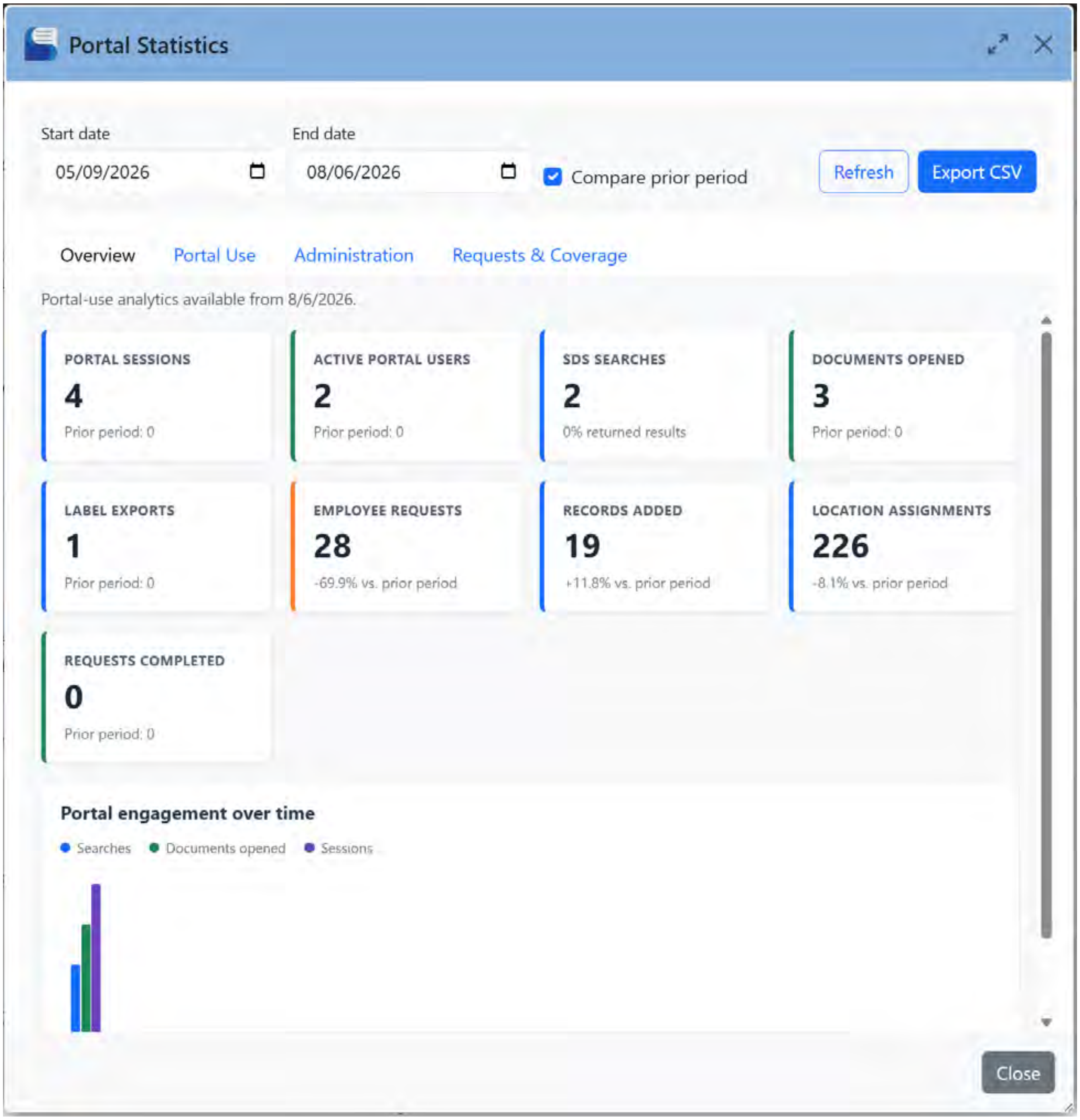


Pinned documents can be shown for **All Locations,** or for **Specific Locations** only.



