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# SISOT MODULE

Version 3.4


# SISOT



Chemwatch

2025

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# 1.0 Introduction to Sisot Module

HOME | SISOT | MODULE ELEMENTS

This topic will cover the following objectives;

- Overview of the Sisot Module user interface components and features
- Getting-started with Sisot
- Adding new container (Registered/Unregistered)
- Adding new container (non-Chemical)
- Adding container to an existing vendor
- Adding attachment documents to containers
- The transfer processes
- Shopping story for requests, allocation, ordering and transfers
- Receipts' mode
- Stocktake and Reconciliation
- Waste story for transacting waste type of containers
- Sisot settings for the administrative functions



## Chemical Containers and Barcoding

Sisot is a convenient tool for inventory management. Sisot uses a barcode Scan in Scan out Technology for inventory and asset management. Individual chemical containers can be easily tracked throughout your organisation. The Sisot module covers:

- Inventory management
- Transfers of chemical and/or non-chemical assets with full audit trail
- Receiving workflows
- Incompatibility checks on container transfers
- Container Statuses (surplus, waste, trash, disposal)
- Store management
- Use of “unique” barcodes
- Rule-based barcode generator
- Barcode label template generator
- Support for pre-printed labels
- Action Barcodes (Automation of actions using “barcodes” instead of “clicks”)
- Advanced forms to capture intrinsic details about containers
- Stocktake and Reconciliation

## Chemical Purchasing Integration

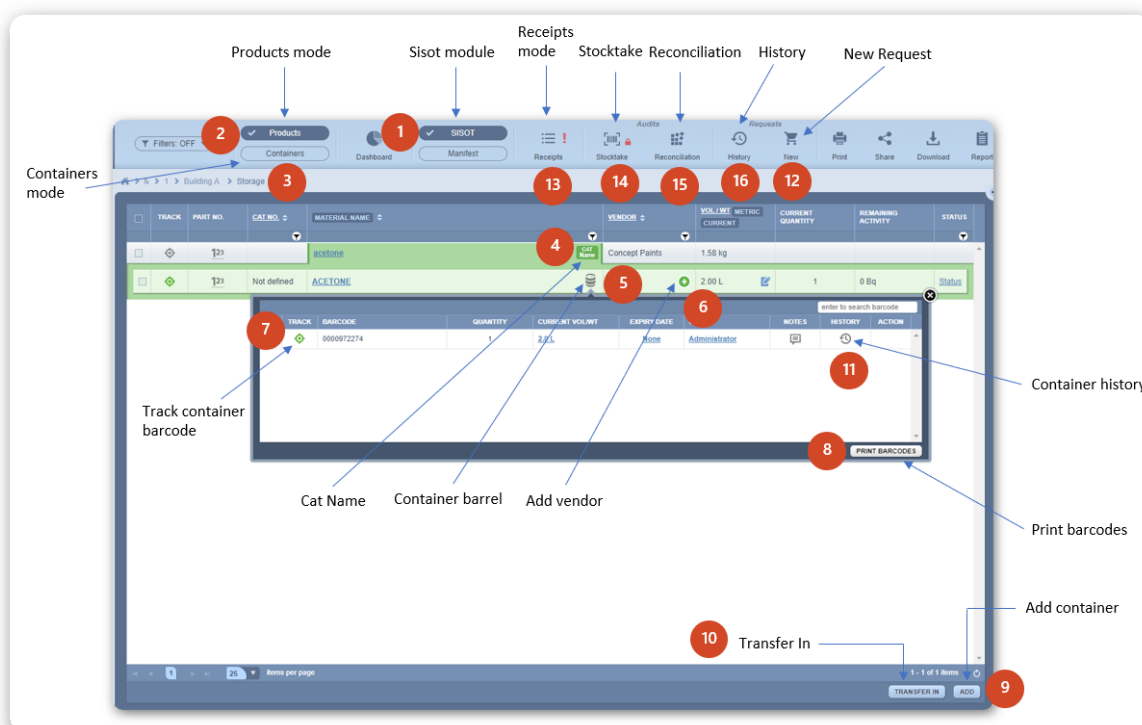
Sisot allows for the request of assets such as chemicals and integration with your internal purchasing processes. In this instance, Sisot can work through an API integration to allow users to request to purchase an asset from within your organisation and have the request approved by the appropriate personnel, and then track the asset on site upon its receipt.



## Shopping Story



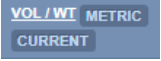
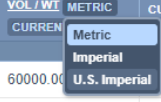
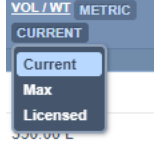

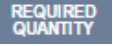








- Use and view your shopping cart
- Pre-shopping screen
- Shopping requests-- order from internal warehouse or external supplier
- Save your shopping cart mid-request
- Request workflow -- approval granted by appropriate personnel
- Use of Cost-codes
- Requester cannot approve own request
- View request progress
- View receipts
- Can elect to receive full or partial orders
- User can set store/warehouses that has large quantities of chemical stock


### 1.1 Sisot Features and User Interface Elements



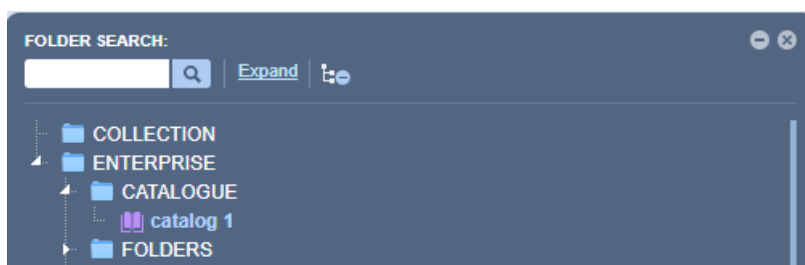
Feature	Element	Functionality Description
	Sisot mode	SISOT icon (barcode image) activates the Sisot module in order to view inventory related data, add containers, send requests, transfer items, check receipts in/out/history, stocktake and reconcile stock.
	Products mode	Enables users to view content in products grid (material/cat names).
	Containers mode	Enables users to view content containers grid (with barcoding and container information).

Feature	Element	Functionality Description
	Receipts	Receipts function manages sending and receiving items in a folder/location and can also be used to transfer containers between different storage folders/locations or receiving requests.
	Stocktake	Conduct stocktake and generate stocktake report for your current inventory for a storage folder/location.
	Stocktake Lock/Unlock	When lock is open (green) – stocktake in progress. When lock is closed (red) – stocktake cannot be conducted.
	Reconciliation	Provides analysis of the containers status to reconcile.
	New Requests	The request mode will be shown differently based on user permission. Requester will see own requests that were submitted, and the approver will see the requests which are required to be approved.
	Checkbox on grid header	Checkbox is used for selection of all materials listed in a folder/location.
	Material (s) Checkbox	Checkbox is used for selection of single or many materials in a folder/location.
	Track registered materials	The track icon is used for tracking/pin pointing the location of the material in any folder within the entire tree structure. It identifies the specific folder where the material/product exists.
	Green track	Product container(s) is in the current folder.
	Red track	Product container(s) is not located in current folder.
	Yellow track	Product container(s) is in both current and subsidiary folders.
	Part No./Cat No.	In Sisot mode view, Part No. for materials row shows all available part numbers for the materials whereas Part No. in sub-grid displays the part number barcode tables for the containers.
	Material Name	Lists the view by material names. Change the type of view mode by using the up/down arrows  . However, the sub-grid row will always show the catalogue name (product name).
	Preferred Name	
	Cat Name	Lists the container inventory by cat (catalog) names.
	Vendor	Lists the manufacturer/supplier of the material.
	Preferred Vendor	Lists the materials by preferred vendor (if preferred vendor is available or set by the admin user).
	Multiple	Displays the cat names by specific multiple vendors.


Feature	Element	Functionality Description
	Cat Name	The cat name button expands the material name to display an expanded row to show the respective cat name(s).
	Add Vendor	The add icon allows users to add new container information for the material.
	Vol/Wt	Volume or weight column header with the metric and current/maximum options.
	Metric	Volume units drop down arrow shows unit measure to apply. <a href="#">Metric</a> – International standard of measure with its base units known as meter, kilogram, second, ampere, kelvin, candela and mole. <a href="#">Imperial</a> – Imperial units (old English unit measure system). <a href="#">U.S.</a> – Custom unit measure for the United States.
	Current Maximum Licensed	Note that this view will be applicable to material row. <a href="#">Current Volume/Weight</a> <a href="#">Maximum Volume/Weight</a> <a href="#">Licensed Volume/Weight</a>
	Current Quantity	Current quantity of containers.
	Required Quantity	Required container quantity for transfer or shopping.
	Allow Partial Delivery	Partial delivery checkbox enables delivery of partial quantity number as opposed to total number of available containers.
	Action	Adds items into carts.
	Cart	Slide panel displays shopping information for all requests/transfers added through the “Add to Cart”  .
	Add to Cart	Use the add to cart button to add containers into the cart
	Receipts Exclamation mark	Destination folder displays receipts that are pending with an exclamation mark icon  .
	Add New Container	Add a new container into current folder/location. This button will open the container wizard.
	Edit Volume/Weight	Edit volume or weight of the material. To edit volume/weight of a product container, go to the Add Container Wizard.
	Container barrel	This button allows users to view container barcode information.











Feature	Element	Functionality Description
	Waste Report Cart	This button enables users to view added waste items in the cart and submit the waste for disposal.

Sisot contains a Catalogue folder to enable users to create their own catalogue based on an existing inventory. Users who are privileged to add/edit their own catalogue items can set the price for their own catalogued items.



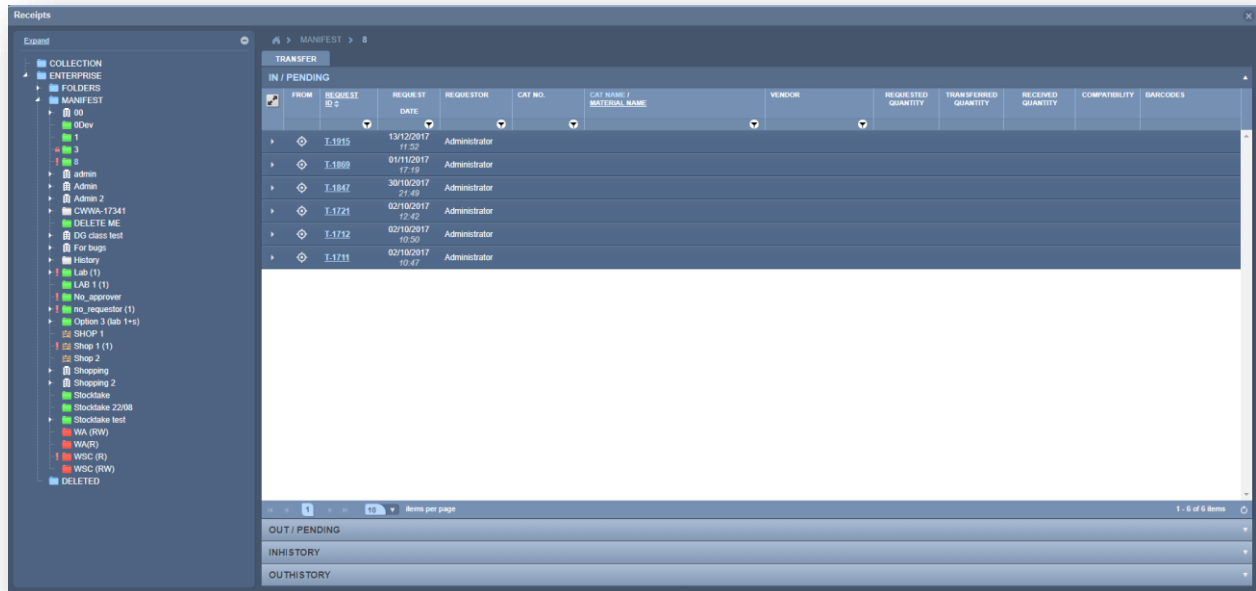
The catalogue contains the following main columns' fields.

- Catalogue Name/Material Name
- Catalogue Number (Cat No.)
- Vendor (Manufacturer/Supplier)
- Volume/Weight (Container  Size)
- Price (Currency)
- Tags (optional)

<input type="checkbox"/>	CAT NO.	MATERIAL NAME	Columns	Part No / Cat No	TAGS	VOL / WT	METRIC	PRICE (HKD)
<input type="checkbox"/>		"C" CEMENT		<input checked="" type="checkbox"/> Material Name	PKG II new tag			
<input type="checkbox"/>		((2K) Reducer FX-Slow		<input checked="" type="checkbox"/> Vendor	PKG II			
<input type="checkbox"/>		(+)-3-bromocamphor-10-sulfonic acid		<input checked="" type="checkbox"/> Tags	hello PKG II			
<input type="checkbox"/>		(+)-monoisopropanolamine		<input checked="" type="checkbox"/> Vol / Wt	DGC 6			
<input type="checkbox"/>		(+)-N-3-benzylirvanol		<input checked="" type="checkbox"/> Price	hello PKG III			
<input type="checkbox"/>		AL Wilson InkGo			DGC 6			
<input type="checkbox"/>		Banana			PKG III			
<input type="checkbox"/>		CEMENT-X						
<input type="checkbox"/>		CEMENT-X				85.239188 mL		200
<input type="checkbox"/>		CEMENT-X				85.239188 mL		200
<input type="checkbox"/>		CEMENT-X				85.239188 mL		200
<input type="checkbox"/>		COATING						
<input type="checkbox"/>		SLOW-BLOW FUSE, 1/16IN AMPAIR 250V, (EC-43-5R06)						

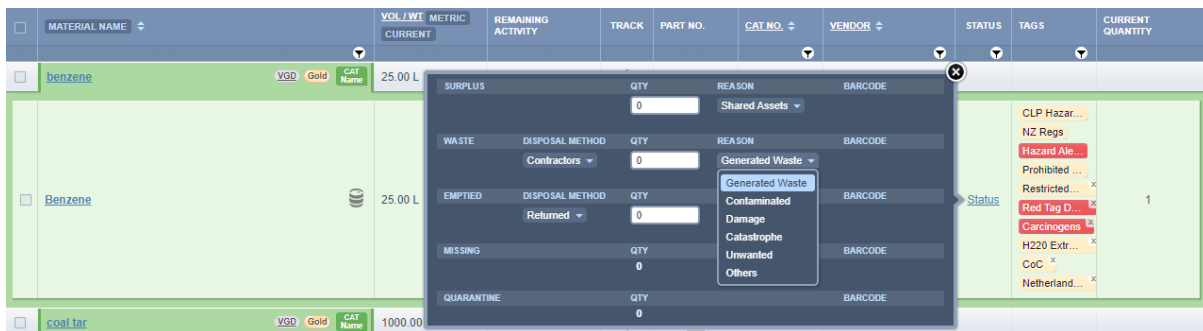
## Receiving Story: Receipts (In and Out)

The Receipt mode manages sending and receiving goods into a location. Receipt function can be used to transfer items between different storage locations or receiving requests from the warehouse/central stores.



## Container Status



Users can mark container  status during stocktake or whilst doing routine laboratory work.



Container statuses available in Sisot are:

- Surplus
- Waste
- Emptied
- Missing
- Quarantine

## Stores

Users can set up a Central Store/Warehouse(s) , which has large quantities of chemical stock. Requesters can request chemicals from the stores (Shop Folder). Store managers  can fulfil the requests by allocating existing stock or order insufficient items from vendors.

Receipts

Expand

COLLECTION

ENTERPRISE

FOLDERS

MANIFEST

00

0Dev

1

2

3

8

admin

Admin

Admin 2

CWWA-17341

DELETE ME

DG class test

For bugs

History

Lab (1)

Lab 1 (1)

No approver

no\_requestor (1)

Option 3 (lab 1+s)

SHOP 1

Shop 1 (1)

Shop 2

Shopping

Lab 1 (1+s)

Lab 2 (1+s)

Lab 3 (1+s)

Lab\_A

No\_shop 1 (1)

Shop 1


Shopping > Shop 1

TRANSFER SHOP

IN / PENDING

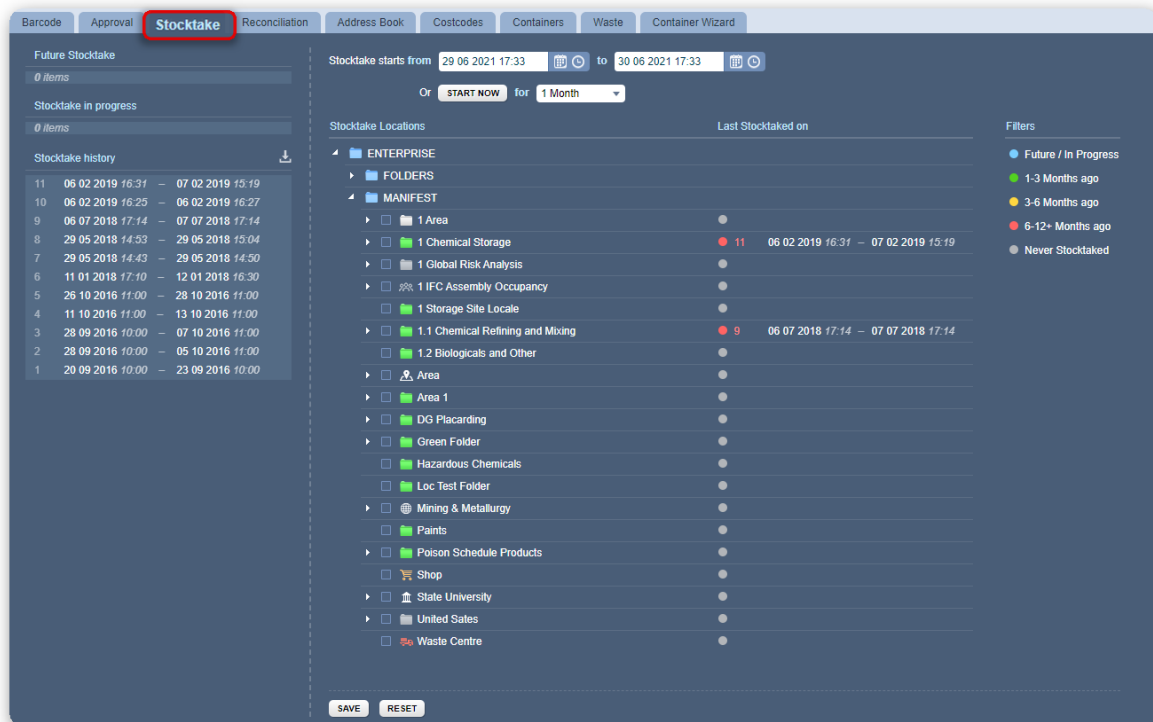
VENDORS / SUPPLIERS	ORDER NO.	CAT NO.	CAT NAME	VENDOR NAME	CONTAINER SIZE	TAGS	ORDERED QUANTITY	RECEIVED QUANTITY	RECEIVED DATE	BARCODES
General Machine Products	O-0070	111116	C CEMENT	General Machine Products	0mcg	PKG 8 new tag	4	2	02/11/2017	
Sigma-Aldrich (Merck)	O-0065	Unspecified	july	Sigma-Aldrich (Merck)	34mcg	hello PKG 8 DGC 8	1	0		
		Unspecified	july23	Sigma-Aldrich (Merck)	34mcg	hello PKG 8 DGC 8	1	1	31/10/2017	
		Unspecified	sisot	Sigma-Aldrich (Merck)	34mcg	hello PKG 8 DGC 8	1	0		
	O-0029-S	Unspecified	allocate_shop1	Sigma-Aldrich (Merck)	22lb	PKG 8	10	0		
Sisot	O-0027-S	1/11 test	hello	Tokyo Chemical Industry Co (TCI Europe)	0mcg	PKG 8 DGC 8	10	0		
		Unspecified	name	Santa Cruz Biotechnology	22mcg	PKG 8	10	0		

## New Containers and the Barcode Engine

Armed with a barcode scanner , action barcodes and asset/container barcodes; users can quickly and easily scan barcodes to update the Manifest. Users can also barcode assets using pre-printed barcodes or by using the automatic or manual barcode creation functionality within the system. After moving items into or around storage locations, you can also perform stocktake and reconciliation to identify and rectify any misplaced or missing items.

## Stocktake and Reconciliation

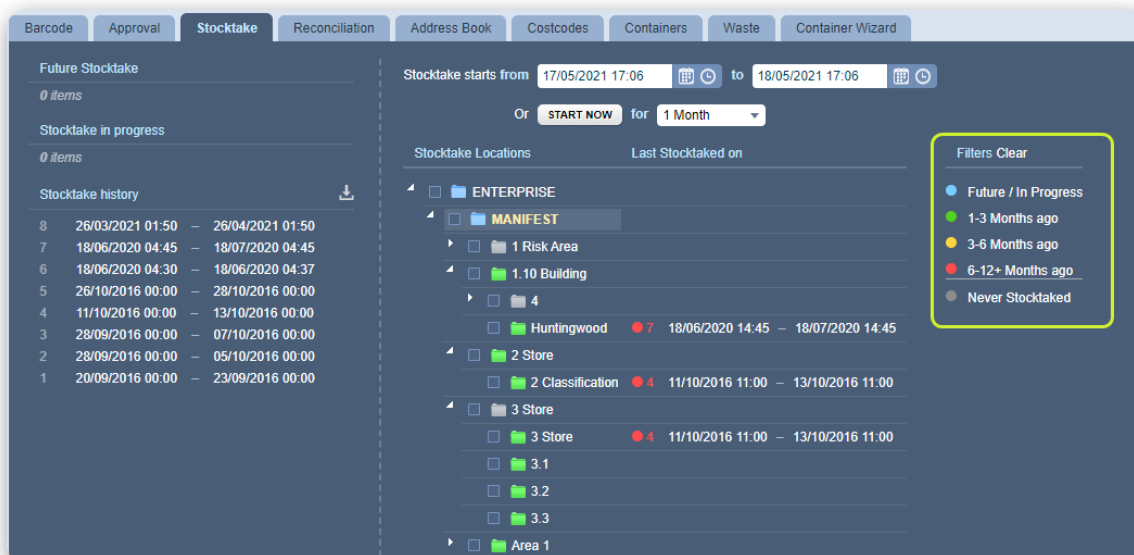
Stocktake provides a physical verification of the quantities and condition of items held in the Inventory; identifies missing and misplaced items for each location. Every location(s) has individual stocktake dates with duration shown.



The dates for the last stocktakes are labelled using the designated colour codes.



It is now possible to filter based on the duration of the stocktake.



Reconciliation mode has a new set of actions where pending items do not close the reconciliation, and it is possible to reconcile it once more. The reconciliation functionality has also been improved and provides the ability to transfer containers that are marked as lost or waste to a waste site right away. It also enables Sisot users to reconcile container discrepancies that may exist in a stocktake folder/location where the container items are not

reconciled against the actual or expected quantities. These items can be marked as lost or as waste and can be transferred out of the respective folder/location.

STOCKTAKE NO.: 14  
FROM: 13/08/2021 TO: 13/09/2021  
LAST EDITED ON: 13/09/2021  
STOCKTAKER: ADMINISTRATOR

BARCODE	CAT NUMBER	CAT NAME	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COMMENT	STOCKTAKE RESULT	ACTION
0000972287	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Pending
0000972288	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	Administrator		Missing	Mark Lost 1 Chemical Stor... Track Location
0000972289	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Pending
0000972290	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Pending
0000972291	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	Administrator		Missing	Mark Found Mark Lost Mark Waste Delete
0000972292	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	Administrator		Missing	Pending
0000972293	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Pending

In the transfer method, those items that are marked as lost or waste can be transferred out of their current stocktake folder through the transfer cart when in Containers mode.

## Barcode Generation Rules

Sisot can generate barcodes randomly or based on barcode parameters and accepts pre-printed barcodes, which can be sourced from the respective vendors.

- Barcodes can be generated randomly without any dependency on any properties of containers.
- Parameter based barcodes can be generated by Material Name, Vendor, Cat No.ID.
- User input barcodes are those that the user will manually assign or use a scanner to scan barcodes. Note that this function is useful when users want to utilise the vendor barcodes or preprinted barcodes.



When the “Random” barcode generation rule is used, the system generates a 10 digits barcode, so the barcode will start from 0000000001 to 9999999999. When all 10 digits are exhausted, then the system will generate a 13 digits barcode.



### Unique Barcodes

Sisot accepts unique barcodes. Every container is assigned a unique barcode number in the system.

## Barcode Label Templates

Sisot supports many commercial barcode labels as default templates. Users can also create customized templates in the D-Gen module.

## Pre-printed Barcodes

Users can pre-print barcodes from the system. Pre-printed barcodes can be used offline or when their physical storage location does not have printing hardware available.

## Action Barcodes (Commands)

Users can operate the system by using action barcodes. All operations in SiSoT can be performed by using scanners.

**SISOT MODE**

  
Start Scan

  
Transfer In

**1. Emptied**  
**Disposal Method:**

  
Contractors

  
Returned

  
Recycled

  
Trash

**Container Status**

  
Remove Status

**Reason:**

  
Re-used

  
Unwanted

  
Others

## 2. Waste Disposal Method:



Contractors



Treatments



Trash

## Reason:



Generated Waste



Contaminated



Damage



Catastrophe



Unwanted



Others

## 3. Surplus Reason:



Shared Assets



Unwanted



Others

## NEW REQUEST MODE

### Transfer



Start Scan



View Shop Cart



Submit



Delete




Transfer In



So, What is “Sisot”?

**Sisot** is the **Scan In Scan Out Technology module** designed by Chemwatch for the management of inventory/assets through requests, orders, transfers, shopping from your organisations own catalogue and conduct stocktake and reconciliation. This module incorporates the following capabilities:

- Inventory/Assets Management
- Container Registration <sup>123</sup>
- Managing Unregistered Containers 
- Transfer of containers
- Managing Receipts
- Shopping
- Stocktake and Reconciliation

Sisot is Chemwatch’s Advanced Chemicals Management system module (available in the Chemeritus application package). Sisot is also known as the “Container Module” accessible through the **Home/Manifest** module.





### Sisot Administrative Settings

The domain administrator of the Chemeritus system bears the responsibility to manage Sisot Settings for the entire system and Sisot users of the module. The Sisot Settings enables administrator to set up barcode generation rules, approvals rules, stocktake settings, address book, cost codes, container owner rights, container export reporting sequence, waste expiry web links and waste status. Consider the hierarchy below prior to setting-up users.

- Sub Administrator
- Creating manager roles for respective manifest sites, areas, sections, or locations
- Basic or simple roles
- Sisot role (optional, applicable to domains with asset management mode)

- Approver role (optional, applicable to domains with the Approvals Module)

The table below summarises the functional roles and related permissions.

Function	User Profile	Description	Permission
 Domain Administrative role	Primary Administrator of the system	Entire Access to the system	Full access with read-write permission to the entire system and able to set up users and respective privileges, products and user access management.
 Sub-Domain Administrative role	Secondary Domain Administrator of the system	Entire Access to the system with limited user access features	Full access with read-write permission to the entire system and able to set up users, assign roles + privileges, products as prescribed by the Administrator
 Management user role	Manifest Management level	Management of specific areas of the system's manifest	Ability to edit, (read-write permission) materials, access to assigned role permissions; to be able to manage data; report generator, dashboards, document filter tools, conduct risk assessments and many more...functions.
 Sisot module user role	Sisot module role	This role is applicable to domains that are licensed to the Sisot module	Sisot module users are required to have several Sisot related privileges and folder permissions to perform Sisot related activities in line with user interface settings.

### About Sisot Related Privileges

Privileges provide access to the user interface functionality and permission to view or use specific features, tools, attributes and edit capabilities. Users must be assigned to specific privileges based on their role or function on how they will use the system in their business or organisation. The list below shows privileges relevant to the Sisot module.

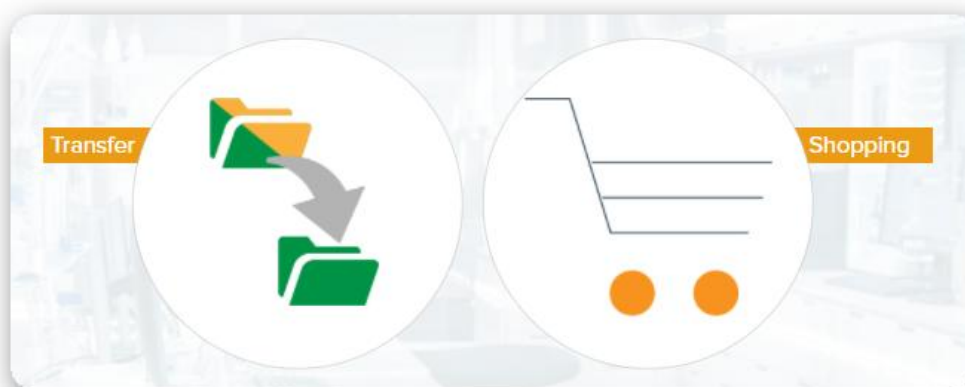
Access to accepting incompatibility receipt	Access to Sisot address book	Access to Sisot basic settings	Access to Sisot costcode settings
Access to Sisot stocktake settings	Access to status action barcodes	Approve quarantine containers	Manage catalogue
Unlock saved containers details	Sisot approver	Sisot central store	Sisot requester
Stocktaker	Store materials	Manage folders	Manage report generator

**i** User Privileges are dependent on user role.

Note that not all Sisot privileges may be assigned to every Sisot user as they are specific to a user role or function. The administrator will assign respective privileges based on the user's role in Sisot Module.

## 1.2 Sisot Workflow

The Sisot workflow is illustrated through **Internal** and **External** functions. The Internal function deals with **Requests** and **Transfers** whereas the External function deals with **Requests** and **Shopping from within Sisot Catalogue**. In certain stages of a transfer and shopping, an approval of a request may be required from an approving party.



### Internal Transfer Request

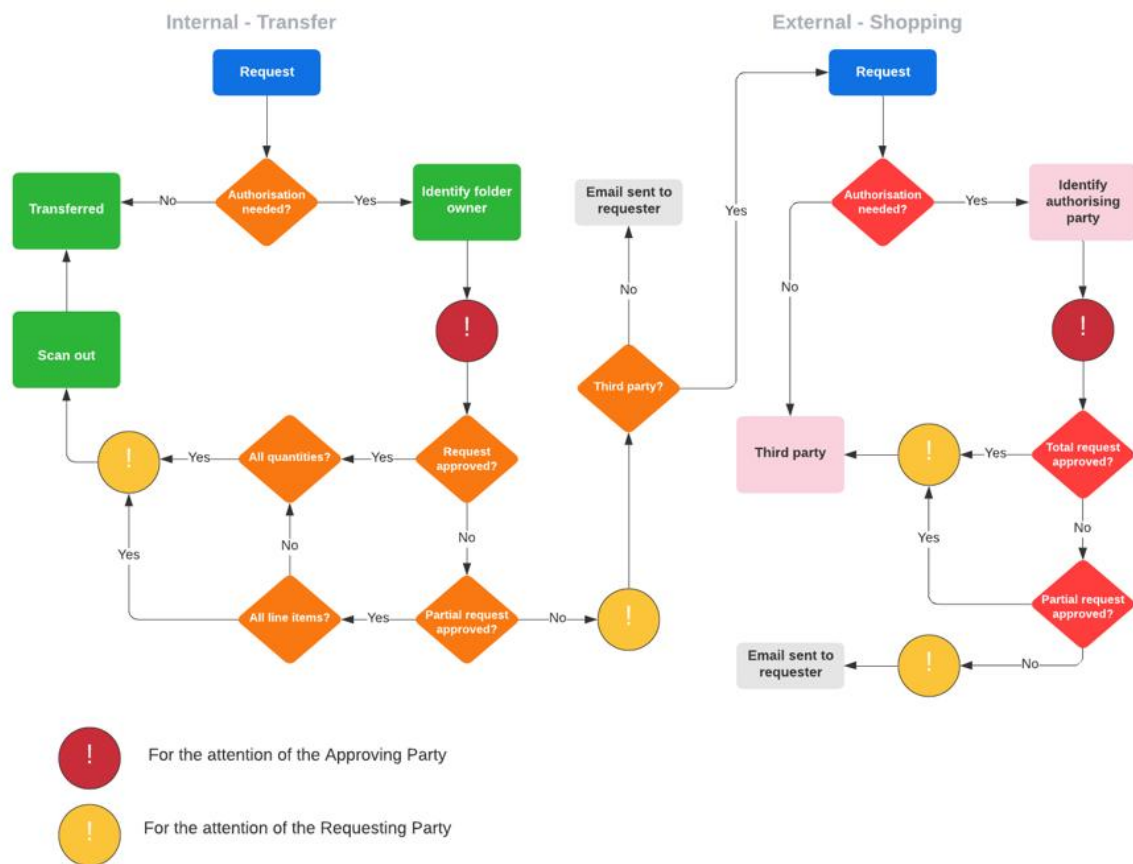
Requests will follow the standard workflow to be authorized if required or request will automatically be processed through the transfer procedure. If approval is required, then the approving party will in turn decide partial or total approval of the requested number of containers for the product. Upon approval of the request, the requesting party will be notified to accept (scan in) the approved containers. If the request is neither approved for the total number of containers nor partially approved, then the requesting party will get a notification update to that effect to possibly seek a third-party solution if the procedure stipulates as such.

### External –Shopping Request

The third-party solution is geared towards external shopping and hence the request will undergo authorization if applicable as per the company's procurement procedures.

**i** Shopping on World Wide Web through Sisot directly is NOT possible.




Sisot does not apply external shopping facilities on the web. The shopping function can only be achieved within the organisation's own inventory registered in the Chemwatch database using the own "Catalogue" folder.








## 1.3 Getting Started with Sisot

### Managing Sisot Configuration and User Settings

Setting up users and configuration of Sisot Settings is a strictly administrative function. Below is a summary of user role functions.

Responsibility Activity Flow	User Role Description
Managing Folders 	The end user can create and edit folders, assign folders the respective folder properties. This feature is dependent on the user's folder permission to "Manage Folders"; which is assigned by the administrator of the system.
Creating Folder Register 	The end user can search for a material, identify the containers from the Chemwatch database and edit container volume/weight, type of container and add containers into respective folder.
Requests, Transfers, Receipts, Stocktake and Reconciliation 	Users can submit container requests for transfers. Folder owners can approve requests for transfers. The domain administrator can schedule stocktake for specific folders/locations and assign the responsibility to the respective folder owner to conduct stocktake and reconciliation.



Generally, Sisot involves different types of users with varying privileges and specific roles designed to manage and streamline processes to ensure the right users have the appropriate permissions to carry out their respective roles effectively and efficiently.

User Type	User Privilege	Folders Description
Requester 	These are users responsible for initiating requests or orders within the system.	May not necessarily be associated with any folder. Users can search for a material/product and submit a request.
Approver 	Transfer approvers are users who review and authorise the transfer of containers or assets between different locations, departments within the organisation.	Transfer approvers do not have folder type restrictions. They ensure that transfers are necessary and align with the company's policies and procedures.
Stocktaker 	Stocktakers are responsible for conducting regular inventories and maintaining accurate stock records.	Stocktakers need not necessarily have any folder type restrictions to ensure verification of quantities, discrepancies, and conditions of items in stock and generate stocktake reports.
Storeperson 	Storepersons or warehouse personnel oversee the storage of material goods, receipts, labels and can transact	Storepersons in general own a shop folder  ; where all requests/orders are submitted and dispatch approved items.




requests, orders and allocate requests.











## How do Containers get Registered into Folders/Locations?

Containers can be added into folders/location by sending a formal request to customer service through an FTP  (File Transfer Protocol) upload of SDS and sending the respective container register spreadsheet  to the Chemwatch Customer Service Account Manager.

Containers can be registered as:

- Registered or
- Unregistered Containers

Registered containers are those products that have corresponding Vendor SDS and are registered in the Chemwatch database. When adding a registered container, the add new container wizard will show the registered green icon  along with the product name.

	CAT NUMBER	CAT NAME / CONTAINER NAME	VENDOR	CONTAINER SIZE / NUMBER / VOLUME	NON CHEMICAL	SELF	SHOW ALL
		benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	50 L	—	—	
	030850	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	100 gal	—	—	
		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	50 L	—	—	
		Benzene	Alfa Aesar (a part of Thermo Fisher Scientific)	30 L	—	—	
	31619	Benzene	Sigma-Aldrich (Merck)	25 L	—	—	

And once the registered container name has been selected, the product information section will show the registered flag as shown below.

**Add new container**

Container Additional Information Sara Destination Folder

☐ Non-Chemical Material Information: Red Tag D... Hazard Ale... Carcinogens

**1 Product Information** **Registered**

CAT Number  
030850

CAT / Container Name \*  
Benzene

Vendor \*  
Sigma-Aldrich (as MilliporeSigma, M) ☐ Self

Container Size \*  
100 US Imperial gal

Container Type  
Bottle

CAS No. Material State  
71-43-2 Liquid

Document Linked  
BENZENE, 99.9+%, HPLC GRADE

**2 Container Information**

Expiry Date

Acquired Date  
07/06/2023

Owner  
None

Note

Photo Upload  
No Photos

**3 Barcode Management**

Quantity \*  
1

☒ Chemwatch Generated Barcodes  
☐ Barcode for small containers  
☐ Chemwatch Pre-printed Barcodes

\* - Required

SAVE CLEAR CANCEL

### What are “Unregistered Containers”?

Unregistered containers are those products which do not have a corresponding product vendor SDS but are required to be added into your own organisation’s inventory. These products are known as “Unregistered Containers”. Unregistered containers are those assets not yet linked to any material/chemical entity nor a Vendor SDS in the Chemwatch global database collection.

**Add new container**

Container | UGD | Additional Information | Sara | Destination Folder

☐ Non-Chemical

**1 Product Information** Unregistered

CAT Number  
Start typing...

CAT / Container Name \*  
jhjhjhjh

Vendor \*  
ghghghg ☐ Self

Container Size \*  
0 Metric µg

Container Type  
Not Defined

CAS No. Material State  
None

Document Linked ⓘ  
No Document

**2 Container Information**

Expiry Date

Acquired Date  
01/07/2021

Owner  
None

Note

**3 Barcode Management**

Quantity \*  
1

☒ Chemwatch Generated Barcodes  
☐ Barcode for small containers  
☐ Chemwatch Pre-printed Barcodes

Photo Upload ⓘ  
No Photos

\* – Required

SAVE CLEAR CANCEL

This means that these containers can be created without Vendor SDS being available in the database collection. If a user requests an unregistered material, Chemwatch can then apply the registration process to any “Unregistered Containers”. This ensures that those containers will be linked to the appropriate Vendor SDS and become officially registered.

- Users can “**Create Containers**” of their **own chemicals**, for example, a substance created because of an experiment or research, testing, but will NEVER be registered; the **SELF Checkbox** must be marked for this instance.
- **Non-chemical items** can be added to the inventory. However, non-chemicals will not go through the registration process as they are not part of the Chemwatch registration scope.

**Add new container**

Container | Sara | Destination Folder

☒ **Non-Chemical**

**1 Product Information**

CAT Number  
Start typing...

CAT / Container Name \*  
jhjhjhjh

Vendor \*  
ghghghg

Number/Weight \*  
0 Metric µg

Container Type  
Not Defined

CAS No. Material State  
None

**2 Item Information**

Acquired Date  
01/07/2021

Owner  
None

Note

Photo Upload  
No Photos

**3 Barcode Management**

Quantity \*  
1

☒ Chemwatch Generated Barcodes  
☐ Barcode for small items  
☐ Chemwatch Pre-printed Barcodes

\* -- Required

SAVE CLEAR CANCEL

- Information about **biological organism** can be entered in the new container wizard. Biological data may include.
  - Risk Group (RG) 2-4 organism
  - GMO (Genetically Modified Organism)
  - SSBA (Security Sensitive Biological Agents)
  - Subject to Quarantine

**Add new container**

Container | UGD | **Additional Information** | Sara | Destination Folder

→ Radioisotope ☐ Biological ☐ ←

Activity Bq

Element Isotope

Reference Date

☐ Risk Group 2-4 organism  
☐ GMO  
☐ SSBA  
☐ Subject to quarantine

SAVE CLEAR CANCEL

### What are the functions available for Unregistered Containers?

The following functions are available to edit and transact containers and respective data.

- Container details are editable
- Containers can be deleted
- Container "Status" can be assigned
- Containers can be transferred (into waste folders as well)

- Ability to conduct Stocktake and Reconciliation
- Ability to use Forms from the Sisot mode grid
- Generate a Container Report only for container related data fields by using the Report Generator mode

### What functions are NOT available for Unregistered Containers?

- Manifest mode
- Risk Assessment module
- Approvals mode
- Data Extraction
- Tags
- Incompatibility information during Transfer of Containers
- Shopping

Drag a column header and drop it here to group by that column

TRACK	BARCODE	CAT NUMBER	PART NUMBER	CAT NAME	EXPIRY DATE	VENDOR	VOL / WT	TAGS	OWNER
	0000972274	Not defined	123	ACETONE	None	Concept Paints	2 l	CLP Hazar... Red Tag D... CoC	Administrator
	0000972279		123	Unregistered Product 1	None	Unregistered Vendor 1	5 kg		Administrator
	0000972280		123	Unregistered Product 1	None	Unregistered Vendor 1	5 kg		Administrator
	0000972282		123	Unregistered Product 1	None	Unregistered Vendor 1	5 kg		Administrator
	0000972281		123	Unregistered Product 1	None	Unregistered Vendor 1	5 kg		Administrator
	0000972278		123	Unregistered Product 1	None	Unregistered Vendor 1	5 kg		Administrator

### Setting for Manifest/ Sisot Grid Mode

A user interface setting to default to Manifest mode or Sisot Grid mode is available in UI Settings where users with the applicable permissions can set a preferred default display of the Manifest Grid or Sisot Grid view mode. The grid will default to Cat Name view irrespective of the default mode.

Use custom application logo for all users ☐

D-Gen Barcode Type

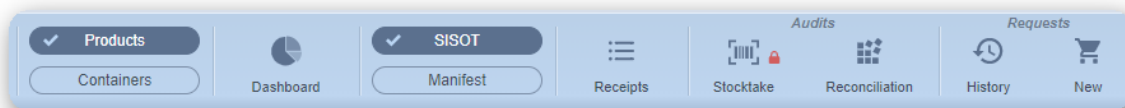
Material column default view


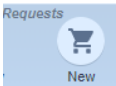
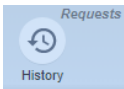

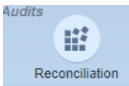
**Default Grid Mode**

Composite Hazchem Code

Custom header/footer for print list

## The Sisot Toolbar



Button	Feature	Description
	Receipts	Receipts mode displays the related receipt transactions for processing and/or history, including folder structure for locating receipt items. This mode involves tasks such as reviewing, approving, or rejecting requests.
	Requests New	The Request mode allows users to create a new transfer request for a product container to be added or transferred between folders.
	History	The History mode provides a historical lay of all requests in accordance with the respective statuses for all transactions; Pending, Approved or Declined. These requests are categorised as Outgoing; Incoming or Storeperson.
	Stocktake	The Stocktake mode allows stocktakers to perform stocktake. Note that the red lock icon means that a stocktake is locked in the currently selected folder location. To conduct a stocktake; there must be a scheduled stocktake and the lock icon will turn green for that specific folder location.
	Reconciliation	Perform reconciliation after a stocktake to ensure the accuracy and integrity of container inventories. This mode enables stocktakers to reconcile the quantities and counts of items obtained during stocktake. The stocktake results can be compared with the physical counts of each item by barcode scanning or through manual operation.

## Sisot Container Owner Functionality

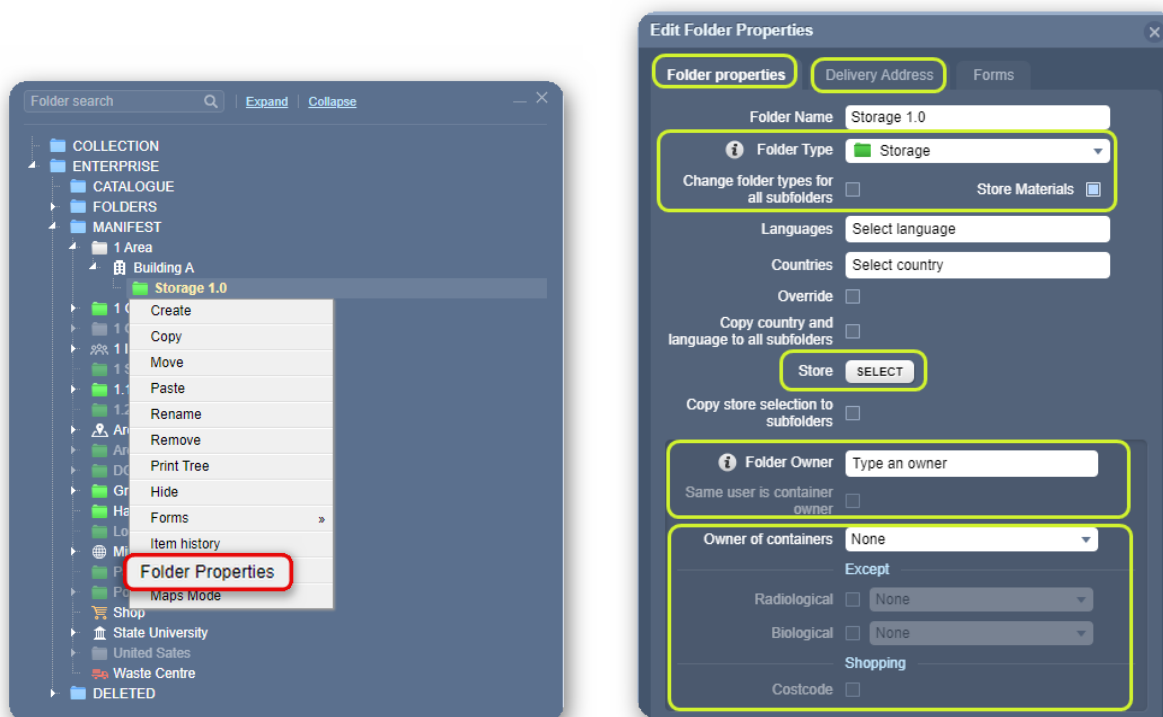
The Sisot module has a container owner functionality, providing a handy and more user-friendly approach to managing container ownership. The container owner is assigned by the domain administrator, who bears the responsibility of setting up and managing Sisot users within the system.

- Folder properties includes controls allowing users to set up container owners per location (folder/store)
- Shopping and transfer carts also provides controls to select container owner in the destination folder

## Folder Properties Relative to Sisot

Generally, folder properties and attributes in relation to the Manifest mode are discussed in full in the Chemeritus user guide. In the Sisot mode, folder properties topic is an extension to

the manifest related folder properties applicable to Sisot with rules to assign folder owner, container owner as well as setting a store folder.

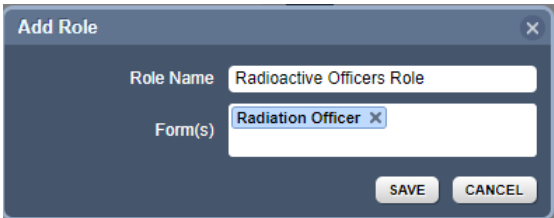
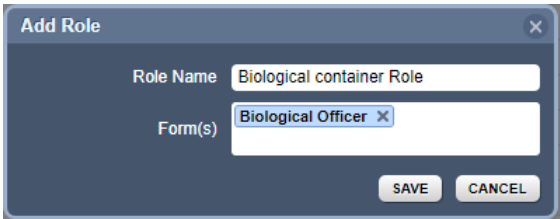





These Sisot related folder properties are described below.

Sisot Folder Property	Description
<b>Folder type</b> <div> <div></div> – Administrator Type           <div></div> – Storage Type           <div></div> – Shop Type           <div></div> – Waste Type         </div>	4 types of folder categories; administrative, storage, shop and waste. The primary folder types that can be set up for the use of Sisot are storage, shop and waste. However, the administrative folder type can also be used to register products.
<b>Store</b> 	The store should be set from the folder properties. A store is the type of folder used for shopping. Organisation may have multiple stores across a region or state or countries where chemical containers are internally sourced. This means in such a case scenario can be catered for by setting up a store folder for each site.
<b>Folder Owner</b> 	This attribute automatically sets the owner of all containers in the current folder. A dropdown list of all users in the domain provides the ability to assign a user as the owner of the folder and its content. The selected user is automatically assigned to be the owner of the containers during folder creation, transfer, shopping and reconciliation processes (except for Radiological and Biological containers).
Same user is Container Owner	Select <input checked="" type="checkbox"/> the respective checkbox <input type="checkbox"/> if the assigned folder owner is the same as the container owner.
Owner of Containers	Assign the respective owner of containers. This field provides a drop-down list of users to choose from.
Except Radiological Containers	This folder property when checked <input type="checkbox"/> ; enables a radioactive container role to be assigned to the respective folder for ownership of radioactive containers. A list of

Sisot Folder  
Property

Description

	<p>radioactive officers can be nominated through the Roles and Radiation Safety Officer Form located in the User Access Settings.</p> 
Except Biological Containers	<p>This folder property when checked <input type="checkbox"/>; enables a biological container role to be assigned to the respective folder for ownership of biological containers. A list of biological officers can be nominated through the Roles and Biological Officer Form located in the User Access Settings.</p> 
Shopping (Costcode) 	<p>This folder property is applicable for the shopping cart only. If it is checked <input type="checkbox"/>; for a destination folder, a list of owners within the shopping cart is restricted to users who have been assigned to the same costcode. Note that this folder property field does not affect radiological or biological containers.</p>
Forms 	<p>Assign an existing form to the current folder. This form must be created using the Form Builder module in settings and associated with folder properties. If the form is available, then user who are required to fill up the form, will use the folder right click option to access the form.</p>
Delivery Address (Street Address, City, Zip Code, Country) 	<p>Delivery address can be set for a location so that all containers in the current folder can be delivered to this folder.</p> <p>Delivery address can be set for a parent location so that all containers in the current folder can be delivered to this folder.</p> <p>Delivery address can be set for another location so that all containers in the current folder can be delivered to another folder.</p>





## Setting Up Folders for Sisot

Setting folder types is a vital first step to use the Sisot module. There are various folder types to choose from when creating a folder/location, however, there are four main folder types as described above with respective colour coding for ease of identification.

- Green storage folders
- Grey administrator type of folders



- Orange shop folders
- Red waste folders

Folder	Folder Type	Colour	Description
	Administrator	Grey folder	Products allowed to be stored in this type of folder if folder permitted to “Store materials”.
	Storage	Green folder	Products allowed to be stored in this type of folder if folder property is permitted to “Store materials”. A Storage folder when created will first default into an empty folder (grey colour).
	Shop	Orange folder	Intermediary source folder where product containers can be requested, stored or warehoused and approved before being distributed to another storage folder.
	Waste	Red folder	Waste folder can be used as an online waste disposal centre where used or expired containers as well chemical waste can be sent from any storage or shop folder. There are two types of waste folder; dispatch (waste collection) area or intermediary (temporary waste) area.

### Green Storage Folder

The storage folder type can be used to represent a laboratory, room, cupboard, or any other physical location where materials are stored and used. In addition to the generic storage folder type, users have the ability to specify the folder type as an exact location, such as a cabinet, shelf, or refrigerator. It’s entirely up to the user creating the storage folder whether they want to specify the type of storage location or keep it as a generic storage folder. When selecting the option to store materials, ensure that it is selected from within the folder properties. Allowing the folder to store materials means that any container can be added to that folder—provided the user has read-write access.

### Grey Administrator Folder

The administrator folder should be used to describe any building site or department area where materials are probably not stored directly; although they may have subfolders where containers are stored. For example, a university would have rooms and laboratories (storage folders) with containers, but the chemistry department (administrator folder) they are within would not have any physical containers in it per se. To make sure users cannot store materials in an administrator folder, ensure that the checkbox for “store materials” is unselected. This will guarantee that no containers can be added to these folder types. In addition to the generic administrator folder, users can also specify the folder type as an area, region or country, etc., if necessary.


## Orange Shop Folder


The shop folder is used as an intermediary folder where material containers can be requested, stored or warehoused before being distributed to other storage folders for general use. The shop folder could represent a physical central warehouse on site, or could be a theoretical site for processing and approval before being distributed to the actual site locations.

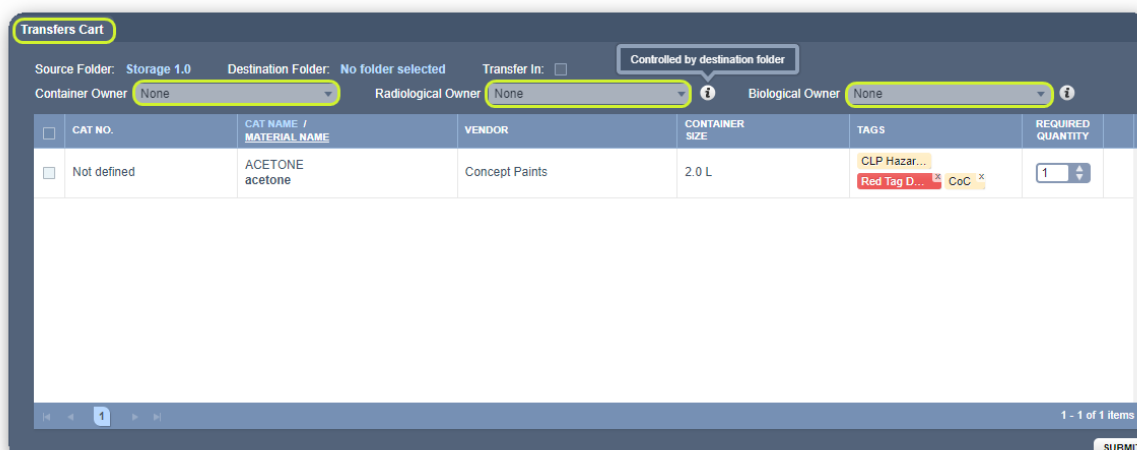
## Red Waste Folder

The waste folder is used as a waste disposal centre where used and expired containers, as well as chemical waste, can be sent from any storage or shop folder for removal. There are two folder types available for waste: dispatch area or intermediate area. The intermediate area is a temporary storage folder for waste, before it gets transferred into the dispatch area. You cannot use this intermediate folder for waste collection by contractors; instead you must transfer the waste to a waste dispatch area folder for it to be removed. The waste dispatch area folder can be used for waste collection by contractors. This will be expanded on later in the eLearning. In addition to waste, it is important to remove any physically depleted container from your manifest, in order to ensure stock lists remain current.

## Transfer/Shopping Cart

The transfer and shopping carts  were extended with functionality to select owner of the container being transferred.

- The selected owner will be set when destination folder is reached by the container
- A list of owners is available in the container owner  drop-down list; which is fully controlled by the owner setting defined in folder properties of the destination folder;
- Radiological and Biological owners are displayed for information only and can't be changed in the Transfer/Shopping carts and can be setup in folder properties of the destination folder.



**Transfers Cart**

Source Folder: Storage 1.0 Destination Folder: No folder selected Transfer In: ☐ Controlled by destination folder

Container Owner: None Radiological Owner: None Biological Owner: None

CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUIRED QUANTITY
<input type="checkbox"/> Not defined	ACETONE acetone	Concept Paints	2.0 L	CLP Hazar... Red Tag D... CoC	1

1 - 1 of 1 items

**SUBMIT**

- Only user with required level of access to a folder can be nominated as container owner . This rule can be set up in Settings > SISOT Settings > Containers tab.

