Home

For more information, please visit: https://wercs.helpdocsonline.com/home

To Check Before Launch

TO CHECK BEFORE LAUNCH

Brandings

- Header gradient

- WERCS STUDIO in title page

- UL should always be 'UL Solutions'

Check in with Pamela Senterro about promotion of new KB.

This is Phil Raimi, the Contract Tech Writer. Who created this topic?

For more information, please visit: https://wercs.helpdocsonline.com/to-check-before-launch

Platform Overview

WERCS Studio Platform overview

WERCS Studio is a modular enterprise platform developed by UL Solutions to manage chemical data, regulatory compliance, and product stewardship across global supply chains. It enables organizations to centralize hazard communication, automate SDS authoring, and ensure compliance with international regulations.

Core functions

WERCS Studio enables companies to:

Automate SDS authoring across multiple languages and jurisdictions.

Manage chemical data from raw material intake throughout the entire product lifecycle.

Ensure global regulatory compliance using integrated rule sets and data sources.

Streamline product stewardship and sustainability tracking.

Integrate with ERP and formulation systems to support scalable workflows.

Key capabilities

SDS authoring and labeling

Generates SDS documents using global templates.

Supports over 45 languages and 25,000+ safety phrases.

Compliant with GHS and other international standards.

Regulatory compliance

Accesses over 8,000 global regulatory lists via ChemADVISOR®.

Supports REACH, transportation classification, and green chemistry scoring.

Enables proactive compliance monitoring and reporting.

Product stewardship

Tracks chemical data across the supply chain.

Enforces custom chemical policies and restrictions.

Supports sustainability initiatives and transparency.

Modular architecture

Offers over 30 configurable modules including:

Administration / Security Management

Power Designer / Power Author / Power Entry

Regulatory Data Impact Analysis / Regulatory Tracking

Label Designer / Label Publisher / :Label Print Station

Report Writer / Rules Writer

GHS and Transportation Wizards

Scales with business needs and integrates with existing systems.

Reporting and analytics

Provides ad-hoc and scheduled reporting tools.

Supports regulatory impact analysis and risk assessment.

Enables document creation and distribution workflows.

Industries served

WERCS Studio supports compliance and data management for:

Industrial chemicals

Paints and coatings

Fragrances and flavors

Lubricants

Agrochemicals

Pharmaceuticals

Consumer products

Electrical and electronic equipment

Retail and more

Why It matters

WERCS Studio is considered the gold standard in chemical data management due to its:

30+ years of industry experience.

Global regulatory coverage and accuracy.

Scalable architecture and integration flexibility.

Support from UL’s network of regulatory experts.

For more information, please visit: https://wercs.helpdocsonline.com/platform-overview

How To Use This Help

Using the WERCS Studio help

This Knowledgebase provides a structured way to access documentation for WERCS Studio modules, workflows, wizards, functions, and features. It is organized into Concept , Accessing , and Task topics to support different levels of understanding and use.

To translate this site into other languages, see Translations and WERCS Studio.

Browse the help

Navigating the Knowledgebase

Search bar

Use the Search bar to locate topics by keyword. For example, enter DocuWERCS , SDS Authoring , or Transportation Wizard to find related documentation.

Topic categories

Browse by category to view:

Concept (Overview) topics — What a module, function or Wizard does.

Accessing topics — How to open or launch a module or a Wizard,

Task topics — How to perform specific actions.

Linked topics

Many Concept topics include links to related Task topics for step-by-step instructions. Task topics may also link back to Concept topics for context.

Hints, definitions, practical use, setting alerts, and exceptions

Task topics may include hints for best practices and definitions for key fields or terms. When applicable, they may appear anywhere within a topic.

Hints and tips

Hints and Tips provide additional useful information to help you navigate or use the product.

Definitions

Definitions provide explanations to help you further understand the product.

Details a practical use case for this functionality.

Practical use

Practical use cases provide further details about the practical use of the detailed functionality.

Settings alerts and warnings

These alert you that an application setting can greatly impact the detailed functionality.

Exceptions

Exceptions provide details regarding an exception you may encounter.

For more information, please visit: https://wercs.helpdocsonline.com/how-to-use-this-help

Glossary

Glossary of terms

To understand the functionality of this module, it is important to be familiar with the keywords and phrases that are often used when developing and publishing documents. The following terms are used frequently in this manual and throughout many WERCS Studio manuals: Component Refers to an ingredient that is listed in a product’s fully exploded recipe or formulation. Components may or may not have a CAS number. A component may be a regulated chemical (for example, CAS number), a raw material, a mixture, a vendor-supplied or purchased material, a substance having a pending CAS number (PMN) or none of the above. Components cannot be further broken down in WERCS Studio. Cover sheet A Product/Company-specific document that cites various product attributes configured by the user. Stored as an HTML page in a WERCS Studio database when a product is published. Format The format determines how data is input into WERCS Studio. It is the entire list of sections and subsections that may be used in any document type.

Formulation Refers to the complete output list of components and their relative weights. Additionally, WERCS Studio supports input formulation (for example, pre-blended) and indented Bill-Of-Materials (for example, process formulation).

Intermediate materials Mixtures whose individual formulations are sometimes used as inputs into other products. These mixtures are defined as products within WERCS Studio.

Product Within WERCS Studio, the term product refers to an item for which a document (for example, SDS) is defined. It usually refers to a finished good shipped to a customer, but may also be a raw material or chemical.

Product Group A collection of products and/or product aliases. Every Master product is a product group of itself. Every product can be used in multiple product groups.

Product ID A unique code determined by your company to identify a product. This can be an alpha, numeric, or alphanumeric code. The Product ID can include letters, numbers, and some special characters. For example, the user can use an underscore or a dash. Spaces are permitted, but not recommended. The Product ID is limited to 50 characters and must be unique within WERCS Studio. Once created, it cannot be edited.

Product Name Name assigned to a finished product, a sample, or raw material. It can include letters, numbers, and/or special characters. Unlike the Product ID, the Product Name does not have to be unique and spaces are permitted. The Product Name is limited to 2,000 characters. Subformat A defined subset of sections within a format. Whereas the format contains all possible sections that you may use, the Subformat only contains selected sections from the format. Any format can have any number of Subformats relating to it. The Subformat may be referred to as a document type or data view. It may also be referred to as the “output”. Text code A unique reference code assigned by WERCS Studio to a text phrase. Text phrase Textual information assigned to products or components. Text phrases may be translated into other languages (for example, “Corrosive” or “Get medical attention immediately”). Value Specific information assigned to products or components (for example, the boiling point of a product, TLV, pH, synonym name) Values are often, but not always, numeric.

For more information, please visit: https://wercs.helpdocsonline.com/glossary

Translations And Wercs Studio

Translations and WERCS Studio

GUI translations

Most WERCS Studio forms have multilingual GUI capability. Form titles and labels are displayed in the language selected from the login form (for example, American English, Japanese, German, and French). At the time of this writing, there are 15 GUI languages available for purchase. These translations are stored in an XML file distributed by UL. The user can modify the text of a particular GUI phrase translation to suit their needs (please contact your Customer Service Representative for additional information). The phrases are specifically employed within the source code of WERCS Studio. A user does not have control over where or how these phrases are used in a form.

Document translations

WERCS Studio provides the capability to produce user-designed SDS documents in over 45 languages. Within WERCS Studio, you can construct documents and templates by selecting and assigning standard phrases from the WERCS Studio phrase library. These standard phrases originate from a set of external XML files. There is an XML file for each language translation purchased from UL. When purchasing a particular set of language translations for use with WERCS Studio, the external XML files and their content constitute the fulfillment of that purchase.

Each individual language file contains thousands of phrases. These files are provided by our third-party supplier GLTAC, and are sublicensed by agreement from GLTAC to our customers. GLTAC updates these files as needed. An update may add new standard phrases and/or revise or correct existing translations. Updates to the files are part of your annual WERCS Studio maintenance fee, and are made available to our customers at no additional cost. New languages occasionally become available based on demand and available regional packets. The WERCS Studio Translation Manager enables a user to build WERCS phrase families from the standard phrases in these external XML files. Phrases selected from the files are incorporated into WERCS Studio's internal database for use in assignment to products, components and template design. Not all categories of data within WERCS Studio can be translated. Items not available for translation The following items are generally not available for translation (not an all-inclusive list):

Text data loaded from Regulatory Loaders (for example, LOLI)

Plant information (Administrator Module)

Customer names and information

Rule and rule group names and descriptions

Rule preview / results reports

Module names

Regulation names and descriptions in Regulatory Tracking

Language names

Country names

EU Wizard audit report

Change event messages

SARA GUI

VOC GUI

Font names

Model names

Database entities (column names, table names, etc.)

GHS calculation report

News feeds

Roles and users

Data ownership report

Validation report

Starter database

A starter database is delivered during the implementation of WERCS Studio software. It contains numerous phrase families which are incorporated into the included sample SDS templates (Subformats). Not every phrase contained in the starter database necessarily originated from the third-party XML files described above, and therefore may not have associated translations. The user, as part of the implementation process, should detail the needed Subformats to suit their needs. While WERCS Studio has the capability of adding custom phrases and translations, it is always best to use phrases that are included in the external files. This ensures the full translation of the Subformat.

Other considerations & disclaimers

Frequently, users load data from a regulatory source such as LOLI. It is important to understand that this process can introduce data into WERCS Studio that is often not able to be translated. WERCS Studio does not supply component name translations. These are instead supplied and maintained by a regulatory source such as LOLI. Please consult a Customer Service Representative to ensure that all mapping and masking within the Regulatory Loader is translation-neutral. There are some processes within WERCS Studio that create their own phrases. For example, the Transportation Wizard optionally creates multilingual Proper Shipping Names and Descriptions. You should review these software-created phrase translations prior to document distribution. They are not found in the external files. Some WERCS Studio modules utilize third-party software. Please contact Customer Support for further information.

For more information, please visit: https://wercs.helpdocsonline.com/translations-and-wercs-studio

About Ul

About UL Solutions

UL Solutions fosters safe living and working conditions for people everywhere through the application of science to solve safety, security and sustainability challenges. The UL Mark engenders trust enabling the safe adoption of innovative new products and technologies. Everyone at UL shares a passion to make the world a safer place. We test, inspect, audit, certify, validate, verify, advise and train, and we support these efforts with software solutions for safety and sustainability. To learn more about us, visit UL.com .|

At UL Solutions, our commitment is ongoing. We are confident that we provide comprehensive and technically sound software. WERCS Studio has been tried, tested, and used for over 40 years, holding up to stress testing by companies of all sizes, across many industries. WERCS Studio is a global software, used by customers around the world.

Product and service information and additional user manuals, are available at psi.ul.com in the Customer Service Library. Reach out to your Customer Service Representative for your credentials or use the Contact Us form for additional questions.

For more information, please visit: https://wercs.helpdocsonline.com/about-ul

Authoring

Authoring

The Authoring menu provides access to a comprehensive suite of tools for creating, managing, and analyzing product documentation and regulatory data. These options enable users to author content, manage translations, track regulatory changes, and assess the impact of data updates across systems.

Key functional areas

This menu includes the following functional areas:

Authoring – Opens the main authoring interface for creating and editing product documentation.

GTTM – Enables you to manage global templates and translation mappings for multilingual content.

Power Entry – Enables you to enter product data using structured templates designed for efficient authoring.

Power Designer, Power Author – Enables you to design and author complex product documentation using advanced authoring tools.

eLite – Enables you to access lightweight authoring tools for streamlined documentation tasks.

Wizards – Enables you to use guided workflows for authoring and data entry processes.

Translation Manager – Enables you to manage translation workflows and multilingual content across authoring platforms.

BOM – Enables you to manage Bills of Materials and related component data.

DocuWERCS – Enables you to access and manage product documentation stored in the DocuWERCS system.

Regulatory Tracking – Enables you to monitor regulatory changes and maintain compliance across product lines.

RegLoader / Browser – Enables you to load and browse regulatory data for review and analysis.

Regulatory Data Impact Analysis – Enables you to assess how regulatory data changes affect authored content and product compliance.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/authoring

Bom

Welcome to BOM

Use the BOM module to build, maintain, and generate indented product formulation structures from centralized locations. It provides clear and concise insight into product composition by enabling detailed formulation management across raw materials, intermediates, and finished goods.

With BOM, you can:

Automatically generate full component level formulations from tiers of intermediate and raw materials

Maintain formulation history

Compare product formulations

Display and manipulate product formulations down to the component level

Key functional areas

Formulation Generation – Automatically build full product formulations from nested tiers of raw and intermediate materials.

Formulation History – Track and maintain historical versions of product formulations.

Formulation Comparison – Compare multiple formulations to identify differences and changes.

Component-Level Management – View and edit product formulations at the individual component level

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

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Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/bom

Accessing Bom

Accessing the BOM Module

Module access

BOM Main form

Language selection.

Master product and its expanded list of input products and/or components.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-bom

Building A Master Product

Creating and structuring a master product formulation

Additional information about adding a product is available in the Add New Product section. Information about the auto-generation process can be found in the Autogenerate section.

Selecting a master product

To begin, select a master product using the filtering tool.

An icon appears in the Measurement Type section.

Adding input products

Once the master product is selected, add input products to build the formulation.

Viewing and managing the product tree

You can expand, collapse, and manage the product tree to view product relationships.

Orange – Components.

Blue – Finished good products and raw material products.

For more information, please visit: https://wercs.helpdocsonline.com/building-a-master-product

Viewing And Editing Product Formulations

Viewing and editing product formulations in the BOM Tree

Use the BOM Tree to view and modify product formulations directly within the master product structure. The master product displays the total percentage of the first tree-level of input products. If no input products are found, it displays the total of the component percentages.

Viewing formulation details

Selecting a child product or component displays its formulation information in the Selected Child section.

Child Unit of Measure – Displays the formulation type for the selected child. (Locked field)

Value in Immediate Parent – Shows the value of the component/product in its immediate parent.

Individual Record % of Whole – Displays the individual percentage of the component/product in the master product. (Locked field)

Component Total of Whole – Displays the percentage of a component in the master product. (Locked field)

Editing formulation values

Enter the new value in the Value in Immediate Parent field.

Click Apply .

For more information, please visit: https://wercs.helpdocsonline.com/viewing-and-editing-product-formulations

Bom Primary Menu Options

Using Primary menu options

Each of the Primary Menu options contains additional tools for building and generating product formulation structures.

For more information, please visit: https://wercs.helpdocsonline.com/bom-primary-menu-options

Manage Products

Viewing and managing product attributes

This tool provides the ability to view product attributes and additional information.

For more information, please visit: https://wercs.helpdocsonline.com/manage-products

Adding New Product

Creating a new product

Use Add Product to create a new master product.

Once you have entered a product name, click the Save and Close button to exit the dialog.

For more information, please visit: https://wercs.helpdocsonline.com/adding-new-product

Copy Product

Duplicating an existing product formulation

You can also copy product formulations.

Follow the steps in the Copy Product section in Power Author Plus .

For more information, please visit: https://wercs.helpdocsonline.com/copy-product

Product Formulation

Viewing product formulations post-autogeneration

You can also view your product’s formulation after running the autogenerate process.

Select Product Formulation from the Products menu.

For more information, please visit: https://wercs.helpdocsonline.com/product-formulation

History

Accessing product formulation history

Additional information about this dialog can be found in the Product Formulation section in the Power Author Plus manual.

For more information, please visit: https://wercs.helpdocsonline.com/history

Bom Prod Formulation Tools

Using product formulation tools

The following tools are available for generating, comparing, finding, and creating product formulation structures.

For more information, please visit: https://wercs.helpdocsonline.com/bom-prod-formulation-tools

Autogenerate

Automatically generating product formulations

Autogenerate automatically generates a master product’s formulation based on the formulation of its input products. (This also applies to any product formulation that contains the master product). The percentages are calculated by rolling up the lowest level components into the higher level products. To automatically generate product formulations:

For more information, please visit: https://wercs.helpdocsonline.com/autogenerate

Mass Update

Performing mass updates on products or components

Mass Update enables you to:

Replace a component with either another component in a product group, or all of the products in your WERCS Studio database.

Replace an input product with either another input product in a product group, or all of the products in your WERCS Studio database.

Delete a component or input product from a product group or delete all products in your WERCS Studio database.

Add a component or input product to either a product group or add all the products to your WERCS Studio database.

To perform mass updates:

If you selected to Replace a Product , click the buttons to the right of the Product fields, then use the Filtering tool to select a product.

For more information, please visit: https://wercs.helpdocsonline.com/mass-update

Compare

Comparing two product formulations

Use the Compare function to compare two product formulations.

To compare product formulations:

For more information, please visit: https://wercs.helpdocsonline.com/compare

Search By Component

Finding products by component or CAS number

Search by Component allows you to enter one or more CAS/Comp IDs and a specified percent range to display an output list of products matching the entered criteria.

To find products by component or CAS number:

For more information, please visit: https://wercs.helpdocsonline.com/search-by-component

Conglomerates

Creating conglomerate formulations for product group

The Conglomerate tool enables product lines with similar compositions to be represented by one master formulation, using the highest level concentration of every component in each product (the worst-case-scenario formulation). You can then generate a single SDS to represent an entire Product Group.

To use the Conglomerates tool:

For more information, please visit: https://wercs.helpdocsonline.com/conglomerates

Manage Reactions

Managing chemical reactions and reactive formulations

Use Mange Reactions to record existing chemical reactions and utilize the new reactive formulations to build new master formulations.

To manage chemical reactions:

Selecting OK overwrites the master formulation. Selecting Cancel from this popup does not cancel the previous action of overwriting the post-reaction model, but will not overwrite the master formulation.

For more information, please visit: https://wercs.helpdocsonline.com/manage-reactions

Options

Using BOM options

The following options are available for customizing display and archiving settings, and printing product formulations.

For more information, please visit: https://wercs.helpdocsonline.com/options

Bom Options

Customizing BOM Display and archiving settings

To customize your Bill of materials:

Show all CAS components in the formulation tree – Display the current formulation for the Master Product as well as all the formulations for the input products.

Archive before changing – Automatically archive the product's formulation before making any changes.

Show only input products – Display an input product level tree in the main screen.

For more information, please visit: https://wercs.helpdocsonline.com/bom-options

Print

Printing product formulations

To print your product formulation:

For more information, please visit: https://wercs.helpdocsonline.com/print

Docuwercs

Welcome to DocuWERCS

DocuWERCS is a tool for managing vendor-supplied documents and indexing inbound SDSs for availability on the Web Viewer. It centralizes document access and enhances regulatory reporting capabilities across global compliance frameworks.

With DocuWERCS, you can:

Index and reference all electronic vendor documents or scanned images for quick and easy access

Provide regulatory reporting against over 580 global regulations, including 170 global inventory lists

Publish summarizing cover sheets alongside vendor documents to report custom details on the product (for example, PPE symbols)

Publish both cover sheets and SDSs to internal or external Web Viewers

Key functional areas

Document Indexing – Reference scanned images and electronic vendor documents for centralized access.

Regulatory Reporting – Generate reports against over 580 global regulations, including 170 inventory lists.

Cover Sheet Publishing – Attach summarizing cover sheets to vendor documents to highlight product-specific details.

Web Viewer Integration – Publish SDSs and cover sheets to internal or external Web Viewers for broader accessibility.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

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Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/docuwercs

Accessing Docuwercs

Accessing DocuWERCS

Use DocuWERCS to manage vendor documents, associate them with products, and publish them using defined formats and Subformats.

Module access

DocWERCS Main form

The main form is divided into four functional areas:

Option Buttons – Access core tools for managing documents and product data.

Actions – Edit a selected record, print the page, or refresh the view.

Incoming Folder Location – Displays the current directory set as your incoming folder.

Option buttons

DocuWERCS provides the following options:

Product Aliases – View and edit product aliases.

Product Attributes – Edit product attributes and authorize formulation prior to publishing.

Subformat Product Attributes – Enter product-specific data for publishing Subformats.

Formulation – View and edit product formulation.

View – Open the selected vendor document.

Keywords – Assign searchable keywords to the document.

Cover – Print a cover sheet for documents associated with a product.

Publish – Select the checkbox of desired document(s), then click Publish .

Review – View and modify settings for published documents.

All Published Documents – View a filterable list of all published documents.

Administration – Admin users can configure Subformats used by DocuWERCS.

Defaults – Set default values used during publishing.

Set Incoming Folder – Select or create a new incoming folder for your user ID.

Document list column descriptions

The Document List includes the following columns:

Checkbox – Select or clear the checkbox of desired document(s) to publish. Note: Documents must be associated with a product and have authorized attributes and formulation before publishing.

Note: Documents must be associated with a product and have authorized attributes and formulation before publishing.

Note: Documents must be associated with a product and have authorized attributes and formulation before publishing.

File Name – Displays the filename and extension. If the name matches a product in the database, it is automatically associated.

Language – Indicates the language of the published cover sheet.

Product – Displays the Product ID if associated; otherwise, shows the filename without extension.

Name – Displays the Product Name once associated.

Format – Indicates the publishing Format.

Subformat – Indicates the publishing Subformat.

Issued & Expired Date – Shows the document's issue and expiration dates.

Supplier Name – Displays the vendor name that supplied the document.

Editing File Names

To rename a document:

Select the document.

Printing and Exporting Documents

To print or export the Document List:

A dialog opens, enabling you to print or export the list.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-docuwercs

Application Setup

Configuring incoming folders, defaults, and admin settings

DocuWERCS requires configuration of the Incoming Folder, Default Values, and Administration settings to support document publishing workflows.

Configuring folders and managing files

To configure your Incoming Folder:

The Folder Name Webpage Dialog opens with the My Wercs field automatically populated with your username.

The Folder Name Webpage Dialog opens with the My Wercs field automatically populated with your username.

To create a new folder: Type the folder name in the My Wercs field. Click Create folder . A confirmation pop-up appears. Click OK .

To create a new folder:

Type the folder name in the My Wercs field.

Click Create folder .

A confirmation pop-up appears. Click OK .

To select an existing folder: Click the arrow icon next to the Incoming directory. The folder directory expands. Select your desired folder to set it as your new Incoming Folder.

To select an existing folder:

Click the arrow icon next to the Incoming directory.

The folder directory expands.

Select your desired folder to set it as your new Incoming Folder.

Configuring default values

Default Values are automatically applied when publishing vendor documents or cover sheets.

To configure Default Values:

Language – Default language for published documents.

Format – Default Format for publishing.

Subformat – Default Subformat for publishing.

Issued Date – Default issue date.

Supplier – Click the Select icon to choose a supplier, or click the Create icon to add a new one.

Web availability – Set visibility to none, some, or all viewers.

Configuring administration settings

Administration settings define the Subformats used by DocuWERCS and are available only to Admin users.

To configure Administration options:

Double-click a Subformat to open the Add-Edit DocuWERCS Subformat Webpage Dialog . From this dialog, you can: Edit the Subformat description. Assign user roles. Configure additional attributes.

Double-click a Subformat to open the Add-Edit DocuWERCS Subformat Webpage Dialog . From this dialog, you can:

Edit the Subformat description.

Assign user roles.

Configure additional attributes.

After making changes, click Resync .

After making changes, click Resync .

A confirmation pop-up appears. Click OK to proceed.

A confirmation pop-up appears. Click OK to proceed.

For more information, please visit: https://wercs.helpdocsonline.com/application-setup

Processing And Publishing Documents

Uploading and assigning vendor documents

Uploading vendor documents to incoming folder

If you do not have direct access to the Incoming Folder (i.e., you cannot add or delete documents from the folder), you can upload and manage DocuWERCS files using File Manager .

To upload files:

The File Manager form opens. To navigate folders: Click the folder’s expand icon to view subfolders. The icon changes to indicate the folder is open.

The File Manager form opens. To navigate folders:

Click the folder’s expand icon to view subfolders.

The icon changes to indicate the folder is open.

To upload a file: Select the desired folder, and then click the Add New button. The Upload window opens. Click Upload file and select your file from the explorer window. A confirmation message appears once the file uploads successfully. Repeat to upload multiple files. Click Close when finished.

To upload a file:

Select the desired folder, and then click the Add New button.

The Upload window opens.

Click Upload file and select your file from the explorer window.

A confirmation message appears once the file uploads successfully.

Repeat to upload multiple files.

Click Close when finished.

Assigning a product to a vendor document

Back in DocuWERCS, you can automatically assign a product to a vendor document by matching the document filename to the Product ID (e.g., JRTEST.xls matches Product ID JRTEST).

To verify product association, check the Name column in the Document List.

Manually assigning a vendor document to an existing product

Double-click the document in the Document List.

The DocuWERCS – Edit Item Webpage Dialog opens.

Click the Select Product icon and use the Filtering tool to choose an existing product.

The remaining fields are automatically populated with any established defaults. You can override them by clicking on the associated buttons next to a field and selecting a new option.

You can override them by clicking on the associated buttons next to a field and selecting a new option.

Assigning vendor documents to new products

From the Edit Item dialog, click Create Product .

The New Product Webpage Dialog opens. Enter a Product ID manually, or: Select the Auto-increment product ID checkbox. Choose a prefix from the dropdown. Click Get next ID to generate the next available ID.

Select the Auto-increment product ID checkbox.

Choose a prefix from the dropdown.

Click Get next ID to generate the next available ID.

Click Save and Close to exit, or: Click Save , then Reset to create another product.

Click Save , then Reset to create another product.

Default values populate automatically. To override: Click the associated icons next to each field and select new options.

Click the associated icons next to each field and select new options.

For more information, please visit: https://wercs.helpdocsonline.com/processing-and-publishing-documents

Docuwercs Formulation Printing

Formulating products and publishing vendor documents

Managing a formulation

To manage formulation:

Select a document with an associated product.

Click Formulation .

Adding a component

To add a component:

Click Add New .

The Select Component Webpage Dialog opens.

Once added, the component appears in the Product Formulation section, which includes:

Remove – Remove the component from the formulation.

Sync Model – You must select this option.

CAS Number – Short string of text that refers to a chemical substance.

Component ID – Auto-assigned ID that tracks components.

Chemical Name – Name of the component.

Hazardous – Select this checkbox if the component is hazardous in any way.

Percent – Exact percentage of the component in the parent product.

Percent Range – Percent range of your component in the parent product.

Trade Secret – Select if the component is a trade secret.

Trade Secret Name – If the component is a trade secret, input the name to replace the component.

To apply the changes, click Save Formulation .

To apply the changes, click Save Formulation .

Additional features

Wrap Text – Wraps text in the formulation section (setting is remembered).

Additional Columns – Add custom columns to the formulation view.

Adding a column

To add a column:

Click Additional Columns .

The Additional Columns Webpage Dialog opens.

Click the column’s Select icon and use the Filtering tool.

To calculate values: Select the Calculate column checkbox. Enter the value in the provided field.

Select the Calculate column checkbox.

Enter the value in the provided field.

Enter a column header in the Header field (autopopulates if left blank).

Click Save .

Editing components

To edit a component:

Select the component.

Click Edit , or right-click and select Edit Component .

The Component Details Webpage Dialog opens.

Edit percentage, range, hazardous status, or trade secret settings.

Click Save .

Creating components

To create a new component:

The Create Component Webpage Dialog opens.

Enter a CAS Number and Component ID, or click Get next ID to receive the next valid Component ID.

Select options: Add to formulation now – Add the component to your current formulation. Load regulation data now – Load regulation data that is associated with your component. (Requires LOLI subscription). Load chemical name translations – Load the chemical name translations for your component. (Requires LOLI subscription).

Add to formulation now – Add the component to your current formulation.

Load regulation data now – Load regulation data that is associated with your component. (Requires LOLI subscription).

Load chemical name translations – Load the chemical name translations for your component. (Requires LOLI subscription).

If USE_COMPSECURITY is enabled, the Security Webpage Dialog opens to configure access rights by user role. This dialog enables you to specify access rights for individual user roles: Additional information about this dialog can be found in the Edit Product section of Power Author Plus , but applies at the component level.

If USE_COMPSECURITY is enabled, the Security Webpage Dialog opens to configure access rights by user role.

This dialog enables you to specify access rights for individual user roles:

Additional information about this dialog can be found in the Edit Product section of Power Author Plus , but applies at the component level.

Authorizing and revising products

You can also authorize and revise your products from the Product Formulation dialog. To authorize a product:.

A Message from webpage opens, alerting you that your product formulation is about to be marked as Authorized. Click OK .

Your authorization details appear on the Product Formulation dialog.

To unauthorize your product formulation, click Unauthorize .

You can also mark your product formulation as revised by clicking Revision :

A Message from webpage opens, alerting you that your product is going to be marked as Revised.

Subformats to print

From the Product Formulation dialog, you can also manage your print flag settings, which control if a component in the formulation displays on the selected Subformat:

The Print Flags Webpage Dialog opens, displaying all the components in your formulation and their print flag status for your current Subformat.

Archiving a product

You can also archive your products from the Product Formulation dialog.

Models

Models enable you to work with formulations that may not be identical to your final formulation. You can select to display your product's formulation as it was prior to blending, or its pre-reaction/post-reaction formulation. To manage alternate formulations:

The Model Formulations Webpage Dialog opens. To create a model:

Click Add New .

Enter a Model ID and Description.

(Optional) If you want to synchronize your new model with the master model, select the Synchronize with master model (formulation form) checkbox.

Click Save .

Select a model.

Choose a source model from the dropdown.

Click Copy From .

Additional tools

The Product Formulation dialog also contains access to additional tools and functions:

Apply Rules – Apply rules to your formulation.

EU Wizard – Open the EU Wizard.

GHS Wizard – Open the GHS Wizard.

Regulation Matrix – Open the Regulation Matrix.

Right-clicking a component provides additional options. Additional information about these options can be found in Product Formulation section in Power Author Plus .

Subformat product attributes

Click Subformat Product Attributes .

This form provides simplified data entry for your product and reflects the structure of an SDS. It provides the following elements:

Navigational Sections – Navigate to the different Sections of the document.

Status – Status of a certain Section.

Title – Title of the current Section.

Actions – Available data entry actions for a data element.

User updated – Name of the user that edited a portion of the SDS, and the time and date that the update was made.

You can edit data elements by clicking the name of the element, or the option in the Actions column.

The method you use to enter data is dictated by the Subformat and usage type of the data element.

These methods are discussed in further detail in the following sections.

PTXT

Single Phrases – Some single phrases are selected from a dropdown menu on the Select Phrase Webpage Dialog .

PVAL

Combined PTXT and PVAL

Some sections contain both PVAL and PTXT data types.

To populate these sections, Click the Add New button. The field is populated with textboxes/areas and Select options.

To enter your PTXT data, click Select .

The Dataset Attribute Edit Webpage Dialog opens. Double-click a phrase to select it.

After you have selected your PTXT options, enter your data into the PVAL textboxes/areas.

GRPH

To manage graphic-based data:

Click Save .

To upload your own image:

Click Upload . The Upload File Webpage Dialog opens

Click the Browse… button and select your file from the Explorer window.

Click Save .

Automated data entry

You can also automatically populate data. As the data is populated, you are alerted if any critical information is missing, or if any of the data is invalid. To auto-complete a page:

Click Next .

If there is no missing or invalid data, the Complete page Webpage Dialog appears and identifies missing or invalid data.

Click Close . You are redirected to the section with missing or invalid data.

Product attributes

To manage attributes and authorize a product:

The Product Attribute Form Webpage Dialog opens.

To add a new attribute:

Click the Add New button.

The Select subsection Webpage Dialog opens. Select a subsection. Selecting a PTXT or PVAL type attribute opens the Product Attribute Edit Webpage Dialog.

If you want to add a PTXT type attribute, double-click a phrase to add it to the top portion of the dialog, then click OK .

If you want to add a PVAL type attribute, click the Value tab, enter your value, then click OK.

If you select a GRPH type attribute, the Select graphic Webpage Dialog opens. Additional information about this dialog can be found in previous GRPH section.

If you select a GRPH type attribute, the Select graphic Webpage Dialog opens. Additional information about this dialog can be found in previous GRPH section.

Publish

After your product has been authorized for distribution, you can publish the document. This enables the cover sheet and vendor document to be available on your desired viewer(s). To publish a document:

Select your desired Web Availability (Authorization Value) and Revision Type from their associated dropdown menus

Select your desired Web Availability (Authorization Value) and Revision Type from their associated dropdown menus

Clearing the Do not unauthorize previous documents checkbox sets the Web Availability of any previous documents published for this product to Not Available after you publis

Clearing the Do not unauthorize previous documents checkbox sets the Web Availability of any previous documents published for this product to Not Available after you publis

After you have selected your desired options, click Yes to publish.

After you have selected your desired options, click Yes to publish.

For more information, please visit: https://wercs.helpdocsonline.com/docuwercs-formulation-printing

Additional Options

Manage aliases, keywords, covers, and published records

Use DocuWERCS tools to manage product aliases, assign searchable keywords, preview cover sheets, and review or republish published documents.

Product aliases

Additional information about this functionality can be found in the Product Aliases section of Power Author Plus .

View

Keywords

The Keywords Webpage Dialog opens.

Enter relevant keywords in the provided field.

Cover

Review

The DocuWERCS Review Webpage Dialog opens.

Select a document to display its associated data at the bottom of the dialog.

You can: Edit the Authorized Level using the dropdown. Add or delete keywords in the Keywords field.

Edit the Authorized Level using the dropdown.

Add or delete keywords in the Keywords field.

Click Update to save changes.

The top section of the dialog includes standard buttons and additional tools.

Republish

You can select a document and click the Republish button to edit the cover sheet properties and republish the document:

Select the document.

Select the document.

Click Republish . A pop-up opens with the following options: Do not unauthorize previous documents checkbox – Clearing this checkbox sets the Web Availability of any previous documents published for this product to Not Available after you publish. Web Viewer Availability – Select your desired Web availability (Authorization Value) from the associated dropdown menu. Authorized for distribution – Unselect this checkbox to unauthorize the Formula and Attributes (This prevents you from Republishing). Apply to all SubFormats – Selecting this checkbox republishes all SubFormats within the selected Format. (You are notified of any SubFormats you cannot publish due to missing required data). Cover Button – Select a Product ID and Click the Cover button to view a copy of the Cover Sheet,

Click Republish . A pop-up opens with the following options:

Do not unauthorize previous documents checkbox – Clearing this checkbox sets the Web Availability of any previous documents published for this product to Not Available after you publish.

Web Viewer Availability – Select your desired Web availability (Authorization Value) from the associated dropdown menu.

Authorized for distribution – Unselect this checkbox to unauthorize the Formula and Attributes (This prevents you from Republishing).

Apply to all SubFormats – Selecting this checkbox republishes all SubFormats within the selected Format. (You are notified of any SubFormats you cannot publish due to missing required data).

Cover Button – Select a Product ID and Click the Cover button to view a copy of the Cover Sheet,

Click Republish to finalize. The updated documents are now available in the Web Viewer.

Click Republish to finalize. The updated documents are now available in the Web Viewer.

Delete

To permanently remove a record:

Click Delete . A confirmation pop-up opens.

Select the checkbox to delete both the cover sheet and vendor document. If unselected, only the cover sheet is deleted.

Click Delete to confirm.

Dependents

Click Dependents to view all documents published for the product associated with the selected file.

The DocuWERCS Dependents Webpage Dialog opens.

All Published Documents

Click All Published Documents to access all published documents, organized into:

HTML

HTML

Archive

Archive

Internal Vendor Docs

Internal Vendor Docs

Additional details are available in the All Published Documents section of Power Author Plus .

Additional details are available in the All Published Documents section of Power Author Plus .

For more information, please visit: https://wercs.helpdocsonline.com/additional-options

Elite

Welcome to eLite

The eLite module in WERCS Studio enables streamlined product data entry using preconfigured Subformats. It guides users through question-based forms, allowing product information to be populated without requiring prior knowledge of WERCS Studio.

Using eLite, you can:

Enter product data into Subsections with no prior training or system familiarity.

Follow a linear workflow to complete the data entry process.

Customize configuration settings to control the layout and behavior of the application.

Key functional areas

This module includes the following functional areas:

Configure eLite Settings – Define layout, behavior, and display options for the eLite interface.

Create and Manage Subformats – Build and maintain the question-based forms used for product data entry.

Enter Product Data Using eLite – Populate product records by completing guided Subformat forms.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/elite

Accessing Elite

Accessing eLite eLite module access

eLite Welcome form layout

The eLite Welcome form is divided into six areas:

Administration – Access the Administration options.

Data entry page selection – Select a data entry page.

Select a task – Select a task type.

Copy product button – Copy the attributes of an existing product for use in a new product.

Task options – Specify your task type options.

Continue button – After selecting your assorted options, click this button to go to the Main form.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-elite

Elite Navigating Welcome

Navigating the eLite Welcome form

Selecting a data entry page, language and task type

Select one of the following task options: New Product New product from existing product Edit existing product Edit existing product, first overwrite data from selected product

New Product

New product from existing product

Edit existing product

Edit existing product, first overwrite data from selected product

The fields that follow in the Task options section are dependent on which selection you make:

The fields that follow in the Task options section are dependent on which selection you make:

Selecting new product

If you select New Product in the Select a task section, the following fields appear in the Task options section:

To automatically populate a Product ID, select the Auto-increment product ID checkbox. Then select an appropriate prefix from the Product ID prefix dropdown menu.

To manually enter a Product ID, clear the Auto-increment product ID checkbox and enter the ID in the Product ID textbox.

Selecting new product from existing product

When you select New product from existing product in the Select a task section, the following fields appear in the Task options section:

Click the button to the right of the Select Source Product field, then use the Filtering tool to select an existing source product.

To select a product by composition, click Search by CAS composition .

In the Find Product By Composition dialog, click Add New and use the Filtering tool to select your desired components.

Review selected components in the top section. Matching products containing all selected components appear in the bottom section.

Select a product from the Matching Product section, then click Select Product .

Editing existing product

When you select Edit existing product in the Select a task section, the following fields appear in the Task options section:

Editing existing product, first overwrite data from selected product

When you select Edit existing product, first overwrite data from selected product in the Select a task section, the following fields appear in the Task options section:

For more information, please visit: https://wercs.helpdocsonline.com/elite-navigating-welcome

Frr0X2Xe9Mu6N3Iarfx9

eLite administration options

The data entry pages of eLITE must be configured for each Subformat by an Administrator

In the Format/SubFormat Webpage Dialog , click a Format’s associated button to expand available options, then select an existing Subformat.

In the Add – Edit eLITE SubFormat Dialog, select checkboxes for additional features you want accessible to users. To restrict access, select the Subformat in ‘Read Only’ Mode checkbox. To hide the XML button, uncheck the Enable XML Button checkbox. This button is disabled by default.

To restrict access, select the Subformat in ‘Read Only’ Mode checkbox.

To hide the XML button, uncheck the Enable XML Button checkbox. This button is disabled by default.

Select a workflow from the Workflow dropdown menu to associate it with the Subformat. Products created are automatically assigned to the selected workflow.

Select user types from the Assigned menu. Hold the Ctrl key to select multiple roles.

Attributes

To run the EU Wizard automatically when the page is completed, select the Run EU Wizard checkbox.

To import this section from another product, select the Show ‘Import Page’ checkbox.

To run a rule group or stream automatically after page completion, select the Rule Stream checkbox (or leave it unchecked for a rule group), then click the button to select your desired option.

To associate a workflow task with a section, select a task from the Select a Task dropdown menu.

Usage types

Each data element is assigned a usage type based on the type of data associated with it. Data entry varies by usage type (for example, list selection or typing a value). eLITE supports the following usage types:

PRID – Not editable; hidden during data entry but appears on the final document.

PRDN – Same as PRID.

REVD – Same as PRID; also a date selector.

REVN – Same as PRID.

SUBH – Not editable; displays without editing.

CTXT, CVAL, FVAL, FTXT, REGP, REGC, FLAG, BTXT – otN editable; display or appear on SDS as noted.

DMDY – Date selector.

CMDY – Current date; not editable.

GRPH – GraIf any changes have been made to the Subformat template, specifically if new Sections or data codes have been added in Power Designer Plus, you must resync the Subformat in eLITEphic selector.

URL – Add/edit a URL in a text box.

Editing options lists

To add new values, click Edit Options.

In the SubSection Options dialog, enter the value in the Value field and the display text in the Caption field.

Use the Up and Down buttons to reorder entries.

Click Save .

Resyncing

If any changes have been made to the Subformat template, specifically if new Sections or data codes have been added in Power Designer Plus, you must resync the Subformat in eLITE

If changes have been made to the Subformat template (such as new Sections or data codes added in Power Designer Plus), click Resync .

Configuring administration settings

You can also adjust your Administration settings.

From the Subformat Administration dialog, click Settings .

In the CDE Global Settings dialog, enter the indicator for rules, the EU Wizard, or workflows in the Run indicator from page fields.

Click the Indicator color area to select a color from the palette.

Enter a label for the XML button in the Button label field.

Select an action from the Action to be performed dropdown menu.

To upload an XSLT file, click Browse , then locate the file in the Explorer window.

Click Save .

Copy product attributes

Product copy allows you to take attributes of an existing product for use in a new product.

Select a “From” product by clicking the button in the top section of the dialog.

Select a “To” product by clicking the button in the bottom section of the dialog.

Double-click a section to add it to the Sections to be included list.

Alternatively, select checkboxes next to sections, then right-click and choose which sections to add.

Select your desired copy options:

Copy product formulation – Copy the existing product’s formulation.

Quick Copy – Copy all attribute and formulation data from the existing product. This includes related documents owned by the user, but not wizard-generated documents.

Data Copy – Copy only attribute data from the existing product. This includes related documents owned by the user, but not wizard-generated documents.

Delete “To” sections data – Delete preexisting data from the “To” product before copying.

Add to archive – Add the product to the archive. This can only be undone in the Administrator module or from the Published Documents dialog.

Note: Additional information about this process can be found in All Published Documents in Power Author Plus or Archiving in Administrator .

Click Copy to complete the process.

A Message from webpag e opens, alerting you that your product copy is complete. Click Ok .

To send larger jobs to the Job Queue, click Send to job queue .

To copy aliases, click the Alias tab and follow the same steps.

For more information, please visit: https://wercs.helpdocsonline.com/frr0x2xe9mu6n3iarfx9

Elite Product Data Entry Validation

Entering and validating product data in eLite

Main form overview

The Main form provides simplified data entry for your product and reflects the structure of an SDS. It includes the following elements:

Navigational Sections – Navigate to the different Sections of the document.

Navigational Sections – Navigate to the different Sections of the document.

Status – Status of a certain data element.

Status – Status of a certain data element.

Title – Title of the current Section.

Title – Title of the current Section.

Actions – Available data entry actions for a data element.

Actions – Available data entry actions for a data element.

User updated – Name of the user that edited a portion of the SDS, and the time and date that the update was made.

User updated – Name of the user that edited a portion of the SDS, and the time and date that the update was made.

Each page allows you to enter data for a specific Section, and the pages progress in the same order the Sections appear in the Subformat.

Progress indicators

The progress for each Section appears using the following color scheme:

Grey – No data has been entered.

Yellow – Data has been entered but not validated.

Green – Data has been validated.

Edits

PTXT

Single Phrases

You can select some single phrases from a dropdown menu on the data entry page.

You can select other single phrases from the Select Phrase dialog.

Multiple Phrases

Select multiple phrases from the Edit Content dialog.

Use the Filtering field to search for a specific phrase.

Double-click a phrase to add it to the top portion of the window.

To reorder phrases, click and drag them into your desired order.

Once you have selected your phrases, click Save . The phrases display in the Main Form with updated user information.

To select a phrase outside the default phrase family, click the button.

Select a phrase from the View Phrase Family dialog.

To create a new phrase, click Add New .

In the Edit Phrase – New Phrase dialog, enter a new phrase in the Translation field, then click Save .

To edit an existing phrase, click Edit in the Edit Content dialog.

XGROUP

XGROUPs appear as a single field with an Edit link.

Clicking the link opens a multiple-phrase PTXT form.

Editing and saving data from this form refreshes the Main Form and displays the data codes as they appear on the final document.

PVAL

PVAL and PTXT combined

To populate these sections, click Add New . The area is populated with empty fields and Select options.

To enter PTXT data, click the Select link.

In the Dataset Attribute Edit dialog, follow the steps in the PTXT section.

After selecting PTXT options, enter data into the PVAL fields. Data is saved when you click Next or navigate to another section.

GRPH

Selecting a graphic-based data element opens a pop-up.

If an image has already been selected, it appears in the Current Image section.

To search for an image, use the Filter within selected folder field.

Selecting an image displays all data codes associated with it.

Select your image, then click Save .

To upload a new image, click Upload .

In the Upload File dialog, click Browse , then select your file from the explorer window.

After selecting your file, click Save .

Editing product formulations

Power Entry enables you to edit the product’s formulation. Additional information is available in the Product Formulation section of Power Author Plus.

Automated data entry

You can automatically populate data one page at a time or across all pages.

To complete a page automatically, click Next .

If no data is missing or invalid, the Complete Page dialog displays confirmation. Click Close to proceed to the next page.

If data is missing or invalid, the dialog displays an error. Click Close to return to the section with issues.

To reset the status of all pages to grey, click Reset All .

For more information, please visit: https://wercs.helpdocsonline.com/elite-product-data-entry-validation

Elite Use Tools

Using alias, group, notes, and publishing use tools

Using additional tools

The following tools are available from the Main Form:

Product Aliases – Manage aliases associated with the product.

Product Groups – Manage product groups associated with the product.

Notes – Create notes for the product.

Preview – Preview the SDS.

Publish – Publish the SDS.

Main Menu – Return to the Welcome Form.

Reset All – Reset the status of all tabs to grey.

XML – View the XML code of your document.

Reject Product – If a workflow is assigned, send an email alerting users that the product has been rejected.

Next – Automatically complete the current section.

Complete All Pages – Automatically complete all remaining pages of the SDS.

Managing product aliases

Click Product Aliases .

In the New Product Alias dialog:

Enter a description.

Clear the Auto Increment ID checkbox to select a specific Alias ID, or leave it selected, then give the alias a relevant description.

(Optional) Enter values in the Reason and Customer fields for tracking purposes and reporting purposes and do not appear in the document.

Managing alias attributes

Use the Filtering tool to select a Subsection.

Select your desired attributes and click OK .

Managing product groups

Click Product Groups .

Click Product Groups .

Use the Filtering tool to select a product.

Adding product notes

Click Notes .

In the Product Notes dialog, enter your note in the New Notes field.

Previewing the document

Click Preview .

In the Format/Subformat dialog, select a Format and Subformat.

Click the button to view available Subformats within a Format.

Select your language from the dropdown menu.

Click Preview to open the Document Preview dialog.

Rejecting a product

Click Reject Product .

In the Product Rejection dialog, enter your email subject in the Subject field.

Enter your message in the Email Body field.

Select recipients by checking the associated boxes.

Click Save to send the email.

Publishing documents

Click Publish .

In the Current Document dialog, review the selected product, Format, Subformat, and language.

Select options to suppress trade secrets or hide aliases by checking the appropriate boxes.

Plant – Select the plant for the document.

Web Availability – Choose Intranet Viewer, Internet Viewer, Both Viewers, Orders Interface, or Not Available.

Authorize Formula and Attributes – Authorize both formulation and attributes. Optionally apply to all Subformats.

Queue Instead of Publishing Immediately – Send the job to the Job Queue.

Clear RFR After Publishing – Clear Reason for Revision after publishing.

Do Not Unauthorize Previous Documents – Maintain multiple authorized versions.

Managing revision data

From the Current Document dialog, click Manage Revision Data .

In the Manage Revision Data dialog, select your desired Subformat’s checkbox.

Click Update .

When the confirmation message appears, click OK .

Publishing Tools

The Current Document dialog includes the following publishing tools:

Previewing document

Enables you to view the document prior to publishing, displaying how the document would appear with all of its current data elements.

Click the Preview icon to open the Document Preview dialog.

From this form, you can print, email, or save the document.

Viewing data ownership report

Displays all data added by users or functions.

Click the View Data Ownership Report icon to open the report dialog.

Click Print Report to print the report.

Validating document

Identifies missing phrases, translations, or required data.

Click the Validate Document icon to open the validation report.

If all required data is present, a confirmation message appears.

Publishing options

Publish in a specific format or all formats.

Select your publishing options, then

Click the icon for your desired format.

Show publisher

Opens the Document Publisher dialog.

Merge documents

Opens the Merge Documents dialog.

ES publisher

Opens the ES Publisher dialog.

List of published documents

Opens the Published Documents dialog.

Navigation tabs

Use the navigational tabs to view documents by format.

For more information, please visit: https://wercs.helpdocsonline.com/elite-use-tools

Subformat Import Export

Welcome to Subformat Import/Export

Subformat Import/Export is a tool for extracting a Subformat from one database and bringing it into a different database. It supports data portability and consistency across environments by enabling export, import, and mapping of Subformat content.

With Subformat Import/Export, you can:

Export an existing Subformat from the database

Import a Subformat from a file

Map the data codes from each Section

Key functional areas

Subformat Export – Extract Subformat definitions from the source database.

Subformat Import – Load Subformat files into a target database.

Section Mapping – Align and map data codes across Subformat sections to ensure consistency.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/subformat-import-export

Accessing Subformat Import

For more information, please visit: https://wercs.helpdocsonline.com/accessing-subformat-import

Exporting Subformats

Exporting subformats with datacodes and phrases

Use the Export Subformat option to extract an existing Subformat from the database. The export includes all datacodes and phrases associated with the selected Subformat.

To begin, follow these steps:

The Export Subformat main form opens.

The Export Subformat main form opens.

Select your desired Subformat: Click the Browse icon. The Format/Subformat Webpage Dialog opens. Select the desired Subformat from the list. The Format and Subformat codes populate the designated field.

Select your desired Subformat:

Click the Browse icon.

The Format/Subformat Webpage Dialog opens.

Select the desired Subformat from the list.

The Format and Subformat codes populate the designated field.

Click Export to begin the extraction process.The Subformat is exported to the server where WERCS Studio is installed.

Click Export to begin the extraction process.The Subformat is exported to the server where WERCS Studio is installed.

For more information, please visit: https://wercs.helpdocsonline.com/exporting-subformats

Import Subformat From File

Importing and mapping subformats from local files

Import subformat from File Main form

The main form includes several functional areas:

Tool Icons – Select a file to import, filter the list of available Subformats, refresh the view, and export the list.

Page Buttons – Navigate through multiple pages of Subformats.

List of Available Subformats – Displays Format and Subformat codes with brief descriptions.

Selecting a file to import

To begin the import process:

Click the Select File icon. The Import File Webpage Dialog opens.

The file's location and name appear in the designated field. Click Import .

Mapping the subformat

To map the imported Subformat:

The mapping form opens.

Select the Format to receive the imported Subformat using the dropdown menu.

Click Next .

Enter a Subformat Code (maximum four characters).

To overwrite an existing Subformat with the same code, select the Overwrite checkbox. If the checkbox is not selected and the code already exists, a warning message appears.

Mapping sections and subsections

The Actions column indicates mapping status:

Analyze – Section requires mapping.

Completed! – Section has been successfully mapped.

To map Subsections:

Click the Expand icon next to a Section.

Subsections appear below the expanded Section.

Subsection columns

Each Subsection includes the following columns:

Subsection – Datacode assigned to the imported Subsection.

Description – Brief description (e.g., Chemical Name, Recommended Use).

Usage – Type of datacode (e.g., PVAL, PTXT).

Mapped – Datacode the Subsection is mapped to.

Action – Options include: Add a new datacode Delete the Subsection Use the existing datacode

Add a new datacode

Delete the Subsection

Use the existing datacode

Additional options

Select or clear the Merge checkboxes to merge datacodes.

Select or clear the Use Existing checkboxes to reuse existing datacodes.

Note: Specific formatting Subsections such as SPACE and XCOMP cannot be mapped.

Note: Specific formatting Subsections such as SPACE and XCOMP cannot be mapped.

Mapping actions

Use Existing – Automatically fills in the datacode in use.

Create New – Allows entry of a new datacode.

Delete – Removes the mapping (does not delete the datacode from the Subformat).

Merge – Combines datacodes.

Rebuild – Reconstructs the phrase family.

The symbol in front of a datacode indicates the Subsection is part of a repeating dataset or table.

Possible errors

Duplicate Mapping – Mapping two different Subsections to the same datacode triggers an error and clears the textboxes.

LOLI Mappings – Reserved formatting types cannot overwrite existing LOLI mappings unless owned by WPS.

XML Error – Contact your Customer Service Representative.

Finalizing the import

Once mapping is complete:

Select one of the following: Queue – Save mappings for later processing. Complete – Finalize data codes, phrases, and links. A loading message appears during processing.

Select one of the following:

Queue – Save mappings for later processing.

Complete – Finalize data codes, phrases, and links. A loading message appears during processing.

The Action column updates to Completed!

The Action column updates to Completed!

Once all Sections are marked Completed! , click Next .

Once all Sections are marked Completed! , click Next .

If any datacodes could not be mapped, the next form displays the issue and reason.

If any datacodes could not be mapped, the next form displays the issue and reason.

After completing the import, the Subformat becomes available in PowerAuthor Plus or PowerDesigner Plus via the Welcome Dialog.

For more information, please visit: https://wercs.helpdocsonline.com/import-subformat-from-file

Import Subformat From Gcs

Importing subformat from Global Content Sync (GCS)

Import types overview

Three types of Subformats are available for import from GCS:

Reserved

Primarily for ULSC customers.

Non-ULSC customers must rely on WERCS Studio for all changes.

Requires all new datacodes.

Syncs data from WERCSmart (ULSC).

No changes allowed to formatting, datacodes, or phrases.

A notification displays when changes are available for import.

Formatting Reserved

Identified by the UL mark.

No changes allowed to formatting or Sections.

Phrase changes are permitted.

A notification displays when changes are available for import.

Sections can be reused in other Subformats, but cannot be edited.

Existing datacodes may be used and will not be overwritten.

Non-Reserved

One-time import.

No restrictions on formatting or content.

No syncing.

Select Subformat to Import from GCS Main form

The import process follows the same steps as outlined in Import and Map Subformats from Local Files .

If you are importing a Reserved or Formatting Reserved Subformat and changes have occurred, you may select the Resync option.

The Sections dialog opens, and updated Subsections become available for mapping.

For more information, please visit: https://wercs.helpdocsonline.com/import-subformat-from-gcs

Gcs

Welcome to GCS

Global Content Sync (GCS) is a suite of management tools for streamlining the exchange of information between your local database and content maintained by UL. It enables real-time access to current regional Subformats, phrases, regulatory data, and rules, helping you stay aligned with evolving global requirements.

With GCS, you can:

Quickly and easily access current regional Subformats and phrases

Increase automation via WERCS Studio defined rules

Maximize the utilization of UL expertise via real-time content delivery, allowing you to keep up to date with ever-increasing and changing regulations

Key functional areas

Content Access – Retrieve updated regional Subformats and phrases from UL’s content repository.

Rule-Based Automation – Apply WERCS Studio rules to automate content integration and updates.

Real-Time Sync – Maintain regulatory alignment through continuous content delivery and synchronization.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/gcs

Application Overview And Setup

Application overview and setup

GCS is a suite of management tools that syncs your local database with content maintained by UL, enabling you to create regionally compliant documents. Access to consistent and current content helps you stay up to date with regulation changes while eliminating manual tasks such as import/export routines, Excel file maintenance, CD updates, or scheduling time with a Customer Service Representative.

Types of data available from GCS include:

Subformats

GPS Phrase Library content (including new languages)

Regulatory & Transportation Data

Setting up GCS

To set up GCS:

Purchase a subscription through your Customer Service Representative.

Your account administrator receives an email with license keys based on your selected LOLI Subscription and purchased languages.

Updating notifications

Once GCS is set up, a scheduled Job Queue item runs, checks for updates, and displays notifications on the Studio Main form when new content is available.

To manually check for updates:

For more information, please visit: https://wercs.helpdocsonline.com/application-overview-and-setup

Subformats

Importing and syncing regional subformats via GCS

Accessing the import tool

To begin the Subformat import process:

From the Management menu, select Import/Export .

The Action column indicates the current status of each Section:

Import – Start the Subformat import process.

Continue – Resume an import already in progress.

Resync – Import completed, but updates are available.

Importing a subformat

To begin importing:

In the pop-up, select a Format from the dropdown, then click Next .

Enter a new Subformat code to preserve the existing template (recommended), or select the Overwrite checkbox to replace it. Click Next .The form updates to display newly created Sections (initially empty).

Each Section displays a status in the Action column:

Analyze – Datacode exists; manual mapping required.

To view datacodes within a Section, click the expand icon.

Mapping options for unmapped datacodes

Merge – Add imported XML phrases to the existing family.

Use Existing – Retain current mappings for imported phrases.

To remove an existing map, click the Delete link, then choose a new mapping option.

Completing the import

After mapping all items in a Section:

Click Queue to save mappings for later processing.

Click Complete to create datacodes, phrases, and links.

Once mappings are complete, the Next button appears.

Click it to send the job to the Job Queue.

The form updates to indicate the job is running.

After the job finishes:

The Subformats Available from GCS form displays RUNNING IN JP in the Action column.

For more information, please visit: https://wercs.helpdocsonline.com/subformats

Phrases 3

Syncing phrase libraries and translations using GPS

Accessing GPS phrase sync

To begin syncing phrases:

For more information, please visit: https://wercs.helpdocsonline.com/phrases-3

Phrases 3

Syncing phrase libraries and translations using GPS

Accessing GPS phrase sync

To begin syncing phrases:

For more information, please visit: https://wercs.helpdocsonline.com/phrases-3

Regulatory Data

Import updated regulatory and transportation data via GRS

Global Regulatory Sync (GRS) enables you to import updated ChemADVISOR, LOLI, and transportation data via the RegLoader / Browser . Updates follow the ChemADVISOR release schedule and are available to customers with appropriate licensing agreements.

Accessing the update tool

To begin the import process:

For more information, please visit: https://wercs.helpdocsonline.com/regulatory-data

Power Designer Author

Welcome to Power Designer, Power Author

The Power Designer and Power Author modules in WERCS Studio support the creation, formatting, and publishing of structured documents. These tools enable users to build reusable templates, generate reports, and manage datasets for dynamic content delivery.

Power Designer

Use the Power Designer module to create and manage template configurations that define how product data is presented and exported. This module enables you to design layouts, assign templates to product families, and validate output before export.

Using Power Designer, you can:

Create and manage template configurations.

Assign templates to product families.

Edit layout and formatting options.

Preview and validate template output.

Export designer configurations.

Key functional areas

The Power Designer module contains the following functional areas:

Manage Templates – Create new templates or edit existing ones to define layout and content structure.

Assign Templates – Link templates to specific product families for consistent output.

Edit Layouts – Modify visual and structural elements of templates.

Preview Output – Validate template results before final export.

Export Configurations – Save and distribute template settings.

Power Author

Use the Power Author module to define and manage authoring rules that control how product data is generated and validated. This module enables you to create rule sets, assign them to product families, and validate output before export.

Using Power Author, you can:

Create and manage authoring rules.

Assign rules to product families.

Define rule conditions and logic.

Validate authoring output.

Export authoring configurations.

Key functional areas

The Power Author module contains the following functional areas:

Create Rules – Define logic for generating product data.

Manage Rule Sets – Group related rules for easier assignment.

Assign Rules – Link rule sets to product families.

Validate Output – Preview and verify generated data.

Export Configurations – Save and distribute rule settings.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/power-designer-author

Accessing Power Designer Power Author

Accessing Power Designer and Power Author

This topic provides a brief overview of the Power Designer and Power Author modules, including how to access them and a summary of their functional areas.

Tool access

From the Authoring menu, select Power Designer or Power Author .

Note: This content covers both Power Author and Power Designer. Certain options and actions are only available in Power Designer, and access depends on user roles and permissions.

Welcome form

The Welcome form contains five areas:

Language – Select a document language.

Language – Select a document language.

Format/SubFormat – Select a format/subformat for the document. Use the smaller scroll bar to the right of the list to find a selection or use the Search field to enter a name.

Format/SubFormat – Select a format/subformat for the document. Use the smaller scroll bar to the right of the list to find a selection or use the Search field to enter a name.

Product ID – Select a task type. For more details, see Navigating the Welcome form .

Product ID – Select a task type. For more details, see Navigating the Welcome form .

Published Templates – View templates already published for an existing product/language combination.

Published Templates – View templates already published for an existing product/language combination.

Don’t show this screen again – Select this checkbox to bypass the Welcome form in future logins.

Don’t show this screen again – Select this checkbox to bypass the Welcome form in future logins.

After selecting all desired options, click Continue to proceed to the Main form. Your selections are remembered and applied the next time you access this form.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-power-designer-power-author

Navigating The Main Form Document Canvas

Navigating the Welcome form

In the Welcome form, you select a language, format/subformat and product ID before entering data into Power Designer/Power Author.

Selecting a language, format/subformat, and product ID

From the Language dropdown, select a document language. The selected language defaults to the GUI language.

In the Format/SubFormat field, select a Format/Subformat for the document. Use the smaller scroll bar to the right of the list to find a selection or use the search field to input a name.

In the Product ID field, select one of the following task options: New Product New product from existing product Edit existing product Edit existing product, first overwrite data from selected product

New Product

New product from existing product

Edit existing product

Edit existing product, first overwrite data from selected product

The fields that follow in the Task options section are dependent on which selection you make:

New Product task

If you select New Product in the Select a task section, the following fields appear in the Task options section:

To automatically populate a Product ID, select the Auto-increment product ID checkbox. Then select an appropriate prefix from the Product ID prefix dropdown menu.

New product from existing product task

When you select New product from existing product in the Select a task section, the following fields appear in the Task options section:

Click the button to the right of the Select Source Product field, then use the Filtering tool to select an existing source product.

To select a product by composition, click Search by CAS composition .

In the Find Product By Composition dialog, click Add New and use the Filtering tool to select your desired components.

Review selected components in the top section. Matching products containing all selected components appear in the bottom section.

Select a product from the Matching Product section, then click Select Product .

Edit existing product task

When you select Edit existing product in the Select a task section, the following fields appear in the Task options section:

Edit existing product, first overwrite data from selected product task

When you select Edit existing product, first overwrite data from selected product in the Select a task section . The following fields appear in the Task options section:

Bypassing the Welcome form in future logins

To bypass the Welcome form in future logins, select the Don’t show this screen again checkbox.

To bypass the Welcome form in future logins, select the Don’t show this screen again checkbox.

After selecting all desired options, click Continue to proceed to the Main form. Your selections are remembered and applied the next time you access this form.

After selecting all desired options, click Continue to proceed to the Main form. Your selections are remembered and applied the next time you access this form.

Power Designer Main Form

Sections Side Panel

Navigate to different sections of a document.

Selecting a section displays its associated subsections in the Document Canvas .

Use Ctrl to select multiple sections or select All to view all.

This panel is collapsible.

Navigational Menus

Access module menu options. Menu options vary based on user role and permissions.

Toolbars

Access various toolbar options.

Document Canvas

Enter data into a document.

Subsection Details Side Panel

When a data element on the canvas is selected, details appear here.

These are editable in Power Designer.

This panel is collapsible.

For more information, please visit: https://wercs.helpdocsonline.com/navigating-the-main-form-document-canvas

Power Designer Author Main Form

Navigating the Main form (Document Canvas)

The main form contains navigation, data entry, and document formatting options depending on whether Power Author or Power Designer is accessed. Generally, The Power Author module is focused on data entry tasks, while the Power Designer module is focused on document design and formatting tasks.