PORTAL STATISTICS

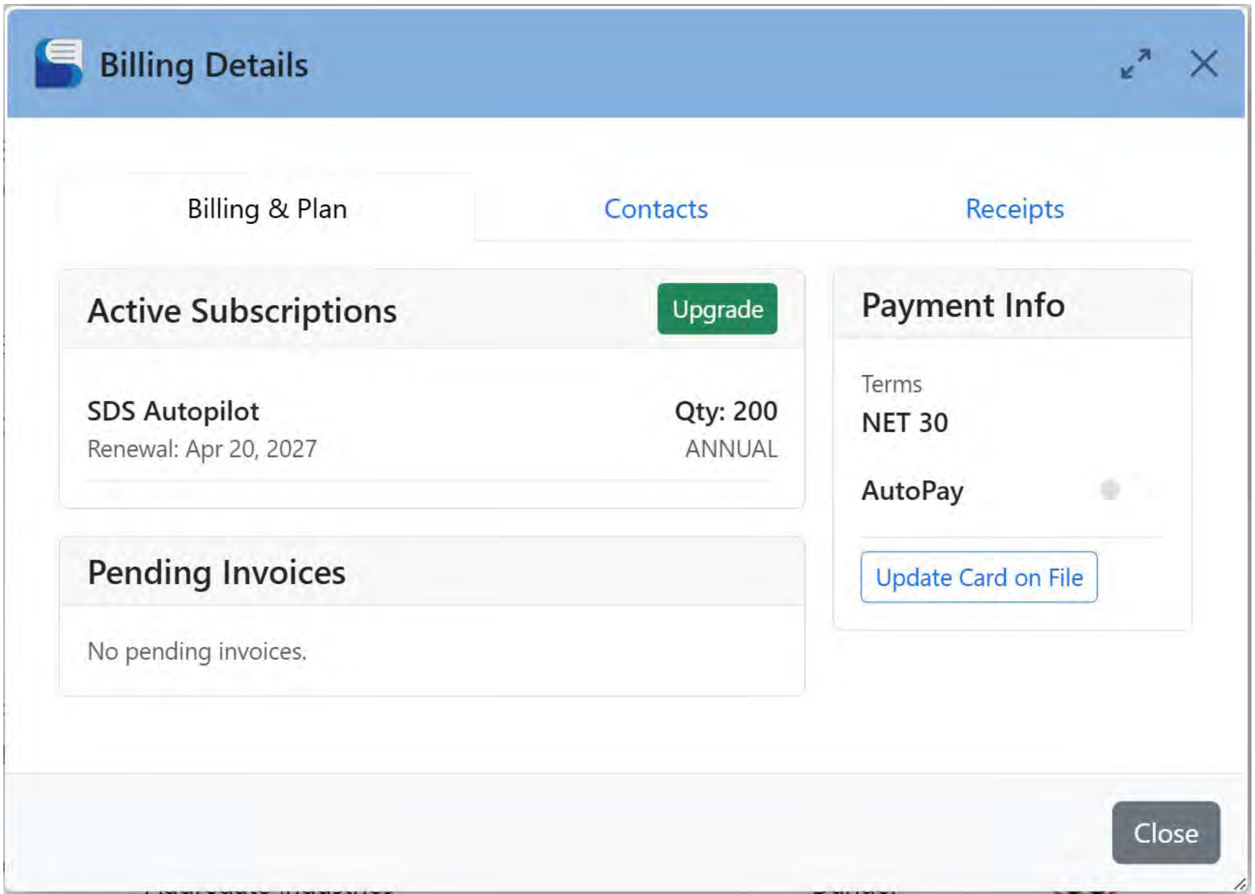
The portal statistics window provides administrators with insight on the use of the employee portal and administrative dashboard.



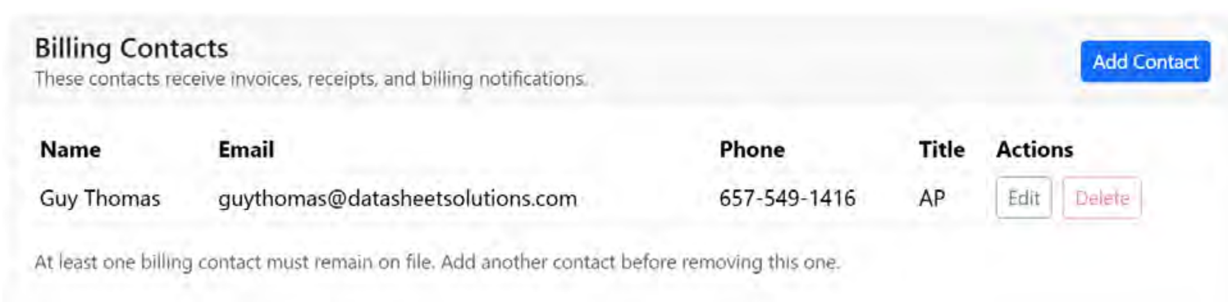
Explore the tabs to learn about how and when your SDS portal is being used.