- During auto-transfers in Reconciliation, the new container owner is automatically assigned based on selected container owner properties of destination folder.

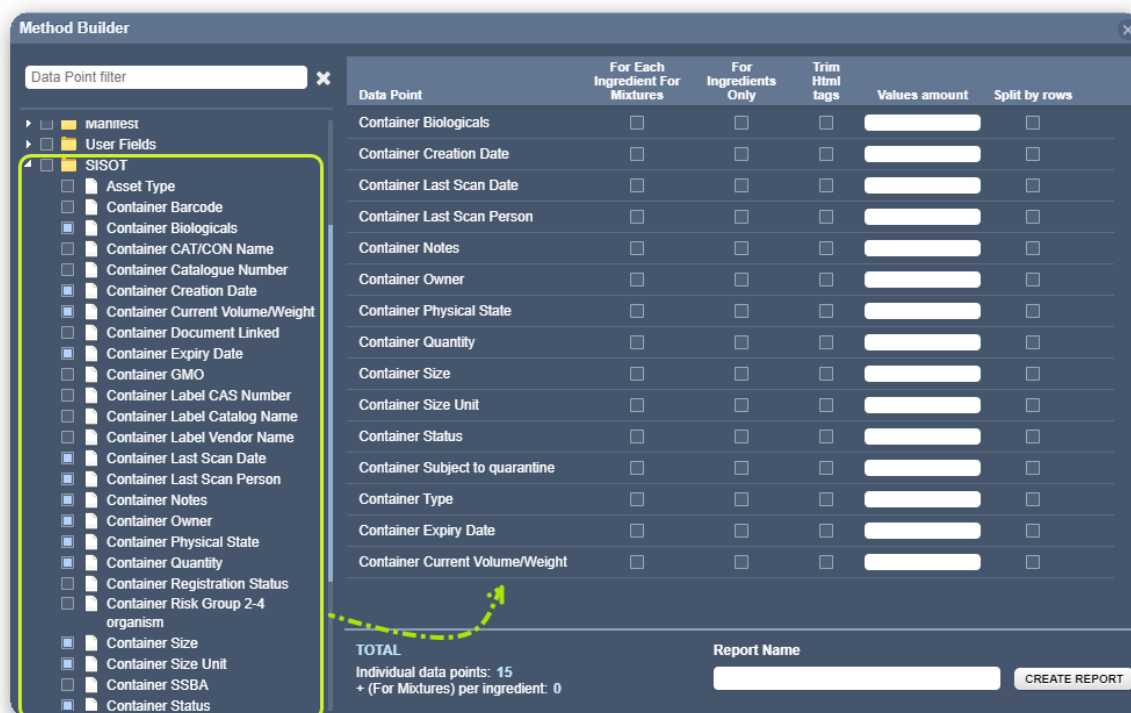
## Sisot Datapoints in Report Generator

New Report Generator data points will be introduced. These data points will display if a container has a Biological item in it, and whether it is: Risk Group 2-4 organism, GMO, SSBA or Subject to Quarantine. Another new data point, Container Type, displays whether the container is Registered or Unregistered.

The existing Container Status data point has been updated by showing whether the Container is Registered or Unregistered with a prefix before the container status, e.g. "**Unregistered – Quarantine**". These new Report Generator data points for Sisot include:

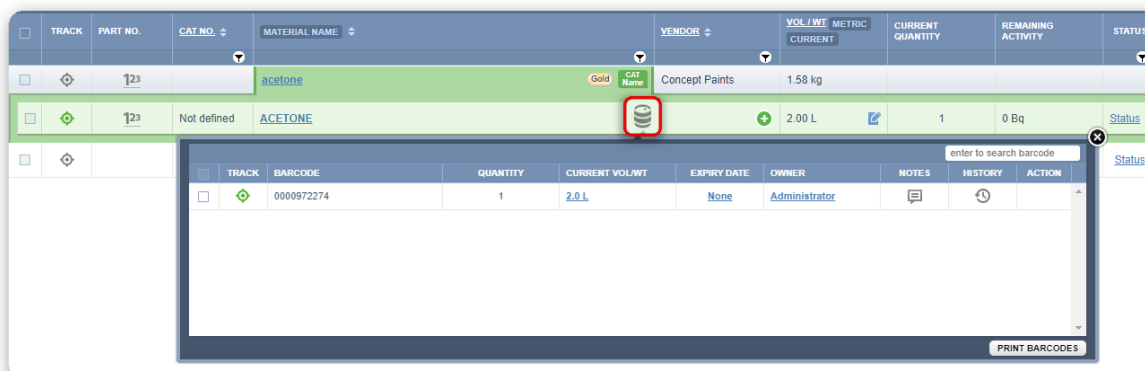
Datapoint	Description	Possible values
Container Type	Identifies if container is for chemical or non-chemical	Non-Chemical, Chemical
Container Biologicals	Identifies if container is biological	True, False
Container Risk Group 2-4 organism	Identifies if container is biological and contains Risk Group 2-4 organism	True, False


Datapoint	Description	Possible values
Container GMO	Identifies if container is biological and contains GMO	True, False
Container SSBA	Identifies if container is biological and contains SSBA	True, False
Container Subject to quarantine	Identifies if container is biological and is Subject to quarantine	True, False

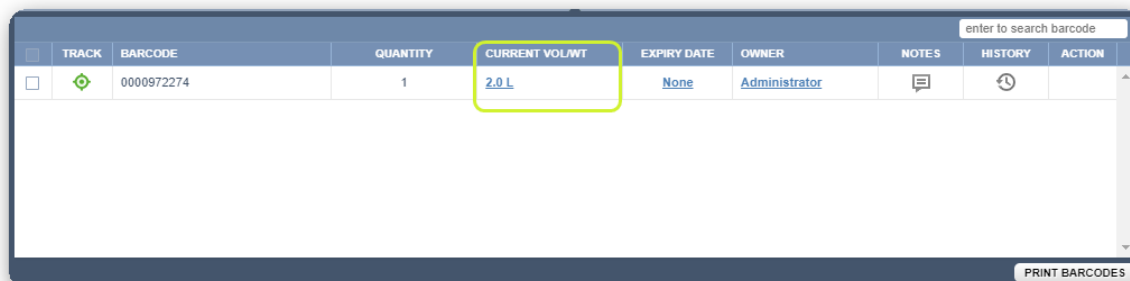





## Current Volume/Weight in the Barcode Table

A new feature to Sisot for tracking the usage rate of chemicals has been implemented. Current Volume/Weight can be captured in the barcode table, while the original Volumes/Weight of containers are retained the same in the Sisot grid.

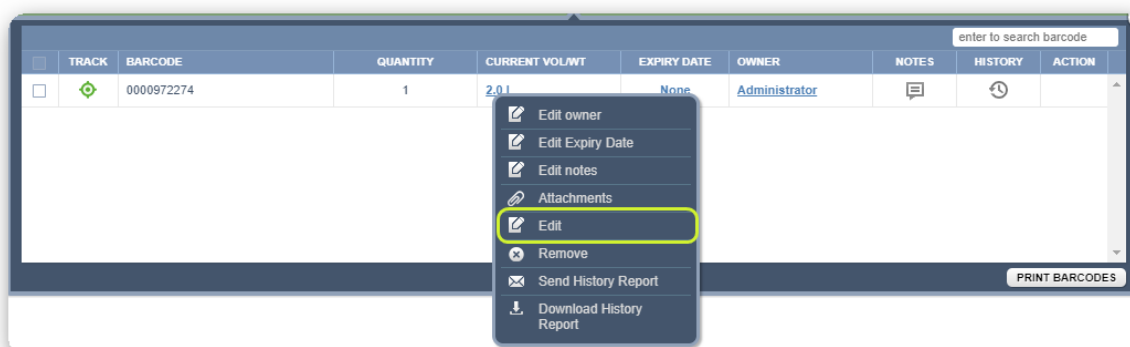





Current volume/weight can be set individually for each container by clicking  on the hyperlink in the current volume/weight column of the barcode table. Current volume/weight can never exceed the original container volume/weight.



TRACK	BARCODE	QUANTITY	CURRENT VOL/WT	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
<input type="checkbox"/>	 0000972274	1	2.0 L	None	Administrator			

Selecting the current volume/weight for a line barcode item will open the edit panel to be able change the respective container volume or weight on the same window. The edit button is available from the right-click menu.



TRACK	BARCODE	QUANTITY	CURRENT VOL/WT	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
<input type="checkbox"/>	 0000972274	1	2.0 L	None	Administrator			

- Edit owner
- Edit Expiry Date
- Edit notes
- Attachments
- Edit**
- Remove
- Send History Report
- Download History Report

## The New Request Mode

The **Transfer**, **Request** and **Shopping functions** are available in the **New Request** mode. Users who have been granted permission to use the Sisot mode can activate the shopping cart when New Request mode is activated. Users can activate the transfer cart by selecting a folder within the folder panel before any item can be added to the cart. The privileges and permissions below illustrate a user to initiate a transfer or a shopping request.

### Types of Requests

### Permission/ Privilege for requesters

Sisot mode	Access to the Sisot mode
Request/Transfer	Read access to source folder and Read and Write access to the destination folder
Shopping requests	Read+ Write access to the destination folder and the privilege to place shopping requests

## UGD Data Set for Unregistered Containers

A new tab “UGD” (User Gold Data) incorporated to the Sisot Add New Container Wizard enables users to assign UGD data set for Unregistered containers. This feature will allow users to add further information about a container when creating new containers or updating existing containers.

The UGD tab opens a Credo like form with functionalities to support UGD data set for Unregistered Containers such as Report Generator datapoints and Risk Assessment of Unregistered containers. The UGD form contains input specific data sets for the following categories:

- Product information
- Manufacturers Details
- Credite Poster (Ingredients & Physical Properties)
- Review Ingredients
- Extract Classification
- Dangerous Goods
- Precautionary Code (PCODE).



**Add new container**

Container **UGD** Additional Information Sara Destination Folder

**PRODUCT IDENTIFICATION**

eSDS ☐

Language

SDS Type

Catalogue Name

REACH Reg. No.

Issue Date

CAS No.

EC No.

UFI Numbers

[UFI Generator](#)

Part Number

Manufacture Product Code

**MANUFACTURERS DETAILS**

**CREDITE POSTER**

**REVIEW INGREDIENTS**

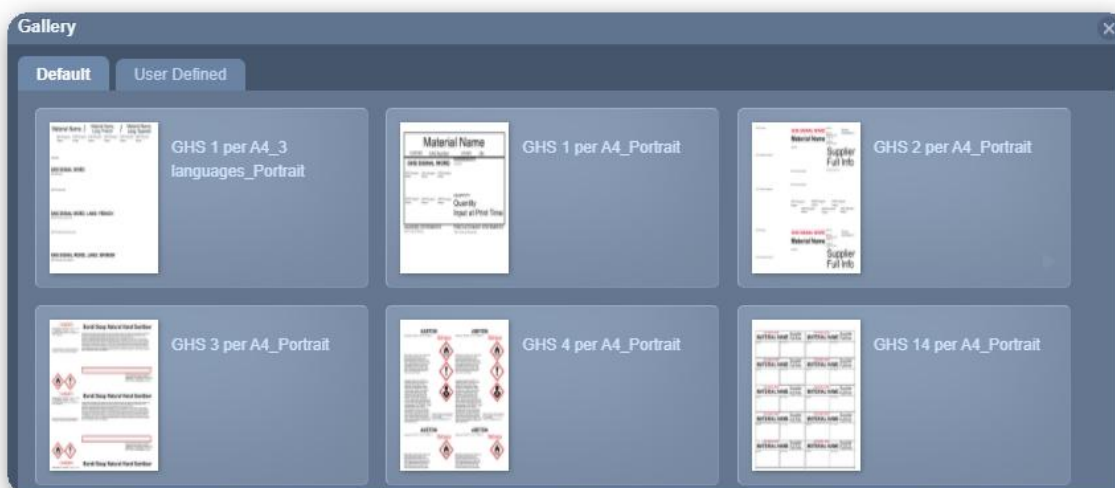
**EXTRACT CLASSIFICATION**

**DANGEROUS GOODS**

**PCODE**

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Users will have the ability to fill UGD data for Unregistered containers and also use the label function in the SDS and Labels panel to generate the respective container label.

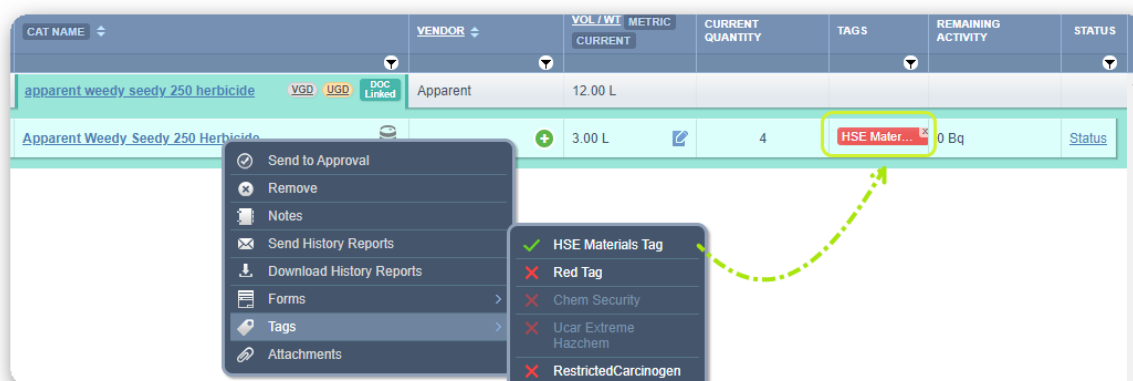


The Sisot grid will display the UGD icon alongside the newly Unregistered material once the data extraction has been saved.

CAT NAME	VENDOR	VOL / WT	METRIC	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
apparent weedy seedy 250 herbicide	Apparent	12.00 L				
Apparent Weedy Seedy 250 Herbicide		3.00 L		4	0 Bq	Status

### Manual, Automatic and Mixed Tags for Unregistered Containers

Tags can now be applied to Unregistered containers. Previously, the various types of tags could only be assigned to Registered containers in Sisot mode.





An assigned tag will be displayed in the Tags column within the material row as part of the grid display of information.

### 1.3.1 Creating a Sisot Folder

To create a folder and set the folder type, simply right click the manifest folder and select “Create” from the context menu. Within the “Add Folder” window, you will be given the option to choose your folder name and folder type. Folder type will depend on what sort of folder you are creating from the options already discussed above.

If the folder already exists, then you can still change the folder type by right clicking on the folder and selecting folder properties. Note that Sisot folders are part of the Manifest tree directory.







**i** The **principal purpose of the Manifest** is to provide emergency services authorities with information on the quantity, type and location of dangerous goods stored and handled on business premises to enable them to respond to an incident. Safework Australia provides a **Hazardous Chemical Register Template** for reporting hazardous chemicals as per the WHS requirements. Chemwatch recommends checking for the specific manifest reporting requirements. Report Generator functionality within the system helps to create your own templates to generate respective reports based on the chemical inventory from your own Manifest/Folders/Locations.

Folder Edit	Task Attribute	Folder Node Action
<b>Create</b> 	Users can create (add) a folder on any node. All newly created folders will default to empty folders	 Add folder

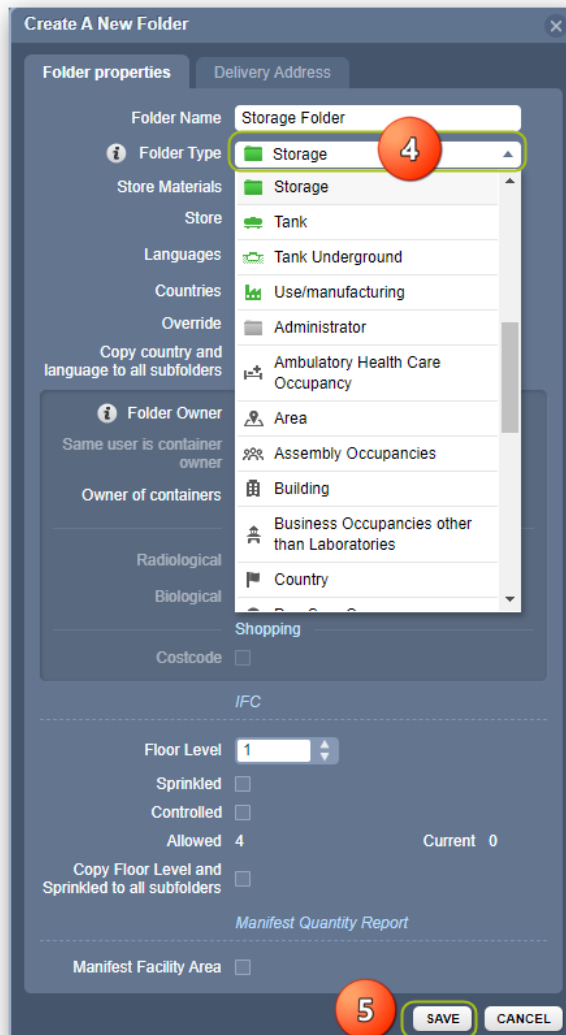
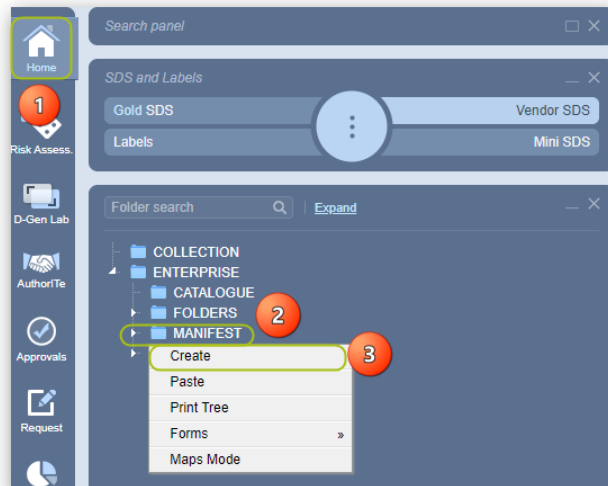
The following steps illustrate **how to create a single folder for storage** under the Manifest system directory folder node.


**i** If a user does not have the edit rights permission to create folders, consult with the administrator of the Chemwatch application within your business or organisation to grant the respective folder permission, read-write to the Manifest Directory or to the specific folder location.

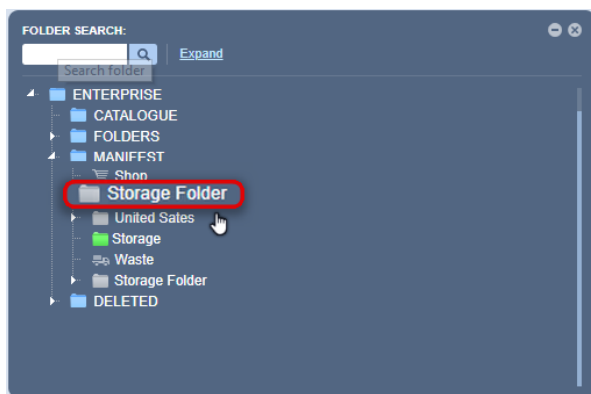
#### Steps: Create a single storage folder

1. Go to the **Home module**  (if it's not already the default module).
2. **Right click**  on the manifest system tree directory folder node .
3. Select  the **Create** from the drop-down task menu.
4. Click  the folder name **text field** and type the name of the folder, e.g., Storage Folder and maintain the default folder type as ‘**storage**’ (green folder).
5. Click  the **Save** button.





6. The newly created **storage folder** defaults to a grey folder since it is an **empty folder** .



**i** Note that the storage folder defaults to an empty grey folder until materials or product SDS containers are added to the folder and then it will turn into a green storage folder.

## 1.4 Add a New Container (Registered/Unregistered)

### The Add Container Wizard

The Add Container Wizard contains the following tabs:

- Container
- UGD
- Additional Information
- SARA
- Destination Folder

**UGD tab:** User Defined Data Extraction; **Credo-like Form**

**Additional Information tab:** User Defined Data Extraction; **Credo-like Form**

**Sara tab:** United States SARA Reporting on product containers; **Set of SARA data fields**

**Destination Folder tab:** Destination folder selection from the **Tree Structure/Manifest**

**Container tab:** Enter the container details; **Product Information, Container Information & Barcode Management**

The Add **Container** window contains the following information.

Container tab: Enter the following details about the product's container:  
**1. Product Information**

Container tab: Enter the following details about the product's container:  
**2. Container Information**

Container tab: Enter the following details about the product's container:  
**3. Barcode Management**

Use the magnifying glass to find product SDS and link it to the container

Container/product image is optional

Press the **Save** button to complete adding container into the selected folder location

## Container tab

Add a new container and provide the following information:

**Product information** – Vendor barcode/Cat number, Cat/Container name, Vendor, Container size and/or link document.

**Container information** – Expiry date, acquired date, owner, container type and notes.

**Barcode Management** – Quantity, generate barcodes (option for small containers) or preprinted barcodes.

## UGD tab

Add User Gold Data for unregistered containers or update existing containers. This tab provides a form to fill in specific information about the product:

- Product information
- Manufacturers Details
- Ingredients (Physical Properties)
- Review Ingredients
- Extract Classification
- Dangerous Goods
- Precautionary Code (PCODE)

## Additional Information tab

Provides two options to input data for radioisotope information and biological information about the product container.

### Radioisotope

A radioisotope is a known radio-active isotope (unstable atomic nucleus due to imbalance of neutrons and protons) which emits energy and particles when it changes to a more stable form.

Use the following fields to add information about the container.

- Activity
- Measure
- Element type
- Isotope assigned by default
- Reference date

### Biological


Biological information can be set from the optional checkboxes depending on the category of the product and if its subject to quarantine.

- Risk Group 2-4 organism
- GMO (Genetically Modified Organism)
- SSBA (Security Sensitive Biological Agent)
- Subject to quarantine


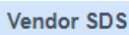
### Sara tab

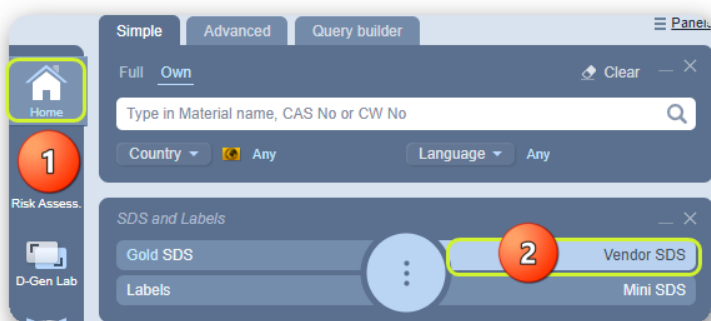
SARA is the United States Superfund Amendments and Reauthorization Act designed to fund clean of sites containing hazardous substances and pollutants. SARA inventory reporting requires that container information must be provided on amounts, location, storage and conditions of hazardous chemicals and mixtures. This tab enables SARA related information to be assigned to a product container as per the following set of data fields.


- Average volume/weight and unit of measure
- Released volume/weight and unit of measure
- Temperature – Ambient, below, above or cryogenic
- Pressure - Ambient, below or above
- Sold form – Molten, In Solution or In Powdered Form
- Sara Container Type – select from the drop-down list (Above ground tank,

In this activity, the **New Container** is a known **Registered**  **product** that exists in the full Chemwatch database collection and has a corresponding Vendor SDS.

### Steps: Add new container (registered) into a folder location

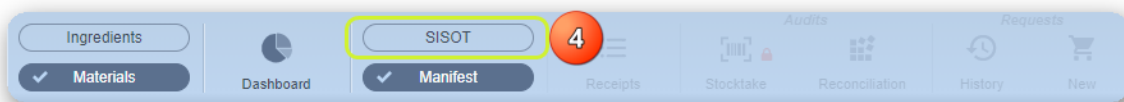
1. Press the **Home** module button .
2. Press the **Vendor SDS** button .





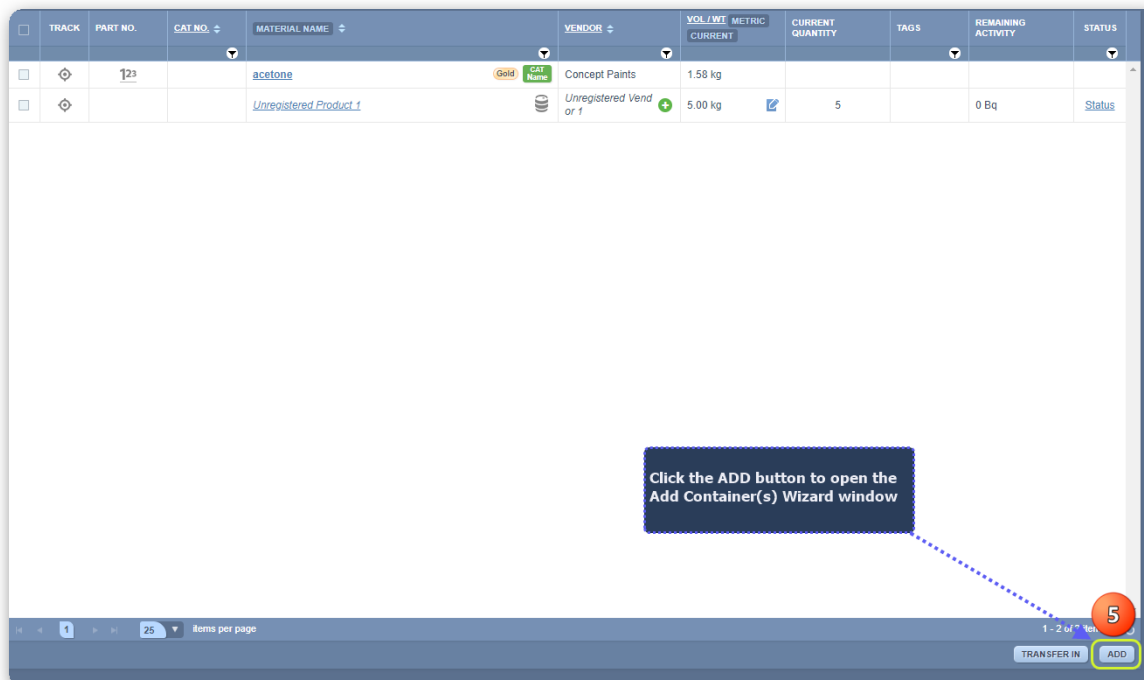
3. Click  on the **Folder storage name** within the Manifest directory.





4. Press the **Sisot** button to activate the mode.



- Click  on the **ADD** button  to open the “Add Container wizard” to add a container by inputting specific container information about the product.



- The Add New Container window defaults to the Container tab. Type the **CAT/Container Name**.
- Select the cat name/container name from the table of existing registered product containers.

Product Information	Container Information	Barcode Printing
Type the vendor barcode/CAT Number in the text field.	Use the calendar icon  to assign the respective container expiry date.	Type the quantity for barcode printing.
Type the CAT/Container Name (Note that is a required field).	Assign the container owner  from the drop-down list of users.	Select the applicable barcode generation rule to either generate barcodes for the container (checkbox option for small containers) or use pre-printed barcodes
Type the Vendor name (Note that is a required field).	Assign the container type from the drop-down list.	
Type the Container Size (Note that is a required field): <ul style="list-style-type: none"> <li>Value amount</li> <li>Unit of measure</li> <li>Unit type</li> </ul> Document linked automatically if available for the product	Type any information about the container in the Notes text field.	

Product Information (If a document is not linked, search for one or upload).	Container Information	Barcode Printing
---	-----------------------	------------------

**Add new container**

Container UGD Additional Information Sara Destination Folder

☐ Non-Chemical

**1 Product Information**

CAT Number  
Start typing...

CAT / Container Name \* **6**  
Benzene

**2 Container Information**








Expiry Date

Acquired Date  
01/07/2021

**3 Barcode Management**


Quantity \*  
1







☐ Chemwatch Generated Barcodes

	CAT NUMBER	CAT NAME / CONTAINER NAME	VENDOR	CONTAINER SIZE / NUMBER / VOLUME	NON CHEMICAL	SELF	SHOW ALL
		benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	50 L	-	-	<input type="checkbox"/>
	030850	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	100 gal	-	-	<input type="checkbox"/>
		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	50 L	-	-	<input type="checkbox"/>
		Benzene	Alfa Aesar (a part of Thermo Fisher (Kandel) GmbH)	30 L	-	-	<input type="checkbox"/>
	31619	Benzene	Sigma-Aldrich (Merck)	25 L	-	-	<input type="checkbox"/>
	12095	Benzene <b>7</b>	Sigma-Aldrich (as MiliporeSigma, Merck)	2 L	-	-	<input type="checkbox"/>
		benzene	Nutur (a division of Amgrow)	10 L	-	-	<input type="checkbox"/>

\* - Required

SAVE CLEAR CANCEL

- i** The **Container Cat name** is a known **Registered**  product in the database, the product Information section of the wizard will display the tag **Registered** and will also automatically display material information for any existing tags **Tags for Q...** that have been already created and assigned to the material. These tags will show on the top right-hand corner of the wizard as shown below.
- i** Other container information fields will also be automatically populated as well for; the **container size, unit of measure and unit type, acquired date, container type, vendor barcode, document linked container name and barcode quantity** (which defaults to 1 container for default generated barcodes rule).

8. In the **Container Information** fields, click  the **calendar icon**  to assign the respective container expiry date (dd/mm/yyyy).
9. Click  the **calendar month/year header** to select the applicable month and year.
10. Click  the calendar month/year header backward/**forward arrow** to select the respective month and year. In this case, the forward arrow is used to go to the upcoming year to set the exact expiry date.
11. Select  the **calendar month** for the assigned year to set the exact month.
12. Select  the **calendar day of the month** for the assigned year to set the exact day.

13. Select the **"Owner"** drop-down arrow to list existing users of the Sisot module
14. Select the **"Container Owner"** from drop-down list of users
15. Click on the **"Quantity"** text field to type the number of containers
16. Check the box for the type of **barcode generation rule**.
17. Click the **"Save"** button to add the container



**Add new container**

Container Additional Information Sara Destination Folder

☐ Non-Chemical Material Information: Red Tag D... Carcinogens

1 Product Information **Registered**

CAT Number  
12095

CAT / Container Name \*  
Benzene

Vendor \*  
Sigma-Aldrich (as MilliporeSigma, M) ☐ Self

Container Size \*  
2 Metric L

Container Type  
Bottle

CAS No. Material State  
71-43-2 Liquid

Document Linked *i*  
BENZENE, 99.9+%, HPLC GRADE X

2 Container Information

Expiry Date **12**  
08/02/2024

Acquired Date  
01/07/2021

Owner **13**

None  
None  
Administrator  
EVERYONE **14**  
Basicuser  
Advanced User  
userZ  
Stage1 Approver  
Stage2 Approver  
Stage3 Approver  
userdefinedra  
Super User Name1  
Super Admin1  
Chemwatcher User

3 Barcode Management

Quantity \* **15**  
14

☐ Chemwatch Generated Barcodes  
☐ Barcode for small containers  
☐ Chemwatch Pre-printed Barcodes

**16**  
SAVE CLEAR CANCEL

\* -- Required

*i* Add container confirmation message will be displayed to confirm the action. The container record will be available in the Sisot grid for that specific product. Once the container has been added, a label barcode for that container can also be printed for future use.

✓ Container has been successfully created X



18. Choose a default or a custom label template from the gallery to generate printed barcode(s); in this case a default label format size is used, Avery 2x4 template

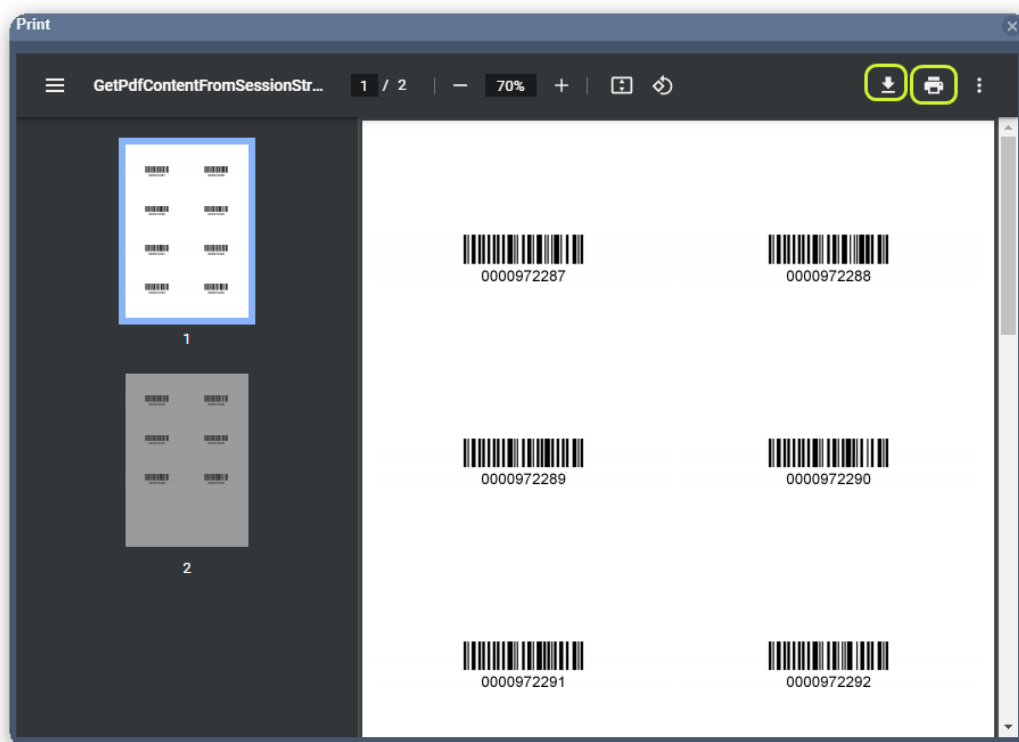
**Label templates**


Default User Defined





Avery 2x4 template  
Avery 2x7 template  
Avery 2x8 template  
Avery 3x7 template  
Avery 3x8 template  
Avery 3x10 template  
Avery 3x11 template  
Avery 4x12 template  
Avery 5x13 template  
Avery 5160 - 30 labels on 8.5 X 11 Page with hazard phrases  
Avery 5160 - 30 labels on 8.5 X 11 Page  
Labelpower 30x20mm labels on roll

1 - 12 of 13 items

19. Select  **Print** or Download (Save) button from the PDF  document viewer to print your label. This label can later be used for scanning container item(s) when transferring or conducting a stocktake & reconciliation.




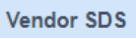
 The container record of the registered item will be available in the Sisot grid for that specific product.

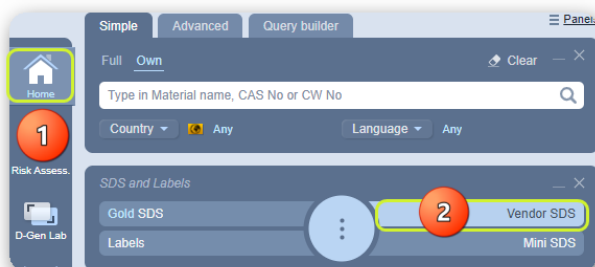
<input type="checkbox"/>	TRACK	PART NO.	CAT. NO.	MATERIAL NAME	VENDOR	YOL. LWT	METRIC	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
<input type="checkbox"/>		123		acetone	Concept Paints	1.58 kg				
<input type="checkbox"/>		123		benzene	Sigma-Aldrich (as Milp oreSigma, Merck)	28.00 L				
<input type="checkbox"/>		123	12095	Benzene		2.00 L		14	0 Bq	Status
<input type="checkbox"/>				Unregistered Product 1	Unregistered Vend or 1	5.00 kg		5	0 Bq	Status

## 1.5 Add a New Container (Self Registered)

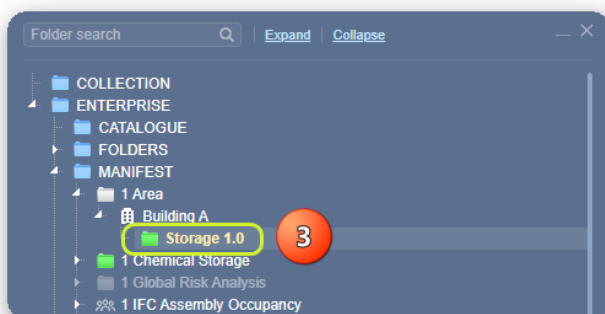
In this activity, the new container is illustrated as an **Unregistered** product container in the Chemwatch database and therefore; does not exist in the Full Collection or in your Own Manifest inventory. Self-registration means that the material container will not be a registered container in the Chemwatch database.

### Steps: Add a new container as self-registered

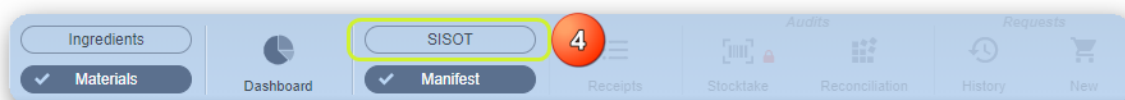
1. Press the **Home** module button .
2. Press the **Vendor SDS** button .





3. Click  on the **Folder/Location store name** within the Manifest directory.




4. Press the **Sisot** button to activate the mode.








5. Click  on the **ADD** button  to open the “Add Container wizard” to add (create) a container by inputting specific container information about the product.


**i** The **Add Container wizard** enables a user to input respective container data for registered/unregistered container including a “self” registration option. In this exercise, we will add a container for a **“Self-Registered Container”**.


- The add new container window defaults to the Container tab. Type the **CAT/Container Name**, e.g., Self-Registered Container
- Select the **“Self”** checkbox alongside the Vendor field. Upon selecting the “Self” checkbox, the Vendor text field will be greyed out. Input information to the rest of the container fields.


Product Information	Container Information	Barcode Printing
Type the <b>Container Size</b> (Note that is a required field). <ul style="list-style-type: none"> <li>Value amount</li> <li>Unit of measure</li> <li>Unit type</li> </ul>	Set <b>Expiry Date &amp; Acquired Date</b> Use the calendar icon to assign the respective container expiry date.	<b>Barcode Management</b> Type the container <b>Quantity</b> for barcode printing.
Choose the <b>Material State</b> <ul style="list-style-type: none"> <li>Solid</li> <li>Liquid</li> <li>Gas</li> </ul>	<b>Container Owner</b> Assign the container owner  from the drop-down list of users.  <b>Note</b> Type any information about the container in the Notes text field.	Select the applicable <b>barcode generation rule</b> to either generate barcodes for the container (checkbox option for small containers) or use pre-printed barcodes.



**i** As the **Container Cat name** is an Unregistered product, after selecting the Container name/Cat name, the Product Information section of the wizard will display the tag; **Unregistered**.

8. In the container size fields, enter the **size of the container** and the respective **units of measure**.
9. In the **Container Information** fields, click  the **calendar icon** to assign the respective container expiry date.
10. Click  the **calendar month/year header** to select the applicable moth and year.
11. Click  the calendar month/year header backward/**forward arrow** to select the respective month and year. In this case, the forward arrow is used to go to the upcoming year to set the exact expiry date. Select  the **calendar month** for the assigned year to set the exact month.
12. Select  the **calendar day of the month** for the assigned year to set the exact day/month/year for acquired date.

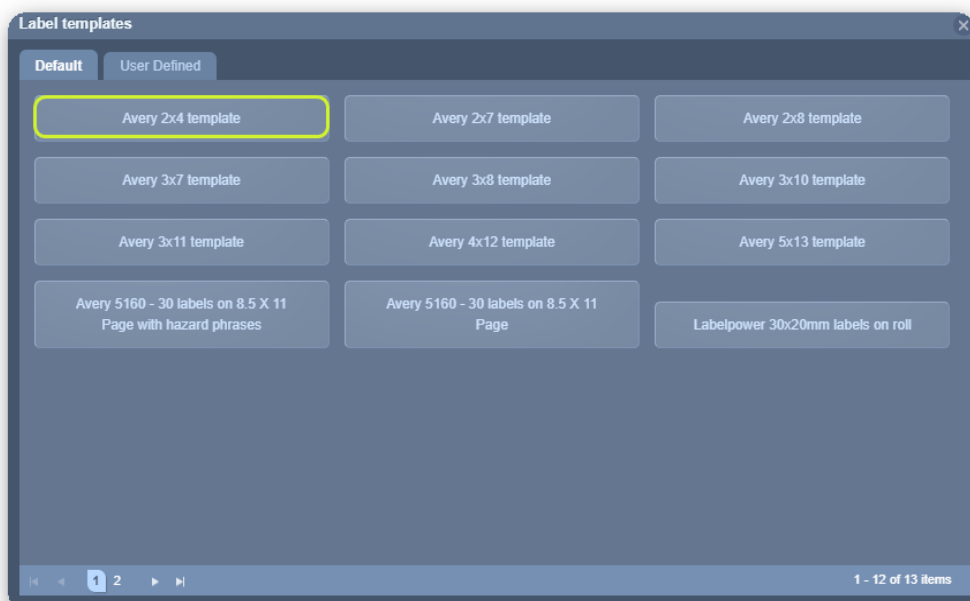
13. Select the **"Owner"** drop-down arrow to list existing users.
14. Select the **"Container Owner"**  from drop-down list of users.



15. Click on the “Quantity” text field  to type the number of containers.
16. Select the type of **barcode generation rule**.
17. Click the “Save” button to add the container.

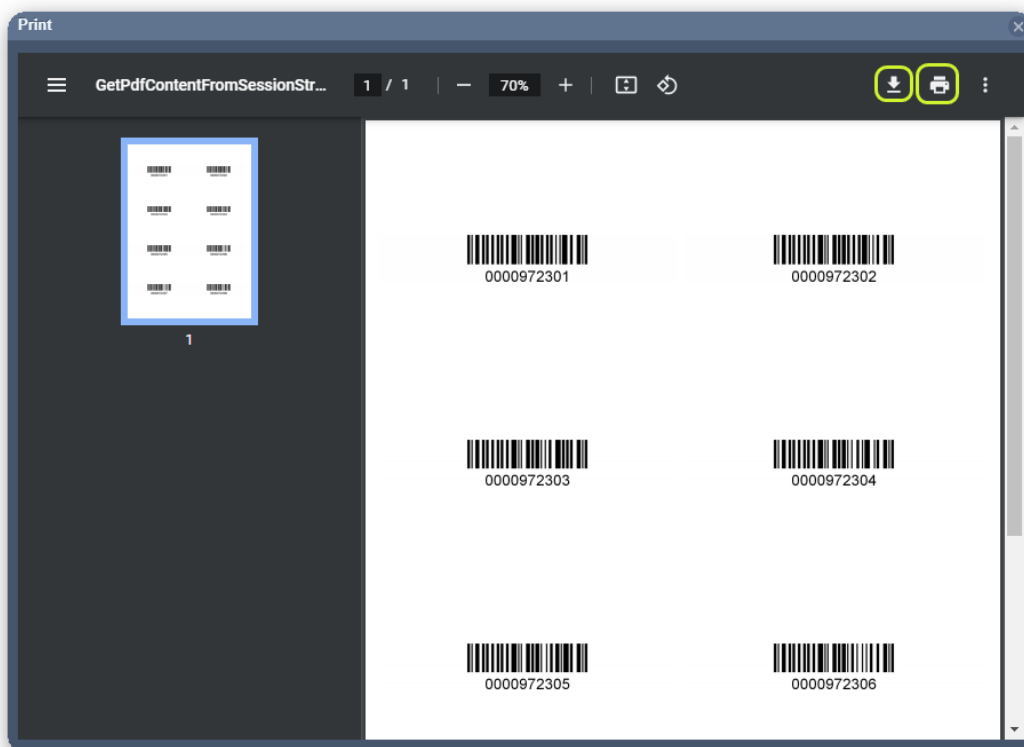
 Add container confirmation message will be displayed to confirm the action. The container record will be available in the Sisot grid for that specific product. Once the container has been added to the inventory, a label for that container can also be printed.


 Container has been successfully created 

18. Choose a default or a custom label template from the gallery to generate printed barcode(s); in this case a default label format size is used, Avery 2x4 template



19. Select  **Print** or Download (Save) button from the PDF  document viewer to print your label. This label can later be used for scanning container item(s) when transferring or conducting a stocktake & reconciliation.



 The container record for the “Self” registered item will be available in the Sisot grid with corresponding barcodes.

CAT NO.	MATERIAL NAME	VENDOR	VOL / WT	METRIC	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
	acetone	Gold CAT Name Concept Paints	1.58 kg				
	benzene	UGD Gold CAT Name Sigma-Aldrich (as Milp oreSigma, Merck)	28.00 L				
	Self Registered Container	— +	1.00 L		8	0 Bq	Status

TRACK	BARCODE	QUANTITY	CURRENT VOL/WT	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
<input type="checkbox"/>	0000972308	1	1.0 L	12/10/2022	Administrator			
<input type="checkbox"/>	0000972307	1	1.0 L	12/10/2022	Administrator			
<input type="checkbox"/>	0000972306	1	1.0 L	12/10/2022	Administrator			
<input type="checkbox"/>	0000972305	1	1.0 L	12/10/2022	Administrator			
<input type="checkbox"/>	0000972304	1	1.0 L	12/10/2022	Administrator			
<input type="checkbox"/>	0000972303	1	1.0 L	12/10/2022	Administrator			

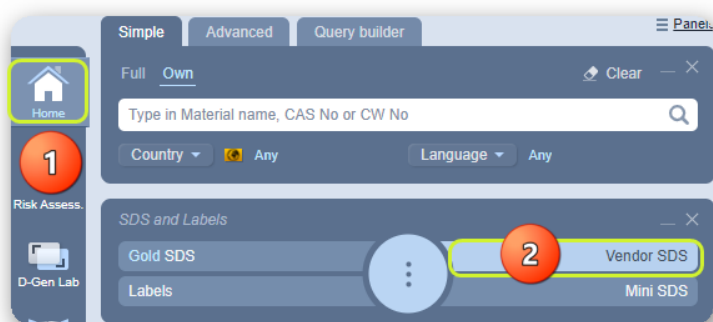
PRINT BARCODES

## 1.6 Add a New Container (Non-Chemical)

In this activity, the **New Container** will be added as an **Non-Chemical** product container and will not exist in the Full Collection or your Own Manifest inventory prior to adding this container item. A non-chemical can be anything that is a material, equipment, or any item other than a known chemical (pure or non-pure substance).

**Steps: Add anew container for non-chemical**

1. Press the **Home** module button .
2. Press the **Vendor SDS** button .

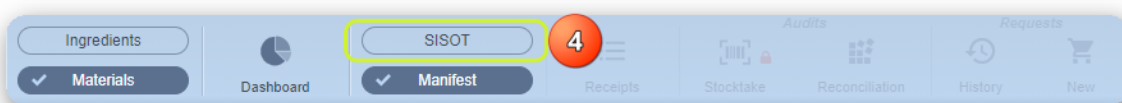




3. Click  on the **Folder/Location store name** within the Manifest directory.

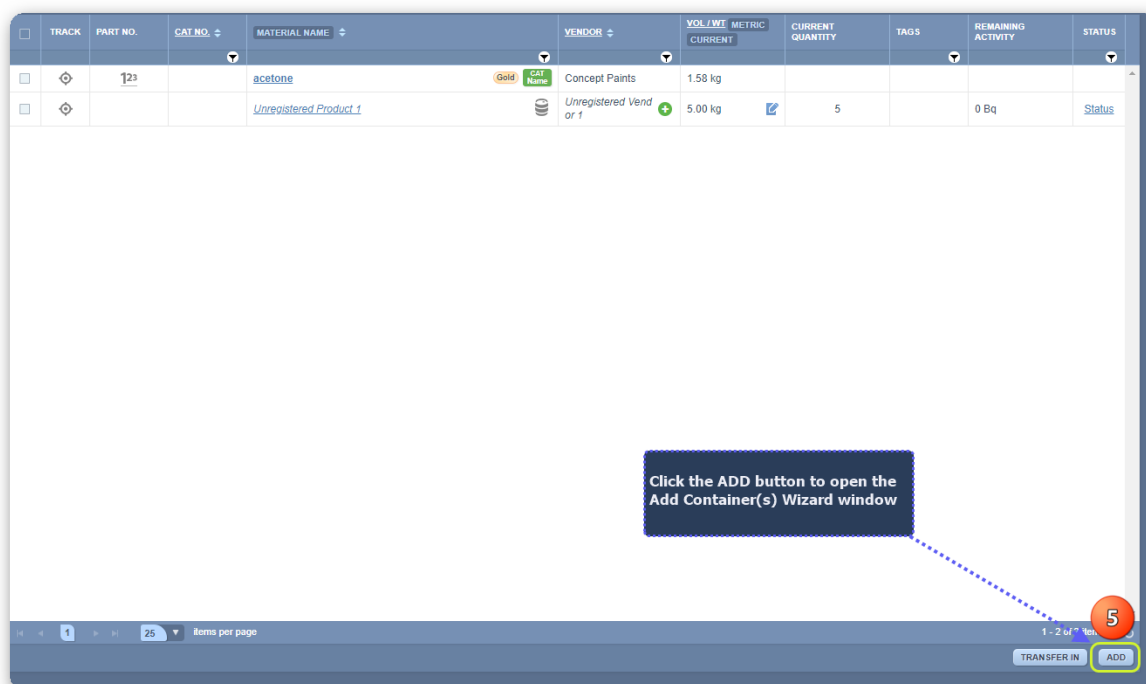




- Press the **Sisot** button to activate the mode.








- Click  on the **ADD** button  to open the “Add Container wizard” to add (create) a container by inputting specific container information about the product

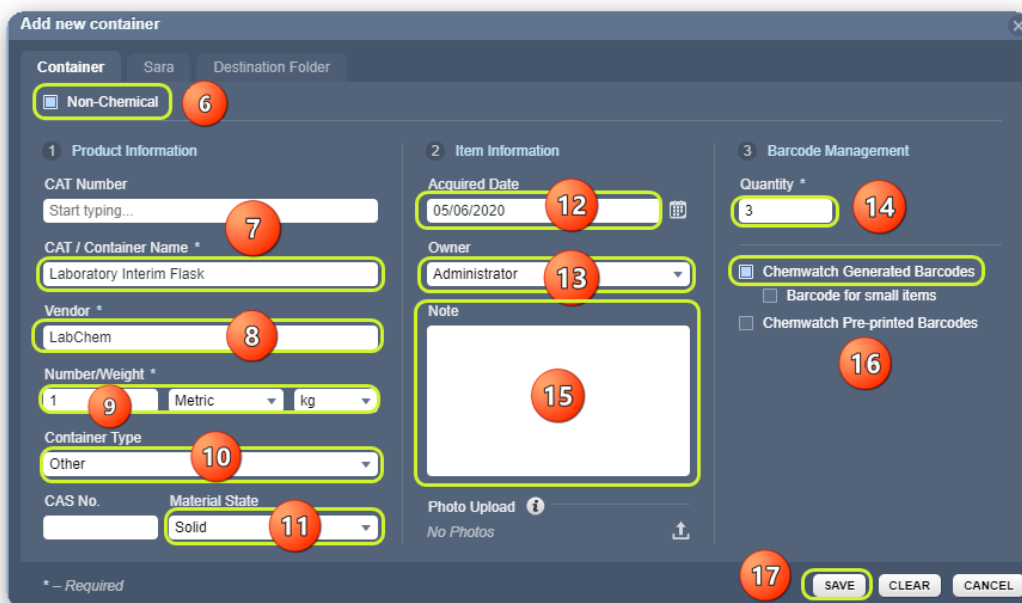


 The **Add Container wizard** enables a user to input respective container data for registered/unregistered container including a “Non-Chemical”.

- Select the “Non-Chemical” checkbox above the product information section

**i** Upon selection of the “non-Chemical” checkbox option, the document link field will disappear from the wizard optional fields.

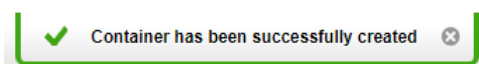
7. The ‘Add New’ container window defaults to the Container tab. Type the **CAT/Container Name**; e.g., Laboratory Flask. Note that this field is required to be filled.
8. In the Vendor text field, **type the Vendor name**. Note that this field is required to be filled.
9. In the **Number/Weight** fields, enter the **Number/Weight** of the item including the **units of measure**. Note that the fields are required to be filled.
10. Select the “**Container Type**” drop-down arrow to assign the type of container  if it applies.
11. In the Product Information section, assign the **Material State** (optional), e.g., Solid.
12. In the Item Information section, assign the **Acquired date** by using the calendar icon.
13. Select the “**Container Owner**  ” from drop-down list of users.
14. Click on the “**Note**” text field  to type some pieces of information about the container
15. In the **Barcode Printing** section, click on the “**Quantity**” text field  to type the number of containers.
16. In the **Barcode Printing** section, select circle (radio button ) for the type of **barcode generation rule**
17. Click the “**Save**” button to add the container



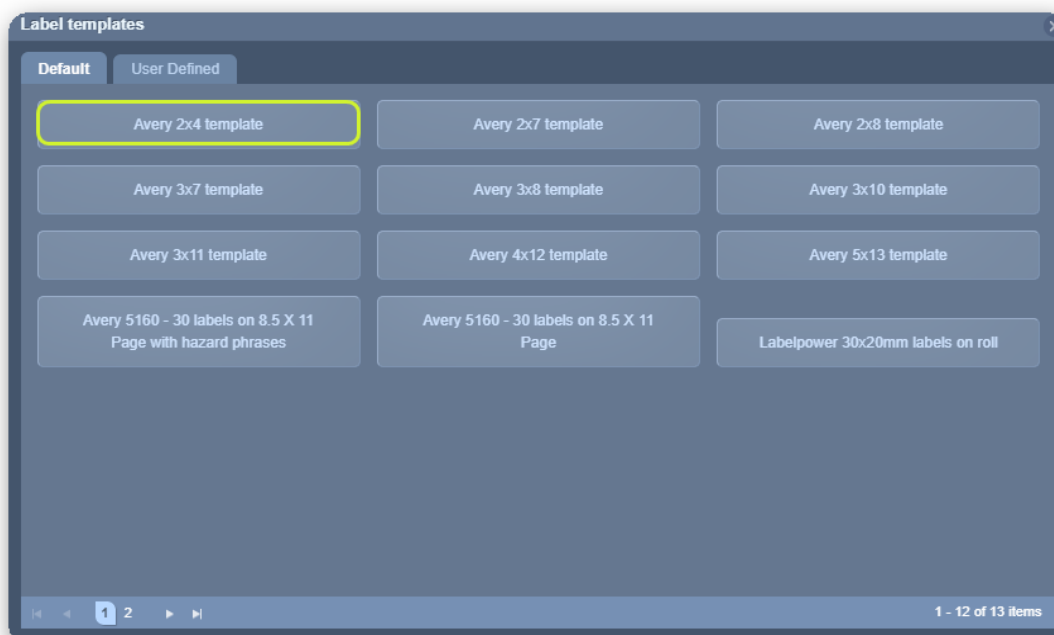
The screenshot shows the 'Add new container' window with the following fields and actions highlighted by numbered callouts:



- 6**: Non-Chemical checkbox
- 7**: CAT / Container Name text field
- 8**: Vendor text field
- 9**: Number/Weight text field
- 10**: Container Type dropdown menu
- 11**: Material State dropdown menu
- 12**: Acquired Date text field with calendar icon
- 13**: Owner dropdown menu
- 14**: Quantity text field
- 15**: Note text area
- 16**: Barcode Management section with radio buttons for 'Chemwatch Generated Barcodes' and 'Chemwatch Pre-printed Barcodes'
- 17**: Save button

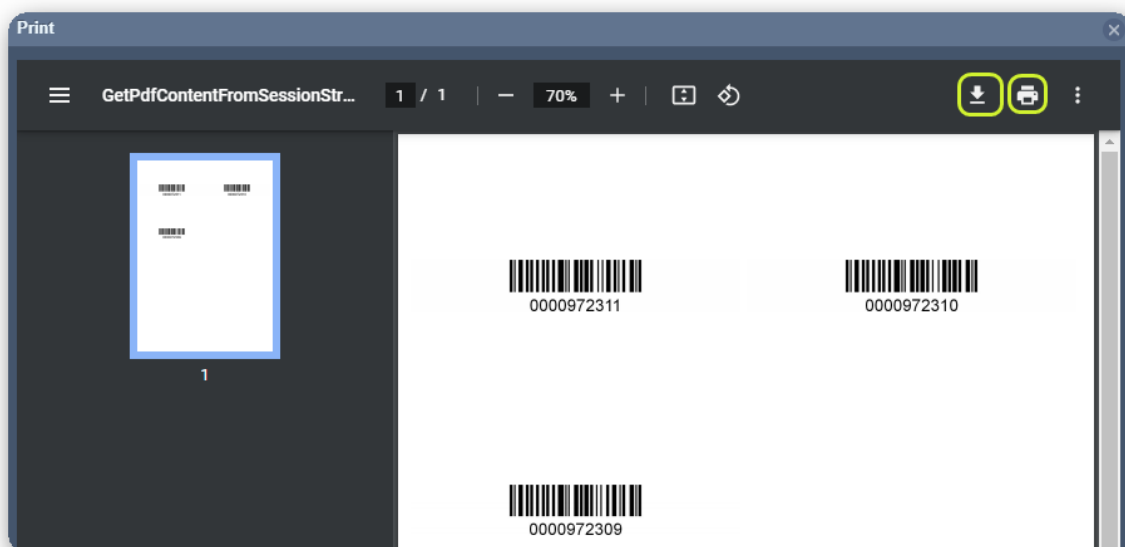
**i** Add container confirmation message will be displayed to confirm the action. The container record will be available in the Sisot grid for that specific item. Once the container has been added to the inventory, a label for that container can also be printed.