Document Canvas overview

The main form primarily consists of interactions with the document canvas. At the top left of the main form, users have the following options that impact the document canvas display:

Language — Change the language for selected Sections. The user setting POWERDESIGNERSELECTEDSECTIONS retains selected Sections when you close the module.

Language — Change the language for selected Sections. The user setting POWERDESIGNERSELECTEDSECTIONS retains selected Sections when you close the module.

Product — Change the current product displayed.

Product — Change the current product displayed.

Format/Subformat — Change the displayed Format/Subformat.

Format/Subformat — Change the displayed Format/Subformat.

Refresh — Select to refresh the document canvas.

Refresh — Select to refresh the document canvas.

Context Icons — Display when information is associated with the product.

Context Icons — Display when information is associated with the product.

Template — Select to compare multiple subformats. See Compare Subformats .

Template — Select to compare multiple subformats. See Compare Subformats .

Icon legend (top-left)

In the top middle of the document canvas, each tab (Authoring , Product , Wizards , Workflow) contains shortcuts to additional tools.

Customizing My Toolbar

My Toolbar is a customizable toolbar with up to 10 most frequently used tools.

Click Edit on My Toolbar to open the Edit Toolbar form.

Select up to ten items to display on My Toolbar.

To save changes, click Save .

For more information, please visit: https://wercs.helpdocsonline.com/power-designer-author-main-form

Assign Attributes Doc Canvas

Assigning attributes on the Document Canvas

Different types of data elements may appear on the document canvas. This section describes how to interact with different attribute types.

Assigning value (VAL)

A Value (VAL) usage type is text, numeric, or alphanumeric and is not translatable. If a PVAL (product-level) or CVAL (component-level) is selected, enter a value in the New Value field in the Edit Content form.

To update the form:

Override revision marks — Remove revision marking on the SDS for the selected subsection.

Override revision marks — Remove revision marking on the SDS for the selected subsection.

Skip Load — Exclude the subsection from regulatory data load updates. (Component-level only.)

Skip Load — Exclude the subsection from regulatory data load updates. (Component-level only.)

Click Save to save the new value. Click Clear to clear the New Value field or click Cancel button to close the pop-up form.

Click Save to save the new value. Click Clear to clear the New Value field or click Cancel button to close the pop-up form.

Assigning text attributes (TXT)

A Text (TXT) usage type is a phrase. If a PTXT (product-level) or CTXT (component-level) is selected, select a phrase from the Edit Content form.

To select a phrase from the form :

Search for phrases using the Filter field.

Double click on a phrase to add it to the subsection (top area). Click and drag phrases to reorder them, if desired.

Click Edit icon to edit the Translation field containing the selected phrase text (Edit phrase form*).

Click the Folder icon to open the View Phrase Family form. This form supports add, edit, delete, export/print, refresh and filter the phrase family. See Add a new Section for additional information about the View Phrase Family form.

If multiple phrases appear in the top section, use the dropdown menu to assign a Join by operator, if desired.

Place Holder Values – see the following section for additional information.

Assigning place holder values (.?)

To update a .? placeholder phrase, select the Place Holder Values option from the Edit form.

Enter desired text in the Text .? field.

Enter desired text in the Text .? field.

Click Add New to add a new Text .? field.

Click the Delete icon or Reset to remove a Text .? field.

Click the Select a phrase button to select an existing phrase to insert into the .? phrase.

Assigning graphic attributes (GRPH)

A Graphic (GRPH) usage type is an image. A Graphic (GRPH) usage type is an image. Double click on a graphic-based attribute to open the Graphic Editor form.

The current image displays in the Current Image section. The image’s associated details display in the Details sections.

Search for a specific image in the Filter within the selected folder field.the

Click the Upload button to upload a new graphic.

Select an image on the left then click the Plus icon on the left of Datacodes images used in section to see the list of data codes where an image is used.

Select the appropriate button to complete the indicated action.

Assigning free text attributes (FREE / FTXT)

A Free Text (FREE) usage type is a product level attribute that is not translatable. Free text attributes are designed to be product level. Data in a FTXT subsection only applies to the selected product and is not available for use in any other product. This information appears on the document. Double click on a free text-based attribute to open the Free Editor pop-up form.

Double-click a free text attribute to open Free Editor .

Enter desired text into the Notes field. The Note and Language code appear in the grid below.

Click the Add icon to input a new translation for the free text phrase.

Select the appropriate button to complete the indicated action.

For more information, please visit: https://wercs.helpdocsonline.com/assign-attributes-doc-canvas

Using The Authoring Toolbar

Using the Authoring toolbar

The Authoring toolbar contains shortcuts to certain authoring and publishing tools.

Product Formulation – Create and edit a product formulation.

Product Attributes – Manage product attributes.

Publish this document – Manage specific document publishing options.

Workflow – Assign a workflow to a product.

Contents

For more information, please visit: https://wercs.helpdocsonline.com/using-the-authoring-toolbar

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Managing product attributes (Authoring)

Adding Product Attributes

Click the Product Attributes icon to quickly add attributes to the product displayed on the document canvas.

To add product attributes:

The Product ID and Product Name of the selected product display in the top left corner of the form.

Use the toolbar in the Aliases Subsections grid to add, edit, delete, print/export component, filter product attributes.

Click the Add icon to assign a new subsection from the Select subsection form to the product.

Selecting either a PVAL or PTXT opens the Product Attribute Edit form.

From the Text tab, double-click on a phrase (PTXT) to assign it to the product.

From the Value tab, enter a value (PVAL) into the Notes: section of the form.

Click Edit icon to edit the Translation field containing the selected phrase text (Edit phrase form*).

Click the Folder icon to open the View Phrase Family form. This form supports add, edit, delete, export/print, refresh and filter the phrase family. See Section 8.1 Add a new Section

Authorization and revision – select the appropriate checkbox/es to perform the actions described:

Authorize Formula and Attributes for publishing .

Update revision date/number for this SubFormat. (The Format/Subformat is shown in the dropdown menu in the upper right corner of the Product Attribute form.)

Apply to all Aliases. (Selecting this checkbox updates the revision date/number for all aliases)

For more information, please visit: https://wercs.helpdocsonline.com/8eayydrtei0v45xnmzdz

Publishing Documents

Publishing documents

Click the Publish this document icon to publish the product that is displayed on the document canvas. The Current Document form supports a variety of publishing options.

The Current Document toolbar contains the following icons:

Preview Documents — Select the icon to open the Document Preview pop-up form to view a preview of the document.

View data ownership report — Select the icon to open the View data ownership report that displays data assigned to the product with user ID and date details for tracking purposes.

Validate document — Select the icon to open the Product Data Validation Report that displays information on missing phrases, translations, or any data that is required to complete the document.

Publish this document for standard viewing

Publish this document for web viewing

Publish this document in PDF format

Publish this product in all document types - Select a desired publication option for a specific format or all formats. Ensure that all desired publication options are selected (below) before publication.

Show publisher (See Section 4.7 Document Publisher)

Merge Documents (See Section 4.8 Merge Documents)

ES Publisher (See Section 4.10 ES Publisher)

List of published document (See Section 4.13 All Published Documents)

The Current Document form contains product information, authorization status, and publishing options.

Verify/edit the Product ID, Format, Subformat, and Language of the current document to be published.

Select the appropriate checkbox to Suppress Trade Information (Show Chemical Name) and/or Hide Alias on the document to be published.

Show publishing options - Use the corresponding drop-down menus to assign Plant , Web availability , Watermark, and Revision Type options to the document. Select one or more options:

Authorize Formula and Attributes for publishing checkbox – Authorize the product formulation and attributes. A document cannot be published unless this checkbox is selected. Click the Apply to all Subformats checkbox to authorize the product for all subformats.

Queue instead of publishing immediately (RTF, PDF, HTML only) – Send the publishing job to the Job Queue instead of publishing the job immediately.

Set the application setting COMMON > CHECKOUT_LOCKS_PRODUCTS to 1 so that the Checkout Product option appears, which treats the product as read only until it is released from the queue. To auto-select the Checkout Product Option, set the application setting PUBLISHER > DEFAULT_LOCK_ON_SUBMIT to 1.

Clear RFR after publishing checkbox – If the Reason for Revision subsection was applied to a subformat, select this option to clear the subsection after the product publication.

Do not unauthorized previous documents checkbox – Maintain multiple authorized versions of the document. If selected, both the current version and previous versions of the document are authorized. If not selected, all previously published documents are unauthorized at the web availability (Authorization Value) level.

Display revision marking since last publish (PDF only) checkbox – Highlight revisions made to this document since the last time it was published.

For more information, please visit: https://wercs.helpdocsonline.com/publishing-documents

Assigning Workflows Products

Assigning workflows to products

Assigning a Workflow

Workflows are a collection of tasks, set up at the subformat level, which are organized in a sequence to accomplish a specific process.

Click the Workflow icon to view and assign workflows to the product that is displayed on the document canvas.

Use the Associated Workflows toolbar to add, edit, delete, print/export, refresh, filter workflows.

For more information, please visit: https://wercs.helpdocsonline.com/assigning-workflows-products

Using The Product Toolbar

Using the Product toolbar

The Product toolbar contains shortcuts to the following product tools:

Add — Create a new master product. See Add Product .

Add — Create a new master product. See Add Product .

Related Documents — View and maintain related documents. See Related Documents .

Related Documents — View and maintain related documents. See Related Documents .

Product Notes — Add and view product notes. See Product Notes .

Product Notes — Add and view product notes. See Product Notes .

Document Queue — Manually process documents submitted to the job queue.

Document Queue — Manually process documents submitted to the job queue.

Product Aliases — Manage product aliases. See Product Aliases .

Product Aliases — Manage product aliases. See Product Aliases .

Aliases with Attributes — Display all aliases that contain attributes.

Aliases with Attributes — Display all aliases that contain attributes.

Content

For more information, please visit: https://wercs.helpdocsonline.com/using-the-product-toolbar

Products

Managing product records and attributes

This topic is for Power Author and Power Designer users to manage product data. The Products menu contains tools for creating, editing, copying, publishing, and organizing product records and their attributes.

Manage products – Manage products.

Add product – Create a new product.

Edit product – Edit an existing product.

Product Copy – Copy information from one or all products to another.

Product Aliases – Create and manage product aliases and groups.

Product Notes – Add and view product notes.

Document Publisher – Publish multiple products/product groups and/or their aliases across multiple subformats and languages.

Merge Documents – Create merged documents.

ES Publisher – Create exposure scenario documents.

Autogenerate – Generate a document and/or a product’s formulation based on a list of input products.

Product Groups – Manage product groups.

Related Documents – Maintain a product’s related documents.

All Published Documents – View and maintain all published documents.

Demote a product to an alias – Change the status of a product to an alias, and then select a new master product.

Check in/out – Check in/out product groups.

Accessing the Manage Product Records and Attributes form

Use this section to understand how to access the form and what areas are available once inside.

Tool access

To access the Manage Product Records and Attributes form:

Navigate to the Products menu.

Select Manage products .

Main form

The Main form includes the following functional areas:

Attributes grid : Located on the right side; displays attributes based on the dropdown selection.

Right-click options : Access additional actions such as View Published, Formulation, Notes, and Related Documents.

Creating a new product

Follow these steps to create a new product.

Select Add product from the Products menu.

Enter values in the required fields: Product ID : Enter manually or use auto-increment. Product Name Measurement Mode : Percent or Weight. Product Source : Manufactured or Purchased.

Product ID : Enter manually or use auto-increment.

Product Name

Measurement Mode : Percent or Weight.

Product Source : Manufactured or Purchased.

Click Save or Save and Close to store the product.

Optionally, right-click on the Product ID or Name fields to insert special characters.

Note: Creating a product also creates a product group with the same name and ID.

Note: Creating a product also creates a product group with the same name and ID.

Editing a product

Use the following steps to update an existing product.

Select Edit product from the Products menu.

Use the tabs to update product details: Product : Edit name (ID is not editable). Groups : Add product to a group. Security : Assign access levels (No Access, Read Only, Full Access). Workflow : Add product to a workflow. Formulation : Access the Product Formulation form. Category : Assign categories using the Select Category form.

Product : Edit name (ID is not editable).

Groups : Add product to a group.

Security : Assign access levels (No Access, Read Only, Full Access).

Workflow : Add product to a workflow.

Formulation : Access the Product Formulation form.

Category : Assign categories using the Select Category form.

Click Save to apply changes.

Product copy

Use Product Copy to duplicate attributes from one product to another.

Select Product Copy from the Products menu.

Choose a “From” Product and a “To” Product Group.

Select format and sections to include.

Choose copy options: Quick Copy Data Copy Copy product formulation Delete “To” sections data Add to archive

Quick Copy

Data Copy

Copy product formulation

Delete “To” sections data

Add to archive

Click Copy to complete the action.

Product aliases

Aliases are alternate names for a product with unique IDs.

Select Product Aliases from the Products menu.

Use the toolbar to: Add new aliases Edit or delete aliases View reassignment history Print or export alias data

Add new aliases

Edit or delete aliases

View reassignment history

Print or export alias data

Manage alias attributes using the Alias Attributes button.

Product notes

Store product-specific notes.

Select Product Notes from the Products menu.

Enter a note and click Save .

Products with notes display a “Product has Notes” icon in grids.

Document publisher

Publish multiple products or groups across formats and languages.

Select Document Publisher from the Products menu.

Assign product groups and select subformat/language combinations.

Choose publishing options: Display revision markings Suppress trade secrets Hide aliases Clear RFR Maintain multiple authorized versions

Display revision markings

Suppress trade secrets

Hide aliases

Clear RFR

Maintain multiple authorized versions

Click Publish or Queue Documents to complete.

Merge documents

Create merged documents using product groups.

Select Merge Documents from the Products menu.

Load product group members and select languages.

Choose publishing options.

Click Publish or Queue Documents .

Autogenerate

Generate documents using input products.

Select Autogenerate from the Products menu.

Add input products and assign percentages.

Choose autogenerate options: Formulation Phrases Formulation and Phrases

Formulation

Phrases

Formulation and Phrases

Select phrase and rule options.

Click Run now to complete.

ES publisher

Create exposure scenario documents using aliases.

Select ES Publisher from the Products menu.

Search by alias or group.

Select products, languages, and publishing options.

Click Publish to complete.

Product groups

Organize products into groups for batch operations.

Select Product Groups from the Products menu.

Use the toolbar to manage groups and add products.

Right-click for options: Group Authorization Product Group Wizard Check in/out

Group Authorization

Product Group Wizard

Check in/out

Product group wizard

Add multiple products to a group using filters.

Use filter tabs to search by formulation, alias, PTXT/PVAL, or customer.

Build candidate list and select actions.

Apply authorization and revision options.

Related documents

Associate internal documents with products.

Select Related Documents from the Products menu.

Use the toolbar to manage documents.

Upload files, assign types, suppliers, and comments.

Save to associate documents with the product.

If using DocuWERCS, manage vendor documents from the Internal Vendor Docs tab.

If using DocuWERCS, manage vendor documents from the Internal Vendor Docs tab.

All published documents

View and manage previously published documents.

Select All Published Documents from the Products menu.

Use tabs to view by format.

Use options to: Archive Hide unauthorized documents View custom fields Change multiple documents

Archive

Hide unauthorized documents

View custom fields

Change multiple documents

Demote a product to an alias

Convert a product to an alias and assign a new master.

Select Demote a product to an alias from the Products menu.

Choose the product and new master.

Optionally delete the demoted product’s data.

Click Demote selected product .

■■ This action is permanent unless archived or restored from backup.

■■ This action is permanent unless archived or restored from backup.

Check in/out

Manage publication authorization by checking product groups in or out.

Select Check in/out from the Products menu.

Choose a product group and user.

Click Check IN or Check OUT .

View status confirmation.

Original Content - Manage Product Records and Attributes

This section is for Power Author and Power Designer users to manage product data. The Products menu contains the following tools:

Add product – Create a new product.

Add product – Create a new product.

Edit product – Edit an existing product.

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Product Copy – Copy information from one or all products to another.

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Product Notes – Add and view product notes.

Product Notes – Add and view product notes.

Document Publisher – Publish multiple products/product groups and/or their aliases across multiple subformats and languages.

Document Publisher – Publish multiple products/product groups and/or their aliases across multiple subformats and languages.

Merge Documents – Create merged documents.

Merge Documents – Create merged documents.

ES Publisher – Create exposure scenario documents.

ES Publisher – Create exposure scenario documents.

Autogenerate – Generate a document and/or a product’s formulation based on a list of input products.

Autogenerate – Generate a document and/or a product’s formulation based on a list of input products.

Product Groups – Manage product groups.

Product Groups – Manage product groups.

Related Documents – Maintain a product’s related documents.

Related Documents – Maintain a product’s related documents.

All Published Documents – View and maintain all published documents.

All Published Documents – View and maintain all published documents.

Demote a product to an alias – Change the status of a product to an alias, and then select a new master product.

Demote a product to an alias – Change the status of a product to an alias, and then select a new master product.

Check in/out – Check in/out product groups.

Check in/out – Check in/out product groups.

This option is only available if the application setting: COMMON > USE_GLOBAL_ENTITY is set to 1.

Manage products

Manage products

Select the Manage products option to open the Manage products form.

The Products grid displays existing products in the database. Select a product row to view attributes associated with the selected product. The grid on the right side of the form displays linked product attributes.

Additional information about product options can be found in the following sections:

View Published – Section 4.13 All Published Documents

View Published – Section 4.13 All Published Documents

Options – Section 4.7 Document Publisher

Options – Section 4.7 Document Publisher

Formulation – Section 2.3.1 Product Formulation

Formulation – Section 2.3.1 Product Formulation

Attributes – Section Product Attributes

Attributes – Section Product Attributes

Notes – Section 4.6 Product Notes

Notes – Section 4.6 Product Notes

Related Documents – Section 4.12 Related Documents

Related Documents – Section 4.12 Related Documents

The dropdown menu located above the grid switches the right side grid to display various attributes.

Add product

Add product

Select the Add product option to open the New Product form.

Product ID* – Enter a Product ID manually in the field.

Product ID* – Enter a Product ID manually in the field.

Auto-increment product ID – Select the checkbox to automatically assign the next ID. Use the Prefix dropdown to select a Product ID prefix.

Auto-increment product ID – Select the checkbox to automatically assign the next ID. Use the Prefix dropdown to select a Product ID prefix.

Click the Get next ID button. The next available ID is populated in the Product ID field.

Click the Get next ID button. The next available ID is populated in the Product ID field.

Product Name* -- Enter a Product Name in the field.

Product Name* -- Enter a Product Name in the field.

Measurement Mode – Select to input product formulation as Percent or Weight. The default is Percent.

Measurement Mode – Select to input product formulation as Percent or Weight. The default is Percent.

Product Source – Select is the product is Manufactured or Purchased. The default is Manufactured.

Click the Save and Close button to exit the New Product pop-up form. Click the Save button to save the current product without exiting the form. Click the Reset button to clear all inputs on the form.

Click the Save and Close button to exit the New Product pop-up form. Click the Save button to save the current product without exiting the form. Click the Reset button to clear all inputs on the form.

* Right click on the Product ID or Product Name field to add certain special characters:

Note: When a new product is created, a product group with the same product name and ID is also created.

Edit product

Edit product

Select the Edit product option to open the Edit Product form.

4.3.1 Product

The form defaults to the Product tab. Edit the Product Name then click the Save button to save changes. The Product ID is not editable.

4.3.2 Groups

Select the Groups tab to add a product to a group. Select the Search icon to select a group from the Select group pop-up form. Click the Save button to save changes.

4.3.3 Security

Select the Security tab to assign security to a specific product. Use the radio buttons to assign access for each Role.

• No Access – The role has no visibility to product and cannot search, view, or select it. These restrictions extend to any product/aliases, product aliases within product groups, and certain product groups where all products contain one or more no access components.

• Full Access – The role has full visibility and use of the product, as well as aliases and product

groups containing the product. Administrators automatically have full access rights.

• Read Only – The role can view the product, as well as product aliases and product groups

containing the product, but they cannot edit any product data.

Click the Save button to save changes. A pop-up message confirming security rights were updated appears. Click OK button to close it.

4.3.4 Workflow

Select the Workflow tab to add a product to a pre-defined workflow. Select the checkbox associated to the desired workflow. Click the Save button to add the product to the selected workflow.

4.3.5 Formulation

Select the Formulation tab to open the Product Formation form. See Section 2.3.1 Product Formulation for additional information.

4.3.6 Category

Select the Category tab, then click the Search icon to open the Select Category form.

Use the toolbar to add, edit, delete, refresh, export product categories.

Click the Select button to apply the selected category to the product.

Product Copy

Product Copy

Product copy takes attributes of an existing product for use in a new product. Product copy functionality includes the following:

product phrases and values

product phrases and values

free text

free text

repeating dataset phrases and values

repeating dataset phrases and values

related documents

related documents

formulation

formulation

print flags

print flags

subformat ranges

subformat ranges

models

models

input products

input products

regulation bypasses

regulation bypasses

formulation phrases and values

formulation phrases and values

regulation data

regulation data

regulation compliance data

regulation compliance data

Select the Product Copy option from the Products menu to open the Product Copy form. This form also supports alias copy. Select the Alias Copy tab and follow the steps below.

“From” Product - Click the Search icon and use the Select product form to choose a “From” Product.

“From” Product - Click the Search icon and use the Select product form to choose a “From” Product.

Format – Select a format from the dropdown menu.

Format – Select a format from the dropdown menu.

Sections grid - Double click on a Section to add it to the Sections to be included OR select a Section checkbox then right click in the grid to Move all selected on page or Move currently selected.

Sections grid - Double click on a Section to add it to the Sections to be included OR select a Section checkbox then right click in the grid to Move all selected on page or Move currently selected.

“To” Product Group - Click the Search icon and use the Select group form to choose a “To” Product Group.

“To” Product Group - Click the Search icon and use the Select group form to choose a “To” Product Group.

Format – Select a format from the dropdown menu.

Format – Select a format from the dropdown menu.

Copy options – Select desired product copy options.

Copy options – Select desired product copy options.

Copy product formulation – Copy the existing product’s formulation.

Copy product formulation – Copy the existing product’s formulation.

Quick Copy – Copy all attribute and formulation data from the existing product. This copies related documents owned by the user, not related documents from wizards.

Quick Copy – Copy all attribute and formulation data from the existing product. This copies related documents owned by the user, not related documents from wizards.

Data Copy – Copy only attribute data from the existing product. This copies related documents owned by the user, not related documents from wizards.

Data Copy – Copy only attribute data from the existing product. This copies related documents owned by the user, not related documents from wizards.

Delete “To” sections data – Preexisting data in the “To” product is deleted prior to copying data from the “From” product.

Delete “To” sections data – Preexisting data in the “To” product is deleted prior to copying data from the “From” product.

Add to archive – Add the product to the archive. This process can only be undone in the

Add to archive – Add the product to the archive. This process can only be undone in the

Administrator module or from the Published Documents form. Additional information may be found in the Administrator module reference.

Select the Send to job queue button to send larger jobs to the Job Queue.

Select the Send to job queue button to send larger jobs to the Job Queue.

Click the Copy button to complete the Product Copy action. A pop-up message confirming Finished Product Copy appears. Click OK button to close it.

Click the Copy button to complete the Product Copy action. A pop-up message confirming Finished Product Copy appears. Click OK button to close it.

Product Aliases

Product Aliases

Product Alias is an alternate name for a product in WERCS Studio. An Alias is identical to the master product, but it has a unique Alias Name and Alias ID. A product can have multiple aliases; aliases can be added to product groups.

Select the Product Aliases option from the Products menu to open the Product Aliases form.

Click the Find Alias button to search for a specific alias using the filter functionality on the Find Alias form.

Click the Find Alias button to search for a specific alias using the filter functionality on the Find Alias form.

Select a product from the Products grid (left side) to see all of the product aliases displayed in the Product Aliases grid (right side).

Select a product from the Products grid (left side) to see all of the product aliases displayed in the Product Aliases grid (right side).

Click the Alias Attributes button to manage alias attributes. See Section 4.5.1 Alias attributes for additional information.

Click the Alias Attributes button to manage alias attributes. See Section 4.5.1 Alias attributes for additional information.

Click the Reassignment History button to view the selected alias’s reassignment history. The Reassignment History pop-up form opens and displays alias reassignment details.

Click the Reassignment History button to view the selected alias’s reassignment history. The Reassignment History pop-up form opens and displays alias reassignment details.

Product Aliases toolbar – the toolbar contains icons to perform various alias-related actions.

Product Aliases toolbar – the toolbar contains icons to perform various alias-related actions.

Add New – Click the icon to open the New Product Alias pop-up form.

Add New – Click the icon to open the New Product Alias pop-up form.

Confirm the Alias ID. Deselect the Auto Increment ID checkbox* to edit the Alias ID, if desired.

Only alphanumeric and the following characters are allowed: .-:,|/_$

Enter a description in the Description field.

Reason and Customer are optional fields used primarily for tracking and reporting purposes and do not appear in the document.

Click the Save button the create the new alias. Click the Cancel button to cancel the action.

*Set application setting ALIASIDGEN > USEAUTOALIASID to TRUE to activate autoincrement functionality for aliases.

*Set application setting ALIASIDGEN > AUTOINCREMENTON to TRUE to select the Auto Increment checkbox by default.

Edit Selected icon – Select an alias from the Product Aliases grid and click the icon to edit certain aliases information: Description, Reason, Customer fields.

Edit Selected icon – Select an alias from the Product Aliases grid and click the icon to edit certain aliases information: Description, Reason, Customer fields.

Delete Selected icon -- Select an alias from the Product Aliases grid and click the icon to delete the alias.

Delete Selected icon -- Select an alias from the Product Aliases grid and click the icon to delete the alias.

Print View icon – Select the icon to open the Print View pop-up form to print or export Product Aliases grid.

Print View icon – Select the icon to open the Print View pop-up form to print or export Product Aliases grid.

Refresh icon – Select the icon to refresh the grid.

Refresh icon – Select the icon to refresh the grid.

Filter icon – Select the icon to filter on certain criteria.

Filter icon – Select the icon to filter on certain criteria.

4.5.1 Alias attributes

Alias attributes is data associated with a specific alias (PTXT, PVAL, GRPH). Click the Alias Attributes button to open the Manage alias attributes form.

Format – The Format section displays publication information. Change the format by selecting a different option from the Format dropdown.

Format – The Format section displays publication information. Change the format by selecting a different option from the Format dropdown.

Authorization & revision

Authorization & revision

Authorize Formula and Attributes for publishing checkbox-- Authorize the product formulation and attributes. A document cannot be published unless this checkbox is selected.

Update revision date/number for this SubFormat checkbox – Select the checkbox to update the revision date and revision number for the Alias

Apply to all Aliases checkbox – Select the checkbox to apply Authorization & revision changes to all Aliases.

Alias Attributes toolbar

Alias Attributes toolbar

Add icon -- Select the icon to open the Select subsection pop-up form to add a new Alias attribute. Select a subsection to open the Product Attributes pop-up form. This form is described in Section 2.3.2 Product Attributes.

Add icon -- Select the icon to open the Select subsection pop-up form to add a new Alias attribute. Select a subsection to open the Product Attributes pop-up form. This form is described in Section 2.3.2 Product Attributes.

Edit icon -- Select an attribute from the Aliases Subsections from the grid. Select the icon to open the Product Attributes pop-up form. This form is described in Section 2.3.2 Product Attributes.

Edit icon -- Select an attribute from the Aliases Subsections from the grid. Select the icon to open the Product Attributes pop-up form. This form is described in Section 2.3.2 Product Attributes.

Delete icon -- Select an attribute from the Aliases Subsections from the grid and click the icon to delete the attribute.

Delete icon -- Select an attribute from the Aliases Subsections from the grid and click the icon to delete the attribute.

Print View icon – Select the icon to open the Print View pop-up form to print or export Aliases Subsections grid.

Print View icon – Select the icon to open the Print View pop-up form to print or export Aliases Subsections grid.

Filter icon – Select the icon to filter on certain criteria.

Filter icon – Select the icon to filter on certain criteria.

Product Notes

Product Notes

Product Notes functionality stores product-specific information. Select the Product Notes option from the Products menu to open the Notes form.

Input a product note in the New Note field and click the Save button to save changes. Click the Close button to close the pop-up form.

Now the “Product has Notes” icon appears next to the product containing at least one note in most Products grids across the module.

Document Publisher

Document Publisher

Document Publisher functionality supports the publication of multiple products/product groups across many subformats and languages.

Select the Document Publisher option from the Products menu to open the Publish products form.

In the top section of the form, assign product groups for publication by selecting a product group from the Product Groups grid and use the navigation arrows to move selections to the Selected Groups area. (Double-clicking on selected product groups also moves them between Product Groups grid and Selected Groups area.)

In the top section of the form, assign product groups for publication by selecting a product group from the Product Groups grid and use the navigation arrows to move selections to the Selected Groups area. (Double-clicking on selected product groups also moves them between Product Groups grid and Selected Groups area.)

In the Options section of the form, select a Format from the Format dropdown menu.

In the Options section of the form, select a Format from the Format dropdown menu.

From the grid, select desired subformat/language combinations by clicking the appropriate checkboxes.

From the grid, select desired subformat/language combinations by clicking the appropriate checkboxes.

Select the Save settings on exit checkbox to use the same subformat/language in future publications

Select the Save settings on exit checkbox to use the same subformat/language in future publications

Use the Search icon to select a Plant. Use the corresponding drop-down menus to assign Web availability, Revision Type, and Watermark options.

Use the Search icon to select a Plant. Use the corresponding drop-down menus to assign Web availability, Revision Type, and Watermark options.

Click the Next button to continue document publication. Click the Cancel button to close the Publish products form.

Click the Next button to continue document publication. Click the Cancel button to close the Publish products form.

The next Publish products form contains the following options:

Selection Mode – select from the following options

Selection Mode – select from the following options

Group Level Products – Products that are direct members of the Product Group.

Group Level Products – Products that are direct members of the Product Group.

Group Level Aliases – Aliases that are direct members of the Product Group.

Group Level Aliases – Aliases that are direct members of the Product Group.

Aliases of Group Products – Aliases of the Group Products that might not be direct members of the group.

Aliases of Group Products – Aliases of the Group Products that might not be direct members of the group.

Choose products & aliases individually* – Allows individual selection of Aliases.

Choose products & aliases individually* – Allows individual selection of Aliases.

*If individually selecting products and aliases, click Plus button to expand a product group, then select desired product and/or alias.

Publishing options – select desired publication options

Publishing options – select desired publication options

Display revision marking since last publish (PDF only) – Highlight revisions made to this document since the last time it was published.

Display revision marking since last publish (PDF only) – Highlight revisions made to this document since the last time it was published.

Generate (RTF files, HTML files, PDF files) – Select your desired document type(s).

Generate (RTF files, HTML files, PDF files) – Select your desired document type(s).

Options – select additional publication options

Options – select additional publication options

Suppress Trade Secret Information (Show Chemical Name) – Prevent trade secret information from being printed on the SDS.

Suppress Trade Secret Information (Show Chemical Name) – Prevent trade secret information from being printed on the SDS.

Hide Alias – Hide all aliases on the SDS.

Hide Alias – Hide all aliases on the SDS.

Clear RFR after publishing – If the Reason for Revision subsection was applied to a subformat, select this option to clear the subsection after the product publication.

Clear RFR after publishing – If the Reason for Revision subsection was applied to a subformat, select this option to clear the subsection after the product publication.

Do not unauthorized previous documents – Maintain multiple authorized versions of the document. If selected, both the current version and previous versions of the document are authorized. If not selected, all previously published documents are unauthorized at the web availability (Authorization Value) level.

Do not unauthorized previous documents – Maintain multiple authorized versions of the document. If selected, both the current version and previous versions of the document are authorized. If not selected, all previously published documents are unauthorized at the web availability (Authorization Value) level.

Preview subformats & languages – this section displays all subformat/language combinations scheduled for publication. To edit this list, use the Previous button (12) to go back.

Preview subformats & languages – this section displays all subformat/language combinations scheduled for publication. To edit this list, use the Previous button (12) to go back.

Bottom row buttons – select from the following options

Bottom row buttons – select from the following options

Previous – Click this button to go back to the previous form.

Cancel – Click this button close the Publish products form.

Queue Documents – Click this button to send documents to the job queue. A confirmation form appears to display queue result.

Publish – Click this button to publish documents with the options selected.

Publish Preview – Click this button to preview a list of documents set to publish to verify that all required data is present for each document.

Click on an icon in the Validation column to view the Product Data Validation Report.

Click on an icon in the Validation column to view the Product Data Validation Report.

Click the Authorize Formula and Attributes for publishing button to authorize the formula and product attributes for publishing.

Click the Authorize Formula and Attributes for publishing button to authorize the formula and product attributes for publishing.

Bottom row buttons – select the corresponding button to go back, cancel, queue documents or publish documents.

Bottom row buttons – select the corresponding button to go back, cancel, queue documents or publish documents.

Merge Documents

Merge Documents

Merge Documents functionality supports the creation of exposure scenarios, using product groups to keep each of the exposure products as individual products within the database.

Select the Merge Documents option from the Products menu to open the Merge Documents form.

Click the checkbox to select a product group.

Click the checkbox to select a product group.

Click the Load Product Group Members button to display a list of products to be published in this product group. Select languages to apply to the document.

Click the Load Product Group Members button to display a list of products to be published in this product group. Select languages to apply to the document.

Select desired publishing options. See Section 4.7 Document Publisher for more information.

Select desired publishing options. See Section 4.7 Document Publisher for more information.

Queue Documents – Click this button to send documents to the job queue. A confirmation form appears to display queue result.

Queue Documents – Click this button to send documents to the job queue. A confirmation form appears to display queue result.

Publish – Click this button to publish documents with the options selected. A pop-up message appears with details on whether the publication was successful.

Close – Click this button close the Merge Documents form.

Autogenerate

Autogenerate

Autogenerate supports document generation for a list of input products. The input products must all be defined at the product level. This functionality may be useful for blended products.

Select the Autogenerate option from the Products menu to open the Autogenerate form.

Use the toolbar to add, edit, delete, print/export, refresh the input products list.

Use the toolbar to add, edit, delete, print/export, refresh the input products list.

Select the Add icon to open both Insert Product and Select product forms. Select a product from the Select product form. Now the Insert Product form contains the selected input product's formulation.

Select the Add icon to open both Insert Product and Select product forms. Select a product from the Select product form. Now the Insert Product form contains the selected input product's formulation.

Enter the percentage of the input product.

Enter the percentage of the input product.

Enter relevant comments.

Enter relevant comments.

Select a Model from the dropdown menu.

Select a Model from the dropdown menu.

Click the OK button to add the input product. A pop-up message appears with details on whether the addition was successful.

Select an Autogenerate Option:

Select an Autogenerate Option:

Formulation – Blend selected input product/s formulation/s into the master formulation.

Formulation – Blend selected input product/s formulation/s into the master formulation.

Phrases – Blend phrases from input products into the master product.

Phrases – Blend phrases from input products into the master product.

Formulation and Phrases – Blend input product formulations and phrases with the master formulation.

Formulation and Phrases – Blend input product formulations and phrases with the master formulation.

Phrase Options – Select phrase options if using Phrases or Formulation and Phrases autogenerate option.

Phrase Options – Select phrase options if using Phrases or Formulation and Phrases autogenerate option.

All Unique – Only phrases that appear once across all input products is brought into the master product.

Highest Severity – Only phrases with highest severity is brought into the master product. (Phrase severity is managed by end user.)

Highest Input Product Percent – Only the phrase from the input product with the highest

percentage is brought into the master product.

Ignore phrases for components below threshold checkbox – Select to ignore phrases from components that fall below the threshold defined in the Threshold field.

Ignore phrases for components below threshold checkbox – Select to ignore phrases from components that fall below the threshold defined in the Threshold field.

Use phrases from promoted products only checkbox – Select to only use the phrases from an input product that were created from a promoted product. See Section 5.1 Manage Components for additional information.

Use phrases from promoted products only checkbox – Select to only use the phrases from an input product that were created from a promoted product. See Section 5.1 Manage Components for additional information.

Rule Options – Select the Run rule group after autogenerate checkbox to choose a rule group or rule stream to run after autogenerate.

Rule Options – Select the Run rule group after autogenerate checkbox to choose a rule group or rule stream to run after autogenerate.

Sections grid – Select the sections to include in the autogenerate.

Sections grid – Select the sections to include in the autogenerate.

Sections to be excluded – Select sections to exclude from autogenerate process using appropriate checkbox. Right click in the Sections grid and select to move all selected on page or to move currently selected items to the Sections to be excluded.

Sections to be excluded – Select sections to exclude from autogenerate process using appropriate checkbox. Right click in the Sections grid and select to move all selected on page or to move currently selected items to the Sections to be excluded.

Authorize MSDS checkbox – Select to authorize the SDS.

Authorize MSDS checkbox – Select to authorize the SDS.

View MSDS when finished – Select to view the SDS when the autogenerate is finished.

Click the Run now button to complete the autogenerate action with the options selected. A pop-up message appears with details on whether the autogenerate was successful.

ES Publisher

ES Publisher

ES Publisher uses alias products to create exposure scenario documents.

Select the ES Publisher option from the Products menu to open the ES Publisher form.

Select to search for a product by its alias or its group.

Select to search for a product by its alias or its group.

Select the Filter icon in the grid to search for an alias or a group.

Select the Filter icon in the grid to search for an alias or a group.

If Groups option was selected, use the Plus icon next to the desired group to open the list of products in the group. Select products to include in the exposure scenario.

If Groups option was selected, use the Plus icon next to the desired group to open the list of products in the group. Select products to include in the exposure scenario.

Select desired Language and SubFormats.

Select desired Language and SubFormats.

Select desired publishing options:

Select desired publishing options:

Publish all product aliases – Publish all of the product’s aliases.

Publish all product aliases – Publish all of the product’s aliases.

Clear RFR after publishing – If the Reason for Revision subsection was applied to a subformat, select this option to clear the subsection after the product publication.

Clear RFR after publishing – If the Reason for Revision subsection was applied to a subformat, select this option to clear the subsection after the product publication.

Display revision marking since last publish (PDF only) – Highlight revisions made to this document since the last time it was published.

Display revision marking since last publish (PDF only) – Highlight revisions made to this document since the last time it was published.

Do not unauthorized previous documents – Maintain multiple authorized versions of the document. If selected, both the current version and previous versions of the document are authorized. If not selected, all previously published documents are unauthorized at the web availability (Authorization Value) level.

Do not unauthorized previous documents – Maintain multiple authorized versions of the document. If selected, both the current version and previous versions of the document are authorized. If not selected, all previously published documents are unauthorized at the web availability (Authorization Value) level.

Save Settings on publish – Save publish settings.

Save Settings on publish – Save publish settings.

Use the corresponding drop-down menus to assign Web availability, Revision Type, and Watermark options.

Use the corresponding drop-down menus to assign Web availability, Revision Type, and Watermark options.

Click the Publish button to publish the ES document with selected options.

Product Groups

Product Groups

A Product Group is a user-defined collection of products that are linked together for the purpose of performing operations to multiple products at the same time, such as publishing or applying rules. A single product can belong to many product groups.

Select the Product Groups from the Products menu to open the Product Groups form.

Use the toolbar in the Product Groups section to add, edit, delete, filter, refresh, and export the product groups list.

Use the toolbar in the Product Groups section to add, edit, delete, filter, refresh, and export the product groups list.

Select the Add icon to open New Product Group form. Input a code and description for the new product group. Select the Group has alternates checkbox, if appropriate.

Select the Add icon to open New Product Group form. Input a code and description for the new product group. Select the Group has alternates checkbox, if appropriate.

Use the toolbar in the Products section to add, delete, filter, refresh, and export the product groups list.

Use the toolbar in the Products section to add, delete, filter, refresh, and export the product groups list.

Select the Add icon to open Add new product form. Select a product from the form to add it to the selected product group.

Select the Add icon to open Add new product form. Select a product from the form to add it to the selected product group.

Right click on product group to display the following options:

Right click on product group to display the following options:

Group Authorization – Select to update the Authorization level for all products in the group. Use the Group Authorization pop-up form to select a product group, Format, and Subformat. Click Authorize or Unauthorize button to execute the action.

Group Authorization – Select to update the Authorization level for all products in the group. Use the Group Authorization pop-up form to select a product group, Format, and Subformat. Click Authorize or Unauthorize button to execute the action.

Product Group Wizard – See Section 4.11.1 Product Group Wizard.

Product Group Wizard – See Section 4.11.1 Product Group Wizard.

Check in/out – See Section 4.15 Check in/out.

Check in/out – See Section 4.15 Check in/out.

Product Group Wizard

Product Group Wizard

The Product Group Wizard supports the addition of multiple products to a group at the same time. Use the Product Group Wizard form to search for products by formulation, Alias ID/name, PTXT/PVAL, and Customer.

Use the Filter tabs (Formulation, ID & Name, Product/Alias Data, Customer) to search for products to add to a product group. A variety of filter criteria are available: CAS, Product or Component ID, Product or Chemical Name, Percent, Text, and Value codes (PTXT, PVAL) and Customer Name or Customer ID.

Use the Filter tabs (Formulation, ID & Name, Product/Alias Data, Customer) to search for products to add to a product group. A variety of filter criteria are available: CAS, Product or Component ID, Product or Chemical Name, Percent, Text, and Value codes (PTXT, PVAL) and Customer Name or Customer ID.

Click the Search button to search based on selected criteria. Click the Search only in candidates checkbox to limit search results to groups in the Candidate Group Members section.

Click the Search button to search based on selected criteria. Click the Search only in candidates checkbox to limit search results to groups in the Candidate Group Members section.

Search results populate in Products/Aliases matching selected criteria section. Use the navigation arrows to build a Candidate Group Members list.

Search results populate in Products/Aliases matching selected criteria section. Use the navigation arrows to build a Candidate Group Members list.

Click the Clear button to remove all the Candidate Group Members items, without adding them to the Products/Aliases matching selected criteria field. This is useful for applying multiple filters.

Select an action from the Actions dropdown menu. Note: It is required to create the group by selecting Add all candidates to group from the dropdown menu before performing additional actions. Click the Execute button to complete the selected action.

Select an action from the Actions dropdown menu. Note: It is required to create the group by selecting Add all candidates to group from the dropdown menu before performing additional actions. Click the Execute button to complete the selected action.

Select the Authorization & revision tab to navigate to the Authorization and revision management section. Select desired authorization and revision options by selecting the appropriate checkboxes. Select the checkbox next to t product/s to apply defined options.

Select the Authorization & revision tab to navigate to the Authorization and revision management section. Select desired authorization and revision options by selecting the appropriate checkboxes. Select the checkbox next to t product/s to apply defined options.

Click the Update selected button to update the selected products with the defined options.

Related Documents

Related Documents

Related Documents are documents that internally associated to the product, including Calculation Reports generated from various Wizards.

Select the Related Documents from the Products menu to open the Related Documents form.

Use the Related Documents toolbar to add, edit, delete, print/export, refresh, filter on related documents.

Use the Related Documents toolbar to add, edit, delete, print/export, refresh, filter on related documents.

Select the Add icon to open the Manage Related Document form.

Select the Add icon to open the Manage Related Document form.

Click the Upload File button and select a file to associate to the product. All selected files appear in the Selected files section.

Click the Upload File button and select a file to associate to the product. All selected files appear in the Selected files section.

Select a document type from the dropdown menu or select the Document Type icon to create a new document type.

Select a document type from the dropdown menu or select the Document Type icon to create a new document type.

Use the Document Type form to add, edit, delete, print/export, refresh, filter document types. Click the Add icon to add a new Document Type. Fill out the Document Type – New form and click the Save button to create a new Document Type.

Use the Document Type form to add, edit, delete, print/export, refresh, filter document types. Click the Add icon to add a new Document Type. Fill out the Document Type – New form and click the Save button to create a new Document Type.

Select a Supplier for the related document by clicking the Search icon. Use the Select Supplier form to add, edit, delete, and filter suppliers.

Select a Supplier for the related document by clicking the Search icon. Use the Select Supplier form to add, edit, delete, and filter suppliers.

Click the Add icon to add a new Supplier. Fill out the Edit Supplier form and click the Save button to create a new Supplier.

Click the Add icon to add a new Supplier. Fill out the Edit Supplier form and click the Save button to create a new Supplier.

Select a language from the Language dropdown menu

Select a language from the Language dropdown menu

Input comments into the Comments field.

Input comments into the Comments field.

Click the Save button to associate the document/s to the product. Now the associated document/s appear in the Related Documents grid.

Internal Vendors Docs tab

If using DocuWERCS module, manage Internal Vendor Documents from the Internal Vendor Docs tab. A list of vendor documents displays in the Vendor Documents grid. Right click on a document to view or delete the document.

All Published Documents

All Published Documents

All Published Documents form supports view and management of all previously published documents.

Select All Published Documents from the Products menu to open All Published Documents form.

Use the tabs at the top of the form to navigate to published documents for a particular format: RTF, HTML, PDF, or ALL. Reference the legend at the bottom of the form for an explanation of Authorization values.

Use the tabs at the top of the form to navigate to published documents for a particular format: RTF, HTML, PDF, or ALL. Reference the legend at the bottom of the form for an explanation of Authorization values.

Click the Archive tab to view and restore archived documents. Access View and Restore options by right-clicking on a document row.

Click the Archive tab to view and restore archived documents. Access View and Restore options by right-clicking on a document row.

Hide unauthorized documents checkbox – Select to hide documents that are not authorized for publication.

Hide unauthorized documents checkbox – Select to hide documents that are not authorized for publication.

Custom Fields – Select to view custom fields in the List of the published documents grid.

Change multiple – Select to archive documents, change the Authorization Value of multiple documents at once.

Use the checkboxes to the left of each document row to identify documents to change.

Use the checkboxes to the left of each document row to identify documents to change.

Use the dropdown menu (left of the Execute button) to identify the change being requested.

Use the dropdown menu (left of the Execute button) to identify the change being requested.

Click the Execute button to process the selected change.

Click the Execute button to process the selected change.

Demote a product to an alias

Demote a product to an alias

Demote a product to an alias changes the product status from master to alias and permits the selection of a new master product.

Note: Once this action is complete, the data is permanently lost unless the product is archived beforehand or the database is restored from a backup.

Select Demote a product to an alias from the Products menu to open Demote product form.

Click the appropriate Search icons to identify a Product to demote and a New Master Product from the Select product form.

Click the appropriate Search icons to identify a Product to demote and a New Master Product from the Select product form.

Delete demoted product’s data checkbox – Select to delete all data associated to the demoted product.

Click the Demote selected product button to complete the action.

Click the Demote selected product button to complete the action.

Check in/out

Check in/out

Check in/out functionality supports the ability to check in and check out product groups. Product groups that are checked out are not authorized for publication.

Select Check in/out from the Products menu to open Assign/Reassign Product Group form.

Click the appropriate Search icons to select a Product Group and a User Name.

Click the appropriate Search icons to select a Product Group and a User Name.

Click the Notes button to view, add, export associated product notes.

Click the Notes button to view, add, export associated product notes.

Click the Check OUT button or Check IN button to complete the specified action.

Click the Check OUT button or Check IN button to complete the specified action.

A Status message appears in the Status section confirming the product group ID, status (check in/check out), user name, and date of the status change.

A Status message appears in the Status section confirming the product group ID, status (check in/check out), user name, and date of the status change.

For more information, please visit: https://wercs.helpdocsonline.com/products

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Managing the document queue

Select the Document Queue icon to manually add documents to the job queue for publication using the Document Queue pop-up form.

Use the toolbar to add, edit, delete, print/export, refresh, filter documents in the document queue.

Select documents in the queue to process manually then click the Process Documents button.

Click Delete selected button to delete selected documents from the queue.

Click the Clone Selected Row button to clone a selected document item in the queue.

Adding a document to the queue

Click the Add icon in the Document Queue toolbar to add a document to the queue.

Select a Product, Group, or Generic to add to the document queue.

Select one of the following publishing options:

Act on single item – Add one item to the queue.

Re-publish authorized published documents – All previously published, authorized documents is added to the queue and be republished.

Apply base set to item – Each item is published in all formats, subformats, etc. as determined by the base set assigned in the Administrator module.

Select the desired Queue options using the corresponding Search button, dropdown menu, and/or checkbox.

For more information, please visit: https://wercs.helpdocsonline.com/e8m514tuvivu1ds3cptr

Managing Aliases Attributes

Managing aliases with attributes

Select the Aliases with Attributes icon to view all aliases that contain attributes on the Aliases with Attributes form.

Use the toolbar to edit, print/export, refresh, filter Aliases.

Select the Edit icon to manage alias attributes using the Manage alias attributes form. See Section 4.5 Product Aliases for additional information.

For more information, please visit: https://wercs.helpdocsonline.com/managing-aliases-attributes

Using Wizards Toolbar 2

Using the Wizards toolbar

The Wizards toolbar contains the various Wizards available in WERCS Studio and additional tools.

Regulation Matrix – See Regulatory Tracking reference for additional information.

Apply Rules – See Rule Writer reference for additional information.

GHS Wizard – See GHS Wizard reference for additional information.

Transportation Wizard – See Transportation Wizard reference for additional information.

ACW Wizards – Contact Customer Service for additional information.

For more information, please visit: https://wercs.helpdocsonline.com/using-wizards-toolbar-2

Using Wizards Toolbar

Using the Workflow toolbar

The Workflow toolbar contains shortcuts to certain Workflow tools.

Tasks Status – View task status for all tasks assigned to the product.

Tasks by role – View the statuses of tasks assigned to user role.

Analyze activity – Create customizable displays to view the task information of a product.

View tasks status

Confirm or change the Product.

Filter the list of tasks by User or Workflow using the appropriate Search icons. Select the appropriate All checkbox to view all roles or workflows.

Click the Show button to display the tasks details for the selected product.

View tasks by role

Select the Tasks Status icon to view the statuses of tasks assigned to your current role using the Tasks by role form.

Analzye activity

Search for a Product or Tasks to analyze.

In the Display section, select the corresponding checkbox to add additional columns to the analysis.

Click the Show to view analysis results.

For more information, please visit: https://wercs.helpdocsonline.com/using-wizards-toolbar

Formats And Subformats

Creating and configuring formats and subformats

This topic is for Power Designer users who need to create and design document structures using formats and subformats.

Formats

A format is a list of sections and data elements in a document that determines how data is entered into Studio.

To create a new format:

Enter a Format Code (3-character requirement).

Enter a Description .

To create a new format from an existing format:

Click the Search icon to open the Select the Formats pop-up form.

Double-click the desired format to select it.

Click Save to create the new format.

Subformats

A subformat is a document type that contains specific sections of a selected format.

Add New Subformat

To create a new subformat:

Enter a Subformat Code (4-character limit).

To create a new subformat from an existing subformat:

Click the Search icon to open the Select Subformats pop-up form.

To copy section elements from an existing subformat:

Click Show Sections .

Click Show Sections .

For each section, select how it links to the new subformat: All – Apply the same option to all sections. Relink to New – Add the same section code to the new subformat. Create – Create a new section code with the same caption phrase and maintain all linked data codes. Ignore – Do not add the section to the new subformat.

For each section, select how it links to the new subformat:

All – Apply the same option to all sections.

Relink to New – Add the same section code to the new subformat.

Create – Create a new section code with the same caption phrase and maintain all linked data codes.

Ignore – Do not add the section to the new subformat.

Click Save to create the new subformat.

Click Save to create the new subformat.

Edit subformat

In the Edit SubFormat form, configure the following options:

Subformat Description – Description of the subformat.

Subformat Description – Description of the subformat.

Track Print Flags – Track component print flags.

Track Print Flags – Track component print flags.

Automatic Component Ranges – Automatically generate component ranges during formulation.

Automatic Component Ranges – Automatically generate component ranges during formulation.

Internal Only – Set the subformat as internal use only, ignoring the trade secret settings for the product.

Internal Only – Set the subformat as internal use only, ignoring the trade secret settings for the product.

Enable Change Notification – Send notifications when changes are madeAutomatically send a notification when a change has been made in the Subformat.

Enable Change Notification – Send notifications when changes are madeAutomatically send a notification when a change has been made in the Subformat.

Enter an email address in the Value field or use a distribution list.

Notification includes:

Product/Alias Code

Product/Alias Name

Document Format/Subformat

Language

Plant

Revision Date

Published Date

Non-publishable – Prevent the subformat from being published.

Subsection for component printing thresholds – Automatically trigger if a component prints on the SDS according to its print threshold for a particular subsection. Print threshold values must exist for all components in order for this to be automated.

Subsection for component printing thresholds – Automatically trigger if a component prints on the SDS according to its print threshold for a particular subsection. Print threshold values must exist for all components in order for this to be automated.

Subsection for component hazard indicators – Automatically select the Hazardous checkbox when a component and percentage are entered in the Product Formulation form.

Family for reason for revision codes – Select the Enable Reason for Revision checkbox to display reason for revision phrases in Section 16 of the SDS. A specific subsection can also be assigned, allowing Subformat specific phrases to be selected from the Reason for Revision form. This selection is remembered and saved to the subformat.

Search Criteria – Enter up to five custom filters to search for product records at the subformat level.

Search Criteria – Enter up to five custom filters to search for product records at the subformat level.

Languages – Select languages for publishing for the selected subformat. Note : The application setting COMMON > STORELANGSFORSUBFORMAT controls whether this section is displayed. Set to 1 to display Languages. Set to 0 to hide Languages.

Languages – Select languages for publishing for the selected subformat.

Watermark Settings – Select watermark for internal documents (RTF and PDF only).

Printer Settings – Choose paper size and orientation.

Table of Contents (TOC) – Select the Enable TOC checkbox to enable a Table of Contents. Select the font type and size for a Table of Contents (TOC). A TOC is available for RTF and PDF published documents that contain subformats specified by the application setting PUBLISHER > USE_TOC. Datacodes can also be added as secondary points in the TOC by creating @TOC phrase in the phrase family and assigning it as the default.

Related application settings

EXPOSURE SCENARIO > SUBFORMAT LIST – Specify which subformats have a TOC for documents published from the ES Publisher.

PUBLISHER > TOCTITLEDC – Add a translatable title to the TOC by adding a data code with the desired caption to the Value.

Font Group – Select a font group from the dropdown menu. Applying a font group sets a font for the entire subformat. The font group can be set up to use different fonts based on the language. See Administrator reference for additional information on font group configuration.

Collapse Defaults – Control default field collapse behavior for the selected subformat. Select Default to follow the general application setting COMMON > COLLAPSEDEFAULTS

Collapse Defaults – Control default field collapse behavior for the selected subformat. Select Default to follow the general application setting COMMON > COLLAPSEDEFAULTS

Click Save to apply changes or Cancel to close the form without saving.

Click Save to apply changes or Cancel to close the form without saving.

For more information, please visit: https://wercs.helpdocsonline.com/formats-and-subformats

Product Formulation Authoring

Managing product formulations and models (Authoring)

This form contains the following fields:

Product ID and Format/Subformat combination display in the top left corner of the form.

Use the respective Search icon to change the desired fields.

Select the Impact Analysis icon to open the Regulatory Data Impact Analysis report for components present in the product formulation.

See RegLoader/Browser and Impact Analysis reference for additional information.

SubFormats to print button – Select to open the Print Flags form. See Section 9.3.2 Print Flags for additional information.

Use the Product Formulation toolbar to add, edit, delete, refresh, export Product Formulation grid.

Select the Add icon to add a component to the product formulation from the Select component form.

See Section 5.1 Manage Components for additional information.

Search components field – Search for components using any assigned identifier (CAS Number, Name, Alternate ID, etc.) and select it from the pop-up form list to add the component to the product formulation.

Wrap Text checkbox – Select to wrap text in the Product Formulation grid.

Once a component is added, enter or verify the following information in the Product Formulation grid:

Remove – Remove the component from the formulation. (This option is only available when adding a new component.)

Sync Model – This option must be selected to ensure model and master formulation data is sync’d.

CAS Number – Unique identification number, assigned by the Chemical Abstracts Service (CAS) in the US to a chemical substance.

Component ID – An auto-assigned ID that identifies components.

Chemical Name – The name of the component.

Hazardous – Select this checkbox if the component is hazardous.

Value – The exact value of the component in the parent product.

Unit – A unit other than percent. Edit a component’s unit in the Edit component form. See Section 2.3.1.1 Right-click Options for additional information.

Percent Range – A percent range of the component in the parent product.

Trade Secret – If the component is a trade secret, the trade secret name displays.

Authorize – Select this button to authorize the product.

Revision – Select this button to change the revision date to today. Revision increments are controlled by COMMON > REVMARKS application setting.

Revision – Select this button to change the revision date to today. Revision increments are controlled by COMMON > REVMARKS application setting.

Models – See Section 2.3.1.2 Models for additional information.

Archive – Select this button to archive the product formulation. A history of a product's formulation can be accessed via the BOM module.

Create Component – Select this button to create a new component. See Section 5.2 Add Component for additional information.

Import – Selection this button to import components from external Excel files.

From the Import Data form, select the Export to Excel button to export an Excel template containing columns that can be imported.

Fill in the columns (only CAS Number is required), then copy and paste data into the Import Data form.

Shortcuts to other modules – Hover over the icon to view the name of the module. Select the icon to open the desired module.

Additional Columns – Select this button to add up to ten additional columns to the Product Formulation form. Additional columns support CVAL, CTXT, FVAL, and FTXT. Use the Additional Columns form to assign a subsection to a Column (A-J)

Click the Calculate column checkbox and enter the desired value into the pop-up form field if the column contains a calculated value.

Right-click options

From the Product Formulation grid, a variety of right-click options are available. Select a component row, then right-click to open the following menu:

Edit component

Delete component

Remove multiple

Component Alias Names

Notes

Related Documents

Edite attribute

Reorder

Edit component — Select to open the Edit component form where users can edit component data relative to the product. Value — Concentration of the component in the product Units — Use the dropdown menu to select a unit other than Percent. Percent Range — Range displayed for all Format/Subformats. Subformat specific Percent Range - Enter a Format/Subformat to which the Percent Range should apply. Leave the field blank to apply the percent range to all Format/Subformats. Hazardous — Select this checkbox if the component is hazardous.

Value — Concentration of the component in the product

Units — Use the dropdown menu to select a unit other than Percent.

Percent Range — Range displayed for all Format/Subformats. Subformat specific Percent Range - Enter a Format/Subformat to which the Percent Range should apply. Leave the field blank to apply the percent range to all Format/Subformats.

Hazardous — Select this checkbox if the component is hazardous.

Hide CAS — Select this checkbox to hide CAS Number of the component for the Format/Subformat listed on the Product Formulation form.

Trade Secret — Select this checkbox if the component is a trade secret.

Delete component — Select this option to delete the highlighted component from the product formulation.

Remove multiple — Select this option to delete multiple components from the product formulation.

Component Alias Names — See Section 5.1 Manage Components for additional information.

Notes — See Section 5.1 Manage Components for additional information.

Related Documents — See Section 4.12 Related Documents for additional information.

Edit attribute — See Section 5.1 Manage Components for additional information.

Reorder — Select this option to reorder the components in the formulation.

Alternate Identifiers — See Section 5.1 Manage Components for additional information.

Models

Models support specific versions of product formulations that may not be identical to the final formulation. For example, models can display a product’s formulation as it was prior to blending, its pre-reaction/post-reaction formulation, or components in a product subject to certain regulations.

The form contains the following fields:

Enter Model ID and Model Description in the corresponding fields.

Click the Synchronize with master model (formulation form) checkbox to sync the model with master formulation.

Select a model from the Models available grid to see components in the model formulation.

Copy From — Click this button to replace the selected model's data with data from another model. Select the new model from the corresponding dropdown menu.

Use the toolbar above the Model formulation for Product (Product ID) grid to add, edit, delete, print/export, refresh, and filter components in the model formulation.

For more information, please visit: https://wercs.helpdocsonline.com/product-formulation-authoring

Components 2

Creating and managing chemical components

This topic is for Power Author and Power Designer users to manage chemical component data. The Components menu provides tools for creating, editing, copying, and organizing components and their attributes.

Accessing the component management tools

Manage components – View and manage components and their attributes.

Add component – Create a new component.

Component Copy – Copy attributes from an existing component to a new one.

Component Ranges – Manage automatic component ranges.

Update CAS number – Change a component's CAS number.

Manage Identifiers – Add and manage alternate identifiers.

Managing components

Select Manage components from the Components menu.

Use the toolbar to: Add new components Filter, refresh, or export the grid

Add new components

Filter, refresh, or export the grid

Click a component row to view its attributes in the grid.

The CAS Number and Component ID of the selected component display in the top left corner of the form.

Use the toolbar in the Components Subsections grid to add, edit, delete, filter, refresh, export component attributes. Click the Add icon to select a subsection from the Select subsection form.

Depending on the usage type of the subsection selected, different Edit Content forms opens. See Assigning attributes on the Document Canvas for additional information.

Right-click options

Name Translations : Manage translations and create new components.

Promote to Product : Create a product from the selected component.

Edit attribute : Edit component attributes (affects all formulations).

Edit component : Edit identifier data (Chemical Name, Trade Secret Name).

Notes : Add internal notes to a component.

Related Documents : Manage documents associated with the component.

Delete : Remove a component (only if unused in formulations).

Component Summary : View and export a report of component attributes.

Attach Regulations : Assign regulations to the component.

Name translations

In the Components section, confirm selected component details.

Use the Search icon to view a different component's name translations if desired.

Click the Create component button to create a new component. See Section 5.2 Add Component for additional information.

Select language from the drop-down menu.

Enter a Chemical Name and Trade Secret Name (if desired) in the corresponding fields.

Click the Apply name changed to all occurrences of CAS # checkbox to add the new name translation to all instances of the CAS #.

Click the Chemical names button to view the full list of available translations for the selected chemical name.

Click the Load chemical name translations button to select processing options to load chemical name translations. See the RegLoader/Browser reference for additional information.

Click the Load chemical name translations button to select processing options to load chemical name translations. See the RegLoader/Browser reference for additional information.

Promote to product

Select the Promote to product option to create a new product from the selected component. All component data include Component ID, and all of its attributes are prompted to product level data. The newly created product's formulation consists 100% of the selected component.

Promoting a component to a product does not change the component itself. It remains as a component with all attributes intact.

Edit Attribute

Editing a component attribute affects every formulation that contains the component. See Manage Components (above) for additional information about the Edit attribute form.

Edit Component

Notes

Click Save to add the note to the component. On the Manage components form, a Note icon appears next to components with associated notes.

Related documents

Delete

Select the Delete option to delete the selected component from the database. Only components not being used in master or model formulations can be deleted.

Components Summary

Select the Component Summary option to view, print, or export a report of data attributes assigned to the selected component.

Attach Regulations

Select the Attach Regulations option to assign desired regulations to the selected components. Select the checkboxes of the desired regulations, then click the Navigation button.

Add component

Use this function to create new components. Select Add component option from the Components menu to open Create components form.

Enter a valid CAS Number.

Enter a valid CAS Number.

Manually enter a Component ID or click Get next ID to generate the ID.

Manually enter a Component ID or click Get next ID to generate the ID.

Enter a Chemical Name and Trade Secret Name in the provided fields.

Enter a Chemical Name and Trade Secret Name in the provided fields.

ChemADVISOR® subscribers can select to load regulation data associated with the CAS Number entered, and/or chemical name translations based on the English name entered.

ChemADVISOR® subscribers can select to load regulation data associated with the CAS Number entered, and/or chemical name translations based on the English name entered.

This field is optional. It is linked to the application setting COMPONENTS > CLASSIFICATION_DATACODE. Assign a subsection in the application setting value to add it to the form.

