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1. **Introduction to eRPortal**

eRPortal’s Hazardous Materials and Waste Tracking Module automates the entire process of managing hazardous materials from cradle to grave. This is a quick and easy way to track chemicals in your laboratory.

Using eRPortal you can easily enter new chemicals into the system, as well as enter additional quantities of existing chemicals. Upon entering chemicals, if the chemical is already in the system, most of the chemical information is populated into the fields so that you do not need to manually enter the same chemical information every time an additional quantity is added.

Within eRPortal you can additionally see all chemicals in your laboratory’s inventory and sort by various criteria including location, CAS Number, Description and more. You can view chemical information, the Material Safety Data Sheet (MSDS), and a transaction log that records usage for each item in your inventory.

This manual guides you through the Hazardous Materials and Waste Tracking Module and discusses the most important functions that you will need to establish and maintain your chemical inventory.

2. **Getting Started**

2.1 **System Requirements**

To work with eRPortal you will need:

1. Internet explorer 5.5 or higher on Windows, or Fire Fox on a Mac.
2. User ID, new users may request access from labsafety@lakeheadu.ca Indicate which laboratory’s inventory you should be attached to.

2.2 **Adding the eRPortal Shortcut to your Desktop**

1. Open Internet Explorer.
2. Enter the URL http://erportal.lakeheadu.ca/erportal/eRPortalApp/Login.asp
3. Log into the system with your Lab ID, User ID and Password.
4. Right click on the login page and select “Create Shortcut”. You now have access to the eRPortal Hazardous Materials and Waste Tracking system.
5. Optional: Add eRPortal icon to your newly created shortcut.
a. Download the eRPortal icon from the Health & Safety website.
b. Right click on the current icon and choose “Properties”.
c. Click on “Change icon” and browse to find eRPortal icon you’ve downloaded.

3. Managing Inventory in Your Lab

The Lab Inventory utility allows you to view a list of all chemical items in your inventory. This list can be sorted and filtered by various criteria. From there, you can view chemical details, transaction logs and MSDS for the chemicals. Additionally, using this utility you can edit chemical details and even request a waste pickup for specific items.

3.1 Viewing Item Details

1. From the Home Page of eRPortal’s Hazardous Materials and Waste Tracking Module, select the “Lab Inventory” button.

The Hazardous Materials Search utility opens, listing the fields by which you can filter a chemical item search.
2. Enter any filtering criteria into the fields with this utility, based on the chemical or group of chemicals you are searching for. Each field provides a dropdown menu from which you can select “Contains”, “Starts With” or “Is Exactly”, depending on the item information that is known. Note, you can search using more than 1 criteria at a time.

3. Once all necessary information has been entered, click the “Search” button at the bottom of the Hazardous Materials Search utility. The Hazardous Materials Finder utility opens, listing all chemical items that match the filter criteria that was entered, as shown in the screen shot below.

**Hint** - If you do not enter a search criteria the Hazardous Materials finder will list all chemical items in your inventory.
4. View chemical item information within the grid. Each grid line lists the items Serial #, Item #, CAS #, Description, Customer ID, Supplier, Building-Room, Location, Quantity and Expiration Date.

5. To view more detailed information about an item, including health risks and necessary PPE (Personal Protective Equipment), click the items Serial #.

The Hazardous Materials Item Detail opens, listing detailed item information and displaying a grid of all the transactions that have occurred for the item. See below.
6. Review the chemical information and transaction history as necessary.

7. To see the chemicals Material Safety Data Sheet (MSDS) click on the “View MSDS” link.

8. Each inventory item will be assigned a unique serial number. If you would like to print a label for the chemical item, select “Print Label” button. The label opens in a new window where it can be printed by selecting the printer icon at the top-left corner of the window. Close the window when complete.

### 3.2 Editing a Chemical Item’s Information

1. From the Hazardous Materials Finder, click the “Update” link at the right-side of the grid-line.

   ![Hazardous Materials Finder](image)

   The Hazardous Materials Item Update utility opens.
2. Edit information within the Hazardous Materials Item Update utility as necessary.