18. Choose a default or a custom label template from the gallery to generate printed barcode(s); in this case a default label format size is used, Avery 2x4 template



19. Select  **Print** or Download (Save) button from the PDF  document viewer to print your label. This label can later be used for scanning container item(s) when transferring or conducting a stocktake & reconciliation.



 The container record for the “non-Chemical” item will be available in the Sisot grid for that specific material.

TRACK	PART NO.	CAT. NO.	MATERIAL NAME	VENDOR	VOL. WT. METRIC CURRENT	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
	123		acetone	Concept Paints	1.58 kg			
	123		benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	28.00 L			
			Laboratory Interim Flask	LabChem	1.00 kg	3	0 Bq	Status


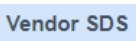
  

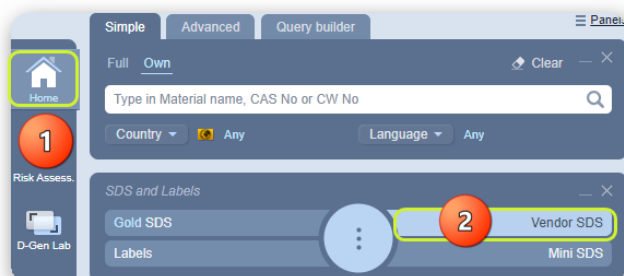
TRACK	BARCODE	QUANTITY	CURRENT VOL. WT.	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
	0000972311	1	1.0 kg	None	Administrator			
	0000972310	1	1.0 kg	None	Administrator			
	0000972309	1	1.0 kg	None	Administrator			

## 1.7 Adding Container(s) to an Existing Vendor

In this case scenario, if it happens that there's more containers from an existing vendor in a location, that container can easily be added. The steps below show how quickly get this done.

**Steps:** Add container(s) of an item to an existing vendor

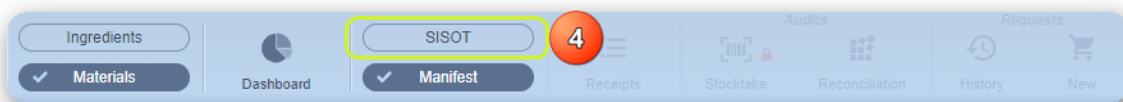
1. Press the **Home** module button .
2. Press the **Vendor SDS** button .





3. Click  on the **Folder/Location store name** within the Manifest directory.






4. Press the **Sisot** button to activate the mode.




- Press the **Cat Name** button  to expand row on the grid.

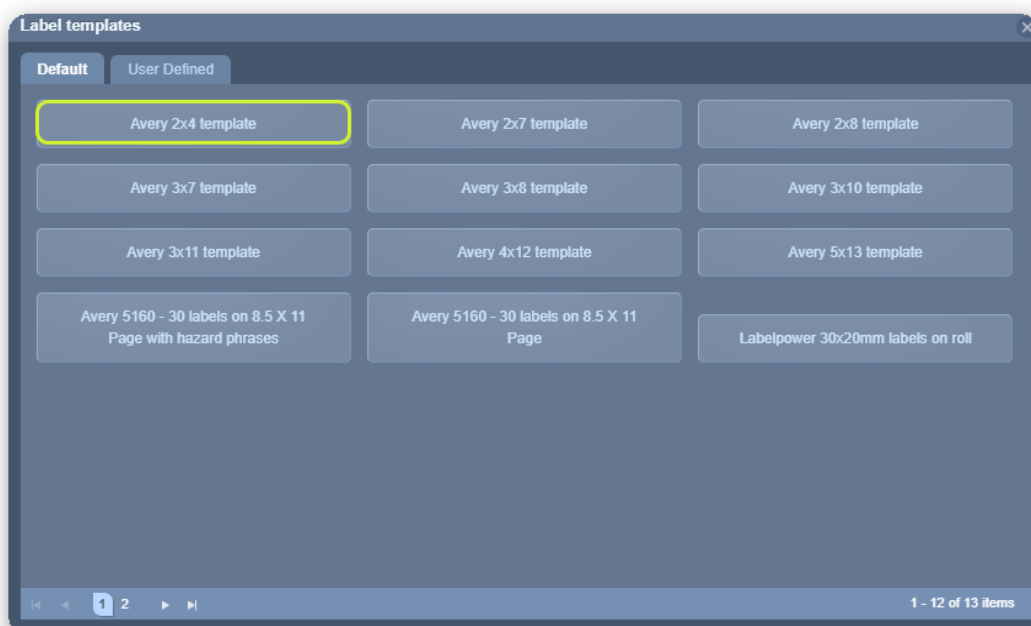
 The container record for the Cat Name may have multiple vendor containers, this is shown by the display button, **Multiple**  alongside the material name. Click on the multiple button to expand the row to view the respective container items for existing vendors to add more containers by using the Add icon.



- Select  the **Add** icon  under the vendor column for that Cat Name item within the row. This action will open the Add New Container wizard window.

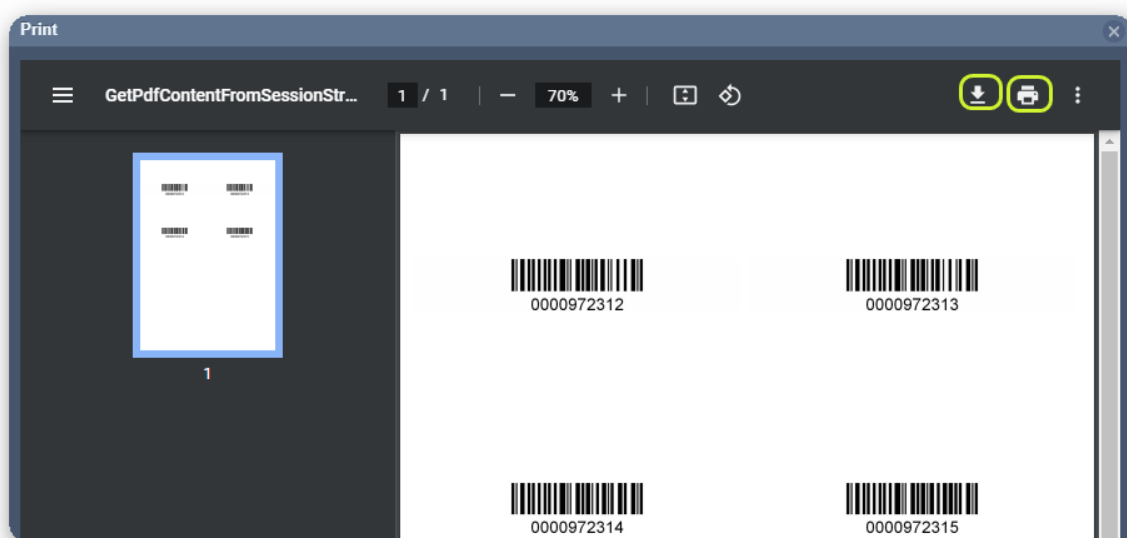
 The Add New Container record details will be automatically populated with details about the already existing container information for product information, container information and barcode printing. Change any information about the product and container where applicable. In this case, only the barcode printing section's "**Quantity**" will be changed.


- In the Barcode Management section, click on the "**Quantity**" text field  to type the number of containers. Note that the quantity number that is displayed is the record of the existing number of containers previously assigned to the product.
- In the Barcode Management section, select the type of **barcode generation rule**.
- Click the "**Save**" button to add the container.

10. Choose a **default or a custom label template** from the gallery to generate printed barcode(s); in this case a default label format size is used, Avery 2x4 template



11. Select  **Print** or Download (Save) button from the PDF  document viewer to print your label. This label can later be used for scanning container item(s) when transferring or conducting a stocktake & reconciliation.



 The container record for the added item will be shown in the Sisot grid for that specific material's current quantity column.

<input type="checkbox"/>	TRACK	PART NO.	CAT NO.	MATERIAL NAME	VENDOR	VOL / WT	METRIC	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
<input type="checkbox"/>		123		acetone	Concept Paints	10.00 L				
<input type="checkbox"/>		123	Not defined	ACETONE		2.00 L		5	0 Bq	Status
<input type="checkbox"/>		123		benzene	Sigma-Aldrich (as MilporeSigma, Merck)	28.00 L				
<input type="checkbox"/>				Laboratory Interim Flask	LabChem	1.00 kg		3	0 Bq	Status
<input type="checkbox"/>				Self Registered Container	—	1.00 L		8	0 Bq	Status
<input type="checkbox"/>				Unregistered Product 1	Unregistered Vendor 1	5.00 kg		5	0 Bq	Status

## 1.8 Adding Attachment Documents to Containers

A new feature has been added in Sisot to enable users to **attach documents** to an individual container. Previously; attachments could only be uploaded to the product level through forms. However, different files can now be uploaded as attachments to individual containers in Sisot mode through the Barcode container panel even if they are grouped as one product in the Sisot subgrid. Multiple attachments are allowed to be added per container, from which point they can also be viewed, emailed, printed, downloaded and/or removed. The most frequently used file extensions are supported.

This new feature provides various option to edit container information as per existing barcode(s). The container barcode information is displayed in columnar form (see description below).

<input type="checkbox"/>	TRACK	BARCODE	QUANTITY	CURRENT VOL/WT	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
<input type="checkbox"/>		0000972274	1	2.0 L	None	Administrator			
<input type="checkbox"/>		0000972315	1	2.0 L	None	None			
<input type="checkbox"/>		0000972314	1	2.0 L	None	None			
<input type="checkbox"/>		0000972313	1	2.0 L	None	None			
<input type="checkbox"/>		0000972312	1	2.0 L	None	None			

Checkbox	Track	Barcode	Owner	Current VOL/WT	Quantity	Expiry Date	Notes	History
Use checkbox to select barcode item	Select track icon to locate the product folder	Barcode identity number for the container	Shows the owner of the container	Displays the current volume or weight of container associated with the barcode to edit as well	Displays the current quantity number of the container(s) associated with the barcode	If expiry date is set, it will be shown here for that container barcode	Any additional information provided in notes will be displayed here to edit	View the container history associated with the barcode item

From the barcode information table, a mouse right click on any barcode number will open up the context menu; which contains the following edit and tasks' options:

	TRACK	BARCODE	QUANTITY	CURRENT VOL/WT	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
<input type="checkbox"/>		0000972274		2.0 L	None	Administrator			
<input type="checkbox"/>		0000972315		2.0 L	None	None			
<input type="checkbox"/>		0000972314		2.0 L	None	None			
<input type="checkbox"/>		0000972313		2.0 L	None	None			
<input type="checkbox"/>		0000972312		2.0 L	None	None			

## Container Barcode

## Use Description

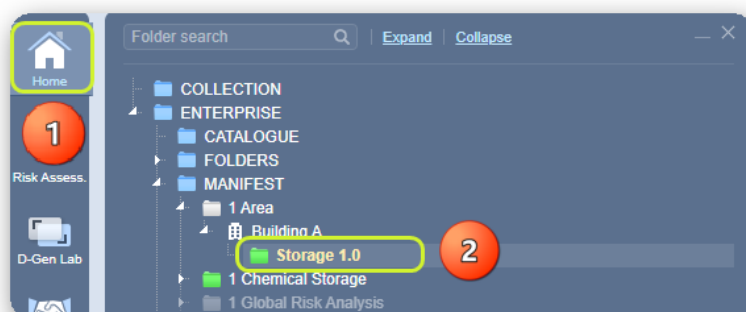
### Action

Edit Owner	Edit the owner of the container associated with the barcode
Edit Expiry Date	Edit the container expiry date associated with the barcode
Edit Notes	Edit notes associated with the container barcode
<b>Attachments</b>	Add attachments associated with the container barcode
Remove	Delete a container with its associated barcode
Send History Report	Email history report associated with the container barcode
Download History Report	Download and save a history report of the associated container barcode

The following steps show how to use the right-click option to add an attachment for a selected container barcode item.





### Steps: Add attachment documents to containers

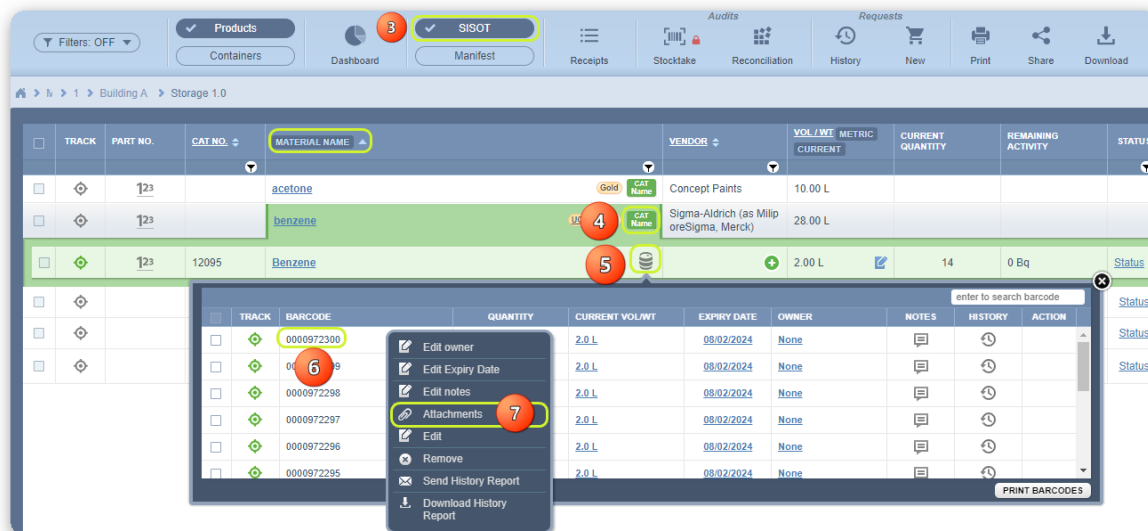
1. Select the **Home** module button.
2. Select a **Folder** location under the Manifest directory.






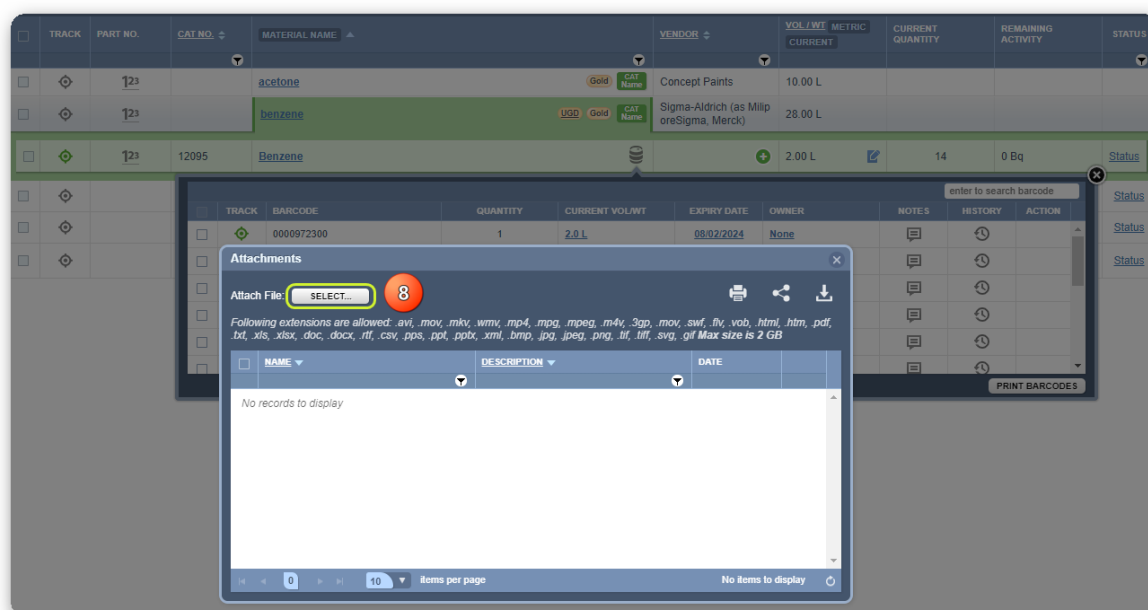
3. Click on the **Sisot** module button from Manifest/Sisot toolbar.





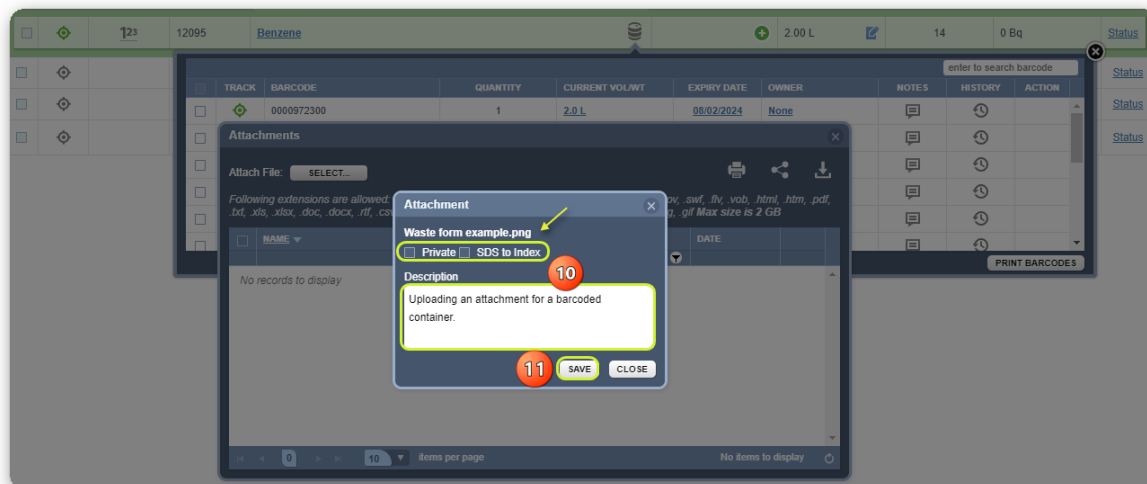
- Click  the **Cat Name** button  from the Cat Name column alongside the product to expand subgrid if the materials column header is set to material name to view the container information.
- Click  on the **Container barrel** icon  alongside the cat name to view the container information in the pop-up window.
- Right click on a barcode identity number of the container to open the **context menu**.



- Click  on the **Attachments** option from the context menu.
- Click  on the **Select** button  to add a file/document. Note that the files must at least have the supported file extension as shown in the screenshot illustrated in the attachments window such as *avi, .wmv, .mp4, .mpg, .mpeg, .swf, .html, .pdf, .txt, .doc, .docx, .rtf, .ppt, .pptx, .xml, .jpg, .png* and many more.





9. Select  the desktop **Source folder** where the file is located.
10. Type a **Description of the file** in the text field. You may use the checkboxes for Private (if uploading private SDS or SDS to Index (if uploading an SDS).
11. Click  the **Save** button to complete the upload process.



12. The uploaded document file name and description provided including the date when the file was uploaded will be displayed in the attachments grid.



13. Select  **Checkbox** alongside file name to **Print**, **Share** (Email) or **Download** the file.
14. Click  on the **file name** from the Attachments grid to render the document on screen.

BACK

TRACK

MANIFEST WASTE FORM

Contact Person

CW Waste ID

W-0002

Street Address

1227 Glen Huntly Rd

Manifest Tracking ID

City

Glen Huntly

Date

29/03/2021 23:02:34

ST ZIP Code

3163

Customer ID

Phone

03 9573 3100

Fax

-

E-mail

Pick Up Site

Waste Contractor

Company Name

Chemwatch

Company Name

Cleanaway

Street Address

1227 Glen Huntly Rd

Street Address

72/80 Harcourt Rd

City

Glen Huntly

City

Altona

ST ZIP Code

3163

ST ZIP Code

3018

Phone

03 9573 3100

Phone

0381996401

US EPA ID

US EPA ID

On Site collection required?

☒ Yes
 ☐ No
 (If NO are you licenced to transport the goods? Refer to local State & Territory Legislation)

Collection Notes

TRANSFER IN

ADD

15. Use the  button to **Close** the Attachments window.

## 2.0 Transfer Process

















HOME | SISOT | TRANSFER PROCESS

This topic will cover the following objectives;

- How to conduct a transfer
- Printing and scanning action barcodes for a transfer
- Requesting for a transfer of a container
- Transferring various containers
- Using the drag & drop function to transfer multiple container(s)

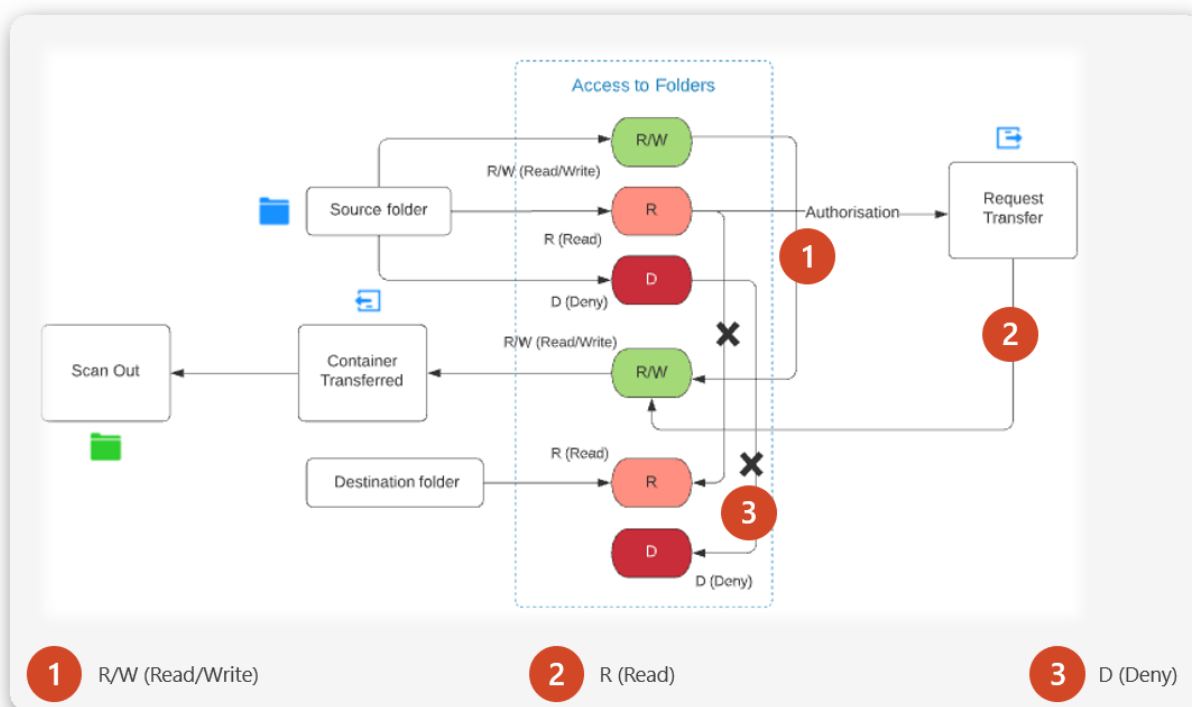


The transfer of containers in Sisot means to either move containers between two storage folders or transferring containers from a shop folder into a storage folder through a store person. The **transfer process** has specific **outcomes** for end users. First; let's look at the end users' folder permissions scenario outcomes for read and read-write. End users with "**Read-write**" access to both the source folder and the destination folder will be able to transfer container from one folder to the other. End users with "**Read only**" access to the source folder and read-write permission to the destination folder will require approval from the source folder owner to conduct the transfer into the destination folder. The table below provides a summary description of the folder permissions and user transfer outcomes.

Folder Permissions in Container Transfers	User Outcome on Folder Permissions	Description
 Read/Write to Read/Write 	 → 	A user with Read/Write access to both original and destination folders can transfer between folders.
 Read to Read/Write 	 → 	A user with Read/Write access to destination folder but only "Read" for the original folder, must go through an approvals process with Sisot Approver who has Read/Write access to that original folder.
 Read/Write to Read 	 ✕ 	Transfer process cannot occur for users with Read/Write to source folder but only Read access to destination folder.
 Read to Read 	 ✕ 	Transfer process cannot occur for users with Read access to both source folder and destination folder.

## 2.1 How to Conduct a Transfer

The following transfer flow summarises the folder permissions related to transferring containers where the transferer (requester) and the receiver (approver) both have read-write folder permission to storage folders (i.e., the source folder & the destination folder).




In this exercise, the end user has been granted “read-write” permission to both source folder and destination folder. Note that the end user will not require any approval to conduct the transfer from one folder to another due to the type of permission granted on those folder locations.

**Source folder** – this is the folder in which the transfer of the container comes from (which is the folder location where the product container is stored).



**Destination folder** – this is the folder in which the product container is going to be transferred to once the transfer process is complete.

There are **three Options** available for the transfer process within the Sisot mode.


### Option 1: Print Action Barcodes and Scan the barcodes to transfer the containers

Users can print the action barcodes and use a scanner to scan the individual container barcode (s) into the required quantity field before adding those containers into the transfer cart through the action container cart icon .

## Option 2: Enter the specific number of containers in the “Required Quantity” field to transfer


Users can also enter or type the required quantity (number) of containers and then click  on the action container cart icon  in order to add containers into the transfer cart.

## Option 3: Drag and Drop multiple containers to transfer them at a go into a destination folder/location.





Users can also use the checkboxes to mark multiple containers to be transferred into another destination folder/location by drag and drop. However, each container quantity must be specified and then added into the transfer cart by using the action container cart . In this topic, all these transfer options are illustrated in the following subsections.

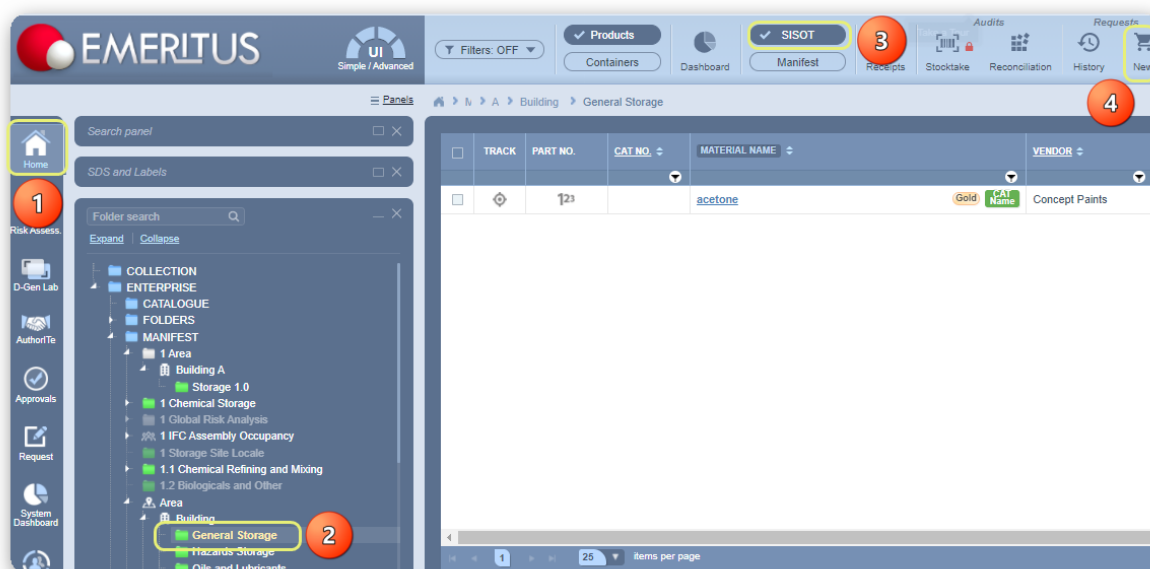
### 2.1.1 Print and Scan Action Barcode to Transfer



#### Option 1: Print Action Barcodes and Scan the barcodes to transfer the containers

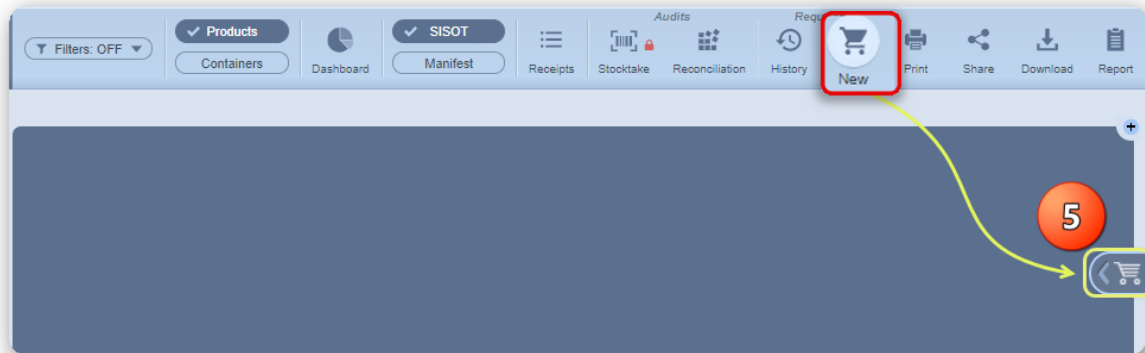
Users can print the action barcodes and use a scanner to scan the individual container barcode (s) into the required quantity field before adding those containers into the transfer cart through the action container cart icon . A scanner is required to submit the transfer!

#### Steps: Transfer containers from source folder to a destination folder




1. Select  the **Home** module button .
2. Select  a **folder** under the Manifest directory.
3. Click  on the **Sisot** button from Sisot toolbar.
4. Select the **New Request** button from the Sisot toolbar.







- Click  on the “Transfer Cart” slide panel icon  on the right-hand side mid area of the user interface

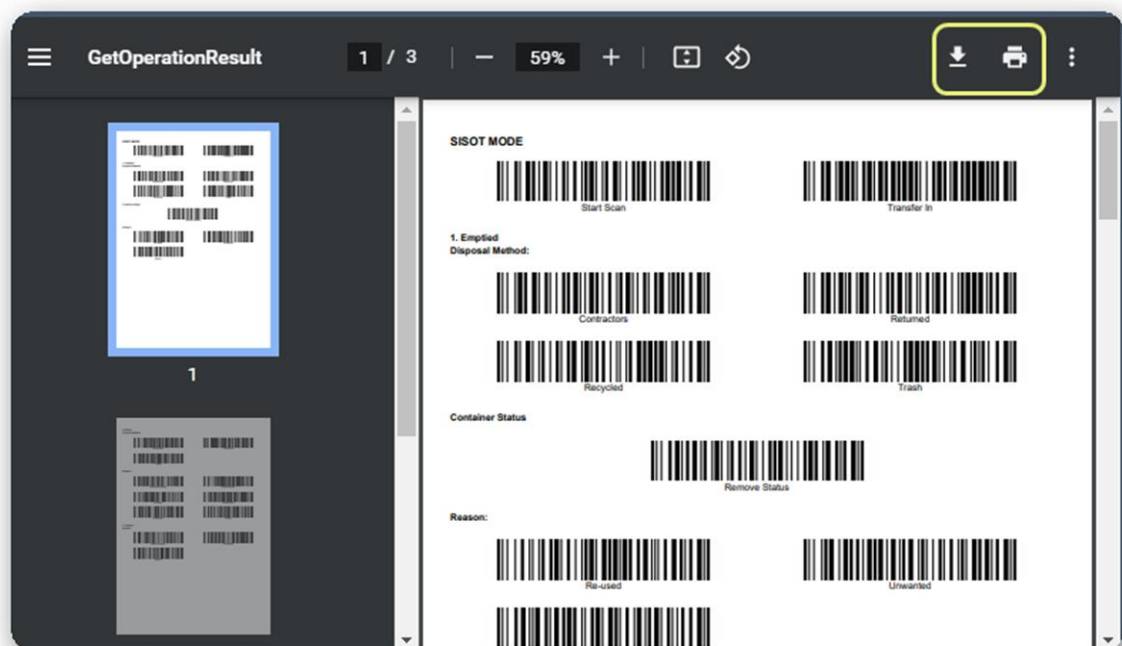







- Select  the Source folder .

 Notice the Transfer Cart Source folder name will display on slide panel. Users shall be able to see the inventory list of the source folder and transfer cart in Sisot mode and can add containers into the transfer cart. Click  on hibernate cart icon  to temporarily close the slide panel.

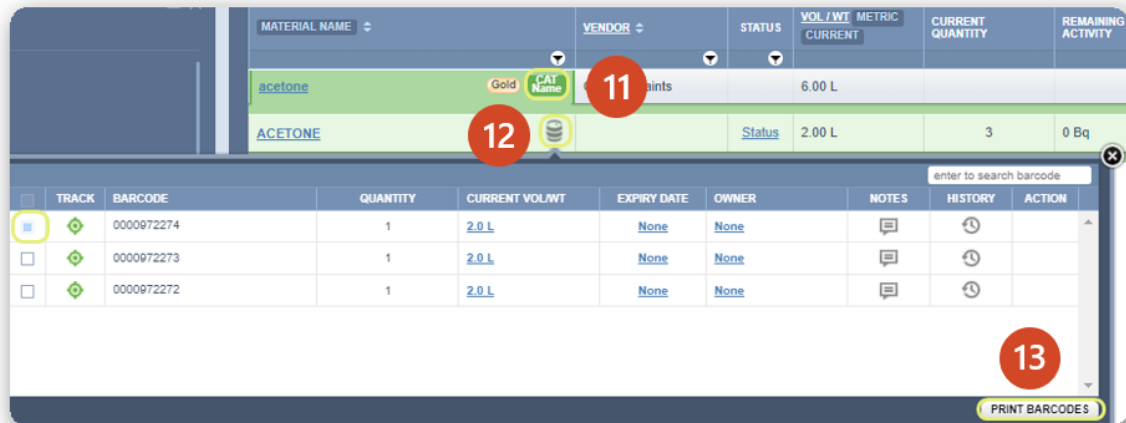


- Use the **action barcode and scanner** for adding containers into the transfer cart, click  the **Print** button.
- Select  the **Action Barcodes for Sisot Mode** from the print menu checkbox
- Click  on the **New Request Mode** checkbox.
- Click  the **Submit** button to print the Sisot mode action barcodes. Close the print window.

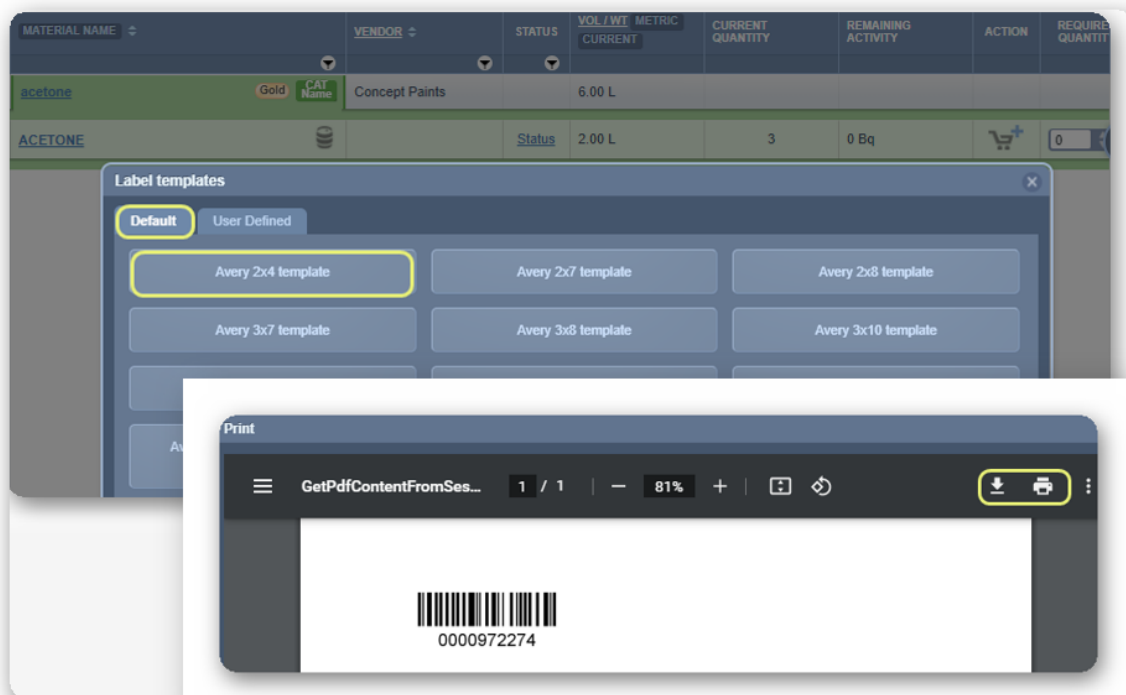


11. Click  the **Cat Name**  to expand row for the product.
12. Press the container icon  alongside the respective *Cat Name and Vendor* to open container barcode information window.
13. Press  the **Print Barcodes** button. Use the label gallery to choose a label  template.





Print container barcodes for the product(s).



- Scan the Action Barcode, **Start Scan** on the Sisot Action Barcode list. A message "*Scan mode is activated*" is then displayed on the top middle of the user interface to show status of the action undertaken.

**SISOT MODE**

**Container Status**

Start Scan

Remove Status

**1. Emptied Disposal Method:**

Contractors

Returned

Recycled

Trash

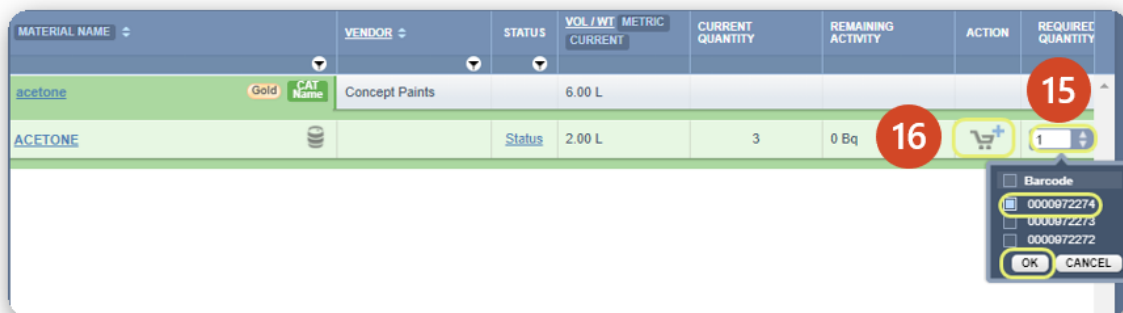
**Reason:**

15. Scan the printed barcodes for all the container(s). Notice the number of containers will automatically be displayed in the “Required Quantity” filed.



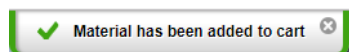
In absence of a scanner, users can manually assign the barcodes by simply entering the number of containers in the cart text filed for “Required Quantity” value to add those respective containers (with barcodes) into the Transfer Cart. Use the Add Cart icon to view the list of available barcodes to be used for the transfer. In this example below, the manual addition of barcodes is shown as well. Ensure to enter the required quantity value to match the exact number of barcodes selected. If this required quantity value does not match the number of selected barcodes, the message will be displayed.

The number of selected barcodes does not match the required quantity
✕



16. Once scanning barcode(s) is completed, click on **Add to Cart** icon .

Once the required container quantity has been added to the Transfer Cart, a confirmation message confirms action.

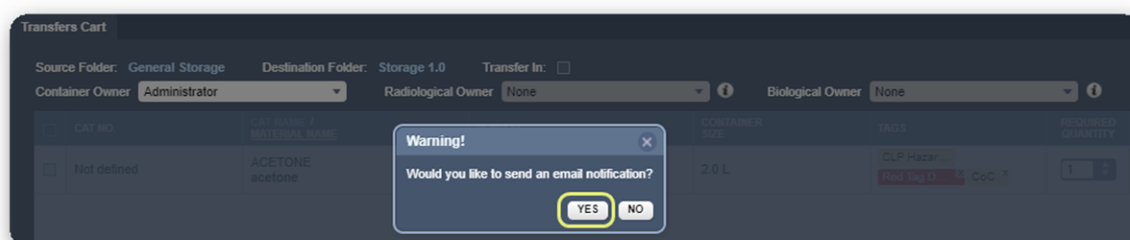


17. Click on the **Transfer Cart** icon slider to open the cart information panel.

18. Select the **Destination folder**, where the containers are to be added.

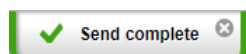
19. Click the **Container Owner** drop-down arrow to assign user.

If container owner is not assigned from the transfer cart, a message will display to confirm “**Yes**” to send a notification to folder owner for receipts or “**No**” to decline.



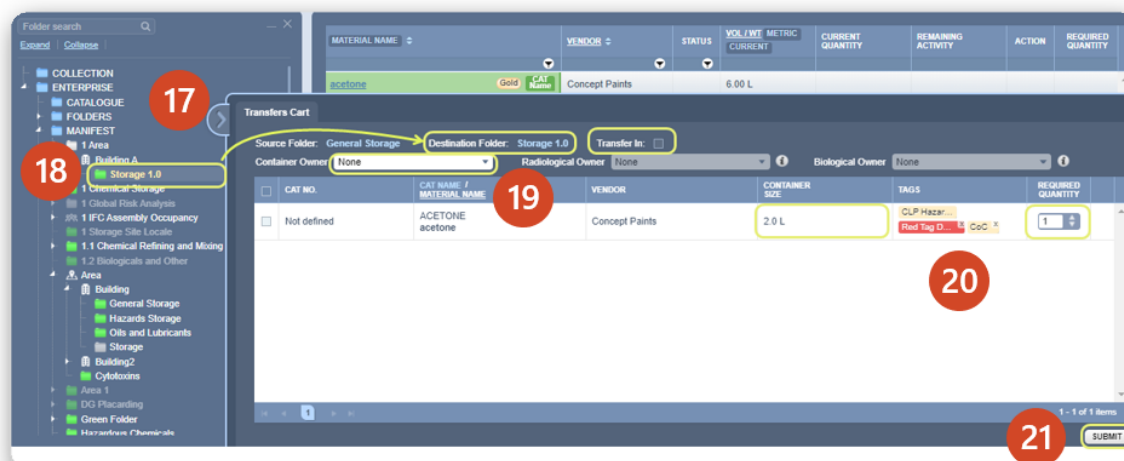
20. Click the **Send** button to send an email notification. A send complete message displays on the user interface to confirm email has been sent.

The recipient will receive a notification email pertaining to the pending transfer. A confirmation message display on the user interface. The Transfer Cart slide panel is retained empty after the submission



21. Check if the **container size** and **required quantity** is correct.

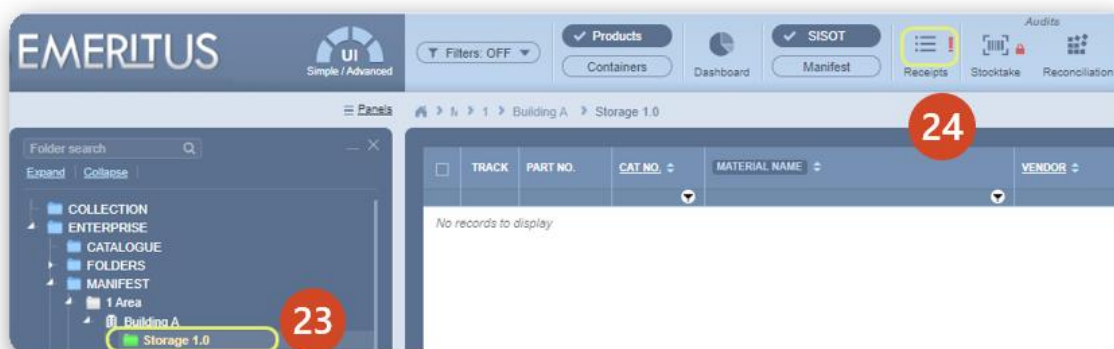
22. Click the **Submit** button to submit the transfer cart.



23. **Deactivate** the **New Request** mode by clicking the highlighted “New Request” button within the Sisot toolbar.

*i* Notice that the Receipts button will display an “Exclamation mark” for pending receipts. The next stage of the transfer process is to accept the pending receipts into the destination folder. Recall which type of transfer outcomes are possible based on user permissions.

24. Select the **Destination folder**.
25. Click **Receipts** mode button on the Manifest/Sisot Toolbar to activate receipts



26. Receipts mode defaults to the **Transfer** tab, which the transfer details are provided in the following columns: the request ID for the transfer, request date, requester, cat name, container size, requested quantity, transfer quantity, compatibility, barcodes. Press the folder location with the exclamation mark for receipts.

Receipts

Expand Collapse

Building A > Storage 1.0

Transfer Shop

IN / PENDING

FROM	REQUEST ID	REQUEST DATE	REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY
	T-0057	29/06/2021 02:31	Administrator		Not defined	ACETONE acetone	Concept Paints	2 L	1

25

26

SCAN IN ACCEPT DECLINE

27. Press the Scan In button.

28. Scan the container barcode(s) or type the barcode number & press enter on your keyboard.

Use the Action Barcodes option to activate Transfer In.

Scan the Container Barcode

**Hint:** The received quantity value in the In/Pending tab will increase from 0 to 1, etc., depending on the number of containers scanned versus the requested quantity.

0000972274

NEW REQUEST MODE

Transfer

Start Scan

Submit

Transfer In

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BAR
ACETONE acetone	Concept Paints	2 L	CLP Hazar... Red Tag D... CoC	1	1	1	✓	0

SCAN IN ACCEPT DECLINE

29. Check the Received Quantity for the scanned item and its compatibility.

30. Select the Accept button.

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BAR
ACETONE acetone	Concept Paints	2 L	CLP Hazar... Red Tag D... CoC	1	1	1	✓	0

28

29

SCAN IN ACCEPT DECLINE

31. Press the 'Yes' button to accept any maximum volume exceeded.

Max volume exceeded

The set volume has exceeded the maximum for this material.

Do you want to set this new value as the new maximum volume?

ACETONE

30

YES CANCEL



**Hint:** If 'Yes' is selected, this action will set the new value as the maximum volume/weight. The folder exclamation mark for the receipt will disappear confirming the successful transfer in folder action.

32. Press the **InHistory** tab to confirm successful transfer for requested quantity, transferred quantity and received quantity.

IN HISTORY								REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY
FROM	REQUEST ID	REQUEST DATE	DATE RECEIVED	REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE		
T-0057	29/06/2021 02:31	29/06/2021 11:05	Administrator		Not defined	ACETONE acetone	Concept Paints	2 L	1	1

## Useful Tools in Receipts Mode

Receipts can also be tracked to the specific folder/location within the folder tree structure. Note that the tree structure will also show the red exclamation mark to highlight the pending receipts in respective folder/location.

Click  the **Track** icon  alongside a transfer request ID to locate folder location.

Receipts

Expand Collapse



Transfer Shop

IN / PENDING

FROM REQUEST ID REQUEST DATE REQUESTOR CAT NO. CAT NAME / MATERIAL NAME VENDOR

T-0048 24/09/2020 13:47 Administrator

1 Area  
1 Chemical Storage  
1 Global Risk Analysis  
1 IFC Assembly Occupancy  
1 Storage Site Locale  
1.1 Chemical Refining and Mixing  
Huntingwood  
Warehouse1

Click  the **Expand** arrow  for **In/Pending** Receipts to display the respective Transfer ID (T-XXXX) row details, where T-XXXX-is the transfer identification number; e.g., T-0037.

Transfer Shop													
IN / PENDING													
FROM	REQUEST ID	REQUEST DATE	REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BAR
T-0037	05/02/2019 16:44	Administrator			trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC	1	1	0	×	0
T-0036	05/02/2019 17:48	Administrator			acetone	3M	10 L	CLP Hazar... Red Tag D... CoC	3	3	0	✓	Multi
					Thinner acetone	ChemTools	10 L	CLP Hazar... Red Tag D... CoC	1	1	0	✓	Multi

The barcodes column provides the barcode identity number for the initiated container transfer.

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC x	1	1	0	×	<input type="checkbox"/> 0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								
acetone	3M	10 L	CLP Hazar... Red Tag D... CoC x	3	3	0		<input type="checkbox"/> 0000972161 <input type="checkbox"/> 0000972160 <input type="checkbox"/> 0000972159
Thinner acetone	ChemTools	10 L	CLP Hazar... Red Tag D... CoC x	1	1	0	✓	<input type="checkbox"/> 0000972066
SCAN IN ACCEPT DECLINE								

### Temporarily Hide Receipts Columns

Note that with the “mouse right click” on any of the column area of the user interface provides a list of columns to temporarily hide from the grid. Simply uncheck the box (es) to hide columns or check a box to show column.


REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	Columns	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
Administrator			<input checked="" type="checkbox"/> From <input checked="" type="checkbox"/> Request ID <input checked="" type="checkbox"/> Request <input checked="" type="checkbox"/> Date <input checked="" type="checkbox"/> Requestor <input checked="" type="checkbox"/> Cat No. <input checked="" type="checkbox"/> Cat Name / Material Name <input checked="" type="checkbox"/> Vendor <input checked="" type="checkbox"/> Container Size <input checked="" type="checkbox"/> Tags <input checked="" type="checkbox"/> Requested Quantity <input checked="" type="checkbox"/> Transferred Quantity <input checked="" type="checkbox"/> Received Quantity <input checked="" type="checkbox"/> Compatibility <input checked="" type="checkbox"/> Barcodes						
Administrator		trichloroethane 1,1,1-trichloroethane	Merck	CLP Hazar... Red Tag D... NZ Regs CoC x	1	1	0	×	<input type="checkbox"/> 0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE									
Administrator		acetone	3M	CLP Hazar... Red Tag D... CoC x	3	3	0	✓	Multiple
		Thinner acetone	ChemTools	CLP Hazar... Red Tag D... CoC x	1	1	0	✓	<input type="checkbox"/> 0000972066
SCAN IN ACCEPT DECLINE									

### Compatibility Check

The receipts provide a Compatibility check ✓ before the containers are added to the destination folder for the folder owner/requester to confirm or check compatibility requirements with existing containers. If the container that is being transferred does not meet the compatibility compliance, a red cross will be displayed instead of a green tick ✓.

CAT NAME / MATERIAL NAME		CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC x	1	1	0	×	0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								
acetone	3M	10 L	CLP Hazar... Red Tag D... CoC x	3	3	0	✓	Multiple
Thinner acetone	ChemTools	10 L	CLP Hazar... Red Tag D... CoC x	1	1	0	✓	0000972066
SCAN IN ACCEPT DECLINE								

### Cat Name/Material Name Header drop down option

The Cat Name/Material Name header can be used to view the requested items in either **Cat Name** or **Material Name** view. If Cat Name is the selected header, then Cat Name only will be displayed in grid and vice versa will also apply for Material Name. Click  on either options to display the desired name type.

#### Cat Name View

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC x	1	1	0	×	0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								



#### Material Name View

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
1,1,1-trichloroethane trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC x	1	1	0	×	0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								







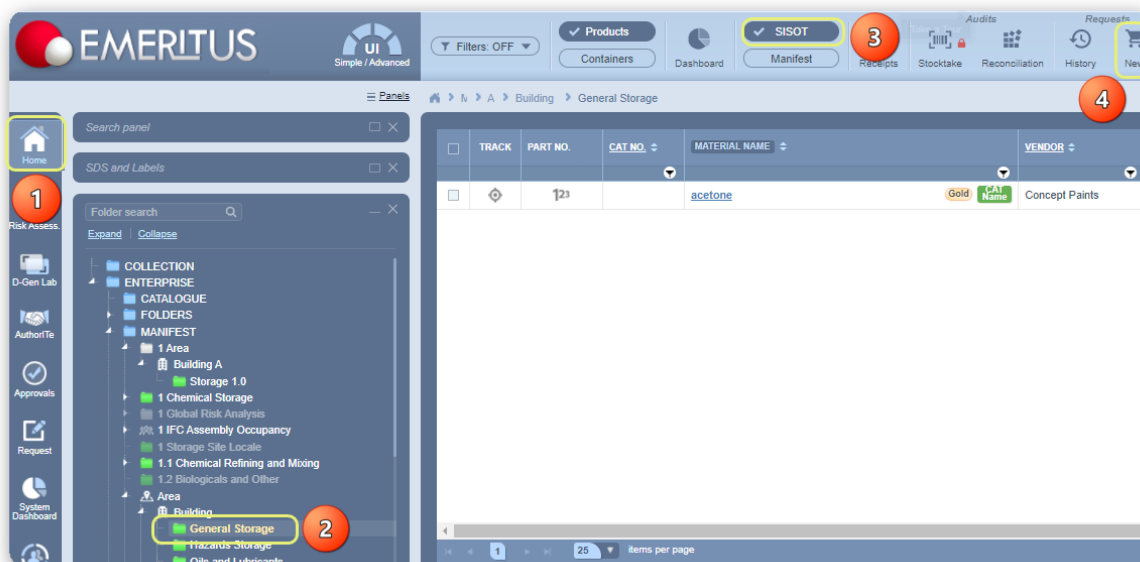
## 2.1.2 Transfer Several Containers



**Option 2:** Enter the specific number of containers in the “Required Quantity” field to transfer

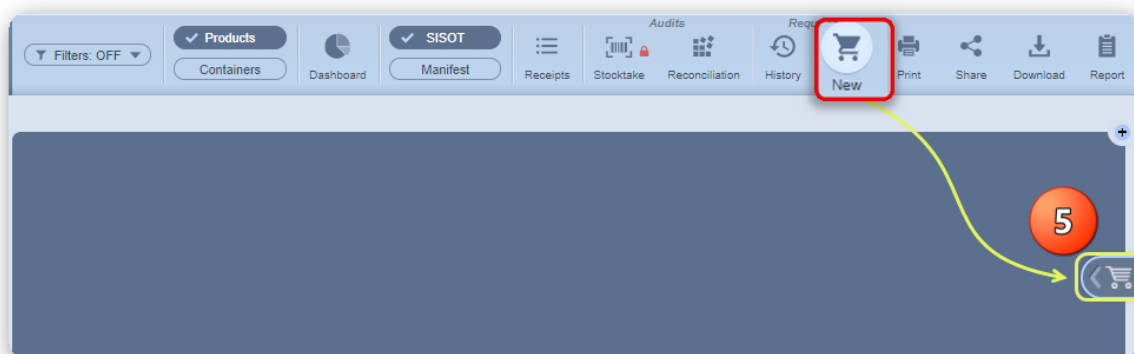
Users can also enter or type the required quantity (number) of containers and then click  on the action container cart icon  in order to add containers into the transfer cart. A scanner is not required to submit the transfer!