This field is optional. It is linked to the application setting COMPONENTS > CLASSIFICATION_DATACODE. Assign a subsection in the application setting value to add it to the form.

Click Save to create the component. Click Close to exit without creating the component.

Click Save to create the component. Click Close to exit without creating the component.

Component Copy

Copy certain elements of an existing component and apply them to a new component. These elements include:

Component values and phrases

Component values and phrases

Regulation listings

Regulation listings

Regulation compliance data

Regulation compliance data

Repeating dataset values

Repeating dataset values

Repeating dataset phrases

Repeating dataset phrases

Component notes.

Component notes.

Select the Component Copy option from the Components menu to open the Component Copy form.

Select a source Component, Format, and Section in the From Component section.

Select a source Component, Format, and Section in the From Component section.

Select Chemical Translation Names to copy the source’s chemical names.

Select Chemical Translation Names to copy the source’s chemical names.

Select the Delete ‘To’ checkbox to delete all chemical translation names assigned to the designation component.

Select the Delete ‘To’ checkbox to delete all chemical translation names assigned to the designation component.

Select a designation Component and Format in the To Component section.

Select a designation Component and Format in the To Component section.

Click Copy to complete the component copy.

Click Copy to complete the component copy.

Component Ranges

Manage automatic component ranges for specific format/subformats.

Select Component Ranges option from the Components menu to open the Component Ranges form. Use the toolbar to add, edit, delete, print/export, refresh, and filter the components range assigned to the specified Format/Subformat.

To add a new component range, click the Add icon and enter the desired ranges into the New – Component Range pop-up form.

Update CAS number

Update the CAS Number for an existing component.

Select the Update CAS Number option from the Components menu to open the Component Ranges form.

Select a component using the Search icon, then enter a new CAS Number. Click Update to update the CAS Number.

Manage Identifiers

View and manage customer and regulatory identifiers.

Select the Manage Identifiers option from the Components menu to open Manage Identifiers form.

The Manage Identifiers form is divided into two sections — Customer and Regulatory Identifiers.

Customer identifiers are managed solely by Studio users.

Customer identifiers are managed solely by Studio users.

Regulatory identifiers are certain regulatory identifiers that are added to the component during ChemAdvisor® data load. Note: A ChemAdvisor® subscription is required. Please contact Customer Service for more information.

Regulatory identifiers are certain regulatory identifiers that are added to the component during ChemAdvisor® data load.

Use the Customer Identifies toolbar to add, edit, delete, filter, refresh customer identifiers.

Use the Customer Identifies toolbar to add, edit, delete, filter, refresh customer identifiers.

Select the Add icon to create a new identifier.

Select the Add icon to create a new identifier.

Using the Alternate Identifier Type pop-up form, select a Datacode that populates the Description field with the data code description.

Using the Alternate Identifier Type pop-up form, select a Datacode that populates the Description field with the data code description.

Enter a Comment if desired (comments are not displayed on documents).

Enter a Comment if desired (comments are not displayed on documents).

Use the Regulatory Identifiers toolbar to edit or filter regulatory identifiers. Users can edit the Active checkbox to set an identifier to active (selected) or inactive (not selected) from the Alternate Identifier Type pop-up form.

Use the Regulatory Identifiers toolbar to edit or filter regulatory identifiers. Users can edit the Active checkbox to set an identifier to active (selected) or inactive (not selected) from the Alternate Identifier Type pop-up form.

For more information, please visit: https://wercs.helpdocsonline.com/components-2

Phrases 2

Managing phrase libraries and translations

This topic is for Power Author and Power Designer users to manage phrase data, including translations, usage tracking, and bulk updates. The Phrases menu provides tools for managing phrases, reviewing usage, and updating phrase values across products and components.

Module access

To access phrase management tools, navigate to the Phrases menu and select from the following options:

Phrase Management – Manage phrases and translations.

Subsection/section where used – View which formats and subformats contain specified sections, subsections, and usage types.

Data Value Review – Update the data values of a phrase family for products and/or components.

Global Update – Update products by adding, replacing, or removing phrases from a single product or product group.

Phrases in use – View phrases assigned to products or components.

Search documents – Search published documents by phrase or keyword.

Phrase management

Use the Phrase Management form to manage and search for phrases, including translations.

Use the toolbar to: Edit, delete, print/export, filter phrases.

Edit, delete, print/export, filter phrases.

When selecting a phrase family from the Family selector field instead of using the Select All option, the Add icon appears in the Phrases toolbar, allowing users to add a new phrase to the family.

Selecting Add icon or Edit icon from the Phrases toolbar opens the Edit phrase pop-up form. The Edit Phrase and Translations forms are described in the Translation Manager .

Right-click options

From the Phrase Management form, right-click on a phrase to access:

Edit – Select to edit the phrase using the Edit phrase pop-up form. This pop-up form is described in detail in the Translation Manager reference.

Delink phrase from family – Select to remove the phrase from the family. The phrase still exists in the database.

Completely delete phrase – Select to delete the phrase, its links, and translations.

Translations – Select to manage phrase translations using the Translations form. This pop-up form is described in detail in the Translation Manager reference.

Subsection/section where used

Subsection/section where used – Search for Format, Subformat, and Section where a Subsection is used. Selecting an item opens that location.

Custom Categories – View Subsections that meet the requirements of custom categories. Use the Subsections toolbar to add, edit, delete, filter existing categories.

Click the Add New icon to add a new custom category.

Enter a Category Name and Category Description.

Click the data code Search icon to select a subsection from the Select subsection form. Repeat this action until all desired data codes are added to the SubFormat grid.

Click the Save button to create the new category.

Click the Search icon to select a rule from the Select Rule pop-up form. The list of rule groups associated with the selected rule appears in the Groups grid. Use the Groups toolbar to print, refresh, filter the grid results.

Rule Streams – View a list of rule streams in which a specific rule group is used.

Click the Search icon to select a rule group from the Select group pop-up form. The list of rule streams that contain the specified rule group appears in the Rule Streams grid. Use the Rule Streams toolbar to print, refresh, filter the grid results.

Data value review

Update selected data values of a family for products and/or components. This functionality is useful if there is a change in the specific value for products and/or components that require a mass update.

Choose a product or component.

Select a subsection using the Search icon to open the Select subsection form. If a product is selected, the form filters on PVALs. If a component is selected the form filters on CVALs.

Select a specific PVAL/CVAL subsection or a range criteria to show. If desired, select the Only show records with no data checkbox.

Click the Show button to display results. Records matching the specified criteria populate in the grid below. Use the Edit icon or right-click option to edit the value of a selected record. See Section 2.2.1 Assigning Value Attributes for additional information.

Global update

Complete phrase additions, deletions, and replacements in bulk transactions. Global Update is a powerful feature that should be used cautiously:

Warning: Use this feature cautiously due to its wide impact.

Select Global Update from the Phrases menu to open the Global Update form.

Select a Format, Subsection and phrase using the appropriate Search icons.

Select an Action: Add, Delete or Replace. The Replace option allows users to replace up to four phrases in specific subsections.

Select to apply the action to Products, Components or Aliases. Each type provides the option to apply the action to All or Selected products, components, or aliases.

Click the Update revision dates checkbox to perform the action for the specified products, components, or aliases.

Click the Run this job later checkbox to select a Date and Time to process the job.

After making all desired selections, click the Update button to perform the global update.

Phrases in use

Search for products or components that use specific phrases.

Select Products or Components to search for phrases associated to products or components.

Click the Show button to view results of the query at the bottom of the form. Use the toolbar to print/export and filter the results.

Search documents

Search by keywords or strings of text found in published documents. Use AND/OR parameters inside parentheses, if desired.

Enter search criteria in the Enter Criteria field.

Select a language.

Click Show filters to refine the search.

For more information, please visit: https://wercs.helpdocsonline.com/phrases-2

Advanced Tools

Using advanced tools for comparison, publishing, and configuration

This topic is for Power Author and Power Designer users to access advanced tools for comparing formats and products, managing publishing configurations, and customizing document output. These tools are accessed via the Sections side panel on the Document Canvas or the Tools menu toolbar.

Accessing the Advanced Tools

Use this section to understand how to access the tools and what areas are available once inside.

Module Access

To access advanced tools, use the Sections panel or the Tools menu to open the following forms:

Compare Subformats

Compare Products

Regulation Matrix

Suppliers

Manage Reactions

Reason for Revision

Cover Letter Management

Label Publisher

Limit Section Language

Manage Watermarks

Compare Subformats

The Template Selector pop-up form opens.

Click the Multiple Templates (Limited editing controls) checkbox

Use the Search icon to open the Format/Subformat pop-up form. Select a format/subformat from the pop-up form.

Highlight a section to add it for comparison.

Use the navigation icons to select/remove sections for comparison.

Select Remember these Selections checkbox saves on-form selections. Clicking the clear button does not overwrite your saved preferences.

Click Save to save selections. Click clear to clear all selections.

Returning to the Document Canvas, an icon appears, and only the selected sections display in the Sections side panel. Click the Select All checkbox to compare the selected sections between specified subformats.

Now the document canvas shows the selected sections of each selected subformat side-by-side.

To close the comparison, click on the Template icon again and deselect the Multiple Templates (Limited editing controls) checkbox, then click Save .

Compare products

The Product Compare tool allows side by side comparison between assigned data for two products/aliases and copy the data from one product to the other.

Choose the Search icon to select a product or alias to compare.

Choose the Search icon to select the other product or alias to compare.

Click Apply to load the comparison.

Use the up and down arrows to highlight a specific range and navigate differences. Use the left and right arrows to copy data types (PVAL, PTXT, FREE, URL, DMDY, LST, GRPH, GRXL) from one product to another.

Warning: Copying data is irreversible.

Regulation matrix

Manage regulatory and classification data for a selected product.

Select Regulation Matrix from the Tools menu.

Use the form to view and manage regulatory tracking.

See Regulatory Tracking for more details.

See Regulatory Tracking for more details.

Suppliers

Manage supplier contacts used across modules.

Use the toolbar to: Add, edit, delete, filter, refresh, export supplier data

Add, edit, delete, filter, refresh, export supplier data

Click Add to open the Edit Supplier form.

Send Receipt checkbox

Manage reactions

Manage chemical reactions and generate new master formulations. Select Manage Reactions from the Tools menu to open the Manage Reactions form. See the BOM reference for additional information.

Reason for revision

Automate the Reason for Revision subsection in Section 16 of a SDS subformat by setting the criteria that triggers a revision, per subformat, and outputs specific text in the subsection.

Use the toolbar to add, edit, delete, print/export, refresh, filter specific reasons for revision.

The following set of Revision Codes are available:

COMPADDA – Component has been added to the formulation.

COMPADDS – Component with a specific component value has been added to the formulation.

COMPDELA – Component has been removed from the formulation.

COMPDELS – Component with a specific component value has been removed from the formulation.

COMPPCTA – Weight of a component in the formulation has been modified by X%.

COMPPCTS – Weight of a component with a specific component value in the formulation has been modified by X%.

COMPVALS – Component's value (CVAL) for a specified subsection has been modified by X%.

PRODTEXT – Phrase has been added to or removed from a product.

PRODVALA – Product’s value has changed for a specified subsection.

PRODVALS – Product’s value has changed by X% for a specified subsection.

Select a Subsection to monitor for the action and desired Value/Units and/or Percent.

Select the phrase to appear in the Reason for Revision subsection of the document.

Click Save to add the new reason for revision.

Cover letter management

Manage the following types of cover letters:

Primary letters are generated by default when an SDS or document is sent to a customer.

Supplementary letters are manually generated in addition to the primary letter.

Where available, use the Search icons to select a Format, Subformat, Used by Plant and Used by Country.

Select a customer Type from the dropdown menu.

Select the Default (Primary) Letter checkbox or Envelope Page checkbox to apply the option to the new cover letter.

Add a cover letter description to the Description field,

To add associated phrases that trigger a secondary cover letter, use the toolbar in the bottom grid to add, edit, and filter trigger phrases.

If you add a new trigger phrase, select the Add icon then use the Select Text Phrases pop-up form to add a phrase.

Click the Add New icon in the Available in Languages section of the Cover Letter pop-up form. Use the Letter Template pop-up form to upload a letter template (must be an RTF file) and select a cover letter language.

Click Save to save the new cover letter.

Label publisher

Publish labels for distribution by generating a label as a PDF document that can be published to the web viewer. Select Label Publisher from the Tools menu to open the Label Publisher form. See the Label Publisher reference for additional information.

Limit section language

Assign languages to publish for individual sections. Some regulatory bodies may require that Section 8 of the EU SDS be split into different sections and languages. Limit Section Language functionality manages different Section 8 options within one EU template.

Select Limit Section Language from the Tools menu to open the Limit Section Languages form.

Click the corresponding checkbox in the Master column to select a Master section. Only one Master section can be selected.

Click the corresponding checkbox in the Child column to select sections that publish only with certain languages. Multiple Child sections can be selected. All languages populate in the Language column for the Master section when a Child section is selected.

Click on the section row to make it active then use corresponding checkboxes to identify languages in which the section is published. As languages are assigned to child sections, the languages are removed from the Master.

Click Save to save the custom sections.

The Master Section now appears as an expandable option in the Sections panel on the document canvas. Expand the section to see each child and language assigned to the master sections.

Manage watermarks

Add custom watermarks to Studio for published documents. Added watermarks are selected at the time of publishing.

Select Manage Watermarks from the Tools menu to open the Manage Watermarks form. Use the toolbar to add, edit, delete, filter, refresh customer watermarks.

Select the Add icon to add a new watermark using the Watermark pop-up form to add a Name and upload the Picture file.

Click the View link to see a preview of the watermark.

For more information, please visit: https://wercs.helpdocsonline.com/advanced-tools

Sections

Designing and formatting document sections

This topic is for Power Designer users to add, organize, and format document sections within a subformat. These tools enable users to define structure, control layout, and apply consistent formatting across published documents.

Accessing the section design tools

Use this section to understand how to access the form and what areas are available once inside.

Module access

To design and format document sections:

Right-click on a section to access formatting and management options.

Adding a new section

Follow these steps to add a new section to a subformat.

Click the Plus icon to add the first Section.

Right-click on an existing section and select Add to insert additional sections.

Add New

Edit selected

Delete selected

Adding a phrase family

Click Add New in the Select section form to open the View Phrase Family pop-up.

Double-click a phrase family or select a row and click OK to add it.

To create a new phrase family: Click Add New to open the Edit phrase – New Phrase form. Enter a section name in the Translation field. Click OK to save

Click Add New to open the Edit phrase – New Phrase form.

Enter a section name in the Translation field.

Click OK to save

The Edit Phrase form is described in detail in the Translation Manager .

Section formatting

Use the Section Formatting menu to format headers and control layout. Right-click on a section in the Sections panel and select Section Formatting .

In the formatting form, configure header options: Select a font type and size from the dropdown menus.

Select any other font format and alignment options for the header. Hover over each icon to see its title. SH Section Header – Divides all document information into user defined categories. RH First Page Header – Appears only at the top of the first page of the document. RF First Page Footer – Appears only at the bottom of the first page of the document. PH Page Header – Displays information at the top of each page, starting on page 2. PF Page Footer – Displays information at the bottom of each page, starting on page 2.

SH Section Header – Divides all document information into user defined categories.

RH First Page Header – Appears only at the top of the first page of the document.

RF First Page Footer – Appears only at the bottom of the first page of the document.

PH Page Header – Displays information at the top of each page, starting on page 2.

PF Page Footer – Displays information at the bottom of each page, starting on page 2.

Users may select additional formatting options:

Print Header – Display the header at the beginning of the Section on the document and add the header to the TOC if the Subformat is identified in the Application Setting: Publisher > USE_TOC.

Keep together – If a section is broken up onto multiple pages, automatically insert a page break above the section so it appears on one page.

Non – publishable – Prevent selected Sections from being published.

Managing sections

Reorder sections

Select Reorder to open the Reorder Sections form.

Click Save to apply changes.

Remove sections

Select Remove to delete a single Section.

Choose sections to remove and click Remove selected to remove selected sections from the subformat or exit the pop-up form by selecting X at the top right corner of the pop-up form.

Copy and paste sections

Choose sections to copy and click Copy to remove selected sections from the subformat, or exit the pop-up form by selecting X in the top right corner of the pop-up form.

After selecting Sections to copy, open the destination subformat.

Right-click on a section and select Paste from the Section Formatting menu.

Edit section name

Select Edit phrase to rename a section.

Use the Edit Phrase form to enter a new name. This pop-up form is described in detail in the Translation Manager .

Click OK to save changes.

Apply formatting to multiple sections

Select Apply to others to apply section formatting to multiple sections at the same time.

For more information, please visit: https://wercs.helpdocsonline.com/sections

Subsections

Creating and configuring subsections for data entry

Use Power Designer to create, configure, and format subsections. Subsections define and hold displayed data and are assigned to a section. You can manage their structure, formatting, default values, validation rules, and table layouts to support consistent data entry and document output.

Accessing subsection configuration tools

Use this section to understand how to access the form and what areas are available once inside.

Two methods are available for configuring subsections:

Add a new subsection

Click the Add New button in the document canvas.

Right-click on an existing subsection and select Insert Before or Insert After .

These actions open the Add Subsection pop-up form:

Select a Subsection Type and a Usage Type from the appropriate dropdown menus.

See Creating and formatting reserved subsections for information on subsection type.

See the Usage Types for information on usage types.

Select the Add New icon to open the Edit phrase pop-up form to create a new subsection. See Translation Management for more information.

Select the Edit icon to manage the phrase and its translation. See the Phrase Management section for more information.

Select the Filter icon to filter for data code, scope, or subsection name.

Select the Refresh icon to refresh the grid below.

Search for existing subsections in the Filter field. Click on a subsection from the grid to select it.

Click the Additional information checkbox to display other subformats where the selected subsection is utilized.

Click the Content used in similar Sections link to view subsections that are found in the same section of other subformats.

Select Save and Close or Save and Edit to save the subsection and close the pop-up form.

For more information, please visit: https://wercs.helpdocsonline.com/subsections

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Editing subsections assigned to a section

Edit phrase – Select to open the Edit phrase pop-up form and edit the name of the subsection. This form is described in detail in the Translation Manager .

Copy – Select to enter Copy Mode, clicking on a subsection to select it for copy.

Paste – navigate to a new section, then select paste to insert the copied subsection.

Click the Save button to continue.

Reorder – Select to enter Reorder Mode. Click and drag a subsection to change the order. Click the Save button to process the change.

Split table – Select to open the Split table pop-up form, and follow the instructions to split subsections into a new table. Click Save to process the change.

Subsection Details side panel

Clicking on a subsection opens the Subsection Details side panel. This panel looks different depending on whether the user is working in Power Author or Power Designer.

In the Power Author module, this information is View only.

Use the Power Designer to edit subsection details and format.

Power Author

The top section contains the name of the data element (data code or XGROUP), the author, date, and time of the last edit.

Data Required – Select the checkbox to require the data element to have data to publish templates containing the data element.

Generic – Select the checkbox to associate the data to all children of a generic product.

New Line – Select the checkbox to add a line between the selected data element and the next data element.

Prevent Collapse – Select the checkbox to print an individual subsection with no default phrase selected. Deselect to collapse the subsection when there is no data. This option is available for the following usage types: CTXT, FTXT, PTXT, GRXL, CVAL, FVAL, PVAL, URL, LST, FREE, GRPH, and DMDY.

Subsection code – The data code for the selected data element. Defaults for the data element are only accessible in Power Designer. See Section 9.3 Defaults for additional information. If a default phrase is assigned to the subsection code, it displays under the Defaults buttons.

Usage Type – Displays the usage type for the selected data element. In Power Designer, this dropdown allows users to select the usage type for the selected data line. See Usage Type for additional information.

Security/Validation buttons – In Power Designer, users can align validation and security requirements. See Security/Validation for additional information.

The Run rule group after value changed – Displays a rule group/rule stream that runs after the data element has been manually changed. In Power Designer, users can add/edit/delete rule groups/streams that run using the corresponding buttons.

Appears in these templates – Displays a list of templates containing the selected data element. Click the “+” / “-“ buttons to expand/collapse this section.

Previous/ Next buttons – Use the buttons to navigate between data elements.

Power Designer

Opening the Subsection details side panel in the Power Designer module and selecting a data code displays the same options described above. However, Power Designer offers extended functionality to edit and format subsections.

Subsection formatting

Subsection formatting area consists of three sections:

Subsection Formatting

Data Label

Data

Subsection Formatting – This section is used to modify the appearance and placement of the subsection within a section.

Data Label – Modify the appearance of the subsection data label.

Select a caption suffix from the dropdown menu.

Select a font and size from the corresponding dropdown menus.

Data – Modify the appearance of the subsection data.

Select appropriate font, size, and format options.

If desired, select the Apply to others button to enter Apply Format to others mode. Use the Document Canvas to apply subsection formatting to multiple subsections.

Click Save to apply the changes.

Print flags

The Prints? column displays False if print flags are OFF and True if print flags are ON for the specific format/subformat listed in the header.

Use the toolbar to close (the window), default view (all components per subformat), show all (all subformats per component), print/export all results in the print flags grid.

Click Save to save changes to print flags.

Defaults

Select the corresponding icon to add, edit, delete, or filter phrases. For additional information on phrase management, see the Translation Manager.

Double click on a phrase to add it or click checkbox to select multiple phrases.

Click OK to add the selected phrase/s and close the Select Phrase pop-up form.

Select the subsection and click Edit to open the Phrase Selector. For additional information on phrase management, see the Translation Manager .

On the Phrase Selector form, the selected phrase/s now appears. Right-click on a row to display a list of options for the phrase:

On the Phrase Selector form, the selected phrase/s now appears. Right-click on a row to display a list of options for the phrase:

Move up

Move down

Remove

To remove a default phrase from a subsection, click on the subsection, then click Remove from the Subsection Details panel.

Usage types

CMDY: Current Date – Automatically assign the current date.

DMDY: Product Date – Manually enter the product date.

FREE: Free Text – Add phrases that have a 1-1 relationship between the Subsection and product. Free Text cannot be used with rules, global re-sync, and is also not viewable in Translation Manager.

GRPH: Picture – An image.

GRXL: Translatable Picture – Maintain graphical translation based on the selected product. For example: “STOP” in an English document displays “Arrét” on a French document).

LST: Custom List – Represents the “Contains” statement that lists components based on EU-specific criteria. GHS Wizard populates LST with applicable components.

PRDN: Product Names – Automatically display the product name of the selected product.

PRID: Product ID – Automatically display the Product ID of the selected product.

PTXT: Product Text – Display text related to a product. This subsection is translatable.

PUBD: Last Published Date – Automatically assign the last published date.

PVAL: Product Value – Add a free text value related to a product This subsection is not translatable.

RCDS: Repeating Component DataSet – Maintain component information in a list or matrix view.

REGC: Component Regulation – Pulls data from the Regulatory Tracking database to provide regulatory compliance values for each component in the selected product.

REGP: Product Regulation – Pulls data from the Regulatory Tracking database to provide a compliance statement about the selected product.

REVD: Revision Date – Automatically display the product’s most recent revision date.

Note : Add the phrase @PREVIOUS to the family with the REVD usage type and set it as the default phrase for the family to view the revision date of previously revised documents for any F/SF/Product combination.

Note : Add the phrase @PREVIOUS to the family with the REVD usage type and set it as the default phrase for the family to view the revision date of previously revised documents for any F/SF/Product combination.

REVN: Revision Number – Automatically display the revision number.

RPDS: Repeating Product DataSet – Maintain product information in a list or matrix view.

SUBH: Subheader (Caption) – A phrase used to label or clarify succeeding information. It is not component or product dependent.

URL: URL – Add a URL/hyperlink to the document.

CMDY : Current Date

DMDY : Product Date

FREE : Free Text

GRPH : Picture

GRXL : Translatable Picture

LST : Custom List

PRDN : Product Name

PRID : Product ID

PTXT : Product Text

PUBD : Last Published Date

PVAL : Product Value

RCDS : Repeating Component DataSet

REGC : Component Regulation

REGP : Product Regulation

REVD : Revision Date

REVN : Revision Number

RPDS : Repeating Product DataSet

SUBH : Subheader

URL : Hyperlink

Note: Subsections appearing multiple times in the same subformat must have the same usage type. Subsections may have different usage types when used in different subformats.

GRXL setup

To set up GRXL usage types, an Admin user needs to:

Create a folder within the Languages Graphics folder.

Create a Language ID subfolder for each translatable language needed.

After creating this file structure, save each translatable graphic in each Language ID folder. Each associated graphic needs to have the exact same name in each language folder. See Assigning Graphic Attributes for more details.

Validation and Security

Validation

Validation checks the validity of data present in a specific data line.

Enter validation requirements and click Save .

Security

Security enables users to assign access rights to a specific data line.

Enter security options and click Save .

For more information, please visit: https://wercs.helpdocsonline.com/nwrnbbvjur0b6niowcox

Reserved Subsections

Creating and formatting reserved subsections

Reserved Subsections allow for special formatting and can facilitate integration of automated processes such as GHS Wizard and BOM modules.

Standard tables

A Standard Table is a product level table that supports column creation to hold multiple Subsections side by side.

To access a standard table, click Format Table in the Subsection Details panel.

The Format Table pop-up form contains options for setting up a standard table.

The Format Table pop-up form contains options for setting up a standard table.

Filter field – Search for existing subsections to field the results field (2) below.

Double click on a subsection or use the navigation arrows (3) to add or remove subsections from the Selected Columns area (4).

Navigation arrows – Add or remove subsections from the Selected Columns area (4).

Selected Columns area – Selected subsections appear here. Each subsection represents a column in the table. Use the smaller navigation arrows to change the order of a selected subsection.

(smaller) Navigation arrows – Rearrange subsections present in the Selected Columns area.

Prevent Collapse checkbox – If selected, prevents the table from collapsing if data is not populating that specific column.

Same cell checkbox – If selected, merges the selected subsection with the subsection (column) listed above it.

Table Properties – Controls the formatting of the table. The dropdown menu displays the width of each column in the table. The sum of the numbers always equals 100. Show Shadow checkbox – Add a shadow to the table. Show Gridlines checkbox – Add gridlines to the table.

Show Shadow checkbox – Add a shadow to the table.

Show Gridlines checkbox – Add gridlines to the table.

Click Save to save changes. Click Cancel to discard changes.

The Preview section displays how the table currently looks in the document.

The Edit Content section allows users to double click each subsection individually and assign data for that subsection.

Enter data into the pop-up form that appears - either Edit Text or Edit Value , depending on the column property assigned.

Click on and drag columns to rearrange them in the table. Click Save form order to save changes.

Component tables

The Format Table form contains the following fields:

Component Model — To apply a different component model other than the Master, select a model from the dropdown menu. See the Models section for more information.

Hazard Options – Select the Hazardous Only checkbox to display only hazardous components. Select Hazardous/Non Hazardous checkbox to display all components, separated into hazardous and nonhazardous tables.

Repeat header – Select the checkbox to repeat the table header on every page of the table.

Default and identifier columns

Default and Identifier columns both display component identifiers and are managed from the Table Properties section of the Format Table form.

Default column options always display.

To view and edit Identifier column options, select the Identifier column in the Selected Column area.

The Manage Column form contains the following controls:

Manage Column Header section – controls column header data.

The Default column does not allow edits.

The Identifier column allows edits to the column header. Clear the Use Default Header checkbox.

Select the filter icon to search for an existing subsection to use for the custom column header. Double-click on a row to apply the selection.

The Code and Phrase text of identifiers currently assigned to the column appear in the grid.

The Code and Phrase text of identifiers currently assigned to the column appear in the grid.

Click the Add icon to manage identifier phrases.

Click the Add icon to manage identifier phrases.

Click the Delete icon to remove the selected (highlighted) identifier phrase from the column.

Click the Delete icon to remove the selected (highlighted) identifier phrase from the column.

From this form, users can Add , Edit , Delete , Filter identifier phrases by selecting the appropriate icon.

From this form, users can Add , Edit , Delete , Filter identifier phrases by selecting the appropriate icon.

Select an existing identifier phrase by clicking its corresponding checkbox.

Select an existing identifier phrase by clicking its corresponding checkbox.

Click or drag desired identifiers to the Text Phrase workspace. Click the Save button to save the new identifier phrase.

Click or drag desired identifiers to the Text Phrase workspace. Click the Save button to save the new identifier phrase.

Select the Edit icon to open the Edit Phrase pop-up form, and edit the phrase in the Translation field. This pop-up form is described in detail in the Translation Manager .

Select the Edit icon to open the Edit Phrase pop-up form, and edit the phrase in the Translation field. This pop-up form is described in detail in the Translation Manager .

Click Save to save changes.

Click Save to save changes.

Click Save to save changes or Cancel button to exit the form.

Click Save to save changes or Cancel button to exit the form.

Bill of materials

To edit a Bill of Materials (BoM) subsection:

First add the subsection to a document.

Select a Component Model from the drop-down menu that serves as the base for the BoM tree.

If desired, select a Custom Field from the dropdown menu to place data/text from F_CUSTOM at the end of each input product in the BoM tree. Custom field mappings are derived from properties of the subformat. There are 5 options for custom fields.

Limit to one level – Display only one level of input products.

Hide Components – Display only the input products, not the extended formula.

Top Level – Display only the top level input products.

Assign output data (FTXT/FVAL) if the component model is set to the master. The assigned data appears beside the components in the BoM tree.

Do one of the following:

Click Save to save changes.

Click Cancel to cancel.

Click Previous to move to the previous subsection.

Click Next to move to the next subsection.

Page numbering

Edit Page Numbering subsections using the PAGE Editor:

Add the subsection to a document.

Double-click to open the PAGE Editor.

Use the Notes dropdown to select formatting.

To add a new format: Select Add New Use the Default Text form to select phrases Click Save .

Select Add New

Use the Default Text form to select phrases

Click Save .

Page Numbering

To edit a Page Numbering subsection:

First add the subsection to a document.

Double-click on the subsection to open the PAGE Editor form.

Use the Notes dropdown menu to select how the page numbers are formatted on the document.

To add a new page formatting option, select Add New option from the dropdown menu.

Use the Default text pop-up form to select phrases.

Do one of the following:

Click Save to save the new page format.

Click Cancel to cancel.

Click Previous to move to the previous subsection.

Click Next to move to the next subsection.

Multilingual table

Multi-Lingual tables allow multiple language translations to display in one location.

To edit a multilingual table, select the table, then click the Format Table button from the Subsection Details Panel to open the Format Table pop-up form.

To use the Format Table pop-up form:

Use the left-hand side of the form to add subsections to the Selected Columns area. See the Standard Tables section for additional details.

In the Table Properties section, hover over the Document Language section to see a list of available languages.

Select all desired languages using the corresponding checkboxes.

Select all desired languages using the corresponding checkboxes.

Click the Select button to apply selections.

Click the Select button to apply selections.

The selected languages now appear in the panel.

The selected languages now appear in the panel.

Conglomerate list

A Conglomerate is a master product comprised of the most severe product attributes and most conservative formulation percentages. See BoM reference for more details.

Add a Conglomerate List subsection to view a list of the products that were used to create the conglomerate product. If the product is not a conglomerate product, the Conglomerate List subsection collapsed.

Conglomerate table

Conglomerate Tables display attributes associated to the products within a conglomerate.

The attributes are not editable in the table.

If no attributes are listed, the table collapsed.

To edit a Conglomerate table:

Select the table, then click the Format Table button from the Subsection Details Panel to open the Format Table pop-up form.

Use the left-hand side of the form to add subsections to the Selected Columns area. See the Standard Tables section for additional details.

Two Columns – Display the table in two columns.

Product ID – Display product IDs in the table.

Product Name – Display product names in the table.

Space

The Space subsection adds white space between subsections.

From the Add Subsection form, select Space from the Subsection type dropdown menu to add a space to the document.

Page break

The Page Break subsection adds a page break in the document.

From the Add Subsection form, select Page Break from the Subsection type dropdown menu to add a page break to the document.

XGROUP

XGROUPs allow for the combination of two or more data codes. To use XGROUP functionality, the data code XGROUP must be present in the database.

XGROUPs can contain both a WERCS Studio reserved family and custom add-on family.

Assign phrases from each family and reorder the phrases between them. XGROUPs display on the document canvas and in printed documents as if they are a single data code.

To edit XGROUP subsection:

First add the subsection to a document.

Double-click on the subsection to open the Format Table form.

Use the left-hand side of the form to add subsections to the Selected Columns area. See the Standard Tables section for additional details.

Caption

A caption is the phrase that is displayed before the data.

To add a caption, click the Search icon and select a subsection.

Add Phrases

To add phrases:

Double-click a phrase to add it to the family.

Click and drag the phrases to reorder.

Navigate to each data code added to the XGROUP using the navigational tabs to add additional phrases.

Done one of the following:

Click Save to save changes.

Click Cancel to cancel.

Click Previous to move to the previous subsection.

Click Next to move to the next subsection.

Line

The Line subsection adds a solid line in the document.

From the Add Subsection form, select Line from the Subsection type dropdown menu to add a solid line to the document.

For more information, please visit: https://wercs.helpdocsonline.com/reserved-subsections

Repeating Datasets

Building and managing repeating datasets for complex data

Use Repeating Datasets to manage complex product or component data in list or matrix formats. These datasets are linked to subsections with either Repeating Product Datasets (RPDS) or Repeating Component Datasets (RCDS) usage types.

Tool access

Ensure the document contains a subsection with RPDS or RCDS usage type.

Click the Repeating Datasets icon on the Authoring toolbar.

Note : Repeating datasets can be formatted to hide the title of the dataset on document preview and published documents. Select the dataset and click the Format Table button. Select the Hide Title checkbox. The title is still on the canvas.

Dataset Manager overview

The Dataset Manager pop-up form includes two sections:

Dataset : Displays existing datasets.

Dataset Members : Displays subsections assigned to the selected dataset.

Follow these steps to create a new dataset.

In the Dataset pop-up form, enter the following: Number : Automatically assigned dataset code. Description : Internal reference. Content Type : Define whether the dataset contains product (alias) or component data. Once a dataset is created, Content Type cannot be edited. Display Type : Define whether the dataset is displayed in a list or matrix on documents. Linked Subsection : Define the link between an RPDS/RCDS subsection in the format and this dataset. Each RPDS/RCDS subsection should be linked to one dataset only.

In the Dataset pop-up form, enter the following:

Number : Automatically assigned dataset code.

Description : Internal reference.

Content Type : Define whether the dataset contains product (alias) or component data. Once a dataset is created, Content Type cannot be edited.

Display Type : Define whether the dataset is displayed in a list or matrix on documents.

Linked Subsection : Define the link between an RPDS/RCDS subsection in the format and this dataset. Each RPDS/RCDS subsection should be linked to one dataset only.

Click Save to create the dataset. Click Close to exit.

Click Save to create the dataset. Click Close to exit.

Adding dataset members

Dataset members are subsections that hold data. Each subsection can only be used once per dataset.

In the Dataset Members pop-up form: Subsection – Click on the Search phrase families icon to add a subsection. Usage – Select a usage type from the dropdown menu. Available usage types are limited by the dataset type.

Subsection – Click on the Search phrase families icon to add a subsection.

Usage – Select a usage type from the dropdown menu. Available usage types are limited by the dataset type.

Click Save to add the member. Click Close to exit.

Reordering dataset members

Right-click on a dataset member and select Reorder .

Click Save to apply changes. Click Cancel to exit.

Viewing associated data

After creating a dataset and assigning members, view the associated product or component data.

Use the Dataset dropdown to toggle between datasets.

Associated data appears in the bottom section of the form.

For more information, please visit: https://wercs.helpdocsonline.com/repeating-datasets

Power Entry

Welcome to Power Entry

The Power Entry module in WERCS Studio enables streamlined product data entry using preconfigured Subformats. It guides users through question-based forms, enabling consistent and efficient data population without requiring prior training.

Using Power Entry, you can:

Enter product data into Subsections using intuitive, guided forms.

Follow a linear workflow to complete the data entry process.

Customize configuration settings to control the layout and behavior of the application.

Key Functional Areas

This module includes the following functional areas:

Configure Power Entry Settings – Define layout, behavior, and display options for the Power Entry interface.

Create and Manage Subformats – Build and maintain the question-based forms used for product data entry.

Enter Product Data Using Power Entry – Populate product records by completing guided Subformat forms.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/power-entry

Accessing Power Entry

Accessing Power Entry

Use Power Entry to enter product data using configurable templates in WERCS Studio.

Power Entry Access

From the Authoring menu, select Power Entry .

Power Entry Welcome Form – Main Form

The Welcome Form in Power Entry enables you to configure your data entry session before launching the Main Form.

The Welcome Form is broken out into six areas:

Administration Menu – Manage Power Entry templates or access the Manage Products form.

Data Entry Page Selection – Select a data entry page.

Select Language – Select a document language.

Select a Task – Select a task type.

Task Options – Specify your task type options.

Continue Button – After selecting your options, click this button to go to the Main Form .

For more information, please visit: https://wercs.helpdocsonline.com/accessing-power-entry

Navigating Power Entry Welcom

Navigating the Power Entry Welcome Form

Selecting a Data Entry Page, Language and Task Type

Select one of the following task options: New Product New product from existing product Edit existing product Edit existing product, first overwrite data from selected product

New Product

New product from existing product

Edit existing product

Edit existing product, first overwrite data from selected product

The fields that follow in the Task options section are dependent on which selection you make:

New Product Task

If you select New Product in the Select a task section, the following fields appear in the Task options section:

To automatically populate a Product ID, select the Auto-increment product ID checkbox. Then select an appropriate prefix from the Product ID prefix dropdown menu.

New Product from Existing Product Task

When you select New product from existing product in the Select a task section, the following fields appear in the Task options section:

Click the button to the right of the Select Source Product field, then use the Filtering tool to select an existing source product.

To select a product by composition, click Search by CAS composition .

In the Find Product By Composition dialog, click Add New and use the Filtering tool to select your desired components.

Review selected components in the top section. Matching products containing all selected components appear in the bottom section.

Select a product from the Matching Product section, then click Select Product .

Edit Existing Product Task

When you select Edit existing product in the Select a task section, the following fields appear in the Task options section:

Edit Existing Product, First Overwrite Date from Selected Product Task

When you select Edit existing product, first overwrite data from selected product in the Select a task section, the following fields appear in the Task options section:

Click the appropriate buttons to the right of the Select Source Product and Destination Product fields, then use the Filtering tool to select both a source and destination product.

For more information, please visit: https://wercs.helpdocsonline.com/navigating-power-entry-welcom

Power Entry Administration

Power Entry Administration Options

Administrators must configure the data entry pages of Power Entry for each Subformat.

In the Add – Edit PowerEntry SubFormat dialog, select the checkboxes for additional features you want accessible to users.

To restrict access, select the Subformat in 'Read Only' Mode checkbox.

To hide the XML button, clear the Enable XML Button checkbox. By default, this button is not enabled.

Select a workflow from the Workflow dropdown menu to associate it with the Subformat. Products created are automatically assigned to the selected workflow. Select user types from the Assigned menu. Hold the Ctrl key to select multiple roles.

To edit the form color, click the button to the right of Data entry screen color and select a color from the palette.

Attributes

The Attributes section enables you to control the outcome of each section and edit usage types for each data element.

To run the EU Wizard automatically when the page is completed, select the Run EU Wizard checkbox.

To run a rule group or stream automatically after page completion, select the Rule Stream checkbox (or leave it cleared for a rule group), then click the button to select your desired option.

To associate a workflow task with a section, select a task from the Select a Task dropdown menu.

Usage Types

Each data element is assigned a usage type based on the type of data associated with it. Data entry varies by usage type (for example, list selection or typing a value).

Power Entry supports the following usage types:

PRID – Not editable; hidden during data entry but appears on the final document.

PRDN – Same as PRID.

REVD – Same as PRID; also a date selector.

REVN – Same as PRID.

SUBH – Not editable; displays without editing.

CTXT , CVAL , FVAL , FTXT , REGP , REGC , FLAG , BTXT – Not editable; display or appear on SDS as noted.

DMDY – Date selector.

CMDY – Current date; not editable.

GRPH – Graphic selector.

XGROUP – Multiple phrase selection node; no customization or configurable controls.

URL – Add/edit a URL in a text box.

Option Lists

Option lists can appear as radio buttons or dropdowns. You can only select one option.

Click Edit Options to add new values.

In the SubSection Options dialog, enter the value in the Value field and the display text in the Caption field.

Use the Up and Down buttons to reorder entries.

Click Save .

Resync

If changes have been made to the Subformat template (such as new Sections or data codes added in Power Designer Plus), you must resync the Subformat.

Click Resync .

Administration Settings

You can also adjust your Administration settings.

From the Subformat Administration dialog, click Settings .

In the CDE Global Settings dialog, enter the indicator for rules, the EU Wizard, or workflows in the Run indicator from page fields.

Click the Indicator color area to select a color from the palette.

Enter a label for the XML button in the Button label field.

Select an action from the Action to be performed dropdown menu.

To upload an XSLT file, click Browse , then locate the file in the Explorer window.

Click Save .

For more information, please visit: https://wercs.helpdocsonline.com/power-entry-administration

Data Entry

Entering and Validating Product Data in Power Entry

Use the Main Form in Power Entry to enter product data in a structure that reflects the layout of an SDS.

The Main Form includes the following elements:

Navigational Sections – Navigate to different Sections of the document.

Status – Indicates the status of a data element.

Title – Displays the title of the current Section.

Actions – Lists available data entry actions for a data element.

User Updated – Shows the name of the user who edited a portion of the SDS, along with the time and date of the update.

Progress Indicators

The progress for each Section appears using the following color scheme:

Grey – No data has been entered.

Yellow – Data has been entered but not validated.

Green – Data has been validated.

Edits

PTXT

Single Phrases

You can select some single phrases from a dropdown menu on the data entry page.

You can select other single phrases from the Select Phrase dialog.

Multiple Phrases Select multiple phrases from the Edit Content dialog.

Use the Filtering field to search for a specific phrase.

Double-click a phrase to add it to the top portion of the window.

To reorder phrases, click and drag them into your desired order.

Once you have selected your phrases, click Save . The phrases display in the Main Form with updated user information.

To select a phrase outside the default phrase family, click the button.

Select a phrase from the View Phrase Family dialog.

To create a new phrase, click Add New .

In the Edit Phrase – New Phrase dialog, enter a new phrase in the Translation field, then click Save .

To edit an existing phrase, click Edit in the Edit Content dialog.

XGROUP

XGROUPs appear as a single field with an Edit link.

Clicking the link opens a multiple-phrase PTXT form.

Editing and saving data from this form refreshes the Main Form and displays the data codes as they appear on the final document.

PVAL

PVAL and PTXT Combined

To populate these sections, click Add New . The area is populated with empty fields and Select options.

To enter PTXT data, click the Select link.

In the Dataset Attribute Edit dialog, follow the steps in the PTXT section.

After selecting PTXT options, enter data into the PVAL fields. Data is saved when you click Next or navigate to another section.

GRPH

Selecting a graphic-based data element opens a pop-up.

If an image has already been selected, it appears in the Current Image section.

To search for an image, use the Filter within selected folder field.

Selecting an image displays all data codes associated with it.

Select your image, then click Save .

To upload a new image, click Upload .

In the Upload File dialog, click Browse , then select your file from the explorer window.

After selecting your file, click Save .

Product Formulations

Power Entry enables you to edit the product’s formulation. Additional information is available in the Product Formulation section of Power Author Plus.

Automated Data Entry

You can automatically populate data one page at a time or across all pages.

To complete a page automatically, click Next .

If no data is missing or invalid, the Complete Page dialog displays confirmation. Click Close to proceed to the next page.

If data is missing or invalid, the dialog displays an error. Click Close to return to the section with issues.

To reset the status of all pages to grey, click Reset All .

For more information, please visit: https://wercs.helpdocsonline.com/data-entry

Additional Tools

Alias, Group, Notes, and Publishing Use Tools

Additional Tools

The following tools are available from the Main Form:

Product Aliases – Manage aliases associated with the product.

Product Groups – Manage product groups associated with the product.

Notes – Create notes for the product.

Preview – Preview the SDS.

Publish – Publish the SDS.

Main Menu – Return to the Welcome Form.

Reset All – Reset the status of all tabs to grey.

XML – View the XML code of your document.

Reject Product – If a workflow is assigned, send an email alerting users that the product has been rejected.

Next – Automatically complete the current section.

Complete All Pages – Automatically complete all remaining pages of the SDS.

Managing Product Aliases

Click Product Aliases .

In the New Product Alias dialog:

Enter a description.

Clear the Auto Increment ID checkbox to select a specific Alias ID, or leave it selected, then give the alias a relevant description.

(Optional) Enter values in the Reason and Customer fields for tracking purposes and reporting purposes and do not appear in the document.

Click Save .

Managing Alias Attributes

Use the Filtering tool to select a Subsection.

Select your desired attributes and click OK .

Managing Product Groups

Click Product Groups .

Use the Filtering tool to select a product.

Adding Product Notes

Click Notes .

In the Product Notes dialog, enter your note in the New Notes field.

Previewing the Document

Click Preview .

In the Format/Subformat dialog, select a Format and Subformat.

Click the button to view available Subformats within a Format.

Select your language from the dropdown menu.

Click Preview to open the Document Preview dialog.

Rejecting a Product

Click Reject Product .

In the Product Rejection dialog, enter your email subject in the Subject field.

Enter your message in the Email Body field.

Select recipients by checking the associated boxes.

Click Save to send the email.

Publishing Documents

Click Publish .

In the Current Document dialog, review the selected product, Format, Subformat, and language.

Select options to suppress trade secrets or hide aliases by checking the appropriate boxes.

Plant – Select the plant for the document.

Web Availability – Choose Intranet Viewer, Internet Viewer, Both Viewers, Orders Interface, or Not Available.

Authorize Formula and Attributes – Authorize both formulation and attributes. Optionally apply to all Subformats.

Queue Instead of Publishing Immediately – Send the job to the Job Queue.

Clear RFR After Publishing – Clear Reason for Revision after publishing.

Do Not Unauthorize Previous Documents – Maintain multiple authorized versions.

Managing Revision Data

From the Current Document dialog, click Manage Revision Data .

In the Manage Revision Data dialog, select your desired Subformat’s checkbox.

Click Update .

When the confirmation message appears, click OK .

Publishing Tools

The Current Document dialog includes the following publishing tools:

Preview Document – View the document before publishing. Click the Preview icon to open the Document Preview dialog. From this form, you can print, email, or save the document.

Preview Document – View the document before publishing.

Click the Preview icon to open the Document Preview dialog.

From this form, you can print, email, or save the document.

View Data Ownership Report – Displays all data added by users or functions. Click the View Data Ownership Report icon to open the report dialog. Click Print Report to print the report.

View Data Ownership Report – Displays all data added by users or functions.

Click the View Data Ownership Report icon to open the report dialog.

Click Print Report to print the report.

Validate Document – Identifies missing phrases, translations, or required data. Click the Validate Document icon to open the validation report. If all required data is present, a confirmation message appears.

Validate Document – Identifies missing phrases, translations, or required data.

Click the Validate Document icon to open the validation report.

If all required data is present, a confirmation message appears.

Publishing Options – Publish in a specific format or all formats. Select your publishing options, then click the icon for your desired format.

Publishing Options – Publish in a specific format or all formats.

Select your publishing options, then click the icon for your desired format.

Show Publisher – Opens the Document Publisher dialog.

Show Publisher – Opens the Document Publisher dialog.

Merge Documents – Opens the Merge Documents dialog.

Merge Documents – Opens the Merge Documents dialog.

ES Publisher – Opens the ES Publisher dialog.

ES Publisher – Opens the ES Publisher dialog.

List of Published Documents – Opens the Published Documents dialog. Use the navigational tabs to view documents by format.

List of Published Documents – Opens the Published Documents dialog.

Use the navigational tabs to view documents by format.

For more information, please visit: https://wercs.helpdocsonline.com/additional-tools

Regloader Browser

Welcome to RegLoader/Browser

RegLoader/Browser is a tool used to view and load regulatory data into your WERCS Studio system, helping you determine regional regulatory obligations. It supports mapping, filtering, and analysis of regulatory datasets for streamlined compliance management.

With the RegLoader/Browser, you can:

Map regulations into the WERCS Studio database

Mask datasets to view only relevant information

View which components are attached to ChemADVISOR regulations

Access multiple reporting and loading tools

Key Functional Areas

Regulation Mapping – Load and integrate regulatory datasets into the WERCS Studio database.

Dataset Masking – Filter datasets to display only relevant regulatory information.

Component Association – Identify which components are linked to ChemADVISOR regulations.

Reporting and Loading Tools – Access a suite of tools for regulatory data analysis and import.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Contents

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For more information, please visit: https://wercs.helpdocsonline.com/regloader-browser

Accessing Regloader

For more information, please visit: https://wercs.helpdocsonline.com/accessing-regloader

Regloader

For more information, please visit: https://wercs.helpdocsonline.com/regloader

Regloader Tools Menu

Use Tools for Loading, Reviewing, and Reporting Regulatory Data

Load Chemical Name Translations

This tool enables you to load component translations from the ChemADVISOR database into WERCS Studio.

To use this functionality, the Special field on the New Language format must be populated with the correct Language IDs.

Access the New Language format from either the Translation Manager or Administrator modules.

To load chemical name translations, from the Tools menu, select Load chemical name translations . The following pop-up opens:

Select a processing option to load chemical name translations for all chemicals, translations for a specific CAS, or translations for a specific language code.

Select the Override ownership checkbox to override any manually entered component name with a ChemADVISOR-linked translation.

Select a component synonym position from the Name type to load from the dropdown menu or use the default: Master Formulation Name

Click See Full List button to open the Full List Language format to view language information.

Click OK to load chemical name translations based on the options selected, or click Close to cancel.

After clicking OK , a pop-up opens. Click OK to proceed or Cancel .

When chemical name translations are loaded successfully, a message stating the number of components updated appears.

Show Regulations for a Component

In the Actions pop-up, choose a search method: WERCS Component – Select a component present in WERCS Studio only. Click the Search button and use the Filtering tool to select a component. Any CAS – Enter a CAS number in the provided field to view matching components. Click the Show button. Component Name – Select a component present in WERCS Studio or ChemADVISOR database. Select Component Name and click on Show button. Use the Filtering tool to select a component.

In the Actions pop-up, choose a search method:

WERCS Component – Select a component present in WERCS Studio only. Click the Search button and use the Filtering tool to select a component.

Any CAS – Enter a CAS number in the provided field to view matching components. Click the Show button.

Component Name – Select a component present in WERCS Studio or ChemADVISOR database. Select Component Name and click on Show button. Use the Filtering tool to select a component.

Review All Mappings

This tool provides the ability to view existing maps between ChemADVISOR database and WERCS Studio. To review mappings:

To print the report, click the Print button in the top right corner.

To print the report, click the Print button in the top right corner.

Additional Load Options

This tool provides options for running mapped regulations against components.

In the pop-up window, choose one of the following:

In the pop-up window, choose one of the following:

Run against one CAS number – Click the Search button to select a component. You can select the Load selected component ID only checkbox to only load data for the selected CAS/Component ID combination.

Run against ALL CAS numbers – Select the option to run mapped regulations against all components in the database.

Run against a File of CAS numbers – Select the option, then click Browse to upload a desired file.

Optional : Use the Format dropdown menu to select Format(s). Choosing this action loads CTXTs only for the selected formats.

Example:

There are two maps to the same regulation.

Map 1 loads MTR CTXT CTXT0001

Map 2 loads JPN CTXT CTXT0002

If only Japan is selected, only CTXT0002 is loaded.

For more information, please visit: https://wercs.helpdocsonline.com/regloader-tools-menu

Mapping

Map ChemADVISOR Regulations to WERCS Studio Subsections

A mapping is the link between a ChemADVISOR regulation and a WERCS Studio regulation. Creating a regulation map enables the transfer of ChemADVISOR regulatory data into WERCS Studio for further use in other modules.

There are four ways to map ChemADVISOR data into WERCS Studio:

One regulation to one subsection.

One regulation to multiple subsections.

One regulation with multiple data maskings to one subsection.

Multiple regulations to one subsection.

Mapped data appears throughout the WERCS Studio system, including:

Regulatory Tracking

Rule Writer

Power Author Plus – Data Value Review

SDS Display

Creating a Mapping Sequence

The Formats dropdown displays a list of formats that restricts maskings/mappings to only those present in the selected format/s. Items 2–4 describe adding and editing subsections .

Click the top New button to create a new WERCS Studio regulation (subsection) to be mapped. The Regulations - New pop-up opens:

Enter a Subsection code in the Regulation Code field.

Click the Folder icon to select a subsection.

The Select subsection pop-up opens, displaying subsections as they exist in the Regulatory Tracking module.

Click the Allow content sync checkbox to allow overwrites of all mapping and masking elements associated to datacode, except for selections that remain active in Datacode and List (General) settings.

Clear the checkbox to allow edits to be made and prevent overwrite during next content sync.

Each mapping sequence number and list name appear in the dropdown menu. The corresponding mapping name displays in the free text field.

After adding or editing a mapping name, click Save name to save the change.

Select the Delete map button to delete any mapping sequence except

The DataCode Settings section contains two options:

Override ownership – Override any data that already exists for the listed components in the WERCS Studio database. If this is the first time a regulation has been mapped, there is no information to override.

Load Multiple numerics as a single value – Select to take only the min or max value from any sets of values/ranges. This option should only be used for List ID 571 Toxicology Data - Selected LD50s and LC50s. Column @3 must have numeric data to use this option. Selecting this option impacts system performance as it tries to convert a large amount of data.

The List Settings section contains three options:

Load generics – Load any linked generic component data associated with the selected regulation.

Load duplicate values – Load all duplicate values.

Adjust When Only Numeric Value on Load – Select to load only the Min or Max value of the dataset.

Additional options may be available depending on settings and list priorities:

Use unit conversion – You must select this checkbox to utilize unit conversions.

Inhalation Conversion Settings – Converts inhalation units to desired specifications.

Physical State – If selected, loads data only for components matching the selected physical state. Controlled by the REGLOADER > PHYSICALSTATES application setting,

The bottom portion of the Mapping form contains the following options:

Mapped regulations are displayed in the grid by:

Regulation (name),

(List) ID

Map (sequence number)

Mask (existing maskings).

A Sync column appears if multiple ChemADVISOR regulations are mapped to a single WERCS Studio regulation.

Note: To map multiple ChemADVISOR regulations to a single WERCS Studio regulation, complete the mapping steps above, selecting the same WERCS Studio subsection for each mapping.

Click Load to load the ChemADVISOR list data into the Studio regulation.

Note: Masking requirements to manipulate the list data may be required.

Click Cancel to cancel all changes and close the window.

To complete the entry, do one of the following:

Click Delete to delete a mapped regulation.

Click Save to save all changes.

To data from a customized set of CAS numbers, select the Select CAS from file checkbox.

The file must be a .txt file with a comma-delimited list of CAS.

Use the Select file name containing CAS number(s) to load pop-up field to select a file to load.

For more information, please visit: https://wercs.helpdocsonline.com/mapping

Masking

Create and Apply Data Masks for Regulatory Loads

A Data Mask enables you to manipulate ChemADVISOR regulations during the load process into WERCS Studio. Data masks control which data columns are loaded and how the data is displayed. It is recommended to create data masks only for mapped regulations . See Map ChemADVISOR Regulations to WERCS Studio Subsections .

ChemADVISOR data is structured in columns. Masking allows you to customize which columns are loaded and how they appear in Studio. Only one mask can be created per mapping. There are three types of data mask functions:

Simple Masking – A mask applied to a single mapping.

Loading Phrases – Load a specific CTXT phrase when masked data is loaded.

Conditional Masking – Use column indicators to load data that meets specific conditions.

Masking Overview

When viewing a component list, the data masked version of the values is displayed by default.

Masking uses the Column IDs from the raw data to define which elements display and load into Studio.

Create a Simple Data Mask

To create a conditional mask:

The Data Mask form opens. It contains the necessary elements to build a new data mask. Use the top portion of the format to build a Simple data mask: Select a Map Number from the dropdown. Click the Search icon to select Column IDs. Only columns containing data can be added to the data mask.

The Data Mask form opens. It contains the necessary elements to build a new data mask. Use the top portion of the format to build a Simple data mask:

Select a Map Number from the dropdown.

Click the Search icon to select Column IDs.

Only columns containing data can be added to the data mask.

The data now displays only the selected columns.

Click Save at the bottom of the format to finalize the mask.

Click Save at the bottom of the format to finalize the mask.

Linkage

The Loading Phases function in the Linkage section enables you to load existing CTXT phrases in addition to loaded component data.

We recommend that the mapped subsection and the selected CTXT subsection be the same to avoid potential data conflicts.

The Impact Analysis form indicates potential data conflicts for a data load.

To configure linkage:

Select a Format , Subsection , and Phrase using the Search icons.

Create a Conditional Data Mask

Conditional masking uses column indicators to load only data that meets defined criteria.

Navigate to the Conditions section of the Data Mask form.

Navigate to the Conditions section of the Data Mask form.

Select OR or AND from the dropdown.

Select OR or AND from the dropdown.

Click the Add Condition Group icon.

Click the Add Condition Group icon.

For each condition, select a Column , and choose an Operator .

Is

Is Not

Like %

Not Like %

Exists

Does Not Exist

Enter a Value, then use the Plus and Minus icons to add or remove conditions.

Click Save to finalize the conditional data mask.

Generic Components

The Generic Components section enables you to assign a Subsection and phrase for generic components when conditional mapping requirements are met.

After selecting the phrases:

Click Save .

Impact Analysis

Welcome to Regulatory Data Impact Analysis

Regulatory Data Impact Analysis continuously monitors the ChemADVISOR database for changes to local data and provides an impact analysis report that explains changes to your component data. It enables proactive decision-making by identifying affected components and products before regulatory updates are applied.

With Regulatory Data Impact Analysis, you can:

View update indicators from various KPIs when differences are detected between the current regulatory data and the most recent ChemADVISOR data

View the components and products that would be impacted by a ChemADVISOR load before the load is executed

Filter the impacted components by various criteria to control the exact composition of a ChemADVISOR load

Create a Product Group of all the impacted products to perform future bulk actions, such as re-running rules, wizards, and publishing

Key Functional Areas

KPI Monitoring – Detect and display update indicators when regulatory data changes are identified.

Impact Preview – Identify affected components and products prior to executing a ChemADVISOR load.

Load Filtering – Apply filters to control which impacted components are included in the regulatory load.

Product Group Creation – Generate a Product Group of impacted items for bulk processing and publishing actions.

Create a Product Group of all the impacted products to perform future bulk actions, such as re-running rules, wizards, and publishing.

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For more information, please visit: https://wercs.helpdocsonline.com/impact-analysis

Accessing Impact Analysis

Accessing Impact Analysis

Impact Analysis provides a breakdown of the component data that would be updated by importing new ChemADVISOR data. Filtering by various criteria enables you to control the exact composition of a data load.

Tool Access

You can access Impact Analysis from two locations:

Main Form

The Impact Analysis form includes tools and filters that help you:

Review component-level changes before importing ChemADVISOR data.

Apply filters to refine the scope of the data load.

Assess the impact of updates across multiple products or components.

Let me know if you'd like this exported or if you're ready to move on to the next topic!

For more information, please visit: https://wercs.helpdocsonline.com/accessing-impact-analysis

Change Indicators

Interpreting Change Indicators in Regulatory Data

Impact Analysis continuously monitors the ChemADVISOR database for regulatory changes and compares any detected changes against the current system data. If differences are detected, notifications display at various locations throughout Studio.

Dashboard Change Indicators

Change indicators appear directly on the Dashboard, accessed from the Management menu by selecting Dashboard .

KPI Widgets can be configured to display ChemADVISOR-related data based on defined component criteria, Within each graph, select a Graph Segment to view components matching that segment's criteria.

Power Designer/Author Plus Change Indicator

The Magnifying Glass icon appears to the right of the Product Selector in Power Designer/Author Plus if the selected product contains components with detected data differences.

Clicking the icon opens a pop-up of the Impact Analysis help, filtered to list only components in the selected product.

After completing your actions, close the pop-up to return to Power Designer/Author Plus without disrupting your workflow.

The Magnifying Glass icon also appears on the Product Formulation help, to the right of the Product Selector, if the selected product contains components with detected data differences.

Clicking the icon opens a pop-up of the Impact Analysis help, filtered to list only components in the selected product.

After completing your actions, close the pop-up to return to Formulation help without disrupting your workflow.

Change Detection

The Impact Analysis help displays Change Detections when updates affect component data in the Analysis Grid. Notification triggers include:

Component data, text, or regulation changes

Map or Mask changes

New ChemADVISOR quarter update

Application Setting changes

When a trigger occurs:

A Warning Notification appears at the top of the grid when the help loads or refreshes.

A background job runs nightly to process comparison updates.

After the background process completes:

A Finished Notification appears, indicating the help needs to be refreshed.

For more information, please visit: https://wercs.helpdocsonline.com/change-indicators

Regulatory Data Impact Analysis Help

Using Help Resources for Navigating Impact Analysis

The Impact Analysis help provides a comprehensive comparison between the current component data loaded to your Studio environment and the available data in the ChemADVISOR database. Each listed component in the Impact Analysis contains a difference in data. From this help, impacted components can be filtered by various criteria to control how data is loaded.

Principal Areas of the Help

The Impact Analysis help is organized into three main functional areas:

Main Toolbar — Access various Impact Analysis tools.

Main Toolbar — Access various Impact Analysis tools.

Send to Job Queue Button — Submit a job to the Job Queue to execute the ChemADVISOR load.

Send to Job Queue Button — Submit a job to the Job Queue to execute the ChemADVISOR load.

For more information, please visit: https://wercs.helpdocsonline.com/regulatory-data-impact-analysis-help

Main Toolbar

Using the Main Toolbar to Navigate and Control Impact Analysis

This section details the main tools available in Impact Analysis.

Main Toolbar Tools

Displays the Product ID and Product Name for all products containing components from the Analysis Grid that meet the Will Load requirements.

Right-click a product to access Notes or Related Documents .

Displays a filtered history of all product groups created from a ChemADVISOR data load.

The file is saved to File Manager , and a pop-up confirms the export.

Up to ten export files can be stored on the server.

For more information, please visit: https://wercs.helpdocsonline.com/main-toolbar

Analysis Grid Overview

Reviewing and Understanding the Impact Analysis Grid

Grid Structure and Columns

The Analysis Grid is sorted by data code: CAS , Component ID . It includes the following columns:

CAS Number – Component CAS number.

Component ID – Component ID in Studio.

Component Name – Component name in Studio.

DataCode – Datacode mapped to a ChemADVISOR list.

Current Data – Current data in Studio.

New Data – Masked regulatory data to replace current data.

Other Changes – Yes/No – Indicates if there are additional CTXT or Regulation Linkage changes.

Results – Add, Delete, Update – Describes the type of change. The type of change is derived from CVAL, CTXT and Regulation linkage changes. If the component has the same CVAL data in both the Current and New data columns, but has CTXT changes, Update displays in Results column.

Will Load? – Displays a red X or green checkmark icon indicating whether the data would load if submitted to the Job Queue. Hover on the icon to display additional information.

Postponed? – Select to prevent overwriting current data in future loads. Use the top checkbox to postpone up to 10,000 records. Postponed components are hidden until the checkbox is cleared. To view postponed items, set the Postpone Flag filter to Yes in the Filter help.

Use the top checkbox to postpone up to 10,000 records.