BILLING DETAILS

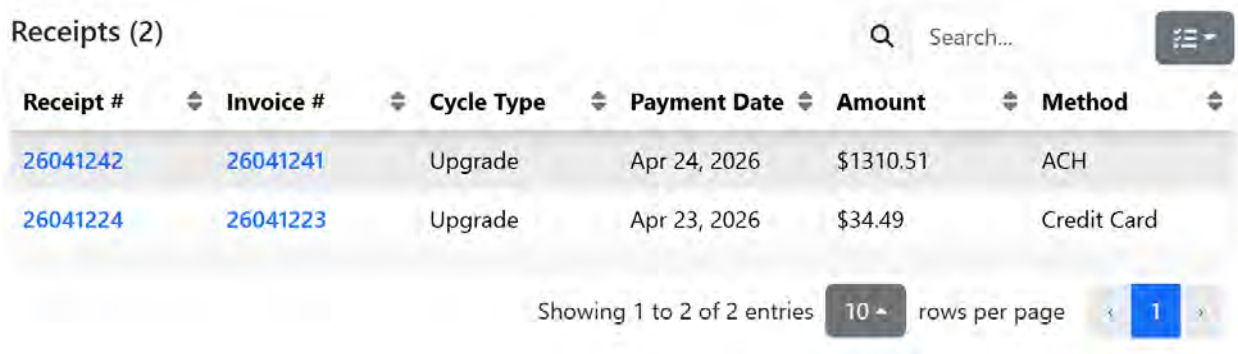
Super Administrators have access to the Billing Details with the default settings. The Billing Details window is broken into 3 panels.



The **Billing & Plan** tab shows your current subscription, renewal date, payment terms, autopay settings, and Pending Invoices. Click the **Upgrade** button to change your current plan.



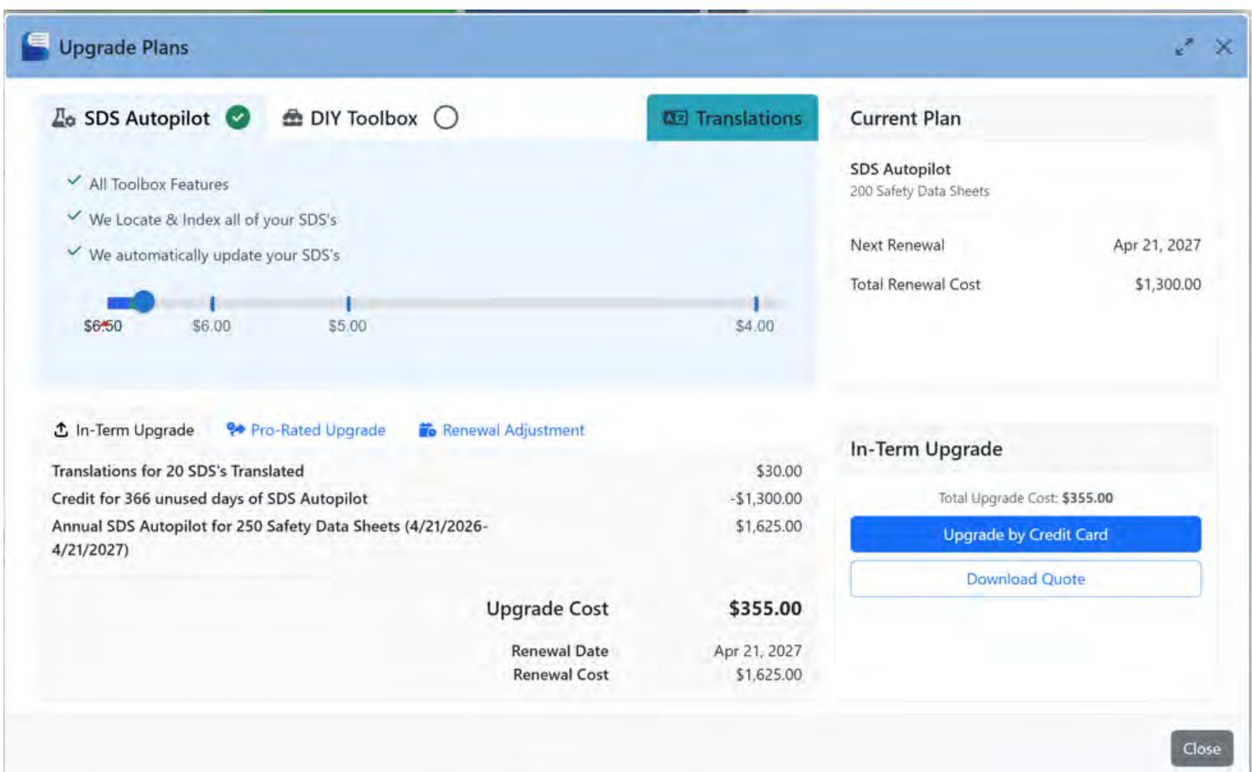
The **Contacts** panel allows you to view and edit the list of contacts who will receive billing-related emails, which include invoices, receipts, and payment reminders.