**Steps:** Enter or type number of container and submit the transfer

1. Select  the **Home** module button .
2. Select  a **Folder** under the Manifest directory.
3. Click  on the **Sisot** button from Sisot toolbar.
4. Select  the **New Request** button from the Sisot toolbar.












5. Click  on the **Transfer Cart** slide panel icon  on the right-hand side mid area of the user interface.



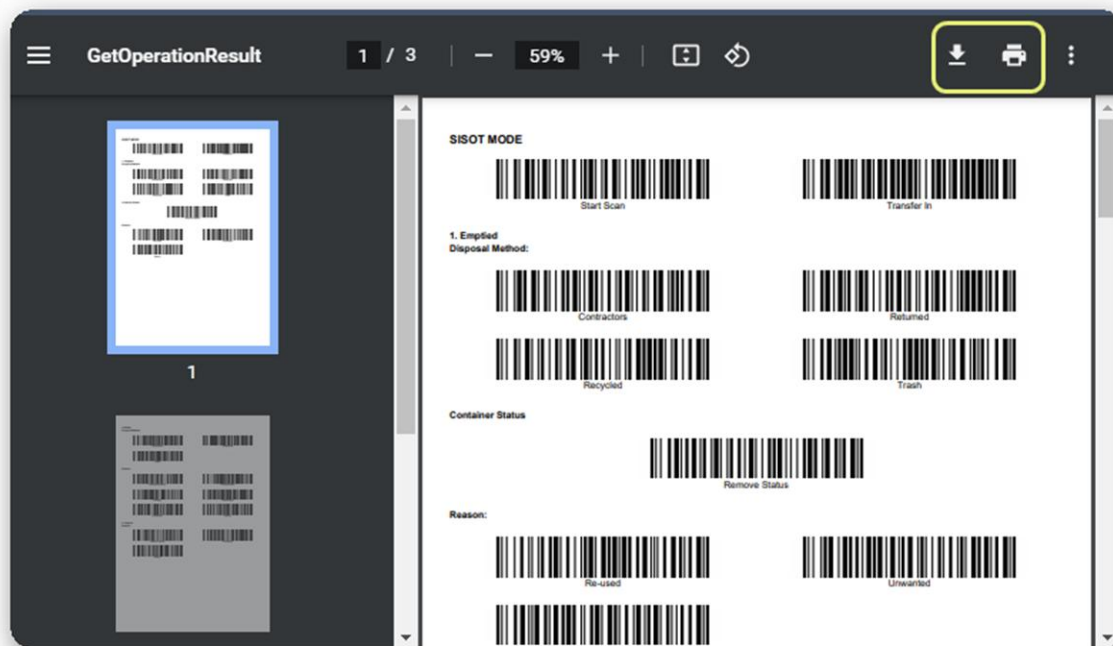
6. Select  the **Source Folder** .

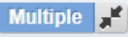




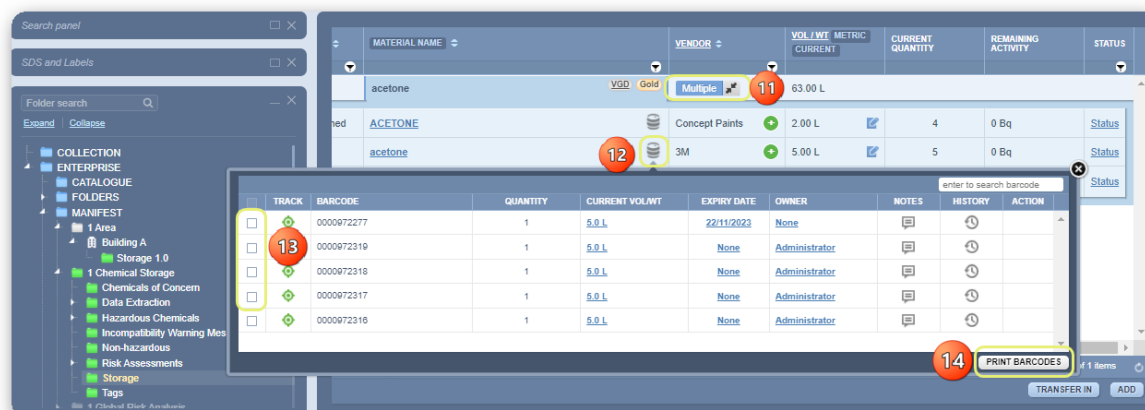
**i** Notice the Transfer Cart Source folder name will display on slide panel. Users shall be able to see the inventory list of the source folder and transfer cart in Sisot mode and can add containers into the transfer cart. Click  on hibernate cart icon  to temporarily close the slide panel.


7. Users can manually type the number of containers to be transferred into another folder/location. Click  the **Print** button.
8. Select  the radio button  option **Action Barcodes** from the print menu
9. Click  on the **Sisot mode** checkbox  **SISOT Mode**
10. Click  the **Submit** button  to print the Sisot mode barcodes

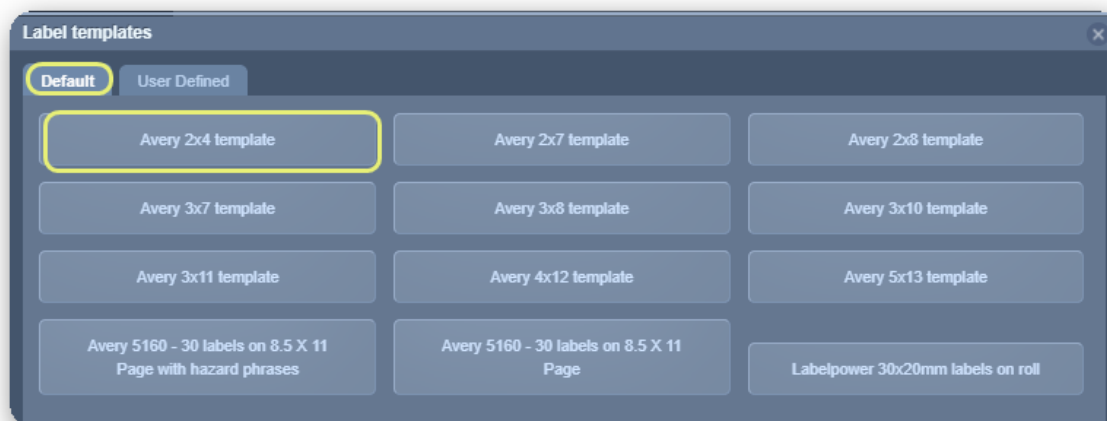




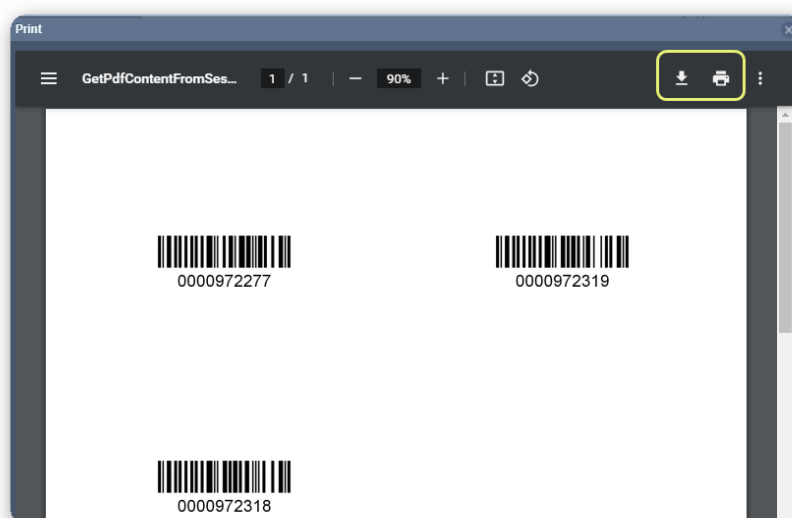
11. Click  the **Multiple** button to expand row for the product line item.
12. Press the **Container** icon  alongside the respective Cat Name and Vendor.
13. Select ☐ the **barcode(s) checkbox(es)** to print respective barcode(s).
14. Press ☐ the **Print Barcodes** button  as the barcodes will be required when scanning the label barcodes for those items into the destination folder.



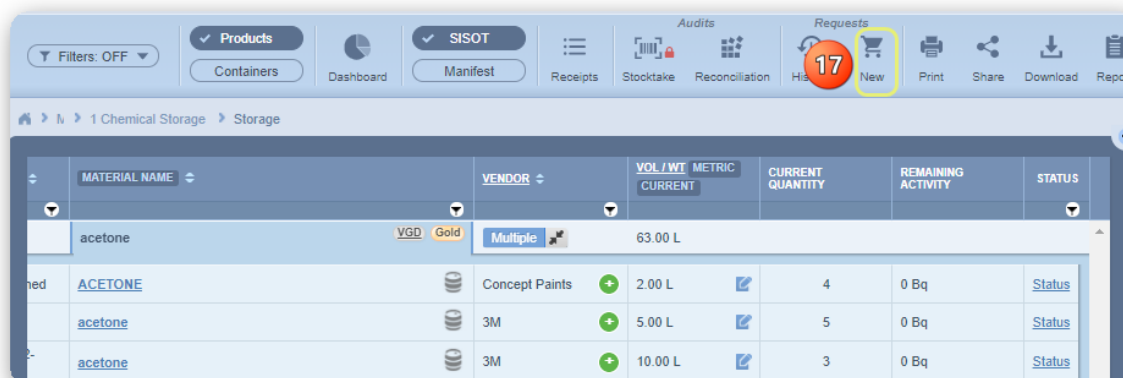
15. Press ☐ the **Label Format and Size**  from the label gallery panel to print. Note that the label gallery defaults to the Chemwatch default templates.





16. Click  **Print** or Download button from the PDF document viewer. Close the Print and Label templates windows to go back to the Products grid.

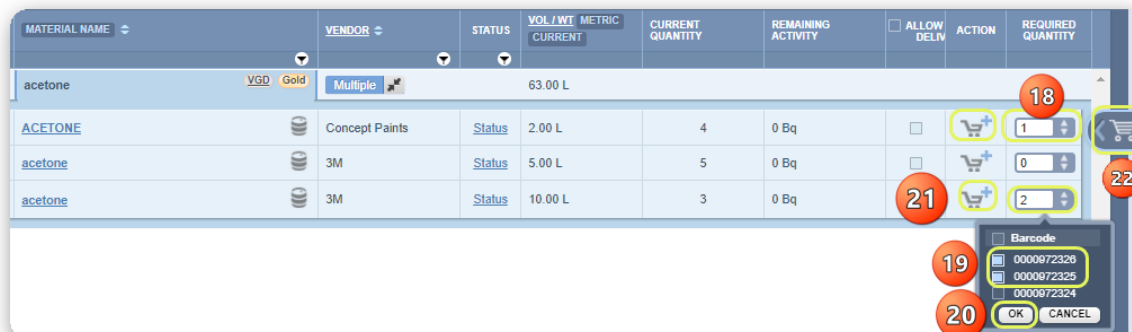


17. Click  the **New Request** button from the Sisot toolbar.

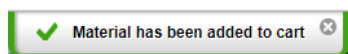


18. Type the **Required Quantity** number in the respective field or simply use the upward arrow.
19. A **Barcode panel** will display the list of container barcodes. Click  the **checkbox(es)** to select the barcodes to be submitted into the transfer cart.

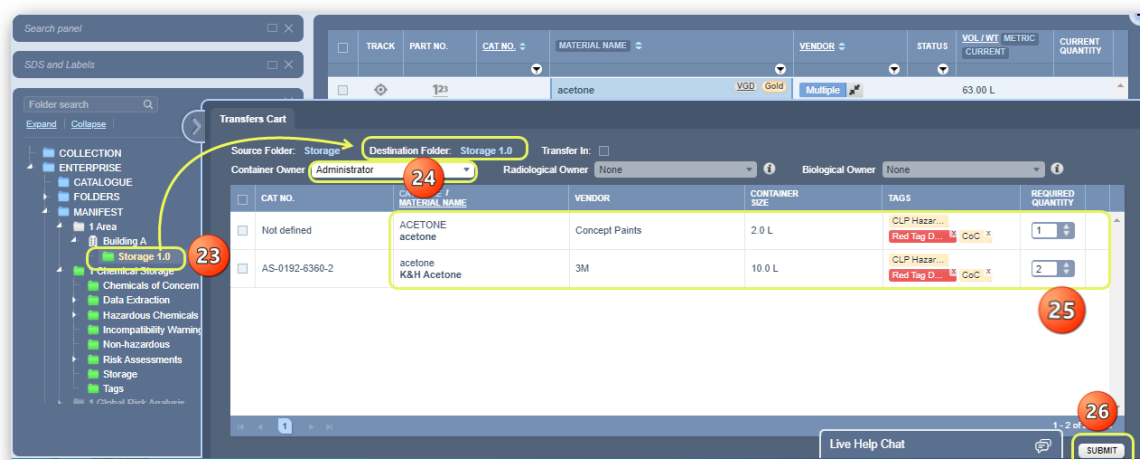
20. Click the **OK** button on the barcode pop up panel.
21. Click the **Add to Cart** icon  alongside the required quantity for the item.
22. Click on the **Transfer Cart** icon to open the slide panel.



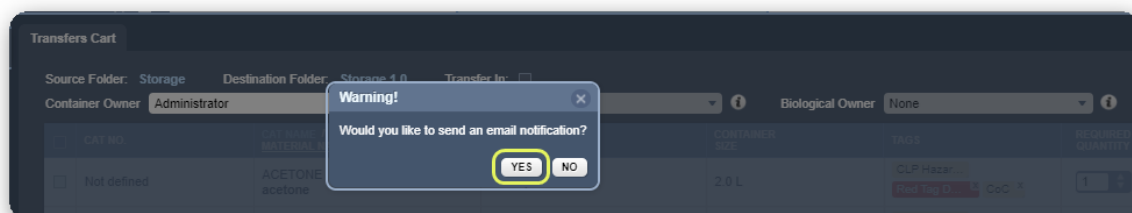
A confirmation message displays **Material has been added to Cart**.



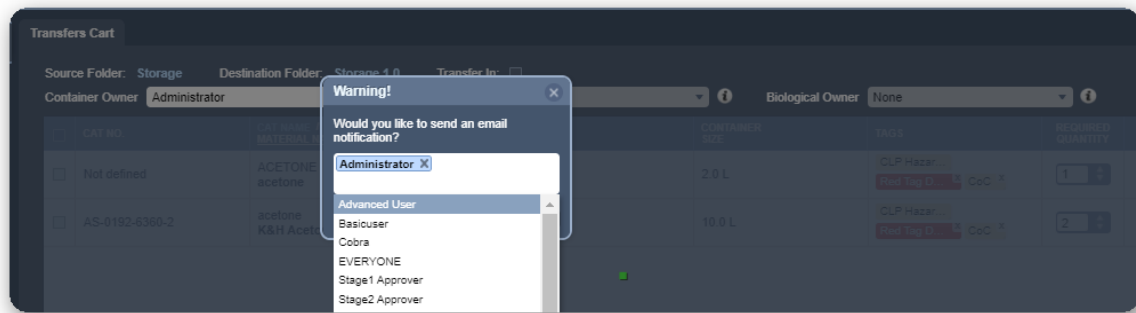
23. Select the **Destination Folder** where the containers are to be transferred.
24. Select the **Container Owner** from the drop-down list of users.
25. Confirm the cat name(s), container size, vendor and **Required Quantity** for the transfer.
26. Click the **Submit** button to submit the transfer.




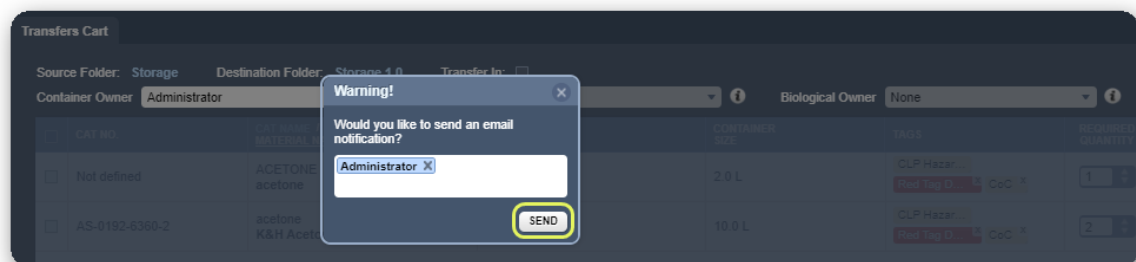
27. Confirm **Yes** to send a notification to folder owner for receipts or simply decline by pressing the **NO** button.



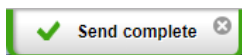
28. Select **User** from the drop-down list.



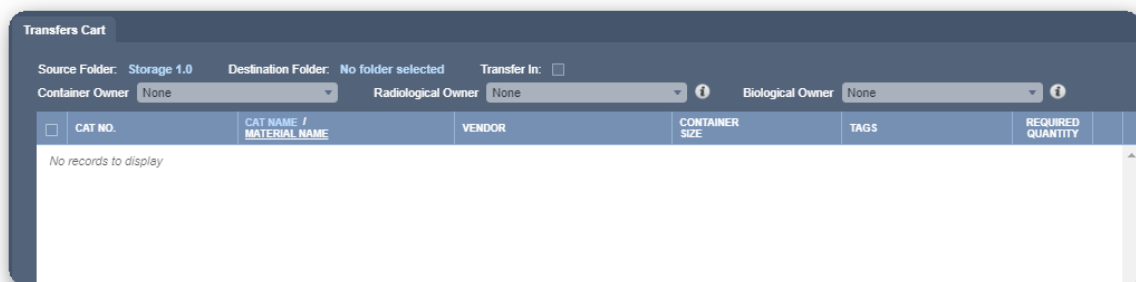
29. Click  the **Send** button to send an email notification. A send complete message displays on the user interface to confirm email has been sent.



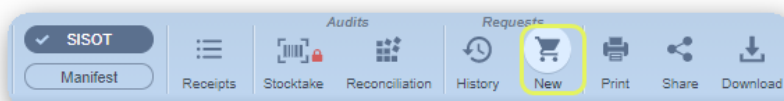
The recipient will receive a notification email pertaining to the pending transfer. A confirmation message display on the user interface.



The Transfer Cart slide panel is retained empty after the submission with no records to display.

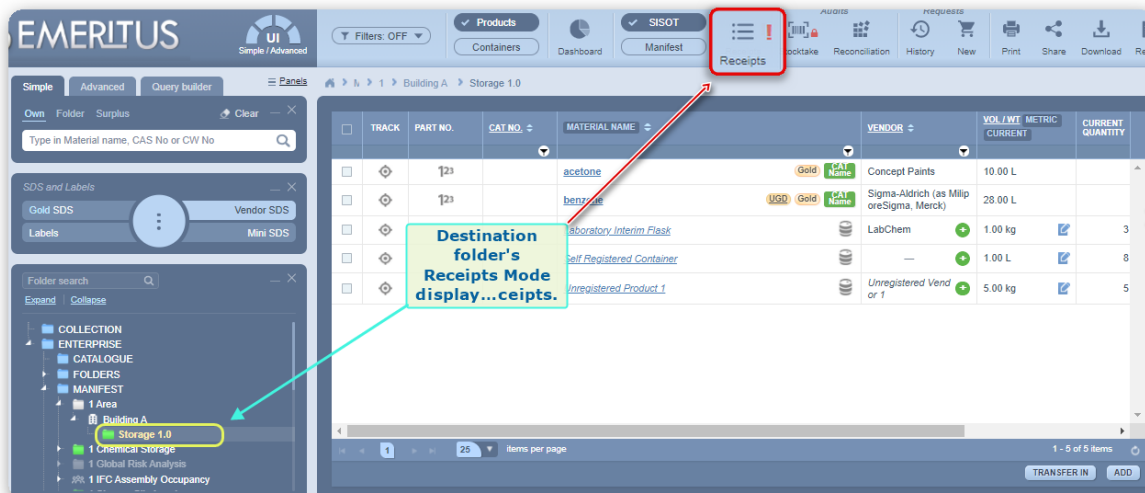


30. **Deactivate** the **New Request** mode by clicking  the highlighted New Request button.



The **next stage of the transfer process** is to scan and accept the **Pending Receipts** into the destination folder using the **Receipts Mode**.

Notice that the Receipts button will display an “Exclamation mark” for pending receipts. The next stage of the transfer process is to accept the pending receipts into the destination folder. Recall which type of transfer outcomes are possible based on user permissions.



Go to the [Receipts Mode in Section 4](#) to learn about the Receipt's Mode and how to use it to scan and accept transfers into the destination folder that contains pending receipts. The next topic delves on how to use the drag & drop function to transfer container(s) from a source folder into a destination folder.

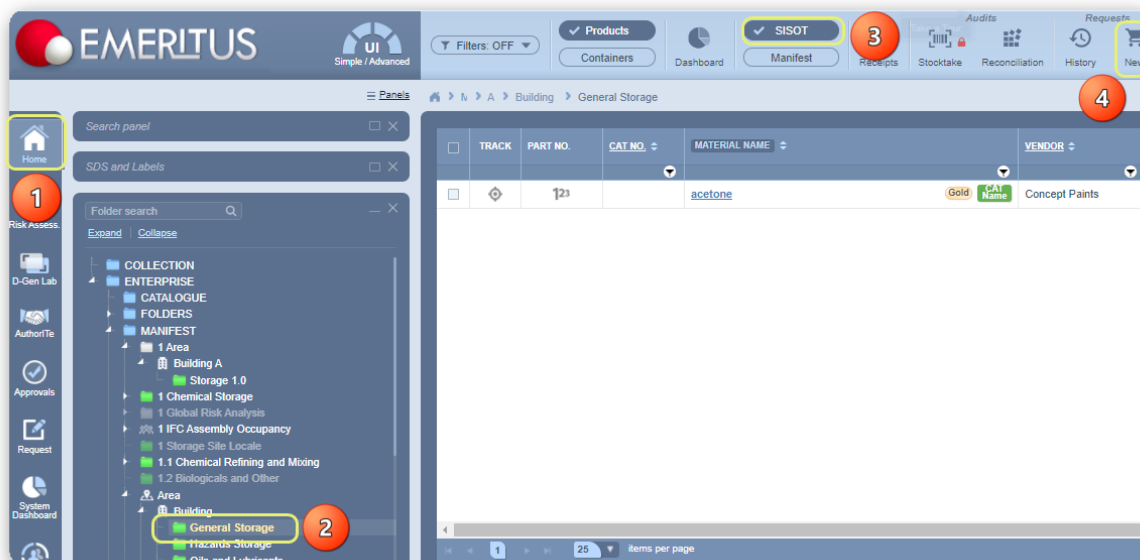
### 2.1.3 Drag and Drop Multiple Containers to Transfer


**Option 3: Drag and Drop multiple containers to transfer them at a go into a destination folder/location.**

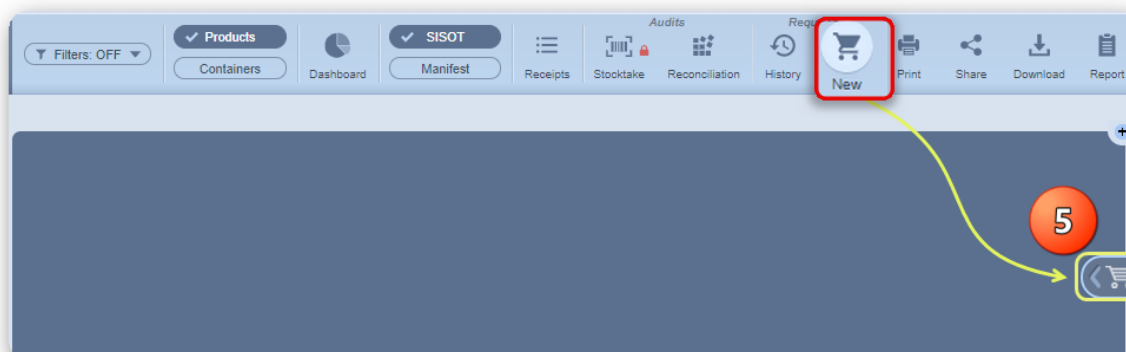
Users can also use the checkboxes to mark multiple containers to be transferred into another destination folder/location by drag and drop. In this topic, this transfer option is illustrated in the following steps.

**Steps: Transfer containers from source folder to a destination folder**

1. Select the **Home** module button.
2. Select a **Folder** under the Manifest directory.
3. Click on the **Sisot** button from Sisot toolbar
4. Select the **New Request** button from the Sisot toolbar.



- Click on the **Transfer Cart** slide panel icon  on the right-hand side mid area of the user interface.










- Click the **Source folder** .



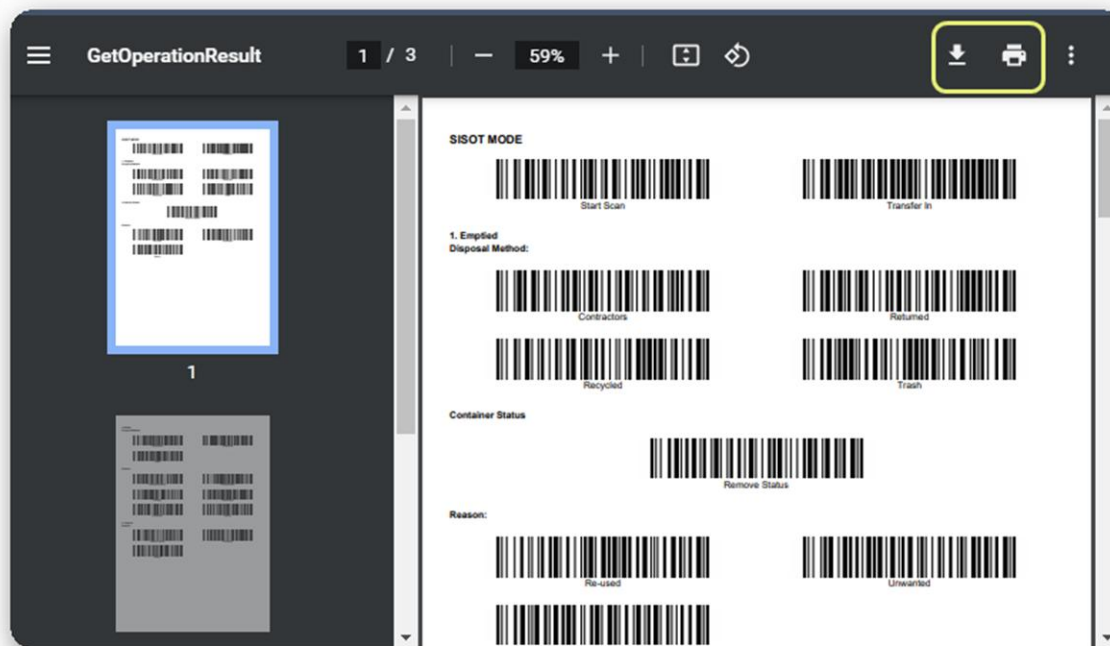


At this stage of the process, users will have to decide which **Action** to undertake from the **3 Options** for transferring containers. In this example, the drag and drop function is used to transfer containers into another folder/location.

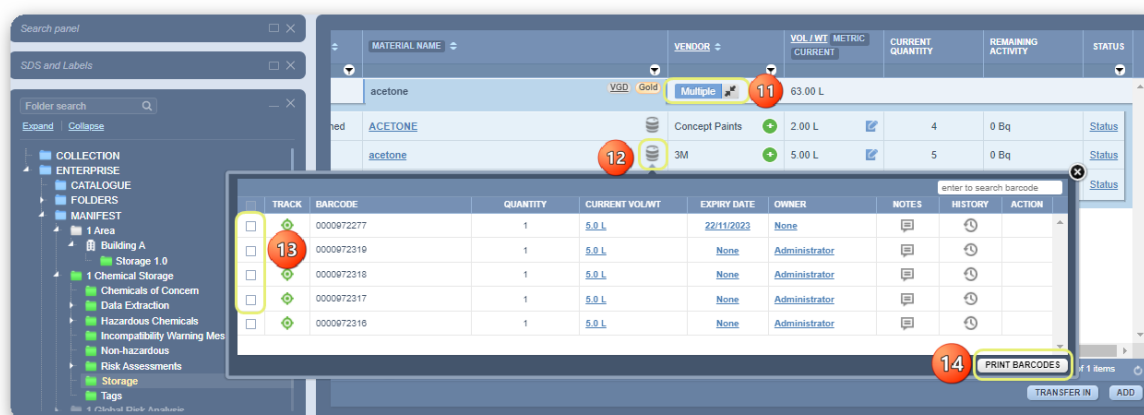
7. Users can manually type the number of containers to be transferred into another folder/location. Click  the **Print** button.
8. Select  the radio button  option **Action Barcodes** from the print menu.
9. Click  on the **Sisot mode** checkbox  **SISOT Mode**.
10. Click  the **Submit** button  to print the Sisot mode barcodes.



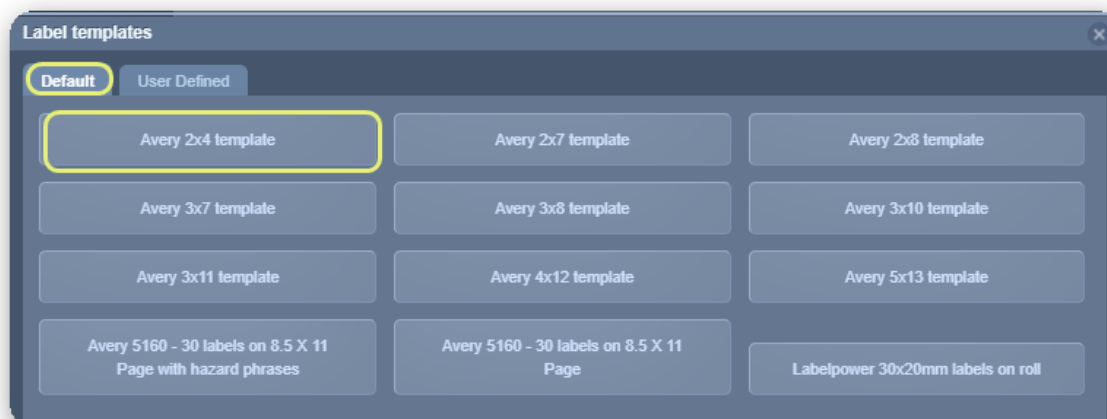
Use the PDF document viewer to print the respective action barcodes.





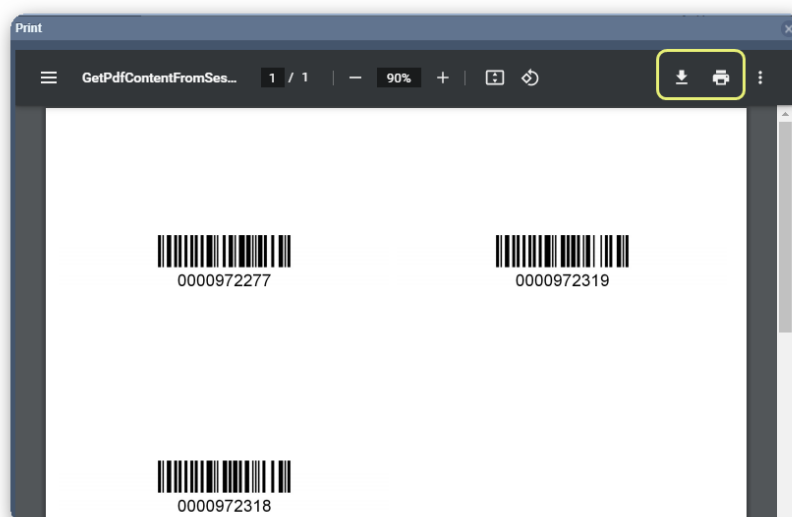
11. Select the **Multiple** button to expand the row to view product Cat Name(s).
12. Click on the **Container icon** to display a list of barcodes for the container(s). Note that the label barcode will be used later when accepting the transfer in the Receipts mode.
13. Select the barcode **Checkbox(es)** ☐ alongside the barcode item to be transferred.
14. Click the **Print Barcodes** button to print the respective container barcode label.



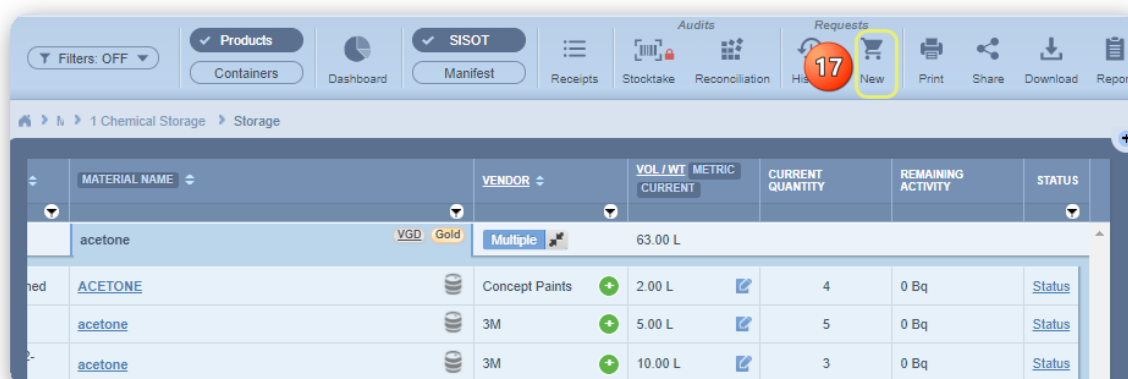
15. Select the **Label template** name from the label gallery





16. Click  the **Print** or Download button from the PDF document viewer. Close  the Print and Label template windows to go back to the Products grid.

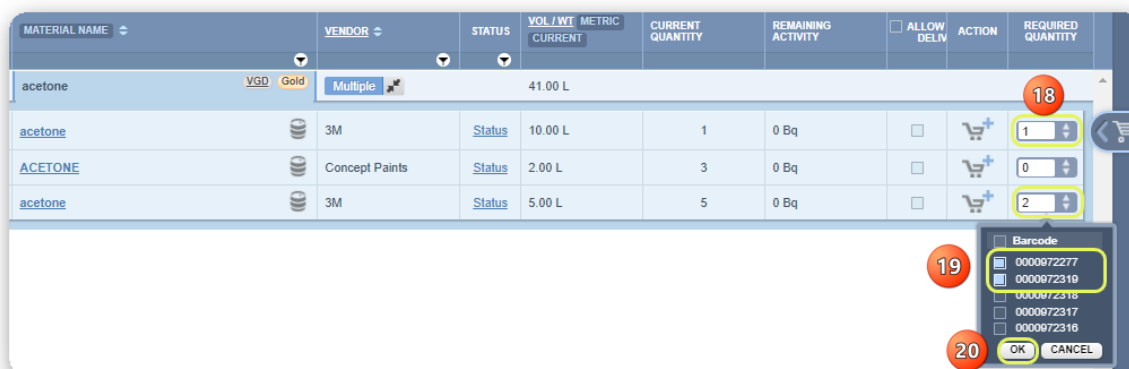


17. Click  the **New Request** button from the Sisot toolbar.

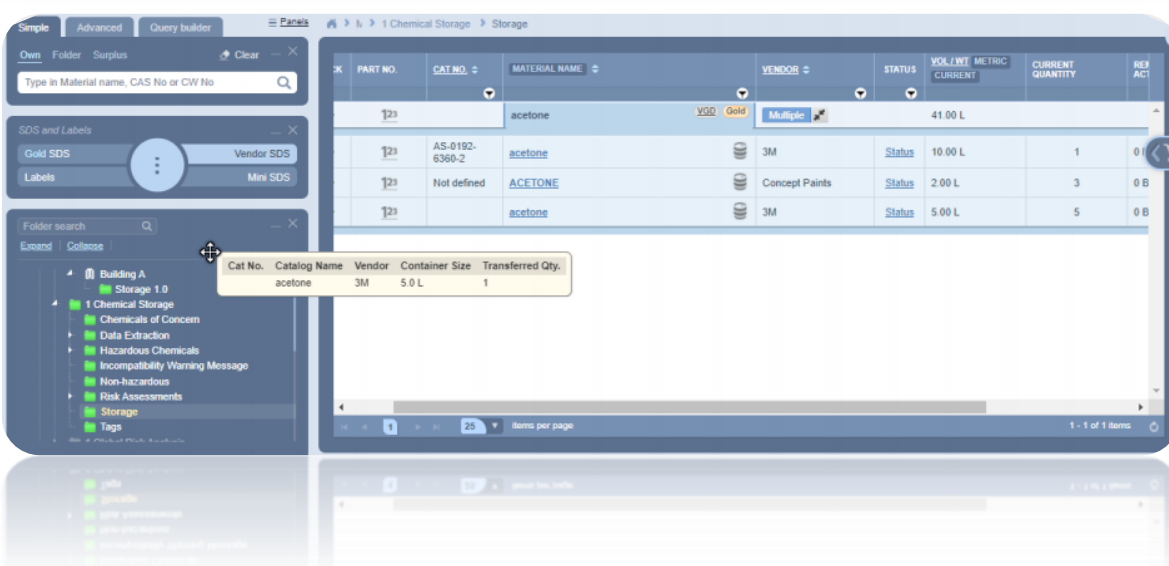
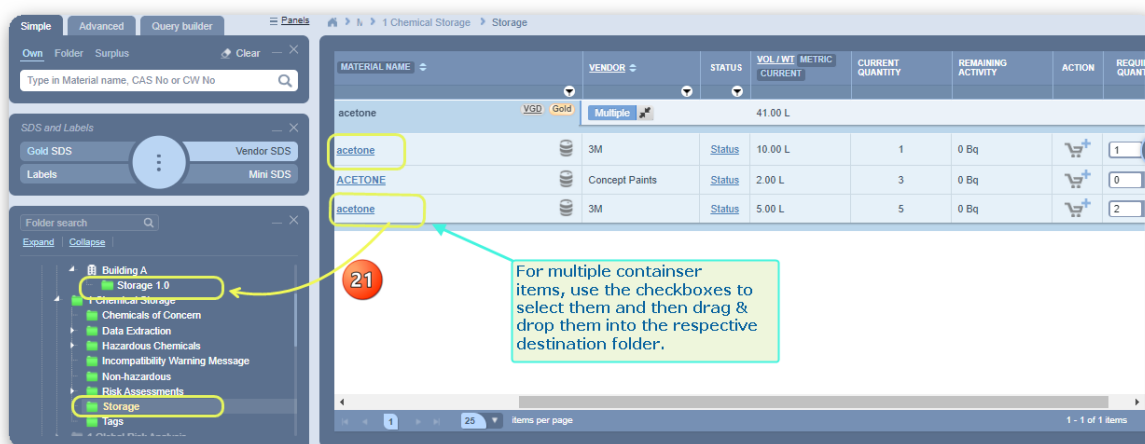


18. Type the **Required Quantity** number in the respective field or simply use the upward arrow.
19. A **Barcode panel** will display the list of container barcodes. Click  the **checkbox(es)**  to select the barcodes to be transferred.

20. Click the OK button on the barcode pop up panel.

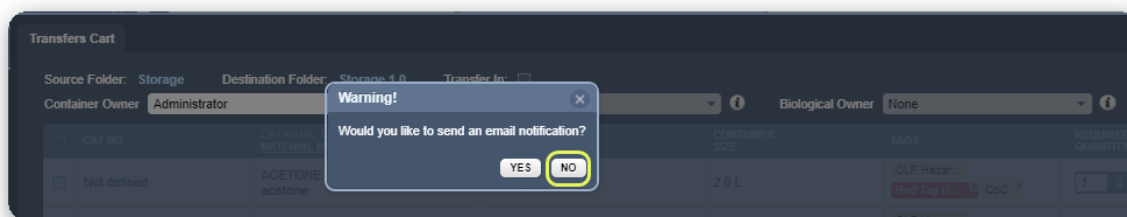


21. Drag and drop the Cat Name(s) in the expanded row onto the destination folder/location to transfer the item.



22. Confirmation message displays "Material Added to Cart". Select the Yes/No button to confirm warning message to send/not to send email.

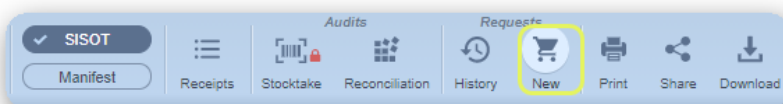
If yes is selected, then choose the user and confirm to continue. In this case, “No” is selected **not to send an email** notification since the user transferring the item has read-write permission to both source and destination folders.



Send complete message is displayed.

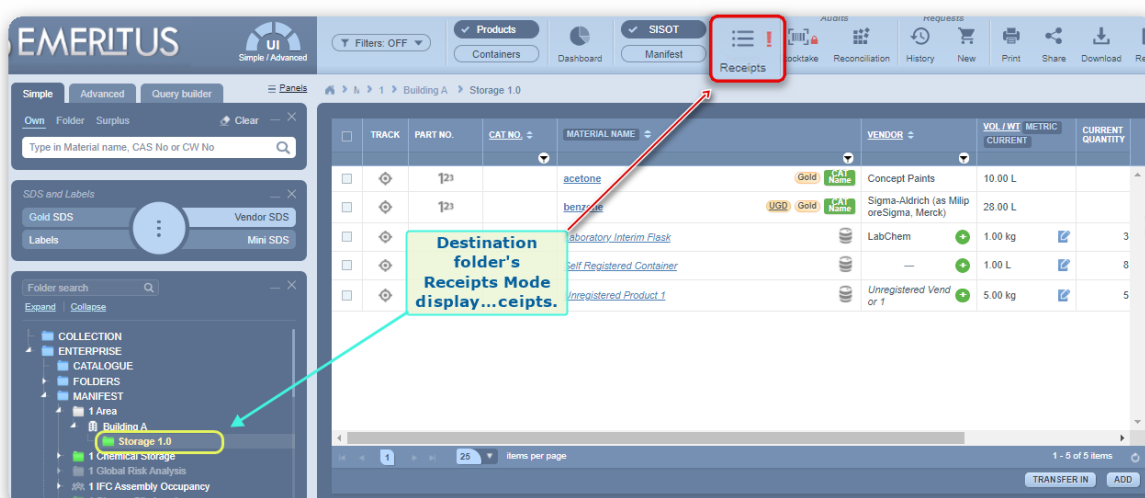


23. **Deactivate** the **New Request** mode by clicking the highlighted New Request button.



The **next stage of the transfer process** is to scan and accept the **Pending Receipts** into the destination folder using the **Receipts Mode**.

**i** Notice that the Receipts button will display an “Exclamation mark” for pending receipts. The next stage of the transfer process is to accept the pending receipts into the destination folder. Recall which type of transfer outcomes are possible based on user permissions.



Go to the [Receipts Mode in Section 4](#) to learn about the Receipt's Mode and how to use it to scan and accept transfers into the destination folder that contains pending receipts.

## 3.0 Shopping Story

HOME | SISOT | SHOPPING PROCESS

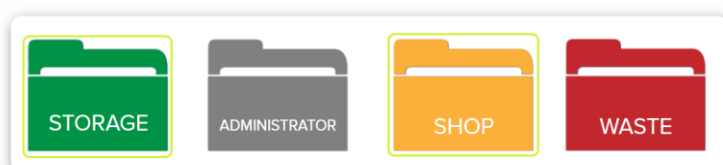
This topic will cover the following objectives;


- Requesting containers from an Orange (Shop) Folder
- Request stage from Central Store (Shop Folder)
- Requesting for a transfer of a container
- Approval and processing stage (shop receipts & dispatch)
- Receiving pending items ordered



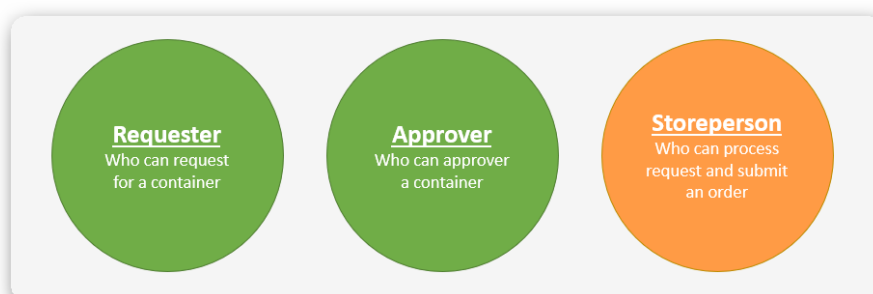
### Recap: Folder Types

There are four main folder types in the system. In the shopping story, the focus is on the **Shop Folder** (Storeperson's access granted) and the **Storage Folder** (Requester's access granted).

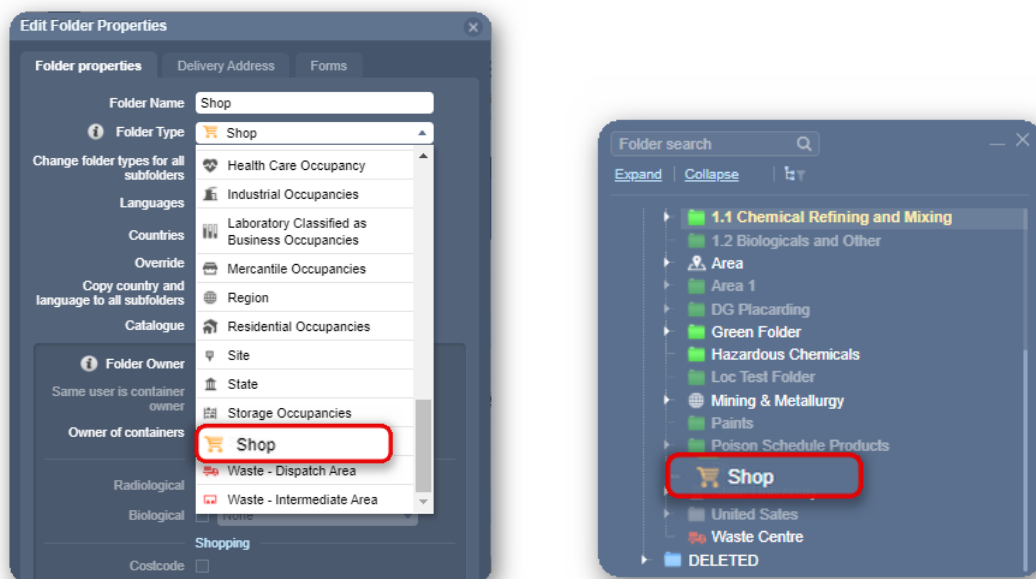


Shopping in Sisot refers to moving containers from an Orange Folder  (termed as a default **Shop Folder**). A Shop Folder can be created through the right click functionality from the Manifest directory within the Folder Tree panel or if a folder is already existing, the folder type can be changed by simply setting the folder type from folder properties.

Within Sisot, there is a set workflow and specific user profiles that determine the following action points based on the type of user.



## Folder Properties and Shop Folder under the Manifest Directory



Shopping is a more complex process than transferring and requires coordination of more than one type of user to complete the task of “shopping”. Within shopping, there is a set workflow and specific user profiles that determine;

- Who can request a container (*this user is known as the **Requester***)
- Who can approve that container (*this user is known as the **Approver***) and
- Who can process the request and submit an order (*this user is known as the **Storeperson***)

To illustrate this point, let us imagine an organisation that has a factory worker, a floor manager and a warehouse manager and each person has a designated role.

### Factory Floor Worker

The factory floor worker will be aware of what stock they have on hand and what stock they need. The factory worker will primarily be responsible for requesting containers from the warehouse and therefore will be assigned as the “Sisot Requester”. The “Sisot Requester” is a privilege that can be set by an administrator in the Sisot settings that allows the user to make a request for any container from the orange shop folder to be added to their green folder or site location.

### Floor Manager

After the initial request, the Floor manager has the authority to decide whether the request will be approved or rejected. This is because the floor manager has been assigned the privilege of “Sisot Approver” by the administrator. As a “Sisot approver”, it is their responsibility to ensure that the correct product has been assigned to the correct green folder or site location

from the orange shop folder. Although in this example; the Sisot approver is our floor manager, in reality the Sisot approver can be any user as long as they have

- Read/write access to the destination folder and
- Has been given the privilege of “Sisot Approver” in the system settings by the administrator.

Approval can come in any of the following forms:

- Financial approval (how much it costs?),
- Site approval (Is it in the right place?) or
- HSE approval (is it safe to put it there?).

How approvals are managed really depends on how users are set up and what the requirements in your company are profiled for approving a container shipment.


Back to our example, once the request has been approved by the floor manager, the final step in this process is to be sent to the Warehouse Manager.

## Warehouse Manager

The role of the Warehouse Manager is to process requests and dispatch the containers from the Orange Shop Folder or order the containers if they are currently not in stock. They must take care to scan the unique barcodes produced by the Sisot system for each container to ensure the correct container is delivered to the requesters green storage folder. The privilege of the Warehouse Manager is the “Sisot Central Store” and ensures that only users with this permission can process a request or order from the Shop Folder.

The next topic shows how to manage requesting containers from an Orange (Shop) Folder.

## 3.1 Requesting Containers from Orange Shop Folder

In this section, we will explore the stages involved in requesting and ordering containers from an orange (store) folder, known as a “Shop” folder  to replenish stock supplies for a green storage folder. In the transfer story, we looked at “how to transfer containers (*Transfers designated with a “T-XXXX; transfer identity number”*) between folders”, however, in this section, we will cover “how to order (*Orders designated with an “O-XXXX; order number”*) from a Warehouse or a Central Store within the Sisot system. Remember, we also covered the “shopping user profiles” with respect to roles. These role-assignments are interwoven with the three stages of the ordering process:

- The Request Stage
- The Approval Stage



- The Processing Stage

## The Request Stage

This is the first stage (Stage 1) in the process and we will assume that the shop folder has already been set up by the administrator and that the materials/products and containers have been correctly entered into the system's inventory. The shop folder represents a physical warehouse or store (storage facility) where containers are kept where the requester can choose from the list of containers to add into own folder when supplies are needed through the shopping process. A requester can also search for containers that are not available in the shop folder and in this case scenario, an external order will have to be made. However, at this time, the focus will be presenting requests for existing containers in the shop folder.

 The application user for the Request Stage is known as "**Requester User**".

## The Approval Stage

This is the second stage (Stage 2) of the shopping workflow. The approval stage requires the approver to review the initial request submitted and make a decision on whether to approve or deny the request. An approver could be a manager or financial controller depending on whether the approver has been assigned the respective Sisot privilege by the administrator. The approver must be logged into the application as the Sisot Approver User, in which case the login credentials would have been sent by the administrator through email. This user can go directly to the "Requests Tab" to view all pending, approved and/or declined requests. Pending requests submitted from the Request Stage by the requester will be listed and subject to approval or rejection.

 The application user for the Approval Stage is known as "**Sisot Approver User**".

An example of an automated email request for approval request for the approver is depicted below.

Dear,

**A Requester** has requested your approval:

### REQUEST APPROVAL

Request No.	R-0004
Approval Stage	Pending
Request Time	07/06/2021
Number of line items	1

## The Processing Stage

This is the last stage (Stage 3) of the shopping workflow. The central store user, known as the "**Storeperson**" is in charge of the warehouse or central store and delivering stock to other folders. The storeperson will have full access to the central store, can view all approved requests made in the Stage 1 and approved in Stage 2 of the process. The storeperson has the

responsibility of allocating requests made for products in the current shop folder and also finalize orders for products that are not currently in the shop folder. In order to finalize the orders, the non-available containers must be ordered externally through known suppliers/manufacturers. Once the requested containers have been allocated by the storeperson, the request must be submitted for approval which will deem the request approved by the storeperson and must be completed by going to receipts section to complete the transfer in the OUT tab (this is where requests are sent after they have been allocated before they are can be sent to the respective destination folder). The final step in this stage involves printing the “*Picking Slip*”.

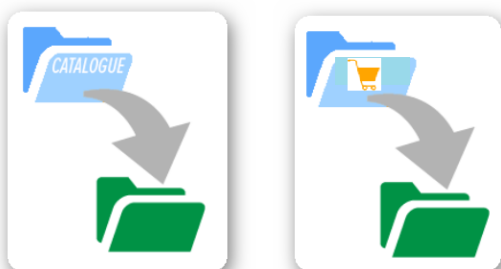
**i** The Picking Slip is an invoice for the transfer that contains information about the container request such as the material name, container size, quantity, location, container barcode, the name of the requester and the destination folder).

The Picking Slip will be used to scan the container barcode(s) to dispatch the item(s) to the destination folder, where the requester will finalise the process by going to the **Receipts Mode (IN tab)** of the destination folder and scanning in the barcode(s) of the dispatched item(s) into the designated folder as per the initial request (Stage 1).

### 3.2 The Request Stage from Central Store (Shop Folder)

There are a various shopping processes when requesting for items. A shopping process exists for the following ways:

- Hosted catalogue
- Stock or shop requests



The Sisot Administrator would have already set up the system’s setting on whether the organisation will use costcodes against specific projects when placing requests/orders, where the financial approval could be a requirement. If the costcode mode for the shopping cart is set to “ON” (activated), then specific costcodes will have to be assigned as per the request by the requester in the shopping cart prior to submitting the request to shop. The “shopping cart” is generally used for ordering chemicals from a store, which is a property on folders; as discussed earlier that this store is termed a “Shop Folder”. The shopping cart captures a request to move items from the shop folder to the requested folder. The requested items will be automatically moved when a storeperson or store manager confirms the order after review. A request can be categorized as;

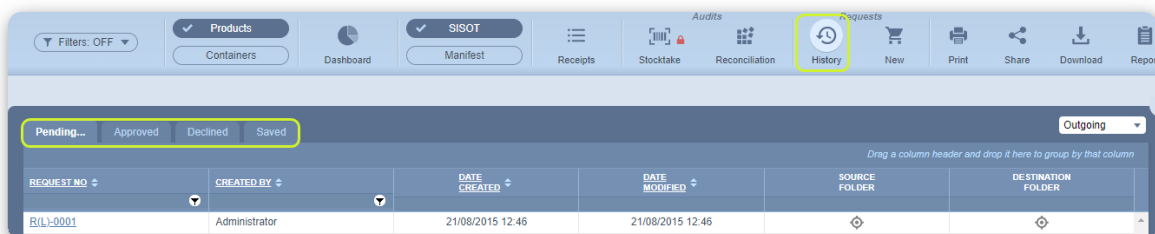
- Allocation
- Order

A request can appear in one of the following status tabs;

- Pending - sent out and awaiting resolution
- Processed - processed and items dispatched
- Accepted – items accepted in the destination folder
- Rejected – cannot be fulfilled and a reason provided

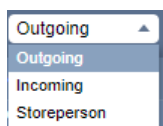
## Requests History Dashboard


The Requests dashboard contains three tabs (*Pending, Approved and Declined*) that capture the status of each request.