Postponed components are hidden until the checkbox is cleared.

To view postponed items, set the Postpone Flag filter to Yes in the Filter help.

Note: Postponing is an alternative to marking a component as Skipload elsewhere in the system.

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Viewing Masked Data Details

Items with a green background passed the mask filters.

Items with a green background passed the mask filters.

The Generic ID column identifies the generic parent (RR number) from which the data is derived.

The Generic ID column identifies the generic parent (RR number) from which the data is derived.

Hover over the Question Mark icon to view additional details: DataCode – Datacode to which the component is mapped. Data Mask – Mask sequence number. Click to open the Data Mask help (mapping cannot be changed here). See section 2.8 Masking . List ID – ChemADVISOR list ID. List Name – ChemADVISOR list name. Region and Categories – As defined in RegLoader/Browser. Mask – Mask information from the Mask help. Filter – Conditions applied to the data mask. Unit Convert to , Time Convert to , Adjust Numeric , Physical State – Displays selected mapping information.

Hover over the Question Mark icon to view additional details:

DataCode – Datacode to which the component is mapped.

Data Mask – Mask sequence number. Click to open the Data Mask help (mapping cannot be changed here). See section 2.8 Masking .

List ID – ChemADVISOR list ID.

List Name – ChemADVISOR list name.

Region and Categories – As defined in RegLoader/Browser.

Mask – Mask information from the Mask help.

Filter – Conditions applied to the data mask.

Unit Convert to , Time Convert to , Adjust Numeric , Physical State – Displays selected mapping information.

The Other Changes Column

The Other Changes column indicates whether CTXT or Regulation Linkage changes exist for the component.

Displays Yes if either change type is detected.

Hovering over Yes reveals a breakdown of detected changes, each marked Yes or No .

The Will Load? Column

The Will Load? column provides a quick view of the load status for preloaded ChemADVISOR data.

Icons indicate load status: ■ All data will load ■ No data will load ■■ Partial data will load

■ All data will load

■ No data will load

■■ Partial data will load

Hovering over the icon displays:

A summary statement about load eligibility.

If the data owner is Customer , the username on the comp data record is shown.

Current Owner – Displays the current data owner. With proper permissions, this can be changed: WERCS Customer Skipload

WERCS

Customer

Skipload

For more information, please visit: https://wercs.helpdocsonline.com/analysis-grid-overview

Submitting Data To Be Loaded

Submitting Reviewed Data for Loading into WERCS Studio

Executing the regulatory data load overwrites the current regulatory data with the new masked ChemADVISOR data for all the currently listed components that meet the Will Load? requirements.

At job submission, a product group can be created that contains all products affected by the data load.

This enables you to perform actions on these products after the load has finished.

The Impact Analysis – Send to Job Queue WebPage Dialog opens:

Restrict load to Masks with these formats – This dropdown menu enables the load to be limited to specific formats.

Create a Product Group of the affected Products – Select this checkbox to create a product group containing all the products that are impacted by the load. After selecting the checkbox, a name for the group can be entered in the provided text field. By default, the group name is LOLI Update - the current date.

For more information, please visit: https://wercs.helpdocsonline.com/submitting-data-to-be-loaded

Regulatory Tracking

Welcome to Regulatory Tracking

Regulatory Tracking allows you to create and maintain regulatory reporting and compliance requirements for your products and components. It supports automated compliance checks and SDS population based on mapped or user-defined data.

With Regulatory Tracking, you can:

Manage a list of industry-specific or user-defined regulation categories and all the regulations in each category

Set compliance on regulations and attach products or components to a specific regulation

Automatically determine the compliance of orders or shipments against all regulations and pertinent usage totals for certain parameters via the Transaction Monitoring process

Automatically populate certain Subsections on your SDS with user-created data or mapped data from a Regulatory Subscription

Key Functional Areas

Regulation Management – Create and organize regulation categories and individual regulations for tracking purposes.

Compliance Assignment – Set compliance status and link products or components to specific regulations.

Transaction Monitoring – Automatically evaluate order and shipment compliance against all applicable regulations and usage thresholds.

SDS Subsection Population – Populate SDS subsections using mapped subscription data or custom user-defined entries.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/regulatory-tracking

Accessing Regulatory Tracking

Accessing Regulatory Tracking

Regulatory Tracking enables you to manage and monitor regulatory compliance data within WERCS Studio. This module supports automation of SDS content and integration with regulatory subscriptions such as LOLI.

Tool Access

Main Form

Regulatory Tracking opens with the Regulations Manager tab selected. The form is divided into four functional areas:

Regulation Categories – Displays user-defined regulation categories.

Regulations in the Category – Lists regulations within the selected category.

Navigational Tabs – Access additional tools within Regulatory Tracking.

Additional Tools – Search for regulations, set compliance, and attach products or components to specific regulations.

Document Automation

Regulatory Tracking enables automatic population of SDS Subsections using either user-created data or mapped data from a regulatory subscription (e.g., LOLI). To enable automation. Your SDS must include one or both of the following:

REGC (Component Regulation) – Displays compliance values for each component in the selected product.

REGP (Product Regulation) – Displays a compliance statement for the selected product.

The statements used on the SDS are from the phrases, defined by the regulation, added to your database as a result of running a regulatory load (For example, LOLI), which include a description of the regulation and the following statements:

Y phrase – Compliance

N phrase – Non-compliance

The Subsection name and ID in the Format must match the Regulation ID in Regulatory Tracking.

Adding regulations via the Regulation Update form, or a Regulatory Subscription (for example, LOLI), automatically creates a Subsection with the same name and ID as the regulation, although it still has to be placed in the format.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-regulatory-tracking

Regulation Manager

Create and Manage Regulation Categories and Rules

Use the Regulation Manager to manage industry-specific or user-defined regulation categories and the regulations within each category. This tool enables you to group regulations, define compliance rules, and associate products or components with specific regulations.

Adding Regulation Categories

Use the Regulation Categories section to organize regulations into user-defined groups.

The Regulations Category – New Webpage Dialog opens.

Enter a two-digit code and a description.

Adding Regulations to Categories

Create regulations that define and restrict individual products or components based on industry standards or by user or site-specific requirements.

Select multiple categories by checking the appropriate checkboxes (your selected category is selected by default).

Enter a regulation code in the Code field, and a description in the Description field.

B – Complies : Complies only if all components are listed. A product must have components and all the components in the formulation must comply with the regulation to be in compliance (for example, the international inventory lists: DSL, EINECS, and TSCA). A Rollup runs daily, and/or on request.

C – List of component values : Only applies to components (for example, ACGIH OELs and LC50/LD50). A Rollup is not performed.

D – Applies to products for GTTM : Only applies to products (for example, PROP-65). Rollup is not performed.

E – Applies to either components or products for GTTM : Applies to either components and/or products, and there is no automatic relationship between the products and components when attached to the regulation (for example, FDA regulations). A Rollup is not performed.

F – Component thresholds for locations for GTTM : Applies to components and their relationships to locations and customers and is usually used in conjunction with Usage Totals to make comparisons to thresholds. There is no automatic relationship between the products and components when components are attached to the regulation. A Rollup Is not performed. For example, recording the maximum amount of a given component that may be shipped to Canada in a particular year.

N/A – Default (Not applicable)

1 – No Effect on Transactions: The Transaction Monitor overlooks the regulation and has no effect on any transaction. Used for both informational and SDS purposes

2 – Special Instructions Printed: Print Special Instructions (text phrases or cover letters) along with the transaction when the regulation applies or the product does not comply with the regulation (that is, PROP-65 may use this feature

to advise shipping to re-label a product).

3–9 – Stop Order Entry: Stop the transaction from completing if a product does not comply with the regulation.

Select a Distribution List from the dropdown. The lists are used by the transaction monitoring process to email a group if regulations are violated during a transaction. Each regulation can have its own list.)

Click Save .

Removing Multiple Regulations

Use the Remove Multiple feature to delete several regulations at once.

The dialog opens. Select the checkboxes for the regulations to remove.

Finding Regulations

Use the Find Regulation feature to locate specific regulations.

Managing the Product Attach List

Manually override compliance using: Reg Comply Type – Primarily used for products imported via 3rd parties (DTE) that came in with a previously existing red flag. Reg Override Type – Override the Reg Comply Type selection. This is used primarily to allow the original comply type status without modifying the Reg Comply Type.

Reg Comply Type – Primarily used for products imported via 3rd parties (DTE) that came in with a previously existing red flag.

Reg Override Type – Override the Reg Comply Type selection. This is used primarily to allow the original comply type status without modifying the Reg Comply Type.

Click Save .

To associate data with the selected product, click Compliance .

The (Selected Regulation) Webpage Dialog opens.

Click Browse… and select the file from the Explorer window.

Click Process .

Managing Compliance Data

Compliance Data is used with the Transaction Monitoring Process and can also be referenced via a REGC Subsection on an SDS. Compliance Data can be stored at the following levels:

Component level – Data is associated with each component on the Component Attach List for a regulation.

Product level – Data is associated with each product on the Product Attach list for a regulation.

Regulation level – Data is associated with the regulation, such as countries, states, or customers.

Click Compliance .

The Compliance – New Webpage Dialog opens.

Use the Compliance Data field to load values such as TLVs or STELs.

Selecting the Compare Not-On-List checkbox indicates that the values listed in the Compliance Data field are concerned with the regulation, and the Transaction Monitoring Process does not use the values to evaluate the transaction.

Use the Special Instruction field to select a phrase or cover letter to print when a regulation is violated or if Transaction Effect is set to 2 (Special Instructions Only).

Managing the Component Attach List

Click the button to move them to the Selected Components section, then click Select .

Click Compliance to associate data with a selected component.

Managing the Skip List

In the Components attached to regulation Webpage Dialog , use the Skip List function to exclude specific components from being loaded into a regulation when importing from a Regulatory Loader.

(Optional) Click Upload to attach a file of components: The (Selected Regulation) Webpage Dialog opens. Click Browse… and select your file. Click Process .

The (Selected Regulation) Webpage Dialog opens.

Click Browse… and select your file.

Click Process .

For more information, please visit: https://wercs.helpdocsonline.com/regulation-manager

Regulation Matrix

Analyze Product and Component Compliance in the Regulation Matrix

Use the Regulation Matrix to understand how a product and each of its components relate to all regulations within a selected category. This tool enables you to assess compliance across multiple regulatory frameworks in a single view.

Accessing the Regulation Matrix

Begin by accessing the Regulation Matrix from the appropriate tab in the application.

Tool Access

The Regulation Matrix form appears.

Main Form

Use the following steps to configure and view compliance data:

Click the button next to the Product field to use the Filtering tool to select a product.

Select a category and model from the dropdown menus.

Select the View name checkbox to display the chemical name alongside the CAS number.

Click the button next to the Language field to select language for display of the chemical names in the Matrix. If a translation is unavailable for a chemical, the name defaults to English.

Understanding the Matrix Results

The following sections describe how to interpret the results displayed in the Regulation Matrix.

This section displays how the selected product pertains to each regulation in the category. Values are automatically determined by the rollup process for regulations with processing type A or B. Possible values include:

OK

Not OK

Applies

Click Legend .

Exporting or Printing Results

To print or export the matrix results:

To print the matrix results, click Print.

For more information, please visit: https://wercs.helpdocsonline.com/regulation-matrix

Regulation Bypasses

Apply Bypasses to Override Regulation Failures

Regulation bypasses enable a product to pass a regulation it would otherwise fail. These exceptions are applied at the component level within a specific product and are primarily used for regulations with Processing Types A and B , though they can also be applied to other types for transaction processing purposes.

Accessing the Regulation Bypass Form

Use the Regulation Bypasses form to view and manage bypasses for selected products.

The Regulatory Tracking form displays a list of products on the left and any associated bypasses in the Regulation By Bypasses section on the right.

Adding a Regulation Bypass

To apply a bypass to a product:

The Regulation By-Pass – New Webpage Dialog opens. Select a component from the product formulation using the CAS Number dropdown.

The Regulation By-Pass – New Webpage Dialog opens. Select a component from the product formulation using the CAS Number dropdown.

Select a regulation from the Regulation dropdown.

Select a regulation from the Regulation dropdown.

In the Reason field, enter a reason for the bypass

In the Reason field, enter a reason for the bypass

Select the Applies to MSDS checkbox if the bypass should be used to generate the Compliance statement (Y phrase) for the selected regulation on the SDS.

Select the Applies to MSDS checkbox if the bypass should be used to generate the Compliance statement (Y phrase) for the selected regulation on the SDS.

For more information, please visit: https://wercs.helpdocsonline.com/regulation-bypasses

Regulations For Products

For more information, please visit: https://wercs.helpdocsonline.com/regulations-for-products

Translation Manager

Welcome to Translation Manager

The Translation Manager is a phrase library management and migration tool enabling you to process phrases from external sources into internal systems. It supports multilingual environments by centralizing phrase creation, editing, and import workflows.

With Translation Manager, you can:

Create, edit, and copy phrases

Manage phrase families

Import external phrases

Add new languages

Key Functional Areas

Phrase Management – Create new phrases, edit existing entries, and copy phrases across languages or families.

Phrase Families – Organize phrases into logical groups to streamline management and reuse.

External Phrase Import – Bring in phrases from external systems or files for centralized processing.

Language Support – Add and manage multiple languages to support global deployments.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

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Contents

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For more information, please visit: https://wercs.helpdocsonline.com/translation-manager

Accessing Translation Manager

Accessing Translation Manager

Translation Manager Access

From the Authoring menu, select Translation Manager .

Translation Manager Main Form

Navigational menus – Navigate to additional tools and settings.

Navigational menus – Navigate to additional tools and settings.

Phrase family search – Search for specific phrase families.

Phrase family search – Search for specific phrase families.

Phrase status – View the status key for phrase codes, especially when secured library or phrase workflow is enabled.

Phrase status – View the status key for phrase codes, especially when secured library or phrase workflow is enabled.

Language search – Select the target language for phrase families.

Language search – Select the target language for phrase families.

Phrase family information – View the list of phrases included in the selected phrase family.

Phrase family information – View the list of phrases included in the selected phrase family.

Phrase usage information – See which families the phrase or global ID is linked to.

Phrase usage information – See which families the phrase or global ID is linked to.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-translation-manager

Phrase Families

Creating and Managing Phrase Families

Phrase families group related phrases for use across multiple documents and languages. Selecting a phrase family enables you to view all phrases within the family, as well as other families that use those phrases. Follow the steps below to create and manage phrase families in Translation Manager.

Select an Existing Phrase Family

Use the GPSPhrases section to locate and view phrase families.

The selected phrase family appears on the Translation Manager Main form .

The selected phrase family appears on the Translation Manager Main form .

Create a New Phrase Family

Use the dialog to define a new phrase family and add translations.

In the Text Family – New Webpage Dialog, enter the desired Code and Text Family name.

To add translations: Select a language from the dropdown. Click Additional Languages . Enter the translation in the provided field.

To add translations:

Select a language from the dropdown.

Click Additional Languages .

Enter the translation in the provided field.

Click Save . The new phrase family now appears on the Translation Manager Main form .

Click Save . The new phrase family now appears on the Translation Manager Main form .

For more information, please visit: https://wercs.helpdocsonline.com/phrase-families

Phrases

Add, Edit, Copy, and Sync Phrases Across Languages

Use the Translation Manager to create, edit, copy, and synchronize phrases across languages. Phrases are stored in the Global Phrase Library and can be linked to multiple phrase families.

Add a New Phrase

Complete the following fields: Family – Automatically populates with the current phrase family. Text code – Automatically populates with the next available code. You may enter a different code, but the field cannot be blank. Scope – Select either: Custom – Default for phrases imported through GCS. These phrases sync during Global Resync. Limited – Prevents updates during Global Resync. Uncheck the sync checkbox to assign this setting. Severity – Assign a severity level for use with Autogenerate in Power Author Plus. Language – Select the appropriate language for the translation.

Complete the following fields:

Family – Automatically populates with the current phrase family.

Text code – Automatically populates with the next available code. You may enter a different code, but the field cannot be blank.

Scope – Select either: Custom – Default for phrases imported through GCS. These phrases sync during Global Resync. Limited – Prevents updates during Global Resync. Uncheck the sync checkbox to assign this setting.

Custom – Default for phrases imported through GCS. These phrases sync during Global Resync.

Limited – Prevents updates during Global Resync. Uncheck the sync checkbox to assign this setting.

Severity – Assign a severity level for use with Autogenerate in Power Author Plus.

Language – Select the appropriate language for the translation.

To save a new phrase, finish typing your complete phrase, then click Save .

To save a new phrase, finish typing your complete phrase, then click Save .

Edit an Existing Phrase

Sync control for each translation via the Sync checkbox.

Click the Translations Available message to Accept or Decline .

Add Comments

In the Edit Phrase Webpage Dialog, click Info to open the Phrase Info Webpage Dialog .

Click OK to apply or Cancel to exit.

Manage Translations

To eliminate duplicates, select a translation from the Matching Translations section.

Select the desired phrase and language(s), then click Move currently selected .

Select translations from the Selected Phrases Translation section.

Click Remove selected , then click Save to finalize.

Families Using Global Phrase

On the Translation Manager Main form, use the Families using global phrase section view all families using a particular phrase. From this section, users can also add the listed phrases to another phrase family, or delink the phrase from the selected phrase family.

To complete the process, follow the steps in Create and Manage Phrase Families .

To delink a phrase:

If the phrase you want to delink from the family cannot be unlinked because it is currently in use, the Phrases in use pop-up opens, displaying the related products, components, and rules where the phrase is currently in use.

View Global Phrases

Use the checkboxes on the Main form to view phrases in the Global Phrase Library.

Click Show unused phrases to filter for phrases not previously used.

From this form, you can also delete phrases, provided they are not assigned to a product/component, used in a rule, or reserved, To delete a phrase: Select the phrase. Click Delete.

Select the phrase.

Click Delete.

Copying Phrases

Use the Copy Phrases tool to duplicate phrases from one phrase family to another.

Select the source and destination families by clicking their associated selection icons. Use the Filtering tool to refine phrase selection.

Select the source and destination families by clicking their associated selection icons. Use the Filtering tool to refine phrase selection.

If the source family has gaps in phrase numbering, select Maintain Source Numbering to preserve those gaps in the destination family.

If the source family has gaps in phrase numbering, select Maintain Source Numbering to preserve those gaps in the destination family.

Select one or more phrases from the source family using the checkboxes.

Select one or more phrases from the source family using the checkboxes.

Click the Add icon to move selected phrases to the destination family.

Phrases appear in Red until saved.

To remove the phrase from the Destination family section, right-click on an individual Red phrase and click Remove phrase.

Once all options are set, click Save .

Once all options are set, click Save .

Sync Options

Use Sync Options to manage phrase synchronization between your database and the Global Content System (GCS).

Click Sync Options to open the Global Resync Dialog .

Match Base Language – Links phrases in your database to GCS phrases based on the base language defined in COMMON > BASE_LANGUAGE . Contact your Customer Service Representative to change this setting.

On this form, users run an initial phrase linking process to link phrases in your database by language to GCS phrases Choose sync parameters: By Format/Subformat By Family Or All Phrases

By Format/Subformat

By Family

Or All Phrases

Click Submit to process the Match Base Language report.

Impact Analysis Report

Use this report to preview database impacts before syncing with GCS.

Choose: Report Options – Include phrases associated to a Format/Subformat, a Family, or All Phrases. Link Status Options – View All phrases, Only Linked phrases, or Only Non-Linked phrases. Linked and Non-Linked refer to phrase linkage to GCS.) :

Report Options – Include phrases associated to a Format/Subformat, a Family, or All Phrases.

Link Status Options – View All phrases, Only Linked phrases, or Only Non-Linked phrases. Linked and Non-Linked refer to phrase linkage to GCS.) :

Click Submit to process the report.

View Previous Reports

Select View Previous Reports to access up to 25 recent reports. Double-click or right-click a report row to download it as an Excel file.

Global Resync

Use this option to update your GPSPhrase library by comparing the phrases in the library to the base language phrases in your database. Successful comparisons result in your database being populated with your accessible translations. You perform a Global resync on the Global ID and not text codes and/or data codes.

Apply the same parameters used for linking and analysis: Format/Subformat Family All Phrases

Format/Subformat

Family

All Phrases

For more information, please visit: https://wercs.helpdocsonline.com/phrases

Gps Phrases

Add, Edit, Copy, Sync, Export, and Import GPS Phrases

Use the GPSPhrases tools to manage phrase families and synchronize certified translations into the WERCS Studio Phrase Library. GPS supports 45 languages certified by Global Languages Translations and Consulting Inc. (GLTaC).

Launch GPSPhrases

Right-click the selected phrase to access options: View phrase – Opens a dialog showing the full phrase. Add selected as name of subsection – Enables you to select a GPSPhrase, designate a subsection code, and use the phrase as the family caption in your WERCS Studio database. After you enter the datacode/subsection as a new family, the phrase is added to your database, and the datacode can be added to the template. Add selected to WERCS phrases – Adds the selected phrase(s) to the current phrase family.

View phrase – Opens a dialog showing the full phrase.

Add selected as name of subsection – Enables you to select a GPSPhrase, designate a subsection code, and use the phrase as the family caption in your WERCS Studio database. After you enter the datacode/subsection as a new family, the phrase is added to your database, and the datacode can be added to the template.

Add selected to WERCS phrases – Adds the selected phrase(s) to the current phrase family.

View Phrase

Selecting View phrase opens the View Phrase Webpage Dialog .

Review the complete phrase, then click OK to close.

Add Selected as Name of Subsection

Selecting Add Selected as name of Subsection opens a similar dialog.

Enter the subsection code. and then click OK to apply.

Add Selected to WERCS Phrases

Complete the following fields: Insert On / After – Automatically defaults to the active phrase family. If the phrase family remains as the default, the new phrase(s) are placed in open gaps. To start phrase numbering at the last phrase/text code of the active family, enter the last text code Increment By – Set the increment using the arrow buttons. Severity – Assign a severity level (optional). Check for Existing Phrases – Verifies if selected phrases already exist in the database to prevent duplication.

Insert On / After – Automatically defaults to the active phrase family. If the phrase family remains as the default, the new phrase(s) are placed in open gaps. To start phrase numbering at the last phrase/text code of the active family, enter the last text code

Increment By – Set the increment using the arrow buttons.

Severity – Assign a severity level (optional).

Check for Existing Phrases – Verifies if selected phrases already exist in the database to prevent duplication.

UL WERCS Studio GPS Phrases

The WERCS GPS Phrases window opens. Click OK to begin the sync.

Languages

Use the Languages tool to configure language settings and manage phrase file locations. For GPS/GCS users, languages sync automatically when you download new phrase files. Otherwise, languages must be added manually .

Update Languages Manually

Enter the desired language information in the appropriate fields, then click Save : WERCS Language Code (“Code”) – Each language in WERCS Studio is assigned a 2-character code. Language Name (“Name”) –Language description. Character Set (“CharSet”) – Character Set (CharSet) or Code Page is an ordered set of characters that associates a numeric index (code point) with each character of a particular writing system. There are separate code pages for different writing systems. Some code pages provide support for groups of languages, while other code pages provide support for only a single language. List of Locale ID (“LCID”) – Values as Assigned by Microsoft. ChemADVISOR Language Codes (“Special”) – For the ChemADVISOR Loader to load component translation names into the WERCS Studio database, you must first set the linkage between the ChemADVISOR Language and your WERCS Studio Languages. In the languages form, the ChemADVISOR Language Identifier codes are stored in the “ Special” section. Date Format – Date format indicates how to display the date. For PowerAuthor users, this is how the date is displayed in both the “live build” and “published” documents. Translation Source – This field is the actual Microsoft Excel spreadsheet or XML files located in the Excel File Path setting, as specified in the application settings portion of this document (See the GCS reference for XML file information). The name entered into this field must match the file name EXACTLY. If this field is left blank, contains a typographical error, or is different from the actual Excel filename, the application returns an error for that particular language, resulting in the language failing to load when launching the form. RTF Codepage / RTF Encoding/ HTML Encoding – Controls how the characters are displayed throughout WERCS Studio. Stop character / Comma Character – Stop character and comma character for the language. Culture Key – Controls acceptable date formats, based on Windows culture settings. Is EU CLP – Select this check box if the language is recognized in EU CLP Regulation (EC) No 1272/2008 Active – Select this check box to mark the language is active in your Wercs Studio database.

WERCS Language Code (“Code”) – Each language in WERCS Studio is assigned a 2-character code.

Language Name (“Name”) –Language description.

Character Set (“CharSet”) – Character Set (CharSet) or Code Page is an ordered set of characters that associates a numeric index (code point) with each character of a particular writing system. There are separate code pages for different writing systems. Some code pages provide support for groups of languages, while other code pages provide support for only a single language.

List of Locale ID (“LCID”) – Values as Assigned by Microsoft.

ChemADVISOR Language Codes (“Special”) – For the ChemADVISOR Loader to load component translation names into the WERCS Studio database, you must first set the linkage between the ChemADVISOR Language and your WERCS Studio Languages. In the languages form, the ChemADVISOR Language Identifier codes are stored in the “ Special” section.

Date Format – Date format indicates how to display the date. For PowerAuthor users, this is how the date is displayed in both the “live build” and “published” documents.

Translation Source – This field is the actual Microsoft Excel spreadsheet or XML files located in the Excel File Path setting, as specified in the application settings portion of this document (See the GCS reference for XML file information). The name entered into this field must match the file name EXACTLY. If this field is left blank, contains a typographical error, or is different from the actual Excel filename, the application returns an error for that particular language, resulting in the language failing to load when launching the form.

RTF Codepage / RTF Encoding/ HTML Encoding – Controls how the characters are displayed throughout WERCS Studio.

Stop character / Comma Character – Stop character and comma character for the language.

Culture Key – Controls acceptable date formats, based on Windows culture settings.

Is EU CLP – Select this check box if the language is recognized in EU CLP Regulation (EC) No 1272/2008

Active – Select this check box to mark the language is active in your Wercs Studio database.

Recommended Steps After Adding a Language

Run WERCS GPS Sync.

Perform Export Phrase.

Run Global Resync.

Sync family on section headers; these are not included in Global sync. Note: See Add, Edit, and Sync Phrases Across Languages for detailed information about these processes .

Global Resync

Phrase Export/Import

Use this tool to export phrases or component names for translation, then re-import them into WERCS Studio.

On the Translation Manager Main form, select Phrase export/import from the Tools menu.

Select target language(s) in the Target Languages section.

Select target language(s) in the Target Languages section.

Next, select Export Filter options: Select a user or All Users Select a Date modified range. Choose Phrase Type :

Next, select Export Filter options:

Select a user or All Users

Select a Date modified range.

Choose Phrase Type :

Custom - Default setting for phrases imported through GCS. These phrases are sync'd and updates when Global Resync is run.

Limited - Setting is assigned by the user to prevent phrases from being updated by a Global Resync. Limited can be assigned to the phrase or the translation by unchecking the sync checkbox.

WERCS (Internal) - Provided by UL, these phrases update when a family and/or global resync is performed.

Choose Subsection export options:

All – Export phrases for all Subsections, including both those that have translations and blank phrases.

Blank only – Only export phrases that do not have a translation in the target language being exported.

Translations Only – Only export phrases that have translations in the target language being exported.

Specify Datacode(s) to export

Use Skip list to exclude previously translated families.

Select a Phrase Family and use the Filtering tool.

Click the Add button to add selected phrase families to skip, then close the dialog.

To begin the export, click Send to job queue on the Export Phrases form.

To begin the export, click Send to job queue on the Export Phrases form.

Import Phrases

Use this tool to import text phrases from spreadsheets.

Ensure the file name ends with –language code (e.g., Risk-DE.xlsx).

Select the import file and use the Filtering tool.

If more than one language file is imported, select additional Import Language(s), or select the first option to select all languages.

Click Send to job queue .

New English Phrases

If numeric characters are used in the textcode, the tool first searches for a decimal point and then finds the following two characters to determine the data code (f the text code 10.10 037 would result in the datacode 10.10).

If alpha characters are used in the textcode, the tool identifies the first alpha character moving from right to left. If you have a mix of alpha and numeric textcodes, create two spreadsheets for each language imported.

All three fields/cells must be “General” and cannot contain preceding spaces. If this procedure is not followed correctly, phrases fail to import.

Note : New English phrases functionality does not overwrite existing phrases in the Studio phrase library.

In the Import File field, select the file you are importing using the Filtering tool.

To prevent duplicates, check Eliminate duplicate global ID .

Click Send to job queue .

Component Names

Use this tool to export/import component names.

Click Export or Import , then follow steps in Add, Edit, and Sync Phrases Across Languages .

Export by Group

Use this option to export phrases assigned to product groups.

Follow the steps in Export Phrases in Add, Edit, and Sync Phrases Across Languages .

Product Names

Use this tool to export/import product names.

Click Export or Import , then follow the steps in Add, Edit, and Sync Phrases Across Languages .

Phrase Disputes

If you have concerns about your phrases, contact your Customer Service Representative for assistance with the Phrase Dispute process.

For more information, please visit: https://wercs.helpdocsonline.com/gps-phrases

Wizards

Wizards

The Wizards section introduces two guided interfaces designed to streamline complex tasks: the GHS Wizard and the Translation Wizard . These tools simplify regulatory and language-related processes by walking users through structured steps, enabling consistent and accurate data handling across your product records.

Each wizard is built to reduce manual effort and ensure compliance with internal standards and external regulations. Whether you're generating GHS classifications or managing multilingual content, these wizards provide clarity, control, and confidence.

Key Functional Areas

GHS Wizard - Enables you to generate GHS classifications using a step-by-step interface that evaluates product hazards, assigns appropriate pictograms, and populates required fields.

GHS Wizard - Enables you to generate GHS classifications using a step-by-step interface that evaluates product hazards, assigns appropriate pictograms, and populates required fields.

Translation Wizard - Enables you to translate product names, phrases, and other key fields into supported languages, ensuring multilingual consistency across SDS documents and product records.

Translation Wizard - Enables you to translate product names, phrases, and other key fields into supported languages, ensuring multilingual consistency across SDS documents and product records.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/wizards

Ghs Wizard

Welcome to the GHS Wizard

Use the GHS Wizard to execute Global Harmonization System (GHS) product classifications and generate hazard communication elements for SDS, Label, and other compliance documents. The wizard supports jurisdiction-specific adaptations through configurable settings, enabling accurate and efficient compliance. With GHS Wizard, you can:

Select the most efficient classification methods

View specific criteria for classifying hazardous materials

Determine hazard communication elements

Populate hazard communication documents easily and accurately

Key Functional Areas

Classification Method Selection - Choose from supported classification approaches based on product type and jurisdictional requirements.

Classification Method Selection - Choose from supported classification approaches based on product type and jurisdictional requirements.

Hazard Criteria Review - Access detailed criteria used to determine hazard classifications for physical, health, and environmental hazards.

Hazard Criteria Review - Access detailed criteria used to determine hazard classifications for physical, health, and environmental hazards.

Communication Element Generation - Automatically generate required hazard statements, signal words, pictograms, and precautionary statements.

Communication Element Generation - Automatically generate required hazard statements, signal words, pictograms, and precautionary statements.

Document Population - Populate SDS, Label, and other compliance documents using the selected classification and communication elements.

Document Population - Populate SDS, Label, and other compliance documents using the selected classification and communication elements.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

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For more information, please visit: https://wercs.helpdocsonline.com/ghs-wizard

Accessing Ghs Wizard

Accessing the GHS Wizard

This section provides an overview of the GHS Wizard, including how to access it from WERCS Studio and a summary of its main options.

Open the GHS Wizard

Use the steps below to access the GHS Wizard from the Authoring menu.

From the Authoring menu, select Wizards .

From the Authoring menu, select Wizards .

Navigate the GHS Wizard Main form

The GHS Wizard Main form includes four key areas for managing classifications and mappings.

Configuration – Navigate to Product Mapping and Component Mapping forms.

Configuration – Navigate to Product Mapping and Component Mapping forms.

Component Classification – Navigate to the Component Classification form.

Component Classification – Navigate to the Component Classification form.

Product Classification – Navigate to New Classification , Previous Classification , and Product Group Classifications forms.

Product Classification – Navigate to New Classification , Previous Classification , and Product Group Classifications forms.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-ghs-wizard

Configuration Mapping

Set Up Product and Component Mappings for Classification

Map Product Parameters

Use the Product Mapping form to associate product parameters with database subsections.

Double-click a desired Parameter to open the Select Subsection pop-up.

Double-click a desired Parameter to open the Select Subsection pop-up.

Map Component Parameters

Use the Component Mapping form to associate component parameters with database subsections.

Double-click a desired Parameter to open the Select Subsection pop-up.

Double-click a desired Parameter to open the Select Subsection pop-up.

For more information, please visit: https://wercs.helpdocsonline.com/configuration-mapping

Component Classification

Classify Components Using GHS Criteria

The GHS Wizard uses CTXT and CVAL inputs to classify products based on component data. Every component in the Studio database can be classified using QN inputs that follow GHS building blocks. For more information on inputs, see Section 4.2 Inputs used for Calculations .

Navigate the GHS Wizard interface

Select Main Menu from any form in the GHS Wizard to return to the Main form . See GHS Wizard Main Form in Accessing the GHS Wizard .

Select Main Menu from any form in the GHS Wizard to return to the Main form . See GHS Wizard Main Form in Accessing the GHS Wizard .

Select Data Management to open the Regulation Matrix or Manage Component forms. See Using Data Management Tools below for more details.

Select a Component for Classification

You can search for components either within a specific product or across the entire database.

To limit the search to components in a specific product, select the Search only components within a select product checkbox.

To limit the search to components in a specific product, select the Search only components within a select product checkbox.

Click the Search icon next to the Product field to open the Select Product form. Double-click a product to add it to the search field.

Click the Search icon next to the Product field to open the Select Product form. Double-click a product to add it to the search field.

Note: When a product is selected, a Product Classification option appears in the menu bar. See Run and Manage Product-Level GHS Classifications .

Note: When a product is selected, a Product Classification option appears in the menu bar. See Run and Manage Product-Level GHS Classifications .

Review and Edit Component Classification Data

Once you select a component, the Component Classification grid appears at the bottom of the form. This grid displays all inputs used by the GHS Wizard to classify products.

Click the Info icon to view legend information about grid colors.

Click the Info icon to view legend information about grid colors.

Hover over any field to view the linked data code.

Hover over any field to view the linked data code.

Double-click a field to open the Edit Content window. QNxx fields allow assignment of QN codes. Value-based data codes accept numbers. Text-based data codes accept text.

Double-click a field to open the Edit Content window.

QNxx fields allow assignment of QN codes.

Value-based data codes accept numbers.

Text-based data codes accept text.

Enter Component Toxicity Data

Use CVAL subsections to enter toxicity data for GHS Wizard calculations.

Enter Acute Toxicity Estimate (ATE) values for acute health toxicities, if available. See the table in Reference QN Component Classification Inputs from the UN GHS model regulations for conversion formulas.

Enter Acute Toxicity Estimate (ATE) values for acute health toxicities, if available. See the table in Reference QN Component Classification Inputs from the UN GHS model regulations for conversion formulas.

Use the EXLD50 reserved subsection to exclude non-hazardous chemicals from unknown toxicity and ecotoxicity calculations.

Use the EXLD50 reserved subsection to exclude non-hazardous chemicals from unknown toxicity and ecotoxicity calculations.

Adjust View Options

Use the display controls at the top right of the form to customize the grid view.

Formats – Select a display format from the dropdown menu.

Formats – Select a display format from the dropdown menu.

Display Data – Filter the grid to show only LD/LC data or Category (QN) data.

Display Data – Filter the grid to show only LD/LC data or Category (QN) data.

Using Data Management Tools

Additional tools for managing component data are available in the Data Management menu.

Regulation Matrix – Opens the Regulation Matrix form to analyze products and components against assigned regulations. See the Regulatory Tracking reference for details.

Regulation Matrix – Opens the Regulation Matrix form to analyze products and components against assigned regulations. See the Regulatory Tracking reference for details.

Manage Components – Opens the Manage Components form to manage all data associated with a component. See the Manage Components section of the Power Author Plus reference.

Reference QN Component Classification Inputs

For more information, please visit: https://wercs.helpdocsonline.com/component-classification

Product Classifications

Run and Manage Product-Level GHS Classifications

Use the GHS Wizard to classify individual products or product groups based on hazard criteria. Follow the steps below to access classification forms, create projects, and manage classification data.

Access Product Classification Forms

You can open the individual product classification form from multiple locations.

From the Component Classification form, select the Product Classification menu option.

From the Component Classification form, select the Product Classification menu option.

Click New Classification to start a new project.

Click New Classification to start a new project.

Double-click a row in the Recent Classifications grid, if available.

Double-click a row in the Recent Classifications grid, if available.

Create a New Classification Project

Start a new classification project to group products with the required format and model.

Click New Classification .

Click New Classification .

Select whether the product is a Substance or Mixture : Substance – A chemical element or compound in its natural state or produced, excluding solvents that can be separated without affecting stability. Mixture – A solution composed of two or more substances that do not react.

Select whether the product is a Substance or Mixture :

Substance – A chemical element or compound in its natural state or produced, excluding solvents that can be separated without affecting stability.

Mixture – A solution composed of two or more substances that do not react.

Use the Search buttons to select a Format , SubFormat , and Product .

Use the Search buttons to select a Format , SubFormat , and Product .

Select a Model (formulation) to use for classification.

Select a Model (formulation) to use for classification.

Configure Application Settings

Use the following GHS ENGINE settings to control default behavior:

FORMAT – Automatically selects a format when creating a new project.

SUBFORMAT – Automatically selects a subformat when creating a new project.

USEONEFORMAT – Set to 1 for single format: projects with the same format, subformat, and product share hazard classifications. Set to 0 for multi-format: projects with the same format and product share hazard classifications.

Set to 1 for single format: projects with the same format, subformat, and product share hazard classifications.

Set to 0 for multi-format: projects with the same format and product share hazard classifications.

Note: Classification results may vary by format/subformat due to regional regulations, thresholds, or adopted GHS building blocks.

Note: Classification results may vary by format/subformat due to regional regulations, thresholds, or adopted GHS building blocks.

Use the Product Classification Form

From the individual Product Classification form, you can manage hazard data and classification results.

Click the Product Notes or Related Documents icons to review supporting information.

Click the Product Notes or Related Documents icons to review supporting information.

The form opens on the Physical Hazards tab. Click the HealthEnv tab to view health and environmental hazards.

The form opens on the Physical Hazards tab. Click the HealthEnv tab to view health and environmental hazards.

Click Reset All to clear existing classifications.

Click Reset All to clear existing classifications.

Hover over the Info icon to learn more about physical hazards.

Hover over the Info icon to learn more about physical hazards.

Classify Physical Hazards

Use the grid to assign hazard classifications manually.

Click a hazard class row to open the Edit Content pop-up.

Click a hazard class row to open the Edit Content pop-up.

Select the desired QM classification. The Category and QM appear in the corresponding row.

Select the desired QM classification. The Category and QM appear in the corresponding row.

Note: Physical hazard classification requires manual QM entry, except for Flammable Liquids . GHS Wizard considers only the first five physical hazards based on QM numerical order.

Note: Physical hazard classification requires manual QM entry, except for Flammable Liquids . GHS Wizard considers only the first five physical hazards based on QM numerical order.

Classify Health and Environmental Hazards

Use the HealthEnv tab to assign health and environmental hazard classifications.

Click a hazard class row to open the Edit Content pop-up.

Click a hazard class row to open the Edit Content pop-up.

Select the desired QM classification. The Category and QM appear in the corresponding row.

Select the desired QM classification. The Category and QM appear in the corresponding row.

Use the following options: Click Apply Rules to open the rule dialog. See the Rule Writer reference for details. Click Calculate All to run the GHS Wizard for all hazard types. Select Use product-level toxicity data to override component data for: Acute Toxicity (all routes) STOT-RE STOT-SE Aspiration hazard Physical hazards Non-GHS hazards

Use the following options:

Click Apply Rules to open the rule dialog. See the Rule Writer reference for details.

Click Calculate All to run the GHS Wizard for all hazard types.

Select Use product-level toxicity data to override component data for: Acute Toxicity (all routes) STOT-RE STOT-SE Aspiration hazard Physical hazards Non-GHS hazards

Acute Toxicity (all routes)

STOT-RE

STOT-SE

Aspiration hazard

Physical hazards

Non-GHS hazards

Review Classification Results

After processing, the form displays updated classification data.

View the Calculation Report section above the Health/Environmental grid. Click Calculation Report to see how the classification was derived.

View the Calculation Report section above the Health/Environmental grid. Click Calculation Report to see how the classification was derived.

The Category column shows the assigned classification.

The Status column updates to Done for each completed hazard class.

View Pictograms , Signal Word , and H-statements in the Precedence section.

Run Product Group Classification

Use the Product Group Classification form to classify multiple products at once.

From the Main form , click Product Group Classification .

From the Main form , click Product Group Classification .

Select a Product Group to classify.

Select a Product Group to classify.

(Optional) Select Use product-level toxicity data .

(Optional) Select Use product-level toxicity data .

Select a Format and SubFormat .VUse the All checkbox to select all formats or subformats.

Select a Format and SubFormat .VUse the All checkbox to select all formats or subformats.

Click Calculate All to run the wizard.

Click Calculate All to run the wizard.

After processing, select a project to view its Calculation Report .

After processing, select a project to view its Calculation Report .

Reference QN Product Classification Inputs

For more information, please visit: https://wercs.helpdocsonline.com/product-classifications

Transportation Wizard

Welcome to the Transportation Wizard

Use the Transportation Wizard to classify mixtures in accordance with transportation legislation. The wizard enables accurate hazard classification and identification of shipping details required for compliance with global transport regulations. With Transportation Wizard, you can:

Select a product to classify.

Review hazard classifications.

Determine proper shipping name.

Key functional areas

Product Selection - Choose the product or mixture to be evaluated for transportation compliance.

Product Selection - Choose the product or mixture to be evaluated for transportation compliance.

Hazard Classification Review - View applicable hazard classes based on product composition and regulatory thresholds.

Hazard Classification Review - View applicable hazard classes based on product composition and regulatory thresholds.

Shipping Name Determination - Identify the correct Proper Shipping Name for use in transport documentation and labeling.

Shipping Name Determination - Identify the correct Proper Shipping Name for use in transport documentation and labeling.

Supported transportation legislation

The Transportation Wizard enables compliance with various regional and international transportation regulations. Based on chemical formulations and product knowledge, you can determine the Proper Shipping Name (PSN) and other key requirements for transportation documentation, including SDSs and labels.

The wizard supports a wide range of regional and international regulations:

Regional transportation

Australia – Australian Code for the Transport of Dangerous Goods by Road & Rail (ADG)

Brazil – Supplementary Instructions to the Regulation of the Terrestrial Transportation of Dangerous Products (ANTT)

Canada – Transportation of Dangerous Goods (TDG)

China – Road Transportation of Dangerous Goods

Europe – European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR) European Agreement concerning the International Carriage of Dangerous Goods by Inland Waterways (ADN)

European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR)

European Agreement concerning the International Carriage of Dangerous Goods by Inland Waterways (ADN)

Japan – Japan Ship Safety Act

Mexico – Official Mexican Standard: List of the Most Commonly Transported Dangerous Substances and Materials

U.S. – US Department of Transportation (DOT)

International transportation

UN Recommendations on the Transport of Dangerous Goods – Model Regulations

International Air Transport Association (IATA) – Dangerous Goods Regulation

International Civil Aviation Organization (ICAO) – Technical Instructions for the Safe Transport of Dangerous Goods by Air

International Maritime Organization (IMO)

International Maritime Dangerous Goods (IMDG)

International Carriage of Dangerous Goods by Rail (RID)

The wizard automatically fills in required transportation information for SDSs and labels.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

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For more information, please visit: https://wercs.helpdocsonline.com/transportation-wizard

Accessing Transportation Wizard

Accessing the Transportation Wizard

Note: Use of the Transportation Wizard requires: Transportation Wizard license from UL ChemAdvisor license Transportation Advisor data license

Note: Use of the Transportation Wizard requires:

Transportation Wizard license from UL

ChemAdvisor license

Transportation Advisor data license

Transportation Wizard Main form

Use the following sections to manage product selection, classification, and output.

Navigational menu – Navigate to the Main form or Application Settings .

Navigational menu – Navigate to the Main form or Application Settings .

Main Configuration Area – Select a product and model, define technical name, and manage qualifiers.

Main Configuration Area – Select a product and model, define technical name, and manage qualifiers.

Classification Known – Select a Proper Shipping Name (PSN). See Select and Apply Known Transport Classifications for details.

Classification Known – Select a Proper Shipping Name (PSN). See Select and Apply Known Transport Classifications for details.

Main Area – Displays the current page for the selected tab.

Main Area – Displays the current page for the selected tab.

Information determined so far – View applied transportation classification details. This information appears in Section 14 of the SDS.

Information determined so far – View applied transportation classification details. This information appears in Section 14 of the SDS.

Show detailed output – Enable additional detail in the Information determined so far section.

Show detailed output – Enable additional detail in the Information determined so far section.

Action Buttons – Perform additional actions. See the following section for more information.

Action Buttons – Perform additional actions. See the following section for more information.

Action buttons

These action buttons provide access to dialogs and tools for managing classification data.

Initialize Product – Resets mapped subsections to default values. Useful when re-running the wizard on a product with existing transportation data.

Initialize Product – Resets mapped subsections to default values. Useful when re-running the wizard on a product with existing transportation data.

Components – Opens the Component Classification Webpage Dialog .

Components – Opens the Component Classification Webpage Dialog .

This dialog is useful for reviewing the UN Number, Packing Group, and Hazard that each component in the product is triggering in the Transportation Wizard calculations.

Click the radio buttons along the top to review the information for each regulation.

Clicking the associated dropdown menus for each regulation, and by

Clicking the associated dropdown menus for each regulation, and by

Selecting either the Master Formulation Name, or a synonym associated with that product.

Selecting either the Master Formulation Name, or a synonym associated with that product.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-transportation-wizard

Transport Wiz Configure

Configuring product and model settings

Selecting a product

To choose the product to classify using the product selection tool:

Click the Product to classify button.

Click the Product to classify button.

Selecting a model

To choose the model to classify, select a model from the Model to classify dropdown.

Copying results from another product

To use an existing product’s classification as a template:

Click the Product profile to copy result from button.

Click the Product profile to copy result from button.

Use the Filtering tool to select a product.

Use the Filtering tool to select a product.

Selecting rule groups or streams

To apply a rule set to guide classification:

Click the Rule Group/Stream button.

Click the Rule Group/Stream button.

Click Toggle to switch between Groups and Streams .

Click Toggle to switch between Groups and Streams .

Assigning a technical name

To manually assign a technical name for a product:

Click Select Technical Name to open the Dialog.

Click Select Technical Name to open the Dialog.

Choose up to two components using checkboxes.

Choose up to two components using checkboxes.

(Optional) Select up to two components by clicking the associated checkboxes: Product is a hazardous waste — designates the product as hazardous waste. Assign no Technical Name — excludes component Technical Name options. Selecting this option deselects components, and removes Technical Names from the bottom of the form.

(Optional) Select up to two components by clicking the associated checkboxes:

Product is a hazardous waste — designates the product as hazardous waste.

Assign no Technical Name — excludes component Technical Name options. Selecting this option deselects components, and removes Technical Names from the bottom of the form.

Click Save to apply the new Technical Name:

Click Save to apply the new Technical Name:

The new Technical Name appears at the bottom of the dialog.

To delete a Technical Name assignment, click Remove .

Assigning a marine pollutant name

To manually assign or exclude marine pollutant names:

Click Marine Pollutant to open the Marine Pollutant Webpage Dialog .

Click Marine Pollutant to open the Marine Pollutant Webpage Dialog .

Select up to two components by clicking the appropriate checkboxes. Not a marine pollutant (MP) — designates that the product is not a marine pollutant. Assign no Marine Pollutant Name — excludes component Marine Pollutant Name options. Selecting this option deselects components and removes marine pollutant names from the bottom of the form.

Select up to two components by clicking the appropriate checkboxes.

Not a marine pollutant (MP) — designates that the product is not a marine pollutant.

Assign no Marine Pollutant Name — excludes component Marine Pollutant Name options. Selecting this option deselects components and removes marine pollutant names from the bottom of the form.

Click Save to apply the new marine pollutant name to the currently selected regulation:

Click Save to apply the new marine pollutant name to the currently selected regulation:

The marine pollutant name appears at the bottom of the dialog.

To delete a marine pollutant assignment, click Remove .

Assigning a reportable quantity name

To manually assign or exclude Reportable Quantity (RQ) names for DOT regulation:

Click Select Reportable Quantity Name to open the Reportable Quantity Name Dialog .

Click Select Reportable Quantity Name to open the Reportable Quantity Name Dialog .

Select up to two components by clicking the appropriate checkboxes. Not a Hazardous substance (RQ) — designates that the product is not a hazardous substance and not applicable to DOT RQ. Assign no Reportable Quantity Name — excludes component Marine Pollutant Name options. Selecting this option deselects components and removes names from the bottom of the form.

Select up to two components by clicking the appropriate checkboxes.

Not a Hazardous substance (RQ) — designates that the product is not a hazardous substance and not applicable to DOT RQ.

Assign no Reportable Quantity Name — excludes component Marine Pollutant Name options. Selecting this option deselects components and removes names from the bottom of the form.

Click Save to apply the Reportable Quantity Name to the currently selected regulation:

Click Save to apply the Reportable Quantity Name to the currently selected regulation:

The Reportable Quantity Name appears at the bottom of the dialog.

To delete a Reportable Quantity Name assignment, click Remove .

For more information, please visit: https://wercs.helpdocsonline.com/transport-wiz-configure

Classification Known

Selecting and applying known transport classifications

Classification known mode overview

The interface is divided into several tabs that guide the classification process:

Main Area – Displays relevant content for the selected tab.

Select Classification Tab – Specify UN Number, Packing Group, subsidiary hazard class, and keywords.

Basic Information Tab – Define packaging and transport details.

Options for PSN Calculation Tab – Apply additional filters.

Filtering PSNs using classification criteria

Use the Select Classification tab to narrow down the list of Proper Shipping Names.

Packing Group – Use this dropdown to select the product’s packing group, if known.

Additonal Sub-Haz. Class – Use this field to add a subsidiary hazard class

Keywords – Use this field to filter by a keyword used in the Proper Shipping Name (for example, “n.o.s.” Use the “%” percent symbol to search for a partial word (for example, “Combust%”)

Entering packaging and transport details

This page is broken out into three main areas:

Packaging Information

Transport Information

Mixtures/Solution Qualifiers

Entering packaging information

Enter Packaging Volume/Mass , Gross Weight , and Individual Inner Container Weight .

Enter Packaging Volume/Mass , Gross Weight , and Individual Inner Container Weight .

Packaging Volume/Mass – Refers to the container that holds a hazardous material. It can be small, like a box or sealed canister; or it may be large, like a freight car. Enter the Volume/Mass in the area provided.

Gross Weight (Packaging + Contents) – Enter the total weight (or volume – depending on the physical state) of the packaging, including its contents.

Individual Inner Container Weight – If composite packaging is used, use the Individual Inner Container Weight area to specify the weight (or volume).

Units – The Units are automatically selected based on the product’s physical state.

Review and adjust the following checkboxes as needed:

EMPTY package - residue only

Unitized in cages, carts, boxes or similar overpacks

Corrugated fiberboard tray packing

Quantity ≤ 250 kg per pallet

Entering transport information

Transport as ID8000

Transported by exclusive-use carrier

Transported to/from manufacturer or disposal facility

Transported for processing or disposal

Transport as Limited Quantity (LQ)

Transport as Limited Quantity (LQ-Y) for Air

Suppressing or adding mixture/solution qualifiers

Use these radio buttons to suppress or add qualifiers. By default, the Neither option is selected.

To Suppress Mixture/Solution Qualifiers — Select the radio button for that option and no further action is required.

To Add Mixture Qualifiers – Select the Add Mixture/Solution radio button, and then Select the Mixture radio button.

To Add Solution Qualifiers – Select the Add Mixture/Solution radio button, and then Select the Solution radio button.

To Add Solution Qualifiers – Select the Add Mixture/Solution radio button, and then Select the Solution radio button.

To Add both Mixture and Solution Qualifiers – Select the Add Mixture/Solution radio button, and then Select the Any radio button.

To Add both Mixture and Solution Qualifiers – Select the Add Mixture/Solution radio button, and then Select the Any radio button.

Applying PSN calculation filters

Use the Options for PSN Calculation tab to refine the list of suggested PSNs.

Filter by physical state – Limits PSNs to solid, liquid, or gas.

Filter by physical state – Limits PSNs to solid, liquid, or gas.

Filter for pesticides – Limits PSNs to those containing “Pesticide”.

Filter for pesticides – Limits PSNs to those containing “Pesticide”.

Fill missing translations – Attempts to complete missing PSN and shipping description translations.

Fill missing translations – Attempts to complete missing PSN and shipping description translations.

Selecting and assigning proper shipping names

Use the PSN/Finish tab to finalize and apply PSNs to each regulation.

PSN selection

The PSN Selection area displays a list of Proper Shipping Names based on the product, component, and classification information provided. This list may vary for each regulation.

View the list of PSNs generated based on product and classification data.

View the list of PSNs generated based on product and classification data.

Click the tabs at the top to switch between regulations (for example, DOT, IATA).

Click the tabs at the top to switch between regulations (for example, DOT, IATA).

Alternatively, apply the PSN/Finish to all regulations at once.

Click anywhere in the row (excluding the PSN/Finish column).

Managing selected classifications

Use the Selected Classifications grid to preview and adjust PSNs before applying them.

Click an individual cell to highlight it, then click the Remove button to remove the data from it.

Click an individual cell to highlight it, then click the Remove button to remove the data from it.

Alternatively, click a regulation to highlight an entire row, or click a transport method to highlight an individual column.

Alternatively, click a regulation to highlight an entire row, or click a transport method to highlight an individual column.

Click the Select All button to select all cells, or the Deselect All button to deselect all fields.

Click the Select All button to select all cells, or the Deselect All button to deselect all fields.

Applying and overriding classifications

After adding PSNs to the Selected Classifications area:

Similar to the Selected Classifications section, click individual cells, regulations, or transport methods to select and highlight cells.

Use the Remove button to remove the selected PSNs from the product. This method is often an easier way to remove a few erroneous PSNs, rather than using the Initialize button and starting over.

To override existing classifications:

Add new PSNs to the Selected Classifications grid.

Select the Overwrite currently applied regulations checkbox.

For more information, please visit: https://wercs.helpdocsonline.com/classification-known

Distribution

Distribution

The Distribution menu provides tools for managing the creation, formatting, and delivery of product labels and documents across various output channels. It supports both manual and automated workflows, enabling users to design, publish, print, and distribute regulatory and customer-facing materials.

This module is organized into functional areas that guide users through label design, publishing, printing, and document writing. It also includes utilities for CD-based document distribution and customer service support.

Key Functional Areas

This module includes the following functional areas:

CD Writer – Supports the export of SDS documents and other materials to CD format for physical distribution.

Customer Service – Offers access to customer-specific tools and support functions.

Label Designer – Provides tools for creating and customizing label layouts and formats.

Label Print Station – Enables users to print labels manually or in bulk from predefined templates.

Label Publisher – Manages the publishing of finalized label designs for use in production environments.

Report Writer – Generates reports based on distribution and labeling data.

The Distribution Module is designed to streamline the creation and delivery of product documentation, ensuring consistency, compliance, and accessibility across distribution channels.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/distribution

Cd Writer

CD Writer Overview

The CD Writer module enables you to export published SDS documents to CDs and other backup media, supporting customer delivery and archival needs. It provides flexible export options based on ingredient, publication date, or group name, and integrates with the HAZCOM viewer for rapid SDS retrieval using custom search criteria.

Export SDSs to CDs or other types of backup media.

Provide groups of SDSs to customers based on ingredient, published date, or group name.

Utilize the HAZCOM viewer to quickly retrieve SDSs based on custom search criteria.

Key functional areas

Export SDSs – Generate export sets for CDs or backup media using configurable filters

Group SDSs for Customers – Package SDSs by ingredient, date, or group name for targeted delivery

HAZCOM Viewer Integration – Enable fast SDS lookup using tailored search parameters

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

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For more information, please visit: https://wercs.helpdocsonline.com/cd-writer

Accessing Cd Writer

Accessing CD Writer

Use CD Writer to manage distribution-related data and configurations within WERCS Studio.

Module access

CD Writer Main form

Selecting CD Writer opens the CD Writer Main form, enabling you to view and manage distribution records and settings.

The main CD Writer form is broken into four areas:

Action buttons – Submit a job to the Job Queue or view the statuses of jobs that have already been submitted.

Document Options – Select the document type, Format, Plant, Subformat, and language for your document(s).

Filter navigational tabs – Navigate to different filters to customize your submission.

Filtering options – Select your destination folder via the options provided by the selected filter.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-cd-writer

Configuration Setup

Configuring CD Writer settings and paths

Before running CD Writer for the first time, you must configure several Application Settings that control the module's output behavior.

Accessing configuration settings

Access CD Writer settings from the Application Settings module.

Open the Application Settings module.

From the Filter by parent dropdown menu, select CD Writer . The CD Writer-specific settings appear.

From the Filter by parent dropdown menu, select CD Writer . The CD Writer-specific settings appear.

Configuring CD Writer application settings

Configure the following settings to ensure proper output and integration:

Defining the destination path

Enter the directory path where exported SDSs are written.

Enter the directory path where exported SDSs are written.

Managing Documentum columns

This setting controls the column headings in the Excel spreadsheet generated when the Produce Spreadsheet checkbox is selected from the Index File tab.

This setting controls the column headings in the Excel spreadsheet generated when the Produce Spreadsheet checkbox is selected from the Index File tab.

Defining file mask

Define the output file naming convention.

Define the output file naming convention.

Example: @Product-@Format-@Subformat creates filenames using the Product ID, Format, and Subformat.

You can also use custom search fields if configured in your WERCS Studio environment.

Contact your Customer Service Representative for help with custom field setup.

For more information, please visit: https://wercs.helpdocsonline.com/configuration-setup

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Exporting SDS documents using the CD Writer

Use the CD Writer form to configure export formats, apply filters, define document and file criteria, and submit or schedule SDS document export jobs.

Selecting export options

Select the desired file format(s) by selecting the appropriate checkboxes (for example, RTF, HTML, PDF, Excel, XML).

Select the desired file format(s) by selecting the appropriate checkboxes (for example, RTF, HTML, PDF, Excel, XML).

To limit documents by format:

Select a Format from the dropdown menu.

A list of Subformats appears.

To limit documents by language:

Select the checkboxes for the desired languages.

Submitting the export job

After selecting all desired options, click Submit .

After selecting all desired options, click Submit .

Viewing job status

Click Check Jobs to view the status of previously submitted jobs.

Click Check Jobs to view the status of previously submitted jobs.

The CD Writer Jobs webpage dialog opens, displaying:

The submitted job

Its status

The submitting user

For more information, please visit: https://wercs.helpdocsonline.com/a9igcxi6du2helusg0ps

Filtering Export Options

Filtering, export and scheduling options

CD Writer provides additional filtering options to store generated files in your desired destination folders. These options are organized across several tabs, each enabling specific criteria for document generation and export.

Configuring file locations

Vendor documents source – This hardcoded setting is set to the publishing folder for DocuWERCS, enabling you to export Vendor documents.

Destination Drive and Folder – By default, this setting writes documents to the server location. You can enter a new path to your computer by creating a folder using the format: \YOURCOMPUTERNAMEINITIALFOLDER and giving all users full permission to the folder. This enables the job processor to write files to this folder.

To configure layout and destination settings:

Filtering specific document criteria

Select any of the following options: Create additional XML file – Sends an XML file to the destination folder along with the selected document(s). (Only created if the file type is PDF). Generate for a specific revision date range only – Generates documents within the specified revision date range. Generate for a specific publish date range only – Generates documents within the specified publish date range. Web availability – Select the interface for viewing documents (Authorization Value). To include unauthorized documents, select Not Authorized from the dropdown menu.

Select any of the following options:

Create additional XML file – Sends an XML file to the destination folder along with the selected document(s). (Only created if the file type is PDF).

Generate for a specific revision date range only – Generates documents within the specified revision date range.

Generate for a specific publish date range only – Generates documents within the specified publish date range.

Web availability – Select the interface for viewing documents (Authorization Value). To include unauthorized documents, select Not Authorized from the dropdown menu.

To replace special characters in the Product ID:

Click the Reserved characters button.

If your selected Subformat contains predefined custom fields:

Click the Get custom field captions button to search documents that have been published with data in those fields.

The default Subsection datacode names from the custom fields defined within the selected Subformat appear. Review the default subsection datacode names.

Note: This option is unavailable if multiple Subformats are selected. Clicking the button in that case opens an error message.

Note: This option is unavailable if multiple Subformats are selected. Clicking the button in that case opens an error message.

Select the Overwrite destination file if it exists checkbox to overwrite existing files in the destination folder.

Select the Overwrite destination file if it exists checkbox to overwrite existing files in the destination folder.

Review the File Name Format field to confirm the name format for generated documents. If a field is missing, the next available field is used.

Review the File Name Format field to confirm the name format for generated documents. If a field is missing, the next available field is used.

Contact your Customer Service Representative before adjusting file name format functionality.

Contact your Customer Service Representative before adjusting file name format functionality.

Filtering product-specific criteria

To configure product filtering:

Select any of the following options: Product name contains – Filters documents based on keywords in the product name. Alias ID contains – Filters documents based on Alias ID content.

Select any of the following options:

Product name contains – Filters documents based on keywords in the product name.

Alias ID contains – Filters documents based on Alias ID content.

To filter by product groups: Select the checkbox for your desired product group(s). Right-click and choose to move the selected group(s) or all groups on the page.

To filter by product groups:

Select the checkbox for your desired product group(s).

Right-click and choose to move the selected group(s) or all groups on the page.

To remove selected product groups: Double-click the group in the Selected Product Groups section.

To remove selected product groups:

Double-click the group in the Selected Product Groups section.

Generating the index file

To generate the index file:

Click the Index File tab.

Select the Produce Spreadsheet checkbox. The spreadsheet format is pre-defined and cannot be modified.

Filtering by selected components

To configure component filtering:

Click the Component Criteria tab.

Select the desired components.

Click the Add button to move them to the right-hand column.

To remove a component, select it and click the Remove button.

Sending current submission to designated FTP location

To configure FTP settings:

Click the FTP tab.

Select the Upload MSDS files via FTP checkbox.

Configuring the Scheduler

To configure scheduling:

Click the Scheduler tab.

Select the frequency and date/time for your job.

Select the Publish documents will be generated for specified number of days prior to today checkbox to limit generation to a custom number of days before today’s date.

For more information, please visit: https://wercs.helpdocsonline.com/filtering-export-options

Customer Service

Welcome to Customer Service

Use the Customer Service interface to manage service-related records, enabling you to log customer inquiries, assign responsibility, and monitor resolution progress across departments.

With Customer Service, you can:

Create and manage customer service records.

Designate users or teams to handle specific service cases.

Monitor progress and closure of service issues.

View historical service records linked to customers or products.

Record interactions and follow-ups with customers.

Define and manage types of service issues for reporting and analysis.

Key Functional Areas

Service Entry – Create new service cases and update existing records with issue details and customer information.

Assign Responsibility – Assign service cases to specific users or teams for follow-up and resolution.