The **Receipts** panel is where you can view and download invoices and receipts.

UPGRADE PLANS

The Upgrade Plans window allows you to modify your subscription.



The top of the window allows you to toggle between **SDS Autopilot**, **DIY Toolbox**, and the SDS **Translation** feature.

Drag the **Quantity** slider to see how you can increase the maximum number of chemicals available under your plan. The price change will be shown with three options.

In-Term Upgrade – The In-Term Upgrade leaves your subscription dates as is, you simply pay the difference between your existing plan and your new plan.

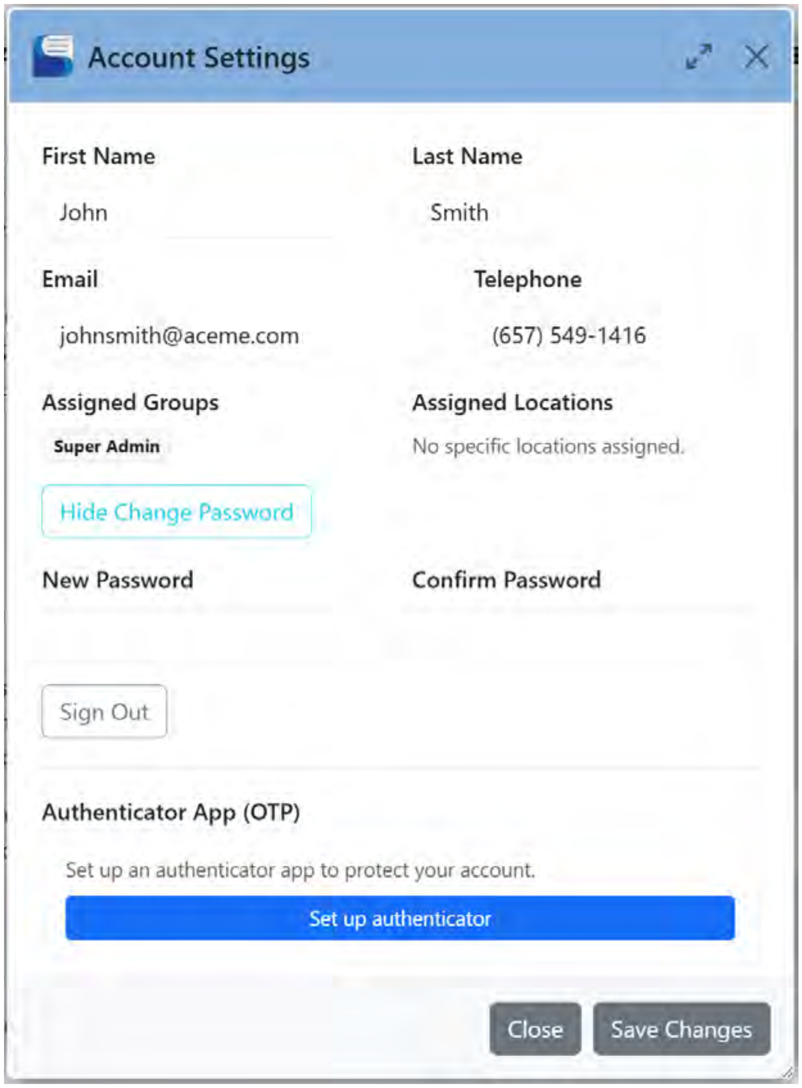
Pro-Rated Upgrade – The Pro-Rated Upgrade option allows you to begin an entirely new year of service, offset by a credit calculated from the remaining time on your current subscription period.

Renewal Adjustment – The Renewal Adjustment option allows you to make a change to your next renewal.