3. After making any changes to the chemical item information select the “Save” button at the bottom of the screen. The changes are saved and you will receive a message at the top of the screen in red stating “Serial Number XXXXXX successfully updated”. Select the “Return” button at the bottom of the screen to return to the Hazardous Materials Finder utility.

### 3.3 Disposing of Inventory Items

1. Using the Hazardous Materials Finder, click the “Update” link at the right-side of the grid-line for the item. The Hazardous Materials Item Update utility opens.
2. To dispose of an inventory item edit information within the Hazardous Materials Item Update utility. First mark the checkbox indicating the item as Disposed. Next select the method of disposal, choosing the most appropriate description.

3. To finish and dispose of this item from your inventory select the “Save” button at the bottom of the utility. The item is removed from your inventory and you are automatically returned to the Hazardous Materials Search utility. A confirmation message in black text will appear at the top of the page stating “Serial Number XXXXXX successfully disposed”.

### 3.4 Disposing of Inventory Items and Requesting a Waste Pickup

Some items require special disposal procedures. To dispose of an inventory item that must be submitted to a waste carrier for disposal you must complete a waste request.

1. Using the Hazardous Materials Finder, click the “Update” link at the right-side of the grid-line for the item. The Hazardous Materials Item Update utility opens.

2. To dispose of an inventory item and request a waste pickup first mark the checkbox indicating the item as Disposed. Next select the method of disposal, choosing “Disposed via Haz Waste Contractor”.

Some items require special disposal procedures. To dispose of an inventory item that must be submitted to a waste carrier for disposal you must complete a waste request.

1. Using the Hazardous Materials Finder, click the “Update” link at the right-side of the grid-line for the item. The Hazardous Materials Item Update utility opens.

2. To dispose of an inventory item and request a waste pickup first mark the checkbox indicating the item as Disposed. Next select the method of disposal, choosing “Disposed via Haz Waste Contractor”.

1
3. Indicate the container type (glass, plastic, etc.).

4. Mark the checkbox for “Request Waste Pickup”. There is a space for additional comments if necessary.

5. To finish and dispose of this item from your inventory select the “Save” button at the bottom of the utility. The item is removed from your inventory and a waste request has been generated. You will be automatically returned to the Hazardous Materials Search utility. A confirmation message in black text will appear at the top of the page stating “Serial Number XXXXXX successfully disposed. Waste pickup request XXXXXX created”.

### 3.5 Viewing a Chemical’s Material Safety Data Sheet (MSDS)

1. From the Hazardous Materials Finder, click on the “View MSDS” link at the far right-side of the grid-line of the item. A MSDS for the product will open in a new window.
3.6 Additional Buttons within the Hazardous Materials Finder Utility

The buttons at the bottom of the Hazardous Materials Finder provide additional functions, as discussed below:

- The “New Search” button returns you the initial Hazardous Materials Search utility from where you can start a new chemical search.
- The “Back” button returns you to the last page you viewed.
- The “Dispose” button allows you to mark the selected item(s) as disposed. Before clicking this button, select the items you want disposed by clicking the check-box(es) at the left-side of the
grid. After clicking this button, you are brought back to the Hazardous Materials Search utility. A confirmation message appears at the top of the screen stating that the selected Serial Numbers have been marked as disposed.

- The “Home” button returns you to the home page of the Hazardous Materials and Waste Tracking system.

4. **Entering Chemicals into your Inventory**

The Chemical Entry utility allows you to enter chemicals into the system. If you are entering additional quantities of chemicals already in the system, chemical information will populate into the various fields upon CAS# entry, Catalog Number entry, or Description entry. If you are entering a new chemical into the system, information can be entered manually.

4.1 **Entering a Chemical into your Inventory**

1. From the Home Page, select the Chemical Entry button.

The Chemical Entry utility opens.

2. Select the “Building” and the “Room” from the drop down menu.

3. Enter the Catalog Number for that particular item. If there is no Catalog # select the “Find Chemical” button at the end of the Catalog Number field. There is likely a Catalog # created in the system for these products (i.e. Using the prefix “SPEC” or “CHEM”).
A dialog box opens.