Track Resolution Status – Monitor status for open, in-progress, and closed service cases.

Service History – Access historical service records for auditing and customer relationship management.

Customer Communication Log – Document all customer interactions related to service cases.

Service Categories – Configure issue types to support reporting, filtering, and trend analysis.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/customer-service

Accessing Customer Service

Accessing Customer Service

Use the Customer Service module to manage customer-related data, including hazardous products, MSDS records, suppliers, and emergency contacts.

Module Access

From the Distribution menu, select Customer Service .

This opens the Customer Service Navigation menu.

Main Form

Customer List – View and manage customer records.

MSDS List – Access Material Safety Data Sheets.

History – View historical activity and changes.

Product Groups – Organize products into logical groups.

Product Aliases – View and assign alternate product names.

Aliases with Attributes – View aliases with associated attributes.

Hazardous Products – Review products flagged as hazardous.

Cover Letter – Generate and manage cover letters.

Suppliers – Manage supplier information.

Sites – Manage site-specific data.

Emergency Contacts – Maintain emergency contact details.

Addresses – Manage customer and site addresses.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-customer-service

Msds List

Viewing and Distributing SDS Documents

Use the MSDS List and History tabs to manage, view, print, and distribute SDS documents stored in your database.

Accessing the MSDS List

To view the published SDSs for a particular format, select a format from the navigational tabs at the top of the form

Right-click on the document row to View , Email , Print , or Fax the document. View Email – Opens a dialog to enter contact details and a message. Fax – Opens a dialog to enter contact details and a message. Requires Microsoft Fax Service be installed locally. Print

View

Email – Opens a dialog to enter contact details and a message.

Fax – Opens a dialog to enter contact details and a message. Requires Microsoft Fax Service be installed locally.

Print

Use the checkboxes at the top right of the form to control the grid display:

Hide unauthorized documents – Enables you to view only authorized SDSs.

Custom Fields – Enables display of custom field columns.

Viewing Request and Order History

The History function permanently stores your company's request history, letter history, and order history.

Use the dropdown menu at the top left to navigate between:

Request History – Displays customer SDS requests.

Letter History – Displays published letters.

Order History – Displays individual customer orders and tracking details.

To filter history by date:

Click the Search button.

Select a date range in the Select Date Range Webpage Dialog .

Click Show to view results.

If you select Request History , right-click a row and select View Destination to see the email destination for the request.

If you select Order History , right-click a row and select View MSDS to open the Published Documents Webpage Dialog , displaying available formats.

For more information, please visit: https://wercs.helpdocsonline.com/msds-list

Customer List

Managing Customer Records and Details

Use the Customer List to manage customer records, including addresses, orders, mailings, and notes.

Accessing the Document Distribution Form

To manage customer records using the Document Distribution form, click Customer List .

Create a New Customer

To add a new customer:

Click the Add New button at the top of the form. The Customer – New Webpage Dialog opens.

Enter a Customer ID and Name in the appropriate fields. The Entry Date is autopopulated.

Select a Customer Type from the dropdown.

This two-character code determines the appropriate cover letter for SDS distribution. Refer to Power Author Plus for details on Cover Letter Management.

To use a type not listed, enter it in the Other Type field.

Add and View Customer Notes

To manage notes, right-click a customer and select Notes . A note icon appears in the Notes column if a note exists.

In the Notes pop-up:

Enter a note in the New Note field.

Click Save .

To export all notes, click the Export icon.

Add New Customer Addresses

To add an address:

Enter contact information and distribution preferences.

Click Save .

Note: A customer can have multiple addresses. Each address defines the default format and language for SDS distribution.

Note: A customer can have multiple addresses. Each address defines the default format and language for SDS distribution.

Add New Customer Orders

To create a new order:

Click the calendar icon to select a Request Date .

Select Plant , Language , Format , and Subformat using the Search buttons and filtering tools.

Click Lookup to select a customer address. The address auto-populates.

Enter the number of copies, quantity, and weight.

Select destination preferences for each product.

Click Save .

Customer Mailing (Group Mailing)

To create and manage group mailings:

The Customer Mailing Webpage Dialog opens.

Products are organized by Product Group and Product Alias selections that are available at the top left of the dialog window.

However, both the product and its aliases are included in the mailing.

Select desired products using the corresponding checkboxes.

Use navigation arrows to move products to/from the Selected for Mailing section: Down arrow – Add selected products. Double down arrow – Add all products. Up arrow – Remove selected products. Double up arrow – Remove all products.

Down arrow – Add selected products.

Double down arrow – Add all products.

Up arrow – Remove selected products.

Double up arrow – Remove all products.

Enter a partial name in the Customer name is like field to match customers. Entering a partial name sends the mailing to any customer whose name is “like” the entered text.

Click Search to select a Date Range .

In the Parameters section, select Language , Format , Subformat , and Letter using the Search buttons and filtering tools.

Click Process to create the mailing request.

A Message from Webpage Dialog opens, indicating that the request was successfully submitted to the Job Queue. Click OK .

Mass Mailing

To create and manage mass mailings:

In the Product section, the mass mailing may be set up for a product group, text phrase or specific CAS number. Choose one of the following:

Product Group – Click Search , then use the filtering tool.

Text Phrase – Select a format, then a phrase using Search and filtering.

CAS Number – Select a component using Search , then enter a limit percentage.

In the Document Type section, a date range and document type for the mass mailing.

To select a date range, click the button to the right of the Date Range field.

The Select Date Range Webpage Dialog opens:

Select a desired start and end date for the range, then click OK .

Choose one or more document types:

Report – Customer report.

Letter – Customizable SDS request letter.

MSDS – Individual SDS.

Select Language , Format , Subformat , and Letter using Search and filtering.

In the Gather MSDS Requests section, select how the database should obtain lists of SDS requests and customer mailing addresses.

Gather MSDS Requests All – Compiles all previously requested SDSs, including those that were not sent. Sent Only – Includes only previously sent SDCompiles only the SDSs that were previously sentSs.

All – Compiles all previously requested SDSs, including those that were not sent.

Sent Only – Includes only previously sent SDCompiles only the SDSs that were previously sentSs.

Customer Address Type From MSDS Request – Obtains the customer mailing address from the most recent MSDS request. Current – Obtains the customer mailing address from the available addresses in the customer database.

From MSDS Request – Obtains the customer mailing address from the most recent MSDS request.

Current – Obtains the customer mailing address from the available addresses in the customer database.

Eliminate Duplicates On customer and address — Eliminate customer/address duplicates when reporting On customer address and product — Eliminate customer/product duplicates when reporting

On customer and address — Eliminate customer/address duplicates when reporting

On customer address and product — Eliminate customer/product duplicates when reporting

Click Process to submit the request.

A Message from Webpage Dialog opens, indicating that the request was successfully submitted to the Job Queue. Click OK .

Document Distribution

To distribute multiple SDSs to a customer:

Select Format , Subformat , Language , Cover Letter , and Customer using Search and filtering.

In the Product Groups section, double-click to select groups. Selected groups appear in the adjacent field.

Click Next . The form updates to show selected product groups.

Choose one of the following:

Click Submit to create the distribution request. If submitted, a Message from Webpage Dialog opens, indicating that the request was successfully submitted to the Job Queue. Click OK .

Click Previous to return to the edit form.

Click Cancel to close the dialog.

For more information, please visit: https://wercs.helpdocsonline.com/customer-list

Product Groups

Organizing Products into Groups for Distribution

Use the Product Groups tab to create and manage product groupings for SDS distribution and authorization control.cf

Create a New Product Group

Click the Add New button in the Product Groups section. The New Product Group Webpage Dialog opens.

Enter a Code and Description for the group.

Add Products to a Group

To add products:

The Add New Product Webpage Dialog opens. Use the Filtering tool to select and add products to the group.

Product Group Right-Click Options

Right-click a product in the group to access the following options:

Group Authorization

Use this option to update the authorization level for an entire product group.

Select Group Authorization .

The Group Authorization Webpage Dialog opens.

Select a Product Group , Format , and SubFormat .

Product Group Wizard

Use the Product Group Wizard to simultaneously add multiple products to a group.

Check In/Out

Use this option to assign or reassign product group access.

Select Check in/out .The Assign/Reassign Product Group Webpage Dialog opens.

Select a User Name .

For more information, please visit: https://wercs.helpdocsonline.com/product-groups

Product Aliases 2

Managing Product Aliases for SDS Tracking

Use Product Aliases to manage alternate product names used for SDS tracking and distribution.

Access the Product Aliases Form

For detailed guidance on alias configuration and usage, refer to Power Author Plus .

For more information, please visit: https://wercs.helpdocsonline.com/product-aliases-2

Aliases With Attributes

Configuring Alias Attributes for Enhanced Identification

Use Aliases with Attributes to manage product aliases that include attribute-level data for enhanced tracking and identification.

Access the Aliases with Attributes Form

For detailed guidance on managing alias attributes, refer to Power Author Plus .

For more information, please visit: https://wercs.helpdocsonline.com/aliases-with-attributes

Hazardous Products

Tracking and Reviewing Hazardous Product Components

Use the Hazardous Products tab to manage and review hazardous products and their associated components stored in the database.

Access the Hazardous Products Form

The Hazardous Components Webpage Dialog opens, displaying:

A list of hazardous components within the selected product.

The percentage of composition for each component.

For more information, please visit: https://wercs.helpdocsonline.com/hazardous-products

Cover Letter

Customizing Cover Letters for SDS Distribution

Use the Cover Letter tab to manage your company's SDS cover letter templates used during document distribution.

Access the Cover Letter Form

The Cover Letter form opens, enabling you to view, edit, and configure templates used to accompany SDS documents.

For detailed guidance on managing cover letter templates, refer to Power Author Plus .

For more information, please visit: https://wercs.helpdocsonline.com/cover-letter

Suppliers

Maintaining Supplier Information for Document Management

Use the Suppliers tab to manage supplier contact records used in conjunction with DocuWERCS for SDS distribution and document tracking.

Access the Suppliers Form

For more information, please visit: https://wercs.helpdocsonline.com/suppliers

Sites

Managing Site Details for Alternate Materials

Use Sites in the Material Management module to manage site records linked to suppliers and alternate materials.

Access the Sites Form

To create a new site, click the Add New button. The Modify Site Webpage Dialog opens.

Enter the Name and Comments for the site.

Enter the Address using the corresponding Search buttons. For more details on address management, see Editing and Assigning Address for Distribution and Records .

The Active checkbox is selected by default. To deactivate the site, clear it.

Edit or Delete a Site

To modify an existing site:

Click on the row of the site you want to edit.

Click the Edit button.

To delete a site:

Click on the row of the site you want to remove.

Click the Delete button.

Note: These buttons remain disabled until a row is selected.

Note: These buttons remain disabled until a row is selected.

Additional Site Management Tools

Use the icons at the top of the form to:

Filter – Apply criteria to narrow down the site list.

Refresh – Reload the current site data.

Export – Export the site list for external use.

For more information, please visit: https://wercs.helpdocsonline.com/sites

Emergency Contacts

Storing Emergency Contact Information for Compliance

Maintain emergency contact records used in compliance-sensitive Studio modules such as PCN and Material Management by accessing the Emergency Contacts form.

Accessing the Emergency Contacts Form

Adding a New Emergency Contact

To create a new emergency contact record, follow these steps:

Click Add New to open the Emergency Contact Webpage Dialog.

Enter the Address using the corresponding Search buttons. For more details on address management, see Editing and Assigning Address for Distribution and Records .

Enter the requested information into the relevant fields.

Editing or Deleting an Emergency Contact

To update or remove an existing emergency contact:

Select the row for the contact you want to modify.

Click Edit to update the contact information or click Delete to remove the contact. These options remain disabled until a row is selected. (These options remain disabled until a row is selected.)

Filtering, Refreshing, and Exporting Contact Data

Use the icons at the top of the form to manage the contact list:

Use the Filter icon to narrow down the displayed records.

Use the Refresh icon to reload the contact list.

Use the Export icon to download the contact data.

For more information, please visit: https://wercs.helpdocsonline.com/emergency-contacts

Addresses

Editing and Assigning Addresses for Distribution and Records

Associate addresses with Suppliers, Sites, or Emergency Contacts using the Addresses form.

Accessing the Addresses Form

Adding a New Address

To create a new address record:

Click Add New to open the Modify Address Webpage Dialog.

Enter the requested information into the relevant fields.

The No VAT checkbox is auto-selected. Clear the checkbox to associate a VAT number with the new address.

Click Save .

Editing an Existing Address

To update an existing address:

Select the row for the address you want to modify.

Click Edit to open the Modify Address Webpage Dialog. This option remains disabled until you select a site.

Filtering, Refreshing, and Exporting Address Data

Use the icons at the top of the form to manage the address list:

Use the Filter icon to narrow down the displayed records.

Use the Refresh icon to reload the address list.

Use the Export icon to download the address data.

For more information, please visit: https://wercs.helpdocsonline.com/addresses

Label Print Station

Welcome to Label Print Station

Label Print Station allows you to print labels from dynamic label templates created in Label Designer and add data to a label at the time of printing. It supports flexible label generation workflows by enabling real-time data entry and template-based printing.

With Label Print Station, you can:

Print labels from dynamic label templates created in Label Designer

Add data to a label at the time of printing

Key functional Areas

Template-Based Printing – Generate labels using dynamic templates created in Label Designer.

Real-Time Data Entry – Enter and apply label-specific data during the printing process.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/label-print-station

Application Overview 4

Accessing Label Print Station

This section gives a brief overview of the Label Print Station, including how to access it from WERCS Studio, and a summary of the options.

Label Print Station access

From the Distribution menu, select Label , then select Print Station .

Label Station Main form

The Label Station Main form is broken out into four areas:

Printing Options – Product, language, and label template selections for this label printing session.

Data Fields – Entry of data for the required fields for the label.

Printing Tools – Various printing tools and additional options.

Label Preview – Preview of the label being printed.

Configuring application settings

Prior to use, your Customer Service Representative must set up your labeling system, based on the requirements set up in the Label Designer. These settings affect which labels you can access, and how product data is used within a label. Additional information about these settings can be found in the Label Designer help.

IMAGE_LIBRARY

For more information, please visit: https://wercs.helpdocsonline.com/application-overview-4

Printing Labels

Print custom labels using templates and data inputs

Use the Print Station selection on the Label menu in Distribution to print customized labels using predefined templates and data inputs. This is useful for generating labels for inventory, shipping, or product identification.

Printing custom labels

In the Label templates field, then use the Filter button to select a label template previously created in the Label Designer .

After you have selected your desired options, a preview of the label template appears on the right-hand side of the form. Using the Zoom field, you adjust the zoom of the label preview.

Some label templates require certain fields to be populated with data. These fields are specific to the selected label template, and control the information that appears on the label. To refresh the Label Preview:

Enter the required data in the fields in the Template Field List section.

After you edit a field, click Refresh to update the information in the label preview.

Select the type of label you want to produce:

PNG - Portable Network Graphics file.

PDF - Printed PDF preview.

If you selected PDF , a PDF preview of your label appears. Click the Print icon to designate print options for the session.

When the Print dialog appears:

Select your desired printer, number of copies, number of pages, and indicate if you require collation.

You can also modify the orientation of the document for this printing. This does not change the template's saved orientation.

After selecting printing options and entering all required data, click Print (or the Print icon) to print the label. Your label should now print out correctly.

If this is the first time printing, you are prompted to run an installer. Click Run .

To view a history of all labels that have been printed in previous printing sessions, click View Print History . If the application preferences are set up to allow reprinting of stored documents, right-click the specific print records and then select Reprint to reprint them.

To view a history of all labels that have been printed in previous printing sessions, click View Print History . If the application preferences are set up to allow reprinting of stored documents, right-click the specific print records and then select Reprint to reprint them.

For more information, please visit: https://wercs.helpdocsonline.com/printing-labels

Using Label Designer

Using Label Designer

Label Designer requires configuration of specific Application Settings to support business-specific labeling workflows. These settings are typically managed by an Administrator or Customer Service Representative.

Accessing Application Settings

To access label-specific settings:

Open the Application Settings module.

From the Filter by parent dropdown, select Labels .

The following settings are available:

ALWAYS_GEN_DATA

This setting controls whether labels use live product data or static generated data.

Value = 1 – All labeling functions use live product data. Label output may change in real time if the product is being updated. Reprint option in Label Print Station is disabled.

Value = 0 – Final product data must be manually generated via the Product Attributes form. An XML file is created and stored in the database. Live changes do not affect label output. Product must be authorized.

GEN_DATA_ON_TEMP_CHANGE

This setting determines whether product data is regenerated when label templates are changed or finalized.

Value = 1 – Product data is automatically regenerated when a finalized template is used for an authorized product.

Value = 0 – A notification appears indicating that product label data must be generated or re-generated.

SAVE_PDF_HISTORY

This setting controls whether PDF label history is stored and available for reprint or FTP.

Value = 1 – PDF label history is stored and can be reprinted or sent via FTP. Requires additional settings: FTPSERVER , FTPUSERNAME , FTPPASSWORD , FTPDIRECTORY . ■■ May cause database growth depending on label volume.

Value = 0 – PDF history is not stored. Reprint and FTP functionality are unavailable.

LB_DATACODE

This setting enables product-to-template locks using assigned text codes. Products/aliases display only the templates they are assigned to on the All Published Documents form.

Use short data codes (1–2 characters) for better scalability.

Assign default LB data code to allow access to all templates.

Create phrases matching label names (excluding file extensions) and assign them to products.

Example

Template name: WERCS_DEMO1.lbx

Family/Datacode: LB

Phrase: Textcode LB000005 with phrase WERCS_DEMO

LABEL_ORIENTATION_FLAG

This setting controls how orientation sizes behave when orientation selection changes.

Value = 1 – Orientation sizes flip when orientation selection changes.

Value = 0 – Orientation sizes remain fixed when orientation selection changes.

Original Content - Accessing Label Designer

Label Designer Access

To access Label Designer:

Open WERCS Studio .

From the Distribution menu, select Label , then select Designer .

The first time Label Designer is launched; the following pop-up appears. Click the Run button.

Files are stored in the temp directory, and in the future, this installation form only appears if there are system updates.

2.2 Label Designer Main Form

The main form of Label Designer is broken-out into four areas:

Menus and Action Buttons – The various menu options for Label Designer and shortcuts to common menu items and additional tools.

Menus and Action Buttons – The various menu options for Label Designer and shortcuts to common menu items and additional tools.

Design Tools – The tools utilized for creating labels.

Design Tools – The tools utilized for creating labels.

Work Grid – The workspace area for designing labels. (The label appears here as it is created).

Work Grid – The workspace area for designing labels. (The label appears here as it is created).

Design Tools Properties – The specific properties for the currently selected design tool.

Design Tools Properties – The specific properties for the currently selected design tool.

System Setting – In Windows 10, change the Windows Display Setting: Scale and layout > Change the size of text, apps, and other items to 100%. Using Windows recommended setting of over 100% do not resize and align text properly in Label Designer.

2.3 Application Settings

Label Designer requires setting up certain Application Settings that control how the labeling system functions, based on specific business practices. These settings are set by an Administrator or Customer Service Representative.

From the Application Settings module, select Labels from the Filter by parent dropdown menu. The Label specific Application Settings appear:

2.3.1 ALWAYS_GEN_DATA

Value = 1 – All labeling functions use live product data. If labels are being printed or published and a product is being actively updated, the label output may change in real time based on those changes. (When using live data, the Reprint option in Label Print Station cannot be utilized).

Value = 0 – The final product data used with labels must be manually generated via the Product Attributes form. This creates an XML file containing all pertinent data related to Labels, which is then stored in the database. Once the data is generated, it is used by the labeling system to product labels. Any live changes being made to the product do not affect the output of the labels. (In order to generate the data, the product needs to be authorized).

2.3.2 GEN_DATA_ON_TEMP_CHANGE

Value = 1 – If generated product data is being utilized and label template changes or is finalized, the data is automatically re-generated when that template is used for a product that also contains generated data. This updates the information that may now be needed for a label. If a new label is created and finalized, when it is used in Print Station, the selected product also has its product data re-generated (assuming the product is authorized for the label's Format/Subformat).

2.3.3 SAVE_PDF_HISTORY

Value = 1 – PDF label history is turned on (the PDF is stored along with its history record) and can be reprinted and sent to FTP support. (Using FTP also requires the following Application Settings (FTPSERVER, FTPUSERNAME, FTPPASSWORD, FTPDIRECTORY). Note* – This option can cause the database to grow substantially based on a company's labeling workload. If reprint options are not utilized, it is recommended to turn this setting off.

2.3.4 LB_DATACODE

This setting creates product to template locks, which allows products/aliases with assigned text codes to only display the templates they are assigned to on the All Published Documents form as the LB code, in addition to Custom Field 5. Application Setting: LABELS > CUSTOMFIELD5_AS_TEMPLATENAME allows you to view the product associated with the template by displaying the label template name in Custom Field 5 on the All Published Documents form.

If a high number of different labels is created, it is recommended to use data codes that are 1 to 2 characters long, based on the company's label production, because smaller data codes allow more text codes for the family. Allow access to all templates for your products by setting the text codes as a default to the LB data code Your products print with the template assigned within the Subformat.

In the designated family, phrases for each label template need to be created, and the phrases need to match the label name. (The extension file name does not need to be included). The phrase is then assigned to products designated for use. More than one template can be assigned to a product. If no text code for the designated family is assigned, then the product can be used with any finalized template.

Practical Use

Example:

Template name – WERCS_DEMO1.lbx

Family/Datacode (PTXT usage type) – LB

Phrase created – Textcode LB000005 phrase WERCS_DEMO

2.3.5 LABEL_ORIENTATION_FLAG

Value = 1 – The project orientation settings flip their orientation sizes when the orientation selection is changed.

Value = 0 – The project orientation settings maintain their orientation sizes when the orientation selection is changed.

For more information, please visit: https://wercs.helpdocsonline.com/using-label-designer

Label Designer

Welcome to Label Designer

Label Designer is a tool used to create product labels in several Formats, languages, and sizes. The graphics are customizable, including your company's logo or label Format, enabling tailored label creation for a wide range of products.

With Label Designer, you can:

Create customized labels in a variety of Formats and languages for a multitude of products

Store labels in a central WERCS Studio database

Control project options to your exact specifications

Key Functional Areas

Label Customization – Design labels using various Formats, languages, and sizes, including custom graphics and logos.

Centralized Storage – Save and manage label templates within the WERCS Studio database.

Project Configuration – Define label project settings to meet specific product and regulatory requirements.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/label-designer

Accessing Label Designer

Accessing Label Designer

Label Designer enables you to create and manage product labels using a visual design interface.

Tool Access

To access Label Designer:

From the Distribution menu, select Label , then select Designer .

Main Form

The Main form of Label Designer includes the following functional areas:

Menus and Action Buttons – Menu options and shortcuts to common actions and tools.

Design Tools – Tools used to create labels.

Work Grid – Workspace area where the label is visually designed.

System Setting Note In Windows 10, set Display Setting > Scale and layout > Change the size of text, apps, and other items to 100% . Using a setting over 100% may cause misalignment of text in Label Designer.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-label-designer

Using Label Designer 2

Using Label Designer

Label Designer requires configuration of specific Application Settings to support business-specific labeling workflows. These settings are typically managed by an Administrator or Customer Service Representative.

Accessing Application Settings

To access label-specific settings:

Open the Application Settings module.

The following settings are available:

ALWAYS_GEN_DATA

This setting controls whether labels use live product data or static generated data.

Value = 1 – All labeling functions use live product data. Label output may change in real time if the product is being updated. Reprint option in Label Print Station is disabled.

GEN_DATA_ON_TEMP_CHANGE

This setting determines whether product data is regenerated when label templates are changed or finalized.

Value = 1 – Product data is automatically regenerated when a finalized template is used for an authorized product.

SAVE_PDF_HISTORY

This setting controls whether PDF label history is stored and available for reprint or FTP.

Value = 1 – PDF label history is stored and can be reprinted or sent via FTP. Requires additional settings: FTPSERVER , FTPUSERNAME , FTPPASSWORD , FTPDIRECTORY . ■■ May cause database growth depending on label volume.

LB_DATACODE

This setting enables product-to-template locking by using assigned text codes. On the All Published Documents form, products and aliases display only the templates they are assigned to.

Use short data codes (1–2 characters) to improve scalability.

Assign the default LB data code to allow access to all templates.

Create phrases that match label names (excluding file extensions) and assign them to products.

Use the setting LABELS > CUSTOMFIELD5_AS_TEMPLATENAME This displays the label template name in Custom Field 5 on the All Published Documents form, enabling you to view the product associated with each template.

If your company creates a high number of different labels:

Use 1–2 character data codes to maximize the number of available text codes per family.

Assign the LB data code as a default to allow products access to all templates.

Products print using the template assigned within the Subformat .

In the designated family:

Create phrases for each label template.

Ensure each phrase matches the label name (excluding the file extension).

Assign phrases to products designated for use.

A product can be assigned to multiple templates.

If no text code is assigned for the designated family, the product can be used with any finalized template.

Template name: WERCS_DEMO1.lbx

Family/Datacode: LB

Phrase: Textcode LB000005 with phrase WERCS_DEMO

LABEL_ORIENTATION_FLAG

Value = 1 – The project orientation settings flip their orientation sizes when the orientation selection is changed.

Value = 0 – The project orientation settings maintain their orientation sizes when the orientation selection is changed.

For more information, please visit: https://wercs.helpdocsonline.com/using-label-designer-2

Creating Label Projects

Design and Build New Label Projects

This section outlines the process for creating new label projects and using the available design tools. Before starting a project, ensure all configuration preferences are set to exact specifications. For details on establishing preferences, refer to the next chapter.

To begin a new label project:

To save a project:

To rename a previously saved template:

Enter a new name in the Name field, located in the Label's design properties,

Print Current Project

To print the current project or view a print preview:

To print finalized label templates, use the Label Print Station module. See the Label Print Station reference for more details.

For more information, please visit: https://wercs.helpdocsonline.com/creating-label-projects

Label Designer Tools

Create Label Elements Using Design Tools

Label Designer includes several tools for creating label elements.

To use a tool:

Once placed, the design properties for the selected tool appear.

Line Tool

The Line tool enables you to draw lines of various thicknesses.

Design Properties: The Line tool also provides the ability to adjust the following design properties in real time in the workspace:

Position – Adjust using directional arrows or enter measurements manually.

Rectangle/Ellipse Tool

The Rectangle/Ellipse tool enables you to insert boxes or ellipses.

Design Properties:

Position – Adjust using directional arrows or enter measurements manually.

Border – Adjust thickness and color.

Fill – Select a color from the palette.

Gradient Fill & Properties – Apply gradient patterns and configure display options.

Picture/Graphics Tool

The Picture/Graphics tool enables you to insert images or graphics.

Design Properties:

Position – Adjust using directional arrows or enter measurements manually.

Border – Adjust thickness and color.

To add revision or published date formats:

Barcode Tool

The Barcode tool enables you to insert barcodes.

Design Properties:

Position – Adjust using directional arrows or enter measurements manually.

Border – Adjust thickness and color.

Barcode Type – Select from the dropdown menu.

Rotation – Choose orientation from available options.

Alignment – Adjust barcode alignment.

Static Text – Enter a fixed value.

Dynamic Text – Link to a WERCS Studio data code.

Show Text – Select checkbox to display barcode value.

Text Tool

The Text tool enables you to insert static text or dynamic text linked to Subsections and data codes.

Design Properties:

Position – Adjust the position of the text box by clicking the directional arrow buttons located next to a specific position element or manually enter in the measurements in the provided fields

Border – Adjust the thickness of the border by clicking the directional arrow buttons. The color of the border can also be adjusted by clicking the Border field.

Fill – Fill the text box with a solid color by selecting the checkbox and clicking the associated field. Then, select a color from the palette window

To insert Subsections or data codes:

Multiple languages can be entered in a text box for Component Tables and Component Lists.

Templates – Template fields assigned to the active template.

XGROUP – Mix data codes in a text box (see the following section for additional details).

DMDY – Date usage type fields included in the assigned Subformat.

Graphics – Displays a list of all GRPH Subsections available on the selected Subformat. (Supported formats: .WMF, .JPG, .PNG)

Text Phrases – Displays a list of all PTXT Subsections available on the selected Subformat.

Data Values – Displays a list of all PVAL Subsections available on the selected Subformat.

Captions – Displays a list of all SUBH Subsections available on the selected Subformat.

Revision dates – Displays a list of all REVD Subsections available on the selected Subformat.

Revision numbers – Displays a list of all REVN Subsections available on the selected Subformat.

Other – Displays usage types not otherwise defined, such as LST Subsections available on the selected Subformat.

XGROUP

The XGROUP feature enables you to combine multiple data codes in a single text box, supporting multiple languages.

Select Include Caption and choose a caption.

Choose a Join By option.

Syntax Examples:

With caption: {language}{XGROUP::CAPTION::JOINBY}

Without caption: {language}{XGROUP::JOINBY}

Data code: {t|PTXTCODE}

Artistic Text Tool

The Artistic Text tool enables you to insert rotatable text boxes.

The Artistic Text tool allows for the adjustment of the following design properties:

Position – Adjust the position of the text box by clicking the directional arrow buttons next to a specific position element, or manually enter measurements in the provided fields.

Border – Adjust the border thickness using the directional arrow buttons. You can also change the border color by clicking the Border field.

Fill – Fill the text box with a solid color by selecting the checkbox and clicking the associated field. Then, choose a color from the palette window.

Rotation – Adjust the rotation of the text box by clicking the directional arrow buttons or manually entering the rotation degree in the provided field.

Edit Text – Create and format static text, or select and format linked text values from Subsections and data codes. (Additional information about this form is available in the previous section.)

Select Product

After a label template has been created, the label can be viewed with specific product data applied. (It is recommended to save the label prior to selecting a product.)

To apply a product to the label, select a product from the database using the design properties section for the project.

Accessing the Select Product Form

The Select Product pop-up opens.

Select Product

After a label template has been created, the label can be viewed with specific product data applied. (It is recommended to save the label prior to selecting a product.)

To apply a product to the label, select a product from the database using the design properties section for the project.

Accessing the Select Product Form

Products may be unavailable based on security settings or authorization levels.

If you do not have access to a product, it does not appear in the list.

If a product is not authorized for display with the selected template, a message appears indicating that the product cannot be used.

After selecting a product:

Click the directional arrows to browse previous or next products in the database.

Apply Data

When designing labels, the design tools default to display the data code. To show actual data in the label instead of data codes, use the Apply Data checkbox.

Applying Data to the Label

Ensure no controls are highlighted.

Select the Apply Data checkbox. Alternatively, click on the work grid and press Enter to select the checkbox.

Alternatively, click on the work grid and press Enter to select the checkbox.

Lock Objects

Selecting the Lock Objects checkbox in the Design Properties section locks all objects on the label, preventing them from being moved.

Locked objects can still be edited using the Properties form.

Front and Back Layers

Label objects can be arranged in top and bottom layers (for example, a rectangle box with a picture on it).

Adjusting Object Layer Position

Select an object.

For more information, please visit: https://wercs.helpdocsonline.com/label-designer-tools

Project Menu

Manage Label Projects and Configuration Settings

Import

Import enables you to bring pre-existing 6.1 label templates into the WERCS Studio database.

To import label templates:

Click Browse to locate the label templates (.lbx files).

Click Start to begin the import process. If a template name matches an existing one, a prompt appears to assign a new name or skip the template using Skip Template .

Once complete, an Import Complete message appears and the templates are available for use.

Versioning

Versioning enables you to archive and manage multiple versions of label templates. Older versions are read-only and serve as historical references. To modify a past version, save it as a new project or version it to create an editable copy.

To version a template:

Click Finalize Template and update to Version “X” to save the current version and create a new editable version.

The most current version is the Active Finalized Version , which Print Station and Publisher use; it cannot be modified.

The most current version is the Active Finalized Version , which Print Station and Publisher use; it cannot be modified.

Scripting

Scripting enables you to add or edit scripts that run before label rendering in Print Station and Publisher. Scripts are stored in the database and written in JavaScript.

There are three script types:

Wercs – Not editable but can be read and contain notes on how to use. (These methods are used to communicate and manipulate the template).

Common – Editable scripts that can contain common methods to be used by all template scripts. Multiple Common files can be created to allow for organization.

Template – Scripts specific to individual templates.

Each template script must include the entry method: function Wercs_RunTemplateScript(templateID)

Each template script must include the entry method: function Wercs_RunTemplateScript(templateID)

The entry method must exist in the template script for each template that scripts are to be run on. This method then can call WERCS or COMMON script methods.

Only one Template script is allowed per template. Multiple common or Wercs functions must be called from within that script.

To manage scripts:

Choose the script type from the dropdown.

After editing, click Save .

Resize Label

Resize Label enables you to save a new project based on an existing one, using a different size or scale.

To resize a label:

Select Resize Label from the Project menu.

Enter a new project name.

Select a new size.

Application Preferences

Application Preferences control workspace grid settings, page options, and database settings for the project. To access preferences, select Application Settings from the Project menu.

The Editor tab allows for the adjustment of the work grid ruler type, (metric or U.S), and the size and line color of the work grid:

Page Options Tab

Project Options

Project Options control various project-level settings.

To access options, select Project Options from the Project menu.

The window opens with the Print and Format tab selected.

Print and Format Tab

Use this tab to configure options specific to the label template.

Label Size – Set width and height of individual labels.

Guidelines – Define design-only guideline boxes.

Margins – Override Application Settings margins using the Use Template Level Margins checkbox.

Print – Assign a printer to the template.

Labels per Page – Set number of labels across and down per page.

Orientation – Choose Portrait or Landscape.

General Tab

This tab allows entry of comments and configuration of defaults and component display options.

Label Comment – Informational note about the label.

Paper Stock Comment – Informational note about paper stock.

Image Path – Path to image files (local or network).

Defaults – Set default product, Format, Subformat, and language.

Components – Configure component display: Max – Max number of chemicals. Order by – CAS, Chemical Name, or percentage. Hazardous Only – Show only hazardous components. Borders – Display borders on component lists. N/A Message – Message when no components are available. Model – Default formulation model.

Max – Max number of chemicals.

Order by – CAS, Chemical Name, or percentage.

Hazardous Only – Show only hazardous components.

Borders – Display borders on component lists.

N/A Message – Message when no components are available.

Model – Default formulation model.

Text Outline – Show borders around text boxes.

Template Field Tab

Define fields that accept data at publishing time (e.g., tracking numbers, lot numbers).

To add a field:

Click Add New .

The Template Field pop-up opens, allowing entry and selection of the following:

Name – Name of the template field that is referenced when retrieving template fields in Label Designer.

Description – Short description of what the field contains.

Type – Select one of the following field types from the dropdown menu:

Text – Display manually entered text or a Subsection ID.

AutoNumber – Create a counter on the labels. (Enter a starting number in the Value field).

Calculated – Perform calculations with manually entered numeric data, PVAL data, or both.

Date – Add different date formats as template fields. See Custom date and time format strings | Microsoft Learn document for date/time formatting options.

Value – Default value for the selected template field type.

Hidden – If selected, the field is not visible on the label and is only available to enter data from the print station. (This is useful for internal documentation for label print jobs such as the operator id, or other identifying information).

Locked – If selected, the field is not editable, and the position of the field on the work grid cannot be manually moved.

Clear List on Load – If selected, calculated fields and counters are reset on each load of the label in the print station. (This option is also available in Print Station).

Security Tab

Define which users can access specific labels in Label Designer, Print Station, and Publisher.

Only Full Access and No Access are applicable at the template level.

Value 2 = Full Access

Default Text Tab

Export

Export enables you to transfer labels to another system or create a local backup.

To export:

Select Export… from the Project menu.

Filter and select templates.

Restore

Security

For more information, please visit: https://wercs.helpdocsonline.com/project-menu

Label Publisher

Welcome to Label Publisher

Welcome to the Label Publisher reference. Label Publisher is a tool for generating published documents from the label templates created in Label Designer.

With Label Publisher, you can:

Generate published documents from the label templates created in Label Designer.

Generate published documents from the label templates created in Label Designer.

Publish documents for multiple products, languages, and templates simultaneously.

Publish documents for multiple products, languages, and templates simultaneously.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

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Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/label-publisher

Application Overview 5

Accessing Label Publisher

This section gives a brief overview of Label Publisher, including how to access it from WERCS Studio, and a summary of the options.

Label Publisher access

From the Distribution menu, select Label , then select Publisher .

Label Publisher Main form

The Label Publisher Main form is broken out into two areas:

Product Groups – Select a product group.

Product Groups – Select a product group.

Publishing Options – Select your desired publishing options, including the Format, Subformat, Plant, Web Availability, and Paper Settings.

Publishing Options – Select your desired publishing options, including the Format, Subformat, Plant, Web Availability, and Paper Settings.

Publishing Language – Select your desired publishing language(s).

Publishing Language – Select your desired publishing language(s).

Label Templates – Select your desired label template(s) and various template options.

Label Templates – Select your desired label template(s) and various template options.

For more information, please visit: https://wercs.helpdocsonline.com/application-overview-5

Publishing Labels

Publish labels for multiple products and languages

The publishing process generates the label as a PDF document and also creates a permanent record that cannot be altered or deleted through the module.

Publishing labels

In the Label Publisher Main form, use the Filtering tool and select the checkboxes for the product group(s) being published.

In the Options section, select the following publishing options:

Format – Format for the published document(s).

SubFormat – Subformat for the published document(s).

Plant – Select the plant for the published document(s).

Web Availability – Specify what web destination the documents should be published to:

Intranet Viewer

Internet Viewer

Both Viewers

Orders Interface

Not Available for any viewers (Authorization Value).

Paper Settings – Select your paper size and orientation (Portrait or Landscape)

In the Languages section, use the Filtering tool and select the checkboxes for the languages being published.

In the Templates section, use the Filtering tool and select the checkboxes for the templates being published.

Select your desired template options:

Select your desired template options:

Publish template for all aliases of Products – Publish templates for the aliases of the product groups.

Do not unauthorize previous documents – Preserve the authorization of previously published documents.

Run scripts on publish – Run previously created scripts.

Once the job is complete, your published document is available in the Published Documents dialog in Power Author Plus and Power Designer Plus .

Once the job is complete, your published document is available in the Published Documents dialog in Power Author Plus and Power Designer Plus .

For more information, please visit: https://wercs.helpdocsonline.com/publishing-labels

Report Writer

Welcome to Report Writer

Welcome to the Report Writer module. Report Writer is a tool for utilizing SQL statements to create and view reports to your exact parameters. You can print these reports for your records or export them to Excel.

With Report Writer, you can:

Create SQL statements to find data quickly and easily within your WERCS Studio database.

Design and customize your reports to your exact parameters.

Lookup information for products, components, sections, and phrases.

Key Functional Areas

SQL Statement Builder – Create and execute SQL queries to retrieve targeted data from your WERCS Studio database.

Report Designer – Customize report layouts, filters, and output formats to meet specific reporting needs.

Data Lookup Tools – Access reference data for products, components, sections, and phrases to support report creation.

Export Options – Export reports to Excel for further analysis or recordkeeping.

Print Reports – Generate printable versions of reports for documentation or distribution.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

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For more information, please visit: https://wercs.helpdocsonline.com/report-writer

Accessing Report Writer

Accessing the Report Writer

Report Writer Access

From the Distribution menu, select Report Writer .

Report Writer Main Form

The Report Writer opens with the Viewer tab selected. The form is broken out into three areas:

Navigational Tabs: Navigate to the various features in Report Writer.

Saved Reports: Select and run previously created reports.

Report Parameters: Manage the parameters of your selected report.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-report-writer

Creating Saving Adhoc Reports

Creating and Saving AD HOC Reports

Ad Hoc Reports enable you to query products that contain specific phrases or values.

Adding a Filter

To create an Ad Hoc report:

Click AD HOC REPORTS, then click Add filter .

In the Add/Edit Filter Condition Webpage Dialog , click the button to the right of the Subsection field. and use the Filtering tool.

Selecting Filter Criteria

Depending on the filter type:

If you select a PTXT option: The Phrase (=) section appears. Click the Phrase button and use the Filtering tool to select a phrase.

If you select a PTXT option:

The Phrase (=) section appears.

Click the Phrase button and use the Filtering tool to select a phrase.

If you select a PVAL option: Select a condition from the Condition dropdown menu. Enter a value in the Value field.

If you select a PVAL option:

Select a condition from the Condition dropdown menu.

Enter a value in the Value field.

Click Add to apply the filter.

Managing Filters

Right-click a filter to add another filter, edit it, or delete it.

Saving and Running the Report

Once all filters are added:

Click Save Report . The report appears in the Existing Reports section.

Click Run Report to execute it.

A form similar to the Product Lookup form opens, displaying your filtered results.

To return to the Ad Hoc Reports form, click Ad Hoc Reports .

For more information, please visit: https://wercs.helpdocsonline.com/creating-saving-adhoc-reports

Viewing Exporting Reports

Viewing and Exporting Reports

The Report Writer Viewer enables you to view and export previously created reports.

Viewing a Report

To view a report:

Select a report from the Saved reports dropdown menu.

Click Run report .

Exporting a Report

To export the report to Excel or to a PDF:

Select a format from the dropdown menu.

Select Excel or Acrobat (PDF) file . If you select the latter, you can save or download the file in the Acrobat Viewer.

You can add parameters to filter reports to your specifications. Available options vary by report.

To add a report parameter:

Select the checkbox for the desired parameter type.

To select all types, click the Toggle All checkbox, and click the button to the right of the selected parameter field (in this example, Product).

Use the Filtering tool to select your parameters.

For more information, please visit: https://wercs.helpdocsonline.com/viewing-exporting-reports

Managing And Running Sql Reports

Managing and Running SQL Reports

Use the following procedures to create strings, design, schedule and run SQL-based reports.

For more information, please visit: https://wercs.helpdocsonline.com/managing-and-running-sql-reports

Managing Sql Strings

Creating and Managing SQL Strings

The SQL tab enables you to create and manage SQL strings to search the WERCS Studio database.

Creating a SQL String

To create a new SQL string:

Click SQL, and then click New .

Enter a name in the Description field.

Enter your SQL string in the SQL Statement field.

Click Save .

A confirmation dialog appears. Click OK .

Running a Save SQL Query and Using the SQL Editor

To run a saved SQL query:

Select a report from the SQL Queries dropdown menu.

To run the SQL statement, click Execute . Results appear at the bottom of the form.

To adjust the number of displayed records:

Use the Records to display dropdown menu.

Use the scroll bar to view additional columns.

To view the database schema:

Click the Show link. The schema appears on the left side of the form.

To collapse the SQL editor when it's expanded:

Click Collapse Editor .

To expand the SQL editor when it's collapsed:

Click Expand Editor .

To view messages related to your results:

Click the Messages tab.

For more information, please visit: https://wercs.helpdocsonline.com/managing-sql-strings

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Designing SQL Reports

The Designer tab enables you to create and customize SQL reports to meet specific parameters.

Creating a New Report

To design a report:

Click DESIGNER , then click New Report .

Select any additional reporting options by clicking the appropriate checkboxes.

Enter a SQL string in the SQL String field.

Click Save Report .

Saved reports appear in the Existing Reports dropdown menu.

Adding Parameters

To add a parameter:

Click Add parameter .

In the Query Parameters List , enter a name in the Parameter Name field.

To enable multiple selection or key field functionality, select the Multiple Selection and/or Key Field checkboxes.

Select a parameter type from the Type dropdown menu.

If the parameter type requires a subsection, click the button to the right of the Subsection field, then use the Filtering tool to select a subsection.

Adding Columns

To add a column:

Click Add column heading .

In the Column List , enter a heading in the Column Heading field.

Enter a width value in the Column Width field.

For more information, please visit: https://wercs.helpdocsonline.com/kmooviuitj5uncrqofal

Scheduling Recurring Reports

Scheduling Recurring SQL Reports

The SQL tab also enables you to schedule recurring reports to run at a specified time or date.

Creating a Scheduled SQL Report

To create a scheduled report:

Click SQL , and then click Scheduled Report .

In the Batch Job Scheduling Webpage Dialog , enter a job name in the Report Name field.

Select your SQL statement from the dropdown menu.

Export Options

To choose an export format:

In the Export Options section, click the checkbox for your desired format.

HTML - Hypertext Markup Language

XML - Extensible Markup Language

CSV - Comma Separated Values

Schedule Options

To set the report frequency:

In the Schedule Options section, select how often you want the report to run.

Saving the Scheduled Report

After selecting your options:

Click Save .

When the Message from webpage dialog appears, click OK to confirm submission to the Job Queue.

Editing a Scheduled Report

Once you have created a scheduled report, you can edit the scheduling options. Follow the steps related to editing a job in the Job Queue Core Functionality topic in Job Queue .

For more information, please visit: https://wercs.helpdocsonline.com/scheduling-recurring-reports

Report Lookup Features Tools

Using Lookup Tools for Products, Components, and Phrases

When creating and running reports, you look up products, components, section information and phrases.

Product Lookup

You can look up products and their associated information in the Product Lookup tab:

Component Lookup

You can also look up components and their associated information in the Component Lookup tab:

Section Lookup

The Section Lookup tab enables you to view the Format, Subformat, and Section where various Subsections are utilized. This is useful for both reporting purposes and data management.

Phrase Lookup

Phrase Lookup enables you to search for both specific phrases within a phrase family and particular words in phrases.

For more information, please visit: https://wercs.helpdocsonline.com/report-lookup-features-tools

Accessing Dte Web Interface

Accessing the DTE web interface

Access the DTE Web Interface to manage and interact with DTE-related data directly from WERCS Studio.

Module access

The Main form includes functional areas enabling you to:

View and manage DTE records.

Navigate between DTE modules.

Access configuration and setup options.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-dte-web-interface

Dte 2

DTE

The Data Transfer Engine (DTE) menu centralizes data operations for products, orders, labels, inventory, and regulatory tracking. It supports both automated and manual workflows for configuration, processing, and validation, ensuring consistent, traceable, and flexible integration across environments.

The module is organized into functional sections for interface setup, job processing, data migration, and diagnostics. Each section includes tools for managing configurations, analyzing ITable data, and executing interface-specific tasks.

Key functional areas

This menu includes the following functional areas:

Analyze ITable Data – View and filter interface-specific data stored in the database.

Data Migration – Migrate label and order data between systems using extract settings and migration tools.

Inventory – View and analyze inventory-related ITable records and configuration settings.

Labels – Configure label formats, printers, and history tracking, with support for manual label processing and migration.

Product Import and Export – Manage inbound and outbound product data using XML formats, validation settings, and process group configurations.

Orders – Run pre- and post-processing tasks, manage customer orders, configure document delivery, and view historical records.

Product Import Export – Manage the full lifecycle of importing or exporting product data into or from the I_PROCESS and associated ITables.

Product XML Import Export – Export and import product records using structured XML formats.

Substance Volume Tracking – Track and validate regulatory volume data across interfaces.

System Tools – Manage service monitors, verify ITable structures, and configure interface schedules and settings.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

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For more information, please visit: https://wercs.helpdocsonline.com/dte-2

Analyze Itable Data

Analyze ITable Data overview

The Analyze ITable Data interface in the DTE Web system provides a flexible interface for viewing and exporting ITable records stored in the database. This tool supports data validation, troubleshooting, and interface monitoring by enabling users to filter records by interface type, table, field, batch ID, job ID, and date range.

Users can select specific fields and batch IDs to narrow down results, apply filters to sort by status or remarks, and export the data to Excel for offline analysis. The form dynamically adjusts to reflect the selected criteria, making it easy to inspect and verify interface-related data in real time.

This section is especially useful for monitoring automated processes, validating test data, and reviewing interface activity across different environments.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/analyze-itable-data

Analyze Itable Data Dte

View and export ITable data in DTE

Use the Analyze ITable Data form to view, filter, and export ITable records stored in the database. This interface enables you to inspect data by interface type, table, batch ID, job ID, and date range.

Module access

Main form

Filtering and viewing ITable records

Follow these steps to view and filter ITable data:

Select your desired Interface Type from the dropdown menu. The form updates to display available ITables.

Select your desired ITable from the dropdown menu.

Select the fields you want to view by selecting the appropriate checkboxes.

Choose a Batch ID from the dropdown menu, or select All to view all Batch IDs.

Optionally, enter a Job ID to filter results by job.

To filter by remarks, select the Remarks checkbox.

If you selected Batch ID: All , results are limited to the selected date range.

Use the date picker to define your desired date range.

Exporting results

To export the displayed data in Excel format, click Export .

For more information, please visit: https://wercs.helpdocsonline.com/analyze-itable-data-dte

Dte Data Migration 2

Data Migration Overview

The Data Migration interface in the DTE Web system enables users to manually configure and execute data transfers between source and target systems. This interface supports both file-based and database-based migrations, providing tools to define extract parameters, map fields, preview data, and run post-processing scripts.

Data Migration is designed to accommodate complex data movement scenarios, allowing users to create reusable extract configurations, align source and target tables, and validate field mappings before initiating the migration. It also includes manual migration tools for quick one-off transfers and supports previewing data at each stage of the process.

Key Functional Areas

Key functionality includes:

Interface Execution : Manually run the Data Migration interface to process configured extracts and transfer data.

Extract Configuration : Define source and target systems, select tables, and map fields to ensure accurate data alignment.

Preview Tools : View source and target data independently or side-by-side to verify mappings and data integrity.

Post-Processing Scripts : Configure custom scripts to run after migration completes, enabling automated cleanup or transformation.

Manual Migration : Quickly migrate data using simplified tools for file uploads and table selection.

Configuration Management : Access and manage common settings and extract definitions to support repeatable migration workflows.

This interface provides a flexible and controlled environment for managing data migrations, enabling users to maintain consistency, reduce errors, and streamline data transfer operations.

Contents

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For more information, please visit: https://wercs.helpdocsonline.com/dte-data-migration-2

Dte Data Migration

Running the data migration interface manually

Use the Data Migration selection on the DTE menu to manually execute a data migration. This process creates a batch to transfer data based on predefined configuration settings.

Accessing the Interface

From the DTE menu, select Data Migration .

Executing the Migration

Follow these steps to run the interface and create a data migration job:

Select the Data Migration checkbox.

Click Process Interface to initiate the migration.

This form contains the following options:

Manage Configuration Settings – Dropdown menu containing Manage Common Settings, Extract Settings, Migration, and Customer File Migration options. See Manage Data Migration Configuration Settings for more details.

Process Migration – Dropdown menu containing a Manual Migration Processing option. Select this option from anywhere in the Data Migration tool to return to the Process Interface form.

Data Migration – Select the Data Migration checkbox, then click the Process Interface button to create a data migration job. When the following message appears confirming that a batch was created, click OK :

For more information, please visit: https://wercs.helpdocsonline.com/dte-data-migration

Dte Migration Configuration

Managing data migration configuration settings

Use the Manage Common Settings form to view configuration settings specific to the Data Migration Interface. These settings control how data is processed and transferred during migration.

For more information, please visit: https://wercs.helpdocsonline.com/dte-migration-configuration

Data Migration 2

Configuring extract settings for data migration

Use the Extract Settings form to define how data is migrated from a source to a target. Approved users can create multiple extracts to support different migration scenarios.

Accessing extract settings

Creating a new extract

Using the Extract Settings form, follow these steps to create a new extract:

From the Extract Settings dropdown, select Active .

In the Extract section, select -new- . This option is only available for Active extracts.

Enter an extract name in the Extract Name field. The Extract ID auto populates.

Select a Source (database or location). For file sources, select the desired File Settings and a Source Connection String . For database sources, select only a Source Connection String .

For file sources, select the desired File Settings and a Source Connection String .

For database sources, select only a Source Connection String .

Select the Active checkbox. This must be done before saving.

Select a Target (database or location) for the migrated data.

For file sources, select the desired File Settings and a Source Connection String .

For database sources, select only a Source Connection String .

Click the Next button to move to the Source Settings form.

Defining source settings

Use the Source Setting form to define source settings used in data migration.

From the Source Table dropdown, select -newTable- .

Click the Next button to move to the Target Settings form.

Defining target settings

Follow these steps to configure target settings:

From the Target Table dropdown menu, select -newTable- .

Click Select Target Tables button to open the Target Table pop-up form. Select a desired table from the pop-up form, then click Select .

The table fields are now populated in the Fields section. To delete an unwanted field, select the field, then click Delete.

The Target Table section is populated with details relevant to each field in the table. These options should not be adjusted without contacting a Customer Service Representative.

Click Next to continue.

For more information, please visit: https://wercs.helpdocsonline.com/data-migration-2

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Map Source and Target Tables for Data Migration

The Map Settings form appears next, enabling users to map fields between source and target tables. This mapping ensures that data is transferred accurately during migration.

Mapping Tables for Data Migration

Click the Map Table button to map the Source and Target tables to one another. Use the Map Table popup form to see all of the Source and Target tables added to the selected extract.

Each Source table must be aligned with its intended Target table for the data to migrate.

Adjust the order of these tables by selecting a table, then clicking the appropriate directional arrow buttons.

Click Save button to save mappings.

Select a field and use the directional buttons to align Source and Target fields. This mapping ensures that Source data are correctly mapped to Target.

Source Preview – Click to view mapped Source data.

Target Preview – Click to view the Target table.

OverAll Preview – Click to display Source data and data in the Target table.

Process – Click Process button to only process the selected table or click the Process All button to process all tables.

Define Post Process – Click to open the Process Webpage popup form. The form contains all custom scripts that have been configured to process after the data migration has completed processing.

For more information, please visit: https://wercs.helpdocsonline.com/mjcnpavbmzqkdndboslb

Dte Manual Migration

Manually migrating data using the Migration form

Performing a Migration

From the Source File Types section, select a Source file type.

From the Define Target Table section, select a Target table.

To view the selected I-Table columns requirements, click the View Column Order . The Target Column popup form displays the I-Table’s required columns in order.

Click Select Source File to create a record with the file's name and the date timestamp. Use the Upload new File popup to select a file and import it.

Click Source Preview to view the Source data that is mapped.

Click Target Preview to view the Target table.

Process buttons – Click Process button to only process the selected table or click the Process All button to process all tables.

Migrating customer data

Customer migration supports customer data migration. From the Manage Configuration Settings menu, select Customer Migration from the dropdown menu .

Performing a customer migration

Select a Source file type from the Source File Types section.

Select a Target table from the Define Target Table section.

Click the Select Source File button to create a record with the file's name and the date timestamp. Use the Upload new File popup to select a file and import it.

Process buttons – Click Process to process the CSV file to the temp table, or click the Process All to process all uploaded CSV files to the temp table.

Mapping Validation – Click this button to validate column mappings in the file to be processed. The following fields are checked when this button is selected (other fields may be included):

Products.csv

Column E - Language

Components.csv

Column E - Language

Formulations.csv

Column H – WeightPercent

Column K – ProductQuantity

Column M – ComponentQuantity

Column O – TradeSecretFlag

Column P — HazardFlag

Documents.csv

Column C - Region

Column E - Language

Column G/H/K/L - Date fields

Column F - Authorization

Column I - RevisionNumber

Column M - DocumentType

Column N - DocumentIdentity

Attributes_Products_Region_Specific.csv

Column C - Region

Temp Table Preview – Click this button to preview temp tables created when CSV files are uploaded in the Customer File Migration form.

Temp Table Preview – Click this button to preview temp tables created when CSV files are uploaded in the Customer File Migration form.

C_DM_ATTRIBUTES_COMPONENTS_GLOBAL

C_DM_ATTRIBUTES_PRODUCTS_GLOBAL

C_DM_ATTRIBUTES_PRODUCTS_REGION_SPECIFIC

C_DM_COMPONENTS

C_DM_DOCUMENTS

C_DM_FORMULATIONS

C_DM_PRODUCTS

Process to ITable – Click to process data from the temp tables to their respective I_Tables (I_PRODUCTS, I_ALIASES, I_COMPONENTS, etc.).

I_Table Preview – Click to view records in I_Tables. Products.csv potentially results in records for I_PRODUCTS and I_ALIASES, but the system can only preview/display one I_Table in its frame.

Delete Records in I_Tables – Click to delete records processed to I_Tables only where F_USER_UPDATED='DM_TOOL'.

View Log – Click this button to open the Log file (text file) which has details about the current Customer File Migration.

For more information, please visit: https://wercs.helpdocsonline.com/dte-manual-migration

Dte Inventory

Inventory overview

The Inventory interface in the DTE Web system enables users to import inventory and location data into the database. This data is critical for downstream modules such as SARA, which rely on accurate inventory records for compliance and reporting.

The interface supports manual execution of inventory imports using defined parameters, and includes tools for analyzing related ITables and managing configuration settings. Users can initiate processing routines, inspect table structures, and adjust system behavior through common settings—ensuring that inventory data is correctly staged and validated.

Key functional areas

Key functionality includes:

Interface Execution : Manually run the Inventory interface using operator and date parameters to import inventory data.

Data Analysis : Access and analyze ITables related to inventory to verify data accuracy and troubleshoot issues.

Configuration Management : View and manage Inventory-specific common settings to control interface behavior.

This interface provides a reliable and configurable environment for managing inventory data, enabling users to maintain data integrity and support regulatory compliance.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/dte-inventory

Dte Inventory Access

Accessing and running the Inventory interface

Use the Inventory interface to import inventory and location data into the database. This data is used by the SARA module for compliance and reporting.

Accessing the interface

To begin processing inventory data:

Select the Inventory checkbox. The INV Arguments options appear.

Select an Operator and enter a LastRuneDate .

Click Process Interface to execute the interface.

For more information, please visit: https://wercs.helpdocsonline.com/dte-inventory-access

Dte Inventroy Itable

Analyzing ITable Data for inventory

Use the Analyze ITable Data form to inspect tables related to the Inventory Interface. This form provides visibility into the underlying data structures used during inventory processing.

Accessing Analyze ITable Data

For detailed information about how to run the Analyze ITable Data form, see View and Export ITable Data in DTE .

For more information, please visit: https://wercs.helpdocsonline.com/dte-inventroy-itable

Dte Inventory Configure Common

Configuring common inventory settings

Use the Manage Common Settings form to view configuration settings specific to the Inventory interface. These settings govern how inventory data is processed and imported into the database. Changes to these settings should only be made in coordination with a Customer Service Representative.

Accessing the form

To view Inventory-specific settings:

For more information, please visit: https://wercs.helpdocsonline.com/dte-inventory-configure-common

Labels

Labels Overview

The Labels interface in the DTE Web system enables users to manage the creation, printing, and configuration of shipment and product labels. This interface supports both automated and manual workflows, allowing users to queue label jobs, configure printer mappings, and generate labels on demand when ERP data is unavailable.

Labels are processed through a structured interface that includes queue management, history tracking, manual entry, and validation routines. Users can preview and print labels, adjust printing parameters, and manage label templates and printer associations—all while maintaining control over timing and output.

Key Functional Areas

Key functionality includes:

Label Queue Management : View and release label jobs for printing, preview PDFs, and adjust print settings.

Configuration Tools : Manage common settings, required fields, and pre-validation rules to ensure label data integrity.

Printer Administration : Map templates to printers and plants, add new printer configurations, and manage template associations.

Manual Label Entry : Generate label jobs manually when automated ERP requests are unavailable or impractical.

Label History and Reprints : Access previously printed labels and errored jobs for reprinting or review.

Interface Execution : Manually run the DTE Label Interface to process queued label jobs.

Data Analysis : Analyze ITables related to label processing to verify data accuracy and troubleshoot issues.

Migration Tools : Migrate label data manually when needed.

This interface provides a flexible and controlled environment for managing label operations, enabling users to maintain compliance, ensure print accuracy, and adapt to dynamic operational needs.

Contents

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For more information, please visit: https://wercs.helpdocsonline.com/labels

Dte Labels Using Label Queue

Accessing and Using the Labels Queue

The Labels Queue enables you to manage label records that are pending release for printing. This form provides control over when and how labels are printed, ensuring accurate data output and timing.

Module Access

Main Form

Print or Modify Records

To print or modify a record in the queue:

Select the checkbox for your desired record.

Click Print .

To preview the label before printing:

Click Preview PDF .

Label History

The Label History form displays your label history and errored labels. It is similar to the Jobs form in functionality but is used primarily for reprinting and viewing previously printed label jobs.

From the Label UI menu, Select Label History .

To print a record, Select your desired record’s checkbox, then Click the Print button. If you select multiple records, they are sent to the printer immediately.

From this dialog you can adjust your printing options. Some fields may be greyed out based on your specific needs.

You can preview your PDF before it prints by Clicking the Preview PDF button.

After you select your desired options, Click the Print button.

Label Entry

From the Label UI menu, Select Label Entry .

The Entry form is made from the following elements:

Product – Selects the product for the selected job.

Qty to Print – Defines the number of labels to print.

Quantity Remaining – Defines the number of labels available to print for the print job.

Copies – Defines the number of sets of labels to print. (This acts as a multiplier).

Priority – A value used to establish a hierarchy of job importance. Lower value priorities are processed first.

Language – The single language or list of dynamic languages in which the label is printed. (If you enter a list of language codes, they must be space separated).

Plant – The available plant values in I_LABEL_PRINTERS.

Template – The label templates available to the selected plant for I_LABEL_PRINTERS.

Printer – Printers available to the Plant/Template combination selected.

Email – The email address that receives a PDF version of the label as an attachment. (This field is not required).

Send Email with PDF – Only email a PDF of the label to the address in the Email field. The label is not sent to the printer.

Process Label Manually

Process Label Manually allows you to manually run the DTE Label Interface.

From the Process Label menu, Select Process Label Manually .

Select the Label Interface checkbox.

The LI Arguments options appear:

These options should not be manually changed without contacting your Customer Service Representative.

Click the Process Interface button.

Analyze ITable Data

Analyze ITable Data allows you to view tables that pertain to the Labels Interface.

From the Process Label menu, Select Process Label Manually .

The following form appears:

Additional information about this form can be found in section 9.0 ANALYZE ITABLE DATA .

For more information, please visit: https://wercs.helpdocsonline.com/dte-labels-using-label-queue

Dte Manage Common Label Settings

Managing Common Settings for Labels

The Common Settings form enables you to view and manage label-specific configuration options. These settings are typically maintained by your Customer Service Representative and should not be modified without guidance.

Accessing Manage Common Settings

Common Settings Form

For more information, please visit: https://wercs.helpdocsonline.com/dte-manage-common-label-settings

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Configuring Pre-Validation Settings

Pre Validation Settings enable error handling during product import by enforcing validation checks. These settings are configured during installation and should not be modified without guidance from your Customer Service Representative.

Accessing Pre-Validation Settings

Pre-Validations Settings Form

■■ Do not modify these settings unless instructed by your Customer Service Representative.

■■ Do not modify these settings unless instructed by your Customer Service Representative.

For more information, please visit: https://wercs.helpdocsonline.com/keutfmwpdqpyrccicwwr

Labels Required Field Settings

Defining Required Field Settings

Use the Required Field Settings form to define which fields must be populated for a selected ITable. This configuration enables pre-validation to fail any job that does not contain data in the required fields.

Accessing Required Field Settings

Required Field Settings Form

Define Required Fields

Follow these steps to configure the required fields:

Select an available field from the list.

To remove a required field, select it from the Required Fields section.

Click the ← button to remove the selected field.

For more information, please visit: https://wercs.helpdocsonline.com/labels-required-field-settings

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Migrating Label Data

Use the Label Migration form to manually migrate label data. This functionality is useful for transferring label configurations or records between environments or systems.

Accessing Label Migration

Label Migration Form

See Manually Migrate Data Using the Migration Form for additional information about this form.