ACCOUNT SETTINGS

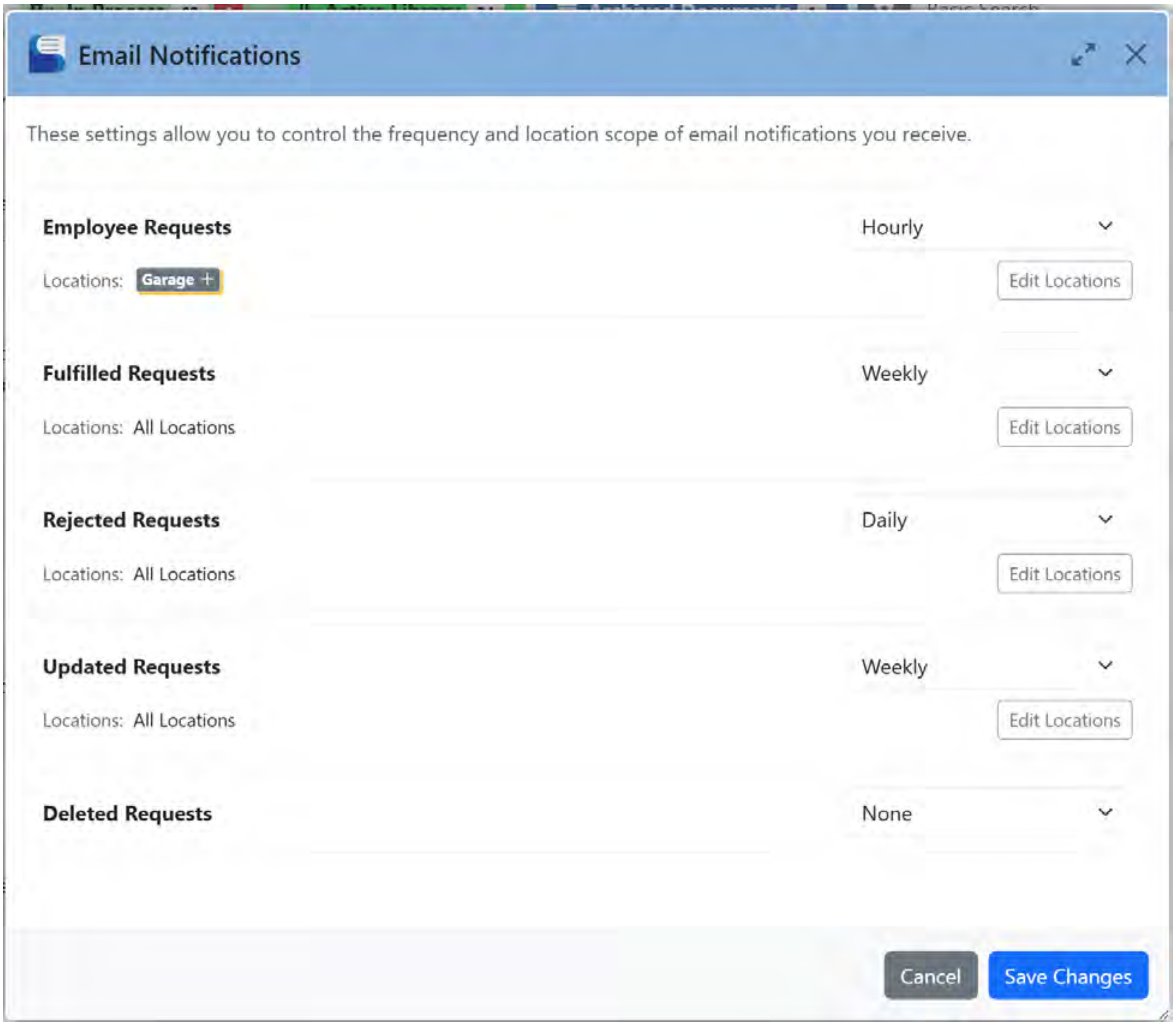
The Account Settings window is available to all administrators, allowing for the modification of your name or email address. Use the **Show Change Password** button to update your password.

If you would like to setup an **OTP Authenticator App** for extra security, use the **Setup Authenticator button.**



EMAIL NOTIFICATIONS

The Email Notifications window allows each administrator to set up email notifications in response to various events within the portal.



Employee Requests – Get a notification if an employee requests a new SDS

Fulfilled Requests - Get a notification when a new record is moved to the **Active Library**

Rejected Requests AP – Get a notification when an **In Process** request has been rejected by the Data Sheet Solutions fulfillment team.

Updated Requests AP – Get a notification when the fulfillment team updates one of your active records with a new version.

Deleted Requests – Get a notification when an administrator deletes a record.

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