4. From the dialog box, enter all or part of the “CAS Number”, “Description”, or “Catalog #” of the item you are entering into the system. Depending on the information that is known, select either “Contains”, “Is Exactly”, “Starts With” or “Ends With” from the appropriate dropdown menu.

5. When the appropriate information has been entered, select the “Search” button at the bottom of the dialog box. A list of all chemicals in the system that match the criteria entered populated into the dialog box.

6. Select the chemical you want to enter by clicking the “Select” link on the left side of the grid-line of the chemical. The chemical opens in the Chemical Entry utility. The chemical’s Catalog #, CAS Number, Description, and any additional chemical safety information that has been previously entered populates into the Chemical Entry utility.
Note, if there is no Catalog # available in the system you will need to generate a new one. Select the “Auto” checkbox and eRPortal will generate a new Catalog number.

7. The “Date Received” field populates with the present date. The “Faculty Advisor” field populates with the designated faculty advisor or the name of your lab. “Received by” populates with the username you are working under.

8. Enter additional information about the item into the Chemical Entry utility. Catalog Number, CAS Number, Description, Supplier, Quantity (Number of items to enter), Size (weight or volume of product), UM (Unit of Measure) and Expiration Date are required fields.

Note, if your item is a mixture of different components include each CAS Number by using the “multi” button. A new window will open where you can type in each CAS Number separated by a comma, no spaces.
9. It is recommended also to include: Locations, Grade, Storage Group, State and any information known about NFPA rating, PPE required and WHMIS codes.

10. If the chemical is a Designate substance (lead, mercury, etc.) ensure you click the “Designate Substance” check the box.

11. Once all chemical information has been entered, select the “Add Line” button at the bottom of the Chemical Entry utility.
The Received chemical appears in the grid at the bottom of the utility. The Chemical Entry utility clears allowing you to receive more chemicals (from the same supplier), if necessary.
10. Enter additional chemicals from the same supplier into the system, selecting “Add Line” each time. If you need to remove a line item select “Delete” to delete it from the list of items to be uploaded to the inventory.

11. When you are finished select the “Save” to add all line items to your inventory. A label will be generated. You may choose to print the label or create your own including the items uniquely assigned Serial Number.

12. When finished close this window and select the “Save” button again.

**4.2 Entering Material Safety Data Sheet (MSDS) for Inventory Items**

When entering inventory items a Material Safety Data Sheet must be attached to each entry. You will encounter one of two scenarios;

1. An MSDS specific to your Items Catalog Number will already be on file. When you enter a new item in the Chemical Entry utility, under MSDS you will see “MSDS exists, View”.

2. The second scenario you may encounter is a new inventory item without a MSDS on file. When you enter a new item in the Chemical Entry utility, under MSDS you will see a “Browse” button.

Click on the “Browse” button to upload from your computer the product specific MSDS for this item. Contact labsafety@lakeheadu.ca or 343-8806 if you encounter any problems with the chemical entry utility.
5. Managing Waste in Your Lab

5.1 Waste Pickup Request Utility

The waste pickup request utility allows you to enter a waste pickup request at a designated location for a list of waste items.

1. From the Home page, select the “Waste Pickup Request” button

The “Hazardous Waste Pickup Request” screen opens. The user’s name who is logged into the system populates into the “Entered By” field. This information will appear in the header in the final waste request.
2. Enter the “Current Loc. Building” and “Current Loc. Room” where the chemical waste is currently being stored.

3. The “Room code” field and “Department” will automatically populate.

4. Enter a contact “Phone #”.

5. Enter any additional “Comments” you would like to appear on the waste pickup request.


7. Select the “Waste Type” from the dropdown menu.

8. Enter a “Waste Description” for the item (eg. Acetic Acid Waste, 5% NaOH, COD Waste, etc.)

9. Enter the “State” of the waste- either Liquid or Solid

10. Select the “Supplier” of the waste items from the dropdown menu.
11. Enter the number of “Containers to Pickup”.

12. Enter the “Container Type” (e.g. Plastic, glass, etc.).

13. Enter the “Container Size” by first entering a value, then select the unit of measure using the dropdown menu.

14. Enter the “Waste Quantity” by first entering a value, then select the unit of measure using the dropdown menu. For instance, if you indicated that there will be 3 containers of waste, each with 1 Litre, in total the waste quantity is 3 litres.