Tab	Description
Pending	Lists all pending requests with request number, date when the request was created, requester, date modified and costcode.
Approved	Lists all approved requests with request number, date when the request was created, requester, date modified and costcode.
Declined	Lists all declined requests with request number, date when the request was created, requester, date modified and costcode.
Saved	List all saved requests with request number, date when the request was created, requester, date modified and costcode.

History requests are categorized into three action attributes; namely, Incoming, Outgoing and Storeperson.



Clicking  on a request number from the history dashboard provides further details about the status of the request depending the active tab (whether its pending, approved or declined). The declined tab is used to further illustrate such details below for the “*Outgoing*” item.

PENDING... APPROVED <b>DECLINED</b> <span>Outgoing</span>					
Drag a column header and drop it here to group by that column.					
REQUEST NO	CREATED BY	DATE CREATED	DATE MODIFIED	DESTINATION FOLDER	SOURCE FOLDER
<b>R-0067</b>	Administrator	20/08/2017 15:04	20/08/2017 15:04		
R-0063	Administrator	18/08/2017 12:32	18/08/2017 12:33		
R-0062	Administrator	18/08/2017 12:32	18/08/2017 12:32		

Column Title/Button	Description	Notes
<b>REQUEST NO</b>	T-XXXX is a transfer identity number. R- XXXX is a shopping request identity number.	Receipts are displayed by Request ID and can be sorted by ascending or descending order by clicking on the link header.
<b>CREATED BY</b>	The user login names (requesters) who created the requests are displayed in this column.	Sorted by ascending or descending order by clicking on the link header.
<b>DATE CREATED</b>	Transaction request date.	Click on the column header to sort dates by ascending or descending order.
<b>DATE MODIFIED</b>	Column displays the dates in which the requests were modified.	Click on the column header to sort dates by ascending or descending order.
<b>SOURCE FOLDER</b>	This column displays the track icon to enable users to track the specific folder location for the source folder.	The source folder once tracked will be highlighted within the folder tree structure for ease of identification.
<b>DESTINATION FOLDER</b>	This column displays the track icon to enable users to track the specific destination folder location.	The destination folder once tracked will be highlighted within the folder tree structure for ease of identification.

History details about the declined outgoing item is displayed below.

Request Status: Declined

Source Folder:

Destination Folder:

Requestor: Administrator

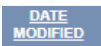






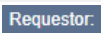

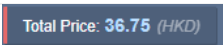

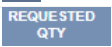










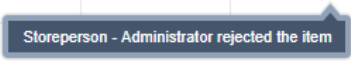

Approver: Administrator

Cost Code: 1111

Total Price: 400.00 (AUD)

CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAG \$	REQUESTED QTY	UNITPRICE (AUD)	SUBTOTAL (AUD)	PARTIAL DELIVERY	APPROVED
	water	Bio-Rad Laboratories	80 kg		4	100	400.00	X	X

Column Title/Button	Description	Notes
<b>Request No.</b>	T-XXXX is a transfer identity number. R- XXXX is a shopping request identity number.	Displayed in the <i>home</i> string when opened.
<b>Request Status:</b>	Displays the status of the request	Status is depended on the active history dashboard tab; e.g. If the declined tab is the active tab, then the status of the request will be shown as declined <b>Declined</b> .
<b>DATE CREATED</b>	Transaction request date.	Click on the column header to sort dates by ascending or descending order.

Column Title/Button	Description	Notes
	Column displays the dates in which the requests were modified.	Click  on the column header to sort dates by ascending or descending order  .
	The source folder element contains a track icon  to enable users to track the specific folder location for the source folder.	The source folder once tracked will be highlighted within the folder tree structure for ease of identification.
	The destination folder element contains a track icon  to enable users to track the specific destination folder location.	The destination folder once tracked will be highlighted within the folder tree structure for ease of identification.
	<b>Requester</b> username	The name of the user who submits the request.
	<b>Approver</b> user name	The name of the user who approves the request.
	<b>Total Price</b> shall be displayed in this element (if used during the requisition)	The total amount (price) if the item shown during the requisition.
	Reject requested item icon	Deny request of item
	Requested quantity displays in this column.	The number value (quantity) is the same as the value initiated by the requester in the first stage of the process.
	Partial delivery is designated with a red cross  or a green tick  dependent on the status of the delivery.	If a request is partially approved, the green ticket  is assigned in this column.
	The sub-total is the price amount for the unit price as per the container quantity costs allocated in the catalogue or during the placing of the order.	Unit price currency is displayed depending on the country's currency for the specific order during initiating of the request.
	The Approved column provides the status of the approval of the request.	Rejection icon  is displayed in this column as status of the approval is "Rejected"   . Clicking  this icon provides the name and reason of the rejection. 
	Press the "Exit" button to close the status view of that particular request history.	Exit button takes the user back to the history requests dashboard.

## Receipts

All requests are captured in “Receipts Mode” for each and every step of the shopping request process. Shopping receipts are records about the IN and OUT operations for the Shop Folder which consists of two parts:

- Pending – items awaiting resolution (IN and OUT modes)
- History – completed transactions “to and from” the folder

### The IN Mode in Receipts

The IN mode in receipts is a quick receive mode for items which provide details about the transaction in a grid where all the received items can be scanned one by one. If an item is found in active Receipts, then, automatically accept the item with appropriate record in Receipt. If an item is NOT found in active Receipts, ask the user to specify the appropriate Source location (folder). The source folder location must be checked for availability of this type of item and if confirmed not to be found, then this means that “accepting” will not be possible to process a non-existent item. This stage contains the grid columns with the following headers where each cell will contain information/data about an existing item’s requested order.


- Vendors/Suppliers
- Order No.
- Cat No.
- Cat Name
- Vendor Name
- Container Size
- Ordered Quantity
- Received Quantity
- Received Date
- Barcodes

Receipts										
Shopping > Shop 1										
IN / PENDING										
VENDORS / SUPPLIERS	ORDER NO.	CAT NO.	CAT NAME	VENDOR NAME	CONTAINER SIZE	TAGS	ORDERED QUANTITY	RECEIVED QUANTITY	RECEIVED DATE	BARCODES
General Machine Products	O-0070	111116	C CEMENT	General Machine Products	0mcg	PKG 1 L New tag	4	2	02/11/2017	
SUBMIT										
Sigma-Aldrich (Merck)	O-0065	Unspecified	july	Sigma-Aldrich (Merck)	34mcg	hello A PKG 8 L DGC 8	1	0		
		Unspecified	july23	Sigma-Aldrich (Merck)	34mcg	hello A PKG 8 L DGC 8	1	1	31/10/2017	
		Unspecified	sioot	Sigma-Aldrich (Merck)	34mcg	hello A PKG 8 L DGC 8	1	0		
SUBMIT										
	O-0029-S	Unspecified	allocate_shop1	Sigma-Aldrich (Merck)	22lb	PKG 8 L	10	0		
SUBMIT										
Sioot	O-0027-S	1/11 test	hello	Tokyo Chemical Industry Co (TCI Europe)	0mcg	PKG 8 L DGC 8	10	0		
		Unspecified	name	Santa Cruz Biotechnology	22mcg	PKG 8 L	10	0		
SUBMIT										
1 - 4 of 4 Items										
OUT / PENDING										
IN HISTORY										
OUT HISTORY										

The following pre-requisites for Sisot settings, user types, roles and privileges are used in the following worked example.


## Sisot Administrative Settings (Background Information)

The Sisot settings are configured by the administrator. In this case scenario, the Shopping Approval is not activated and a Folder approver is not required.

Tab	Settings 
Shop	Costcodes for Shopping cart NOT set.
Folder Approver	Folder Approver for “Use of HSE approvals” is not applied.

### User Access Settings:

The Sisot user access roles, approver and shop folder have been set up.

Roles	Settings 
Roles	Requester; form linked to staff members with respect to the role of the user.
Approver (If applied with costcode)	Financial Approver; form linked with respect to the role of the user
Shop	Shop folder assigned to storeperson responsible executing requests/orders.








### User Types, Roles and Privileges:


The Sisot user roles and privileges have been set up and described below.



User	Folder and Permission	Role(s)	Privileges
Requester	Store (Shop) Read & Laboratory Read & Write. Delivery address specified.	Requester	All privileges apart from Sisot Approver and Sisot Central Store
Storeperson	Store (Shop) Read & Write Laboratory No Access	Shop	All apart from Sisot Requester & Sisot Approver

A Requester can request items from an Orange (Shop) Folder as well as search the catalogue for items that are not available in the Orange (Shop) Folder. The worked example below illustrates how to place a request to the Central Store (Warehouse) or Shop Folder for a specific number of containers required in the Requester’s own site (Storage Green Folder).


### Steps: Request container from a Shop folder to a destination folder (Delivery Address specified)



1. Select  the **Home** module button .
2. Select  a **Shop Folder**  under the Manifest directory.
3. Click  on the **Sisot** button from Sisot toolbar.
4. Select  the **New Request**  button from the Sisot toolbar.

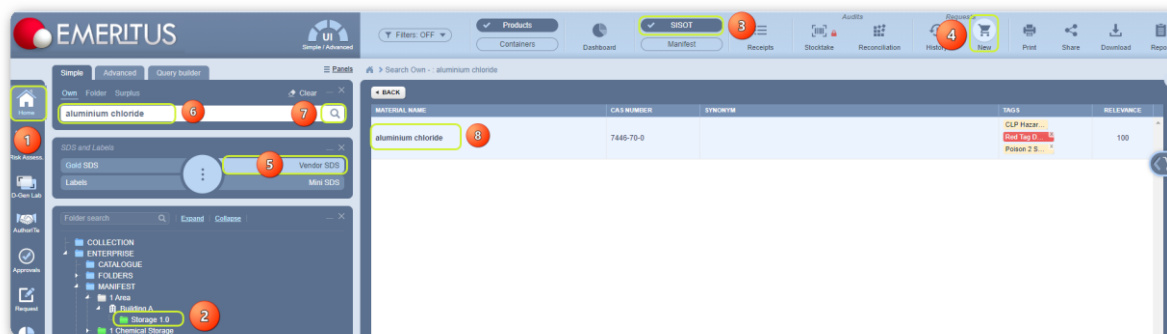
- Press  the **Multiple** button alongside the material name (if there's more than one vendor for the material).





 Note that if there's only a single vendor for the material, the Cat Name  button will be shown in the grid.

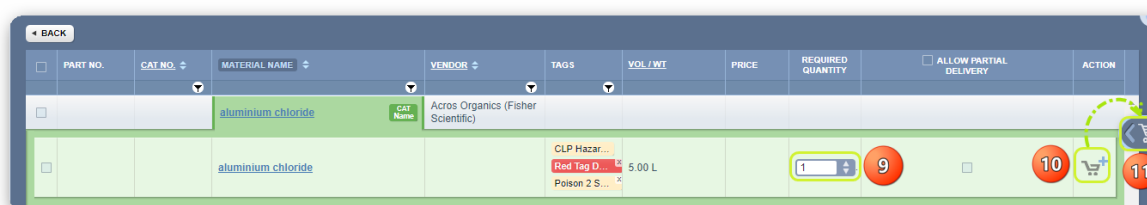
- Click  the on **Name/CAS** text field and **type the name of the product** to search from **Own**.


 The Own search path refers to your own organisational inventory within the Chemwatch database.

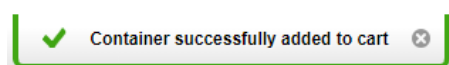
- Click  the **Search** icon (magnifying glass) to look for available containers from the shop inventory.
- Press  the **Material name** from the search results to display available Vendor SDS records in the shopping grid.



- Click  on the **Required Quantity** text field to enter a **Number Value** for the required quantity or use the upward arrow, e.g., *1 container is needed for supply*.
- Click  on **Add to Cart** icon from the Action column alongside the container value to select a barcode(s) and click the "OK" button to add item into the Shopping Cart.
- Click  on the **Shopping Cart** slide panel icon  on the right-hand side mid-area of the user interface.





 A confirmation message displays – material added to the cart.

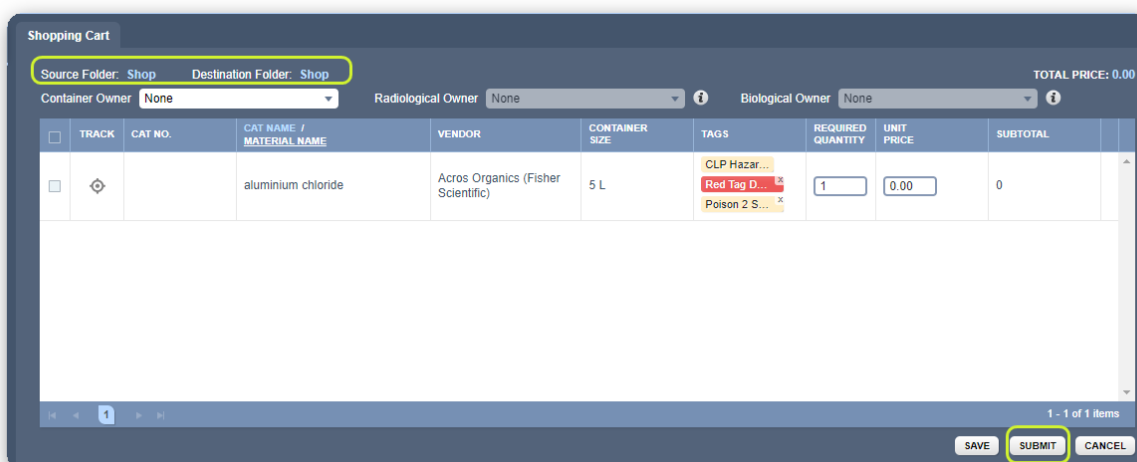
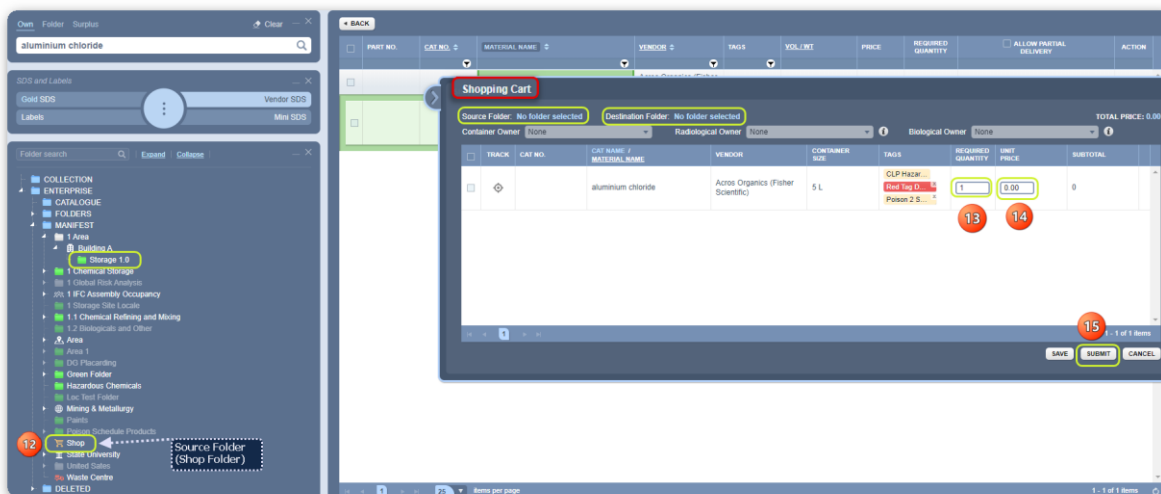


- Select  the **Source Folder**  from the tree structure.

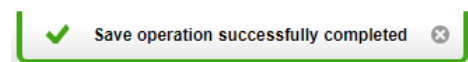


**i** Notice the source folder and destination folder names will display on the Shopping Cart slider panel after selection.

13. Check your **Required Quantity** value if it's correct.
14. Enter the **Unit Price** for the item(s) if applicable.
15. Click  the **Submit** button  from the transfer cart slide panel



**i** The **Save** operation message will display.



The Shopping Request Stage is now completed by the Requester. The Requester will be notified once the order has been processed or declined by the respective Storeperson.

### 3.3 The Approval Stage from Central Store (Shop Folder)

The next stage is for the request to be approved. The steps below show “how to approve the request”. The Approver must login to the application as the respective Sisot Approver in order to approve or decline the request. In this exercise, the approver will approve the request.












#### Predefined data

User type	Product	Vendor	Container Size	Quantity Available	Requested Quantity	Status of Request
Requester	Aluminium Chloride	Acros Organics	5L	3	1	Shopping request sent to approver for approval
Approver/Storeperson	Aluminium Chloride	Acros Organics	5L	6	1	Shopping request is pending approval from the order tab

The **Storeperson** must login to the application as the Shop Manager to approve the respective order request.

In this case, the request R-XXXX was submitted by Requester in Stage 1 of the process.

#### Steps: Order Processing of the Shopping Request (Approval)

1. Select  the **Home** module button .
2. Select  a **Shop Folder**  under the Manifest directory.
3. Click  on the **Sisot** button from Sisot toolbar.
4. Select  the **History** button from the Sisot toolbar.
5. Click  on the **Order** tab to view the list of orders.
6. Assign the **Storeperson** from the dropdown arrow on the right-hand side of the history request window.
7. Click  the **Request No. Arrow**  icon to expand the row to view the request details.
8. Confirm the order quantity and click  on the approved checkbox to “Reject” an item. If there’s no item to decline, simply **maintain the marked checkbox as approved** and go to the next step.
9. Click  on the **Submit** button to place the order items in “Shop Receipts mode”.

10. Enter details in the Vendor **Order Form** such as the requester address details, vendor details, shipping details/delivery date in the applicable fields.
11. **Print, Email** or **Download** the Vendor Form after filling your **Company** details; **Vendor Supplier information** and the **Ship To** details to keep a record of the approved order to share with the requester where applicable.

**EMERITUS**

Street Address : 1227 Glen Huntly  
City, ST ZIP Code : VIC3163  
Phone / Fax : +61 3 9573 3100  
e-mail : chemwatch@chemwatch.net

P.O. No. O-0003  
Date 07/07/2021 20:08  
Customer ID 0

**VENDOR/SUPPLIER**

Name:  
Company Name: ABC Company  
Street Address: 123 Street 1  
City, ST ZIP Code: VIC3100  
Phone:

**SHIP TO**

Name:  
Company Name: ABC2  
Street Address: 456 Street 2  
City, ST ZIP Code: VIC3000  
Phone:

SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE
Road	Packaged	15/7/2021

QTY	CAT NO.	CAT NAME	VENDOR	CONTAINER SIZE	UNIT PRICE	SUBTOTAL
1		aluminium chloride	Acros Organics (Fisher Scientific)	5L	0	0
TOTAL PRICE						0

12. Use the **Print** or **Download** button to print the **Vendor Order Form**.

Print

GetOperationResult 1 / 1 90%

Street Address 1227 Glen Huntly  
City, ST ZIP Code VIC3163  
Phone / Fax +61 3 9573 3100  
e-mail chemwatch@chemwatch.net

P.O. No. O-0003  
Date 07/07/2021 20:08  
Customer ID 0

**VENDOR/SUPPLIER**

Name:  
Company Name: ABC Company  
Street Address: 123 Street 1  
City, ST ZIP Code: VIC3100  
Phone:

**SHIP TO**

Name:  
Company Name: ABC2  
Street Address: 456 Street 2  
City, ST ZIP Code: VIC3000  
Phone:

SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE
Road	Packaged	15/7/2021

QTY	CAT NO.	CAT NAME	VENDOR	CONTAINER SIZE	UNIT PRICE	SUBTOTAL
1		aluminium chloride	Acros Organics (Fisher Scientific)	5L	0	0
TOTAL PRICE						0

13. Click on **Order History** from the Order drop-down arrow to view details.

The Order History will show the respective order number, e.g., Order No: O-00XX. The Order has now been **approved** and submitted by the **Storeperson** and the Vendor Order Form generated.

REQUEST NO.	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	UNIT PRICE	TOTAL PRICE	ORDER QTY	APPROVED
Vendor/Supplier: 3M									
Delivery Address: Unspecified									
Vendor/Supplier: Acros Organics (Fisher Scientific)									
Delivery Address: Unspecified									
Order No: O-0003									
Unspecified		aluminium chloride ALUMINIUM CHLORIDE	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	0	0	1	
R-0004						0	0	1	

OPEN ORDER

Check Request Status in the “**Outgoing**” list, e.g., Approved by selecting the Request No.

REQUEST NO.	CREATED BY	DATE CREATED	DATE MODIFIED	SOURCE FOLDER	DESTINATION FOLDER
T-0013	Administrator	19/09/2016 12:24	19/09/2016 12:24		
R-0004	Administrator	07/07/2021 19:34	07/07/2021 19:34		
R-0003	Administrator	06/02/2019 14:10	06/02/2019 14:10		
R-0002	Administrator	06/02/2019 12:01	06/02/2019 12:01		
R-0001	Administrator	08/01/2018 15:54	08/01/2018 15:54		

Select the Request No. to confirm approval. Once confirmed, the approved column will display a green tick for the request. Press the “**Exit**” button and click on the “**History Request**” button to go back the folder list of materials.

Request Status: **Approved** | Source Folder: | Destination Folder: |

Requestor: Administrator | Approver: Administrator

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QTY	UNIT PRICE	SUBTOTAL	PARTIAL DELIVERY	APPROVED
aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	1	0	0.00	✗	✓

Filters: OFF | Products | Containers | Dashboard | SISOT | Manifest | Receipts | Stocktake | Reconciliation | **History** | New

The next stage of the process is for the store person to deliver/dispatch the order from Receipts In/Pending mode from the Shop tab to the destination folder.

Requester Saves Request from the Shopping cart

Shopping Cart

Source Folder: Shop | Destination Folder: Shop | TOTAL PRICE: 0.00

Container Owner: Administrator | Radiological Owner: None | Biological Owner: None

TRACK	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUIRED QUANTITY	UNIT PRICE	SUBTOTAL
<input type="checkbox"/>		aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	1	0	0

1 - 1 of 1 items

**SAVE** | SUBMIT | CANCEL

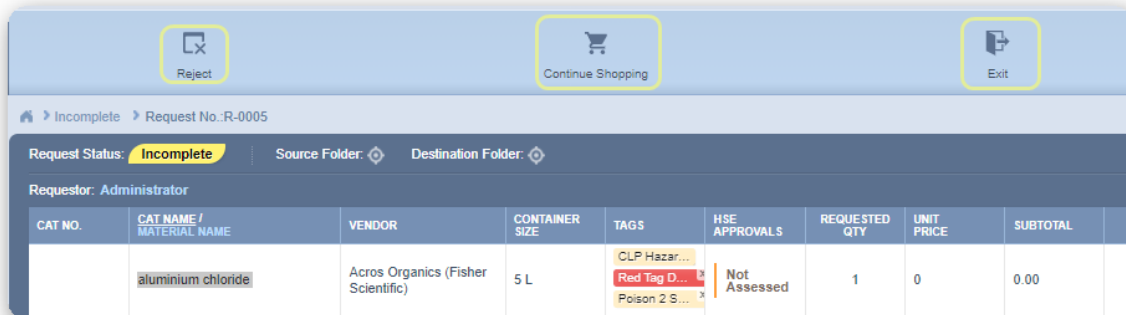
If a request was saved from the Shopping Cart by Requester, that record will be saved into the Shopping request history as an Order History. The request status will be shown as Incomplete.

Request Status: **Incomplete** | Source Folder: | Destination Folder: |

Requestor: Administrator

CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	HSE APPROVALS	REQUESTED QTY	UNIT PRICE	SUBTOTAL
	aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	Not Assessed	1	0	0.00

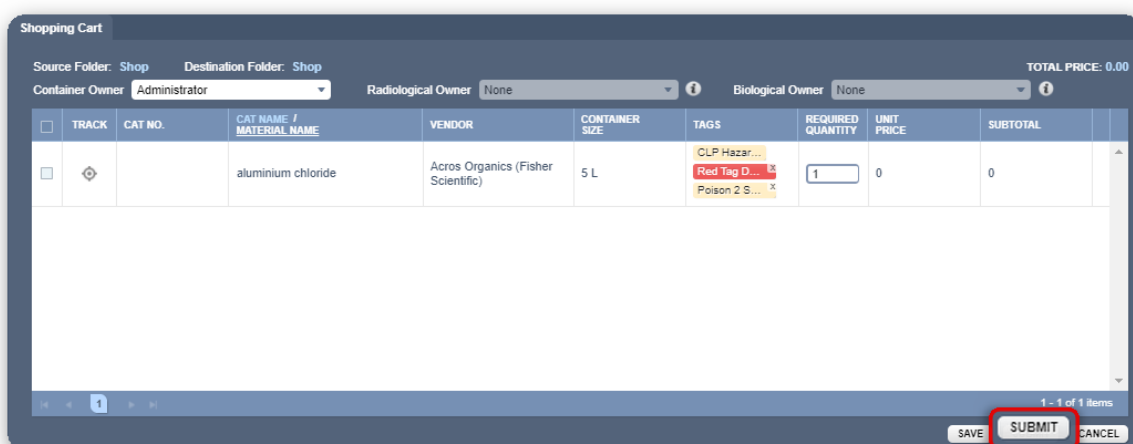
Otherwise, the approver can reject the request or allow continuing shopping.



Request Status: **Incomplete** Source Folder: Destination Folder: Requestor: Administrator

CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	HSE APPROVALS	REQUESTED QTY	UNIT PRICE	SUBTOTAL
	aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	Not Assessed	1	0	0.00

If the request is allowed to continue shopping; this will render the shopping cart with the request details. The request must be submitted to move to the next stage of the process.



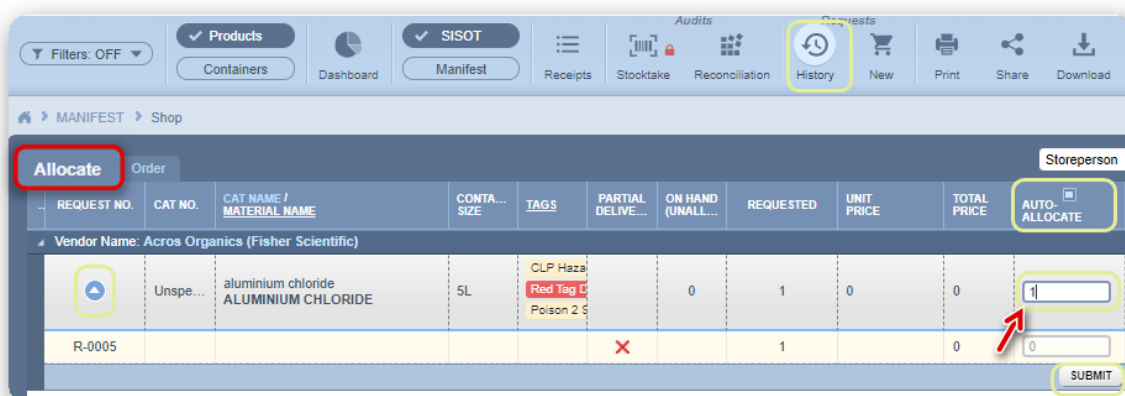
Source Folder: Shop Destination Folder: Shop Container Owner: Administrator Radiological Owner: None Biological Owner: None TOTAL PRICE: 0.00

TRACK	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUIRED QUANTITY	UNIT PRICE	SUBTOTAL
<input type="checkbox"/>		aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	1	0	0

1 - 1 of 1 items

SAVE **SUBMIT** CANCEL

If the Shop Folder does not have the requested container(s) on hand, then allocating containers must be done by going to the History Requests mode and press the Allocate tab and submit.



Filters: OFF Products Containers Dashboard Manifest Receipts Stocktake Reconciliation **History** New Print Share Download

MANIFEST Shop

**Allocate** Order Storeperson

REQUEST NO.	CAT NO.	CAT NAME / MATERIAL NAME	CONTA... SIZE	TAGS	PARTIAL DELIVE...	ON HAND (UNALL...	REQUESTED	UNIT PRICE	TOTAL PRICE	AUTO-ALLOCATE
		aluminium chloride	5L	CLP Hazar... Red Tag D... Poison 2 S...		0	1	0	0	1
R-0005		ALUMINIUM CHLORIDE					1		0	0

Vendor Name: Acros Organics (Fisher Scientific)

**SUBMIT**

The Order will then be generated.

REQUEST NO.	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	UNIT PRICE	TOTAL PRICE	ORDER QTY.	APR
	Unspecified	aluminium chloride ALUMINIUM CHLORIDE	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...		0	1	
R-0005							0	1	

### 3.3.1 The Processing Stage (Shop Receipts – Dispatch)

**Steps:** Order No. O-XXXX Processing in Shop Receipts to dispatch items

1. Select the **Home** module button .
2. Select the **Shop Folder** under the Manifest directory.
3. Click on the **Sisot** button from Sisot toolbar.

TRACK	PART NO.	CAT NO.	MATERIAL NAME	VENDOR
	123		1,1,1-trichloroethane	Merck
	123		acetic acid glacial	Thermo Fisher Scientific
	123		acetone	Merck
	123		acetone-D6	Merck
	123		aluminium chloride	Acros Organics (Fisher Scientific)
	123		Apparent Weedy Seedy 250 Herbicide	Apparent
	123		argon	Linde Gas
	123		benzene	Merck

4. Select the **Receipts** button from the Sisot toolbar.

5. On the far-left top corner of the Receipts window, click on the **Tree** expand icon to expand folder tree panel to select the **Shop Folder**.
6. Press the **Shop** tab to view the **Order No.** details.
7. Click on the **Received Quantity** text field to enter **Number Value** for the required quantity, e.g., 1 container is needed for dispatch as per the request.

Receipts

Expand Collapse

MANIFEST > Shop

Transfer Shop

IN / PENDING

VENDORS / SUPPLIERS	ORDER NO.	CAT NO	MATERIAL NAME	VENDOR NAME	CONTAINER SIZE	TAGS	ORDERED QUANTITY	RECEIVED QUANTITY	RECEIVED DATE
Acros Organics (Fisher Scientific)	O-0003-S	Unspecified	aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	1	0	

OUT / PENDING

IN HISTORY

OUT HISTORY

8. Click the required quantity **Edit** icon to generate the label template barcode for this item from the label gallery, or simply scan the barcode for the item which should match the existing barcode in the barcode column for the order line item.

VENDORS / SUPPLIERS	ORDER NO.	CAT NO	MATERIAL NAME	VENDOR NAME	CONTAINER SIZE	TAGS	ORDERED QUANTITY	RECEIVED QUANTITY	RECEIVED DATE
Acros Organics (Fisher Scientific)	O-0003-S	Unspecified	aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	1		

9. Click on the **Save** button on the Edit Container Wizard window.

Edit container

Container Additional Information Sara Destination Folder

1 Product Information **Registered**

CAT Number  
Start typing...

CAT / Container Name \*  
aluminium chloride

Vendor \*  
Acros Organics (Fisher Scientific)

Container Size \*  
5 Metric L

Container Type  
Bottle

CAS No. 7446-70-0 Material State None

Document Linked  
ALUMINIUM CHLORIDE

2 Container Information

Expiry Date

Acquired Date  
08/07/2021

Owner  
None

Note

3 Barcode Management

Quantity \*  
1

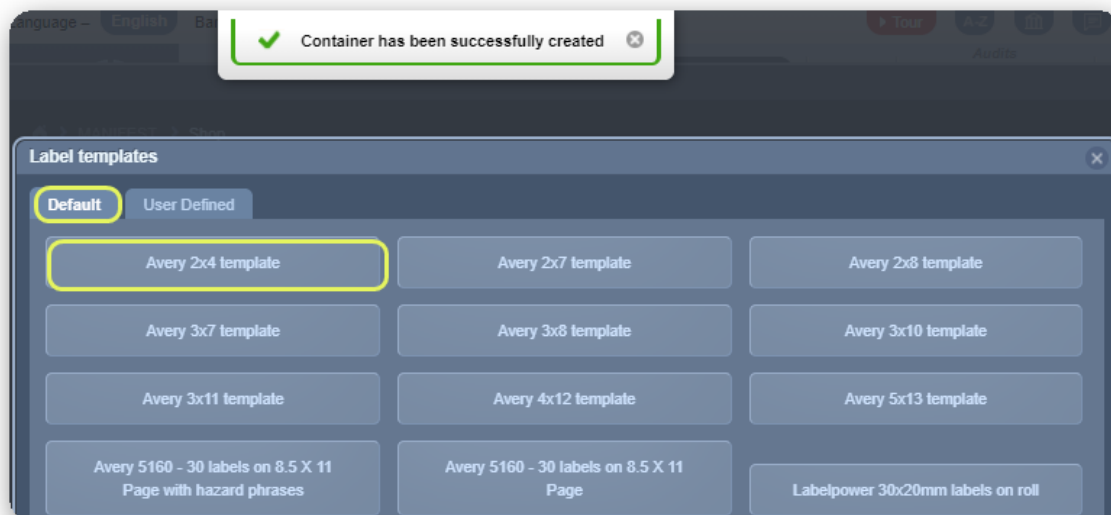
☒ Chemwatch Generated Barcodes  
☐ Barcode for small containers  
☐ Chemwatch Pre-printed Barcodes


\* - Required

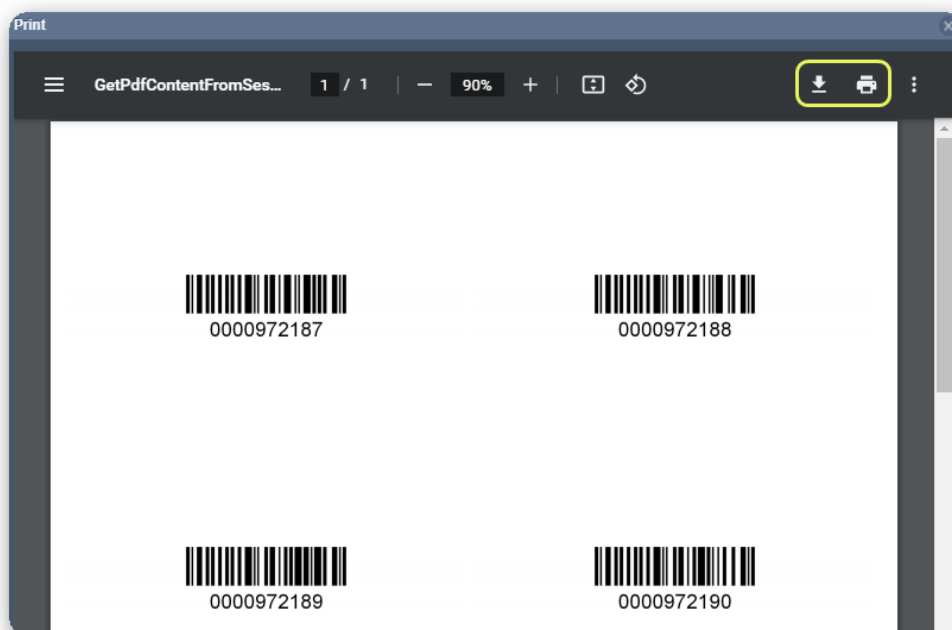
SAVE CLEAR CANCEL

10. Click on the preferred **Label template** name to print label barcode for this item





11. Print **Label barcode** for scanning purpose and **Close**  print and label gallery windows.



12. Press the “**Submit**” button for the captured barcoded items as per order number  
Multiple barcodes are available for the line item, however, only 1 container is being ordered.



The screenshot shows the 'Receipts' window with the 'Shop' tab selected. The 'IN / PENDING' section displays a table with the following data:

VENDOR / SUPPLIER	ORDER NO.	CAT NO.	MATERIAL NAME	VENDOR NAME	CONTAINER SIZE	TAGS	ORDERED QUANTITY	RECEIVED QUANTITY	RECEIVED DATE	BARCODES
Acros Organics (Fisher Scientific)	O-0003-S		aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazard: Red Tag D, Poison 2 S	1	1	08/07/2021	Multiple

At the bottom right, there is a red circle with the number 12 and a 'SUBMIT' button.

**i** Considerations for “**minor storage & conditions for storage** of hazardous chemicals according to the respective standards” will be generated where applicable based on the Dangerous Goods Classification of the substance. Then, click the **OK** button to proceed.

Is the minor storage of hazardous chemicals according to AS/NZS 2243.10:2004?

Minor Storage of Hazardous Chemicals in a Laboratory.  
Quantity of Hazardous Chemicals Permitted To be Stored In A Laboratory Other than In A chemical Storage Cabinet as per AS/NZS 2243.10:2004

Type of substance or Class of dangerous goods	Maximum per 50 m2 kg or L	Maximum pack size kg or L	Conditions for storage	Alternative storage options
Class 3 primary or subrisk	10	5	Labelled standard laboratory cupboard or in small amounts throughout the laboratory	AS 1940 or AS/NZS 3833
Combustible liquids	50	20	Labelled standard laboratory cupboard or in small amounts throughout the laboratory	AS 1940 or AS/NZS 3833
Classes 4.1, 4.2, 4.3, 5.1 or 5.2 (see Note 1)	20 but less than 10 of any one Class	10	Labelled standard laboratory cupboard or, for Classes 4.1, 4.3 and 5.1, in small amounts throughout the laboratory	AS 2714 or AS/NZS 3833
Class 6.1	PG I 10 (Note 2) Other 50	PG I 10 (Note 2) Other 20	Labelled standard laboratory cupboard or in small amounts throughout the laboratory	AS/NZS 4452 or AS/NZS 3833
Class 8	20 For Liquids 50 for solids	20	Labelled standard laboratory cupboard or in small amounts throughout the laboratory	AS 3780 or AS/NZS 3833
Class 9 and aerosols	50 for liquids 100 for solids	5 for liquids 20 for solids	Labelled standard laboratory cupboard or in small amounts throughout the laboratory	AS/NZS 4681 or AS/NZS 3833
Maximum aggregate quantity	200	—	—	—

The next step in the process is to open the **OUT/PENDING** tab to print the picking slip and scan out the item as per the Request No. e.g., R-XXXX.

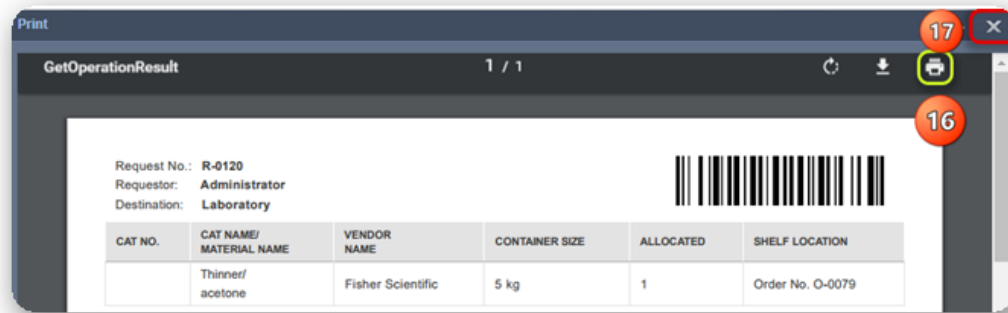
13. Click on the **OUT/PENDING** tab to open pending request to print the picking slip and scan out the requested item.
14. Click the **forward arrow** line item for the request R-XXXX, e.g., R-XXXX., to expand the row to view the request details.
15. Press the **Print Picking Slip** button to print picking slip.


The screenshot shows the 'Receipts' window with the 'Shop' tab selected. The 'OUT / PENDING' section displays a table with the following data:

TO	REQUEST ID	REQUEST DATE	REQUESTOR	CAT NO.	CAT NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	ALLOCATED QUANTITY	ISSUED QUANTITY	BARCODES
B.9.120	08/01/2018	Administrator	Thinner		Fisher Scientific	5 kg	CLP Hazard: Red Tag D, Poison 2 S	1	1	1	—	—

At the bottom right, there is a red circle with the number 15 and a 'PRINT PICKING SLIP' button. A red circle with the number 14 is also visible near the 'REQUEST ID' column.

16. **Print** the request's picking slip from the acrobat reader program's print icon

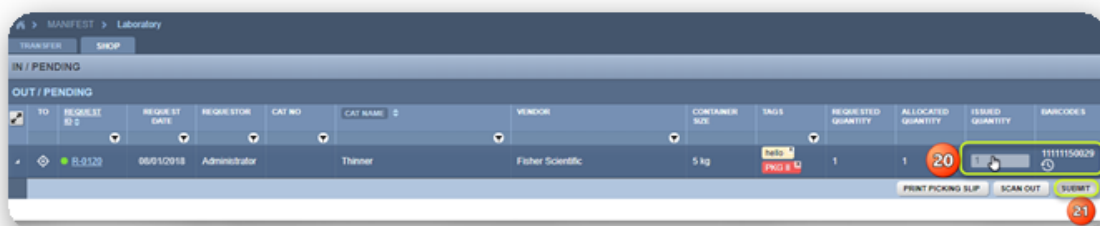


17. Click the **Close** icon  to close the picking slip panel.
18. Press the **Scan Out** button to select the request.





**i** Notice a confirmation message displays for the selected request number, which will automatically disappear.

19. **Scan** the picking slip barcode for the request.
20. **Scan** the item's printed barcode. Note that the Issue Quantity value changes from value "0" to "1" for the single scanned barcode, e.g., barcode ID No.
21. Press the **Submit** button.





22. Click the **forward arrow** for the request, R-XXXX to expand the row.
23. Press the **ISSUED** button to open a window to list issued item(s).



24. Click  the **Accept** button  to accept issued container



25. Click  textbox field to **Scan ID or Electronic Signature**
26. Confirm collection of issued container by pressing the **YES** button .









The scan will automatically be deactivated, and the requisition record is dispatched from the OUT/PENDING list and the record saved in OUT/HISTORY.

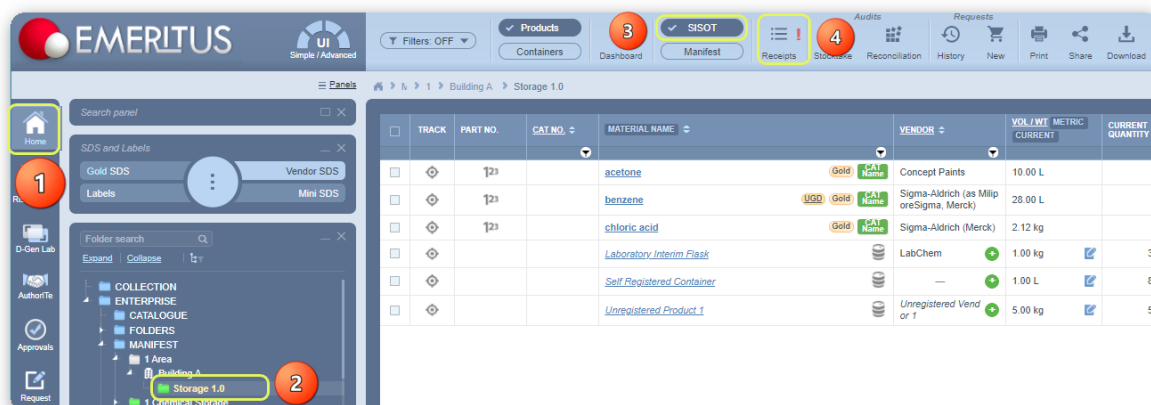
The next step is for the requester to receive the dispatched container as per requested item.




### 3.3.2 Receiving Pending Item Request (Shop Receipts in Destination folder)

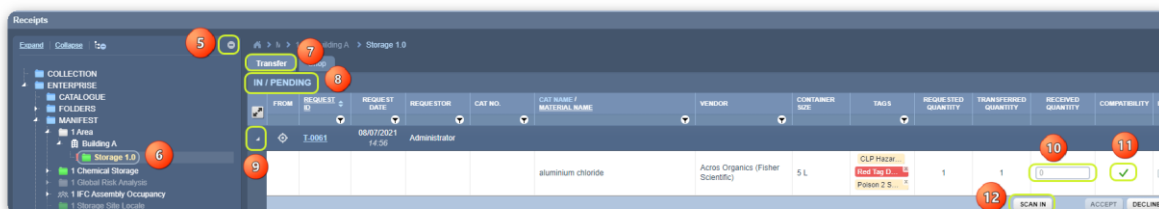
The next step in the process is to receive the pending request item as per the Request No. R-XXXX. The requester must login to the application to complete the final process in receiving the requested container from the shop folder. The steps below illustrate how to receive the container into the destination folder as per a request.

#### Steps: Receiving Pending Item from a Shop folder to Destination folder

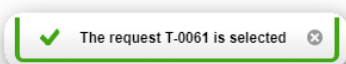
1. Select  the **Home** module button .
2. Select  a **Destination folder**  under the Manifest directory.
3. Click  on the **Sisot** button from Sisot toolbar.
4. Select  the **Receipts** button with exclamation mark icon from the Sisot toolbar.



5. Click on the  icon on the tree panel to expand folders.
6. Select the destination folder.
7. The Receipts window defaults to the **Transfer** tab.
8. Press the **IN/PENDING** tab.
9. Click on the **forward arrow** icon  to expand request line item for details to identify the transfer ID, container details to scan the item.
10. Confirm Requested Quantity, Transferred Quantity versus the **Received Quantity**.  
Take note of the request details about the container, e.g., container barcode ID number will have received quantity being "0" by default.
11. Check for **compatibility**; if there is a tick icon  for the line item, this means that the container is compatible to store in the folder/location.
12. Click on the **Scan In** button to activate scan mode.



The scan activation message will display to confirm action.




13. **Scan** the item barcode on the printed label. Notice the scanned single barcode will automatically insert the value in the *Received Quantity* field as "1" as per the transferred (dispatched) container. Message displays confirmation.

Item successfully scanned!

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
aluminium chloride	Acros Organics (Fisher Scientific)	5 L	CLP Hazar... Red Tag D... Poison 2 S...	1	1	1	✓	0000972187

13 SCAN IN 14 ACCEPT DECLINE

14. Click  on the **Accept** button to receive the transfer in the destination folder.

15. Click  **YES** button to set maximum volume/weight for the material.

**Max volume exceeded**

The set volume has exceeded the maximum for this material.  
Do you want to set this new value as the new maximum volume?

• ALUMINIUM CHLORIDE

**YES** CANCEL

Transfer of the request line item is accepted and received in destination folder. The requested line-item record disappears from the Transfer IN/PENDING list.

Receipts

Transfer Shop

IN / PENDING

FROM	REQUEST ID	REQUEST DATE	REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
	T-0058	06/07/2021 13:41	Administrator										

16. Confirm successful transfer in the INHISTORY tab.

Transfer Shop


IN / PENDING

OUT / PENDING

INHISTORY

FROM	REQUEST ID	REQUEST DATE	DATE RECEIVED	REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY
	T-0061	08/07/2021 14:36	09/07/2021 12:36	Administrator		aluminium chloride	Acros Organics (Fisher Scientific)	5 L	1	1	1	✓

17. Close the Receipts window and confirm container's availability in the folder location. Message displays deactivated scan mode.

 The shopping process is now completed as we have covered the main three stages of the process.

The Shop Folder will show 1 quantity less (5 out of 6 containers) from the initial total current quantity (6 containers) prior to the transfer.

TRACK	PART NO.	CAT. NO.	MATERIAL NAME	VENDOR	VOL./WT	METRIC	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
	123		1,1,1-trichloroethane	Merck	100.00 L				
	123		acetic acid glacial	Thermo Fisher Scientific	30.00 L				
	123		acetone	Multiple	200.00 L				
	123		acetone-D6	Merck	75.00 L				
	123		aluminium chloride	Acros Organics (Fisher Scientific)	25.00 L				
	123		aluminium chloride		5.00 L		5	0 Bq	Status
	123		Apparent Weedy Seedy 250 Herbicide	Apparent	21.00 L				

This number must also tally with the remaining quantity barcodes.

TRACK	PART NO.	CAT. NO.	MATERIAL NAME	VENDOR	VOL./WT	METRIC	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
	123		1,1,1-trichloroethane	Merck	100.00 L				
	123		acetic acid glacial	Thermo Fisher Scientific	30.00 L				
	123		acetone	Multiple	200.00 L				
	123		acetone-D6	Merck	75.00 L				
	123		aluminium chloride	Acros Organics (Fisher Scientific)	25.00 L				
	123		aluminium chloride		5.00 L		5	0 Bq	Status

TRACK	BARCODE	QUANTITY	CURRENT VOL/WT	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
	0000972192	1	5.0 L	None	None			
	0000972191	1	5.0 L	None	None			
	0000972190	1	5.0 L	None	None			
	0000972189	1	5.0 L	None	None			
	0000972188	1	5.0 L	None	None			

The next step is for the Requester to confirm the received item in the destination folder.

TRACK	PART NO.	CAT. NO.	MATERIAL NAME	VENDOR	VOL./WT	METRIC	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
	123		acetone	Concept Plants	10.00 L				
	123		aluminium chloride	Acros Organics (Fisher Scientific)	5.00 kg				
	123		aluminium chloride		5.00 L		1	0 Bq	Status

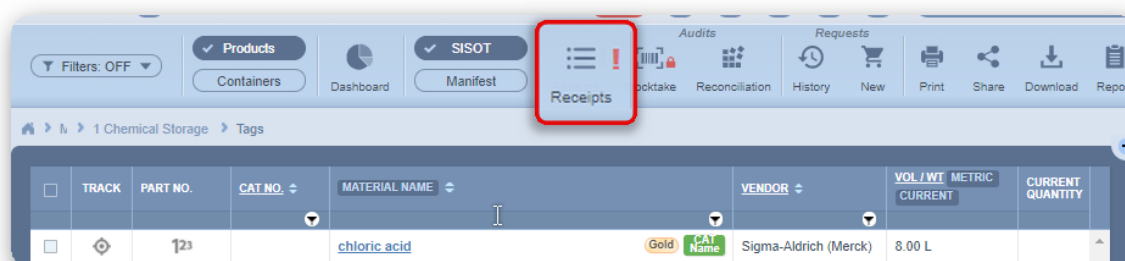
TRACK	BARCODE	QUANTITY	CURRENT VOL/WT	EXPIRY DATE	OWNER	NOTES	HISTORY	ACTION
	0000972187	1	5.0 L	None	Administrator			

## 4.0 Receipts Mode

HOME | SISOT | RECEIPTS

This topic will cover the following objectives;

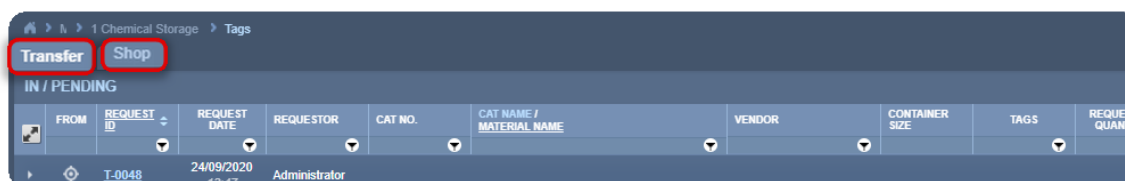
- Differentiating between receipts for transfers & shopping
- Receiving a transfer request
- Scan and accept pending transfer receipt
- Shopping request completed and items transferred into destination folder



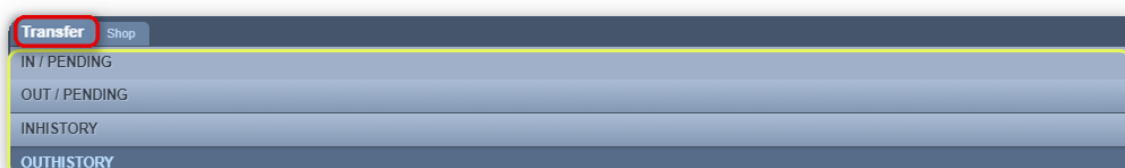
### What are Receipts in Sisot?

Receipts in Sisot refer to items requested for transfer or shopping for **IN** and **OUT** operations for any store/folder/location. Receipts are categorized into the two main types of tabs as per the Sisot process:

- **Transfer** – Receipt IN for folder/location manages transfers
- **Shop** – Receipt IN for shop folders manages all receiving orders from vendor



### THE RECEIPTS **TRANSFER** TAB











The transfer tab is structured into PENDING and HISTORY tabs which house all transfers that are pending and history records of transacted line items respectively.










- IN/PENDING - Incoming pending line items
- OUT/PENDING – Out pending line items
- IN HISTORY – Records of incoming transacted items
- OUT HISTORY – Records of outgoing transacted items




The OUT/PENDING and IN/PENDING tabs reflect when a transfer is ready for dispatch, and when it is ready to be received, respectively. The **IN/PENDING receipts mode** is a quick receivable mode for any incoming transfers. This mode counts the number of items in incoming receipts. If the number exceeds the number of items available, the next scanned item will be treated as NOT found in active receipts. Similar containers will be grouped by barcode, name, container size and source folder/location to calculate the quantity.

The **OUT/PENDING receipts mode** provides the ability to select one or more containers to transfer to another store/folder/location. The transfer is called a “Transaction”. The transaction can be **Accepted** or **Declined** by the receiving party.

The table below provides descriptions of the Receipts mode elements and functions.

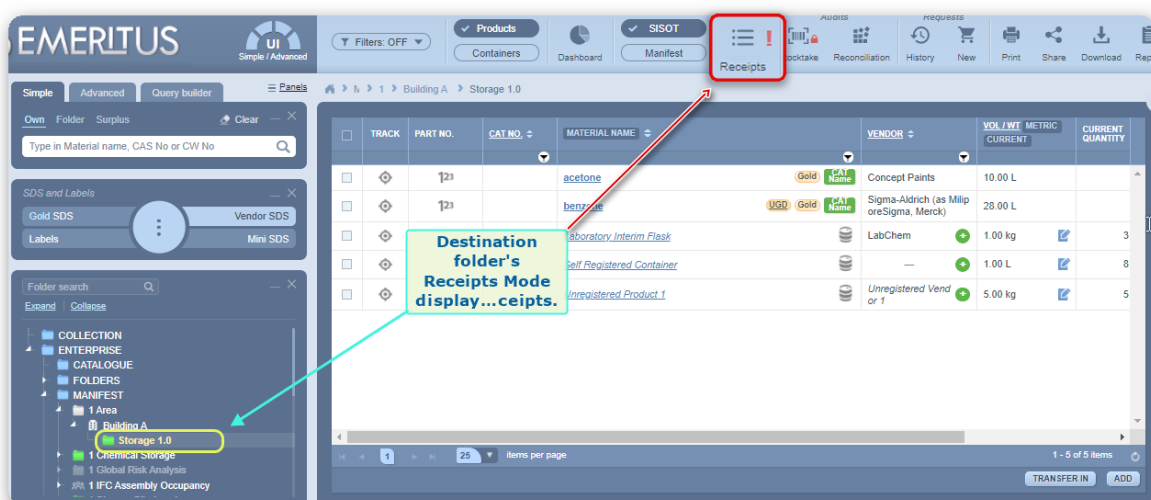
Column Title/Button	Description	Filter Type	Notes
<b>FROM</b>	<p>The track icon  locates the source folder for the transfer request T-XXXX from within the folder tree panel which will expand the tree structure in receipts mode to highlight the specific folder/location.</p>	Not applicable	Requests are designated identity number R-XXXX. Allocated items are collected from the store (shop folder) whereas ordered items are collected from the delivery location.
<b>REQUEST ID</b>	<p>T-XXXX is a transfer identity number. R- XXXX is a shopping request identity number.</p>	 Contain/Equals	Receipts are displayed by Request ID. Orders can be sorted by ascending or descending order  .
<b>REQUEST DATE</b>	Transaction request date.	 Equals, Earlier, Later,	Choose the applicable date from calendar icon  or filter by specific date.
<b>REQUESTOR</b>	<p><b>Conducting a transfer</b> - user who has Read + Write permission to source and destination folder and can scan/drag &amp; drop/manually add transferred items from the source folder.</p>	 Contain/Equals	Folder permissions define the role of the various users based on given privileges to transact Sisot related content.