For more information, please visit: https://wercs.helpdocsonline.com/gyehcy7aoecrvj1d1w71

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Managing Template and Printer Mappings

Use the Admin Printers form to manage template and printer mappings stored in the I_LABEL_PRINTERS table. Each label requires a valid mapping between a template, plant, and printer to print successfully. From this form, new template/printer mappings can be added, edited, and/or deleted.

Accessing Printer Settings

Printer Settings Form

Add a New Printer

Follow these steps to add a new printer:

The Add Printer window appears. Enter the required information.

To store the new printer, click Save .

Manage Template/Printer Mappings

From the Printer Settings form, you can add or remove a mapping for all finalized templates to a printer that has been added to the list of available printers.

To manage mappings between templates and printers, click the Printer button.

Add Templates to a Printer

Select a template from the Non-Associative Template section.

Click → to add the selected template.

Remove Templates from a Printer

Select a template from the Associative Template section.

Click ← to remove the selected template.

Map Printers to a Template

From the Printer Settings form, you can also map all available printers to a selected template using the Manage Template Webpage Dialog .

To manage mappings between templates and printers, click the Template button.

Add Printers to a Template

Select a template from the Non-Associative Template section.

Click → to add the selected template.

Remove Printers from a Template

Select a template from the Associative Template section.

Click ← to remove the selected template.

For more information, please visit: https://wercs.helpdocsonline.com/an2lr4y9rh0t7fvs8nnd

Dte Labels View Reprint

Viewing, Reprinting Label Jobs

Use the Label History form to view and reprint previously printed label jobs. This form is similar to the Jobs form but is designed specifically for reviewing label history and handling errored labels.

Accessing Label History

Label History Form

Reprint Label Jobs

Follow these steps to reprint label jobs:

Select the checkbox for the desired record.

Adjust Print Options

When the Edit Dialogs Webpage Dialog opens:

Review and adjust available printing options. Some fields may be disabled depending on your configuration.

To preview the label, click Preview PDF .

For more information, please visit: https://wercs.helpdocsonline.com/dte-labels-view-reprint

Dte Label Entry

Manually Generate Label Jobs

Use the Label Entry form to manually generate label jobs. This is especially useful when ERP systems cannot send label requests automatically or when ADMIN users need to quickly create labels without ERP data.

Accessing Label Entry

Label Entry Form

Define Label Job Parameters

The form includes the following fields:

Product – Selects the product for the label job.

Qty to Print – Defines the number of labels to print.

Quantity Remaining – Indicates how many labels are still available to print for the job.

Copies – Specifies the number of sets of labels to print (acts as a multiplier).

Priority – Determines job importance; lower values are processed first.

Language – Specifies the language(s) for the label. Enter a space-separated list of language codes for multiple languages.

Plant – Selects the plant from available values in I_LABEL_PRINTERS .

Template – Chooses the label template available to the selected plant.

Printer – Selects the printer available for the chosen Plant/Template combination.

Email – (Optional) Email address to receive a PDF version of the label.

Send Email with PDF – Sends only the PDF to the email address without printing the label.

For more information, please visit: https://wercs.helpdocsonline.com/dte-label-entry

Dte Process Label Manually

Manually Run the DTE Label Interface

Use the Process Label Manually form to manually run the DTE Label Interface.

Accessing Process Label Manually

Process Label Manually Form

The Process Interface form appears, enabling manual execution of the label interface.

Follow these steps to manually process labels:

Select the Label Interface checkbox.

The LI Arguments options appear. These options should not be modified without guidance from your Customer Service Representative.

For more information, please visit: https://wercs.helpdocsonline.com/dte-process-label-manually

Dte Orders

Orders Overview

The Orders interface in the DTE Web system enables users to manually process, configure, and review customer order data using a structured pre and post processor workflow. This interface supports both operational and administrative tasks, allowing users to manage order records, validate data, configure output formats, and analyze historical activity.

The Orders module is divided into two primary functional areas:

Order Pre Processor : This area focuses on preparing order data for processing. Users can create sample orders, reset statuses, run pre-validation routines, and migrate order data manually. Configuration settings specific to the pre-processing workflow—including common settings, custom logic, and migration tools—are also accessible here.

Order Pre Processor : This area focuses on preparing order data for processing. Users can create sample orders, reset statuses, run pre-validation routines, and migrate order data manually. Configuration settings specific to the pre-processing workflow—including common settings, custom logic, and migration tools—are also accessible here.

Order Post Processor : This area handles the final stages of order processing, including document distribution, formatting, and dispatch. Users can configure settings for file naming, enclosures, TSCA compliance, and communication methods (print, email, fax). Post-processing also includes tools for viewing customer order history and dispatch job records.

Order Post Processor : This area handles the final stages of order processing, including document distribution, formatting, and dispatch. Users can configure settings for file naming, enclosures, TSCA compliance, and communication methods (print, email, fax). Post-processing also includes tools for viewing customer order history and dispatch job records.

Together, these tools provide a comprehensive framework for managing customer orders, enabling users to maintain data integrity, ensure compliance with business rules, and tailor output formats to meet customer and regulatory requirements.

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For more information, please visit: https://wercs.helpdocsonline.com/dte-orders

Dte Orders Pre Processor

Order Pre Processor

Use the Order Pre Processor to manually initiate pre-processing tasks for the Orders interface.

Accessing Order Pre Processor

Process Interface Form

Processing Orders

Select your desired option.

For more information, please visit: https://wercs.helpdocsonline.com/dte-orders-pre-processor

Dte Orders Preprocessor Settings

Configure Pre-Processor Settings

Use the Pre Processor configuration options to manage order-specific settings and data including:

Common and custom settings.

Migrating orders and create, view, and reset orders.

Analyzing ITable data.

Manage Common Settings

View Pre Processor-specific common settings. Contact your Customer Service Representative before making any changes.

Manage Custom Settings

These settings are specific to the Pre-Processor Interface. Do not adjust them without contacting your Customer Service Representative.

Orders Migration

Use Orders Migration to manually migrate label data.

Create/View/Reset Orders

You can create sample orders and filter data in the I_ORDERS table.

The Show Orders form appears.

Filter data by status using the Status dropdown.

To reset a processed or errored record, select the record and click Reset .

To create a sample order, click Create an Order .

Analyze ITable Data

View tables related to the Orders Interface.

For more information, please visit: https://wercs.helpdocsonline.com/dte-orders-preprocessor-settings

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Order Post Processor

Use the Order Post Processor to manually initiate post-processing tasks for the Orders interface.

Accessing Order Post Processor

Process Interface Form

Processing Orders

Select your desired option.

Click Process Interface to begin processing.

You can return to the Order Post Processor main form at any time by selecting Manually Process Orders from the Process Orders menu.

For more information, please visit: https://wercs.helpdocsonline.com/eo7hq9kixiprqy9m4np9

Post Processor Settings

Configure Post Processor Settings

Use the Post Processor configuration options to manage document distribution, formatting, and customer-specific settings. Contact your Customer Service Representative before making any adjustments to these settings.

Manage Common Settings

View Post Processor-specific common settings.

General Settings

View general settings related to Orders Interface Processing.

Document Settings

View and edit settings for document distribution.

TSCA Settings

View and edit settings for TSCA products and cover letters.

Print, Email, Fax Settings

View and edit print, email, and fax settings.

File Format Settings

Edit naming conventions for SDSs, Cover Letters, and Merged File Format.

Enclosure Format Settings

View and edit the mapping table for cover letters.

Custom Settings

These settings are specific to the Post Processor Interface. Do not adjust them without contacting your Customer Service Representative.

For more information, please visit: https://wercs.helpdocsonline.com/post-processor-settings

Dte Orders Review Manage

Review and Manage Customer Orders

Use these tools to view, filter, and reset customer order records and dispatch jobs.

Show Customer Orders

Display orders from I_ORDERS .

Dispatch Job

View records processed by the dispatch interface.

Customer Order History

View historical records for customer-ordered documents.

For more information, please visit: https://wercs.helpdocsonline.com/dte-orders-review-manage

Product Import

Product Import overview

The Product Import interface in the DTE Web system enables users to manage the full lifecycle of importing product data into the I_PROCESS and associated ITables. This interface supports job creation, validation, configuration, and execution—ensuring that product data is accurately staged and processed according to system rules and business requirements.

Product Import is divided into three core functional areas:

Interface Processing - Users can create and manage import jobs, assign Job IDs, configure process groups and priorities, reset statuses, and run pre-validation checks. Manual job processing and analysis tools are also available to support troubleshooting and data verification.

Interface Processing - Users can create and manage import jobs, assign Job IDs, configure process groups and priorities, reset statuses, and run pre-validation checks. Manual job processing and analysis tools are also available to support troubleshooting and data verification.

Configuration Settings - A suite of configuration forms enables users to manage common settings, validation rules, required fields, process groups, and lookup settings. These settings govern how product data is validated and processed, and should only be modified in coordination with a Customer Service Representative.

Configuration Settings - A suite of configuration forms enables users to manage common settings, validation rules, required fields, process groups, and lookup settings. These settings govern how product data is validated and processed, and should only be modified in coordination with a Customer Service Representative.

Migration Tools - The Import Migration form provides a manual method for migrating product data, enabling users to bypass automated routines when necessary.

Migration Tools - The Import Migration form provides a manual method for migrating product data, enabling users to bypass automated routines when necessary.

Together, these tools provide a robust framework for managing product data imports, enabling users to maintain data integrity, resolve errors, and ensure compliance with validation requirements.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/product-import

Dte Product Import Jobs Analyze

Managing product import jobs and analyze data

Use the Product Import Interface to create and manage import jobs, assign process groups and priorities, run validation checks, and analyze related ITable data.

Accessing the Product Import interface

Manage Interface Processing form

Filtering jobs by status

Use the Status dropdown to filter records based on their current processing state.

Initial — View jobs ready to be processed (Status = 0).

In Process — View jobs currently being processed (Status = 1).

Processed — View jobs that were successfully completed (Status = 2).

Managing import jobs

Use the Import Options section to create jobs, assign Job IDs, update process groups, assign job priorities, reset job statuses, and run pre validation checks.

Reseting job status

Generating IProcess records

Use the Generate IProcess to generate an IProcess record and Job ID if you sent data to an ITable, but you did not send an IProcess record.

To create records in I_PROCESS and assign Job IDs to orphaned ITable records, click Submit .

A record for each product is created in I_PROCESS, and all associated product records in the ITables without a Job ID are assigned that Job ID.

Additionally, each ITable containing “orphan” records (records that are not associated with a Product ID) are assigned a job ID.

Generating Job IDs

Use the Generate Job ID process to generate a Job ID for a record in I_PROCESS that does not already have a Job ID.

If existing jobs with an Initial status are found, the Generate IProcess for Select Group dialog opens, asking if you want to delete the existing data.

Run Pre-Validation checks

Run PreVal Check identifies any record associated with your selected Job ID that fails the product import validation check. This enables you to manually run the pre-validation routine check and create an .xlsx file containing all Job IDs that failed.

Click OK . An .xlsx file is generated listing failed Job IDs.

Assigning Process Group ID

Assign a process group to jobs in I_PROCESS.

The Assign Process GroupID Webpage Dialog opens. Choose to apply to All records or Selected records .

Assigning job priority

You can assign a priority to All of your jobs, or your Selected jobs. A Priority is an Integer assigned to a job that determines its processing urgency. The lower the assigned value, the higher the priority.

The Assign Priority Webpage Dialog opens. Choose to apply to All records or Selected records .

Using right-click options

All actions are available via right-click, with the addition of Process Import Job .

Right-click a record.

Returning to the Product Import Main form

To return to the Product Import main form at any time, from the Process Import menu, select Manage Interface Processing.

For more information, please visit: https://wercs.helpdocsonline.com/dte-product-import-jobs-analyze

Dte Product Import Migrate

Manually migrating product import data

Use the Import Migration form to manually migrate product import data. This tool enables you to initiate migration routines for records that require manual handling.

Accessing the Interface

Process Interface Main Form

Migrating product import data

To migrate product import data:

Select the Product Import checkbox.

The PIJ Arguments options appears, From the Operator dropdown, select: All Job IDs Exact Job ID. If you select this option, enter the Job ID.

All Job IDs

Exact Job ID. If you select this option, enter the Job ID.

Analyzing ITable Data

Analyze ITable Data enables you to view tables that pertain to the Product Import Interface. .

For more information, please visit: https://wercs.helpdocsonline.com/dte-product-import-migrate

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Configuring product import settings

Use the configuration settings to define validation rules, required fields, and lookup behavior for Product Import. These settings help ensure data integrity and control how jobs are processed. Contact your Customer Service Representative before making changes to any of these settings.

Managing common settings

View general settings specific to Product Import.

Accessing the Interface

Additional information about all PIJ settings can be found in the PIJ Web UI Configuration Spec Sheet . Contact your Customer Service Representative for additional information.

Configuring pre-validation settings

Pre Validation Settings displays the product import pre-validations used for error handling. These settings should not be changed without first contacting your Customer Service Representative. The standard installation of the DTE Product Import Interface creates and configures the pre-validation checks, so no modifications are required.

Accessing the Interface

Updating pre-validation settings

Modifying pre-validation settings:

Review the list of pre-validation checks.

Specifying required field settings

Required Field Settings enables you to select the fields that are required to have data populated for a selected ITable. Pre-validation fails any job whose required fields are not populated with data based on the required fields for the selected ITable.

Managing lookup settings

This form displays all available processes for Product Import. Any rule groups or custom processes must be added to the database lookup settings. Contact your Customer Service Representative before creating or modifying any settings.

Accessing the Interface

Modifying PIJ Validation Settings

Pre Import Validation Settings contains additional product import configuration settings that can be modified from their default status. Contact your Customer Service Representative before making any changes to these settings.

Accessing the Interface

For more information, please visit: https://wercs.helpdocsonline.com/atuww11jlnagnxtdd4ej

Manual Job Processing

Managing process groups and processes for Product Import

Use the configuration settings to create and maintain process groups and processes used in Product Import. These settings enable you to organize and control how jobs are grouped and executed.

Managing process groups

Use Manage Process Groups to create and modify process groups

Accessing the Interface

Creating a new process group

If valid, enter the Group Name, Description, and Order, then select a Process Group status from the Status dropdown: Active – Job can be assigned to a job in IProcess. Inactive – Job cannot be assigned to a job in IProcess.

Active – Job can be assigned to a job in IProcess.

Inactive – Job cannot be assigned to a job in IProcess.

Click Save .

Assigning processes to a group

Select a group.

To remove or reorder a process:

Select a process from the Assigned Processes section, then click the left arrow button.

You can add all available processes by clicking the double-arrow left button.

To move the process up in the list of processes, click the up arrow button.

To move the process down in the list of processes, click the down arrow button.

Managing Processes

All available processes are maintained in Manage Processes . Additional available processes can be added to the Product Import Interface to run additional rule groups. Contact your Customer Service Representative before creating or modifying any processes .

Accessing the Interface

Creating a new process

Enter the following details: Group ID — To check for existing Process Group IDs, enter a Group ID, then click Check. Group Name Description Order Status Required Fields

Group ID — To check for existing Process Group IDs, enter a Group ID, then click Check.

Group Name

Description

Order

Status

Required Fields

For more information, please visit: https://wercs.helpdocsonline.com/manual-job-processing

Product Export

Product Export overview

The Product Export interface in the DTE Web system enables users to configure, manage, and execute the export of product data from internal systems to external destinations. This interface supports both automated and manual workflows, offering tools to define export parameters, assign process groups, and initiate export jobs based on specific product criteria and document publication dates.

Product Export is structured to provide flexibility and control over how product data is packaged and transmitted. It includes configuration settings that govern export behavior, validation rules, and custom logic—ensuring that exported data meets regulatory and business requirements.

Key functional areas

Key functionality includes:

Interface Processing - Users can manage export jobs, assign process groups, reset statuses, and manually initiate exports for specific products or date ranges.

Configuration Management - A suite of forms enables users to manage common settings, process groups, processes, custom settings, and lookup configurations. These settings define how export logic is applied and should only be modified in coordination with a Customer Service Representative.

Migration Tools - The Export Migration form provides a manual method for migrating product data, enabling users to bypass automated routines when necessary.

Data Analysis - Users can analyze ITables related to product export to verify data accuracy and troubleshoot issues.

Together, these tools provide a comprehensive framework for managing product data exports, enabling users to maintain compliance, ensure data integrity, and tailor export operations to meet specific business needs.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/product-export

Dte Product Export Manage Interface

Managing the Product Export interface

Use the Product Export Interface to configure and execute export jobs, assign process groups, and manage export-related settings.

Accessing the interface

Manage Interface Processing form

Assigning process group ID

Assign a product export process group to selected jobs.

In the Assign Process GroupID Webpage Dialog , choose to assign a group to All jobs or Selected jobs .

In the Assign Process GroupID Webpage Dialog , choose to assign a group to All jobs or Selected jobs .

Select a Group ID from the dropdown of available export process groups.

Select a Group ID from the dropdown of available export process groups.

Returning to the Product Export Main form

For more information, please visit: https://wercs.helpdocsonline.com/dte-product-export-manage-interface

Dte Product Export Migrate

Manually migrating product export data

Use the Export Migration form to manually migrate export data for a designated date and product.

Manually initiating job processing

Manually initiate the export interface

Select the Product Export checkbox. The PE Arguments options appear.

Select the Product Export checkbox. The PE Arguments options appear.

Choose a published SDS document date range and optionally modify the timestamp for a more exact search parameter.

Choose a published SDS document date range and optionally modify the timestamp for a more exact search parameter.

Select the operator: All products Exact product ID — If selected, enter the ID in the Product field.

Select the operator:

All products

Exact product ID — If selected, enter the ID in the Product field.

Analyzing ITable data

Analyze ITable Data enables you to view tables that pertain to the Product Export Interface. .

For more information, please visit: https://wercs.helpdocsonline.com/dte-product-export-migrate

Dte Product Export Settings

Configuring product export settings

View and configure common, custom, and lookup settings specific to the Product Export Interface. Do not adjust these settings without consulting your Customer Service Representative.

Managing common settings

View Product Export-specific common settings.

Managing custom settings

These settings are specific to the Product Export Interface and should not be adjusted without first contacting your Customer Service Representative.

Configuring export lookup settings

Export Lookup Settings stores all custom export configurations. Contact your Customer Service Representative before making any changes to these settings.

Manually migrating export data

The following form appears. For more details, see Data Migration .

For more information, please visit: https://wercs.helpdocsonline.com/dte-product-export-settings

Dte Product Export Process Groups

Managing process groups and processes for Product Export

Use the configuration settings to create and maintain process groups and processes used in Product Export. These settings enable you to organize and control how jobs are grouped and executed. For detailed information about the following processes, see Manage Process Groups and Processes for Product Import .

Managing process groups

Managing processes

All available processes are maintained in Manage Processes . Additional processes can be added to the Product Export Interface to run additional rule groups. Contact your Customer Service Representative before making any adjustments to these processes.

The Processes form appears.

Assigning processes to a group

Select a group.

To remove or reorder a process:

Select a process from the Assigned Processes section, then click the left arrow button.

You can add all available processes by clicking the double-arrow left button.

To move the process up in the list of processes, click the up arrow button.

To move the process down in the list of processes, click the down arrow button.

For more information, please visit: https://wercs.helpdocsonline.com/dte-product-export-process-groups

Product Xml Import

Product XML Import overview

The Product XML Import interface in the DTE Web system enables users to import product-related data from an XML file into the database. This interface supports structured data ingestion for integration workflows, bulk product updates, or onboarding processes.

Users initiate the import by selecting the Product Import checkbox, which opens the PIJ Arguments section. From there, users specify an Operator and Job ID , then click Process Interface to begin the import. The system processes the XML file and inserts product records into the appropriate database tables.

Configuration settings specific to the Product XML Import process can be reviewed using the Manage Common Settings form. These settings are interface-specific and should only be modified under the guidance of a Customer Service Representative.

Key functional areas

Key functionality includes:

Process Product XML Import Interface – Imports product records from an XML file using operator and job ID parameters.

Manage Common Settings – Displays configuration values specific to the Product XML Import interface.

This section is typically used during system integration, onboarding, or bulk data updates involving product records.

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Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/product-xml-import

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For more information, please visit: https://wercs.helpdocsonline.com/ciygytkbfgfqprj8nb2i

Det Product Import Settings

Configuring common Product XML Import settings

Use the Common Settings form to view configuration options specific to Product XML Import. Contact your Customer Service Representative before making any adjustments to these settings.

Accessing the interface

For more information, please visit: https://wercs.helpdocsonline.com/det-product-import-settings

Product Xml Export

Product XML Export overview

The Product XML Export interface in the DTE Web system enables users to export product-related data into an XML file for use in external systems or archival processes. This interface supports structured data transfer by packaging product records into a standardized format.

Users initiate the export by selecting the Product XML Export checkbox and clicking Process Interface , which generates the XML output. Configuration settings specific to this export process can be reviewed using the Manage Common Settings form. These settings should only be modified under the guidance of a Customer Service Representative.

Key functional areas

Key functionality includes:

Process Product XML Export Interface – Initiates the export of product data to XML format.

Manage Common Settings – Displays configuration values specific to the Product XML Export interface.

This section is typically used during scheduled data transfers or integration workflows that require product data in XML format.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/product-xml-export

Dte System Product Xml Export

Processing product XML export jobs

Use the Product XML Export Interface to export product-related data to an XML file.

Accessing the interface

Process Interface form

Follow these steps to execute the export:

Select the Product Xml Export checkbox.

Click Process Interface .

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-product-xml-export

Dte Product Export Settings 2

Configure common Product XML Export settings

Use the Common Settings form to view configuration options specific to Product XML Export. Contact your Customer Service Representative before making any adjustments to these settings.

Accessing the interface

Common Settings form

For more information, please visit: https://wercs.helpdocsonline.com/dte-product-export-settings-2

Substance Volume Tracking

Substance Volume Tracking Overview

The Substance Volume Tracking (SVT) interface in the DTE Web system enables users to transfer transactional data related to purchases, manufacturing, and sales orders from predefined ITables into the database. This interface supports both automated and manual workflows, allowing users to process SVT jobs, analyze related data, and configure system behavior through a set of specialized settings.

SVT is designed to ensure accurate tracking of substance volumes across business transactions, supporting compliance and reporting requirements. Users can initiate processing routines, reset errored jobs, and manage configuration settings that govern how data is interpreted and transferred.

Key Functional Areas

Key functionality includes:

Interface Execution : Manually run the SVT interface using defined parameters such as operator and last run date.

Job Management : View and reset errored SVT jobs to ensure successful data transfer.

Data Analysis : Access and analyze ITables related to SVT to verify data integrity and troubleshoot issues.

Configuration Management : Manage SVT-specific common settings to control interface behavior.

This interface provides a reliable and configurable environment for tracking substance volumes, enabling users to maintain data accuracy and support regulatory compliance.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/substance-volume-tracking

Dte Svt Interface

Access and Run the Substance Volume Tracking Interface

Use the Substance Volume Tracking interface to transfer transactional data related to purchases, manufacturing, and sales orders from predefined ITables into the database.

Accessing the Interface

To begin processing substance volume data:

From the DTE menu , select Substance Volume Tracking .

The Process Interface form appears.

Select the Substance Volume Tracking checkbox.

The SVT Arguments options appear.

Select an Operator and enter a LastRuneDate .

For more information, please visit: https://wercs.helpdocsonline.com/dte-svt-interface

Dte Svt Itable Analyze

Analyze SVT ITable Data

Use the Analyze ITable Data form to view and verify tables related to the Substance Volume Tracking interface. This tool enables you to inspect the structure and contents of ITables used in SVT processing, helping you troubleshoot issues and confirm data integrity.

Accessing the Form

To analyze SVT-related ITables:

For more information, please visit: https://wercs.helpdocsonline.com/dte-svt-itable-analyze

Dte Svt View Manage Jobs

View and Manage SVT Jobs

Use the Manage Interface Processing form to view and manage SVT jobs. This form enables you to monitor job statuses and reset errored jobs to ensure successful data transfer.

Accessing the Form

To manage SVT jobs:

To view any jobs that have errored, from the Status dropdown menu, select Errored .

Select the checkbox for each job you want to reset.

Click the Reset button. This action reinitializes the selected jobs, enabling them to be reprocessed.

For more information, please visit: https://wercs.helpdocsonline.com/dte-svt-view-manage-jobs

Dte Svt Common Settings

Configure Common SVT Settings

Use the Manage Common Settings form to view configuration settings specific to the Substance Volume Tracking interface. These settings govern how SVT processes are executed and should only be modified in coordination with a Customer Service Representative.

Accessing the Form

To view SVT-specific settings:

For more information, please visit: https://wercs.helpdocsonline.com/dte-svt-common-settings

System

System Overview

The System interface in the DTE Web system provides administrative tools for managing service monitors, verifying interface structures, exporting and importing configuration settings, and running automated interface tests. These utilities support system integrity and interface reliability, enabling users to maintain a stable and well-configured environment.

Several functions in this section—such as interface configuration and transform settings—are sensitive and should only be modified under the guidance of a Customer Service Representative. The remaining tools offer direct access to service-related diagnostics, scheduling, and data verification processes.

Key Functional Areas

Key functionality includes:

Show Service Manager – Displays all installed service monitors for active interfaces.

Verify ITable Structure – Checks the database for required ITables and fields, identifying any missing components.

Import and Export Settings – Enables users to export interface configurations to XML for backup or deployment, with optional import functionality.

Automated Process – Runs automated tests to verify interface functionality and provides tools for monitoring and removing test data.

Manage Service Schedule Configuration – Controls the timing and frequency of interface execution.

Manage Transform Configuration – Contains interface-specific transform settings that should only be adjusted with support.

Manage Interface Configuration – Provides access to interface configuration settings, also requiring support oversight.

These tools are typically used during setup, troubleshooting, or system maintenance and are designed to ensure that interface operations remain consistent and verifiable across environments.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/system

Dte System Access

Access and the Run the System Interface

Use the System module in DTE to access administrative tools for managing service monitors, verifying interface structures, exporting and importing configuration settings, and running automated interface tests.

Accessing the Interface

From the DTE menu, select System .

Application Logging Form

Return to the System Main Form

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-access

Dte System Sql Query

Run the SQL Query Analyzer

Use the SQL Query Analyzer to write and execute SQL queries.

Accessing the Interface

SQL Query Analyzer Main Form

To run the SQL Query Analyzer:

Enter your desired query in the field, highlight it, then click Execute **.**

If you want to clear your SQL query, click Clear **.** This does not clear the data at the bottom of the form.

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-sql-query

Dte System Application Settings

Configure Application Settings

Application Settings enable you to view key defaults or settings that the interface uses. These settings should not be adjusted without consulting your Customer Service Representative.

Accessing the Interface

Application Settings Main Form

To add an interface type option:

Click Add New to open the Add Setting Webpage Dialog .

Enter values into the Parent , Key , and Value fields. Additional fields may be required based on the setting you are adding.

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-application-settings

Dte System Job Queue

View the Job Queue

Use the Job Queue to view your job queue history and batches for all interfaces that are new, processing, or processed. This is useful if a large batch is processing, and you want to quickly verify if it is still processing.

Accessing the Interface

Job Queue Main Form

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-job-queue

Dte System Show Process Monitor

Show Process Monitor

When processing a large batch of data, Show Process Monitor displays a count of how many records have processed successfully, as well as the count of records that errored.

Accessing the Interface

Show Process Monitor Main Form

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-show-process-monitor

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System Verification – Verify ITable Structure

Use the Verify ITable Structure form to confirm that all required tables and fields exist for a selected interface. This tool helps identify missing components that may prevent successful data processing.

Accessing the Interface

Verify ITable Structure Main Form

Verifying Table Structure

Review the status indicators: Green checkmark – Indicates the table and fields are present. Red X – Indicates missing tables or fields.

Green checkmark – Indicates the table and fields are present.

Red X – Indicates missing tables or fields.

Review the Missing Table or Fields Details column for a detailed explanation of any missing components.

For more information, please visit: https://wercs.helpdocsonline.com/nrdqgov2orekqyq0g2y7

Dte Settings Import Export

Import and Export Interface Settings

Use the Import and Export Settings form to back up or restore interface configurations using XML files. This tool is especially useful for preserving system settings or migrating them between environments.

■■ Important: Do not import settings without first contacting your Customer Service Representative.

■■ Important: Do not import settings without first contacting your Customer Service Representative.

Accessing the Interface

Import and Export Settings Form

Exporting Interface Settings

Select an Interface and Type from the dropdown menus.

Review the populated data at the bottom of the form.

Importing Interface Settings

Select an XML file containing interface settings.

Follow any on-screen instructions to complete the import.

Confirm with your Customer Service Representative before proceeding.

For more information, please visit: https://wercs.helpdocsonline.com/dte-settings-import-export

Dte System Run Auto Tests

Run Automated Interface Tests

Use the Automated Process form to run automated tests that verify basic functionality for selected interfaces. These tests simulate data processing and help confirm that interface configurations are working as expected.

Accessing the Interface

Automated Process Form

Running Automated Tests

Select an Interface from the dropdown menu.

Click Create Automated Process to initiate the test.

Monitoring and Cleaning Up Test Data

Use Analyze ITable Data to monitor record processing.

Once all records have processed successfully, click Delete to remove all test data.

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-run-auto-tests

Dte System Service Sched Config

Manage Service Schedule Configuration

Use the Manage Service Schedule Configuration form to define when and how often each interface runs. This tool enables you to align interface execution with operational needs and system availability.

Accessing the Interface

Manage Service Schedule Configuration Form

Editing Service Schedules

Select a Service Schedule Option , then click Edit .

In the Edit Schedule Webpage Dialog , select your desired scheduling options.

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-service-sched-config

Dte System Int Trans Config

Manage Interface and Transform Configuration

Use the Manage Interface Configuration and Manage Transform Configuration forms to view and adjust advanced interface settings. These settings control how data is transformed and processed across interfaces. Changes to these configurations should only be made under guidance from your Customer Service Representative.

Access the Interfaces

Manage Interface or Transform Configuration Form

Configuration Guidance

■■ Important: These forms contain advanced interface settings. Do not make changes without first contacting your Customer Service Representative.

■■ Important: These forms contain advanced interface settings. Do not make changes without first contacting your Customer Service Representative.

For more information, please visit: https://wercs.helpdocsonline.com/dte-system-int-trans-config

Management 2

Management

The Management menu in WERCS Studio provides access to administrative and regulatory tools that support system configuration, compliance tracking, and workflow control. These functions are designed for advanced users managing data governance, security, and regulatory reporting.

Key functional areas

This module includes the following functional areas:

Administrator – Access system-wide administrative settings.

GCS – Manage Global Compliance Settings (accessed from Subformat Import Export).

GTTM – Evaluate product transactions against global trade regulations, helping ensure compliance before shipments occur (accessed from Substance Volume Tracking).

Material Management – Oversee material-related data and configurations.

PCN – Handle Poison Centre Notification-related data.

Rule Writer – Create and maintain system rules for automated processing.

SARA – Manage SARA Title III reporting requirements.

Security Manager – Manage user roles, permissions, and access controls.

Subformat Import Export – Handle import/export of subformat data structures.

Substance Volume Tracking – Monitor and manage chemical volumes for regulatory compliance.

Workflow Manager – Configure and monitor workflow sequences across modules.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/management-2

Administrator

Welcome to Administrator

Administrator is a management tool for establishing essential WERCS Studio operating parameters and initiating and monitoring the batch environment. The user running this module must have the authority to perform and manage the company's administrative functions.

With Administrator, you can:

Set up Plants to publish documents

Create base sets that allow you to publish documents in multiple languages

Archive documents and their data

Key functional areas

Plant Setup – Define publishing locations for document generation.

Base Set Creation – Configure multilingual publishing options using base sets.

Document Archiving – Store documents and associated data for long-term access and compliance.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/administrator

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Accessing the Administrator module

This section gives a brief overview of the Administrator module, including how to access it from WERCS Studio and a summary of the available options.

Adminstrator module access

From the Management menu, select Administrator .

Main form

The Administrator form is broken out into two areas:

Navigational Menu: Navigate to the different areas of the Administrator module.

Main Canvas: Tools available for the currently selected tab.

Application settings

Software customizations

Special rule handling procedures.

For more information, please visit: https://wercs.helpdocsonline.com/v59bq1k77uzwl2nb9fy9

Setting Up Plants

Adding plants

The Plants selection on the Settings menu enables you to manage various locations and their settings, including Formats, Subformats, document types, and revision history.

Adding a plant

To add a plant, from the Settings Navigational Menu, click Plant .

The Plants form opens:

To add a new plant, click the Add New button.

The Plant Defaults – New Webpage Dialog opens:

In the Code field, enter a unique Plant Code identifier of up to 10 characters in length, with accompanying name, address, and contact information.

Use the Defaults section to establish the default settings for the selected plant.

From the Options section, select your desired options:

Change Notification - Track changes that occur while using the Administrator module. Additional information about Change Notifications can be found in Change Notifications .

Use Published Documents for Batch Jobs - Designate which type of document is used for a batch job. If none are selected, it defaults to using a live build of the document.

Authorization Required for View - Require WERCS Studio users to authorize a product before viewing, printing, faxing, emailing, or saving the SDS as a file. Only the Publish operation requires authorization when this option is not selected.

Mask Percent - Prevent percentages from being displayed in any component matrix on an SDS. Masking the percent causes the range to be defaulted, and it cannot be defined.

Prefix – A starting string for all new components.

Start – A starting integer to specify a sequence of new Component IDs.

End – The maximum Component ID currently in use.

MYSDS API Key - Need field description.

Formulation Sort - Define the order that components appear on a document: 0 – Descending Percent (Default) 1 – Ascending Percent 2 – Descending by Component Name 3 – Ascending by Component Name – Screen Order (Formulation form)

0 – Descending Percent (Default)

1 – Ascending Percent

2 – Descending by Component Name

3 – Ascending by Component Name

– Screen Order (Formulation form)

Update revision number via batch job only - Only update the revision number when the orders job runs, not each time the revision date is updated. This prevents the revision number from changing many times before it is published.

Workflow - You must select this option if you utilize Workflows. Additional information about this functionality can be found in the Workflow Manager reference .

Use CAS Verification - Select this check box to authorize what constitutes a valid CAS Identifier for new components, then enter your CAS verification string into the Edit CAS Verification field.

Revision Factor - Specify the revision factor for this plant. Each plant can have a different revision factor. If you select a revision factor of 5, whenever a document is revised, the Revision Number increases by an increment of 5 (for example. 5, 10, 15). You can also use fractional Revision Factors (for example, 10.1, 10.2).

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CA replacement string - Replace internal CAS designations with a separate identification when it is printed on an SDS. You can utilize multiple replacement values by using semicolons to separate the values. If your company allows CAS numbers such as PNM#### to be entered when adding new components, but you want these types of components to show as Pending on the SDS, you want to enter PMN;PENDING into the CAS Replacement String field.

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For more information, please visit: https://wercs.helpdocsonline.com/setting-up-plants

Localization Management

Localization management

Localization Management enables you to manage the countries, languages and Formats that are utilized when designing SDSs.

For more information, please visit: https://wercs.helpdocsonline.com/localization-management

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Archiving products and product components

Archiving products and product data creates a saved version of the data in its current state to ensure there is no loss of data or accidental deletion.

Archiving products

To archive a product, from the Settings Navigational Menu, click Archive , then click Archive products .

Click the Add New button.

The Select Product Webpage Dialog opens. Use the Filtering tool to select your desired product.

In the Filtering form, enter the desired filtering criteria, and then click Apply to view the filtered results in the Products main form.

After you select your product, in the Archive Products main form, click Add to archive button.

Archiving product data

To archive product data, from the Settings Navigational Menu, click Archive , then click Archive Product Data .

The following form opens. Filter and select a product by clicking the following buttons:

After selecting a product, click Add to archive .

Once a product is archived, you can select it to view the date and user that archived the product in the Archive Versions section.

To undo the archiving of data, right-click on the Alias ID in the Archive Versions section and select Restore .

For more information, please visit: https://wercs.helpdocsonline.com/17wh6xyrfst8b2u5ktdk

Countries

Adding countries, associating formats, languages

The Countries selection in the Localization Management menu enables you to manage your country data and preferences.

Adding a new country

To add a new country, from the Settings Navigational Menu, click Localization Management , then click Countries.

The Countries form opens:

To add a new country, click the Add New button.

The Country – New Webpage Dialog opens. Enter a code and description, select the country, and then click Save :

Code - Three-letter code related to the country you are adding.

Description - Full name of the country.

Country - Need description.

Associating formats

To associate a format to a country in the Associated Format section, select a country, then click the Add New button.

The Country Formats – New Webpage Dialog opens. To select a Format and SubFormat to associate with the country, click the button to the right of the respective field.

When the respective Search appears, select the Format or SubFormat.

When the Country Formats – New Webpage Dialog reappears:

To set your selected Subformat as the default Subformat for this country, select the Default SubFormat checkbox.

If multiple Subformats are configured for a country, you set an order of precedence for each Subformat using the Priority field. The system uses this priority to select the appropriate document during order processing. It selects higher-priority formats first.

Click Save .

Associating languages

To associate a language to a country in the Associated Language section, select the country, then click the Add New button.

The Country – Language Dialog opens. To select a language to associate with the country, click the button to the right of the Language field.

When the Search appears, select the language to associate with this country.

When the Country – Language Dialog reappears:

To set your selected language as the default language for this country, select the Default Language checkbox.

If this language needs to be sent with every update of the Format/Subformat, select the Always send? checkbox.

Click Save .

For more information, please visit: https://wercs.helpdocsonline.com/countries

Language Preferences Translation

Configuring language preferences, translation settings

The Languages selection on the Localization Management menu enables you to manage your language data.

Managing language data

From the Settings Navigational Menu, click Localization Management , then click Languages.

The Language form opens:

To add a new language, click the Add New button.

The Language – New Webpage Dialog opens:

Enter your desired language information in the following fields, then click Save :

Code - Two-character code that is assigned to each language in WERCS Studio.

Name - Description of the language.

CharSet - Character Set (CharSet) or Code Page is an ordered set of characters that associates a numeric index (code point) with each character of a particular writing system. There are separate code pages for different writing systems. Some code pages provide support for groups of languages, while other code pages provide support for only a single language.

LCID - List of Locale ID values as assigned by Microsoft.

Special - For the LOLI Loader to load component translation names into the WERCS Studio database, you must first set the linkage between the LOLI Language and your WERCS Studio Languages. In the Languages form, the LOLI Language Identifier codes are stored in the Special section.

Date Format - Date format indicates how to display the date. For PowerAuthor users, this is how the date displays in both the “live build” and “published” documents. (This example assumes that the date is Friday, July 10, 2015.)

Translation Source - Actual Microsoft Excel spreadsheet or XML files located in the Excel File Path setting, as specified in the application settings portion of this document (See the GCS reference manual for XML file information). The name you enter into this field must match the file name EXACTLY. If this field is left blank, contains a typographical error, or is different from the actual Excel filename, the application returns an error for that particular language, resulting in the language failing to load when launching the form.

RTF Codepage / RTF Encoding / HTML Encoding - Controls how the characters are displayed throughout WERCS Studio.

Stop character / Comma Character - Stop character and comma character for the language.

Culture Key - Controls acceptable date formats, based on Windows culture settings.

For more information, please visit: https://wercs.helpdocsonline.com/language-preferences-translation

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Viewing and managing audit history logs

The Audit History selection in the History menu displays the history of jobs that have been completed, the user or program that initiated the job, the entity that the job affected, and the date / time at which the job ran.

Accessing audit logs

From the Settings Navigational Menu, click History , then click Audit history.

The following form opens:

If there is excess history filling your tables, click Delete to clear the saved audit history.

For more information, please visit: https://wercs.helpdocsonline.com/eoosrqfebfjf5enugihs

Management

Managing product revisions, deleting products, components

These functions are available for managing product revision dates, and deleting products and their components.

For more information, please visit: https://wercs.helpdocsonline.com/management

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Managing product revision dates

The Revision Date Management selection on the Management menu enables you to change the revision date of some or all products. This enables you to send SDSs that haven't been delivered since the designated cutoff date.

Updating revision dates

From the Settings Navigational Menu, click Management , then click Revision Data Management .

The following form opens:

To view documents in a specific revision data range, click the associated cutoff date buttons.

The Select Date Webpage Dialog opens: Select your desired date from the calendar, or click Select Current Date to select the current date.

Once you have selected your desired dates, click Show .

Your data populates at the bottom of the form:

To update revision data, select a product by clicking the product's associated checkbox.

In the Update to field, select a date and then click Update now .

Product groups

To set up product groups, select a product by clicking the associated checkbox, then click Product Groups .

The Revision Date Groups Webpage Dialog opens: To create a new product group, enter a New Group ID and New Group Description/Name in the appropriate fields, then click Save .

To add the product to an existing group, select Add to Existing Group .

Select a product on the left-hand side of the form, then select a product group by clicking the checkbox next to the group.

After you have selected your desired group(s), click Save .

For more information, please visit: https://wercs.helpdocsonline.com/intblwwe1motwhtjioh9

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Deleting products and components

The Data Management selection on the Management menu enables you to delete products, components, and their associated data.

Deleting product data

From the Settings Navigational Menu, click Management , then click Data Management .

The following form opens:

To delete a product, select a product, then click Delete product .

A Message from webpage dialog opens, asking if you want to delete the product. Click OK .

To delete a component, select a component, then click Delete component .

A Message from webpage dialog opens, asking if you want to delete the component. Click OK .

For more information, please visit: https://wercs.helpdocsonline.com/hzspzvmtxry2jg2epbln

Publish Base Set 2

Publishing documents using base set options

The Publish Base Set selection on the Settings menu enables you to publish documents with a predefined set of publishing options via the Document Queue.

If a document is always published in multiple languages, you can create a base set that contains all of the necessary languages. Then, publishing the base set will publish the document in all of the required languages in one step.

Publishing documents

From the Settings Navigational Menu, click Publish base set .

The following form opens:

To create a new base set, click the Add New button.

The Publish Base Set – New Webpage Dialog opens.

Select a Format, Subformat and language by clicking the appropriate buttons.

Select an Authorization level from the dropdown menu. Additional information about Authorization levels can be found in the Power Author Plus reference .

After selecting your desired options, click Save .

For more information, please visit: https://wercs.helpdocsonline.com/publish-base-set-2

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Configuring sales organization information

The Sales Org selection on the Settings menu enables you to view sales organization and sub-organization information used during the distribution of Cover Letters and SDSs. This information is based on the Orders Interface data.

Adding a sales organization

From the Settings Navigational Menu, click Sales Org .

The Sales Org form opens:

To create a new sales organization, click the Add New button.

The Sales Organization – New Webpage Dialog opens. Enter your organizational information into the appropriate fields, then click Save .

For more information, please visit: https://wercs.helpdocsonline.com/fgmmt52fyiyakkazdaod

Mail Groups 2

Creating and managing mail groups for notifications

The Mail Groups selection on the Settings menu enables you to add new distribution lists, as well as contacts to the distribution list. WERCS Studio uses these names and lists for email notifications when you use the Change Notification form.

Accessing mail groups

From the Settings Navigational Menu, click Mail Groups .

The Distribution Lists / Receipts form opens:

Adding a distribution list

To add a new distribution list, click the Add New button from the Distribution Lists section.

The Lists – New Webpage Dialog opens. Enter a code for the list, then click Save . Codes are usually two to three letters, and are relevant to the recipients the list contains.

Adding a contact to a distribution list

To add a contact to a list, click the Add New button from the Recipients section.

The Recipient Data – New Webpage Dialog opens. Enter the recipient's contact information, then click Save .

For more information, please visit: https://wercs.helpdocsonline.com/mail-groups-2

Managing Batch Jobs Scheduling

Managing batch jobs and scheduling

The Batch Jobs selection on the Settings menu enables you to add, edit, delete, or control the frequency of your batch Jobs. These settings should not be changed without first contacting your Customer Service Representative.

Managing batch jobs

From the Settings Navigational Menu, click Batch Jobs .

The Job Information form opens:

To edit a batch job, select it, then click the Edit button.

The Edit Job Webpage Dialog opens. Select a scheduling option and input your desired parameters, then click Save .

For more information, please visit: https://wercs.helpdocsonline.com/managing-batch-jobs-scheduling

Speed Test

Running a network speed test in WERCS Studio

The Speed Test selection on the Settings menu enables you to test the speed of your network.

Starting a network speed test

From the Settings Navigational Menu, click Speed Test .

The Network Speed Test form opens. Click Start Test to start the speed test.

Individual test results appear in the Log field, and the total test results appear at the bottom of the form:

For more information, please visit: https://wercs.helpdocsonline.com/speed-test

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Analyzing orders by customer, product, and language

The Analyze Orders selection on the Settings menu enables you to view company orders based on customer, product, and language specifications.

Analyzing orders

From the Settings Navigational Menu, click Analyze Orders .

The following form opens:

From the Select report type dropdown menu, you can view reports for:

Not sent - Orders that have not been sent.

Sent more than one year ago - Orders that were sent over a year ago.

Due a revised document - Customers that are due a revised document.

Overdistribution - Orders that have been over-distributed.

If you select Due a revised document or Overdistribution from the dropdown menu, the results automatically populate at the bottom of the form. You do not need to click Show .

If you select Sent more than one year ago , select your date range by clicking the Calendar button, then clicking Show .

For more information, please visit: https://wercs.helpdocsonline.com/shp7i6ipqkvs3cqb5nhk

Admin Labe

Editing trade secret defaults by format/language

The Admin Labels selection on the Settings menu enables you to view and edit the trade secret defaults for each Format/language. The default values remain populated even if there is missing data or if component data needs to be masked by different information.

Editing trade secret defaults

From the Settings Navigational Menu, click Admin Labels .

The Form Name form opens.

Select a Format and language by clicking the button to the right of the respective Format and Language fields.

Enter the trade secret name that needs to be concealed, then click Save .

For more information, please visit: https://wercs.helpdocsonline.com/admin-labe

Change Notification

Setting up change notifications for admin events

The Change Notification selection on the Settings menu enables you to notify all contacts on a mail distribution list of any changes.

Managing change notifications

From the Settings Navigational Menu, click Change notification.

The following form opens:

To edit a listed event, select your desired event, then click the Form button.

The Notification Defaults – Edit Webpage Dialog opens:

You can edit the description of the event, the distribution list that receives the message, and the message that is received when this event occurs.

You can also activate the event by selecting the Active checkbox.

When finished, click Save .

For more information, please visit: https://wercs.helpdocsonline.com/change-notification

Passwords Acct Security

Configuring password and account security settings

The Account Administration selection on the Settings menu enables you to set password security requirements for WERCS Studio.

Managing account administration

From the Settings Navigational Menu, click Account Administration .

The Password security options form opens.

Specify the following parameters for your organization's password policies. When finished, click Save .

Enable password complexity - Select this checkbox to set your password complexity requirements:

Require minimum length - Designates the minimum length of characters required in a password. Select this checkbox if you wish to set a minimum character-length password, then enter the number of characters.

Require certain characters - Designates the types of characters that are required in a password. Select the checkboxes next to each type of character a person must use when creating a password. Uppercase Lowercase Number Special characters

Uppercase

Lowercase

Number

Special characters

Number of passwords to remember - The number of previously used passwords that Studio should remember.

Number of days to remember previous passwords - The number of days that Studio should remember previous passwords a person has used.

Number of days until a password expires – Enter the number of days a user can use a password until it expires.

Number of days prior to warn for expiration – Enter the number of days prior to the password expiration date that a user is warned that their current password is about to expire.

Number of allowed incorrect attempts – The number of times a user is allowed to enter an incorrect password until they are locked out.

Number of minutes to lockout a user after the amount of failed login has been reached – The number of minutes a user is logged out for after the number of failed login attempts has been reached.

For more information, please visit: https://wercs.helpdocsonline.com/passwords-acct-security

Logged In Users

Viewing currently logged in users

The Logged in Users selection on the Settings menu enables you to view the users who are currently logged into WERCS Studio.

Procedure

From the Settings Navigational Menu, click Logged In Users .

The following form opens, displaying the users currently logged into Studio:

For more information, please visit: https://wercs.helpdocsonline.com/logged-in-users

Font Groups

Setting default fonts for subformats and languages

The Font Groups selection on the Settings menu enables you to set a default font for an entire Subformat instead by individual data codes. Once a font is selected for the Subformat, individual Sections and Subsections can reference different font groups. Font Groups also enables you to configure a default font for a language.

Setting default fonts

From the Settings Navigational Menu, click Front Groups .

The Front Groups form opens. You can change the name of one of the fifty pre-populated groups by selecting a group and clicking the Edit button.

The Font Group Detail Webpage Dialog opens.

Enter a new name into the Name field.

Click Save .

To add a language to a font group:

Select a group in the Front Group Members section.

Click the Add New button.

The Add Font to Group Webpage Dialog opens.

Click the button to the right of the Language field to select a font type from the Font dropdown menu.

Click Save when finished.

For more information, please visit: https://wercs.helpdocsonline.com/font-groups

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For more information, please visit: https://wercs.helpdocsonline.com/quma4ynjxikp8ried1l3

Material Management

Welcome to Material Management

Material Management is a tool for viewing daily product/component activity and evaluating product compliance for individual, BOM-generated, or Alternate product structures. It supports role-specific workflows by providing access to relevant product data and compliance controls.

With Material Management, you can:

Monitor daily product/component activity

Evaluate and modify product compliance

View and manage relevant product data to support each user role’s daily activities

Key Functional Areas

Activity Monitoring – Track daily changes and interactions with products and components.

Compliance Evaluation – Review and adjust compliance status across various product structures.

Role-Based Data Access – Display product data tailored to the needs of different user roles.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/material-management

Accessing Material Management

Accessing Material Management

Use the Material Management tools to view and manage material-related data across WERCS Studio. This section introduces how to access the module and what areas are available once inside.

Module Access

From the Management menu, select Material Management :

Material Management Main Form

For more information, please visit: https://wercs.helpdocsonline.com/accessing-material-management

My Products

Viewing and Managing In-House Manufactured Products

Selecting the My Products tab opens a form that displays a grid tailored to the Regulations and Attributes template assigned to your user role. Each product displays an icon indicating its compliance status for each A/B regulation type or regulation category. This information appears in the SDS.

Regulation Category Icons

A product can display one of the following icons for a regulation category:

Hover over an icon to view additional details, including the component that may be causing the product to fail.

Use the arrow buttons at the top of the grid to navigate between pages. You can also enter a page number to jump directly to a specific page.

To view input products and their components:

To navigate using breadcrumbs:

To upload an image for a product:

The following form opens. Select an image to upload, then click Save .

Product Status Icons

Editor Panel

Use the Editor Panel to view and modify product data (if you have Full Access). To open the panel:

Select a product.

Details

To edit a PTXT value:

To edit a PVAL value:

Click Edit .

Enter the new value in the New Value field.

Click Save .

To add a supplier:

Double-click a supplier from the list to add it.

To navigate to the Configuration form:

Regulations

The Regulations Tab displays the regulations and/or regulation categories defined for the assigned template in the Regulation Configuration section of the Regulations / Attributes configuration form.

To expand a regulation category:

Click the + next to the category.

To add a regulation bypass at the component level:

In the Reg Attach Product pop-up, in the Reg Override Type field, select one of the following, then click Save .

If the component is listed on the compliance list, the bypass ensures it always passes .

Select a product.

Click Edit on the Regulations tab.

Activity

The Activity tab displays workflows, tasks (if used), and product notes. To view or add notes:

In the Product Notes form, review previous notes.

Enter a new note in the New Notes field.

Documents

The Documents tab allows you to view and add related or published documents.

To add a document:

Linked Materials

To add a product to the alternate group:

If you have selected an Active Alternate, you can add a product to the alternate group by clicking the Add New button.

To delete a product from the group:

Select the product.

To assign sites or suppliers:

To open the Related Product Group Manager form, click the Add New button.

Select a product.

Click Add New .

To link a supplier or entity:

In the Edit Linkage pop-up, Click the browse icon.

Select a supplier or entity from the Browse Entities form.

Click Save .

To manage entities and suppliers:

Click Manage Entities .

To manage product groups:

Click Manage Entities .

For more information, please visit: https://wercs.helpdocsonline.com/my-products

Material Mgmt Editor Panel

Use the Editor Panel to View and Modify Product Data

Use the Editor Panel to view and modify product data (if you have Full Access). To open the panel:

Select a product.

Details

To edit a PTXT value:

To edit a PVAL value:

Click Edit .

Enter the new value in the New Value field.

Click Save .

To add a supplier:

Double-click a supplier from the list to add it.

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To add a product to the alternate group:

If you have selected an Active Alternate, you can add a product to the alternate group by clicking the Add New button.

To delete a product from the group:

In the Related Product Group Manager form, select the product.

To assign sites or suppliers:

Click Save .

To manage entities, suppliers and product groups by clicking the Manage Entities button:

For more information, please visit: https://wercs.helpdocsonline.com/material-mgmt-editor-panel

Adding New Products

Creating New Products with Measurement and Source Options

Access the New Product Form

To begin:

Enter a Product ID and a Product Name in the appropriate fields.

Product Source – Select whether the product is manufactured (standard in WERCS Studio) or purchased (vendor product).

If you click Save , additional tabs appear at the top of the pop-up. To assign the product to a regulation category:

Click the Category tab.

From the Search tab, enter a category name in the Search field.

Click Search to locate and select the desired category.

For more information, please visit: https://wercs.helpdocsonline.com/adding-new-products

Editing Products

Modifying Product Details Using Power Entry

Access the Power Entry Form

To edit a product:

View and Edit Product Formulation

To view and edit a product’s formulation:

Right-click a component and select Edit Component to change the unit to either grams or kilograms .

View and Edit the BOM

To view and edit the BOM:

Click the BOM tab. A form similar to the BOM module opens. For more details, refer to Accessing the BOM Module .

If the product contains a weight-based formulation, the weight icon appears.

For more information, please visit: https://wercs.helpdocsonline.com/editing-products

Regulation Map

Visualizing Global Regulatory Compliance

Access the Regulation Map

To open the map:

Interpret Compliance Status by Country

The map uses color coding to indicate compliance:

Red – At least one item in the country has a negative compliance status.

Green – All items in the country are compliant.

For more information, please visit: https://wercs.helpdocsonline.com/regulation-map

Autogenerate 2

Automatically Generating Product Compliance Data

Apply Filters and Access the Autogenerate Tool

To begin:

Apply your desired filter to the product list.

You can choose to autogenerate compliance data for:

Filtered – Click Filtered to autogenerate all products in the filtered group.

Selected – Click Selected to autogenerate only the currently selected product.

For more information, please visit: https://wercs.helpdocsonline.com/autogenerate-2

Product Filter

Filtering Products by Criteria and Saving Custom Views

Apply Filtering Criteria

To begin filtering:

Select a filter category from the left-hand column.

Enter your filtering criteria.

Click Add to apply the condition.

Click Close to view the filtered data or continue adding filters.

Manage Individual Filters

Save and Manage Filter Views

When viewing filtered data in the My Products grid:

Enter a filter name in the field at the upper right-hand corner.

To delete a saved filter:

Click Manage Filters .

In the Manage Filters form, select the filter you want to delete.

For more information, please visit: https://wercs.helpdocsonline.com/product-filter

Apply Rules

Executing Compliance Rules on Selected Products

Access the Apply Rules Pop-Up

To begin:

For more information, please visit: https://wercs.helpdocsonline.com/apply-rules

Vendor Products

Managing Purchased Products for BOM Assembly

For more information, please visit: https://wercs.helpdocsonline.com/vendor-products

Alternates

Managing Alternate Products and Regulatory Roll-Up

Identify and Promote Active Alternates

To promote an alternate product to the Active Alternate:

The New Product Group pop-up opens with the Product Group ID and Description pre-filled (editable). The Group has alternates checkbox is selected and cannot be changed.

Regulatory Roll-Up for Active Alternates

Regulatory roll-up behavior depends on whether the Active Alternate contains additional alternates or a BOM structure.

If the Active Alternate has no additional alternates and no BOM, regulatory roll-up is determined by its formulation , unless a manual product-level override or component by-pass is applied.

If the Active Alternate includes non-active alternates (not in a BOM), compliance is inherited from those alternates:

For a single Reg A/B: If any non-active alternate passes, the Active Alternate passes. If all non-active alternates fail, the Active Alternate fails. If all non-active alternates are indeterminate, the Active Alternate is indeterminate.

If any non-active alternate passes, the Active Alternate passes.

If all non-active alternates fail, the Active Alternate fails.

If all non-active alternates are indeterminate, the Active Alternate is indeterminate.

Active Alternate Contains Both Alternates and a BOM

Once alternates are part of a BOM, the Master Product inherits compliance only from the Active Alternate , similar to standard input products:

For a single Reg A/B: If any input product in the BOM tree fails, the Master Product fails. If all input products pass, the Master Product passes. If all input products are indeterminate, the Master Product is indeterminate.

If any input product in the BOM tree fails, the Master Product fails.

If all input products pass, the Master Product passes.

If all input products are indeterminate, the Master Product is indeterminate.

Once a BOM structure is created, regulatory roll-up comes from the input products unless :

A product-level override is applied to the master product.

A component by-pass is applied at the master product formulation level.

For more information, please visit: https://wercs.helpdocsonline.com/alternates

Pcn

Welcome to PCN

Poison Center Notification (PCN) utilizes your existing Studio data to prepare and validate dossiers for submission to ECHA's PCN portal. It supports harmonized health emergency response reporting by transposing SDS data and verifying dossier compliance.

With PCN, you can:

Identify substances and mixtures-in-mixtures from the bill of material's formulation

Transpose data from an SDS into the proper dossier format

Check the dossier against ECHA-defined validation rules

Submit the dossier via ECHA's system-to-system (S2S) PCN portal

View and manage past submission history

Key functional areas

Formulation Identification – Detect substances and mixtures-in-mixtures from BOM formulations.

SDS Transposition – Convert SDS data into the required dossier format.

Validation Checking – Verify dossier accuracy against ECHA validation rules.

S2S Submission – Submit dossiers directly to ECHA via the system-to-system portal.

Submission History Management – Access and manage records of past dossier submissions.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/pcn

Accessing Pcn

Accessing PCN

Use PCN to manage product compliance notifications within WERCS Studio. This topic explains how to access PCN and describes the layout of the Welcome form.

Module access

PCN Welcome Form layout

The Welcome form includes five functional areas, enabling you to configure your PCN session:

Administration Menu – Access PCN administration options.

Data Entry Page Selection – Select to enter information for a finished good or a mixture in mixture (MiM).

Select a Language – Choose a language to view the data entry page in (where applicable).

Select a Product – Select an existing product to enter information for.

Continue – After selecting the required options, click Continue to navigate to the main PCN form.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-pcn

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Navigating the PCN Welcome form

Selecting a data entry page, language and task type

Select one of the following task options: New Product New product from existing product Edit existing product Edit existing product, first overwrite data from selected product

New Product

New product from existing product

Edit existing product

Edit existing product, first overwrite data from selected product

The fields that follow in the Task options section are dependent on which selection you make:

The fields that follow in the Task options section are dependent on which selection you make:

New product

If you select New Product in the Select a task section, the following fields appear in the Task options section:

To automatically populate a Product ID, select the Auto-increment product ID checkbox. Then select an appropriate prefix from the Product ID prefix dropdown menu.

To manually enter a Product ID, clear the Auto-increment product ID checkbox and enter the ID in the Product ID textbox.

New product from existing product

When you select New product from existing product in the Select a task section, the following fields appear in the Task options section:

Click the button to the right of the Select Source Product field, then use the Filtering tool to select an existing source product.

To select a product by composition, click Search by CAS composition .

In the Find Product By Composition dialog, click Add New and use the Filtering tool to select your desired components.

Review selected components in the top section. Matching products containing all selected components appear in the bottom section.

Select a product from the Matching Product section, then click Select Product .

Edit existing product

When you select Edit existing product in the Select a task section, the following fields appear in the Task options section:

Edit existing product, first overwrite date from selected product --

When you select Edit existing product, first overwrite data from selected product in the Select a task section .
The following fields appear in the Task options section:

Click the appropriate buttons to the right of the Select Source Product and Destination Product fields, then use the Filtering tool to select both a source and destination product.

For more information, please visit: https://wercs.helpdocsonline.com/vpksysrapdifqjs12tcd

Accessing Administration Menu Options

Accessing Administration Menu options

To configure PCN settings, access the Administration menu.

The Administration menu enables Studio Administrators to manage products, legal entities, market languages, templates, history, and emergency contacts.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-administration-menu-options

Pcn Managing Products

Managing products

Use Manage Products to view product attributes to help select the product.

To view product attributes and select a product:

For more information, please visit: https://wercs.helpdocsonline.com/pcn-managing-products

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Managing legal entities

Use Legal Entities to manage the Legal Entities utilized for the dossier.

Adding a legal entity

To add a new legal entity:

Enter the following information:

Code – Unique identifier for the legal entity.

Name – Name of the legal entity.

Address – Click the address button to select an address.

Legal Entity Type – Select from the dropdown menu.

Description – Enter a description for the legal entity.

UUID – Enter the legal entity UUID.

Click Save .

Click Save .

For more information, please visit: https://wercs.helpdocsonline.com/otb56yfozyst9ckfrhtz

Pcn Managing Mkt Languages

Managing market languages

Use Market Languages to manage the required and optional languages for each market. The initial default languages are set by Studio; adjustments can be made to meet specific needs.

Adding market languages

To add a language to a market:

Select a country from the Countries section.

Select a country from the Countries section.

In the Add Language form:

Select a language.

For more information, please visit: https://wercs.helpdocsonline.com/pcn-managing-mkt-languages

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Managing market templates

Use Market Templates to create and edit templates that can automatically select markets and associated languages and emergency contacts for the dossier submission.

Creating market templates

To create a new market template:

In the Market Templates form:

Enter a Template Name in the Template field.

Click Save . The template is now available from the Template dropdown menu on the Market Languages form.

Click Save . The template is now available from the Template dropdown menu on the Market Languages form.

For more information, please visit: https://wercs.helpdocsonline.com/wizzbrk6r0nnygquen5b

Pcn Viewing History

Viewing dossier history

Use the History form to view the history of the dossiers that have been previously submitted to ECHA.

Additional details about this form are available in Viewing submission history and downloading dossier files .

For more information, please visit: https://wercs.helpdocsonline.com/pcn-viewing-history

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Managing emergency contacts

Adding emergency contacts

To add a new emergency contact:

Click Administration , then select Emergency Contact to open the following form:

Click Administration , then select Emergency Contact to open the following form:

Enter the following information:

Address – Click the address button to select an address.

Contact Information – Insert emergency contact details in the appropriate fields.

Click Save .

Click Save .

For more information, please visit: https://wercs.helpdocsonline.com/qvgik584nhzefd7mscly

Pcn Specific Data Elements

Entering and managing PCN-specific data elements

Enter and manage PCN-specific data elements using the main form of the PCN module. Although most dossier data is derived from the EU CLP Safety Data Sheet, certain fields require manual input. This topic outlines how to enter and edit data, and describes additional tools available in the Main form.

Editing data elements

Click the name of the element or use the Actions column to begin editing.

The input method varies depending on the data type.

PTXT: single phrases

Select from a dropdown menu on the data entry page.

Multiple phrases

PVAL: value fields

Repeating dataset (PTXT & PVAL)

Click Add New to populate the section with empty fields and selection options.

Enter values into the PVAL fields.

GRPH: graphic-based elements

To upload a new image:

Click Save .