**NOTE**: When grouping multiple waste items their chemical composition must be identical, otherwise separate entries are required.

15. Enter any additional information about the waste item(s) in the “Notes” section.

Use the bottom-portion of the screen to describe the chemical composition of the waste product. This may be a pure chemical or a mixed waste product.

16. Beside Line 1 in the “Percent” column indicate the percentage of a particular chemical in your waste product.

17. Enter the “CAS#” and “Description” or use the “Find Chem” button to search for a chemical by “CAS#” or “Description”. Select either “Starts With”, “Contains” or “Is Exactly” from the dropdown menus, depending on the information that is known.
18. Click on the “Submit” button. All items that match the information that was entered open in the screen.

19. Choose the item you want to add to the waste pickup by clicking the “Select” button at the end of the grid-line for the appropriate item. If none of the options are appropriate click the “Cancel” button and enter manually.

The item selected open in the “Waste Pickup Request” screen, as shown in the screen shot on the next page.

20. If your waste product is a pure chemical proceed by selecting the “Next” button at the bottom of the “Waste Pickup Request” screen.

If your waste item is a mixed product proceed to Line 2. In the “Pct” column indicate the percentage of the second chemical in your waste product, as described above. This table can accommodate up to 5 different chemical components.

If your waste product is composed of more than 5 different chemicals, the remainder should be added to the “Notes” sections.
21. When you have finished adding items, select the “Next” button at the bottom of the “Waste Pickup Request” screen.

The “Waste Pickup Summary” screen opens.

22. To add any additional items to the request, select the “Add Line” button to do so.

23. If you must make any changes to the initial header information that was entered, select the “Edit Header” button.

24. If, for whatever reason, the request is no longer necessary, select the “Delete Request” button to delete it.
25. When all necessary information and items have been added, select the “Place Request” button to finish the waste request.

A message will appear stating the waste pickup request has been placed, providing the waste pickup request number, as shown below.

![Waste Pickup Request](image)

26. Select “OK”. The “Waste Pickup Inquiry” utility opens, displaying the waste pickup request that was just placed. From this screen you can create a “New Request”, return to the “Home” page, “Print Request”, or “Log Out” using the appropriate buttons.

![Waste Pickup Inquiry](image)

See the next section of this manual for detailed information on the “Waste Pickup Inquiry” utility.
5.2 Waste Pickup Inquiry Utility

The “Waste Pickup Inquiry” utility allows you to view all Waste Pickup Requests that have been placed and/or received in a list, and additionally, allows you to view further details for each request. You can sort the list using various criteria that you can easily find the specific requests you are looking for.

To use the Waste Pickup Inquiry Utility:

1. From the Home Page, select the “Waste Request Inquiry” button.

The “Waste Pickup Finder” opens, listing all Waste Pickup Requests in the system.
2. If you want to sort the list of Waste Pickup Requests to find a specific request, use the filter at the top of the list.

![Waste Pickup Finder](image)

3. Enter all or part of the “Department” code or “Pickup Request Number” of the request you are looking for in the designated fields within the filter. Select either “Contains”, “Starts With”, or “Is Exactly” from the dropdown menu, depending on the information known.

4. Depending on the type of request you are looking for, select either “Placed Requests”, “Released Requests”, or “All Requests” using the radio buttons at the top of the filter.

5. When you have entered all the necessary information, select the “Search” button at the bottom of the filter. The requests in the grid refresh to display only those requests that match the entered criteria.

![Waste Pickup Finder](image)

6. View information about the requests in the grid as necessary. Each grid-line displays the request’s “Request Date”, “Placed By”, the number of items in the request or “Lines”, “Department”, “Pickup Location”, and “Status”.

7. To view further details for a specific request, click on the “PRN” (pickup request number) link on the left-side of the grid line.
The details of the request open in the “Waste Pickup Inquiry” utility, as discussed on below.

8. View information within the Waste Pickup Inquiry as necessary. The top portion lists detailed information about the request; the bottom portion displays all the waste items present on the request.