Column Title/Button Description	Filter Type	Notes
<p><b>Request a transfer</b> – user with Read access to source folder and can and transfer request items from the source folder.</p> <p><b>Shopping</b> – user who can conduct a shopping request as a shopping requester</p>		
<p><b>CAT NO.</b></p> <p>Product Catalogue number if available or assigned</p>	 Contain/Equals	When the filter is on (applied) the ScanIn/Accept/Decline button will be hidden.
<p><b>CAT NAME / MATERIAL NAME</b></p> <p>This is the product catalogue name or material name</p>	 Contain/Equals	Switch between Cat Name and Material Name.
<p><b>VENDOR</b></p> <p>This is header title for Vendor Name (Manufacturer or Supplier).</p>	 Contain/Equals	Filter pending items by contains part of the name or equals to (for an exact match).
<p><b>REQUESTED QUANTITY</b></p> <p><b>Conducting a transfer</b> The transferred items quantity from the source folder will be displayed in this column.</p> <p><b>Request a transfer</b> Request transfer quantity from the source folder.</p> <p><b>Shopping</b> Request quantity for the requested products for the shopping request.</p>	Not applicable	This is the requested quantity per the request ID.
<p><b>RECEIVED QUANTITY</b></p> <p>Input value box (field) to input the received quantity after scanning in the barcode item(s).</p>	Not applicable	Input value field linked to Scan In of barcode(s).
<p><b>COMPATIBILITY</b></p> <p>Compatibility analysis with stored items based the hazard category or dangerous good classification.</p>	Not applicable	A green tick  designates compatible materials. A red cross  designates incompatible materials.
<p><b>BARCODES</b></p> <p>Barcodes identity number(s) which were transferred to the folder location. If there's more than one barcode, this column will display the word "Multiple" as a link to enable user to open the list of multiple barcodes to make a choice on which barcode(s) to transact.</p>	Not applicable	The barcodes window shows al the transferred barcodes for the requested items.
<p><b>SCAN IN</b></p> <p>The Scan In button enables user to activate scan mode for the first click  and deactivate the scan mode in the second click .</p>	Not applicable	<p>First click  on Scan In when active will be accompanied by a confirmation message for that particular request ID.</p> <p>Second click  on Scan In when deactivated will be accompanied by respective message for deactivated scan mode.</p>
<p><b>DECLINE</b></p> <p>Declines the entire receipt for that line item.</p>	Not applicable	Decline the transfer request for each line item.

Column Title/Button Description	Filter Type	Notes
 Accepts the transactional line item	Not applicable	Accept when button is active. Once the accept button is selected, it defaults to a greyed-out button  . User can only accept a line item once.
 Expand all rows for the requests	Not applicable	Expand all requests – single or grouped requests to view details.



The next step is to process the transfers generated in Section 2: The Transfer Process.

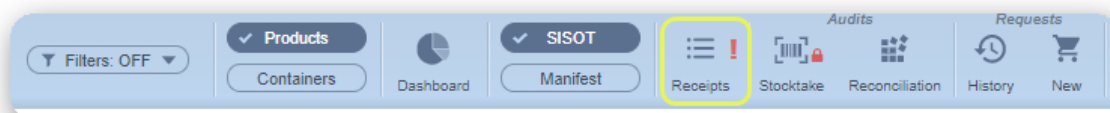
## 4.1 Scan and Accept Pending Receipts






**i** Note that the Receipts button  will display a “Red Exclamation Mark”  for pending receipts. The next step of the transfer process is to scan and accept the pending receipts into the destination folder. Recall which type of transfer outcomes are possible based on user permissions.

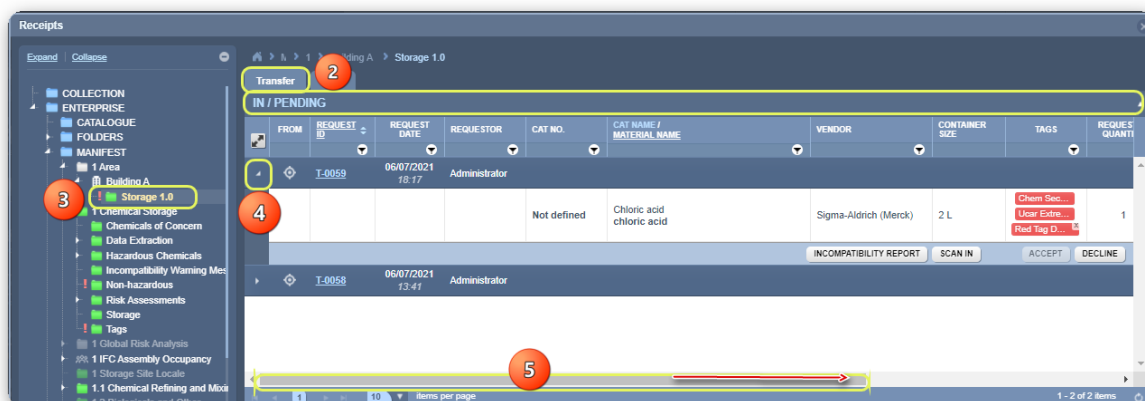
### Steps: Scan and Accept pending receipts in Receipt Mode


1. Select  the **Receipts mode** button with the “Red Exclamation Mark”  on the Sisot toolbar.

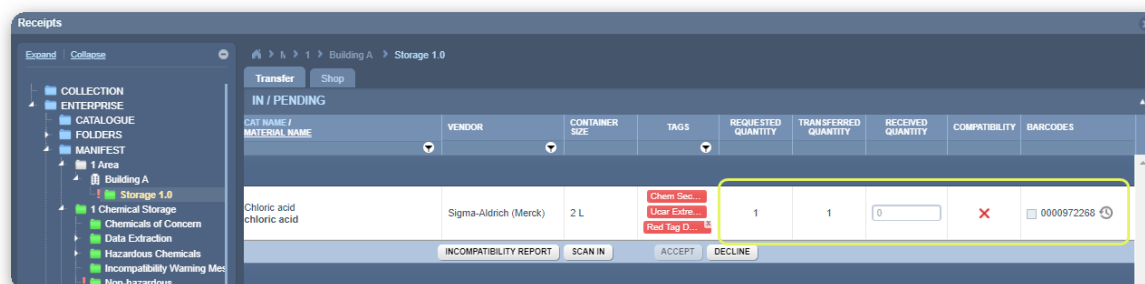



2. Select  the **Destination folder** with the **Red Exclamation Mark** . Note that the Transfer tab is active by default.
3. Receipts mode defaults to the **Transfer** tab with the respective transfer details provided in the columnar cells; the request ID for the transfer, request date, requester, cat name, container

size, requested quantity, transfer quantity, compatibility, barcodes. Press  the **folder** location with the exclamation mark for receipts.




- Press  the **forward arrow** alongside the transfer item's row to expand for more details about the transfer ID.
- Slide the **Scrollbar** towards the right to view more information on the transfer grid; Requested Quantity, Transferred Quantity, Received Quantity, Compatibility and Barcodes.





- Press  the **Scan In** button.
- Scan the container barcode(s)** or type the barcode number, e.g. 000972268 & press enter on your keyboard. A message displays for the successfully scanned item.

Use the **Action Barcodes** option to activate Transfer In.


 Scan the **Container Barcode**


**Hint:** The received quantity value in the In/Pending tab will increase from 0 to 1, etc., depending on the number of containers scanned versus the requested quantity.

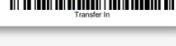
  0000972274


**NEW REQUEST MODE**


Transfer


 Start Scan


 Submit


 Transfer ID








 0000972274


































































































































































































































































































































































































































































































































































































































































































































Item successfully scanned!

Building A > Storage 1.0

Transfer Shop

IN / PENDING

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
Chloric acid chloric acid	Sigma-Aldrich (Merck)	2 L	Chem Sec... Usar Extre... Red Tag D...	1	1	1	×	0000972268

INCOMPATIBILITY REPORT SCAN IN ACCEPT

9. Press the Yes button to accept the incompatibility where it is reflected.

Warning!

Incompatibility has been found. Would you like to accept this incompatibility?

YES NO

If incompatibility is flagged in the grid, you may provide comments on the “Warning” Notes section and click the “Save” button.

Warning!

PLEASE PROVIDE COMMENTS

Note that distances between incompatible containers has been approved to store incoming receipts in the same room as the amounts are small.

Type your incomaptibility notes in the text field here.

SAVE CANCEL

10. Press  the Yes button to accept any maximum volume exceeded.

Max volume exceeded

The set volume has exceeded the maximum for this material.  
Do you want to set this new value as the new maximum volume?

- Chloric acid

YES CANCEL

**Hint:** If ‘Yes’ is selected, this action will set the new value as the maximum volume/weight. The folder exclamation mark for the receipt will disappear confirming the successful transfer in folder action.

11. Press the **InHistory** tab to confirm successful transfer for requested quantity, transferred quantity and received quantity.

Click  the **Track** icon  alongside a transfer request ID to locate folder location.

The screenshot displays the 'Receipts' application interface. On the left, a sidebar shows a hierarchical tree structure under the 'COLLECTION' and 'ENTERPRISE' categories. The 'Huntingwood' location is selected, indicated by a green dot and a dashed yellow arrow pointing to the main content area. The main content area shows a list of receipts. The first receipt is highlighted with a yellow box, showing details for '1 Chemical Storage' on '24/09/2020' at '13:47', requested by 'Administrator'. The receipt is in a 'PENDING' state, as indicated by the 'IN / PENDING' label. The interface includes buttons for 'Transfer' and 'Shop' at the top of the receipt details. The table headers for the receipt list are: FROM, REQUEST ID, REQUEST DATE, REQUESTOR, CAT NO., CAT NAME / MATERIAL NAME, and VENDOR.

**Transfer** | Shop

**IN / PENDING**

FROM	REQUEST ID	REQUEST DATE	REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	STATUS
	T-0037	05/02/2019 18:44	Administrator		trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazardous Red Tag D N/Z Regs GOC X	1	1	<input type="text" value="0"/>	X	<input type="checkbox"/>
<a href="#">INCOMPATIBILITY REPORT</a> <a href="#">SCAN IN</a> <a href="#">ACCEPT</a> <a href="#">DECLINE</a>													
	T-0036	05/02/2019 17:48	Administrator		acetone	3M	10 L	CLP Hazardous Red Tag D GOC X	3	3	<input type="text" value="0"/>	✓	MU
					Thinner acetone	ChemTools	10 L	CLP Hazardous Red Tag D GOC X	1	1	<input type="text" value="0"/>	✓	<input type="checkbox"/>
<a href="#">SCAN IN</a> <a href="#">ACCEPT</a> <a href="#">DECLINE</a>													

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC	1	1	0	×	0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								
acetone	3M	10 L	CLP Hazar... Red Tag D... CoC	3	3	0		Multiple 0000972161 0000972160 0000972159
Thinner acetone	ChemTools	10 L	CLP Hazar... Red Tag D... CoC	1	1	0	✓	0000972066
SCAN IN ACCEPT DECLINE								

### Temporarily Hide Receipts Columns

Note that with the “mouse right click” on any of the column area of the user interface provides a list of columns to temporarily hide from the grid. Simply uncheck the box(es) to hide columns or check a box to show column.

REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	Columns	VENDOR	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
Administrator			<input checked="" type="checkbox"/> From <input checked="" type="checkbox"/> Request ID <input checked="" type="checkbox"/> Request <input checked="" type="checkbox"/> Date <input checked="" type="checkbox"/> Requestor <input checked="" type="checkbox"/> Cat No. <input checked="" type="checkbox"/> Cat Name / Material Name <input checked="" type="checkbox"/> Vendor <input checked="" type="checkbox"/> Container <input checked="" type="checkbox"/> Size <input checked="" type="checkbox"/> Tags <input checked="" type="checkbox"/> Requested Quantity <input checked="" type="checkbox"/> Transferred Quantity <input checked="" type="checkbox"/> Received Quantity <input checked="" type="checkbox"/> Compatibility <input checked="" type="checkbox"/> Barcodes	Merck	CLP Hazar... Red Tag D... NZ Regs CoC	1	1	0	×	0000972051
Administrator					INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE					
Administrator				3M	CLP Hazar... Red Tag D... CoC	3	3	0	✓	Multiple
				ChemTools	CLP Hazar... Red Tag D... CoC	1	1	0	✓	0000972066
SCAN IN ACCEPT DECLINE										

### Compatibility Check

The receipts provide a Compatibility check ✓ before the containers are added to the destination folder for the folder owner/requester to confirm or check compatibility requirements with existing containers. If the container that is being transferred does not meet the compatibility compliance, a red cross will be displayed instead of a green tick ✓.

CAT NAME / MATERIAL NAME		CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC	1	1	0	×	0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								
acetone	3M	10 L	CLP Hazar... Red Tag D... CoC	3	3	0	✓	Multiple
Thinner acetone	ChemTools	10 L	CLP Hazar... Red Tag D... CoC	1	1	0	✓	0000972066
SCAN IN ACCEPT DECLINE								

### Cat Name/Material Name Header drop down option

CAT NAME / MATERIAL NAME

The Cat Name/Material Name header can be used to view the requested items in either **Cat Name** or **Material Name** view. If Cat Name is the selected header, then Cat Name only will be displayed in grid and vice versa will also apply for Material Name. Click on either option to display the desired name type.

### Cat Name View

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
trichloroethane 1,1,1-trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC	1	1	0	×	0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								

### Material Name View

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	TRANSFERRED QUANTITY	RECEIVED QUANTITY	COMPATIBILITY	BARCODES
1,1,1-trichloroethane trichloroethane	Merck	20 L	CLP Hazar... Red Tag D... NZ Regs CoC	1	1	0	×	0000972051
INCOMPATIBILITY REPORT SCAN IN ACCEPT DECLINE								








### OUT/PENDING in Transfer Tab






The transfer tab for OUT/PENDING items contains the following columns described in the table below:

OUT / PENDING										
TO	REQUEST ID	REQUEST DATE	REQUESTOR	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUEST QUANTITY	



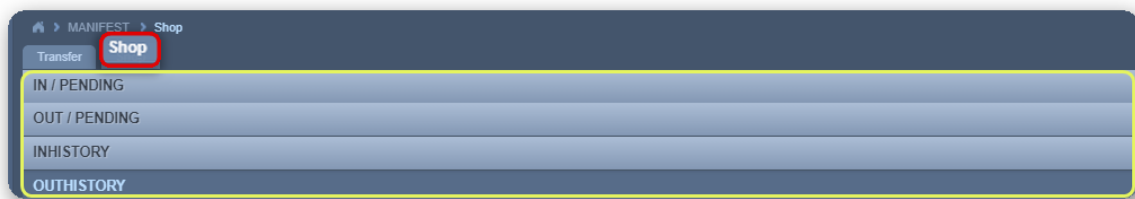
Users will scan out the requested items in Receipts Out/Pending in the Transfer tab. The number of barcodes which are scanned out will be the number of the transferred quantity. The transfer quantity cannot be larger than the requested quantity. If users scan out any barcodes which do not match the requested product containers, then a message “Not a valid barcode” will be displayed to keep the user informed in each step of the process. If users scan out more container quantity than requested, then the system will show the message “The requested product has been scanned out fully”.

Column Title/Button Description	Filter Type	Notes
<b>TO</b> The destination folder for the type of request <b>“request a transfer”</b>	Not applicable	User will click  on the track icon to identify the destination folder. The folder panel will highlight the destination folder for the request. The deleted folder will be highlighted if the destination folder has been removed. The track icon will be disabled if the user has no access to the destination folder.
<b>REQUEST ID</b> This column show the T-XXXX <b>transfer identity number</b>	 Contain/Equals	Receipts are displayed by Request ID with the descending orders. Orders can be sorted by ascending or descending order  .
<b>CAT NO.</b> Product’s <b>catalogue number</b> if available or assigned is displayed in this column	 Contain/Equals	When the filter is on (applied) the ScanIn/Accept/Decline button will be hidden.
<b>CAT NAME / MATERIAL NAME</b> This is the <b>product’s catalogue name</b> or <b>material name</b>	 Contain/Equals	Switch between Cat Name and Material Name. When the filter is on (applied) the ScanIn/Accept/Decline button will be hidden.
<b>VENDOR</b> This is header title for <b>Vendor Name (Manufacturer or Supplier)</b> .	 Contain/Equals	Filter pending items by “contains part of the name or equals to (for an exact match)”. When the filter is on (applied) the ScanIn/Accept/Decline button will be hidden.
<b>REQUESTOR</b> <b>Users</b> who have read only permission to the source folder who have <b>requested a transfer</b> will be listed under this column Add transfer request items from the source folder.	 Contain/Equals	Folder permissions define the role of the various users based on given privileges to transact Sisot related content.
<b>TRANSFERRED QUANTITY</b> <b>Transferred quantity</b> column contains an input box field for <b>number</b> (integer) inputs.	Not applicable	The transfer quantity must be smaller or equal to requested quantity.
<b>BARCODES</b> <b>Barcodes identity number</b> transferred to the folder location will display in this column. If there’s more than one barcode, this column will display the word “ <i>Multiple</i> ” as a link to enable user to open the list of multiple barcodes to make a choice on which barcode(s) to transact.	Not applicable	The barcodes window shows al the transferred barcodes for the requested items.

Column Title/Button Description	Filter Type	Notes
<b>REQUEST DATE</b> This column will show the date of the transaction request in the DAY/MONTH/YEAR, HOUR: MIN format: DD/MM/YY HH:MM	 Equals, Earlier, Later,	Choose the applicable date from calendar icon  or filter by specific date.
<b>CONTAINER SIZE</b> Product container size	No filter	Size of the container as per the order with unit measure.
<b>TAGS</b> Tags assigned to the material (if any exists in the domain account). Note that tags are optional.	Tags drop down list	Depends on whether the administrator has created tags associated those for specific materials for ease of identification with health and safety aspect of the material or otherwise intended.
<b>REQUESTED QUANTITY</b> <b>Conducting a transfer</b> The transferred items quantity from the source folder. <b>Request a transfer</b> Request transfer quantity from the source folder. <b>Shopping</b> Request quantity for the requested products for the shopping request.	Not applicable	This is the requested container quantity.
<b>SCAN OUT</b> <b>Scan Out</b> button to activate scan mode to move the container to the destination folder.	Not applicable	First click  on “Scan Out” button will activate scan mode. Second click  on “Scan Out” button will deactivate scan mode. In each of these clicks, respective message will be shown in the top middle area of the user interface to keep user informed on the status of the action undertaken.
<b>ACCEPT</b> <b>Accept</b> button must be used to partially or fully receipt out	Not applicable	First click  on “Accept” button will default it to a greyed-out button. A container can only be accepted once.
<b>DECLINE</b> <b>Decline</b> button must be used when rejecting the whole request	Not applicable	The product container quantity will be retained in the source folder when request is declined.

## 4.2 Overview Description of the Receipts Shop Tab

### THE RECEIPTS SHOP TAB



The shop tab is structured in PENDING and HISTORY tabs which house all transfers that are pending and history records of transacted line items respectively.

- IN/PENDING - Incoming pending line items
- OUT/PENDING – Out pending line items
- IN HISTORY – Records of incoming transacted items
- OUT HISTORY – Records of outgoing transacted items

### IN/PENDING in SHOP Tab

The shop tab for pending items contains the following columns described in the table below:

Receipts

>

MANIFEST

>

Laboratory


TRANSFER

SHOP

IN / PENDING

VENDORS & SUPPLIERS	ORDER NO.	CAT NO	CAT NAME	VENDOR NAME	CONTAINER SIZE	TAGS	ORDERED QUANTITY	RECEIVED QUANTITY	RECEIVED DATE	BARCODES
Fisher Scientific	O-0079	Unspecified	Thinner	Fisher Scientific	5kg	hello PKG II	1	1	08/01/2018	11111150029
<div>SUBMIT</div>										

Column Title/Button Description	Filter Type	Notes
<b>VENDORS / SUPPLIERS</b> Vendor/Supplier for the order that was placed to	 Contain/Equals	Default sorting by ascending order .
<b>ORDER NO.</b> O-XXXX is an order identity number associated with the destination folder or source folder. O- XXXX-S is a re-stock order number associated with the source folder and destination older for the shopping request.	 Contain/Equals	Source folder is equivalent to the destination folder. <i>Source folder = destination folder</i>
<b>CAT NO.</b> Product Catalogue number if available or assigned	 Contain/Equals	For items without Cat No. defined, the value is assigned "Unspecified".
<b>CAT NAME</b> This is the product catalogue name	 Contain/Equals	Cat name is displayed.
<b>VENDOR NAME</b> This is the product vendor or manufacturer/supplier	 Contain/Equals	Filter pending items by contains part of the name or equals to (for an exact match).
<b>CONTAINER SIZE</b>	No filter	Size of the container as per the order.












Product container size		
<b>TAGS</b> Tags assigned to the material (if any). Tags are optional.	Tags drop down	Depends on whether the administrator has created tags associated those for specific materials for ease of identification with health and safety aspect of the material or otherwise intended.
<b>ORDERED QUANTITY</b> Quantity ordered from the Vendor/Supplier.	Not applicable	Quantity value/number as per the order.
<b>RECEIVED QUANTITY</b> Quantity received from the Vendor/Supplier.	Not applicable	Quantity identifies how much quantity was received.
<b>RECEIVED DATE</b> Identifies the date(s) when deliveries were received from the Vendor/Supplier.	Not applicable	Column can have 2 states: <ul style="list-style-type: none"> <li>Column has a date – single receive was completed</li> <li>Column has multiple button – multiple receives were done</li> </ul>
<b>BARCODES</b> This column contains barcodes that the storeperson scanned in during the receive process.	Not applicable	When there's only one barcode, the barcode identity number is displayed but when there's multiple barcodes for more than one container item, then the text link " <b>Multiple</b> " is displayed. Clicking  on the Multiple link will open the barcode pop up window to list all container barcodes.
<b>SUBMIT</b> The "Submit" button enables the user to send requested the order to the recipient's destination folder location's receipt in/pending transfer tab.	Not applicable	Submitting an order is dispatching it to the destination's folder's transfer receipts tab and will also show in the OUTHISTORY tab.






## OUT/PENDING in SHOP Tab



The transfer tab for OUT/PENDING items contains the following columns described in the table below:

OUT / PENDING											
TO	REQUEST ID	REQUEST DATE	REQUESTOR	CAT NO	MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUESTED QUANTITY	ALLOCATED QUANTITY	ISSUED QUANT

Users will scan out the requested items in Receipts Out/Pending transfer tab. The number of barcodes which are scanned out will be the number of the transferred quantity. The transfer quantity cannot be larger than the requested quantity. If users scan out any barcodes which are not for the requested product containers, then a message "Not a valid barcode" will be displayed to keep the user informed in each step of the process. If users scan out more containers quantity than requested quantity, then the system will show the message "The requested product has been scanned out fully".

Column Title/Button Description	Filter Type	Notes
<b>TO</b> The final storage location of the <b>Shopping Request</b>	Not applicable	User will click  on the track icon to identify the final storage folder. The folder panel will highlight the destination folder for the request. The deleted folder will be highlighted if the destination folder has been removed. The track icon will be disabled if the user has no access to the destination folder.
<b>REQUEST ID</b> This column shows the R-XXXX <b>Request Identity Number</b> . Clicking  on the request ID/number hyperlink triggers the message “The request # is selected” which mean that the request is ready to be scanned out.	 Contain/Equals	Receipts are displayed by Request ID with the descending orders. Orders can be sorted by ascending or descending order  .
<b>CAT NO.</b> Product’s <b>Catalogue Number</b> if available or assigned; shall be displayed in this column.	 Contain/Equals	When the filter is on (applied) the ScanIn/Accept/Decline button will be hidden.
<b>CAT NAME</b>  This is the <b>Product’s Catalogue Name</b> . Switch between Cat Name and Material Name from drop down.	 Contain/Equals	When the filter is on (applied) the ScanIn/Accept/Decline button will be hidden.
<b>VENDOR</b> This is header title for <b>Vendor Name (Manufacturer or Supplier)</b> .	 Contain/Equals	Filter pending items by “contains part of the name or equals to (for an exact match)”. When the filter is on (applied) the ScanIn/Accept/Decline button will be hidden.
<b>REQUESTOR</b> This column will display the <b>Shopping Requester</b> .	 Contain/Equals	Folder permissions define the role of the various users based on given privileges to transact Sisot related content.
<b>BARCODES</b> <b>Barcodes Identity Number</b> transferred to the folder location will display in this column. If there’s more than one barcode, this column will display the word “ <i>Multiple</i> ” as a link to enable user to open the list of multiple barcodes to make a choice on which barcode(s) to transact.	Not applicable	The barcodes window shows al the transferred barcodes for the requested items.
<b>REQUEST DATE</b> This column shall display the <b>date the shopping requester initiated the requisition</b> : Date/Time Format: DD/MM/YY HH:MM.	 Equals, Earlier, Later,	Choose the applicable date from calendar icon  or filter by specific date.
<b>CONTAINER SIZE</b> Product container size	No filter	Size of the container as per the order with unit measure.








Column Title/Button Description	Filter Type	Notes												
<div>TAGS</div> <p>Tags assigned for the material (if any). Tags are optional.</p>	Tags drop down list	Depends on whether the administrator has created tags associated those for specific materials for ease of identification with health and safety aspect of the material or otherwise intended.												
<div>REQUESTED QUANTITY</div> <p><b>Shopping</b> This column shall display the quantity for the requested item</p>	Not applicable	This is the requested container quantity as per the shopping request.												
<div>ALLOCATED QUANTITY</div> <p><b>Allocated Quantity</b> for the requested item shall be displayed in this column</p>	Not applicable	This is the allocated container quantity as per the shopping request. This value is the sum of allocated and received orders in shop folder.												
<div>ISSUED QUANTITY</div> <p><b>Issued Quantity</b> for the requested item shall be displayed in this column</p>	Not applicable	This is the issue container quantity as per the shopping request.												
<div>PRINT PICKING SLIP</div> <p><b>Print Picking Slip</b> button enables the storeperson to generate the information pertaining to the shopping request prior to scanning out the respective container(s). The picking slip barcode must be used to activate the picking slip mode for the transfer as per the order. The storeperson can print two picking slips; one for the store picking and the other to issue it to shopping requester as reference.</p>	Not applicable	Picking Slip is a convenient tool for the storeperson as it contains information about the request; Request no., activation barcode, cat name, vendor, container size, allocated number, the order number, delivery location and the pick time (dd/mm/yy hh:min:sec). Shelf location will show folder name for allocated items. However, the order number will be shown for ordered items instead.												
<div>Picking Slip Example Sheet</div> <div><div><div>Request No.: <b>R-0120</b></div><div>Requestor: <b>Administrator</b></div><div>Destination: <b>Laboratory</b></div></div><div></div><table><tr><th>CAT NO.</th><th>CAT NAME/ MATERIAL NAME</th><th>VENDOR NAME</th><th>CONTAINER SIZE</th><th>ALLOCATED</th><th>SHELF LOCATION</th></tr><tr><td></td><td>Thinner/ acetone</td><td>Fisher Scientific</td><td>5 kg</td><td>1</td><td>Order No. O-0079</td></tr></table><div>08/01/2018 12:15:44</div></div>			CAT NO.	CAT NAME/ MATERIAL NAME	VENDOR NAME	CONTAINER SIZE	ALLOCATED	SHELF LOCATION		Thinner/ acetone	Fisher Scientific	5 kg	1	Order No. O-0079
CAT NO.	CAT NAME/ MATERIAL NAME	VENDOR NAME	CONTAINER SIZE	ALLOCATED	SHELF LOCATION									
	Thinner/ acetone	Fisher Scientific	5 kg	1	Order No. O-0079									
<div>SCAN OUT</div> <p><b>Scan Out</b> button to activate scan mode to move the container to the destination folder. Once a shopping request is submitted, the Scan Out button is removed for that line item and system will show the button “ISSUED”. In the case when not all items are scanned but the submit button is clicked  the message “Please scan all items in a request” shall display.</p>	Not applicable	<p>First click  on “Scan Out” button will activate scan mode. Second click  on “Scan Out” button will deactivate scan mode. In each of these clicks , respective message will be shown in the top middle area of the user interface to keep user informed on the status of the action undertaken.</p>												

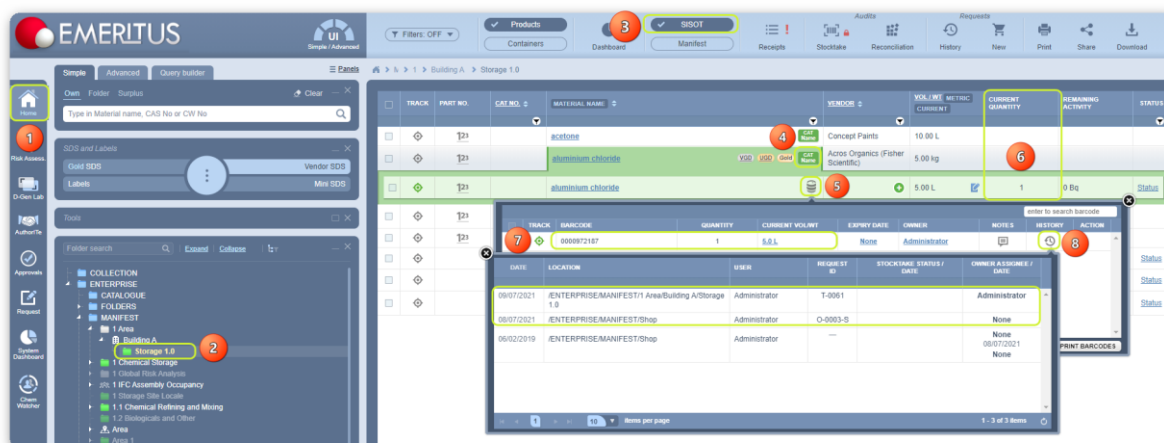
Column Title/Button Description	Filter Type	Notes
<b>ISSUED</b> <b>Issued</b> button displays after scanning out is actioned. Once a receipt is issued, the record will be removed from the receipt out mode and show in receipt out history of the shop tab.	Not applicable	Clicking  on the “Issued” button shall display a list of issued items in a pop-up window.
<b>ACCEPT</b> <b>Accept</b> button must be used to partially or fully receipt out	Not applicable	First click  on “Accept” button will default it to a greyed out button. A container can only be accepted once.
<b>DECLINE</b> <b>Decline</b> button must be used when rejecting the whole request	Not applicable	The product container quantity will be retained in the source folder when request is declined.

#### 4.2.1 Confirm Shopping Request in Destination Folder

The next step in the process is to confirm received requested item from the Shop Folder (Storeperson). The requester must login to the application to view the container information for the received item. The steps below show how to check the destination folder as per the request.

##### Steps: Received Item from a Shop folder to Destination folder

1. Select  the **home** module button .
2. Select  a **Destination folder**  under the Manifest directory.
3. Click  on the **Sisot** button from Sisot toolbar.
4. Press  the **Cat Name** button alongside the requested item.
5. Confirm the container’s **current quantity received**.
6. Click  on the **Container icon** to view the details, e.g., container barcode.
7. Click on the **History** icon to view further details about the request/transfer from the Shop Folder.







## 5.0 Stocktake & Reconciliation

HOME | SISOT | STOCKATE & RECONCILIATION

This topic will cover the following objectives;

- How to schedule a stocktake for a folder/location inventory
- How to conduct a stocktake
- How to set container statuses during stocktake
- How to perform reconciliation
- How to generate stocktake and reconciliation data reports



Generally, stocktake refers to the process of physically checking stock levels for each company or organisation's products and materials to make sure that the data is up to date and accurate for a variety of purposes such as conducting audits or generating reports for business decisions that may affect the operations of the business. There are various techniques of stocktaking.

- Periodic counting of stock
- Continuous counting of stock
- Pick accuracy
- Stockout validation
- Annual stocktake

A stocktake is one of the central processes of good inventory management and it is a mandatory requirement for most retailers to produce stocktake reports at the end of fiscal year. It is a good and sound business monitoring process to increase profits, reduce loss, improve control, and reduce waste. The responsibility of stocktaking can vary from one organisation to another; but in general, a storeperson in charge of a store may provide regular stocktake summary reports on an ongoing basis; whereas an accounting functionary may be responsible for the stocktake of assets.

What is "Stocktake & Reconciliation" in Sisot?

Stocktake allows business and organisations to schedule and complete stocktake(s) of their products and identify missing or misplaced stock. In turn, after completing a stocktake, reconciliation will identify locations of missing products by matching their unique barcodes

within other folder locations. Stocktake mode provides users the ability to verify the quantities and statuses of containers held in a physical locations against the system's records. Reconciliation mode analyses and balances between stocktake results and the system records, giving users the opportunity to review the report before users can update the inventory against the stocktake results.

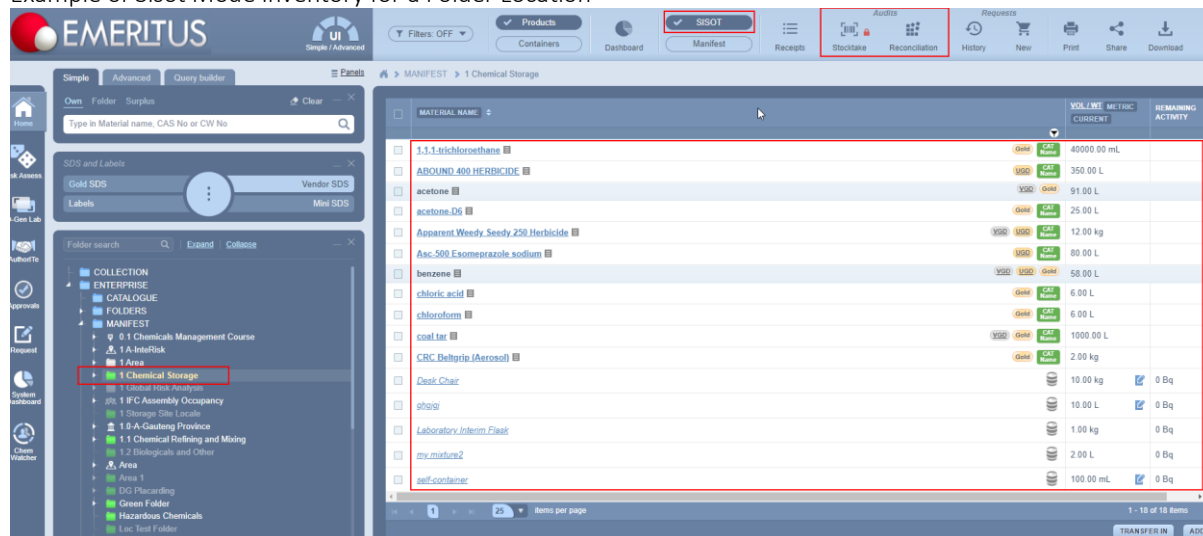
## Important Notes

Generally, users have the capacity to transact, transfer, add containers and receive items from the Shop Folder even after the stocktakers have saved the stocktake and before the inventories are updated. Chemwatch does not encourage users to change their inventory (including adding containers) or conduct any physical transfers in the real world during any stocktake period as the system can only update the inventory according to users action sequence. Although the system will not create any duplicate barcodes or remove a container when users utilise the Sisot features such as transfer or add new containers; however, users may not be able to figure out what happened when other users may have made changes to the system. Therefore, Chemwatch advises to conduct transfers, add/edit inventory records only when it is necessary to do so. Otherwise, all transfers will be banned when a folder location in the system is in the process of stocktake & reconciliation.

## Setting Up a Stocktake Plan

The system administrator will be responsible for setting up a stocktake plan for all selected locations and announce the stocktake plan to the respective users. Setting up a stocktake plan will not be covered in this manual as it is strictly an administrative function. However, once a stocktake plan has been scheduled and information shared with the folder/location owners, those users will take note of the stipulated stocktake duration (i.e. the start and end date). A stocktake cannot be conducted outside the scheduled stocktake plan.

### Example of Sisot Mode Inventory for a Folder Location

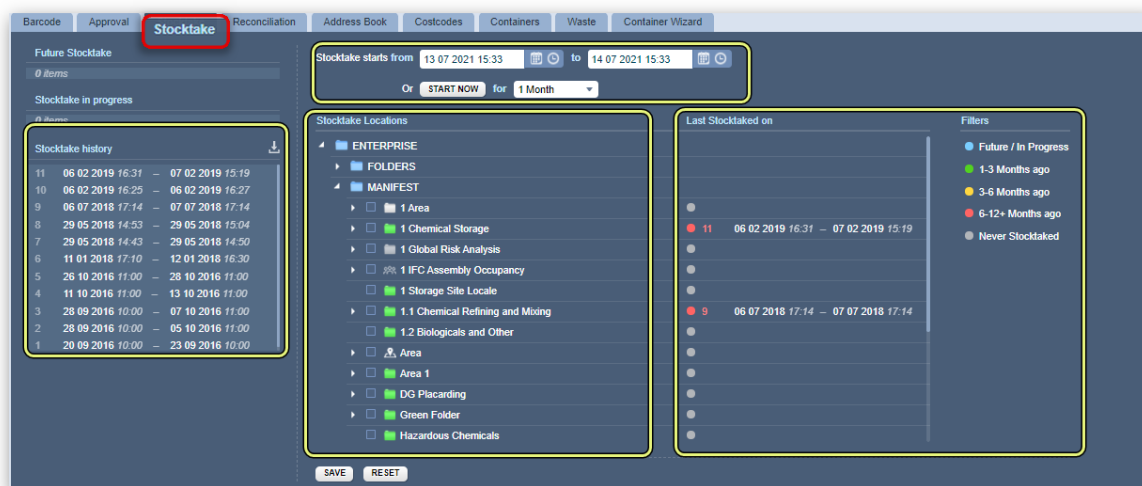


MATERIAL NAME	UNIT	QUANTITY	WEIGHT	METRIC	REMAINING ACTIVITY
1,1,1-trichloroethane	Gold	40000.00	40000.00	mL	
ABOUND 400 HERBICIDE	USD	350.00	350.00	L	
acetone	USD	91.00	91.00	L	
acetone-D6	Gold	25.00	25.00	L	
Asperant Weedy Seedy 250 Herbicide	USD	12.00	12.00	kg	
Asc 500 Esomeprazole sodium	USD	80.00	80.00	L	
benzene	USD	58.00	58.00	L	
chloric acid	Gold	6.00	6.00	L	
chloroform	Gold	6.00	6.00	L	
coal tar	USD	1000.00	1000.00	L	
CRC Belgrip (Aerosol)	Gold	2.00	2.00	kg	
Desk Chair		10.00	10.00	kg	0 Bq
shovel		10.00	10.00	L	0 Bq
Laboratory Interim Flask		1.00	1.00	kg	0 Bq
my mixture2		2.00	2.00	L	0 Bq
self container		100.00	100.00	mL	0 Bq






## Stocktake Settings

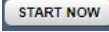

Stocktake Settings contain the stocktake scheduling function to set-up a new stocktake. This function enables users who have the right to administer a stocktake to schedule current or future stocktakes, and view stocktake history, download a stocktake summary report. Stocktake mode contains these components:

- Stocktake history
- Future stocktake
- Stocktake in progress
- Stocktake start and end time or duration
- Stocktake locations/folders
- Stocktake filters



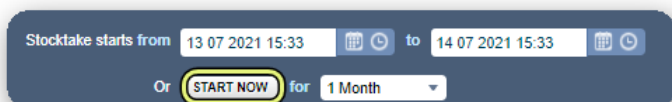
An important new feature is the ability to filter the folders' structure/locations for stocktakes as follows:

Filter	Colour Code	Stocktake Description
	Blue	Filters stocktakes scheduled in the future or current.
	Green	Filters stocktakes within 1-3 months ago.
	Orange	Filters stocktakes within 3-6 months ago.
	Red	Filters stocktakes within 6-12 months ago.
	Grey	Filters folders that were never stocktaken.

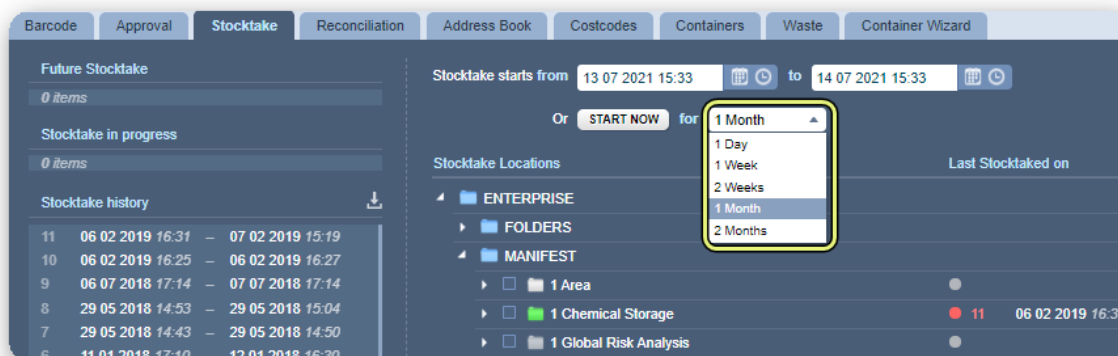
The “Start Now”  and Stop  buttons are to schedule a stocktake for a particular folder location. These settings are enabled by the domain administrator or sub-administrator or users (who have been granted permission to schedule a stocktake).

After login into the application and have been granted stocktake permission, go to **Settings**  **/Sisot Settings /Stocktake tab**  to set up a stocktake plan.


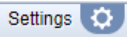







For example, an immediate stocktake can be started with the ‘Start Now’ button and set for the duration of 1 day, but if a user finished it earlier; then the ‘Stop’ button can be used to end the stocktake and proceed with Reconciliation.

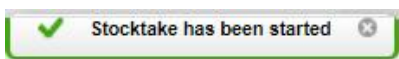


Choose the applicable timeframe from the dropdown list; 1 day, 1 week, 2 weeks, 1 month or 2 months.

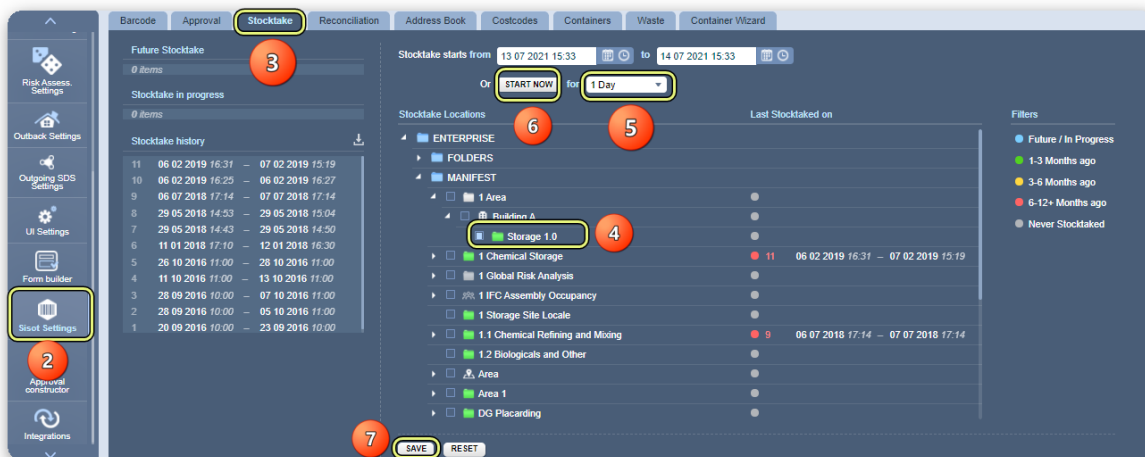


### Steps: Setting Up a Stocktake in Stocktake Settings

1. Select  the **Settings** module link  at the top left area of the user interface.
2. Press  the **Sisot Settings** mode button .
3. Click  on the **Stocktake** tab.
4. Press  the **Folder/Location name**  under the Manifest directory.
5. Select  the **drop-down arrow to set a day, week, or month(s)** for the duration of the stocktake plan.
6. Press  the **Start Now** button to activate the stocktake for that selected folder/location. Confirmation message displays that the stocktake has been started.

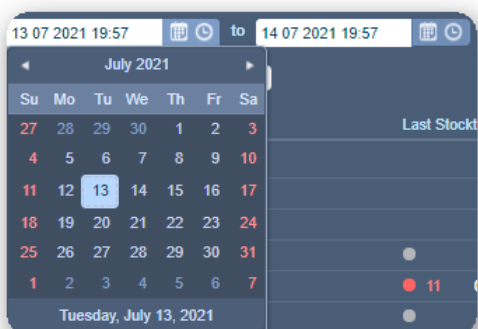


7. Press  the **Save** button.

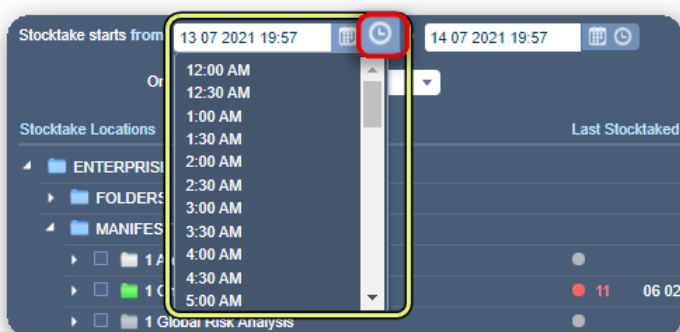


Stocktake scheduling to a specific date and time is also available, i.e., **Start and End time of the stocktake** can be chosen from the date and time picker.

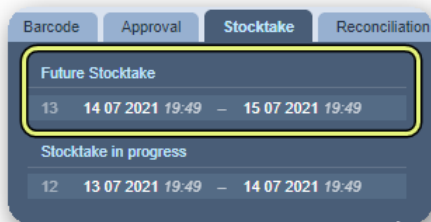
Date picker 



Time Picker 

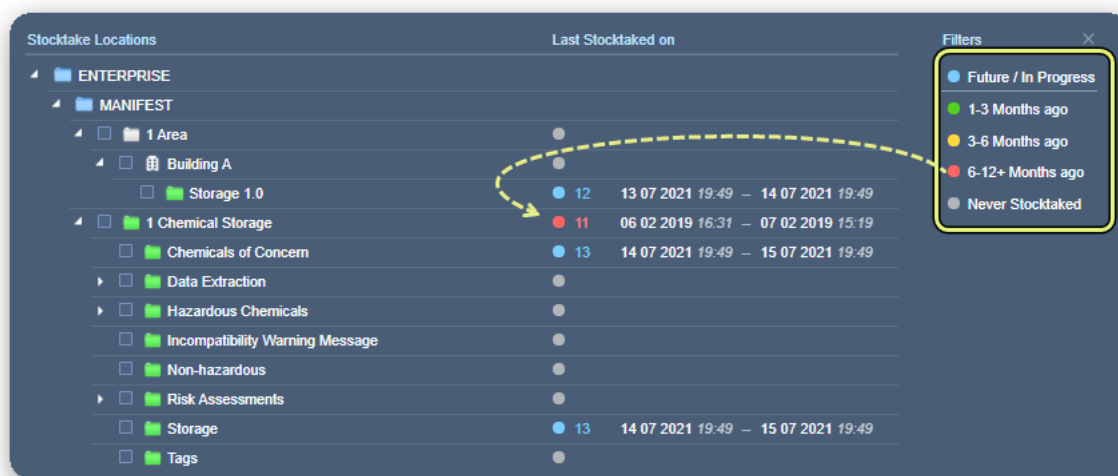


Once the date and time has been set and stocktake plan saved, the “Future Stocktake” and/or Stocktake in progress will be shown on the top left area of the user interface.



## Filter Stocktake Schedule Conducted






Use the stocktake filter to identify the respective stocktake carried in the future or current or in the past. The example below would be reflective of a mid-year or an annual stocktake.



Click **Back** button  from the top left corner of the user interface to go back to the Home module.

## Stocktake Mode Lock/Unlock Status in Sisot Toolbar

The stocktake mode will be unlocked automatically for the selected folder/location at the start time of the stocktake set date and will be locked again when the stocktake plan end time is reached or stocktake scheduled is elapsed.

Stocktake Status	Stocktake Button	Image	Message
Unscheduled	Locked keylock icon is displayed for the selected folder		Clicking  on the stocktake button (with locked icon) will show the message <i>"No stocktake is scheduled for the current folder. Please contact system administrator for scheduling a stocktake"</i> .
Scheduled	Unlocked green keylock icon 		Clicking  on the stocktake button (with green unlocked icon) will load the stocktake window.

## Activating Stocktake for a Folder/Location

Users with the following privileges will be able to perform specific actions or tasks as summarized below.

- Stocktaker – with this privilege, a user will be able to conduct stocktake for assigned a particular folder/location
- Approve Quarantine containers – with this privilege; users can remove 'quarantine status' or transfer quarantine containers to other locations
- Manage reconciliation - user will be able to update the inventory for all child folders from the parent folder when user has been granted 'Read Write' access to the selected folder.
- The system administrator can also assign the privilege "Access to status action barcodes in Sisot mode"; which will enable the user to assign containers status during stocktake.

CAT NUMBER	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	EXPECTED QUANTITY	ACTUAL QUANTITY	INACTIVE
Not defined	Chloric acid	Sigma-Aldrich (Merck)	2 L	Poison 2 S... Chem Sec... Ucar Extre... Red Tag D...	1	0	1
Not defined	ACETONE	Concept Paints	2 L	CLP Hazard... Red Tag D... CoG...	5	0	5
Unspecified	Unregistered Product 1	Unregistered Vendor 1	5 kg		5	0	5
Unspecified	Self Registered Container		1 L		8	0	8
Unspecified	Laboratory Interim Flask	LabChem	1 kg		2	0	2
Not defined	ACETONE	Concept Paints	2 L	CLP Hazard... Red Tag D... CoG...	1	0	1

Stocktakers can click the Stocktake mode to activate stocktake when the Stocktake key lock icon is green (i.e., Stocktake is scheduled for that folder). The system will take a snapshot of the current inventory to generate a stocktake list of that active folder. If a stocktake was set up for a parent folder that contains sub-folders, the stocktake will not list items which are stored in the sub-folders. In this case, the stocktaker will be required to perform stocktake for every folder.

The scan mode will be deactivated by default when stocktake is active. At the top of the stocktake list window, the stocktaker will view the details of the stocktake plan; stocktake number, stocktake plan period. In the beginning of the stocktake, all containers will be marked as **Missing**.

After users scan the container barcodes, the 'missing' status for the scanned barcodes will be removed and the actual quantity for the product will be increased by 1 for each scanned container.

STOCKTAKE NO.: 12 FROM: 13/07/2021 TO: 14/07/2021 LAST EDITED ON: 13/07/2021 STOCKTAKER: ADMINISTRATOR						SCAN MODE: ON STATUS: NORMAL REASON:	
CAT NUMBER	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	EXPECTED QUANTITY	ACTUAL QUANTITY	INACTIVE
12095	Benzene BENZENE, 99.9+%, HPLC GRADE	Sigma-Aldrich (as MilliporeSigma, Merck)	2 L	Restricted... CLP Hazar... Red Tag O... NZ Regs... Carcinogens... H220 Extr... CoC... Netherland...	14	1	13
AS-0192-6360-2	acetone	3M	10 L	CLP Hazar... Red Tag O... CoC...	2	0	2

If stocktakers scan a product which shall be stored in a different location (misplaced containers), the system will add a new line with expected 'quantity=0' into the stocktake list if the product is not available in the stocktake folder.

The information icon will also display the scanned container barcode details.

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	EXPECTED QUANTITY	ACTUAL QUANTITY	INACTIVE
Benzene BENZENE, 99.9+%, HPLC GRADE	Sigma-Aldrich (as MilliporeSigma, Merck)	2 L	Restricted... CLP Hazar... Red Tag O... NZ Regs... Carcinogens... H220 Extr... CoC... Netherland...			13

Barcode: 0000972296  
 Expiry Date: 08/02/2024  
 Owner: None

If users scan a container barcode that was never registered in the system, the barcode will be saved as an 'invalid barcode'. The invalid barcode button will open the list of invalid barcodes and a message "No item found" will display on top of the screen when unregistered container barcodes.

The table below provides the terminology descriptions used in stocktake for assigning the respective container statuses.

SURPLUS	QTY	REASON	BARCODE
	0	Shared Assets	
WASTE	DISPOSAL METHOD	QTY	REASON
	Contractors	0	Generated Waste
EMPTIED	DISPOSAL METHOD	QTY	REASON
	Returned	0	Re-used
MISSING	QTY	BARCODE	
	13	Multiple	
LOCATED	QTY	BARCODE	



Term	Description
------	-------------

Missing	Containers which are <i>'not scanned during the stocktake'</i>
---------	--

Waste	Container state whereby the <i>'container has been transferred to waste location'</i> (waste services center – which is the red folder) after a stocktake is completed.
-------	---

Emptied	Disposal method options; <i>Returned, Recycled, Trash, Contractors.</i>
---------	---

Reasons for emptied containers can be assigned as; *Re-used, Unwanted, Others.*

Waste	Containers deemed to be waste. Disposal method can be assigned from the options, <i>Contractors, Treatments or Trash.</i>
-------	---

The reasons available for disposals are; *Generated Waste, Contaminated, Damage, catastrophe, Unwanted or Others.*

Surplus	Containers considered to being <i>'excess assets'</i> that are no longer required and can be marked as such. The following surplus statuses can be assigned as reasons; <i>Shared Assets, Unwanted or Others.</i>
---------	---

Term	Description
Quarantine	These are ' <i>misplaced items</i> ' in stocktake when users scan barcodes which do not belong to that specific folder.

Missing and located status comes from the stocktake results. Users can only mark or assign containers with various statuses including surplus, waste, emptied by using the action barcodes and provide the reasons for assigning inactive different statuses to those containers. Below are descriptions of the types of inactive statuses.

### Waste Category

Chemical Waste; scan containers with this status by using preferred disposal methods and reasons action barcodes.

Disposal Method	Description
Contractors	Chemical waste which is required to be sent to waste contractors.
Treatments	Chemical waste which is required to be treated first.
Trash	Chemical Waste which is not a hazardous material and can be trashed into the bin directly.