Free Text

Type the text into the field.

Click OK to save.

Additional Main form tools

History – View submission history of dossiers sent to ECHA.

Disabling – Disable an active submission for a product/market combination.

Preview – View a detailed preview of non-custom sections.

Publish – View the data ownership report.

Main Menu – Return to the Welcome form.

Reset All – Reset the status of all tabs to grey.

For more information, please visit: https://wercs.helpdocsonline.com/pcn-specific-data-elements

Generics Identification

Identifying generic components in product formulations

Use this form to identify whether input products and their components are perfumes, colorants, or neither, enabling you to support PCN dossier preparation.

Accessing the Generics Identification page

Each input product is listed with its associated generic classification and component details.

Classifying input products

Use the dropdown menu to classify each input product:

Classifying components and setting typical concentration

After expanding the input product, use the dropdown menus to classify each component and manage concentration settings:

From the Generic dropdown menu, select whether the component is a colorant or perfume .

From the Generic dropdown menu, select whether the component is a colorant or perfume .

Completing the page

After selecting the generic options:

Click Next to complete the page and navigate to the next page.

Click Next to complete the page and navigate to the next page.

Clicking Next runs the transposition rules to take data from the product’s EGHS template and transpose it to the PCN datacodes format required for submissions to ECHA.

Clicking Next runs the transposition rules to take data from the product’s EGHS template and transpose it to the PCN datacodes format required for submissions to ECHA.

For more information, please visit: https://wercs.helpdocsonline.com/generics-identification

Print Flags

Setting print flags for substances and mixtures

Use this form to review and manually adjust print flags for substances and mixtures, enabling you to finalize PCN model preparation.

Accessing the Print Flags page

The Print Flags page opens automatically after completing the previous page. Print flag options are preselected based on the results of the transposition rules.

Each substance listed includes a print flag option indicating whether it is a valid (known) substance or identified as generic. These substances can be reported to ECHA unless they are contained in a MiM.

Editing print flags

Use the checkboxes to manually adjust the print flags: Select or clear checkboxes to indicate whether each substance should be reported to ECHA.

After selecting the print flag options:

Click Next to complete the page.

Click Next to complete the page.

A set of rules runs to build the PCN model and identify the MiMs.

A set of rules runs to build the PCN model and identify the MiMs.

For more information, please visit: https://wercs.helpdocsonline.com/print-flags

Mixtures In Mixtures

Managing and reviewing nested Mixtures in Mixtures formulations (MiMs)

Use this form to manage and review Mixtures in Mixtures (MiMs), enabling you to ensure accurate PCN model creation and compliance with submission requirements.

The Mixtures in Mixtures page opens automatically after completing the previous page. MiMs are pre-identified based on the rules that ran during the transposition process. Each input raw material identified as a MiM is listed. If the raw material has not yet been processed through the PCN workflow, it must be edited to establish correct PCN dossier input information.

Editing MiM flags and accessing additional details

To process a MiM:

After setting the MiM data, close the pop-up form to continue with the main PCN template and submission process.

After setting the MiM data, close the pop-up form to continue with the main PCN template and submission process.

Reviewing MiM formulations

To ensure compliance, each designated MiM formulation must be manually reviewed to determine whether to report the exact concentration or a range for each MiM component.

Note – Per some Poison Centre appointed bodies, the exact concentration of MiM components is often unknown. A range should be provided instead.

Note – Per some Poison Centre appointed bodies, the exact concentration of MiM components is often unknown. A range should be provided instead.

PCNM model creation

When Next is clicked on the PCN Print Flags form:

A PCNM model is built for each designated MiM (one PCNM model per MiM).

The model is populated with values from the master formulation.

Note – If a PCNM model already exists, its components and percentages are compared against the master formulation. If no changes are detected, the model is not rebuilt.

Note – If a PCNM model already exists, its components and percentages are compared against the master formulation. If no changes are detected, the model is not rebuilt.

During model creation:

A Review link displays in the MiM Formulation column if the model is new or changes were detected.

A Complete link displays if the formulation was previously reviewed and no changes were detected.

Reviewing the formulation

If a MiM formulation requires review:

Note – If the MiM was used in prior submissions, rows with detected changes are highlighted for informational purposes only.

Note – If the MiM was used in prior submissions, rows with detected changes are highlighted for informational purposes only.

Select the Use Range checkbox for the component.

Completing the page

After all MiM formulations are marked as complete:

Click Next to complete the page and continue to the next step in the submission process.

For more information, please visit: https://wercs.helpdocsonline.com/mixtures-in-mixtures

Dossier Information

Editing dossier metadata for submission

Use this form to enter and edit dossier metadata for the product, enabling you to prepare the submission package for ECHA.

The Dossier Information page opens automatically during the PCN submission workflow.The form provides fields to enter or update dossier metadata, including product identifiers, submission type, and other relevant details. To update dossier metadata:

Enter the desired information in the available fields.

Enter the desired information in the available fields.

Review the entries for accuracy and completeness.

Review the entries for accuracy and completeness.

Completing the page

After entering the metadata:

Click Next to complete the page and continue to the next step in the submission process.

For more information, please visit: https://wercs.helpdocsonline.com/dossier-information

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Providing general product details for the dossier

The General Information page opens automatically during the PCN submission workflow. The form provides fields to enter general product information such as product name, intended use, physical state, and other relevant attributes.

To update general product details:

Enter the desired information in the available fields.

Enter the desired information in the available fields.

Review the entries for accuracy and completeness.

Review the entries for accuracy and completeness.

After entering the general information, click Next to complete the page and continue to the next step in the submission process.

After entering the general information, click Next to complete the page and continue to the next step in the submission process.

For more information, please visit: https://wercs.helpdocsonline.com/q3ztja494mnedtdkj4tw

Classification And Labeling

Defining hazard classifications and labeling information

The Classification and Labeling page opens automatically during the PCN submission workflow. The form provides fields to define hazard classifications, signal words, pictograms, hazard statements, precautionary statements, and other labeling elements. To update hazard and labeling details:

Enter the desired classification and labeling information in the available fields.

Enter the desired classification and labeling information in the available fields.

Review the entries to ensure they align with the product’s hazard profile and regulatory standards.

Review the entries to ensure they align with the product’s hazard profile and regulatory standards.

After entering the classification and labeling information, click Next to complete the page and continue to the next step in the submission process.

After entering the classification and labeling information, click Next to complete the page and continue to the next step in the submission process.

For more information, please visit: https://wercs.helpdocsonline.com/classification-and-labeling

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Viewing and confirming product formulation details

The Formulation page opens automatically during the PCN submission workflow. The form displays the complete formulation for the selected product, including all components and their associated concentrations.

To confirm the formulation:

Review the listed components and concentrations for accuracy.

Review the listed components and concentrations for accuracy.

Ensure the formulation aligns with the product’s master formulation and regulatory requirements.

Ensure the formulation aligns with the product’s master formulation and regulatory requirements.

After reviewing the formulation, click Next to continue to the next step in the submission process.

After reviewing the formulation, click Next to continue to the next step in the submission process.

For more information, please visit: https://wercs.helpdocsonline.com/pzich4skafucnx3a4zqq

Physical Properties

Entering physical and chemical properties for the product

The Physical Properties page opens automatically during the PCN submission workflow. The form provides fields to enter physical and chemical characteristics such as appearance, pH, flash point, boiling point, and other relevant data. To update physical and chemical property information:

Enter the desired values in the appropriate fields.

Enter the desired values in the appropriate fields.

Review the entries to ensure accuracy and alignment with the product’s specifications.

Review the entries to ensure accuracy and alignment with the product’s specifications.

After entering the physical properties, click Next to complete the page and continue to the next step in the submission process.

After entering the physical properties, click Next to complete the page and continue to the next step in the submission process.

For more information, please visit: https://wercs.helpdocsonline.com/physical-properties

Packaging

Defining packaging details for the product

Enter the desired information in the available fields.

Enter the desired information in the available fields.

Review the entries to ensure they reflect the actual packaging used for the product.

Review the entries to ensure they reflect the actual packaging used for the product.

After entering the packaging information, click Next to complete the page and continue to the next step in the submission process.

After entering the packaging information, click Next to complete the page and continue to the next step in the submission process.

For more information, please visit: https://wercs.helpdocsonline.com/packaging

Submission Selection

Selecting markets, languages, and legal entities for submission

Use this form to select markets, languages, and legal entities for the dossier, enabling you to configure submission details for ECHA.

Selecting markets and languages

Use the Markets section to define where the product will be submitted and which languages and emergency contacts apply.

In the Market Languages pop-up:

To select a market for submission:

Select the market’s corresponding Place checkbox.

The form expands to display required and optional languages and emergency contacts for the selected markets:

Select any desired optional language(s).

To stop selling a product in a market:

Select the corresponding Cease checkbox.

After all selections are made, click Save to add the market to the dossier submission.

After all selections are made, click Save to add the market to the dossier submission.

Using market templates

Market templates help automate market, language, and emergency contact selections for future submissions.

After selecting an alias, choose a previously created template from the Template dropdown menu. The template prepopulates market, language, and emergency contact selections.

To save current selections as a new template: Select the Save As New Template checkbox. Enter a template name in the provided field before saving.

To save current selections as a new template:

Select the Save As New Template checkbox.

Enter a template name in the provided field before saving.

Selecting legal entities and submission types

In the Manage Alias Attributes form:

Click Add New to add an attribute.

In the UFI Management form:

From the Assigned Legal Entity section, click the button to select a legal entity.

The selected entity's information appears below.

To add an alias to a submission:

For each selected legal entity, choose the submission type:

For an initial notification, click Generate PCN Number to populate the PCN Number field.

For an Update, if previously submitted, the PCN number prepopulates. Enter the PCN number. Select a reason from the Reason dropdown menu.

Enter the PCN number.

Select a reason from the Reason dropdown menu.

Click Generate PCN Number.

Completing the page

After selecting all desired submission options:

Click Next to complete the page and continue to the Validation Summary page.

For more information, please visit: https://wercs.helpdocsonline.com/submission-selection

Validation Summary

Reviewing and submitting validated dossiers to ECHA

Reviewing validation results

To review the dossier:

If the dossier is error-free:

The Submit button appears.

Downloading the dossier preview

To download a preview of the submission package, click Download to generate a ZIP file containing the XML and manifest files required for ECHA submission. This is a dossier preview:

Completing the page

Note – The Next button is greyed out on the Validation Summary page because it is the final page in the workflow. From this page, either submit the dossier or navigate to a previous section to make changes.

Note – The Next button is greyed out on the Validation Summary page because it is the final page in the workflow. From this page, either submit the dossier or navigate to a previous section to make changes.

For more information, please visit: https://wercs.helpdocsonline.com/validation-summary

History 2

Viewing submission history and downloading dossier files

Accessing the Submission History form

To access the History form:

Viewing submission details

To view additional information about a submission:

If the validation failed:

To view the submission on the ECHA website, click the Submission Name link:

Using alias view

The History form table can also be changed to a flattened view of the alias data, which allows for the filtering of alias data.To switch to a flattened view of alias data:

To view the full submission history for an alias:

Select the alias.

For more information, please visit: https://wercs.helpdocsonline.com/history-2

Alias View

Disabling incorrect or obsolete submissions

Use this form to disable active submissions for a product/market combination when a major error has occurred, enabling you to prevent incorrect data from being used in future PCN workflows. This action is distinct from Ceasing , which is used to discontinue dossiers for inactive markets.

Accessing the Disabling form

Main form

The Disabling form opens and contains the following sections:

Most Recent Submission – Displays the most recent submission record for the selected product.

Submission History – Displays all other submission records for the product, sorted by submission date. This section includes records across multiple legal entities.

Disabling History Button – Opens a view of all previously disabled submissions.

Disable Most Recent Submission Button – Disables only the most recent submission.

Disable All Submissions Button – Disables all submissions for the product.

Disabling a submission

To disable a submission:

Click either Disable Most Recent Submission or Disable All Submissions .

Click either Disable Most Recent Submission or Disable All Submissions .

The Reason for Disabling pop-up opens, displaying: Selected Submission(s) – A detailed view of the submission(s) selected for disabling. Reason for Disabling – Select one of the following reasons: Dossier contains incorrect information that cannot be updated easily Wrong type of update was chosen Test notification was sent to production site Wrong legal entity was used

The Reason for Disabling pop-up opens, displaying:

Selected Submission(s) – A detailed view of the submission(s) selected for disabling.

Reason for Disabling – Select one of the following reasons: Dossier contains incorrect information that cannot be updated easily Wrong type of update was chosen Test notification was sent to production site Wrong legal entity was used

Dossier contains incorrect information that cannot be updated easily

Wrong type of update was chosen

Test notification was sent to production site

Wrong legal entity was used

Click Submit to send the job to the Job Queue. The status changes to Disable Pending until processing completes. Once complete, the status changes to Disabled , and the record is only viewable from the Disabling History form.

Click Submit to send the job to the Job Queue.

The status changes to Disable Pending until processing completes.

Once complete, the status changes to Disabled , and the record is only viewable from the Disabling History form.

Note – If only the most recent submission is disabled, the next sequential record from the submission history becomes the new most recent submission.

Note – If only the most recent submission is disabled, the next sequential record from the submission history becomes the new most recent submission.

Viewing disabling history

To view previously disabled submissions:

Click the Disabling History button from the Disabling form.

Click the Disabling History button from the Disabling form.

Migrated products

Products that have been migrated into Studio from another system that had prior PCN submissions need to have their entire submission history disabled before a new submission can be made via the Studio PCN module.

For products migrated into Studio from another system:

All prior submission records must be disabled before a new submission can be made using the Studio PCN module.

To disable all previous submissions:

Click the alert to open the disabling pop-up.

Click the alert to open the disabling pop-up.

Click Submit to send the job to the Job Queue.

Click Submit to send the job to the Job Queue.

For more information, please visit: https://wercs.helpdocsonline.com/alias-view

Alias Reassignment

Reassigning aliases and managing submission continuity

Use this form to reassign aliases to new parent products and manage submission continuity, enabling you to avoid validation errors and maintain accurate PCN submission records.

Understanding alias reassignment

Aliases can be reassigned to new parent products due to formulation changes, plant changes, or other business reasons. Once reassigned, submissions can still be made for both the original and new parent products, but specific steps must be followed to avoid validation errors.

Reassignment logic

When an alias is reassigned:

A new record is created in the Reassignment History form for the alias, regardless of whether it had prior PCN submissions.

The original parent product is flagged if the alias had prior market placements under it. This flagging occurs in the background and requires no action during reassignment.

The alias ID remains consistent across both the original and new parent products.

Viewing reassignment history

To view the reassignment history for an alias:

Open the Product Aliases form in the Authoring modules.

Select an alias.

Managing future submissions

Original parent product

When submitting the original parent product after reassignment:

To avoid BR572:

Note – PCN identifies these UFIs during validation by scanning the submission history for the last successful submission with the same PCN number. Identified UFIs appear in the BR572 error message.

To avoid BR575:

New parent product

When submitting for the transferred alias under the new parent product:

A QLT618 error may occur because ECHA detects the UFI was previously submitted under a different PCN number.

Warning: This error can only be avoided by disabling the submissions under the original parent product.

Viewing submission history for reassigned aliases

To view submission history for a reassigned alias:

Open the History form.

Click the Alias tab.

Note: History only includes assignments made after the 71.28 Studio release. Earlier assignments do not appear in extended history.

For more information, please visit: https://wercs.helpdocsonline.com/alias-reassignment

Rule Writer

Welcome to the Rule Writer

Rule Writer allows you to create rules to automatically write substantial portions of SDSs, product data sheets, labels, and other documents. This automation brings speed, consistency, and accuracy to the document creation process.

This reference provides accurate product knowledge regarding the Rule Writer module. For additional questions, please contact your Customer Service Representative.

With Rule Writer, you can:

Automate your authoring process to increase speed and consistency

Perform programmed calculations

Run several functions simultaneously with rule groups and rule streams

Key Functional Areas

Authoring Automation – Use rules to automatically populate SDSs, labels, and other documents.

Programmed Calculations – Execute embedded calculations as part of rule logic.

Rule Groups and Streams – Organize and run multiple functions simultaneously for efficient processing.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/rule-writer

Accessing Rule Writer

Accessing Rule Writer

This section gives a brief overview of the Ruler Writer, including how to access it from WERCS Studio, and a summary of the options.

Rule Writer Module Access

From the Management menu, select Rule Writer .

Rule Writer Main Form

Navigational Tabs – Access the Rule Writer Main form, rule streams, stream comparisons, and rule B extensions.

Navigational Tabs – Access the Rule Writer Main form, rule streams, stream comparisons, and rule B extensions.

Rule Groups – Listing of existing rule groups.

Rule Groups – Listing of existing rule groups.

Rules – Listing of rules within a selected rule group.

Rules – Listing of rules within a selected rule group.

Action Buttons – View and create rules, apply rules, groups, and streams to products, and access additional tools.

Action Buttons – View and create rules, apply rules, groups, and streams to products, and access additional tools.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-rule-writer

Rules

Understanding and Creating Different Rule Types

Accessing the Rules List

Rules Editor Form

The Rules Editor Webpage Dialog opens, displaying the complete list of rules.

Selecting a rule displays its associated comments and description at the bottom of the form.

Creating a New Rule

To create a new rule:

Click the Add New button to open the New Rule Webpage Dialog .

Click the Add New button to open the New Rule Webpage Dialog .

Select the desired rule type and a relevant name for the rule. Each rule type has unique properties and input/output requirements. Ensure the selected type aligns with the intended logic and data structure.

Select the desired rule type and a relevant name for the rule.

Each rule type has unique properties and input/output requirements.

Ensure the selected type aligns with the intended logic and data structure.

For more information, please visit: https://wercs.helpdocsonline.com/rules

Type A Rules Component Based

Type A Rules – Component-Based

Type A rules use formulation-level components to apply product-level attributes (PTXT , PVAL , and GRPH) to selected subsections, enabling you to dynamically control SDS content and formatting. These rules are structured as IF/AND/THEN statements and can also be used to suppress subsections from appearing on the SDS.

Creating a Type A Rule

IF Section

Use this section to define the input component:

AND Section

THEN Section

Specify the output behavior:

Select a Subsection affected by the output of your rule.

Click the button to the right of the Subsection field.

Selecting Output Usage Types

Depending on the desired output, choose one of the following usage types:

PTXT – Adds phrases:

In the Select Product Data Webpage Dialog , select your phrase(s).

To add new phrases, click Add phrases.

PVAL – Adds a value:

Enter a value in the Value field.

GRPH – Adds a graphic:

Click Save .

Managing Multiple Subsections

To add phrases for multiple subsections:

Select a subsection from the Select Product Data pop-up.

Click Add phrases and select your desired phrases.

To reorder phrases:

In the Reorder Phrases pop-up, drag phrases into the desired order.

To control how new data interacts with existing attributes:

Select the Replace checkbox to overwrite existing phrases/values.

Leave it unselected to append new phrases/values.

Finalizing the Rule

Add any relevant comments in the Comments field.

Click Save to create the rule.

A confirmation message appears. Click OK to complete the process.

For more information, please visit: https://wercs.helpdocsonline.com/type-a-rules-component-based

Type B Rules Phrase Value Symbol Based

Type B Rules – Phrase, Value, Symbol-Based

Use this form to create Type B rules that apply product-level attributes— PTXT , PVAL , and GRPH —to selected subsections based on product-level data, enabling you to control SDS content using conditional logic and extensions.

Creating a Type B Rule

Creating a Type B rule opens a dialog that allows you to define complex logic using compound IF/THEN statements with AND/OR conditions. You have the option to make your rule a regional rule.

Regional rules allow different phrases on regional SDSs, based on that region's specific adoption of GHS.

Regions replace or append the appropriate prefix found in the GHSENGINE settings and are selected from the Apply Rules dialog.

Defining Rule Conditions

To define the input logic:

Select an input Format from the dropdown.

Use the Filtering tool to select a Subsection .

Choose a parameter: Contains – Product contains the selected attribute. Does Not Equal – Product does not contain the selected attribute. Has Any Value – Product contains any value for the selected subsection. Has No Value – Product does not contain any value for the selected subsection.

Contains – Product contains the selected attribute.

Does Not Equal – Product does not contain the selected attribute.

Has Any Value – Product contains any value for the selected subsection.

Has No Value – Product does not contain any value for the selected subsection.

To add additional conditions, click the Extensions button.

Defining Rule Outputs

To configure the output logic:

Select a Subsection affected by the output of your rule.

Click the button to the right of the Subsection field.

To apply the rule to multiple subsections, select the Multiple Subsections checkbox.

Choose a usage type: PTXT – Click Add phrases , select your phrases, then click OK . PVAL – Enter a value in the Value field, then click OK . GRPH – Click the [graphic icon] , select a graphic in the dialog, then click Save .

PTXT – Click Add phrases , select your phrases, then click OK .

PVAL – Enter a value in the Value field, then click OK .

GRPH – Click the [graphic icon] , select a graphic in the dialog, then click Save .

To add phrases for multiple subsections: Select a subsection from the Select Product Data pop-up. Click Add phrases and repeat for each subsection.

Select a subsection from the Select Product Data pop-up.

Click Add phrases and repeat for each subsection.

To reorder phrases: Right-click a phrase and select Reorder . In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

Right-click a phrase and select Reorder .

In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

Select the output action: Append – Add listed phrases to existing phrases. Replace – Remove existing phrases/values and replace with listed attributes. Delete – Remove listed phrases but retain other existing phrases. Exit Group – Skip remaining rules in the group and proceed to the next rule group.

Append – Add listed phrases to existing phrases.

Replace – Remove existing phrases/values and replace with listed attributes.

Delete – Remove listed phrases but retain other existing phrases.

Exit Group – Skip remaining rules in the group and proceed to the next rule group.

Add any relevant comments in the Comments field.

Click Save to create the rule.

When the confirmation message appears, click OK .

Rule B Extensions

Type B rules support reusable extensions authored separately in the database, enabling you to build compound logic using AND/OR statements.

To create or link extensions:

Click the Extensions button while creating a Type B rule.

To link to an existing extension, right-click the extension and select Link as AND or Link as OR .

To create a new extension: Click Add New again. Follow the same steps used to create a Type B rule. Click Save .

Click Add New again.

Follow the same steps used to create a Type B rule.

Click Save .

After linking, the Extended conditions apply checkbox is selected.

Click Close to return to the Rule View form.

You can also view and create Rule B extensions by clicking Rule B Extensions from the navigation menu on the Rule Writer Main form .

You can also view and create Rule B extensions by clicking Rule B Extensions from the navigation menu on the Rule Writer Main form .

For more information, please visit: https://wercs.helpdocsonline.com/type-b-rules-phrase-value-symbol-based

Type C Rules Multiple Component Based

Type C Rules – Multiple Component-Based

Type C rules utilize the combination of two formulation level components to apply product level attributes (PTXT, PVAL, and GRPH) to selected Subsections. Type C rules use IF/AND/THEN statements to define ratios or percentages between two components.

Creating a Type C Rule

Creating a Type C rule opens a dialog that guides you through defining the rule logic using IF/AND/THEN statements.

Defining Rule Conditions

To configure the input logic:

In the IF section, click the corresponding Filter icons and use the Filtering tool to select two input components.

Select whether the rule is defined by a ratio or percentage .

Defining Rule Outputs

To configure the output logic:

In the THEN section, select an output Format and the Subsection affected by the rule.

To apply the rule to multiple subsections, select the Multiple Subsections checkbox.

Choose a usage type: PTXT – Click Add phrases , select your desired phrases, then click OK . PVAL – Enter a value in the Value field, then click OK . GRPH – Click the [graphic icon] , select a graphic in the dialog, then click Save .

PTXT – Click Add phrases , select your desired phrases, then click OK .

PVAL – Enter a value in the Value field, then click OK .

GRPH – Click the [graphic icon] , select a graphic in the dialog, then click Save .

To add phrases for multiple subsections: Select a subsection from the Select Product Data pop-up. Click Add phrases and repeat for each subsection.

Select a subsection from the Select Product Data pop-up.

Click Add phrases and repeat for each subsection.

To reorder phrases: Right-click a phrase and select Reorder . In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

Right-click a phrase and select Reorder .

In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

Add any relevant comments in the Comments field.

Click Save to create the rule.

When the confirmation message appears, click OK .

For more information, please visit: https://wercs.helpdocsonline.com/type-c-rules-multiple-component-based

Type C Rules Calculation Sql User Defined

Type D Rules – Calculated Output

Type D rules perform calculations or execute custom logic using product- or component-level data. These rules generate a single product-level value (PVAL) and apply it to selected Subsections.

Type D rules support:

Performing complex calculations.

Running user-defined (UD) functions or programs.

Submitting SQL Insert/Delete/Update executions to the database.

Type D rules utilize mathematical functions that reference product or component data to produce a single output value.

Creating a Type D Rule

Creating a Type D rule opens a dialog that enables you to define the rule logic, select inputs and outputs, and test the result.

Defining Rule Inputs and Outputs

To configure the rule:

Select up to four input Subsections (PVAL or CVAL). These are represented in the formula as: w x y z

w

x

y

z

A mathematical equation.

A user-defined (UD) function.

Testing the Rule Logic

To verify your logic:

Click Test to evaluate the syntax and preview the result.

A Message from Webpage Dialog appears with the output.

If you need help with syntax or component references, click the Tips buttons next to the equation or component fields for guidance.

Finalizing the Rule

Enter any relevant comments in the Comments field.

Click Save to create the rule.

A confirmation message appears in a Message from webpage dialog.

For more information, please visit: https://wercs.helpdocsonline.com/type-c-rules-calculation-sql-user-defined

Type E Rules Unnamed Component Based

Type E Rules – Unnamed Component-Based

Use this form to create Type E rules that apply product-level attributes— PTXT , PVAL , and GRPH —based on component-level attributes, enabling you to define logic without identifying a specific component in the IF section.

Creating a Type E Rule

Defining Rule Conditions

To configure the input logic:

In the IF section: Select an input Format from the dropdown. Click the Filter icon and use the Filtering tool to select a Subsection . Select the input component attribute or define a range of attributes.

In the IF section:

Select an input Format from the dropdown.

Click the Filter icon and use the Filtering tool to select a Subsection .

Select the input component attribute or define a range of attributes.

In the AND section: Select the weight parameter , weight , unit (optional), and model for the component.

In the AND section:

Select the weight parameter , weight , unit (optional), and model for the component.

Defining Rule Outputs

To configure the output logic:

In the THEN section: Select an output Format and the Subsection affected by the rule. To apply the rule to multiple subsections, select the Multiple Subsections checkbox.

In the THEN section:

Select an output Format and the Subsection affected by the rule.

To apply the rule to multiple subsections, select the Multiple Subsections checkbox.

Choose a usage type: PTXT – Click Add phrases , select your desired phrases, then click OK . PVAL – Enter a value in the Value field, then click OK . GRPH – Click the [graphic icon] , select a graphic in the dialog, then click Save .

Choose a usage type:

PTXT – Click Add phrases , select your desired phrases, then click OK .

PVAL – Enter a value in the Value field, then click OK .

GRPH – Click the [graphic icon] , select a graphic in the dialog, then click Save .

To add phrases for multiple subsections: Select a subsection from the Select Product Data pop-up. Click Add phrases and repeat for each subsection.

To add phrases for multiple subsections:

Select a subsection from the Select Product Data pop-up.

Click Add phrases and repeat for each subsection.

To reorder phrases: Right-click a phrase and select Reorder . In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

To reorder phrases:

Right-click a phrase and select Reorder .

In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

To control how new data interacts with existing attributes: Select the Replace checkbox to overwrite existing phrases/values. Leave it unselected to append new phrases/values.

To control how new data interacts with existing attributes:

Select the Replace checkbox to overwrite existing phrases/values.

Leave it unselected to append new phrases/values.

Add any relevant comments in the Comments field.

Add any relevant comments in the Comments field.

Click Save to create the rule.

Click Save to create the rule.

When the confirmation message appears, click OK .

When the confirmation message appears, click OK .

For more information, please visit: https://wercs.helpdocsonline.com/type-e-rules-unnamed-component-based

Type F Rules Regulatory Tracking Based

Type F Rules – Regulatory Tracking Based

Type F rules utilize component level data and regulatory list membership to apply product level attributes (PTXT, PVAL, and GRPH) to selected Subsections. This rule type determines whether components meet (or do not meet) the given percentage criteria or compliance value associated with a regulation.

Creating a Type F Rule

Creating a Type F rule opens a dialog that guides you through defining the rule logic using IF/AND/THEN statements.

Defining Rule Conditions

To configure the input logic:

In the IF section:

Select an input Format from the dropdown.

Defining Rule Outputs

To configure the output logic:

In the THEN section:

Select an output Format and the Subsection affected by the rule.

Choose a usage type: PTXT – Click Add phrases , select your desired phrases, then click OK . PVAL – Enter a value in the Value field, then click OK . GRPH – Click the Graphic icon, select a graphic in the dialog, then click Save .

Choose a usage type:

PTXT – Click Add phrases , select your desired phrases, then click OK .

PVAL – Enter a value in the Value field, then click OK .

GRPH – Click the Graphic icon, select a graphic in the dialog, then click Save .

To add phrases for multiple subsections: Select a subsection from the Select Product Data pop-up. Click Add phrases and repeat for each subsection.

To add phrases for multiple subsections:

Select a subsection from the Select Product Data pop-up.

Click Add phrases and repeat for each subsection.

To reorder phrases: Right-click a phrase and select Reorder . In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

To reorder phrases:

Right-click a phrase and select Reorder .

In the Reorder Phrases pop-up, drag phrases into the desired order and click Save .

To control how new data interacts with existing attributes: Select the Replace checkbox to overwrite existing phrases/values. Leave it unselected to append new phrases/values.

To control how new data interacts with existing attributes:

Select the Replace checkbox to overwrite existing phrases/values.

Leave it unselected to append new phrases/values.

Add any relevant comments in the Comments field.

Add any relevant comments in the Comments field.

Click Save to create the rule.

Click Save to create the rule.

When the confirmation message appears, click OK .

When the confirmation message appears, click OK .

For more information, please visit: https://wercs.helpdocsonline.com/type-f-rules-regulatory-tracking-based

Type G Rules Formulation Based

Type G Rules – Formulation-Based

Use this form to create Type G rules that apply product-level attributes— PTXT or PVAL —based on formulation-level logic, enabling you to perform calculations or apply phrases when specific component criteria are met.

Type G rules combine IF/THEN statements with mathematical formulas or phrase logic. The IF section evaluates a value range and weight for each component in the formulation. The THEN section outputs either:

A calculated value to FVAL using a formula with X (CVAL) and Y (CVAL) .

Creating a Type G Rule

Creating a Type G rule opens a dialog that guides you through defining the rule logic.

Defining Rule Conditions

To configure the input logic:

Select an input Format from the dropdown.

Click the Filter icon and use the Filtering tool to select a Subsection .

Defining Rule Outputs

To configure the output logic:

In the THEN section, select an output Format from the dropdown.

Select the output Subsection .

Select the subsections to be represented by X and Y .

Select the phrase option.

To control how new data interacts with existing attributes: Select the Replace checkbox to overwrite existing phrases/values. Leave it unselected to append new phrases/values.

Select the Replace checkbox to overwrite existing phrases/values.

Leave it unselected to append new phrases/values.

Add any relevant comments in the Comments field.

Click Save to create the rule.

When the confirmation message appears, click OK .

For more information, please visit: https://wercs.helpdocsonline.com/type-g-rules-formulation-based

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Type H Rules – Custom Programs-Based

Type H rules provide the ability to import data from other modules and external programs to perform tasks that are not possible with other rule types.

They are primarily used to execute silent classification wizards as part of a rule stream.

Non-wizard programs can also be run, as long as the needed file, function, and parameter information is provided, which is usually written by UL developers.

Note – Contact your Customer Service Representative for assistance in setting up Type H rules, especially when using non-wizard programs that require specific file, function, and parameter details.

Note – Contact your Customer Service Representative for assistance in setting up Type H rules, especially when using non-wizard programs that require specific file, function, and parameter details.

Creating a Type H Rule

Creating a Type H rule opens a dialog that allows you to define the rule logic and connect to external assemblies.

Defining Rule Inputs

To configure the input logic:

Select your desired assembly path .

Enter the required class name , method name , and parameter . This information is typically provided by UL.

Click the Check Rule button to validate your inputs.

Defining Rule Outputs

To configure the output logic:

In the THEN section:

Select an output Format from the dropdown.

Click the Filter icon and use the Filtering tool to select a Subsection .

Add any relevant comments in the Comments field.

Add any relevant comments in the Comments field.

Click Save to create the rule.

Click Save to create the rule.

When the confirmation message appears, click OK .

When the confirmation message appears, click OK .

For more information, please visit: https://wercs.helpdocsonline.com/r2ljrzkhtr9aqdetnhsk

Type I Rules 2

Type I Rules

Use this form to create Type I rules that combine logic from multiple rule types into a single rule, enabling you to nest complex conditions using various operators. Type I rules support advanced logic structures and allow for the integration of multiple rule types, making them ideal for scenarios requiring layered decision-making and conditional branching.

Creating a Type I Rule

Main Form

The Type I Rule form includes:

Nodes Menu – Displays all nodes added to the rule.

Preview Section – Shows long-form logic for selected nodes.

Defining Rule Logic

To begin building a Type I rule:

Open the Type I rule creation form.

Use the available tools to nest logic from other rule types (e.g., Type A, B, C, etc.) using AND , OR , and other operators.

Combine multiple conditions and outputs as needed to reflect the desired rule behavior.

Note – Additional guidance for creating Type I rules is available in the Build Complex Login with the Rule I Tool section that follows.

Build Complex Logic with the Rule I Tool

The following tools are available for defining, testing, applying, and configuring rules logic:

For more information, please visit: https://wercs.helpdocsonline.com/type-i-rules-2

Nodes

Defining Rule Logic Using Nodes

Accessing Node Logic

Access node logic from the Type I Rule form.

Viewing and Managing Nodes

Use the Nodes menu to view and manage logic nodes.

When creating a new Type I rule, the first node defaults to the name New Node .

When creating a new Type I rule, the first node defaults to the name New Node .

To view multiple nodes at once: Hold Ctrl and click multiple nodes in the Nodes menu. The form expands to display all selected nodes.

To view multiple nodes at once:

Hold Ctrl and click multiple nodes in the Nodes menu.

The form expands to display all selected nodes.

To view all nodes in the rule: Select the Show All checkbox in the Nodes menu.

To view all nodes in the rule:

Select the Show All checkbox in the Nodes menu.

Expand the Preview section at the bottom of the form to view the long-form logic of selected nodes.

Expand the Preview section at the bottom of the form to view the long-form logic of selected nodes.

Creating Nodes

Click + Add Node under the Nodes menu.

Click + Add Node under the Nodes menu.

The Node menu enters edit mode and adds an empty field to the node list.

The Node menu enters edit mode and adds an empty field to the node list.

Enter a node name in the provided field.

Enter a node name in the provided field.

Click Done to confirm. If no name is entered, Done cannot be selected and the rule cannot be saved or tested.

Click Done to confirm.

If no name is entered, Done cannot be selected and the rule cannot be saved or tested.

If no name is entered, Done cannot be selected and the rule cannot be saved or tested.

The new node appears in the Nodes menu. Re-click + Add Node to add additional nodes.

The new node appears in the Nodes menu. Re-click + Add Node to add additional nodes.

Editing Nodes

Use Edit Mode to rename, reorder, or delete nodes.

Click Edit in the Nodes menu.

Click Edit in the Nodes menu.

The Node menu enters edit mode.

The Node menu enters edit mode.

To reorder nodes, click and drag a node’s associated reorder icon .

To reorder nodes, click and drag a node’s associated reorder icon .

To delete a node, click the node’s associated Delete icon.

To delete a node, click the node’s associated Delete icon.

Saving Changes

Save your rule logic to preserve updates.

Click Save at the top of the Type I Rule form. Rules cannot be saved if required information is missing.

Click Save at the top of the Type I Rule form. Rules cannot be saved if required information is missing.

To save changes as a new rule, click Save As New .

To save changes as a new rule, click Save As New .

For more information, please visit: https://wercs.helpdocsonline.com/nodes

Conditions

Defining Rule Logic Using Conditions

Setting Condition Logic

From the dropdown menu at the top of the Conditions section, select whether All conditions must be met or if Any condition can be met for the node to pass.

Click Add Condition and select a condition type from the dropdown menu.

Reorder conditions by clicking and dragging the reorder icon .

Each condition type is described below..

Enter the Parent for the application setting.

Enter the Key .

Select the setting type: Boolean – True/false String – Text-based Numeric – Numeric value

Boolean – True/false

String – Text-based

Numeric – Numeric value

The input field adjusts based on the selected type.

Select whether the condition is regional or non-regional . If regional: Choose whether the prefix is appended or replaced . Select the applicable GHS region(s) from the fixed menu.

Choose whether the prefix is appended or replaced .

Select the applicable GHS region(s) from the fixed menu.

Enter a valid PVAL data code or click the Select button.

Select an operator (e.g., equals, like, not like). Use % as a wildcard: Condition% – Starts with %Condition% – Contains %Condition – Ends with

Use % as a wildcard: Condition% – Starts with %Condition% – Contains %Condition – Ends with

Condition% – Starts with

%Condition% – Contains

%Condition – Ends with

A static value

Enter the value or click the Select Graphic button.

Optionally, select the Case-sensitive checkbox.

Select whether the condition is regional or non-regional . If regional: Choose whether the prefix is appended or replaced . Select the applicable GHS region(s) .

Choose whether the prefix is appended or replaced .

Select the applicable GHS region(s) .

Enter the associated Format .

Enter a valid PTXT data code or click the Select button.

Select the evaluation type for the phrase(s).

Click Add Text Code and select the phrase(s).

Choose a join-by option for each phrase (e.g., space, underscore, period).

Click the Reorder button to arrange the phrases.

Select whether the condition is regional or non-regional . If regional: Choose whether the prefix is appended or replaced . Select the applicable GHS region(s) .

Choose whether the prefix is appended or replaced .

Select the applicable GHS region(s) .

Enter the associated Format .

Enter a valid PTXT or PVAL data code or click the Select button.

Select whether the data code must exist or not exist .

Enter a valid regulation data code or click the Select button.

Select whether the product must be attached or unattached to the regulation.

Select the evaluation type .

Click Add Category to define the expression.

Formulation Loop

Choose whether the loop applies to: Any component All components A specific component

Any component

All components

A specific component

If Any or All is selected: Optionally enter a model . If left blank, the master model is used.

Criteria for Each Component

Select an operator.

Enter the CAS number value.

Enter a valid CVAL data code or click the Select button.

Select an operator (e.g., equals, like, not like). Options include operators that require the data is "like" or "not like" the defined condition, formatted with the wildcard % symbol. Condition% – Requires that the value starts with the defined condition. %Condition% – Requires that the value contains the defined condition. %Condition – Requires that the value ends with the defined condition.

Condition% – Requires that the value starts with the defined condition.

%Condition% – Requires that the value contains the defined condition.

%Condition – Requires that the value ends with the defined condition.

A static value

Enter the value or dynamic expression.

Optionally, select the Case-sensitive checkbox to check for case sensitivity. If this option is not selected, upper case is always assumed.

Enter the associated Format .

Enter a valid CTXT data code or click the Select button.

Select the evaluation type .

Click Add Text Code and select the phrase(s).

Click the Reorder button to arrange the phrases.

Enter a valid regulation data code or click the Select button.

Select whether the component must be attached or unattached to the regulation.

Enter the associated Format .

Enter a valid FTXT data code or click the Select button.

Select the evaluation type .

Click Add Text Code and select the phrase(s).

Click the Reorder button to arrange the phrases.

Select an operator (e.g., equals, like, not like). Options include operators that require the data is "like" or "not like" the defined condition, formatted with the wildcard % symbol. Condition% – Requires that the value starts with the defined condition. %Condition% – Requires that the value contains the defined condition. %Condition – Requires that the value ends with the defined condition.

Condition% – Requires that the value starts with the defined condition.

%Condition% – Requires that the value contains the defined condition.

%Condition – Requires that the value ends with the defined condition.

A static value.

Enter the associated Format and Subformat .

Select whether the print flag is turned on or off .

Custom Aggregate Methods

Select the Use Custom Aggregate Methods checkbox.

Click the Add Aggregate button.

A variable name (must be formatted as {@Variable}).

Whether the function is a string or calculation .

If a string is selected, enter the joining value for each value in the string.

If calculation is selected, select if the calculation is calculated using addition or multiplication..

Select whether All or Any of the aggregate conditions must be met.

Click Add Condition and select an aggregate-specific condition type. Available options include:

Enter a previously created Aggregate variable. Additional information about creating a variable can be found in the previous section.

Select an operator.

Enter the value to compare.

Select an operator.

Enter the percentage threshold the aggregate must meet to pass the condition.

Select an operator.

Enter the count threshold.

Apply to Components Checkbox

Select the Apply to Components checkbox.

Enter a valid CVAL data code or click the Select button.

Define the expression:

A static value

A calculation. See the Calculations section for more details.

Enter the value, value attached to a dynamic data code, or calculation that defines the expression.

Enter the associated Format .

Enter a valid CTXT data code or click the Select button.

Select if the data code is either appended or replaced by the selected phrases or simply deleted.

Click Select Phrase and reorder as needed.

Enter a valid FVAL data code or click the Select button. Entering a non-valid data code produces an error message when saving.

Define the expression:

A static value

A calculation. See the Calculations section for more details.

Enter the value, value attached to a dynamic data code, or calculation that defines the expression.

Enter the associated Format .

Enter a valid CTXT data code or click the Select button to select a data code. Entering a non-valid data code produces an error message when saving.

Select if the data code is either appended or replaced by the selected phrases or simply deleted.

Click Select Phrase and reorder as needed.

Enter the Model ID to which the item is added.

Enter the associated Format.

Enter the associated Subformat.

Select if the print flag is turned on or off for the selected Format and Subformat.

Adding Condition Groups

Click Add Condition Group .

Condition groups appear within the brackets of the created rule set. Follow the steps in the previous sections to create a condition.

Additional condition groups can also be created within previously created condition groups.

Copying and Pasting Conditions

Click Copy next to the condition(s).

For more information, please visit: https://wercs.helpdocsonline.com/conditions

Actions

Defining Rule Logic Using Actions

The Actions section of a node defines the THEN logic of a Type I rule. You can add, configure, and reorder actions to determine what happens when the rule's conditions are met.

Adding Actions

To define THEN logic for a rule:

Click Add Action .

Exit Rule

Use this action to exit the rule set when this point in the logic is reached.

Click Add Action .

Product Value

Select whether the action is regional or non-regional . If any part of the node is regional, the entire node runs for all selected GHS regions. If regional: Choose whether the regional prefix is appended or replaced for the specified GHS data code. Select the GHS region(s) from the fixed menu in the upper right corner. GHS selections do not persist after saving and closing the rule.

Choose whether the regional prefix is appended or replaced for the specified GHS data code.

Select the GHS region(s) from the fixed menu in the upper right corner. GHS selections do not persist after saving and closing the rule.

Enter a valid PVAL data code or click the Select button to choose one. Invalid data codes trigger an error when saving.

A static value.

A calculation. See the Calculations section for more details.

Enter the value, or value attached to a dynamic data code that defines the expression, or click the Select Graphic button to choose a graphic.

Product Text

Select whether the action is regional or non-regional . If regional: Choose whether the regional prefix is appended or replaced . Select the GHS region(s) from the fixed menu. GHS selections do not persist after saving and closing the rule.

Choose whether the regional prefix is appended or replaced .

Select the GHS region(s) from the fixed menu. GHS selections do not persist after saving and closing the rule.

Enter the associated Format .

Enter a valid PTXT data code or click the Select button to choose one. Invalid data codes trigger an error when saving.

Choose whether the data code is: Appended Replaced Deleted

Appended

Replaced

Deleted

Click the Select Phrase button to choose phrase(s).

Model Item(s)

Print Flag

Select whether the action applies to a single component or every component .

If single: Click the Select Component button. The CAS number and Component ID display in the provided fields.

Click the Select Component button.

The CAS number and Component ID display in the provided fields.

Enter the associated Format .

Enter the associated Subformat .

Choose whether the print flag is turned on or off .

Copying and Pasting Actions

Click Copy to copy the selected action(s).

Navigate to the desired section.

For more information, please visit: https://wercs.helpdocsonline.com/actions

Calculations

Defining Rule Logic Using Calculations

Calculation Expressions

Ensure all data codes have a value before utilizing calculation expressions. A valueless data code is ignored if directly passed into aggregate functions (that is, MIX, MAX, SUM, COALESCE. If a data code has no value, it is ignored in aggregate functions. Expressions like Value with {Data Code} require either a data code on the right-hand side or a string containing one or more data codes wrapped in brackets { } .

The COALESCE function returns the first non-null value from a list.

Without COALESCE 5 + 6 * {DATA CODE} Fails if {DATA CODE} has no numeric value.

Without COALESCE 5 + 6 * {DATA CODE}

Fails if {DATA CODE} has no numeric value.

Fails if {DATA CODE} has no numeric value.

With COALESCE 5 + 6 * COALESCE({DATA CODE}, 1) Uses 1 if {DATA CODE} has no value.

With COALESCE 5 + 6 * COALESCE({DATA CODE}, 1)

Uses 1 if {DATA CODE} has no value.

Uses 1 if {DATA CODE} has no value.

Coalesce can also be alternately formatted with: ??arg for a cleaner looking format. This is the same functionality as the standard coalesce functionality but makes the information on the form easier to read.

Alternate syntax

5 + 6 * {DATA CODE}??1

Same functionality, cleaner format. If the passed in data code has no value, the value 1 is used instead.

Same functionality, cleaner format. If the passed in data code has no value, the value 1 is used instead.

Calculation Variables

Use predefined or custom variables in calculations, especially within formulation loops.

Variables marked with * are used at the product level within apply node calculations or with aggregate type when a formula node is present. If no formula node is present, an error occurs.

Variables marked with * are used at the product level within apply node calculations or with aggregate type when a formula node is present. If no formula node is present, an error occurs.

Component Calculation Expressions

Component values can only be utilized from within a component loop or through aggregate methods (that is, MAX , MIN , SUM . Aggregate methods flatten out (replace values outside the loop) individual component values.

Using Aggregate Methods

Use SUM , MIN , or MAX to flatten component values across the Master Model.

Use the | operator to specify value types (CVAL or FVAL).

Examples: Both CVAL and FVAL usage types can be utilized by using the | operator, similar to the 'CALC' methods, but only for component values if within an enumeration.

Component SUM using CVALs

SUM({DATA CODE|CVAL}, {DATA CODE 2|CVAL})

Sums the passed in data code CVAL values across all data codes and all Components of the Master Model.

Sums the passed in data code CVAL values across all data codes and all Components of the Master Model.

Component SUM using FVALs

SUM({DATA CODE|FVAL})

Sums the passed in Data code FVAL values across all components of the Master Model.

Sums the passed in Data code FVAL values across all components of the Master Model.

When taking a SUM, MIN, or MAX from within a component-loop, only the current component is utilized (not the whole formulation..

Within Component Loops

When used inside a component loop, aggregate functions apply only to the current component. An aggregate can be performed over only the components that passed the conditions via the @PASSED variable.

Example:

SUM({DATA CODE|CVAL}, {DATA CODE 2|CVAL}) Sums the passed in data code values across currently iterating.

For more information, please visit: https://wercs.helpdocsonline.com/calculations

Testing And Applying Rules

Testing and Applying Rules for Validation and Output

Type I rules can be tested and applied directly from the Rule I form, enabling you to validate logic and view node-level results before committing changes to product records.

Applying or Testing a Rule

To apply or test a Type I rule:

Expand the Apply to GHS Regions menu to select specific GHS regions to apply/test the rule against, if applicable.

Click Apply to apply the rule.

Node Indicators

When a rule is tested or applied, a color indicator appears to the left of each node name in the Nodes menu. These indicators show the result of each node’s logic evaluation:

Green – The node passed.

Red – The node failed.

For more information, please visit: https://wercs.helpdocsonline.com/testing-and-applying-rules

Xml Options

Configuring XML Output Options for Rule Execution

The Rule I tool includes XML options that enable you to export a rule to Excel or overwrite a rule using logic from an Excel file. These features support rule portability and bulk editing.

Accessing XML Options

To open the XML Options dialog:

From the Rule I form, open the Options menu.

Exporting a Rule to Excel

To export the current rule:

Overwriting a Rule from Excel

To overwrite a rule using an Excel file:

In the XML Options pop-up, click Choose File .

Select the Excel file containing the updated rule logic.

For more information, please visit: https://wercs.helpdocsonline.com/xml-options

Coping From A Selected Rule

Copying and Modifying Existing Rules

Use this form to copy and modify existing rules, enabling you to streamline rule creation by building on previously defined logic.

Accessing and Copying a Rule

To copy an existing rule:

From the Rule Writer Main form, navigate to the All Rules form.

Select the rule and click the Copy Rule button.

Enter a new name for the copied rule.

Modifying the Copied Rule

To modify the copied rule:

Review the existing logic in the IF , AND , and THEN sections.

Make any necessary changes to: Input components or parameters. Output formats, subsections, and usage types. Phrases, values, or graphics.

Input components or parameters.

Output formats, subsections, and usage types.

Phrases, values, or graphics.

Update any comments in the Comments field to reflect the changes.

Click Save to finalize the modified rule.

When the confirmation message appears, click OK .

Tip – Use copied rules as templates to maintain consistency across similar logic structures while reducing setup time.

Tip – Use copied rules as templates to maintain consistency across similar logic structures while reducing setup time.

For more information, please visit: https://wercs.helpdocsonline.com/coping-from-a-selected-rule

Rule Groups

Creating and Organizing Rule Groups for Hierarchical Execution

Rule groups allow you to run collections of rules together in a hierarchical order, saving time and effort.

Each rule group contains a unique rule group ID that is auto-generated. The ID is simply a unique identifier and has no bearing on the order that rule groups are run. Rule groups can branch to other groups via one of the following three parameters:

Next on success – Indicates the next rule group that runs when the last rule in the current rule group is completed, regardless of the True/False result of any rule within the current rule group.

Exit on fail – Stop running all rules in the current group as soon as one of the rules within the current rule group does not produce a TRUE condition.

Next on Fail – Indicates the next rule group that runs when a rule within the current group produces a FALSE condition.

Creating a Rule Group

To create a new rule group:

Navigate to the Rule Writer Main form.

From the Groups section, click the Add Rule Group button.

Enter a name and description for the rule group.

Select the Stop on first false checkbox if you want to stop running the rules in the group as soon as one of the rules does not produce a TRUE condition.

You can select the group that runs after the first FALSE and/or the group to run after the group has finished running by clicking the appropriate buttons to the right of the Next group first false and Next group last Rule fields.

A similar window opens, displaying all the rules in your selected group. You can print this list by clicking the (Print) link.

Adding Rules to a Group

To add rules to a rule group:

Open the desired rule group from the Rule Groups section.

In the Reorder Webpage Dialog , click and drag your rules into your desired order tefine the rule’s position within the group. Add any conditional logic and any conditional logic (for example, run on success, run on failure).

In the Reorder Webpage Dialog , click and drag your rules into your desired order tefine the rule’s position within the group. Add any conditional logic and any conditional logic (for example, run on success, run on failure).

Click Save to finalize the rule placement.

Organizing Execution Hierarchy

To organize rule execution:

Use the Execution Order field to define the sequence in which rules run.

Use Next on Success and Next on Failure options to control branching behavior.

Group related rules together to simplify maintenance and improve readability.

Use Exit Group actions within rules to skip remaining rules in a group when conditions are met.

Managing Rule Groups

To manage existing rule groups:

Navigate to the Rule Groups form.

Select a rule group to view or edit.

Use the available options to: Rename or delete the group. Reorder rules within the group. Update rule conditions or branching logic.

Rename or delete the group.

Reorder rules within the group.

Update rule conditions or branching logic.

Click Save to apply changes.

Tip – Organizing rules into groups helps ensure consistent execution logic and simplifies troubleshooting during rule stream validation.

Tip – Organizing rules into groups helps ensure consistent execution logic and simplifies troubleshooting during rule stream validation.

For more information, please visit: https://wercs.helpdocsonline.com/rule-groups

Rule Streams

Building and Comparing Rule Streams for Sequential Execution

Use this form to create and compare rule streams, enabling you to organize rule groups into a linear execution flow and evaluate differences between streams for consistency and reuse.

Note – Rule streams are linear and cannot support linked rule groups. If a group within a stream is linked to another group, the link does not apply within the stream. A single rule group can be added to multiple streams.

Note – Rule streams are linear and cannot support linked rule groups. If a group within a stream is linked to another group, the link does not apply within the stream. A single rule group can be added to multiple streams.

Creating Rule Streams

To create a new rule stream:

From the Rule Writer Main form , select Rule Stream Members from the navigation menu.

Enter a stream name in the Name field.

Select the Active checkbox if you want the stream to be active.

Enter any relevant comments in the Comments field.

Adding Groups to Rule Streams

To add rule groups to a stream:

Select your desired rule stream.

In the Add Rule Group to Stream dialog: Click the Filter icon and use the Filtering tool to select a rule group. Review the rules within the selected group at the bottom of the form.

Click the Filter icon and use the Filtering tool to select a rule group.

Review the rules within the selected group at the bottom of the form.

Comparing Rule Streams

To compare two rule streams:

From the Rule Writer Main form , select Compare Streams from the navigation menu.

In the Comparison form (Compare option is selected by default): Click the Stream Selection buttons to choose two rule streams. The list of rule groups within each stream appears.

Click the Stream Selection buttons to choose two rule streams.

The list of rule groups within each stream appears.

To export the comparison, click Export to Excel to download the comparison results.

To overwrite all rule groups in one stream: Click Overwrite to replace all groups in Rule Stream 2 with those from Rule Stream 1 . Confirm the action by clicking OK in the confirmation message. This is a permanent action and cannot be undone.

Click Overwrite to replace all groups in Rule Stream 2 with those from Rule Stream 1 .

Confirm the action by clicking OK in the confirmation message. This is a permanent action and cannot be undone.

Select the Copy option.

Check the boxes for the specific rule groups you want to copy from Rule Stream 1 to Rule Stream 2 .

For more information, please visit: https://wercs.helpdocsonline.com/rule-streams

Applying Rules Groups And Streams

Applying Rules, Groups, or Streams to Products

Apply rules, groups, or streams to product records using the Rule Writer form, enabling you to automate updates and generate reports across selected product groups.

Accessing the Rule Writer

Applying Rules, Groups, or Streams

Use the Apply Rules Webpage Dialog to select and apply rule logic to product groups.

Select a rule, group, or stream: Click the Select button next to the desired rule. Use the Filtering tool to narrow your selection. To select all rules, click Select All Rules .

Select a rule, group, or stream:

Click the Select button next to the desired rule.

Use the Filtering tool to narrow your selection.

To select all rules, click Select All Rules .

To switch between groups and streams, click Toggle .

To switch between groups and streams, click Toggle .

Select a product group: Click the Select button next to the desired product group. To select all products, click Select All Products .

Select a product group:

Click the Select button next to the desired product group.

To select all products, click Select All Products .

Choose your desired options: Send to job queue – Sends the rule process to the Job Queue. Update revision date/number – Updates the revision number and date for affected product groups. Email Rule Report – Emails the rule report after processing. Apply to GHS Regions – Applies the rule to selected GHS regions, replacing or appending prefixes from GHSENGINE settings. (Disabled for regional rule streams.) Skip Report Generation (when submitted as job) – Prevents report generation if submitted to the Job Queue.

Choose your desired options:

Send to job queue – Sends the rule process to the Job Queue.

Update revision date/number – Updates the revision number and date for affected product groups.

Email Rule Report – Emails the rule report after processing.

Apply to GHS Regions – Applies the rule to selected GHS regions, replacing or appending prefixes from GHSENGINE settings. (Disabled for regional rule streams.)

Skip Report Generation (when submitted as job) – Prevents report generation if submitted to the Job Queue.

If you select Apply to GHS Regions , choose your desired GHS region.

If you select Apply to GHS Regions , choose your desired GHS region.

To preview the result before applying: Click Preview. The Rule View Webpage Dialog opens. If the rule chain contains a loop, an error message appears.

To preview the result before applying:

Click Preview. The Rule View Webpage Dialog opens.

If the rule chain contains a loop, an error message appears.

To print or export the preview: Click the Print link to print. Click Export to download the preview.

To print or export the preview:

Click the Print link to print.

Click Export to download the preview.

After selecting all options, click Apply .

After selecting all options, click Apply .

A Message from webpage dialog opens, displaying the result. Click OK . If the rule chain contains a loop, an error message appears.

A Message from webpage dialog opens, displaying the result. Click OK . If the rule chain contains a loop, an error message appears.

For more information, please visit: https://wercs.helpdocsonline.com/applying-rules-groups-and-streams

Rule Writer Additional Tools

Using Advanced Tools for Subsection Tracking

The Rule Writer enables you to access advanced tools for tracking subsection usage, supporting deeper analysis and regulatory workflows. You can view all the groups where a rule is being utilized, and also search Formats, Subformats, and Sections by specific parameters to view where a particular Subsection is used. This information can then be printed and/or exported and used for reporting purposes and data management.

Accessing Advanced Tools

Tracking Subsection Usage

Use the Subsection/Section Where Used Dialog to view rule usage across groups and track where specific subsections are used.

On the Rule Writer Main form, click Subsection/section where used .

On the Rule Writer Main form, click Subsection/section where used .

The Subsection/section where used Webpage Dialog opens with the Rule Group tab selected.

The Subsection/section where used Webpage Dialog opens with the Rule Group tab selected.

Click the Select button and choose a rule.

Click the Select button and choose a rule.

Use the Subsection/section where used tab to search for formats, subformats, and sections where a subsection is used.

Click the Subsection/section where used tab.

Click the Subsection/section where used tab.

Use the Extended Uses tab to view a subsection’s extended usage across categories.

Click Extended Uses . The Extended Uses form opens.

Click Extended Uses . The Extended Uses form opens.

Click the Select button to the right of the Select a Subsection field.

Click the Select button to the right of the Select a Subsection field.

To view more details about a category, click the Details button.

To view more details about a category, click the Details button.

Viewing Custom Categories

Use the Custom Categories tab to view subsections that meet custom category requirements.

To create a new category, click Add New . A New Category form opens.

To create a new category, click Add New . A New Category form opens.

Enter a relevant name and description.

Enter a relevant name and description.

Select data code(s) by clicking the Select button.

Select data code(s) by clicking the Select button.

Selected data codes appear in the SubFormat section.

Selected data codes appear in the SubFormat section.

For more information, please visit: https://wercs.helpdocsonline.com/rule-writer-additional-tools

Sara

Welcome to SARA

SARA is a tool for meeting the reporting requirements regulated by the Superfund Amendments and Reauthorization Act (SARA). Integrated with the WERCS Studio DTE Inventory Interface, it connects your inventory management system to chemical formulations, enabling compliance with SARA regulations 311, 312 (Tier II), and 313. The module also supports EPS's Tier2 Submit program by generating compatible import files.

With SARA, you can:

Manage your locations and the level at which you track your inventory

Report your inventory against SARA regulations 311, 312, and 313

View additional reports for further data analysis

Key Functional Areas

Location and Inventory Management – Define tracking levels and manage inventory across multiple locations.

Regulatory Reporting – Generate reports to meet SARA 311, 312, and 313 requirements.

Data Analysis Reports – Access supplemental reports for deeper insight into inventory and compliance data.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/sara

Accessing Sara

Accessing SARA

This topic provides a brief overview of SARA, including how to access it from WERCS Studio and a summary of its functional areas.

Module Access

The SARA Main form is broken out into four areas:

Location Tree – Maintain the level at which you track your inventory.

Navigational Menus – Access additional tools in SARA.

Location Details – View details of your selected location.

Inventory – View the inventory for your selected location.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-sara

Configuration Requirements

Setting Up LOLI Mappings and Inventory Data for SARA Compliance

This topic outlines the configuration and data requirements necessary to run the SARA module. Additional information about mapping regulations can be found in the following topics in the RegLoader / Browser module:

Map ChemADVISOR Regulations to WERCS Studio Subsections

Create and Apply Data Masks for Regulatory Loads

LOLI Requirements

To enable SARA compliance, specific LOLI regulations must be mapped and masked appropriately.

Additional Requirements

Running the SARA module also requires the following configurations:

CAS-level formulations must be present in WERCS Studio.

CAS-level formulations must be present in WERCS Studio.

Product data must include: Physical State – Must be SOLID , LIQUID , or GAS . FRMLA: Substance Type – Must be PURE or MIXTURE . Gravity: Specific Gravity – Used to convert Barrels, Gallons, and Drums to Pounds. If gravity is not specified, a default of 1 is used. Required only if inventory data is supplied in units other than pounds. Conversion ratios: Gallons Ratio = 8.3216 Barrels Ratio = 8.3216 × 42 Drums Ratio = 8.3216 × 55 Pounds Ratio = ratio × amount × gravity

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Gravity: Specific Gravity – Used to convert Barrels, Gallons, and Drums to Pounds. If gravity is not specified, a default of 1 is used. Required only if inventory data is supplied in units other than pounds. Conversion ratios: Gallons Ratio = 8.3216 Barrels Ratio = 8.3216 × 42 Drums Ratio = 8.3216 × 55 Pounds Ratio = ratio × amount × gravity

Gravity: Specific Gravity – Used to convert Barrels, Gallons, and Drums to Pounds. If gravity is not specified, a default of 1 is used. Required only if inventory data is supplied in units other than pounds.

Conversion ratios:

Gallons Ratio = 8.3216

Barrels Ratio = 8.3216 × 42

Drums Ratio = 8.3216 × 55

Pounds Ratio = ratio × amount × gravity

SARA Classification If using the GHS Wizard to classify for OSHA, rules are available to automate this data capture. Supported classifications include: SARA0001 = Acute SARA0002 = Chronic Hazard SARA003 = Fire Hazard SARA004 = Sudden Release of Pressure SARA005 = Reactive Hazard SARA006 = Extremely Hazardous

SARA Classification If using the GHS Wizard to classify for OSHA, rules are available to automate this data capture. Supported classifications include:

SARA0001 = Acute

SARA0002 = Chronic Hazard

SARA003 = Fire Hazard

SARA004 = Sudden Release of Pressure

SARA005 = Reactive Hazard

SARA006 = Extremely Hazardous

Inventory must be loaded either through data conversion or entered manually using the SARA Module. For 313 reporting, inventory must be identified as: Manufactured Processed Otherwise Used

Inventory must be loaded either through data conversion or entered manually using the SARA Module. For 313 reporting, inventory must be identified as:

Manufactured

Processed

Otherwise Used

Customer history must be built via an Orders interface or through data conversion for 313 reporting.

Customer history must be built via an Orders interface or through data conversion for 313 reporting.

For more information, please visit: https://wercs.helpdocsonline.com/configuration-requirements

Managing The Location Tree

Adding, Editing and Organizing Locations for Inventory Tracking

Adding a Location

To add a location to the location tree:

The SARA Location Webpage Dialog opens with the Family Identification tab selected.

The SARA Location Webpage Dialog opens with the Family Identification tab selected.

Select the Refinery Code checkbox to classify the location as a refinery and optionally assign a refinery code.

Use the Authorized Representative fields to identify the individual responsible for signing the 312 report.

Select the Generate Reports checkbox to designate the location as reportable. Reportable locations generate SARA reports (typically locations with their own mailing address).

Owner/Operator – Operator's contact information.