9. If necessary, use the buttons on the Waste Pickup Inquiry utility to complete additional tasks.
   a. Select the “New Request” button if you want to create a new Waste Pickup Request directly from this screen. Refer to the instructions on the Waste Pickup Request utility in section 5.1.
   b. Select the “Print Request” button to print the selected Waste Pickup Request. The Waste Pickup Request opens in an eRPortal Report Window. Select the “printer icon” from the top-left corner of the window to print the request.
   c. Select the “Home” button to the home page.
   d. Select the “Log Out” button to log out of the system.
6. Infectious Materials Inventory

The new Canadian Biosafety Standards and Guidelines, 1st edition, require an inventory of all infectious materials and toxins handled and stored in the laboratory be maintained and kept up-to-date. This includes any material stored outside the containment facility.

To maintain compliance the Lakehead University Biosafety Committee requires a qualitative inventory be maintained on eRPortal. The software can be easily adapted for this purpose. Outlined below are tips in entering new infectious items to your inventory and recording the disposal method.

Read through the instructions in Sections 1 through 5 for more information on using eRPortal to manage inventory and waste.
### 6.1 Entering New Infectious Items into your Inventory

1. Information required to complete the entry includes: Building, Room, Supplier, Catalog Number, CAS Number, Description, Quantity, Size, UM (Unit of Measure), and Grade.

#### A. Building, choose the building from the dropdown menu.

#### B. Room, choose the lab number from the dropdown menu.

#### C. Supplier, indicate the supplier here. Choose “Other” for environmental or clinical samples.

#### D. Catalog Number, insert the suppliers catalog number or use the “Find Chemical” button to search for items in the system. If a catalog number is not available you must use a placeholder.

   i. Use the “Find Chemical” button to search for a description of your item.
   
   ii. Click on the “Select” button if you find a match.
   
   iii. If none of the search results match your item you must generate a new placeholder. Placeholders will consist of the prefix “BIO” followed by 4 digits (e.g. BIO1234)
   
   iv. Use the “Find Chemical” button to search “BIO” under the description field.
   
   v. Determine a combination of 4 digits that is not currently in use.
   
   vi. Enter the new placeholder as the “Catalog Number”.

#### E. CAS Number, again enter theCatalog Number or Placeholder here.

#### F. Description, enter the name of the material or strain here.

#### G. Quantity, for a qualitative inventory enter a value of 1.

#### H. Size, for a qualitative inventory enter a value of 1.

#### I. UM (Unit of Measure), for a qualitative inventory enter “EA” (each).

#### J. Grade, indicate the Risk Group here, either RG1, RG2 or RG2+. 
It is also recommended, but not required, to include details regarding Storage group, State, PPE (Personal Protective Equipment), PPE Instructions and WHMIS codes for items new to the system.

Labs may also choose to specify where infectious material are stored in the lab utilizing the “Location 2” and “Location 3” fields, (i.e. -80 freezer, Shelf 2).

Once complete select the “Add Line” button at the bottom of the screen.

2. The received infectious material appears in the grid at the bottom of the utility.

3. New items will require you to attach a MSDS (PSDS, Pathogen Safety Data Sheet). Select the “Browse” button and upload the PSDS from your computer. See section 4.2 for more details on MSDS.
4. Items that already exist in the inventory will have an MSDS (PSDS) already attached. Under the MSDS field you will see the message “MSDS Exists, View”.

5. Enter additional items from the same supplier into the system, selecting “Add Line” each time. If you need to remove a line item select “Delete” to delete it from the list of items to be uploaded to the inventory.

6. When you are finished select the “Save” to add all line items to your inventory. A label will be generated. You may choose to print the label or create your own including the items uniquely assigned Serial Number.

7. When finished close this window and select the “Save” button again. From there you may enter a new inventory item (Add Line) or return to the home page (Home).
7. **Troubleshooting**

*Ensure you are using Internet explorer as the web browser*

*Issues viewing the content on the crystal report window in Internet explorer 11*

Go to “tools”, “compatibility view” and select “add webpage”.

For Questions or for assistance contact [labsafety@lakeheadu.ca](mailto:labsafety@lakeheadu.ca) or 343-8806