### Reasons for Waste

Reasons	Description
General waste	Chemical waste generated during the experiment.
Contaminated	Chemical waste generated from the chemical contamination.
Damage	Chemical waste which is collected from damaged containers.
Catastrophe	Chemical waste which is generated from unpredictable catastrophe.
Unwanted	Chemical which is not wanted anymore and will be disposed as a waste.
Others	Chemical which is classified as waste with different reasons other than reasons provided above.

### Emptied Category

Empty chemical containers; scan containers with this status by using preferred disposal methods and reasons action barcodes.

## Disposal Methods:

Disposal Method	Description
Returned	Empty chemical containers which are required to be returned to suppliers or vendors.
Recycled	Empty chemical containers which will re-used at the organisations.
Trash	Empty chemical containers which are not hazardous and can be trashed into the bin directly.
Contractors	Empty chemical containers which will be collected by waste contractors.

## Reasons for Emptied:

Reasons	Description
Re-used	Chemical containers are expected to be re-used.
Unwanted	Empty containers which are not required anymore.
Others	Chemical empty container which is classified with an Emptied status because of different reasons other than reasons provided above.

## Surplus Category

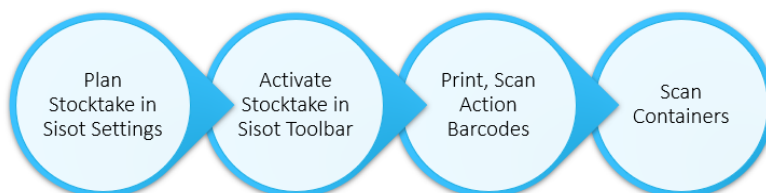
Containers that owners are willing to share or give to others. Scan the reasons action barcodes in order to mark containers with surplus status.

## Reasons for Surplus:

Reasons	Description
Shared assets	Containers that owners are willing to share with others.
Unwanted	Containers that owners are willing to give to others.
Others	Containers that owners mark with surplus status other than reasons stated above.

## 5.1 Conducting a Stocktake

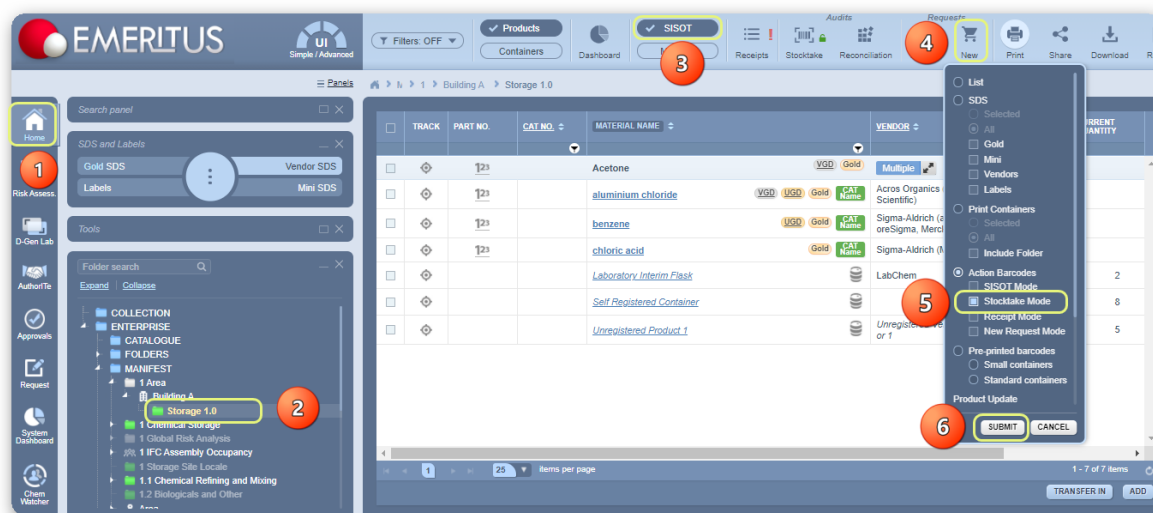
Stocktakers can perform a stocktake when a stocktake plan is scheduled for the respective folder and the stocktake mode will be unlocked when the time starts (green key lock icon will be displayed on stocktake button instead of a red icon). Below are the main steps to follow when ready to undertake a stocktake.



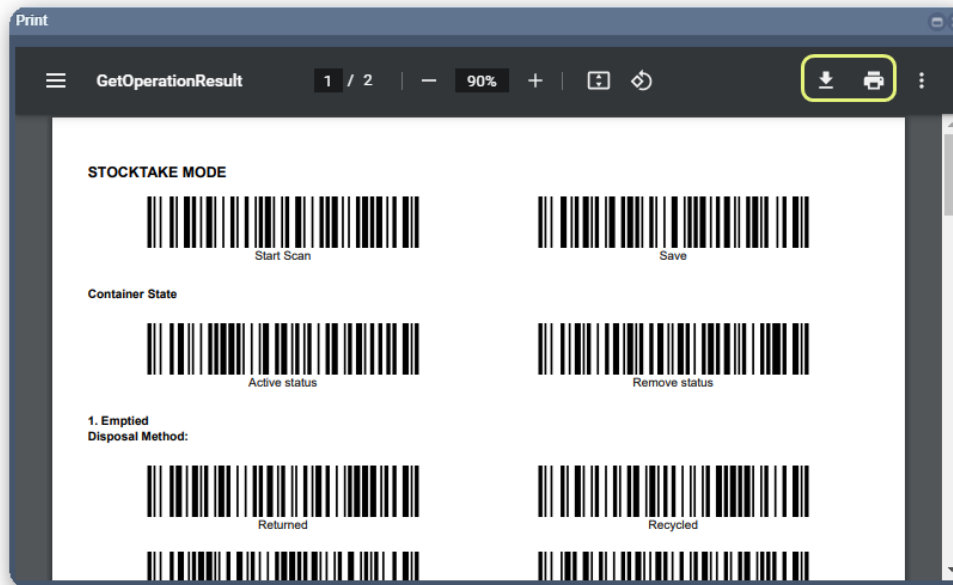
The following steps provide guidance on how to print the Sisot Stocktake Mode barcodes before scanning out containers for the stocktake process.

### Steps: Printing Sisot Action Barcodes for Stocktake Mode

1. Select the **Home** module button.
2. Press a **Folder name** under the Manifest directory.
3. Click on the **Sisot** button from Sisot toolbar.
4. Press **Print** button.
5. Click on the **Stocktake Mode** Checkbox.
6. Press the **Submit** button to print the mode barcodes.



7. Click the **Print** icon from the document viewer within the print window.
8. Click the **Close** button from the print window.



The image below shows the full action barcodes for Sisot Stocktake mode. Stocktakers can assign containers with different statuses during stocktake if the privilege to access to status action barcodes was granted by the administrator.



**2. Waste Disposal Method:**

 Contractors	 Treatments
 Trash	

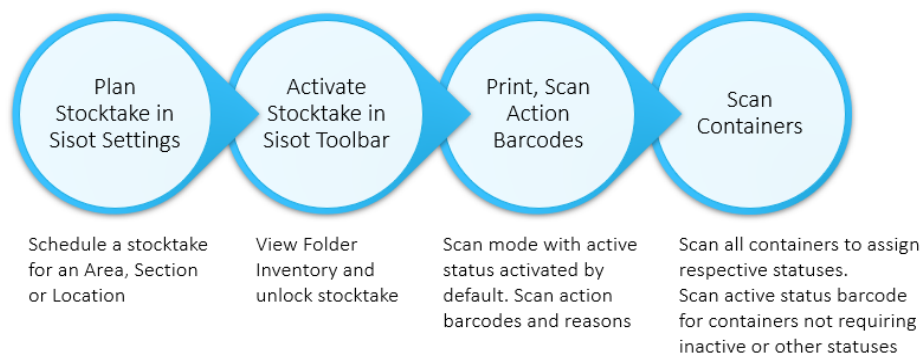
**Reason:**

 Generated Waste	 Contaminated
 Damage	 Calastrophe
 Unwanted	 Others

**3. Surplus Reason:**







 Shared Assets	 Unwanted
 Others	

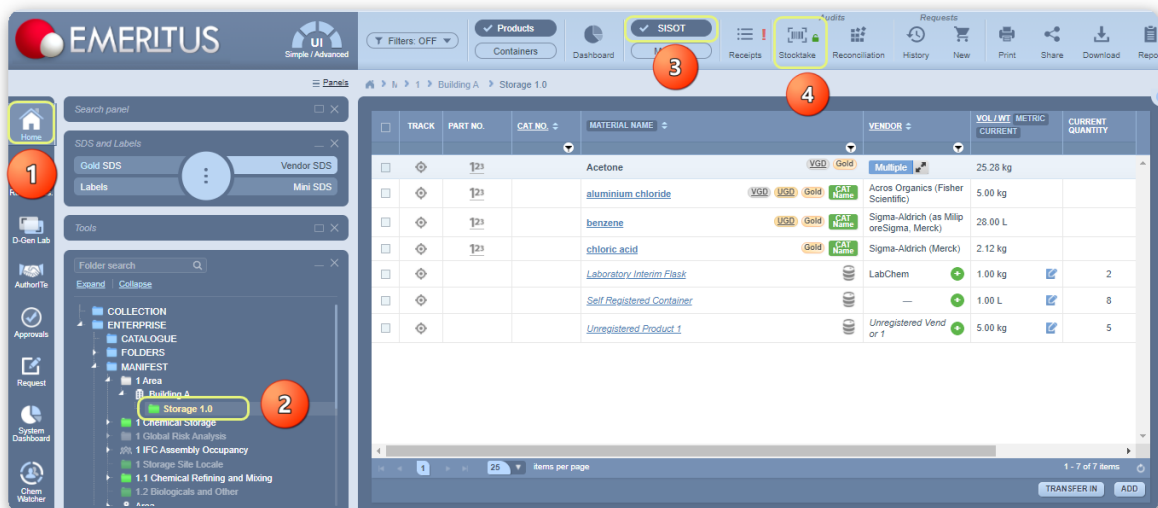
Scan mode with active status will be activated by default when stocktakers activate the stocktake mode. To change to other types of statuses, users must scan the action barcode and then follow the scan sequence:



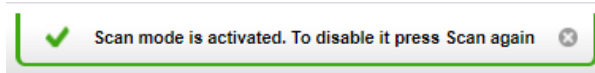
The following steps provide guidance on how to conduct a scheduled stocktake.

### Steps: Conducting a scheduled stocktake for a folder inventory

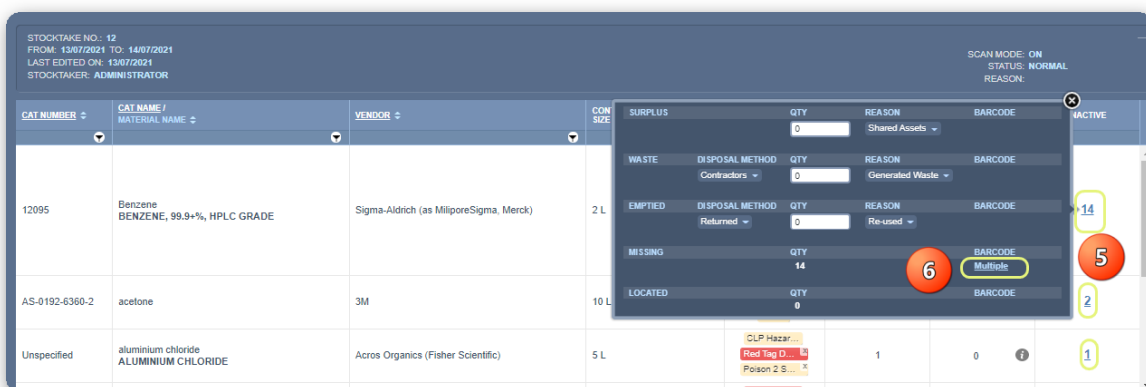
1. Select  the **Home** module button .
2. Select  a **stocktake folder** under the Manifest directory.
3. Click  on the **Sisot** button from Sisot toolbar.
4. Press  **Stocktake** with green key lock icon  from the Sisot toolbar.



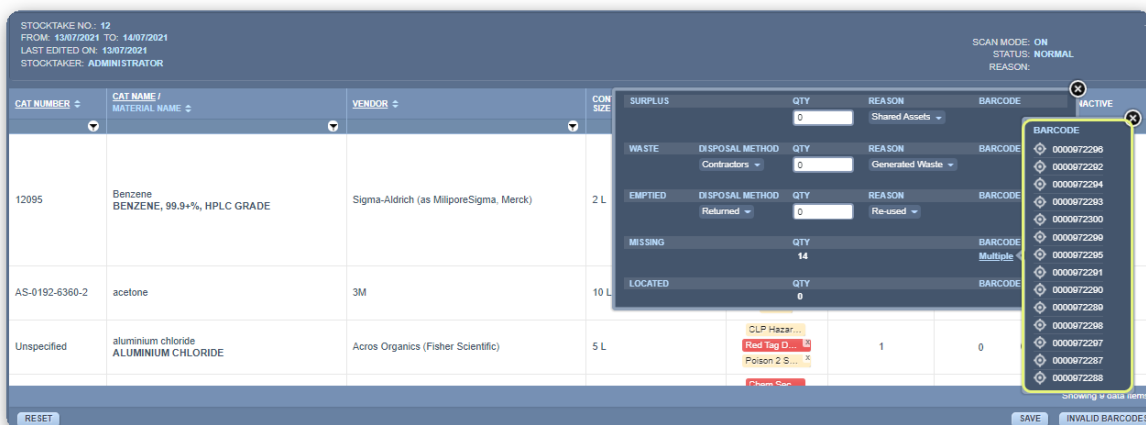
The message, scan mode is activated... gets displayed.



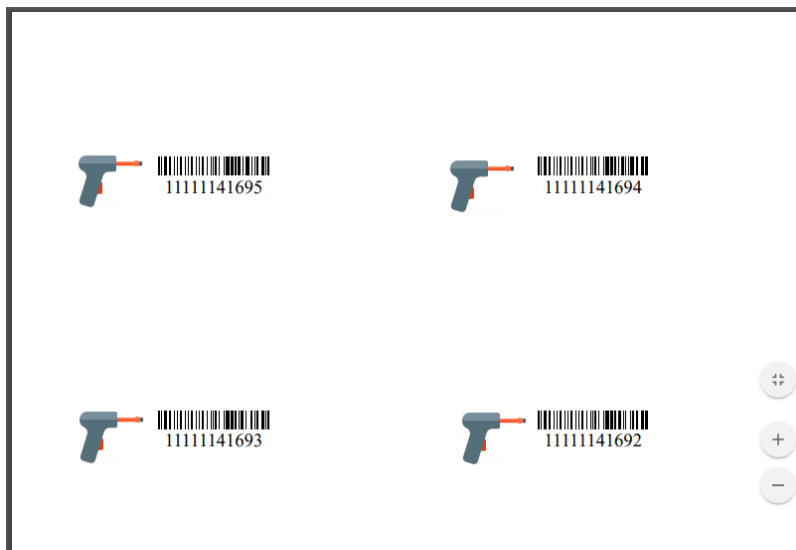
- In the Inactive column, click on the **Number** alongside the cat name to view container barcode(s).



- Click **Multiple** barcode link if there's more than one barcode.



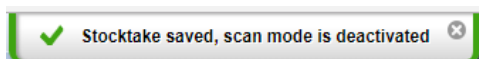
- Scan the "Actual Quantity Barcodes" in stock.



Notice the Actual Quantity text field inserts a value. A single scan of the barcode item will register the value =1 for that container on site storage location and automatically reduce the Inactive value by 1 as well. In this case, 1 container barcode is scanned out of 14 Inactive.

CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	EXPECTED QUANTITY	ACTUAL QUANTITY	INACTIVE
Benzene BENZENE, 99.9+%, HPLC GRADE	Sigma-Aldrich (as MilliporeSigma, Merck)	2 L	<div>Restricted...</div> <div>CLP Hazar...</div> <div>Red Tag D...</div> <div>NE Regs</div> <div>Carcinogens</div> <div>H220 Extr...</div> <div>CoC</div> <div>Netherland...</div>	14	1	13

- Click the **Save** button on the bottom right corner of the user interface  
A message confirmation is displayed.




- Click on **Status** from the inventory table alongside the product which stocktake has been undertaken.

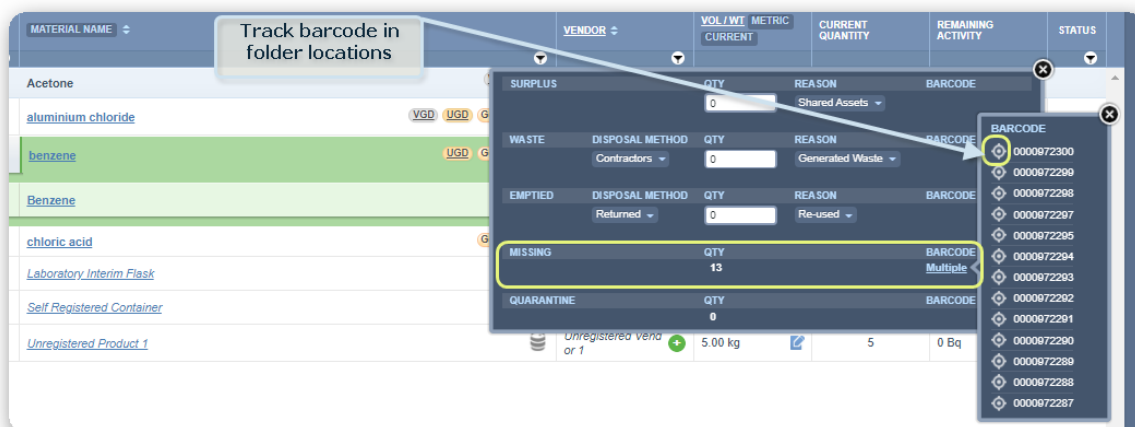
MATERIAL NAME	VENDOR	VOL / WT CURRENT	METRIC CURRENT	CURRENT QUANTITY	REMAINING ACTIVITY	STATUS
Acetone						
aluminium chloride						
benzene						
Benzene						
chloric acid						
Laboratory Interim Flask						
Self Registered Container						
Unregistered Product 1						

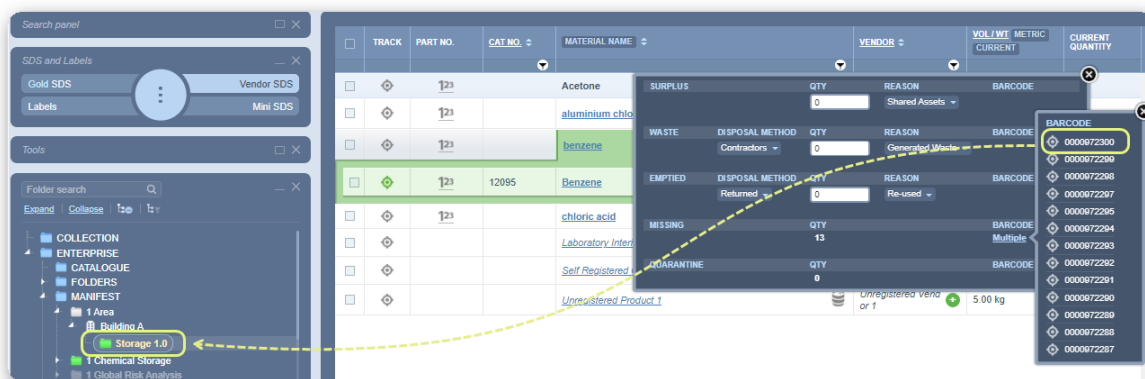
SURPLUS	QTY	REASON	BARCODE
	0	Shared Assets	
WASTE	QTY	REASON	BARCODE
Contractors	0	Generated Waste	
EMPTIED	QTY	REASON	BARCODE
Returned	0	Re-used	
MISSING	QTY	REASON	BARCODE
	13	Multiple	
QUARANTINE	QTY	REASON	BARCODE
	0		



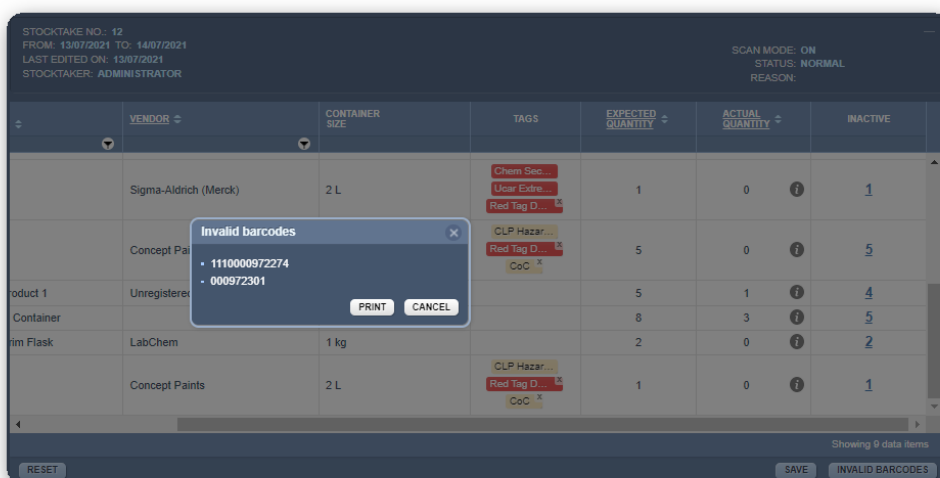
The **Status** will show the actual status for any missing items, which can be tracked through the target icon  for each barcode line item to identify the missing container in any of the folder locations.



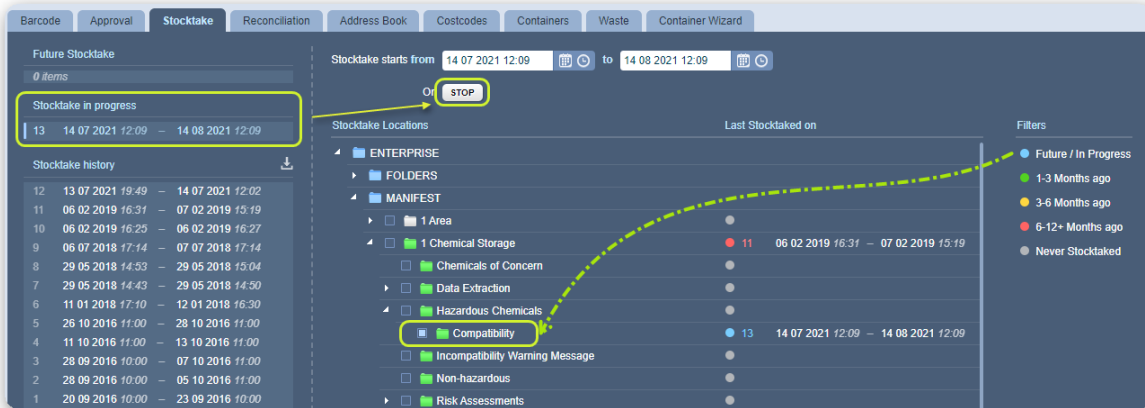
The location folder is identified by the respective highlighted folder within the tree structure.



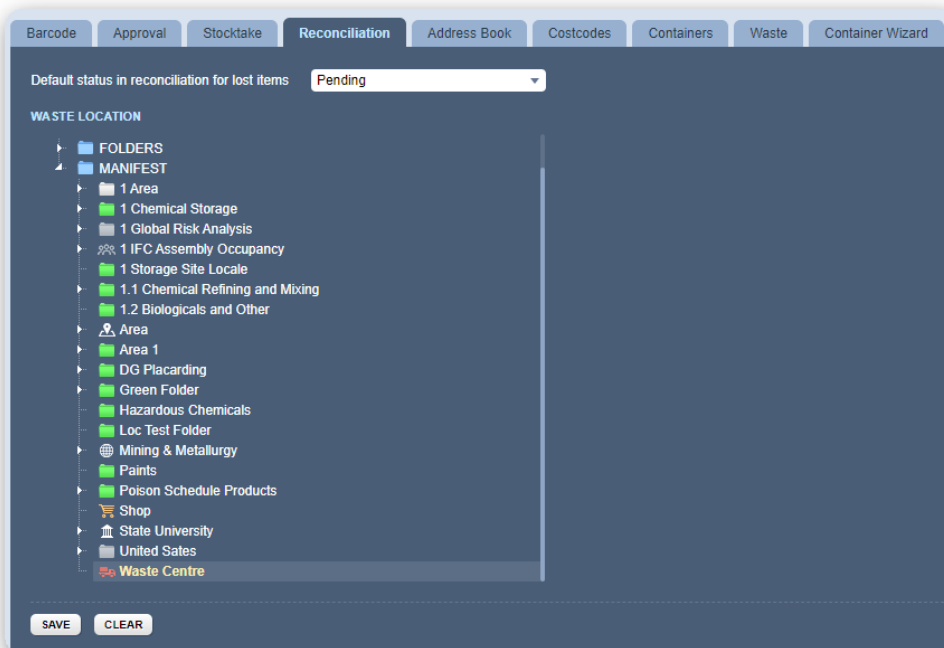
Scan the disposal method and reason barcodes to assign container statuses and reasons. Select the Inactive value alongside that product's container material name and verify the quantity and reason for the container status and continue the process until all container barcodes are exhausted by simply activating the respective status of the containers. If there are invalid barcodes, those can be printed and cross-checked for validity in that folder/location.



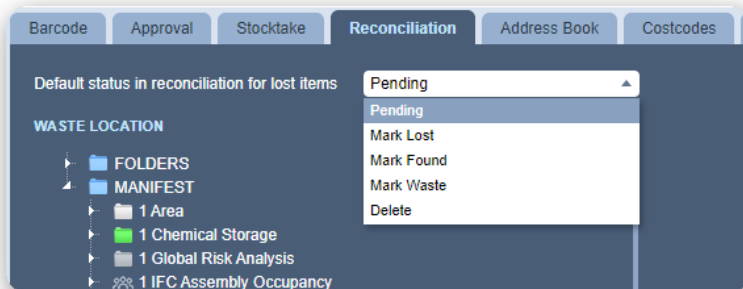
Remember to **Stop the stocktake in Progress** prior to reconciliation by going to stocktake settings.



Note that the Reconciliation setting for this domain is set to default the status for lost items to “Pending” for waste collection.



When reconciling items, the options available are Pending, Mark Lost, Mark Found, Mark Waste and Delete. Any of these can be set as the default status in reconciliation.

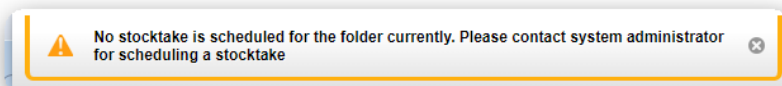


For example, during stocktake, some container barcodes have been assigned to.

- waste category; disposal method and reasons
- Emptied category as trash and reasons being others
- Missing category

TRACK	PART NO.	CAT. NO.	MATERIAL NAME	VENDOR	VOL. / WT	METRIC	CURRENT QUANTITY	REASON	REMAINING ACTIVITY	STATUS
<input type="checkbox"/>	123		Acetone				0	Shared Assets		
<input type="checkbox"/>	123		aluminium chloride				1	Others	0000972297	
<input type="checkbox"/>	123		benzene				1	Damage	0000972295	
<input type="checkbox"/>	123	12095	Benzene				0	Generated Waste		
<input type="checkbox"/>	123		chloric acid				3	Others	0000972300	
<input type="checkbox"/>	123		chloric acid				0	Re-used	0000972299	
<input type="checkbox"/>	123	Not defined	Chloric acid				8	Multiple	0000972298	
<input type="checkbox"/>			Laboratory Interim Flask				0			Status
<input type="checkbox"/>			Self Registered Container				0			Status
<input type="checkbox"/>			Unregistered Product 1				0			Status

Once stocktake has been stopped, the message will display when the stocktake button is reselected for the specific folder where stocktake has been completed and closed.

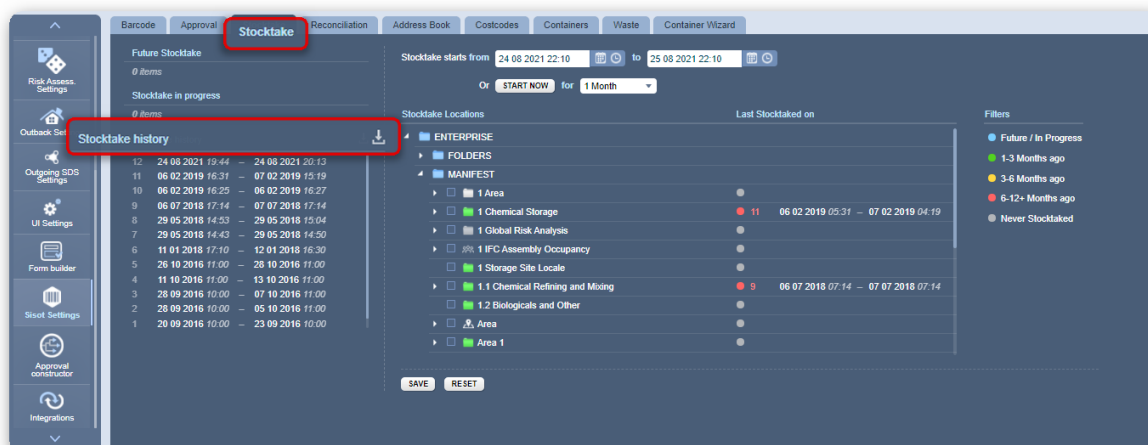


### 5.1.1 Download Stocktake History Report

#### Stocktake Settings

Stocktake settings are available in Sisot Settings where the administrator can set users to be stocktakers for the folder locations and product containers they own.

- i** Stocktake Settings contain an option to download Stocktake History Report. Note that users need to be assigned the respective privileges to be able to access the Sisot Stocktake settings. Not all users will have access to the systems settings unless enabled by the domain administrator.



## Sisot Settings

### Stocktake Tab

### Description

Set up Future Stocktake



- Set up stocktake now or in the future for selected folders for specific date & time.
- Filter stocktake by future/In progress, 1-3 months ago, 3-6 months ago, 6-12+ months ago or even never stocktaked.
- View stocktake history & also download stocktake history summary report

Stocktake History





- Download Stocktake History Report

The steps below illustrate how to download a Stocktake History Report from the Sisot Settings.

### Steps: Download Stocktake History Report from Sisot Settings

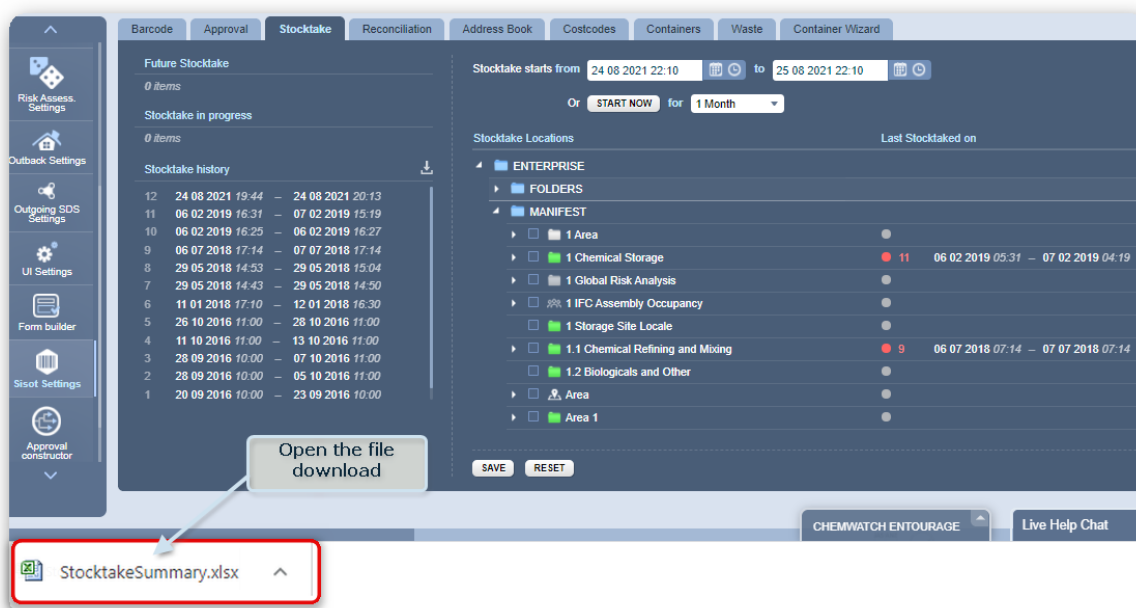
1. Click  the **Settings** link  on the top left area of the user interface.



2. Click  the **Sisot Settings** button .
3. Click  the **Stocktake** tab.
4. Select  the **Download** button.



5. Select download **Destination Folder** on your desktop or laptop.
6. Click the **Save** button. Notice the file name given by default “Stocktake Summary” excel format to be downloaded.
7. **Open the downloaded file “Stocktake Summary” excel file to view the respective datapoints (column headers).**



1	Location	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
2	Start Date	End Date	Stocktake	Stocktaker	Stocktake perform	Last activity	Barcode	Container	CA	Contain	Vendor	Container #	Container Size	Stocktake St	Reconciliation	S	Destination Folder
3	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
4	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
5	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097227 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
6	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097227 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
7	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097227 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
8	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
9	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
10	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
11	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097230 ACETONE	31619	Sigma-Aldrich (Merck)	25	I	Lost					
12	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
13	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
14	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
15	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
16	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
17	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
18	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					
19	24/08/2021	24/08/2021	24/08/2021	Administrator	Yes	24/08/2021	000097228 Benzene	31619	Sigma-Aldrich (Merck)	25	I	Lost					

Stocktake Report datapoints

Location	Start Date	End Date	Stocktake No.	Stocktaker	Stocktake performed?	Last activity date
Container CAT/CON Name	Container Catalogue Number	Vendor	Container Size	Container Size Unit	Stocktake Status	Reconciliation Status
Destination Folder						

## 5.2 Reconciling Items



The Reconciliation mode will display the respective container information and the stocktake result as missing. Note that the Action column will default to “Pending” status as per the reconciliation default status set for this domain account as shown in previous section.

BARCODE	CAT NUMBER	CAT NAME	TAGS	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COMMENT	STOCKTAKE RESULT	ACTION
0000972325	AS-0192-4360-2	acetone	CLP Hazard Red Tag D CoC	3M	10.0 L	06/07/2021	None	Administrator		Missing	Pending
0000972326	AS-0192-4360-2	acetone	CLP Hazard Red Tag D CoC	3M	10.0 L	06/07/2021	None	Administrator		Missing	Pending
0000972187		aluminium chloride	CLP Hazard Red Tag D Poison 2 S	Acros Organics (Fisher Scientific)	5.0 L	08/07/2021	None	Administrator		Missing	Pending
0000972268	Not defined	Chloric acid	Chem Sec Local Edit	Sigma-Aldrich (Merck)	2.0 L	26/03/2020	25/03/2022	None		Missing	Pending
0000972274	Not defined	ACETONE	CLP Hazard Red Tag D CoC	Concept Paints	2.0 L	09/04/2021	None	Administrator		Missing	Pending
0000972312	Not defined	ACETONE	CLP Hazard Red Tag D CoC	Concept Paints	2.0 L	01/07/2021	None	None		Missing	Pending
0000972313	Not defined	ACETONE	CLP Hazard Red Tag D CoC	Concept Paints	2.0 L	01/07/2021	None	None		Missing	Pending
0000972314	Not defined	ACETONE	CLP Hazard Red Tag D CoC	Concept Paints	2.0 L	01/07/2021	None	None		Missing	Pending

Assign the respective Action Status to specific container barcodes where relevant. The action options available from the drop-down arrow are described below.

BARCODE	CAT NUMBER	CAT NAME	TAGS	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COMMENT	STOCKTAKE RESULT	ACTION
0000972325	AS-0192-4360-2	acetone	CLP Hazard Red Tag D CoC	3M	10.0 L	06/07/2021	None	Administrator		Missing	Pending
0000972326	AS-0192-4360-2	acetone	CLP Hazard Red Tag D CoC	3M	10.0 L	06/07/2021	None	Administrator		Missing	Pending
0000972187		aluminium chloride	CLP Hazard Red Tag D Poison 2 S	Acros Organics (Fisher Scientific)	5.0 L	08/07/2021	None	Administrator		Missing	Pending
0000972268	Not defined	Chloric acid	Chem Sec Local Edit	Sigma-Aldrich (Merck)	2.0 L	26/03/2020	25/03/2022	None		Missing	Pending

### Action Description

Pending	No action will be performed on the container.
Mark Found	Container will be marked as found (normal).
Mark Lost	Container will be marked as lost.
Mark Waste	Container will be marked as waste and (optional) moved to the selected location.

## Action Description

Delete The container will be deleted.

STOCKTAKE NO. 12  
FROM: 13/07/2021 TO: 14/07/2021  
LAST EDITED ON: 14/07/2021  
STOCKTAKER: ADMINISTRATOR

BARCODE	CAT NUMBER	CAT NAME	TAGS	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COMMENT	STOCKTAKE RESULT	ACTION
0000972325	AS-0192-6360-2	acetone	CLP Hazard Red Tag D CoC	3M	10.0 L	06/07/2021	None	Administrator		Missing	Mark Lost
0000972326	AS-0192-6360-2	acetone	CLP Hazard Red Tag D CoC	3M	10.0 L	06/07/2021	None	Administrator		Missing	Mark Found
0000972187		aluminium chloride	CLP Hazard Red Tag D CoC	Acros Organics (Fisher Scientific)	5.0 L	08/07/2021	None	Administrator		Missing	Mark Waste
0000972258	Not defined	Chloric acid	Chem Sec User Edit Red Tag D	Sigma-Aldrich (Merck)	2.0 L	26/03/2020	25/03/2022	None		Missing	Storage 1.0 Track Location
0000972274	Not defined	ACETONE	CLP Hazard Red Tag D	Concept Paints	2.0 L	09/04/2021	None	Administrator		Missing	Delete

Upon completing the respective actions, press the “Update Inventory” button **UPDATE INVENTORY**.

0000972289	12095	Benzene	Restricted CLP Hazard Red Tag D H2 Regs Cardboard H20 Etc CoC Netherlands Restricted CLP Hazard	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Found
------------	-------	---------	--	--	-------	------------	------------	------	--	---------	------------

**UPDATE INVENTORY** RECONCILIATION HISTORY INVALID BARCODES

The update inventory message confirms successful operation.



STOCKTAKE NO. 12  
FROM: 13/07/2021 TO: 14/07/2021  
LAST EDITED ON: 14/07/2021  
STOCKTAKER: ADMINISTRATOR

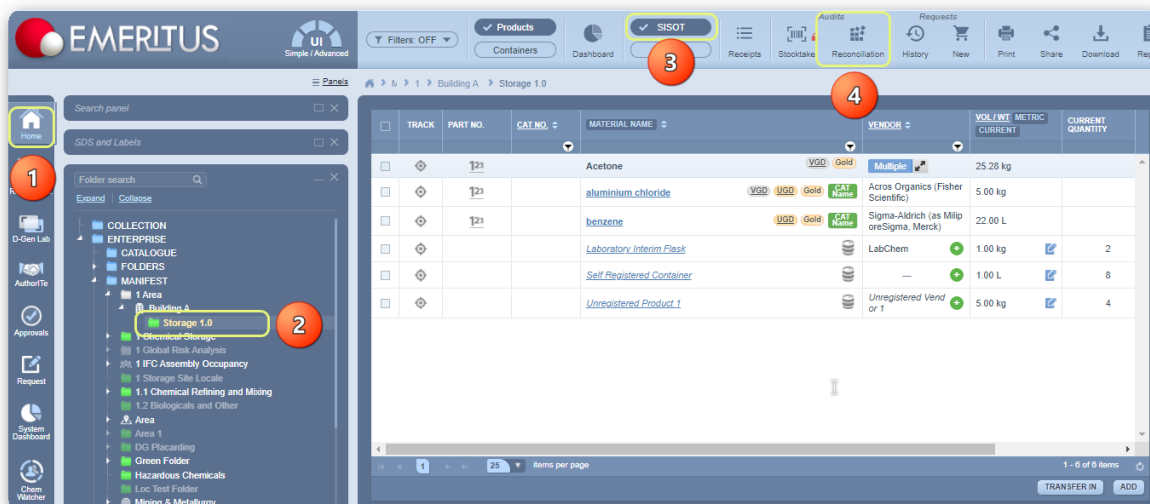
BARCODE	CAT NUMBER	CAT NAME	TAGS	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COMMENT	STOCKTAKE RESULT	ACTION
0000972287	12095	Benzene	Restricted CLP Hazard Red Tag D H2 Regs Cardboard H20 Etc CoC Netherlands	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Found
0000972288	12095	Benzene	Restricted CLP Hazard Red Tag D H2 Regs Cardboard H20 Etc CoC Netherlands	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Lost
0000972289	12095	Benzene	Restricted CLP Hazard Red Tag D H2 Regs Cardboard H20 Etc CoC Netherlands	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Found

**UPDATE INVENTORY** RECONCILIATION HISTORY INVALID BARCODES

### Steps: Conduct Reconciliation for an item in a stocktake folder

1. Select the **Home** module button
2. Select a **Stocktake Folder** under the Manifest directory.
3. Click on the **Sisot** button from Sisot toolbar.
4. Press the **Reconciliation** button from the Sisot toolbar.





Reconciliation mode will display the Reconciliation Stocktake details in the header of the window with **Stocktake No.**, **From** and **To** dates, **Last edited date**, **Stocktaker**.

<b>STOCKTAKE NO.: 12</b> <b>FROM: 13/07/2021 TO: 14/07/2021</b> <b>LAST EDITED ON: 14/07/2021</b> <b>STOCKTAKER: ADMINISTRATOR</b>									
	BARCODE	CAT NUMBER	CAT NAME	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COM
<input type="checkbox"/>	0000972287	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None	
<input type="checkbox"/>	0000972288	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None	
<input type="checkbox"/>	0000972289	12095	Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None	

5. Scroll towards the right using horizontal scrollbar to view the **stocktake result and action columns** or simply use the window expand icon located at the top right corner.
6. Assign the **Action** from the drop-down arrow options as Mark Found, Mark Lost, Mark Waste or Delete. Note that **Pending** is set as the default reconciliation container status.

STOCKTAKE NO.: 12

FROM: 13/07/2021 TO: 14/07/2021

LAST EDITED ON: 14/07/2021

STOCKTAKER: ADMINISTRATOR

	BARCODE	CAT NUMBER	CAT NAME	TAGS	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COMMENT	STOCKTAKE	ACTION
<input type="checkbox"/>	0000972325	AS-0192-4360-2	acetone	CLP HAZAR Red Tag D GOC	3M	10.0 L	06/07/2021	None	Administrator		Missing	<div>Pending</div> <div> <div>Pending</div> <div>Mark Found</div> <div>Mark Lost</div> <div>Mark Waste</div> <div>Delete</div> </div>
<input type="checkbox"/>	0000972326	AS-0192-4360-2	acetone	CLP HAZAR Red Tag D GOC	3M	10.0 L	06/07/2021	None	Administrator		Missing	<div>Pending</div> <div> <div>Pending</div> <div>Mark Found</div> <div>Mark Lost</div> <div>Mark Waste</div> <div>Delete</div> </div>
<input type="checkbox"/>	0000972187		aluminium chloride	CLP HAZAR Red Tag D Parker 2.5	Acros Organics (Fisher Scientific)	5.0 L	06/07/2021	None	Administrator		Missing	<div>Pending</div> <div> <div>Pending</div> <div>Mark Found</div> <div>Mark Lost</div> <div>Mark Waste</div> <div>Delete</div> </div>
<input type="checkbox"/>	0000972268	Not defined	Chloric acid	Chem Sec Clear E-Box	Sigma-Aldrich (Merck)	2.0 L	26/03/2020	25/03/2022	None		Missing	<div>Pending</div> <div> <div>Pending</div> <div>Mark Found</div> <div>Mark Lost</div> <div>Mark Waste</div> <div>Delete</div> </div>

7. Press the **Update Inventory** button.

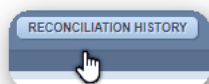
STOCKTAKE NO.: 12  
FROM: 13/07/2021 TO: 14/07/2021  
LAST EDITED ON: 14/07/2021  
STOCKTAKER: ADMINISTRATOR

<input type="checkbox"/>	BARCODE	CAT NUMBER	CAT NAME	VENDOR	CONTAINER SIZE	DATE ACQUIRED	EXPIRY DATE	OWNER	COMMENT	STOCKTAKE RESULT	ACTION
<input type="checkbox"/>	0000972287	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Found
<input type="checkbox"/>	0000972288	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Lost
<input type="checkbox"/>	0000972289	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Found
<input type="checkbox"/>	0000972290	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Waste
<input type="checkbox"/>	0000972291	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	Administrator		Missing	Mark Found
<input type="checkbox"/>	0000972292	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	Administrator		Missing	Mark Found
<input type="checkbox"/>	0000972293	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Found
<input type="checkbox"/>	0000972294	12095	Benzene	Sigma-Aldrich (as MilporeSigma, Merck)	2.0 L	01/07/2021	08/02/2024	None		Missing	Mark Found
<input type="checkbox"/>	0000972325	AS-0192-6360-2	acetone	3M	10.0 L	06/07/2021	None	Administrator		Missing	Mark Lost

RECONCILIATION HISTORY INVALID BARCODES


## Download Reconciliation History

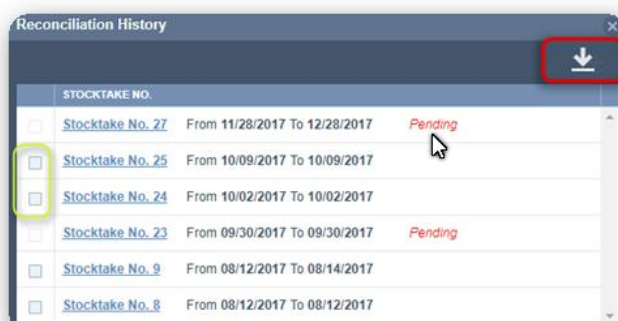
The Reconciliation History can be retrieved from the “Reconciliation History” button located at the bottom right corner of the user interface in Reconciliation mode as shown in the screenshot.



The Reconciliation History window will display the Stocktake Number with the respective stocktake(s) conducted date(s) and the stocktake schedule.



Any pending (in-progress) stocktake status will be shown in red. Click  the checkbox to select a stocktake number to download and save the Reconciliation History Report.



## Reconciliation Report in Excel Format

	A	B	C	D	F	G	H	I	J	K	L	M	N	O	P	Q
1	Stocktake	N12														
2	Location	/ENTERPRISE/MANIFEST/1 Area/Building A/Storage 1.0														
3	From	13/07/2021 7:49 PM	To	12:02 PM												
4	Last edited	14/07/2021														
5	Stocktaker	Administrator														
6	Cat No.	Name	Vendor Name	Size	Discrepancy	Not Reconciled	Expected Quantity	Actual Quantity	Barcode	Date Acquired	Expiry Date	e Result	Folder 1	Action	Folder 2	Comments
7	12095	Benzene	Sigma-Aldrich	2.0 L	-8	8	14	6								
8	12095	Benzene	Sigma-Aldrich	2.0 L					0000972287	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Found		
9	12095	Benzene	Sigma-Aldrich	2.0 L					0000972288	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Lost		
10	12095	Benzene	Sigma-Aldrich	2.0 L					0000972289	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Found		
11	12095	Benzene	Sigma-Aldrich	2.0 L					0000972290	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Waste		
12	12095	Benzene	Sigma-Aldrich	2.0 L					0000972291	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Found		
13	12095	Benzene	Sigma-Aldrich	2.0 L					0000972292	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Found		
14	12095	Benzene	Sigma-Aldrich	2.0 L					0000972293	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Found		
15	12095	Benzene	Sigma-Aldrich	2.0 L					0000972294	01/07/2021	08/02/2024	Missing	/ENTERPRISE/MANIFEST/1	Mark Found		
16	AS-0192-63i	acetone	3M	10.0 L	-2	2	2	0								
17	AS-0192-63i	acetone	3M	10.0 L					0000972325	06/07/2021		Missing	/ENTERPRISE/MANIFEST/1	Mark Lost		
18	AS-0192-63i	acetone	3M	10.0 L					0000972326	06/07/2021		Missing	/ENTERPRISE/MANIFEST/1	Mark Found		
19		aluminium c	Acros Organic	5.0 L	-1	1	1	0								
20		aluminium c	Acros Organic	5.0 L					0000972187	08/07/2021		Missing	/ENTERPRISE/MANIFEST/1	Mark Waste		

What you will learn in this release component are the following related features available in Sisot Reconciliation Mode:

- [How to assign lost containers in reconciliation mode](#)
- [How to assign waste containers in reconciliation mode](#)
- [How to add lost containers into a designated folder](#)
- [How to add waste containers into a designated folder](#)



Chemwatch has enhanced the Reconciliation mode in Sisot module with the ability to set container items as Lost or Waste when in Reconciliation mode. Furthermore, users can decide to designate a specific folder for the lost or waste containers as a separate entity from currently reconciled folder location for ease of tracking or providing reports on those items. The image below shows the various statuses available in Reconciliation mode.

<b>Normal</b>	Container was scanned and marked as Found.
<b>Surplus</b>	Container was scanned and marked as Surplus.
<b>Quarantine</b>	Container was scanned from another folder and marked as Quarantine.
<b>Emptied</b>	Container was scanned and marked as Emptied.
<b>Waste</b>	Container was scanned and marked as Waste.
<b>Lost</b>	Container is currently not scanned and is counted as lost.








## Set Container Status as Lost or Waste in Reconciliation mode

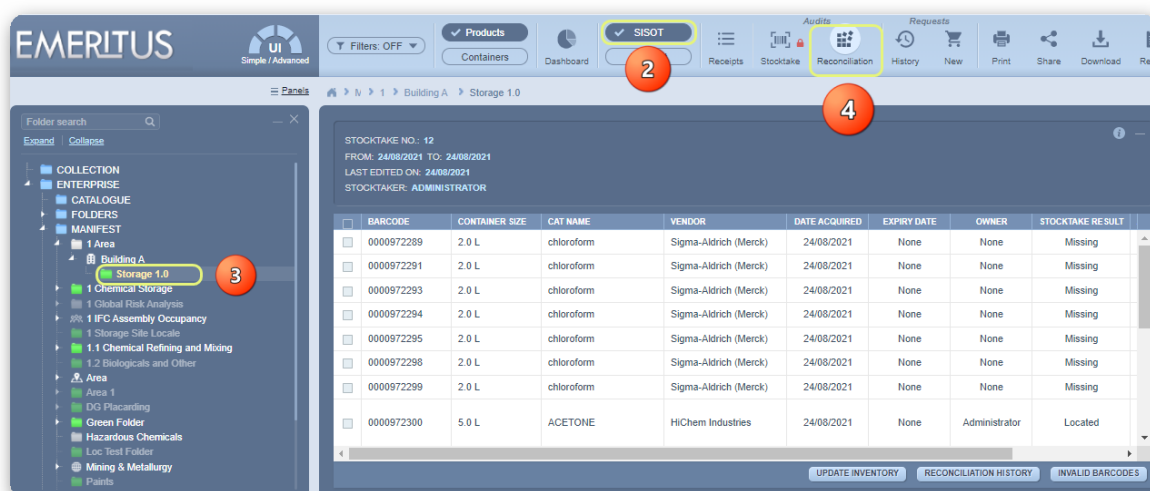
After a stocktake has been performed, the next process would be to reconcile the items for the specific folder/location.

- i** Stocktake and Reconciliation can be set in Sisot Settings. Note that users need to be assigned the respective privileges to be able to schedule a Stocktake & Reconciliation for a particular folder/location. Not all users will have access to the systems settings unless enabled by the domain administrator.

The steps below show how to assign items as lost or waste when in Reconciliation mode.



### Steps: Mark Containers as Lost or Waste in Reconciliation mode


1. Select  the **Home** module button .
2. Click  on the **Sisot** button from Sisot toolbar.
3. Select  a **Stocktake Folder**  under the Manifest directory.
4. Click  the **Reconciliation** button  on the Sisot toolbar.

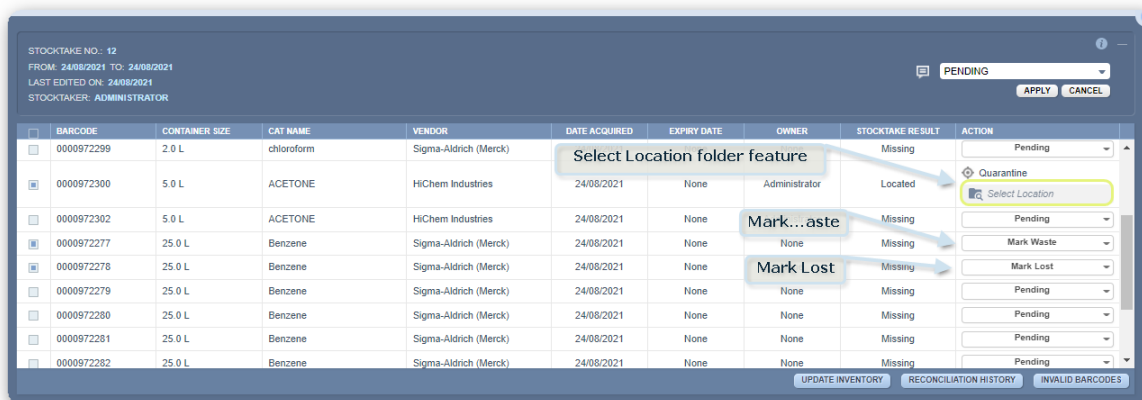



5. Click  the **Expand** icon to view all active columns.

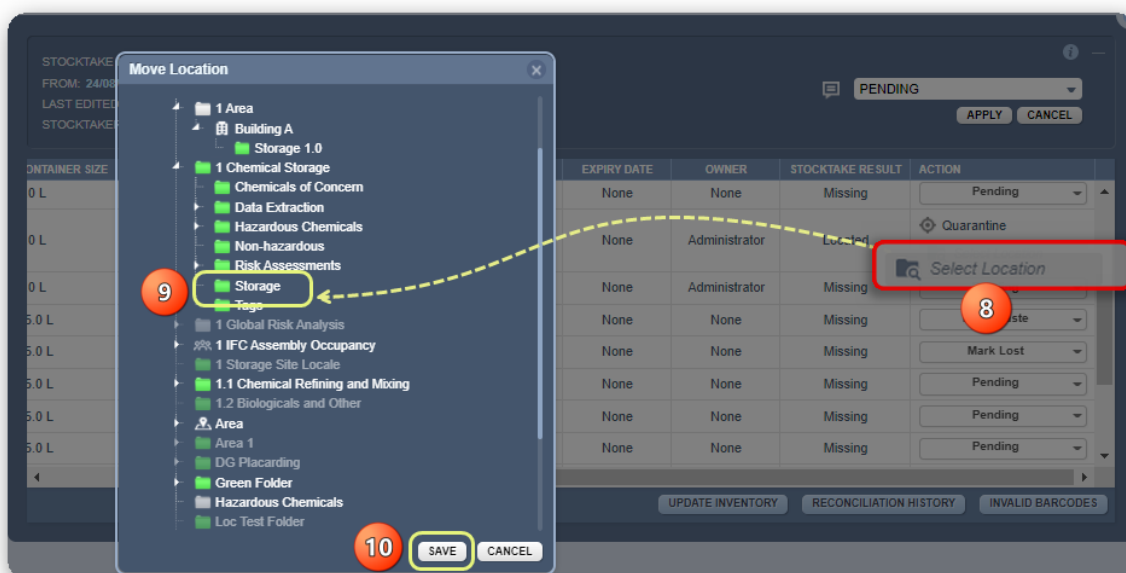


6. Select  the **Barcodes** from the grid's checkboxes alongside the product names.
7. Select  the respective **Container Status** from the drop-down list. For example, mark lost, or Mark Waste is selected in this exercise for two container barcodes.

- Click  on the **Select Location** icon for item with the “Select Location” feature, in this example, the container has status “Quarantine”, which was located during stocktake and intending to place it in another folder.



- Select the **folder location** from the tree structure.
- Press  the **Save** button.




- Folder location is applied and the name of the folder gets displayed in the action column where it can also be tracked.

STOCKTAKE NO.: 12  
FROM: 24/08/2021 TO: 24/08/2021  
LAST EDITED ON: 24/08/2021  
STOCKTAKER: ADMINISTRATOR

PENDING [APPLY] [CANCEL]

CONTAINER SIZE	CAT NAME	VENDOR	DATE ACQUIRED	EXPIRY DATE	OWNER	STOCKTAKE RESULT	ACTION
0 L	chloroform	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
0 L	ACETONE	HiChem Industries	24/08/2021	None	Administrator	Located	Quarantine Storage Track Location
0 L	ACETONE	HiChem Industries	24/08/2021	None	Administrator	Missing	Pending
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Mark Waste
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Mark Lost
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending

[UPDATE INVENTORY] [RECONCILIATION HISTORY] [INVALID BARCODES]

12. Use the **Track** icon  to locate the respective folder location.

Folder search

- COLLECTION
- ENTERPRISE
  - CATALOGUE
  - FOLDERS
  - MANIFEST
    - 1 Area
      - 1 Chemical Storage
        - Chemicals of Concern
        - Data Extration
        - Hazardous Chemicals
        - Non-hazardous
        - Risk Assessments
        - Storage - Quarantine
        - Tags
      - 1 Global Risk Analysis
      - 1 IFC Assembly Occupancy
      - 1 Storage Site Locale
      - 1.1 Chemical Refining and Mixing
      - 1.2 Biologicals and Other
    - Area
    - Area 1
    - NG Placardion

STOCKTAKE NO.: 12  
FROM: 24/08/2021 TO: 24/08/2021  
LAST EDITED ON: 24/08/2021  
STOCKTAKER: ADMINISTRATOR

PENDING [APPLY] [CANCEL]

CONTAINER SIZE	CAT NAME	VENDOR	DATE ACQUIRED	EXPIRY DATE	OWNER	STOCKTAKE RESULT	ACTION
0 L	chloroform	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
0 L	ACETONE	HiChem Industries	24/08/2021	None	Administrator	Located	Quarantine Storage Track Location
0 L	ACETONE	HiChem Industries	24/08/2021	None	Administrator	Missing	Pending
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Mark Waste
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Mark Lost
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
5.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending

[UPDATE INVENTORY] [RECONCILIATION HISTORY] [INVALID BARCODES]

13. Update the inventory and close the Reconciliation mode.

STOCKTAKE NO.: 12  
FROM: 24/08/2021 TO: 24/08/2021  
LAST EDITED ON: 24/08/2021  
STOCKTAKER: ADMINISTRATOR

CONTAINER SIZE	CAT NAME	VENDOR	DATE ACQUIRED	EXPIRY DATE	OWNER	STOCKTAKE RESULT	ACTION
2.0 L	chloroform	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
2.0 L	chloroform	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
2.0 L	chloroform	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
5.0 L	ACETONE	HiChem Industries	24/08/2021	None	None	Missing	Mark Found
5.0 L	ACETONE	HiChem Industries	24/08/2021	None	Administrator	Missing	Pending
25.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Mark Waste
25.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Mark Lost
25.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending
25.0 L	Benzene	Sigma-Aldrich (Merck)	24/08/2021	None	None	Missing	Pending

[UPDATE INVENTORY] [RECONCILIATION HISTORY] [INVALID BARCODES]

## 6.0 The Waste Story

HOME | SISOT | WASTE STORY

This topic will cover the following objectives;

- How to identify and create a waste folder
- How to complete a transfer for a waste container
- How to use the receipt out tab for a waste container in Receipts Mode
- How to identify the status of waste containers and respective barcodes
- How to generate a waste form and complete contact, company waste details
- How to issue waste form and add attachments to a waste transfer receipt
- How to share waste form link to a waste collector and waste form validity



The management of waste across businesses and organisations follows jurisdictional, state and local government laws in each country. The principle of waste management encompasses a chemicals management process to identifying waste as hazardous or non-hazardous. Chemwatch has developed a Scan in Scan out Technology (Sisot) module for managing waste, especially chemical waste through inventory management, folder management, and transfer of containers between folders, stocktake & reconciliation. Note that folders in the system represent sites, areas, sections, and locations where materials are stored.

### “Waste” management in Sisot?

Waste in Sisot refers to moving or transferring containers from storage folder to the designated “Waste” type of folder, also referred to as the Red Folder. The Sisot Waste Story has been developed to allow users to transfer items to the **Waste Centre** (Waste Folder) for disposal. This is where the **Waste Form** is generated, which can be shared with contractors who will be collecting the waste materials from site. Next; let us look at the types of waste folders that can be created in the folder structure through folder properties.



#### Waste Folders

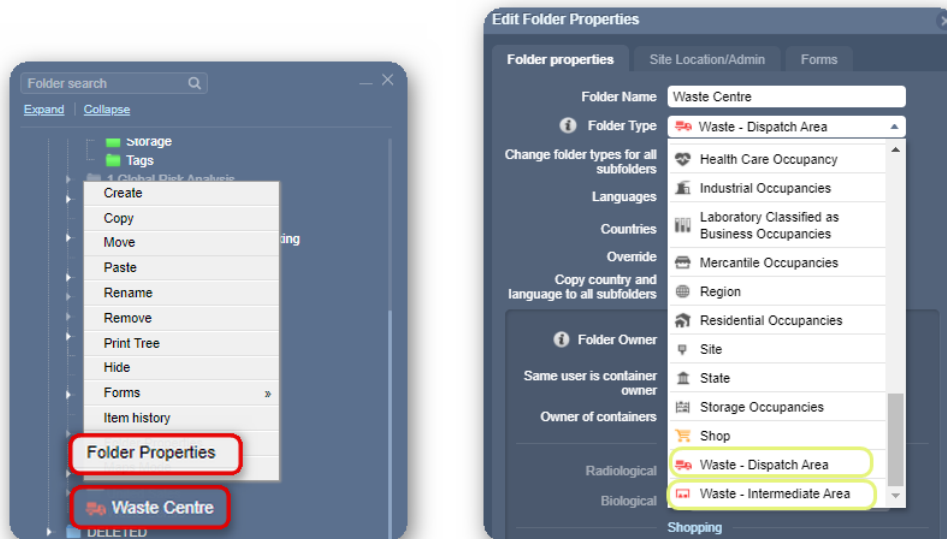
Two types of waste folders can be created; **Waste Area** and **Waste Centre**. Both are identified by red icons in the folder tree. Waste folders can be created under storage folders, shop folders and/or administrator folders. Stocktake can also be done on both types of waste folders. A red waste folder is used as a waste disposal centre where used and expired containers, including chemical waste, can be sent from any storage folder or shop folder for removal from site.

#### Waste Area

This behaves as a storage folder. Waste items can be transferred there and stored temporarily before being transferred to the Waste Centre for pickup by the waste contractor. To do this, users need Read and Write access to transfer items to the Waste Area.

#### Waste Centre

Containers are transferred here to generate a Waste Form and for future collection by waste contractors. Users will need Read access to be able to transfer items to the Waste Centre. The Waste Folder type is designated with a **Waste Dispatch Area** icon  and a **Waste Intermediate Area** icon . This can be achieved through the folder right click context menu option; folder properties. Learn more about folder creation in the Chemeritus user guide.



In the folder properties, the Site Location/Admin tab provides admins to stipulate the location, address, emergency contact, country, site administrator user, role or group and enables admins to copy location address information to all subfolders. The site location address details are essential for identifying the Waste Centre's actual location.



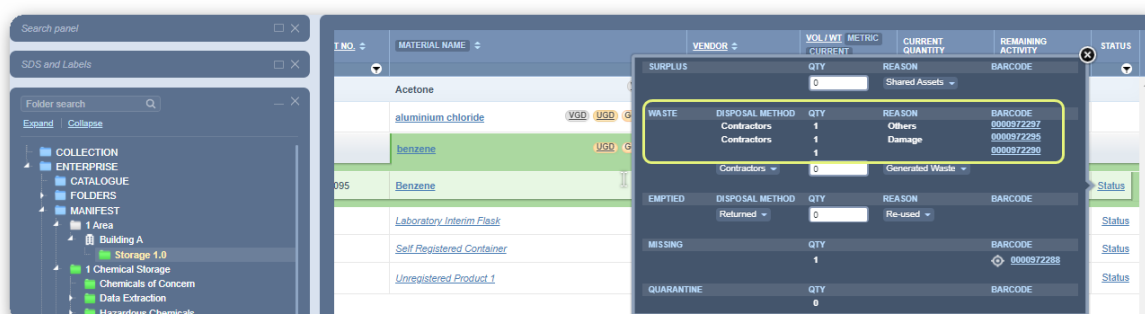


## 6.1 How to Generate Waste Forms for Waste Pick-Up?

Containers can be transferred into the Waste Centre from any folder (including Waste Area) by the usual transfer process. To dispose a container, it must first be in the Waste Folder under the Manifest directory. Items need to be transferred out from the Waste Centre to generate the Waste Form, which needs to be filled in, then submitted to be ready for pickup.










If the waste setting “Automatically mark container with waste status if transferred to waste folder” is applied in the Sisot configuration, then the transferred containers will be marked as waste in the waste folder.

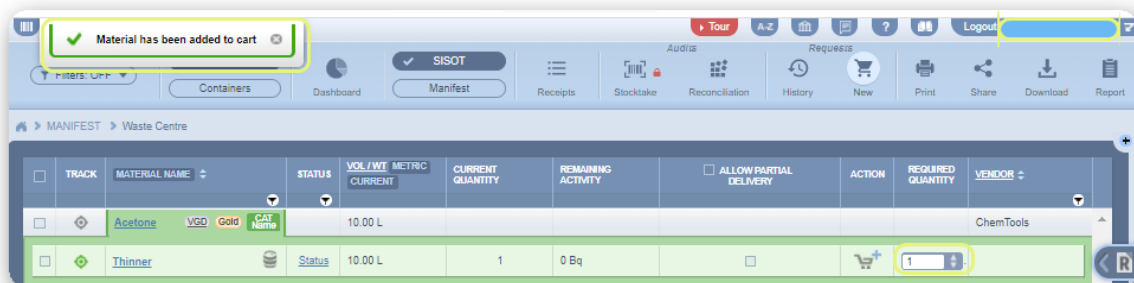
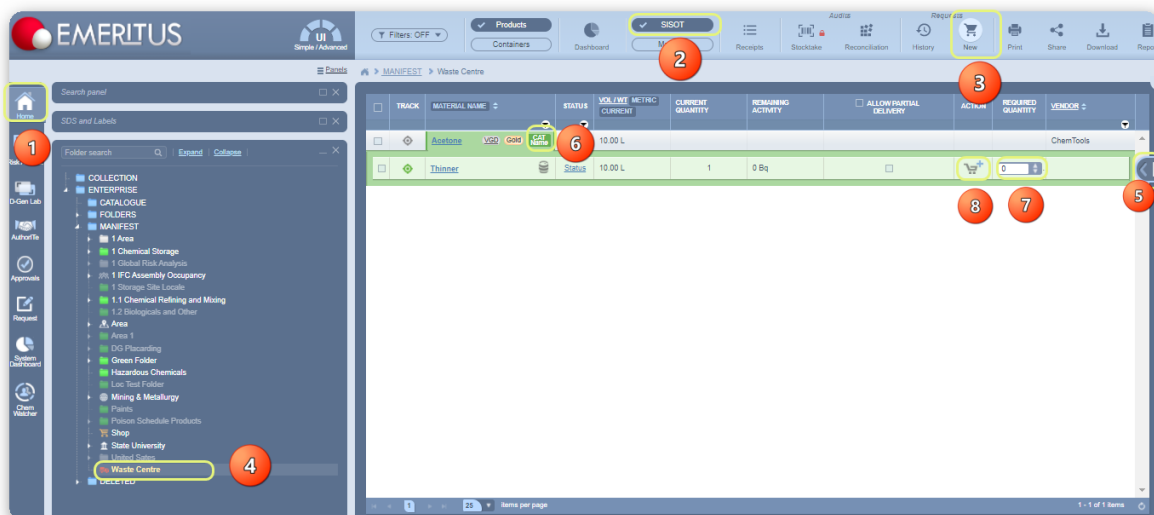
After conducting stocktake & reconciliation, some containers were marked as waste with disposal method through contractors, due to damage, or other reasons.




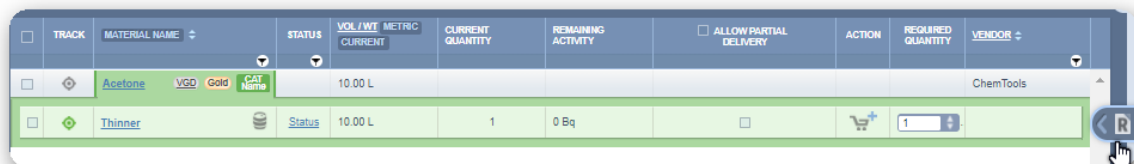
To transfer these waste containers to the waste folder, they must be transferred first as per the transfer process. For the worked example below, the waste containers have been transferred to the waste folder.

### Steps: Generate Waste from for Waste Pick Up

1. Press the **Home** module .
2. Select  the **Sisot** button on the Manifest/Sisot Toolbar.
3. Press  the **Request New** button.
4. Select  the **Waste** folder.
5. Press  the automatically opened **Waste Report Cart** panel to slide it towards the right corner.
6. Select the **Cat Name** button  to expand catalogue name row.
7. Use the upward arrow  to enter **Quantity Value** in the text field for required quantity.
8. Click  the “**Add to Cart**” icon  to place the item in the Waste Report Cart.



9. Select the **Waste Report Car slider** button  located on the middle right corner of the user interface to open the waste report cart slide panel.



**i** Note that the destination folder is not required in the Waste Report Cart.

10. Press the **Submit** button on the bottom right corner of the slide panel.

**Waste report cart**

Transfer In: ☐

<input type="checkbox"/>	CAT NO.	CAT NAME / MATERIAL NAME	VENDOR	CONTAINER SIZE	TAGS	REQUIRED QUANTITY
<input type="checkbox"/>		Thinner Acetone	ChemTools	10.0 L	CLP Hazardous Red Tag D... CoC	1

1 - 1 of 1 items

**SUBMIT**

11. The **Waste Form** is displayed with empty fields to be filled with details for Contact Person, Waste Identification, Pick Up Slip, Waste Contractor, Onsite Collection Requirement, Collection Notes & Requirements, Waste Code, etc.

**MANIFEST WASTE FORM**

This form will last for 6 days 23 hours. **SHARE**

**Contact Person**

Street Address  
City  
ST ZIP Code  
Phone  
Fax  
E-mail

**CW Waste ID** WV-0004

**Manifest Tracking ID**

Date 19/07/2021 19:05:00

**Customer ID**

**Pick Up Site**

Company Name  
Street Address  
City  
ST ZIP Code  
Phone  
US EPA ID

**Waste Contractor**

Company Name  
Street Address  
City  
ST ZIP Code  
Phone  
US EPA ID

On Site collection required? ☒ Yes ☐ No (If NO are you licensed to transport the goods? Refer to local State & Territory Legislation)

**Collection Notes & Requirements**

Note: Physical State - S = Solid, L = Liquid (less than 10% sludge), D = Sludge (includes liquids with more than 10% sludge), M = Mixed Liquid/Solid/Sludge, G = Gas

BARCODE	CAT NAME	CONTAINER SIZE	CONTAINER QUANTITY	TOTAL VOLUME	UNIT	UN NUMBER	DS	PKG	CW NUMBER	HAZARD CODE	PHYSICAL STATE	IS THE CONTAINER GOOD CONDITION?	SDS AVAILABILITY	WASTE CODE	WASTE CODE (INTERNAL)
0000972087	Thinner	10 L	1	10	L	1000	3	II	1000	H225, H302, H332, H314, H315, H319, H333, H336	L	Yes	Yes		

**ATTACHMENTS** **SIGN** **SUBMIT**

**i** Note that the US EPA ID is a United States EPA number issued by U.S Environmental Protection Agency that identifies the handler of hazardous waste manifests.

12. The Waste Form can be shared by Waste Contractors via **Share** button **SHARE** on the top of the form.

**MANIFEST WASTE FORM** This form will last for 6 days 23 hours [SHARE](#)

Contact Person: Cedric Chems  
 Street Address: 1227 Glen Guntry Rd  
 City: Glen Huntly  
 ST ZIP Code: VIC 3183  
 Phone: +61 3 9573 3100  
 Fax:  
 E-mail: cedric@chemwatch.net

Company Name: CW company  
 Street Address: 1227 Glen Guntry Rd  
 City: Glen Huntly  
 ST ZIP Code: VIC 3183  
 Phone: +61 3 9573 3100  
 US EPA ID: C103030

On Site collection required? ☒ Yes ☐ No (If NO are you licensed to transport the goods? Refer to local State)

Collection Notes & Requirements: Sign in through the capped locker using the form provided.

Waste Contractor: [Waste Contractor](#)

Shared with: [Waste Contractor](#)

Enter company names or email addresses ...

Add a note

SEND CANCEL

None: Physical State - S = Solid, L = Liquid (less than 10% sludge), D = Sludge (includes liquids with more than 10% sludge), M = Mixed Liquid/Solid/Sludge, G = Gas

BARCODE	CAT NAME	CONTAINER SIZE	CONTAINER QUANTITY	TOTAL VOLUME	UNIT	UN NUMBER	DG	PKG	CW NUMBER	HAZARD CODE	PHYSICAL STATE	IS THE CONTAINER GOOD CONDITION?	SDS AVAILABILITY	WASTE CODE	WASTE CODE (INTERNAL)
0000972087	Thinner	10 L	1	10	L	1000	3	II	1000	H225, H302, H332, H314, H315, H333, H335	L	Yes	Yes	W-00014	W-00005

ATTACHMENTS SAVE SUBMIT

The respective receiver of the waste form link will then be able to access the Waste Form, edit it, add attachments and save changes.

donotreply@chemwatch.net <donotreply@chemwatch.net>  
 to me

**CW company** [edit](#) [TheFollowingDocMsg](#):

Waste Form ID no.: [W-0004](#)

**Notes:** Manifest Waste Folder Waste Form shared.

[Open Waste Forms](#)

**i** The **File** maximum size of 10 MB **Attachment** is allowed including the listed file extensions.

**MANIFEST WASTE FORM** This form will last for 6 days 23 hours [SHARE](#)

Contact Person: Cedric Chems  
 Street Address: 1227 Glen Guntry Rd  
 City: Glen Huntly  
 ST ZIP Code: VIC 3183  
 Phone: +61 3 9573 3100  
 Fax:  
 E-mail: cedric@chemwatch.net

Company Name: CW company  
 Street Address: 1227 Glen Guntry Rd  
 City: Glen Huntly  
 ST ZIP Code: VIC 3183  
 Phone: +61 3 9573 3100  
 US EPA ID: C103030

On Site collection required? ☒ Yes ☐ No (If NO are you licensed to transport the goods? Refer to local State)

Collection Notes & Requirements: Sign in through the capped locker using the form provided.

Attachments

Attach File: [SELECT](#)

Following extensions are allowed: [jpg](#), [bmp](#), [png](#), [pdf](#), [txt](#), [xls](#), [xlsx](#), [doc](#), [docx](#), [rtf](#), [csv](#) Max size is 10 MB

NAME DESCRIPTION DATE

0 10 Items per page No items to display

ATTACHMENTS SAVE SUBMIT

13. On the Waste Form contact person, pick up site and waste contractor's contact information can be pre-filled from the address book.
14. Once the form is submitted the link expires. **Expiry of waste forms** can be set in Sisot Settings->Waste Settings> for automatic expiry date: choose 7, 14 or 21 days. For example, a 7-day expiry will show in the form as a count down.

**MANIFEST WASTE FORM**

CW Waste ID: W-0004


Manifest Tracking ID: WF35-01






Date: 19/07/2021 19:05:06

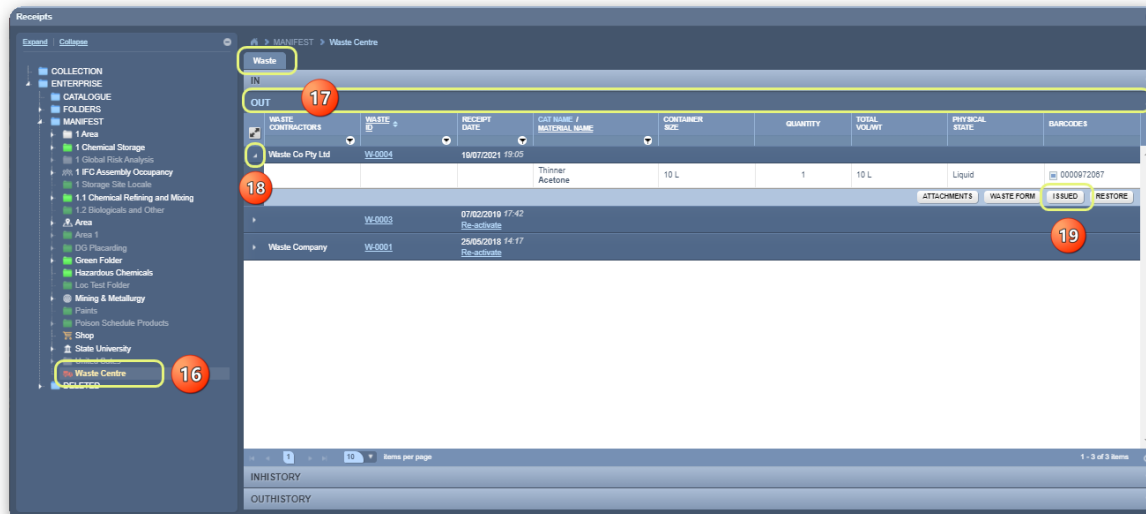
Customer ID: CW3183

This form will last for **6 days 23 hours.**


SHARE

**i** Once a Waste Form expires, the waste receipts still stay in the Receipts Out view, where; the expiry can be reset by clicking  on the **Re-activate** button.

15. After the form is submitted, select  the **Receipt mode** button on Sisot toolbar.
16. Select  the **Waste Folder**.
17. Select  the **Receipt Out** tab.
18. Click  the **expand arrow** to view waste company details.
19. Click  on the **Issued** button in the Receipt Out view mode to check the issued items.



The screenshot shows the 'Receipts Out' view in the Sisot application. On the left, a sidebar contains a tree view of folders, with 'Waste Centre' selected and highlighted by a yellow box and callout 16. The main area displays a table of waste receipts. The table has columns for 'WASTE CONTRACTORS', 'WASTE ID', 'RECEIPT DATE', 'CAT NAME / MATERIAL NAME', 'CONTAINER SIZE', 'QUANTITY', 'TOTAL VOLUME', 'PHYSICAL STATE', and 'BARCODES'. The first row shows 'Waste Co Pty Ltd' with waste ID 'W-0004' and receipt date '19/07/2021 19:05'. Below this, a detailed view of the receipt is shown, including 'Waste Company' 'W-0001' and receipt date '25/06/2018 14:17'. Callout 17 points to the 'Waste' tab at the top. Callout 18 points to the 'Expand' arrow next to the first row. Callout 19 points to the 'ISSUED' button in the bottom right corner of the receipt details section.

20. Then, click  on the **Accept** button and finally, the personnel collecting the waste from the contractor needs to sign the form.

UN NUMBER	CAT NAME / MATERIAL NAME	CONTAINER SIZE	ISSUED QUANTITY
1090	Thinner Acetone	10 L	1

1 - 1 of 1 items

ACCEPT CANCEL

Collected By


Scan ID or Electronic signature...

John Smith

YES NO

**i** Issued Waste Forms can be viewed in the Receipt Out History view.

WASTE CONTRACTORS	WASTE ID	RECEIPT DATE	ISSUE DATE	CAT NAME / MATERIAL NAME	CONTAINER SIZE	QUANTITY	TOTAL VOL/WT	PHYSICAL STATE	PICK UP BY	BARCODES
Waste Co Pty Ltd	WV-0004	19/07/2021 19:05	19/07/2021 20:26	Thinner Acetone	10 L	1	10 L	Liquid	John Smith	
										ATTACHMENTS WASTE FORM

21. Clicking  on the **Restore** button in the Receipts Out view, before the submission of the form, then those items in this receipt will be restored to the Waste Centre folder and the receipt is removed from receipt Waste Out view. The Waste Form link becomes inactive immediately once the receipt is removed.

WASTE CONTRACTORS	WASTE ID	RECEIPT DATE	ISSUE DATE	CAT NAME / MATERIAL NAME	CONTAINER SIZE	QUANTITY	TOTAL VOL/WT	PHYSICAL STATE	BARCODES
Waste Company	WV-0003	07/02/2019 17:42	Re-activate						
Waste Company	WV-0001	25/05/2019 14:17	Re-activate	thinner55 Acetone	20 L	1	20 L	Liquid	0000000141

ATTACHMENTS WASTE FORM ISSUED RESTORE

22. Select the **Add Attachments** button to upload a file to the Waste ID record.


The screenshot shows a 'Waste ID' record form. The 'ATTACHMENTS' button is highlighted with a yellow box. The form includes fields for WASTE CONTRACTORS, WASTE ID, RECEIPT DATE, CAT NAME / MATERIAL NAME, CONTAINER SIZE, QUANTITY, TOTAL VOL/WT, PHYSICAL STATE, and BARCODES.

23. Press  the **Select** button to attach a file.


The screenshot shows the 'Attachments' dialog box. The 'SELECT...' button is highlighted with a yellow box. The dialog box lists allowed file extensions: .jpg, .bmp, .png, .pdf, .txt, .xls, .xlsx, .doc, .docx, .rtf, .csv. It also states 'Max size is 10 MB'.

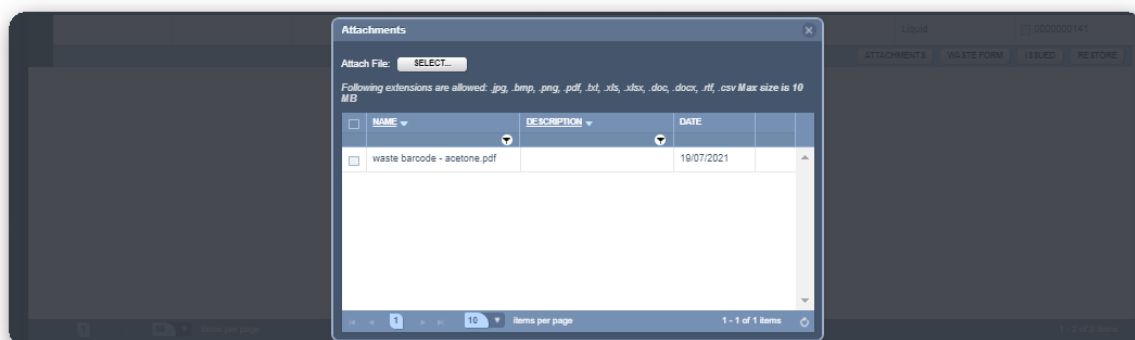
These file extensions are acceptable.

.jpg, .bmp, .png, .pdf, .txt, .xls, .xlsx, .doc, .docx, .rtf, .csv with Max file size of 10MB

24. Upload a file from your desktop or external drive.  
25. Enter a description of the attachment  
26. Press  the **Save** button to upload attached file.

The screenshot shows the 'Attachment' dialog box. The 'SAVE' button is highlighted with a yellow box. The dialog box contains the text 'waste barcode - acetone.pdf' and a 'Description' field.

Attachment is added. The attached file can also be downloaded from the download icon  on right handside of the Attachment's window.



## Adding Waste Containers

Containers can be added directly into the Waste Centre folder the same way as non-waste containers, by using the **Container Add/Edit Wizard**. Waste containers added this way will automatically have the status "**Waste - Contractors**" and reason "**Generated Waste**". These containers can also be transferred out from the Waste Centre by adding them to the Waste Report Cart.



## 7.0 The Search Function in Sisot

HOME | SISOT | SEARCH FUNCTION

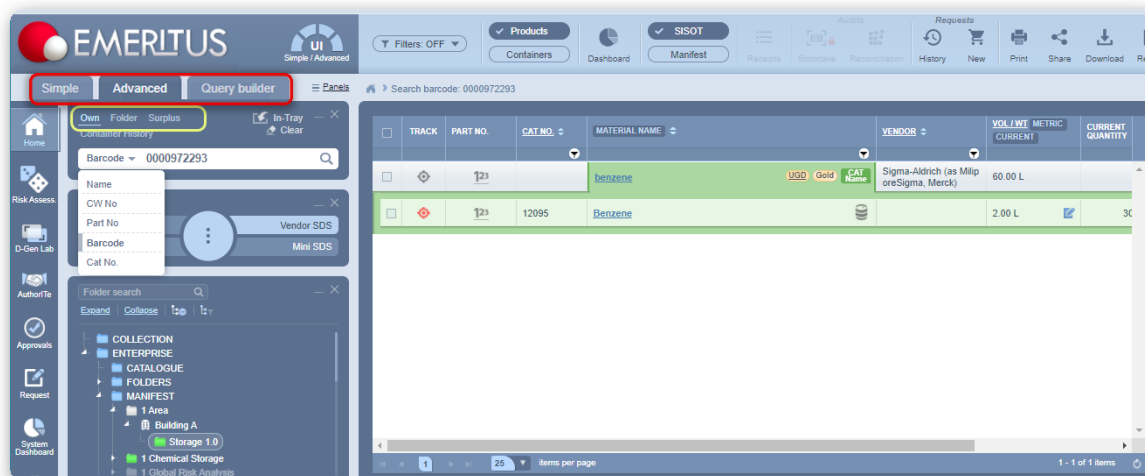
This topic will cover the following objectives;

- How to search for container in Own inventory
- How to search for container in a folder
- How to search for container by barcode
- How to search for surplus container
- How to create an automatic, mixed or manual tag
- How to build a search query and associate it with a tag
- How to search by a query to locate specific container data



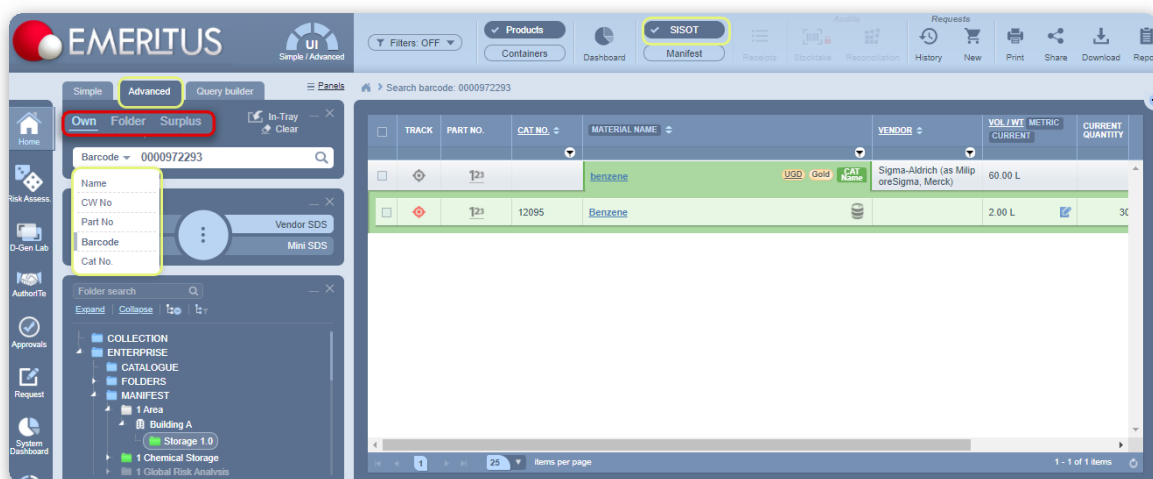
The search functions when in Sisot mode are solely dependent on the availability of container data in your inventory within the system. However, if there are no containers, barcodes available for your materials in Manifest mode, the barcode search option will not render any specific container data using the following search modes.

Search Mode	Description
Simple	Search for products in own inventory, folder and surplus.
Advanced	Search for products in own inventory, folder and surplus using specific advanced search options; CW No, Part No, Barcode, Cat No.
Query Builder	Search for products that meet the query criteria and forms can also be associated with any query to drive specific products and container by using report generator.

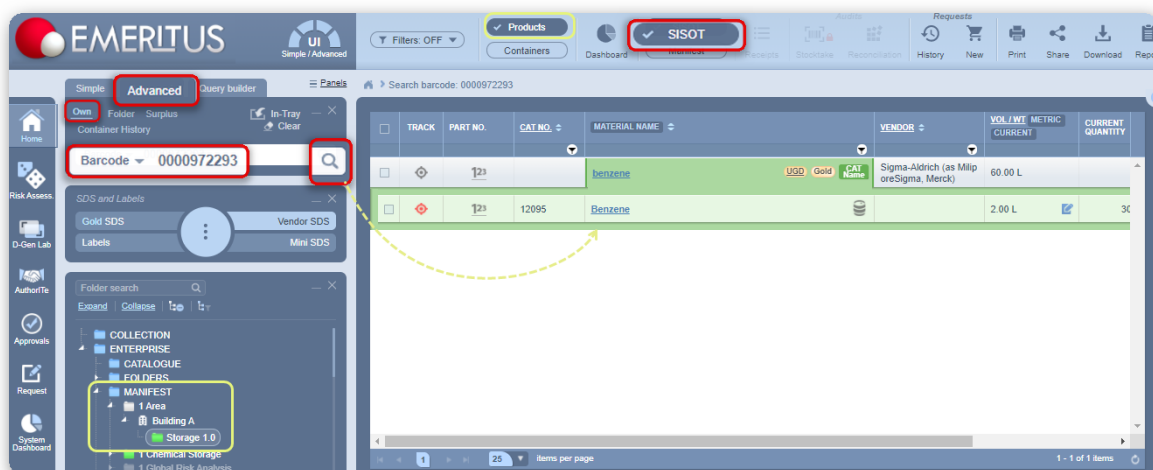


## Search Path Description

Own	Inventory materials located in the organisation's own collection.
Folder	Search for containers from current folder.
Surplus	Containers considered to being 'excess assets' that are no longer required and are marked as such.



**i** Search in Sisot Mode works with available container related information. In this section, it assumed that your inventory contains containers with specific data such as barcodes, vendor, cat names, container sizes. To add containers to material, use the container wizard in section 1 of this guide.

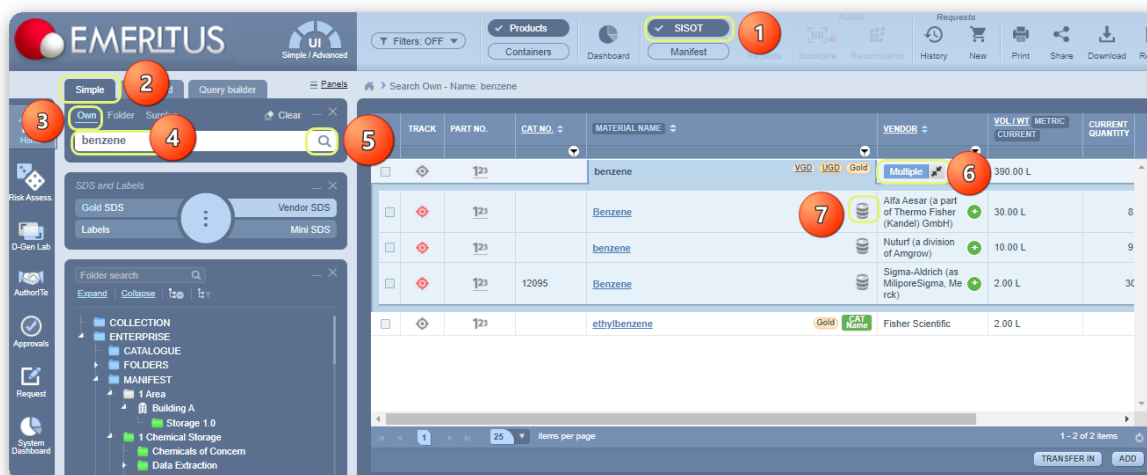


## 7.1 Simple Search for Products in Own Inventory

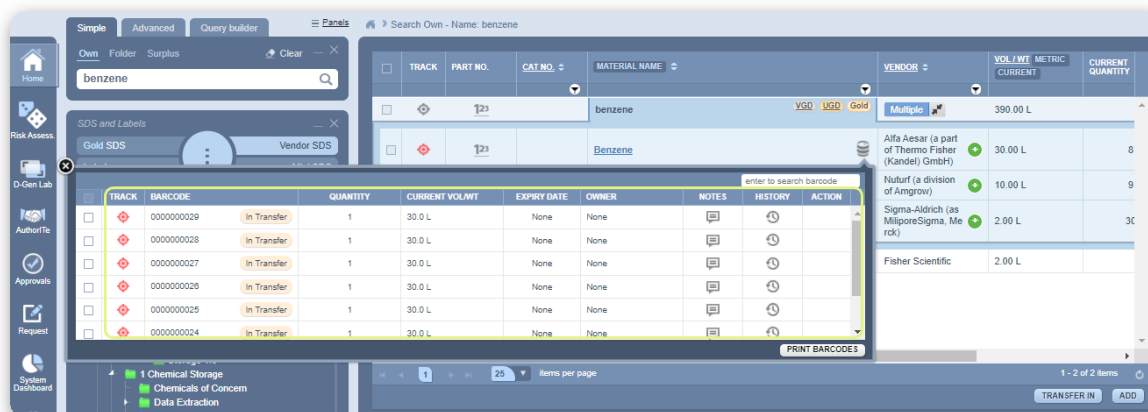
The following steps show how to search for products in your own inventory using the Simple Search mode in Sisot module.

### Steps: Search for Container in Own Inventory by Product Name

1. Select the **Sisot module**.
2. Press the **Simple** tab in the Search panel.
3. Press the **Own** path.
4. Type the **Product name** in the free text field.
5. Click the **Magnifying Glass** to search for the product.
6. Select the **Multiple** button from the materials grid to view the cat names (products).
7. Click the **Container** icon in the subgrid alongside the product's cat name.



8. If the product contains multiple containers, the container barcode window will display a list of barcodes and their respect status if in transfer process, current quantity, volume/weight, expiry date, and owner.

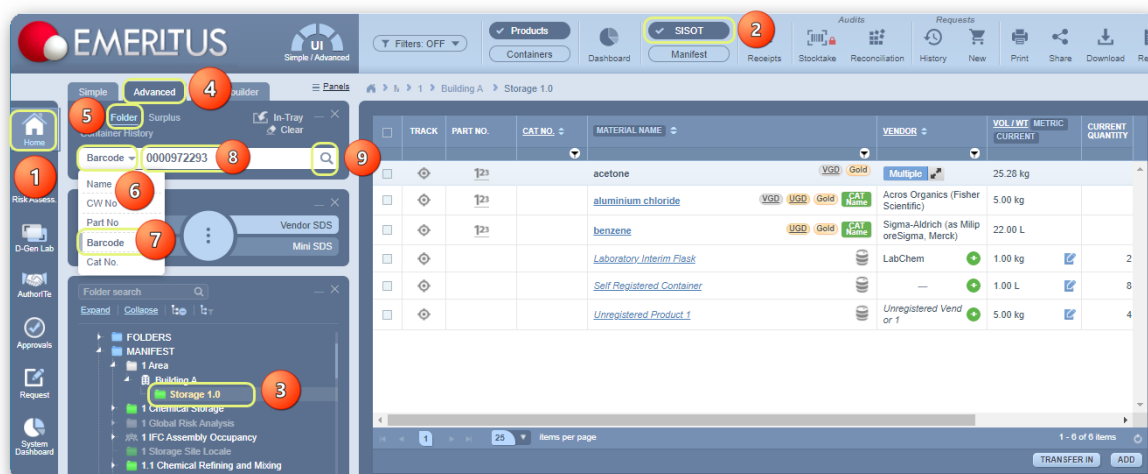


## 7.2 Advanced Search for Container in a Folder

The following steps show how to search for products in a folder using the Simple Search mode in Sisot module.

### Steps: Search by Barcode for container in own folder inventory

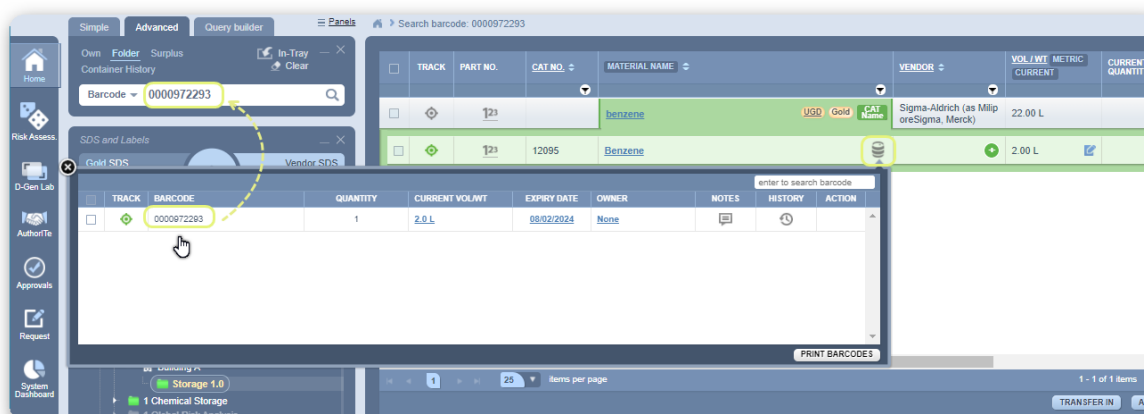
1. Press the Home module .
2. Press the Sisot button from the Manifest/Sisot toolbar.
3. Click the storage Folder name where the container is located.
4. Press the Advanced tab in the Search panel.
5. Click the Folder search path option to direct the search to the folder inventory.
6. Select the Advanced search drop-down arrow.
7. Select the Advanced search option; Barcode.
8. Type the Container Barcode in the free text field.
9. Press the Magnifying Glass to search.



10. Press the Cat Name button to expand the row to view the product's container information in the subgrid.



11. The container barcode in folder search results match the barcode's container details.



## 7.3 Advanced Search for Container by Barcode

The following steps show how to search by barcode for products in your own inventory using the Advanced Search mode in Sisot module.

### Steps: Search for container in own inventory by barcode

1. Press the Home module .
2. Press the Sisot button from the Manifest/Sisot toolbar.
3. Press the **Advanced** tab in the Search panel.
4. Click the **Own** search path option to direct the search to own inventory.
5. Select the Advanced search **drop-down** arrow.
6. Select the Advanced search option; **Barcode**.
7. Type the **Container Barcode** in the free text field.
8. Press the **Magnifying Glass** to search.
9. Press the **Cat Name** button to expand the row to view the product's container information in the subgrid.

EMERITUS

Filters: OFF

Products

SISOT

Manifest

Search barcode: 0000972293

TRACK	PART NO.	CAT NO.	MATERIAL NAME	VENDOR	VOL / WT	METRIC	CURRENT QUANTITY
	12095		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	60.00 L		
	12095		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.00 L		30

Red track icon means that the product is not located in current search results but in any of the highlighted folder(s) under the Manifest directory.

10. The container barcode search results match the barcode's container details.

EMERITUS

Filters: OFF

Products

SISOT

Manifest

Search barcode: 0000972293

TRACK	PART NO.	CAT NO.	MATERIAL NAME	VENDOR	VOL / WT	METRIC	CURRENT QUANTITY
	12095		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	60.00 L		
	12095		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.00 L		30

enter to search barcode

PRINT BARCODES

11. Press the Red Track icon to identify the respective folder(s) where the barcode container is located within the folder structure.

EMERITUS

Filters: OFF

Products

SISOT

Manifest

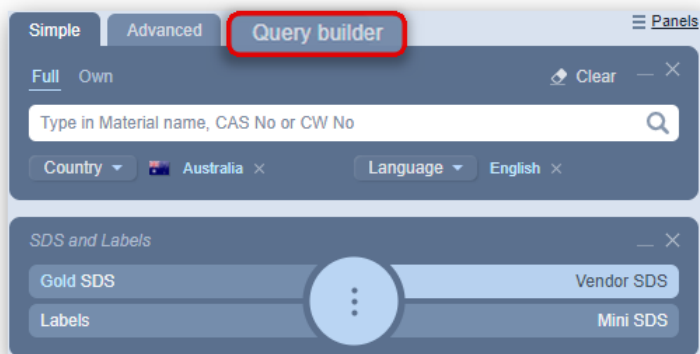
Search barcode: 0000972293

TRACK	PART NO.	CAT NO.	MATERIAL NAME	VENDOR	VOL / WT	METRIC	CURRENT QUANTITY
	12095		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	60.00 L		
	12095		Benzene	Sigma-Aldrich (as MiliporeSigma, Merck)	2.00 L		30

Tracked barcode displays highlighted folders where the container is located.

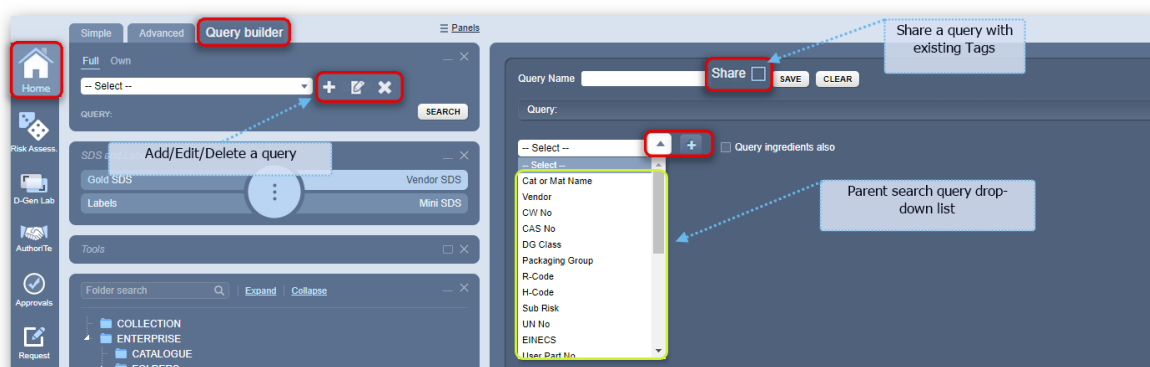
## 7.4 Create a Sisot Query

The primary objective of Query Builder Search is to provide advanced users to build specific queries to search for products of interest based on defined criteria.



This extended search method provides users with the ability to look up for materials based on the following context:

- Search by creating a specific query
- Include Ingredients to the search Query (optional)
- Associate a query by using tags



### Logical Operands

A query is built by selecting a search index from the context menu options and can also choose a database logical operand “AND, OR” for complex searches to extend the search further.

Operator	Description
AND	Retrieves records that contain the word or term
OR	Broadens the records that contain the word or term

## Field Types

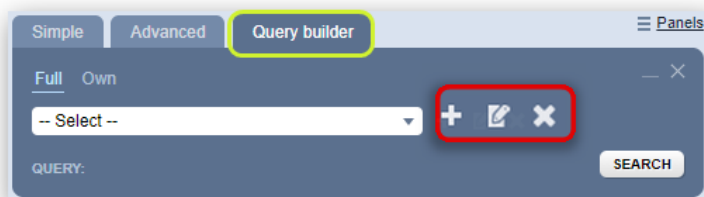
String values and numbers can be applied in a search query as per the following operands.




String Operands	Image – Drop Down List
Equals	
Not Equal	
Contains	
Does not contain	
Starts with	
Ends with	
Does not start with	
Does not end with	
Number Operands	Image – Drop Down List
=	

## Add/Edit a Query

The Query Builder mode will show the three buttons to “Add”, “Edit” or “Delete” queries.










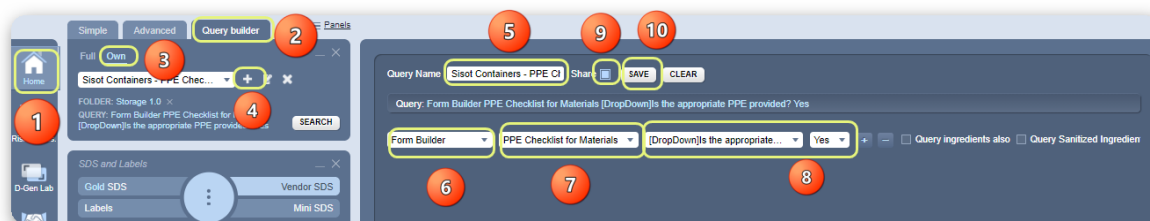



Button	Description
Add 	The Add button enables a user to create a query
Edit 	The Edit button provides a user with the ability to edit an existing query
Delete 	The Delete button allow a user to remove a query




The following steps show how to create a search query using Query Builder criteria in Sisot module.

#### Steps: Create a Sisot Containers – PPE Checklist Query

1. Select  the **Home** module .
2. Press  the **Query Builder** button from the Search Panel.
3. Click  the **Add** icon.
4. Type the **Name of the Query** in the Query Name text field, e.g., Sisot Containers-PPE Checklist.
5. Click  the **drop-down arrow**  to select the Search option from the drop-down list, e.g., Form Builder, which means that a form has been created to collect information. For example, PPE Checklist Form (filled by users) to be used to collect information for specific materials.
6. Choose  the appropriate **Form Name**.



7. Click  the drop-down arrow to choose the type of container information applicable to identify Sisot containers, e.g., Containers that have GHS labelling.






8. Select  the form field to be used in the search criteria, e.g., Yes.
9. Click  the **Share Checkbox** to associate a tag if a tag has been created. To create a tag, refer to Chemeritus User Guide.
10. Click  the **Save** button.

The next topic shows how to perform a search using the created query.

## 7.5 Query Search for Product Containers

The following steps show how to search for products using the Query Builder mode in Sisot module.

### Steps: Search for Containers in Own Inventory Folder by Query Name

1. Select  the **Sisot module**.
2. Select  **Folder name**.
3. Press the **Query Builder** tab.
4. Select  the **Own** path.
5. Click  on the **drop-down** arrow to select **Query Name**.
6. Click  the **Search** button.

EMERITUS

Simple / Advanced

Filters: OFF

Products

Containers

Dashboard

Receipts

Stocktake

Reconciliation

History

New

Print

Share

Download

Report

Simple / Advanced

Query builder

Full

Over

Sisot Containers - PPE Chec...

FOLDER: Storage 1.0

QUERY: FormBuilder (DropDown) 102442

SEARCH

SDS and Labels

Gold SDS

Vendor SDS

Labels

Mini SDS

Folder search

Expand

Collapse

Collection

Enterprise

Catalogue

Folders

Manifest

Area

Building A

Storage 1.0

Chemical Storage

TRACK	PART NO.	CAT NO.	MATERIAL NAME	VENDOR	VOL / WT	METRIC	CURRENT QUANTITY
	123		acetone	VGD Gold	Multiple	25.28 kg	
	123		aluminium chloride	VGD UGD Gold CAT Name	Acros Organics (Fisher Scientific)	5.00 kg	
	123		benzene	UGD Gold CAT Name	Sigma-Aldrich (as MiliporeSigma, Merck)	22.00 L	
			Laboratory Interim Flask	LabChem	1.00 kg		2
			Self Registered Container		1.00 L		8
			Unregistered Product 1	Unregistered Vendor or 1	5.00 kg		4

1 - 0 of 0 items

TRANSFER IN

ADD

7. Press the Containers button.

Products

Containers

Print

Share

Download

Report

Search Own - Query: Sisot Containers - PPE Checklist for Materials (shared)

TRACK	HAZARD	PART NO.	MATERIAL NAME	CAS NUMBER	VENDOR	RISK STATEMENT	TAGS	VOL / W	CURRE
		123	acetone Issue Date: 08/12/2004; Extraction Date: 09/05/2020;	67-64-1	3M	R11,R38,R68,R67	CLP Hazar... Red Tag D... CoC	10.00 L	
		123	BENZENE, 99.9+%, HPLC GRAD Issue Date: 31/01/2003; Extraction Date: 06/10/2017;	71-43-2, 1053658-43-7, 1173023-23-3, 174973-66-1, more	Sigma-Aldrich (as MiliporeSigma, Merck)		Restricted... CLP Hazar... Red Tag D... NZ Regs Carcinogens H220 Extr... CoC Netherland...	60.00 L	
		123	chloric acid	7790-93-4		R2,R8,R36	Chem Sec... Ucar Extre... Red Tag D...	0.00 L	

1 - 3 of 3 items

8. Click the expand to view all the grid columns.

Building A > Storage 1.0

8

Drag a column header and drop it here to group by that column

	TRACK	BARCODE	CAT NUMBER	PART NUMBER	CAT NAME	EXPIRY DATE	VENDOR	VOL / WT
<input type="checkbox"/>		0000972313	Not defined	123	ACETONE	None	Concept Paints	2 l
<input type="checkbox"/>		0000972321	Not defined	123	ACETONE	None	Concept Paints	2 l
<input type="checkbox"/>		0000972314	Not defined	123	ACETONE	None	Concept Paints	2 l
<input type="checkbox"/>		0000972315	Not defined	123	ACETONE	None	Concept Paints	2 l
<input type="checkbox"/>		0000972325	AS-0192-6360-2	123	acetone	None	3M	10 l

1 - 25 of 34 items

ADD

9. All columns in the grid shown depict Sisot datapoints. Drag a column header and drop it on the top left above the grid to group by that column.

Drag a column header and drop it here to group by that column

	TRACK	BARCODE	CAT NUMBER	PART NUMBER	CAT NAME	EXPIRY DATE	VENDOR	VOL / WT	TAGS	OWNER
<input type="checkbox"/>		0000972313	Not defined	123	ACETONE	None	Concept Paints	2 l	CLP Hazardous Red Tag D... CoC X	None
<input type="checkbox"/>		0000972321	Not defined	123	ACETONE	None	Concept Paints	2 l	CLP Hazardous Red Tag D... CoC X	Administrator
<input type="checkbox"/>		0000972314	Not defined	123	ACETONE	None	Concept Paints	2 l	CLP Hazardous Red Tag D... CoC X	None
<input type="checkbox"/>		0000972315	Not defined	123	ACETONE	None	Concept Paints	2 l	CLP Hazardous Red Tag D... CoC X	None
<input type="checkbox"/>		0000972325	AS-0192-6360-2	123	acetone	None	3M	10 l	CLP Hazardous Red Tag D... CoC X	Administrator

1 - 25 of 34 items

For more information about the system's other module and features, refer to the Chemeritus Guide or Chemeritus Elearning Tutorial.

## Resource

## Documentation & Learning



### Elearning

This button is located on the top middle right area of the user interface provides access to elearning tutorial by applications, modules, and translations.



### Manual

This button is located on the top middle right area of the user interface and provides access to the application's user guide for download.



**IT'S NOT THE HAZARD  
IT'S THE RISK!**

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