Emergency Contacts – Contact information for a local person or office that can act as a referral if emergency responders need assistance responding to an accident at the facility.

Parent Facility – Contact information for the parent company (optional).

Local Referral – Contact information for the facility emergency coordinator [only applicable to facilities subject to EPCRA section 302(c) emergency planning information]. .

Tier II – Contact information for the person knowledgeable of the data contained in the Tier II inventory form.

Click Save .

Click Save .

Editing a Location

To edit a previously created location:

The SARA Location Webpage Dialog opens. Follow the steps outlined in the Adding a Location section to update the information.

The SARA Location Webpage Dialog opens. Follow the steps outlined in the Adding a Location section to update the information.

Activating/Inactivating Locations

You can activate or inactivate locations. Active locations are reportable and appear in the location tree. Inactive locations are exempt from reporting and appear grayed out. To activate or inactivate a location:

If the location is Active :

Click the button to select an inactivation date.

The Select Date Webpage Dialog opens.

Select a date from the calendar or click Select Current Date .

If the location is Inactive , c lick Activate .

If the location is Inactive , c lick Activate .

Adjust your Main form view by selecting the appropriate viewing option to show all locations or only active ones.

Adjust your Main form view by selecting the appropriate viewing option to show all locations or only active ones.

Deleting a Location

To delete a location:

Searching Locations

You can search for a location by name or by product. To search for a location:

To search by name: Select Containing Text (default). Enter part or all of the location name. Click Search . The Search Results Webpage Dialog opens. Select your location and click Go To .

To search by name:

Select Containing Text (default).

Enter part or all of the location name.

Click Search .

The Search Results Webpage Dialog opens. Select your location and click Go To .

To search by product: Select Containing Product . Click the button to open the Select Product dialog. Choose your product and click Search .

To search by product:

Select Containing Product .

Click the button to open the Select Product dialog. Choose your product and click Search .

To limit search results to a specific level in the location tree: Click the button to open the Select Location Webpage Dialog . Double-click your desired location level.

To limit search results to a specific level in the location tree:

Click the button to open the Select Location Webpage Dialog .

Double-click your desired location level.

For more information, please visit: https://wercs.helpdocsonline.com/managing-the-location-tree

Managing Inventory

Adding, Editing, Copying, Moving, and Deleting Inventory

This topic explains how to manage inventory records within a location. The inventory area displays the following information:

MSDS/Vendor Number – Product ID of the inventory and the number used to track it.

Product Name – Description of the product.

Start Date / Stop Date – Activity report of the inventory (when it appeared or departed from the location). A blank Stop Date indicates that the same amount of inventory continues at this location indefinitely.

Storage Code – Type of storage present at this location and its condition. This is a concatenation of the EPA-defined storage, pressure, and temperature codes.

Maximum Amount – Greatest amount, in pounds, present at this location on any single day during the reporting period.

Average Amount – Average weight, in pounds, present at this location during the reporting period.

Entry Date – Date when the inventory record was added to the system. This is a display-only field and cannot be updated.

Units – Unit in which the inventory is stored.

Usage Type – Usage type of the inventory (required for 313 reporting only).

To add inventory to a location:

The SARA Inventory Webpage Dialog opens.

The SARA Inventory Webpage Dialog opens.

Select an MSDS/Vendor Number by clicking the button.

Select an MSDS/Vendor Number by clicking the button.

Select a Start Date and/or Stop Date by clicking the appropriate button. The Select Date Webpage Dialog opens. Select your desired date from the calendar or click Select Current Date .

Select a Start Date and/or Stop Date by clicking the appropriate button.

The Select Date Webpage Dialog opens.

Select your desired date from the calendar or click Select Current Date .

Select a valid Container Type , Pressure , and Temperature from the dropdown menus.

Select a valid Container Type , Pressure , and Temperature from the dropdown menus.

Select a Usage Type from the dropdown menu (required for 313 reporting only).

Select a Usage Type from the dropdown menu (required for 313 reporting only).

Enter the Maximum Amount and Average Amount .

Enter the Maximum Amount and Average Amount .

Select your desired Units from the dropdown menu. All inventory is converted to and stored in pounds.

Select your desired Units from the dropdown menu. All inventory is converted to and stored in pounds.

Click Save .

Click Save .

Editing Inventory

To edit previously created inventory:

Select a location (for example, Germany, and select the inventory item you want to edit.

Select a location (for example, Germany, and select the inventory item you want to edit.

Follow the steps in the Adding Inventory section to update the record.

Follow the steps in the Adding Inventory section to update the record.

Copying Inventory

To copy or move inventory to another location:

Deleting Inventory

To delete inventory from a location:

For more information, please visit: https://wercs.helpdocsonline.com/managing-inventory

Reporting

Generating SARA 311, 312, 313, and Custom Reports

This topic explains how to generate SARA reports to meet EPCRA requirements for hazardous chemical storage (Sections 311–312), toxic chemical release inventory (Section 313), and other custom reporting needs. All reports and predefined cover letters are generated as PDFs and emailed to the owner of the selected location. A single report request generates a separate report for each reportable child of the selected location.

To request a 311 report:

The SARA 311 Report Webpage Dialog opens.

In the Location field, click the button to the right, then double-click your desired location from the Select Location Webpage Dialog .

Select the Year and Quarter using the dropdown menus.

Select the Generate Empty Reports checkbox to receive a report for each reportable location, even if there is no reportable data.

Click OK . The requested report is sent to the specified email recipient.

312 Reports

To request a 312 report:

The SARA 312 Report Webpage Dialog opens.

In the Location field, click the button to the right, then double-click your desired location from the Select Location Webpage Dialog .

The default email address for the owner of the selected location appears in the Email Address for Report Distribution field.

To include a date signed on the report, click the button to the right of the Date Signed field, and select a date from the calendar.

Select the Year and Quarter using the dropdown menus.

Select the Generate Empty Reports checkbox to receive a report for each reportable location, even if there is no reportable data.

Select your desired Optional Attachment options. This marks the appropriate box on the report but does not attach any documents.

313 Reports

There are four types of 313 reports available:

Supplier Notification – Notifies customers which products they purchased over the past year that contain 313 toxic chemicals above the de minimis percentage.

Toxic Components – Lists all products that contain 313 toxic components.

Toxic Components Meeting or Exceeding Thresholds – Reports any 313 toxic chemicals that meet or exceed thresholds specified in your settings. See Configuring SARA Settings and Assign Security Roles .

Toxic Components Under All Thresholds – Reports any 313 toxic chemicals under all thresholds specified in your settings. See section 7.1 Settings.

To request a 313 report:

The SARA 313 Report Webpage Dialog opens.

In the Location field, click the button to the right, then double-click your desired location from the Select Location Webpage Dialog .

In the Email Address for Report Distribution field, the default email address for the owner of the selected location appears.

The Report Type defaults to the selected 313 report but can be changed using the dropdown menu.

Select the Year from the dropdown menu.

Select the Generate Empty Reports checkbox to receive a report for each reportable location, even if there is no reportable data.

Select the Consolidated Report checkbox to generate one report with totals from all locations.

Other Reports

SARA offers several additional reports for data analysis and recordkeeping.

Active Inventory Report

Displays all active inventory for the selected location.

To request this report:

The SARA Active Inventory Report Webpage Dialog opens.

Select a location and enter an email recipient.

Select the extent of the report: Location and Below – Includes inventory for the selected location and its children. Location Only – Includes inventory for the selected location only.

Location and Below – Includes inventory for the selected location and its children.

Location Only – Includes inventory for the selected location only.

Archived Report

Allows access to an exact copy of a previously submitted report. Archiving is available only to SARA Administrators. To archive reports, select the Archive checkbox on any report request form. To request an archived report:

The SARA Archived Reports Webpage Dialog opens.

Enter an email recipient and select a report from the dropdown menu.

List of Hazard Classifications by Location

Displays hazard classifications for products by location. To request this report:

The List of Products and Hazard Classifications by Location Webpage Dialog opens.

Select the extent of the report: Location and Below Location Only

Location and Below

Location Only

Select the hazards to include.

List of Products by Location and CAS

Displays products by location and CAS number. To request this report:

The List of Products by Location and CAS# Report Request Webpage Dialog opens.

Select the extent of the report: Location and Below Location Only

Location and Below

Location Only

Select either All CAS# or Selected CAS# Only , then click the button to choose a specific CAS number.

List of Products and NFPA/HMIS Categories by Location

Displays products by location along with NFPA/HMIS categories. To request this report:

The List of Products by Location and CAS# Report Request Webpage Dialog opens.

Select the extent of the report: Location and Below Location Only

Location and Below

Location Only

Select either All Categories or a specific category from the Category dropdown menu.

Select either All Values or a specific value from the Value dropdown menu.

Report Status

Displays the statuses of your report requests. To view report statuses:

For more information, please visit: https://wercs.helpdocsonline.com/reporting

Administration

Configuring SARA Settings and Assign Security Roles

This topic explains how to manage SARA reporting configurations and assign security roles to locations using the Administration menu.

Settings

Use the Settings option to configure your SARA reporting preferences. To access settings:

The SARA Settings Webpage Dialog opens. In the Formulation Settings section, select your reporting method:

Report by Chemical – Uses the formulation defined in Model 001 to determine quantity. The model is expected to contain a single CAS at 100%.

Select your desired SARA 312 (Tier II) reporting method :

EPA Method – Adheres to EPA Tier II Reporting Instructions and Form. Uses the LOLI regulatory database to identify SARA chemicals (Extremely Hazardous Substances and Hazardous Substances), TPQs, and RQs.

OSHA – Assumes any product with an SDS is hazardous and should be reported if it exceeds a selected threshold or RQ. Uses the LOLI database to identify Extremely Hazardous Substances and their TPQs.

Enter the 313 reporting subsection in the 313 Regulation field, then set thresholds (in pounds) for:

Manufactured

Processed

Otherwise Used

After selecting your desired options, click OK .

Administration

Use the Administration option to assign security roles to SARA locations. Roles are defined and assigned through the Security Module. To assign roles:

The List of User Roles and Associated Locations Webpage Dialog opens.

The List of User Roles and Associated Locations Webpage Dialog opens.

To select a role, double-click on a role or right-click on a role and select Edit . The Assign Location to the Role Webpage Dialog opens. Use the following options:

To select a role, double-click on a role or right-click on a role and select Edit . The Assign Location to the Role Webpage Dialog opens. Use the following options:

Add Location to Role – Assign the selected location to the role.

Replace Location for Role – Replace an existing location assignment.

Disable Location Tree for this Role – Prevent the role from accessing the location.

For more information, please visit: https://wercs.helpdocsonline.com/administration

Security Manager

Welcome to Security Manager

Security Manager is a tool for managing the WERCS Studio utilization of Role-Based Control and Discretionary Access Control. The application is controlled by one or more Administrator(s) who are responsible for the creation and management of the Users, Roles, and Categories of each module.

With Security Manager, you can:

Implement and configure form-by-form access

Restrict the authority to make changes to a product for a particular role

Restrict the ability to view/print documents by Format, Subformat, Component, Subsection, and Product Group

Key functional areas

Form Access Configuration – Enable or restrict access to specific forms based on user roles.

Role-Based Restrictions – Limit product modification capabilities by role.

Document Access Control – Restrict viewing and printing permissions by Format, Subformat, Component, Subsection, and Product Group.

User and Role Management – Create, edit, and assign roles to users, including copying permissions from existing roles.

Access Monitoring – Review and manage user permissions and role assignments across modules.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/security-manager

Accessing Security Manager

Accessing Security Manager

This section gives a brief overview of Security Manager, including how to access it from WERCS Studio and a summary of the available options.

Module access

Security Manager main format

The main format of Security Manager is broken out into four areas:

Action Buttons – Access the main tools of Security Manager.

Display Category Dropdown menu – Filter the main format view by a particular category.

Display Rights Dropdown menu – Filter the main format to any category that is listed under a particular right. This filter should always be set to All when editing.

Main Area – The currently selected editable category.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-security-manager

Managing Users Roles Rights Access Controls

Managing users, roles, rights, and access controls

The Security Manager module allows you to create and manage Users , Roles , Rights , and Categories .

Managing users and roles

The Security Manager module allows you to create and manage Users , Roles , Rights , and Categories

To manage users and roles:

The Users and Roles form opens. You can search for specific users or roles by typing in any of the available fields:

Managing roles

To manage roles:

In the Users and roles form, click All Roles.

In the Roles popup, click Add New.

Creating a new role

To create a new role:

Select New Role

Enter the role name into the Role Name field.

Creating a new role from an existing role

Select New Role From Existing Role.

Choose the existing role from the dropdown that displays the existing role names.

Enter a name for the new role into the Role Name field.

Click Save.

Managing users

Each user is assigned to one role within Studio.

To create a new user:

In the Security Manager main form, click Add New.

The Add User dialog appears. Enter the required fields: First Name – User’s first name. Last Name – User’s last name. User Name – User's login name (for example, PRAIMI). Phone - User's phone number. Domain Name - Name of the domain to assign the user to. Email Address – User’s email address. Password – User's login password. Confirm Password – Re-enter the password to confirm. Security Role - Select the security role to assign to the user. Out of Office - ULSC User - Application Roles - Limit access to Studio only , WebViewer only , or both . Wercs Studio Web - Select the checkbox if the user has access to the Wercs Studio Web; clear it if they don't. Wercs Web Viewer - Select the checkbox if the user has access to the Wercs Studio Web Viewer; clear it if they don't. Deactivate User - Activate or deactivate a user record. Select the checkbox to deactivate a user record, or leave it cleared for an active user (default).

The Add User dialog appears. Enter the required fields:

First Name – User’s first name.

Last Name – User’s last name.

User Name – User's login name (for example, PRAIMI).

Phone - User's phone number.

Domain Name - Name of the domain to assign the user to.

Email Address – User’s email address.

Password – User's login password.

Confirm Password – Re-enter the password to confirm.

Security Role - Select the security role to assign to the user.

Out of Office -

ULSC User -

Application Roles - Limit access to Studio only , WebViewer only , or both . Wercs Studio Web - Select the checkbox if the user has access to the Wercs Studio Web; clear it if they don't. Wercs Web Viewer - Select the checkbox if the user has access to the Wercs Studio Web Viewer; clear it if they don't.

Wercs Studio Web - Select the checkbox if the user has access to the Wercs Studio Web; clear it if they don't.

Wercs Web Viewer - Select the checkbox if the user has access to the Wercs Studio Web Viewer; clear it if they don't.

Deactivate User - Activate or deactivate a user record. Select the checkbox to deactivate a user record, or leave it cleared for an active user (default).

Click the button to the right of each of the Default fields to select defaults for this user.

Click the button to the right of each of the Default fields to select defaults for this user.

Format - Default format ID for the user.

Language - Default language for the user.

Plant - Default ID for the plant to which the user is being assigned.

Click Save.

When the confirmation popup appears, click OK.

Enabling functional administrator

If using Component Management Flow Process, enable FDBA – Functional Administrator.

Adding phrase permissions

If using Phrase Management Flow Process:

Select Phrase Administrator to allow phrase additions

If not a Phrase Administrator, select individual languages the user can access.

For more information, please visit: https://wercs.helpdocsonline.com/managing-users-roles-rights-access-controls

Svt

Welcome to Substance Volume Tracking

Substance Volume Tracking (SVT) is a tool for generating reports to track the quantity of manufactured, purchased, and sold chemical substances. It supports regulatory compliance by enabling detailed tracking across legal entities, query categories, and component functions.

With Substance Volume Tracking, you can:

Set up the Legal Entities, Query Categories, and Component Functions required for generating reports

Specify Exempt Monomers to exclude from reporting

Create and run Queries to generate reports

Key Functional Areas

Entity and Category Setup – Define Legal Entities, Query Categories, and Component Functions to support reporting.

Exempt Monomer Management – Identify and exclude specific monomers from volume tracking reports.

Query Execution – Create and run queries to generate detailed substance volume reports.

Document Version

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Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

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For more information, please visit: https://wercs.helpdocsonline.com/svt

Accessing Substance Volume Tracking

Accessing Substance Volume Tracking

Use Substance Volume Tracking to generate reports to track the quantity of manufactured, purchased, and sold chemical substances.

Module Access

Substance Volume Tracking Main Form

Main Menu – Navigate to the various tools in Substance Volume Tracking.

Main Menu – Navigate to the various tools in Substance Volume Tracking.

Queries – Create, edit, delete, and select queries.

Queries – Create, edit, delete, and select queries.

Report Options – Select the various reporting options.

Report Options – Select the various reporting options.

Run Button – Run the selected report.

Run Button – Run the selected report.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-substance-volume-tracking

Application Figuration

Configuring Legal Entities, Query Categories, Component Functions, Exempt Monomers

Substance Volume Tracking requires the configuration of Legal Entities , Query Categories , Component Functions , and Exempt Monomers to begin generating reports.

Legal Entities

A Legal Entity is defined as an individual, industrial, or commercial organization (including small and medium-sized enterprises), university, a research organization, or partnership that is responsible for reporting on the manufacture, import, or sale of chemical substances. SVT requires at least one Legal Entity to be set up before a report can be run.

To set up a Legal Entity:

Enter information for the following fields: Code – Enter a unique identifier for the Legal Entity (possibly from the ERP system's identifiers for other organizations). Name – Enter the name of the Legal Entity. Address – Click the Edit button to enter an address for the Legal Entity; this address must contain a VAT-registered country.

Code – Enter a unique identifier for the Legal Entity (possibly from the ERP system's identifiers for other organizations).

Name – Enter the name of the Legal Entity.

Address – Click the Edit button to enter an address for the Legal Entity; this address must contain a VAT-registered country.

Select a legal entity type: Description – Enter a description of the legal entity. UUID – Enter their digital entity UUID (Required for ECHA dossier submissions). ECHA APIKEY – Enter their digital entity ECHA APIKEY (Required for ECHA dossier submissions).

Description – Enter a description of the legal entity.

UUID – Enter their digital entity UUID (Required for ECHA dossier submissions).

ECHA APIKEY – Enter their digital entity ECHA APIKEY (Required for ECHA dossier submissions).

Contact your Customer Service Representative if you need additional information on how to request a legal entity UUID, ECHA APIKEY, and Account Username.

Query Categories

Query Categories control reports and manage their associated Component Function(s).

To set up a Query Category:

Category Name – Create a name for the category.

Description – Enter a brief description of the category.

To assign function(s), click the Function Subsection in the Select Subsection pop-up.

Each Component Function assigned to the Query Category's selected subsection contains the component data it processes for report generation.

In the Add/Edit Query Category pop-up, click Save to store the Query Category record.

Component Functions

SVT requires that each component in a formula be assigned a function. The functions are used to determine whether the component (as it is used in the product) needs to be counted toward the total component volume for the current report.

Component Functions are category specific, and a component may have one function assigned for report category A and a different function assigned for report category B.

Assign functions in the PowerAuthor and PowerDesigner modules. See Power Designer/Power Author for additional information.

To configure Component Functions:

In the Add/Edit Component Function pop-up, enter the following: ID — Unique code that automatically increments to the next available ID after the record is saved (not editable). Category – this dropdown menu contains Query categories. Text Code – Select a Text Code from the Select text phrase pop-up. Contact your Customer Service Representative for additional information concerning this configuration. Name – Enter a name for the component function in this field. Purchased/Manufactured/Sold/Consumed – Optional selections that designate transaction types. Description – Enter a description for the component function in this field. Polymer – Optional selection to display on the list component functions grid.

ID — Unique code that automatically increments to the next available ID after the record is saved (not editable).

ID — Unique code that automatically increments to the next available ID after the record is saved (not editable).

Category – this dropdown menu contains Query categories.

Category – this dropdown menu contains Query categories.

Text Code – Select a Text Code from the Select text phrase pop-up. Contact your Customer Service Representative for additional information concerning this configuration.

Text Code – Select a Text Code from the Select text phrase pop-up. Contact your Customer Service Representative for additional information concerning this configuration.

Name – Enter a name for the component function in this field.

Name – Enter a name for the component function in this field.

Purchased/Manufactured/Sold/Consumed – Optional selections that designate transaction types.

Purchased/Manufactured/Sold/Consumed – Optional selections that designate transaction types.

Description – Enter a description for the component function in this field.

Description – Enter a description for the component function in this field.

Polymer – Optional selection to display on the list component functions grid.

Polymer – Optional selection to display on the list component functions grid.

Assign the function to one or more Query Categories using the Assign Categories option.

Define the input parameters and expected output format for the function.

Exempt Monomers

Exempt Monomers are components that are exempt from aggregate quantities, even when they occur in a polymer. SVT uses a formula model to define the relationship between a polymer and its monomers. Polymers are set up as their own product and given a composition in this model. Polymers must be set up as formula models, otherwise overreporting of quantities may occur.

To configure Exempt Monomers:

In the Add/Edit Exempt Monomer pop-up, enter the following: Monomer Name – Enter the name of the monomer. CAS Number – Provide the Chemical Abstracts Service (CAS) number. Exemption Type – Select the type of exemption (e.g., regulatory, usage-based). Justification – Enter a brief explanation or reference for the exemption.

Monomer Name – Enter the name of the monomer.

CAS Number – Provide the Chemical Abstracts Service (CAS) number.

Exemption Type – Select the type of exemption (e.g., regulatory, usage-based).

Justification – Enter a brief explanation or reference for the exemption.

Attach supporting documentation if required.

For more information, please visit: https://wercs.helpdocsonline.com/application-figuration

Svt Queries Reports

Creating, Running, Viewing SVT Reports

After establishing all required SVT configurations, users can create queries, run reports, and view the most recent report in the activity log.

Creating Queries

To begin building a new SVT query:

Add Pop-up Configuration

Use the Add pop-up to define the query's metadata and filtering options:

Enter a Query Name and Description .

Select a Query Category from the dropdown menu.

Configure country filters: Ignore purchases from specific countries : Select all EU Countries – Ignores purchases from all EU countries. Select All – Ignores purchases from all countries. Application Setting: COMMON > EU_COUNTRIES controls which countries are included when using "Select all EU Countries". Include only sales from specific countries : Select All – Includes sales from all countries.

Ignore purchases from specific countries : Select all EU Countries – Ignores purchases from all EU countries. Select All – Ignores purchases from all countries. Application Setting: COMMON > EU_COUNTRIES controls which countries are included when using "Select all EU Countries".

Select all EU Countries – Ignores purchases from all EU countries.

Select All – Ignores purchases from all countries.

Application Setting: COMMON > EU_COUNTRIES controls which countries are included when using "Select all EU Countries".

Include only sales from specific countries : Select All – Includes sales from all countries.

Select All – Includes sales from all countries.

Select Legal Entities to include: Select All – Includes all Legal Entities.

Select All – Includes all Legal Entities.

(Optional) Configure additional options: Aggregate by Legal Entity – Aggregates component volumes across multiple legal entities. Only supports the following column types: CAS Number Component ID LegalEntityID LegalEntityName Quantity/Date (set to All years) Threshold Note: Non-supported column types may cause incorrect reports or errors. Auto create transaction type columns? – Automatically generates columns for Purchased (Imported) and Manufactured substances for each year. Email the query results to – Select the checkbox and enter an email address to send the report to a recipient after processing.

Aggregate by Legal Entity – Aggregates component volumes across multiple legal entities. Only supports the following column types: CAS Number Component ID LegalEntityID LegalEntityName Quantity/Date (set to All years) Threshold Note: Non-supported column types may cause incorrect reports or errors.

Only supports the following column types:

CAS Number

Component ID

LegalEntityID

LegalEntityName

Quantity/Date (set to All years)

Threshold

Note: Non-supported column types may cause incorrect reports or errors.

Auto create transaction type columns? – Automatically generates columns for Purchased (Imported) and Manufactured substances for each year.

Email the query results to – Select the checkbox and enter an email address to send the report to a recipient after processing.

Valid Columns

In the Report Parameters section, designate if the report is Year-based , Quarter- based , or Month-based . Only one selection can be made.

In the Valid columns section, click the Add New button to open the Add/Edit Query Column pop-up.

To add a standard column, select a Column Type from the dropdown menu. Note: Many of these column types require entry of additional criteria. See the instructions that follow the screen cap below. CAS Number Component ID Chemical Name Data Code ShippedFromID ShippedFromCountry ShippedFromState LegalEntityID LegalEntityName ShippedToID ShippedToCountry ShippedToState ShippedFromCustomer ShippedToState

CAS Number

Component ID

Chemical Name

Data Code

ShippedFromID

ShippedFromCountry

ShippedFromState

LegalEntityID

LegalEntityName

ShippedToID

ShippedToCountry

ShippedToState

ShippedFromCustomer

ShippedToState

(Optional) A Column Display Name may appear when a Column Type is selected. Users are encouraged to edit the Display Name.

(Optional) A Column Display Name may appear when a Column Type is selected. Users are encouraged to edit the Display Name.

Data Code Column Type

Use the Data Code column type contains the following options:

To select phrases:

Click the Add phrases button to open the Select Phrase pop-up.

Select phrases by clicking the associated checkbox.

The selected phrase(s) appear on the Phrase Selector pop-up. Click OK .

If Usage Type is CTXT , the associated phrase code(s) appear in a comma-separated list in the Value field.

Enter default text in the Display Name field to show if the data has one of the specified text codes and usage type.

If Usage Type is CVAL , enter a value in the Value field.

Click Add or Add and Close to finish.

Quantity/Date Column Type

Select checkboxes to include any of the following types of substances: Purchased Manufactured Sold Consumed

Purchased

Manufactured

Sold

Consumed

Select a unit from the Display quantities as section.

Specify the year(s) or date range in the Quantity section.

Click Add or Add and Close to finish.

Threshold Column Type

Select checkboxes to include any of the following types of substances: Purchased Manufactured Sold

Purchased

Manufactured

Sold

Select a unit from the Display quantities as section.

In the Threshold section: Select an Operator from the dropdown. Input a Quantity Threshold value. Choose whether to apply the threshold for: Any of or Each of the specified number of years. Select the number of years from the dropdown.

Select an Operator from the dropdown.

Input a Quantity Threshold value.

Choose whether to apply the threshold for: Any of or Each of the specified number of years. Select the number of years from the dropdown.

Any of or Each of the specified number of years.

Select the number of years from the dropdown.

(Optional) Select the Highlight Cell within the following percent range of the threshold checkbox.

Enter a value less than 100% to show *** instead of X when the percentage is reached.

Click Add or Add and Close to finish.

Product Data Column Type

Reordering Query Columns

To change the order of columns in the query output:

The Reorder pop-up opens. Click and drag columns into the desired order.

For more information, please visit: https://wercs.helpdocsonline.com/svt-queries-reports

Svt Reports Running Scheduling

Running, Scheduling and Viewing SVT Reports

SVT reports can be generated from saved queries and customized using various reporting options. Reports can be run manually or scheduled for automated delivery. To utilize a model formulation instead of the master formulation, set SVT > CALCULATION_MODEL application setting to the desired model number.

Running a Report

To run a report based on a saved query:

Navigate to Reporting Tools > BI Publisher > Query Report Viewer .

Select a report definition from the list.

Enter parameters if required.

Click View Report to generate the output.

Alternatively, reports can be run directly from the Reports tab:

Navigate to the Reports tab main form.

After selecting the reporting format, configure the reporting options at the bottom of the Reports Main form: Format/Subformat – Only applies to Data Code columns defined with the CTXT usage type. Click the format selector button to choose. File Name – Enter a name or description for the report. Send results to – Enter one or more email addresses separated by a semicolon (;). This field is required to run the report. Send to job queue – Select this checkbox to process the report in the background. Useful for long-running reports.

Format/Subformat – Only applies to Data Code columns defined with the CTXT usage type. Click the format selector button to choose.

File Name – Enter a name or description for the report.

Send results to – Enter one or more email addresses separated by a semicolon (;). This field is required to run the report.

Send to job queue – Select this checkbox to process the report in the background. Useful for long-running reports.

Click Run to generate the report.

Save As

Use the Save As feature to duplicate a report configuration:

Click Save As .

The following options are copied to the new report: Query category Query columns and column details Countries selected to ignore purchases from Legal entities selected to include Auto create transaction type columns? selection Email address(es) in the Send Reports to field

Query category

Query columns and column details

Countries selected to ignore purchases from

Legal entities selected to include

Auto create transaction type columns? selection

Email address(es) in the Send Reports to field

The Save As pop-up opens.

Enter a name for the new report in the Report Name field.

Click OK .

Scheduling SVT Reports

Reports can be scheduled for automated execution using the JobSet Definitions interface.

To schedule a report:

Navigate to Reporting Tools > BI Publisher > Schedule JobSet Definitions .

Click Add a New Value .

Enter a JobSet Definition Name .

Click Add .

Add jobs/reports in the desired sequence.

Click Save to store the schedule.

Viewing Scheduled Reports

To monitor the status of scheduled reports:

Navigate to PeopleTools > Process Scheduler > Process Monitor .

View the status and history of scheduled report executions.

For more information, please visit: https://wercs.helpdocsonline.com/svt-reports-running-scheduling

Cscl

Reporting Configuration for Japan Chemical Substance Control Law (CSCL)

The SVT module provides the ability to generate reports that support Japan’s Chemical Substance Control Law (CSCL) regulatory reporting requirements. They are are used to track new and existing chemical substances for compliance with Japan’s regulatory requirements. CSCL reports are pre-defined and the format is not editable via SVT.

Configure CSCL Reporting

To configure CSCL reporting:

Create new regulatory tracking lists for each category in the Regulatory Tracking module: General Monitoring Priority

General

Monitoring

Priority

Assign each list to its corresponding Application Setting: SVT > NEW_GENERAL_REGULATION SVT > NEW_MONITORING_REGULATION SVT > PRIORITY_REGULATION

SVT > NEW_GENERAL_REGULATION

SVT > NEW_MONITORING_REGULATION

SVT > PRIORITY_REGULATION

Add components to the regulation list(s).

The CSCL Report Options form provides the following query options:

Start and End Date – Define the reporting period.

Substance Types to include – Select to include General , Priority , and/or Monitoring substances.

CSCL Report Options

Once the regulations have been created and assigned to their respective application settings, you can add components to the regulation list(s).

S tart and End Date – The start and end dates for the report.

Substance Types to include – Select to include General, Priority, and/or Monitoring substances in the report.

See Check Transactions for Regulatory Compliance for additional information on CSCL reports.

Notifier Contact Information

To configure the notifier contact information that is included in each CSCL report:

Select the Administration tab.

Enter all desired Notifier contact information. This data pre-populates in subsequent CSCL reports.

Country Codes

To view the list of country codes used in CSCL reporting:

Select the Country Codes tab.

Use Codes

To manage codes that represent the intended use of a product:

Select the Use Codes tab.

Prefectures

To view the list of Japanese prefectures used in CSCL reports:

Select the Prefectures tab.

For more information, please visit: https://wercs.helpdocsonline.com/cscl

Transaction Monitoring

Check Transactions for Regulatory Compliance

SVT enables you to manually verify whether a transaction is permissible under GTTM using the Check Transaction tool. Follow the steps below to access and use the tool. Additional information about configuring GTTM can be found in GTTM .

Accessing the Check Transaction Tool

Select Check Transactions from the Navigational Menu.

Click Select Product to choose the product involved in the transaction.

Select a Legal Entity from the dropdown menu. If regulations include thresholds (MAXT, MAXY), a legal entity must be specified. See Configuring Legal Entities, Query Categories, Component Functions, Exempt Monomers for more information.

Select a Legal Entity from the dropdown menu. If regulations include thresholds (MAXT, MAXY), a legal entity must be specified. See Configuring Legal Entities, Query Categories, Component Functions, Exempt Monomers for more information.

Enter the total quantity of the product in the Quantity field. All weights are in kilograms.

Enter the total quantity of the product in the Quantity field. All weights are in kilograms.

Choose a State , Country , or Customer from the appropriate dropdown. Only one option can be selected.

Choose a State , Country , or Customer from the appropriate dropdown. Only one option can be selected.

Select a Model from the dropdown menu.

Select a Model from the dropdown menu.

Click Check to run the transaction check.

Click Check to run the transaction check.

Click Reset to clear the form.

Click Reset to clear the form.

Monitoring Transaction Events

Select Events from the Navigational Menu. The Monitor Transaction Events form displays a history of the transaction events.

For more information, please visit: https://wercs.helpdocsonline.com/transaction-monitoring

Gttm

Welcome to Global Trade Transaction Monitor (GTTM)

The Global Trade Transaction Monitor (GTTM) module, which is accessed through Substance Volume Tracking, enables organizations to evaluate product transactions against global trade regulations, helping ensure compliance before shipments occur. GTTM supports proactive and automated checks to prevent regulatory violations and streamline international trade operations.

Using GTTM, you can:

Set up embargos to prohibit specific products or components from being shipped to designated countries, states, or customers.

Designate approved or prohibited items for specific destinations or recipients.

Configure quantity restrictions that block shipments exceeding defined thresholds for certain products or components.

Manually check transactions within Studio to determine if they meet compliance requirements before processing.

Integrate with external systems via the GTTM Web Service to validate transactions programmatically. (Contact your Customer Service Representative for integration details.

Key Functional Areas

This module includes the following functional areas:

Set Up GTTM Regulations and Transaction Rules - Enables you to define embargos, quantity limits, and approval rules for products and components based on destination or customer criteria.

Set Up GTTM Regulations and Transaction Rules - Enables you to define embargos, quantity limits, and approval rules for products and components based on destination or customer criteria.

Manually Check Transactions for Compliance in Studio - Allows you to validate individual transactions directly within Studio before they are finalized or shipped.

Manually Check Transactions for Compliance in Studio - Allows you to validate individual transactions directly within Studio before they are finalized or shipped.

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For more information, please visit: https://wercs.helpdocsonline.com/gttm

New Folder 2

Setting Up GTTM Regulations and Transaction Rules

Configure GTTM by creating regulations and associated settings in the Regulatory Tracking module to establish a set of restrictions or permissions. You can then use GTTM to manually check these regulations and settings and evaluate if a given transaction is permissible.

For more information, please visit: https://wercs.helpdocsonline.com/new-folder-2

Embargos

Configure Embargos for Countries, States, or Customers

Embargos prohibit any product or component from being sent to a specified country, state, or customer. Follow the steps below to configure an embargo using a Type D regulation.

Create the Embargo Regulation

Begin by creating a regulation in the Regulation Manager that defines the embargo parameters.

Select an option from the Transaction Effect dropdown to specify whether a violation Stops the transaction or Warns that a violation is occurring.

Select an option from the Transaction Effect dropdown to specify whether a violation Stops the transaction or Warns that a violation is occurring.

Select the Regulation Complete Flag checkbox.

Select the Regulation Complete Flag checkbox.

Open the Compliance Settings and Add Embargo Criteria

After creating the regulation, access the compliance settings to define embargo details.

Select the regulation.

Select the regulation.

Choose whether the attached items are Allowed or Prohibited for the selected entity.

Choose whether the attached items are Allowed or Prohibited for the selected entity.

For more information, please visit: https://wercs.helpdocsonline.com/embargos

Product Permissions

For more information, please visit: https://wercs.helpdocsonline.com/product-permissions

Component Permissions

For more information, please visit: https://wercs.helpdocsonline.com/component-permissions

Quantity Restrictions

Define Maximum and Minimum Quantity Limits for Transactions

Create the Quantity Restriction Regulation

Start by creating a regulation in the Regulation Manager that defines the quantity limits and trigger behavior.

Create a regulation of Type F . See Configure Embargos for Countries, States, or Customers .

Create a regulation of Type F . See Configure Embargos for Countries, States, or Customers .

Select an option from the Transaction Effect dropdown to specify whether a violation Stops the transaction or Warns the email group that a violation is occurring.

Select an option from the Transaction Effect dropdown to specify whether a violation Stops the transaction or Warns the email group that a violation is occurring.

Select the Regulation Complete Flag checkbox.

Select the Regulation Complete Flag checkbox.

Add Compliance Details

After creating the regulation, define the compliance scope for a country, state, or customer.

On the Regulatory Tracking Main form, s elect the regulation.

On the Regulatory Tracking Main form, s elect the regulation.

Attach products or components

Next, associate the relevant product or component with the regulation.

In the pop-up that opens, attach the desired product or component.

In the pop-up that opens, attach the desired product or component.

Define Quantity Limits

Use the Compliance pop-up to specify the quantity restriction details.

In the Compliance – New pop-up, select one of the following options from the Compliance Type dropdown:

Maximum per Year (MAXY) – Maximum quantity allowed for the calendar year.

Maximum per Transaction (MAXT) – Maximum quantity allowed per transaction.

Minimum per Transaction (MINT) – Minimum quantity required per transaction.

Enter the quantity restriction or trigger percentage in the Numeric Data field.

Enter the quantity restriction or trigger percentage in the Numeric Data field.

For more information, please visit: https://wercs.helpdocsonline.com/quantity-restrictions

Transactions From With Studio

Manually Check Transactions for Compliance in Studio

Run the Check Transaction Tool

An event message appears indicating whether the transaction is permissible or not allowed.

View Transaction History

Select Events from the Navigational Menu. The Monitor Transaction Events form displays a history of the transaction events.

For more information, please visit: https://wercs.helpdocsonline.com/transactions-from-with-studio

Workflow

Welcome to Workflow Manager

Workflow Manager allows you to create and maintain procedures that manage activity within WERCS Studio. It supports task sequencing, role-based assignments, and automation to streamline operational workflows.

With Workflow Manager, you can:

Create a workflow of tasks for a particular user or role

Utilize workflow tasks that are linear and must be completed in a particular order

Create tasks using checkpoints

Utilize workflows for automation

Key Functional Areas

Task Assignment – Create workflows tailored to specific users or roles.

Sequential Task Management – Define linear task sequences that must be completed in order.

Checkpoint Creation – Use checkpoints to structure and monitor task progress.

Workflow Automation – Automate processes to improve efficiency and consistency.

Document Version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/workflow

Accessing Workflow

Accessing Workflow Manager

Use the Workflow module to manage automated processes across WERCS Studio.

Workflow Manager Access

From the Management menu, select Workflow .

Workflow List Main Form

The Workflow List displays all existing workflows configured in WERCS Studio. You can view, edit, or create new workflows from this form.

The main Workflow Manager form is broken out into three areas:

Workflows – A list of predefined workflows.

Workflows – A list of predefined workflows.

Workflow tasks – A list of tasks associated to the selected workflow.

Workflow tasks – A list of tasks associated to the selected workflow.

Additional tools – Additional tools in Workflow Manager.

Additional tools – Additional tools in Workflow Manager.

Common fields include:

WorkflowName – Name of the workflow.

Status – Indicates whether the workflow is active or inactive.

TriggerType – Specifies how the workflow is initiated (for example, manually or on a schedule).

LastRunDate – Date and time the workflow last executed.

NextRunDate – Scheduled date and time for the next execution.

Owner – User responsible for maintaining the workflow.

Available actions:

New – Enables you to create a new workflow.

Edit – Enables you to modify the selected workflow.

Delete – Enables you to remove the selected workflow.

Run Now – Enables you to manually execute the selected workflow.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-workflow

Workflow Creating Tasks

Creating Workflows, Adding Tasks

Use the Workflow Manager to create procedures for managing activity within WERCS Studio.

Creating Workflows

In the Workflow section of the Workflow Manager Main form, click Add New .

In the Workflow section of the Workflow Manager Main form, click Add New .

The Workflow – New Webpage Dialog opens. The system automatically generates a Workflow ID for internal identification.

The Workflow – New Webpage Dialog opens. The system automatically generates a Workflow ID for internal identification.

Enter a relevant description in the Description field.

Enter a relevant description in the Description field.

Select a workflow type from the Workflow Type dropdown. Checkpoint – All predecessor tasks must be closed before the checkpoint task can be closed. Predecessors may be completed in any order. Linear – Tasks must be completed in the order they are associated with the workflow.

Select a workflow type from the Workflow Type dropdown.

Checkpoint – All predecessor tasks must be closed before the checkpoint task can be closed. Predecessors may be completed in any order.

Linear – Tasks must be completed in the order they are associated with the workflow.

In the Initial Task and Final Task fields, click the buttons to the right of each field, and then use the Filtering tool to select an initial task and final task for the workflow.

In the Comments field, enter any additional comments for the workflow.

In the Comments field, enter any additional comments for the workflow.

To activate the workflow, select the Workflow is active checkbox.

To activate the workflow, select the Workflow is active checkbox.

To create the workflow, click Save .

To create the workflow, click Save .

You can create new tasks outside your initial WERCS Studio setup.

On the Workflow Manager Main form, click Tasks .

On the Workflow Manager Main form, click Tasks .

The Task Management Webpage Dialog opens. Click the Add New button.

The Task Management Webpage Dialog opens. Click the Add New button.

Click Add New . The Workflow Task Webpage Dialog opens. The system automatically populates the Task ID .

Click Add New .

The Workflow Task Webpage Dialog opens.

The system automatically populates the Task ID .

To select a Task Code , click the button to the right of the field, and then use the Filtering tool.

Enter a relevant description in the Description text area.

To create the task, click Save .

Adding Tasks to a Workflow

Tasks become workflow members when linked to a workflow. You can create new tasks that are outside your initial WERCS Studio setup. To add tasks to a workflow:

In the Workflow Tasks section of the Workflow Manager Main form, select your workflow, and then click Add New.

In the Workflow Tasks section of the Workflow Manager Main form, select your workflow, and then click Add New.

Select specific options for task behavior.

Select specific options for task behavior.

To enable notifications, select the This Workflow Task uses Electronic Change Notification checkbox, then enter the following: Email body. Email subject. Recipient’s email address.

To enable notifications, select the This Workflow Task uses Electronic Change Notification checkbox, then enter the following:

Email body.

Email subject.

Recipient’s email address.

To run a rule group or stream, click the button immediately to the right of the Rule Group to run when the Workfow is closed, and then use the Filtering tool.

To switch between Rule Group and Rule Stream , click the Toggle button (last button on the right).

To switch between Rule Group and Rule Stream , click the Toggle button (last button on the right).

To add the task to the workflow, click Save .

To add the task to the workflow, click Save .

For more information, please visit: https://wercs.helpdocsonline.com/workflow-creating-tasks

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Managing Products, Adding Workflows

Workflow Manager enables you to associate workflows with products, enforce workflow rules, and manage checkout status.

Managing Products

Products can be associated with multiple workflows. If you attempt to perform a task that violates any of the workflows associated with the product, then you are prevented from taking that action.

On the Workflow Manager Main form, click Products .

The Products Webpage Dialog opens. To select a product, click the button to the right of the Product ID field.

The Select Products Webpage Dialog opens. Use the Filtering tool to select a product.

Managing Checkout Products

Products that are checked out cannot be authorized for publishing.

On the Workflow Manager Main form, click Products .

When the Products Webpage Dialog opens, click Manage checkout products . Products that are checked out cannot be authorized for publishing.

The Manage Checked Out Products Webpage Dialog opens.

To check a product back in, right-click the product and select Check IN .

Adding Workflows to Products

From the Products Webpage Dialog , click Add New .

From the Products Webpage Dialog , click Add New .

The Product Association – New Webpage Dialog opens. To select a workflow, click the button to the right of the Workflow field and use the Filtering tool.

The Product Association – New Webpage Dialog opens. To select a workflow, click the button to the right of the Workflow field and use the Filtering tool.

To create a task chain for the product, select the Create task chain checkbox.

To create a task chain for the product, select the Create task chain checkbox.

To assign a due date:

To assign a due date:

Click the date selection button to the right of the Due Date field. The Select Date Webpage Dialog opens.

Select a date from the calendar, or click Select Current Date .

Enter any relevant comments in the Comments field (optional).

Enter any relevant comments in the Comments field (optional).

To save the association, click Save .

To save the association, click Save .

When prompted, click OK .

When prompted, click OK .

The Products Webpage Dialog refreshes and displays the tasks assigned to the product.

The Products Webpage Dialog refreshes and displays the tasks assigned to the product.

Task Statuses

Each task in a chain has one current status:

Open

Pending

Closed

To manually change the status of a status, right-click the task and select the desired option.

To leave task comments:

Right-click the task and select Comments . The Task Comments Webpage Dialog opens.

Enter your comment in the Comments field.

To save the comment, click Save .

For more information, please visit: https://wercs.helpdocsonline.com/v26r1cgn3y54qfl58dug

Workflow Automation

Workflow Automation

To enable automation, a workflow must be associated with a product. Automated tasks are performed in the Power Author Plus module. The following actions automatically mark the task as Closed :

Set product security

Apply rules

Review Regulatory Matrix

Update revision date and number

Authorize product formulation

Authorize product format for distribution

Publish document to PDF

Delete product

Accessing Workflow Automation

All the following processes start in the Power Author Plus Main form. To access the Power Author Plus Main form:

Open WERCS Studio .

From the Authoring menu, select Power Author .

Set product security

To set product security for a workflow:

In the Power Author Main form, click Products , then select Edit Product .

The Edit Product Webpage Dialog opens. Click Security .

When you click Security , the Edit Product Webpage Dialog displays a series of access rights controls. They enable you to designate what level of access that users assigned the corresponding role have for the selected product. For each role, select one of the following:

No access **-** Users assigned this role have no access rights.

Full access - Users assigned this role have full read/write access rights.

Full access **-** Users assigned this role have read only access rights; they cannot edit records.

Select your product rights for each role, then click Save . Once the action is complete, the workflow task is automatically marked as Closed.

Apply Rules

To apply rules to a workflow:

In the Power Author Main form, click Wizards , then click Apply Rules .

The Apply Rules Webpage Dialog opens.

Select a rule group or single rule.

Click Apply .

Review Regulatory Matrix

To review the regulatory matrix for a workflow:

In the Power Author Main form, click Wizards , then click Regulatory Matrix .

The Regulatory Matrix Webpage Dialog opens.

Select a regulatory category and click Show .

Update Revision Number and Date for a Product Formulation

To update the revision number and date for a product formulation in a workflow:

In the Power Author Main form, click Authoring , then click Product Formulation .

The Product Formulation Webpage Dialog opens.

Click Revision to update the product revision number.

Authorize Product Formulation

To authorize a product formulation in a workflow:

In the Power Author Main form, click Authoring , then click Product Formulation

The Product Formulation Webpage Dialog opens.

Click Authorize .

The workflow task is automatically marked as closed.

Authorize Product Format for Distribution, Publish to PDF

To authorize a product format for distribution:

In the Power Author Main form, click Authoring , then click Publish this document .

The Current Document Webpage Dialog opens.

Select the Authorize Formula and Attributes for publishing checkbox.

The workflow task is automatically marked as Closed.

To publish a product to a PDF, click PDF Publish . The workflow task is automatically marked as Closed.

Delete Product

To delete a product from a workflow:

In the Power Author Main form, click Product , then select Manage Products .

The Manage Products Webpage Dialog opens.

Right-click the product and select Delete Product .

The workflow task is automatically marked as closed.

Workflow Task Permissions

Please note the following about workflow task permissions:

When designing a workflow task, you assign it to a Role or User . If the assigned role or user lacks permission to complete an automated task, a Message from webpage appears indicating an error.

In a linear task chain, if you attempt to perform an automated task out of sequence, a Message from webpage also appears, indicating an error.

For more information, please visit: https://wercs.helpdocsonline.com/workflow-automation

Workflow Analysis

Workflow Analysis Access

Analyzing Workflow Activity

The Workflow Manager enables you to analyze workflow activity.

The Workflow Analysis Webpage Dialog opens with the Reports tab selected. The tab displays a product status summary. To sort the list, select either: Sort by product ID Sort by due date

Sort by product ID

Sort by due date

To Do List

The To Do List In the Workflow Analysis Webpage Dialog displays all workflow tasks assigned to the selected product with a status of Open . Completed workflows (all tasks associated with the workflow have a status of Closed) do not appear. To access it, click To Do List .

Workflow Analysis can also be accessed by selecting Tasks from the My WERCS tab in WERCS Studio .

For more information, please visit: https://wercs.helpdocsonline.com/workflow-analysis

Ul Secure Connect

Welcome to UL Secure Connect

The UL Secure Connect menu provides centralized access to product safety, regulatory, and authoring services across UL platforms. These options enable users to manage product records, request authoring support, and explore specialized services for branded components and industry-specific needs.

ULSC is a powerful and versatile application that allows for the authoring and management of documents and provides a new way of connecting to WERCSmart.

With UL Secure Connect, you can:

Submit product data to WERCSmart.

Order authoring services from WERCS Professional Services (WPS).

Create and upload your own components and attributes to use in product formulations.

Key Functional Areas

This menu includes the following functional areas:

Accessing UL Secure Connect – Opens the UL Secure Connect portal, enabling access to integrated tools and services.

Manage Products and Assessments in WERCSmart – Enables you to maintain product records and regulatory assessments within the WERCSmart system.

Request Authoring Services from WPS – Enables you to initiate requests for authoring support through the WPS platform.

Upload and Manage Branded Components – Enables you to submit and manage branded components for regulatory review and integration.

Explore Additional Industry & Ingredient Services – Enables you to access specialized services tailored to industry-specific regulatory and ingredient needs.

Access Authoring Tools and Reports in WERCS Studio – Enables you to use authoring tools and view reports within the WERCS Studio environment.

Document Version

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For more information, please visit: https://wercs.helpdocsonline.com/ul-secure-connect

Accessing Ul Secure Connect

Accessing UL Secure Connect

Use the UL Secure Connect to access authoring tools, reporting features, and data mapping utilities. These tools enable you to manage product data, generate reports, and maintain alignment between WERCS Studio and WERCSmart.

Module access

For more information, please visit: https://wercs.helpdocsonline.com/accessing-ul-secure-connect

Ulsc Data Management

Welcome to ULSC Data Management

The Data Management module provides tools and interfaces for organizing, editing, and publishing product-related data and documentation. These options enable users to configure documents, manage product records and components, and customize toolbars to support efficient authoring workflows.

With ULSC Data Management, you can:

Create and publish documents.

Utilize reporting tools.

Associate data to products and components.

Key functional areas

This module includes the following functional areas:

Accessing ULSC Data Management – Opens the Data Management interface within UL Secure Connect, enabling access to core document and product management tools.

Setting Up Your Document in the Welcome Dialog – Enables you to configure initial document settings and preferences using the Welcome Dialog.

Working Within the Main Document Interface – Enables you to navigate and utilize the primary workspace for document editing and data entry.

Managing and Editing Product Records – Enables you to create, update, and maintain product records within the system.

Creating and Maintaining Components – Enables you to define and manage reusable components for use in product documentation.

Authoring and Publishing Toolbars – Enables you to customize and deploy toolbars that support authoring and publishing tasks.

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For more information, please visit: https://wercs.helpdocsonline.com/ulsc-data-management

Accessing Ulsc Data Management

Accessing ULSC Data Management

Use ULSC Data Management to author and manage regulatory documents using structured templates and tools. You can access this functionality from multiple entry points within UL Secure Connect and WERCS Studio.

Tool access

ULSC Data Management Welcome form

Language – Select the document language.

Format/Subformat – Select the format and subformat for the document.

Product ID – Select a task type.

Published Templates – View templates already published for an existing product.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-ulsc-data-management

Navigating The Welcome Dialog

For more information, please visit: https://wercs.helpdocsonline.com/navigating-the-welcome-dialog

Navigating The Main Format

For more information, please visit: https://wercs.helpdocsonline.com/navigating-the-main-format

Ulsc Main Panels Doc Canvas

Sections, Document Canvas, Subsection Details panels

Sections panel

Use the Sections panel to navigate between document sections.

Click a section to display its Subsections in the Document Canvas.

Hold Ctrl and click to select multiple sections.

After selecting sections, you return to the Document Canvas with only those sections visible. You can now compare the selected sections across Subformats. To exit comparison mode:

Re-click the template icon.

Unselect the Multiple Templates (Limited editing controls) checkbox.

Click Save .

Document canvas

Click the Gear icon.

Click the Search icon.

Enter the data code in the search field.

To switch to WYSIWYG mode , unselect the Edit Mode checkbox.

Subsection Details panel

Selecting a data element populates the Subsection Details panel with metadata and configuration options.

Top section

Data element name

Author who last edited it

Checkboxes

Data Required – Addresses whether data must be entered for that specific data element. Failure to enter required data may result in an inability to publish that product within the current template or any other template where that data element appears.

Generic – The data element’s data is simultaneously associated with all children of a generic product.

New Line – Adds a line between the selected data element and the next data element. Required

Additional fields

Use the Previous and Next buttons to navigate between data elements.

For more information, please visit: https://wercs.helpdocsonline.com/ulsc-main-panels-doc-canvas

Ulsc Data Mgt Main Form Tasks

Performing tasks in the ULSC Main form PDF preview

To preview your document:

Document validation

Use Document Validation to identify missing phrases, translations, or required data.

The Product Data Validation Report Webpage Dialog opens.

Revision date

Use Revision Date to highlight changes since the last publication.

Select the Revision Date checkbox.

Comparing multiple regional GHS subformats

To compare multiple GHS Subformats:

The Template Selector Webpage Dialog opens.

Click the Multiple Templates (Limited editing controls) checkbox.

Add or remove sections using the appropriate buttons.

To add a section, highlight it, then click the double left arrow button.

To remove a section, highlight it, then click the double right arrow button.

To clear your selected options, click the Clear button.

The Remember these Selections checkbox saves your selections for the next time you access this dialog. Clicking the Clear button does not overwrite your saved preferences unless you have this checkbox selected.

The Remember these Selections checkbox saves your selections for the next time you access this dialog. Clicking the Clear button does not overwrite your saved preferences unless you have this checkbox selected.

Product compare

Use the Product Compare tool to compare data between two products or aliases.

Select two products/aliases.

The number of differences appears to the right of the checkbox.

Red outlines appear to the right of the checkbox.

Assigning phrase attributes

If you have reordered the phrases, you can click the Code column header to reset them back to the original order.

You can also remove the revision marking on your SDS for your selected Subsection by clicking the Override Revision Marks checkbox.

Once you have selected your desired phrase(s) and options, click Save . The phrase(s) now display in the Document Canvass.

Editing phrases

The Edit Phrase Webpage Dialog opens. Edit the phrase and/or translation and click OK .

Click Info to attach a note.

Enter a note in the Free Text field. This note text does not appear on your published document.

Select a Phrase Type : Limited (L) – Prevents automatic updates. Customer (C) – User-provided, updates with sync. WERCS (W) – UL-provided, updates with sync. Limited (L) – Used to flag phrases whose translations should not be updated when performing a Global Resync or Family Sync. Limited can only be applied to the American English translation. Updates must be made manually any time in the future when there are new or additional translations for a limited phrase, Once a phrase is flagged as Limited in American English, it applies to ALL translations. Customer (C) – Provided by the user and are updated when family or global resync is performed. WERCS (W) – Provided by the UL, they update when a family and/or global resync is performed.

Limited (L) – Prevents automatic updates.

Customer (C) – User-provided, updates with sync.

WERCS (W) – UL-provided, updates with sync.

Limited (L) – Used to flag phrases whose translations should not be updated when performing a Global Resync or Family Sync. Limited can only be applied to the American English translation. Updates must be made manually any time in the future when there are new or additional translations for a limited phrase, Once a phrase is flagged as Limited in American English, it applies to ALL translations.

Customer (C) – Provided by the user and are updated when family or global resync is performed.

WERCS (W) – Provided by the UL, they update when a family and/or global resync is performed.

From the Edit Phrase dialog, you can also eliminate duplicate translations of your phrases by clicking the View All button.

To eliminate duplicates, select a translation and click Eliminate duplicates .

Use the Fix Phrase Duplicates Webpage Dialog to manage translations. Select the translations from the Selected Phrases Translation section, then click Remove selected .

Click Save .

Phrase placeholders

Some phrases within WERCS Studio may contain the placeholder .? . The .? placeholder enables you to combine phrases with other phrases and/or values by entering up to ten placeholder values or text, in the middle of a text phrase.

Double-click your phrase to add it to the top section of the screen, then click the Place Holder Values link.

Click Add New to add up to ten placeholders in the Text field(s). You can also select a preexisting phrase for your placeholder by clicking the Select a phrase button.

Assigning value attributes

Values can be text, numeric or alphanumeric, and they cannot be translated.

Assigning graphic attributes

Select an image and click Save .

To upload a new image:

Assigning free text attributes

Free Text attributes apply only to the selected product and appear on the SDS.Free text attributes are designed to be on a 1-to-1 level with your product. Any data entered into a Free Text usage Subsection only applies to the selected product and is not available for use in any other product. This information appears on your SDS.

Repeating datasets

Use Repeating Data Sets (RPDS) to manage complex data in a list or matrix format.

Each RPDS field supports attribute assignment based on its data type. Hovering over a field allows you to:

Delete the field.

Add/view notes.

For more information, please visit: https://wercs.helpdocsonline.com/ulsc-data-mgt-main-form-tasks

Ulsc Data Mgt Products

Managing and Editing Products

Available Tools

Manage products – Manage your various products.

Add product – Create a new product.

Edit product – Edit an existing product.

Product Copy – Copy information from one or all products to another.

Product Aliases – Create and manage product aliases and groups.

Product Notes – Add and view product notes.

Product Groups – Manage product groups.

Related Documents – Maintain a product’s related documents.

All Published Documents – View and maintain all published documents.

Manage Products

Use Manage Products to view all products and their associated attributes.

To view all products and their associated attributes:

Use the Filtering tool to select a product. Attributes associated with the product appear on the right-hand side of the dialog:

Use the Filtering tool to select a product. Attributes associated with the product appear on the right-hand side of the dialog:

Right-click a product to access the following actions. See the sections below for more details:

View Published

Options

Formulation

Attributes

Notes

Add Product

Use Add Product to create a new master product.

To add a master product:

You have the option to manually enter a product ID into the Product ID field. You can also auto-increment a product ID by selecting the Auto-increment product ID checkbox:

You have the option to manually enter a product ID into the Product ID field. You can also auto-increment a product ID by selecting the Auto-increment product ID checkbox:

Select your desired prefix from the Prefix dropdown menu, then click the Get next ID button.

The next available product ID appears in the Product ID field.

Edit Product

Use Edit Product to modify existing products.

To edit a master product:

In the Product tab, edit the Product Name field. The Product ID field cannot be edited.

In the Product tab, edit the Product Name field. The Product ID field cannot be edited.

After you have made your edits, click Save .

After you have made your edits, click Save .

To add your product to another product group: Select the Group tab. Use the Filtering tool to select a group. Click Save .

To add your product to another product group:

Select the Group tab.

Use the Filtering tool to select a group.

Click Save .

Click Formulation to open the Product Formulation Dialog .

Click Formulation to open the Product Formulation Dialog .

Product Copy

To duplicate attributes from one product to another:

Select a From product and a To product using the selection tools.

Select a From product and a To product using the selection tools.

Choose copy options: Copy product formulation – Copy the existing product’s formulation. Quick Copy – Copy all attribute and formulation data from the existing product. This copies related documents owned by the user, not related documents from wizards. Data Copy – Copy only attributes data from the existing product. This copies related documents owned by the user, not related documents from wizards. Delete “To” sections data – Preexisting data from the “To” product is deleted prior to copying data from the “From” product. Add to archive – Add the product to the archive. This process can only be undone in the Administrator module or from the Published Documents dialog.

Choose copy options:

Copy product formulation – Copy the existing product’s formulation.

Quick Copy – Copy all attribute and formulation data from the existing product. This copies related documents owned by the user, not related documents from wizards.

Data Copy – Copy only attributes data from the existing product. This copies related documents owned by the user, not related documents from wizards.

Delete “To” sections data – Preexisting data from the “To” product is deleted prior to copying data from the “From” product.

Add to archive – Add the product to the archive. This process can only be undone in the Administrator module or from the Published Documents dialog.

Click Copy. When the Message from webpag e opens, alerting you that your product copy is complete, click OK .

Click Copy. When the Message from webpag e opens, alerting you that your product copy is complete, click OK .

To copy aliases, click the Alias tab and repeat the above steps.

To copy aliases, click the Alias tab and repeat the above steps.

Product Aliases

Select a product to view its aliases on the right-hand side of the dialog.

Select a product to view its aliases on the right-hand side of the dialog.

To search for a specific alias, click Find Alias:

To search for a specific alias, click Find Alias:

The Find Alias Webpage Dialog opens.

The Find Alias Webpage Dialog opens.

Use the Filtering tool and select your desired product/alias.

Use the Filtering tool and select your desired product/alias.

Click Add New to create an alias. The New Product Alias Webpage Dialog opens.

You can unselect the Auto Increment ID checkbox to select a specific Alias ID, then give your alias a relevant description.

(Optional) Use the Reason and Customer fields for tracking and reporting purposes. Entries in these fields do not appear in the document.

If you create the alias for an incorrect product or if you decide the attributes of the alias better suit a different product, you can reassign the alias to another product. To reassign an alias:

The Assign to a different product Webpage Dialog opens. Use the Filtering tool to select a new product.

Optionally, if you want to clear any attributes previously assigned the alias, select the Clear existing alias-specific data checkbox.

You can enter language names and/or translations for an alias. If a language name or translation is added to a master alias, it is also added to the master product or any of the product's other aliases. To translate an alias into another language:

The Alias Languages Webpage Dialog opens. Click Add New .

Select a language and enter a translation.

Document Queue

You can also access the Document Queue from the Product Aliases dialog.

The Document Queue WebPage Dialog opens. Choose publishing options:

Act on single item – Add one item to the queue for your selected item.

Re-publish authorized published documents – All previously published documents are added to the queue to be republished, as long as they are currently authorized.

Apply base set to item – Each item is published in all Formats, Subformats, etc. as determined by the base set assigned in the Administrator module.

Select queue options:

Plant – Select the plant for the document.

Document Type – Select the document type.

Web availability – Select if you want to publish to the Intranet Viewer, Internet Viewer, Both Viewers, Orders Interface, or make your document Not Available for any viewers (Authorization Value.

Clear RFR after publishing – If you utilize Reason for Revision, this option clears the Reason for Revision Subsection after the product has been published.

Display revision marking since last publish (PDF only) – Highlight revisions made to this document since the last time it was published.

Do not unauthorize previous documents – Maintain multiple authorized versions of the document. If selected, both the current version and previous versions of the document are authorized. If unselected, all previously published documents are unauthorized at the web availability (Authorization Value) level.

Suppress Trade Secret information (Show Chemical Name) – Prevent trade secret information from being printed on an SDS.

Hide Alias – Hide any aliases on the SDS.

Alias Attributes

To manage your alias attributes:

The Manage alias attributes Webpage Dialog opens, Click Add New .

Use the Filtering tool to select a subsection.

See section 6.1.2 for more details.

Product Notes

Tool Access

Main Form

To add internal notes to a product:

Enter your note text in the New Notes field.

Enter your note text in the New Notes field.

Click Save . The note appears in the Notes for product section.

Click Save . The note appears in the Notes for product section.

A note icon appears next to the product in the Manage products dialog, informing you that a note is associated with your product.

A note icon appears next to the product in the Manage products dialog, informing you that a note is associated with your product.

Product Groups

Tool Access

Main Form

To create a product group:

Click Add New to create a group.

Click Add New to create a group.

Enter a Code and Description , then click OK .

Enter a Code and Description , then click OK .

Click Add New in the Products section to add products using the Filtering tool .

Click Add New in the Products section to add products using the Filtering tool .

Product Group Wizard

The Product Group Wizard enables you to add multiple products to a group at the same time.

The Product Group Wizard Webpage Dialog opens, allowing you to search for products to add to your product group by their formulation, Alias ID/name, PTXTs/PVALs, and customer. Search by: Formulation — Click the Search button and select a component. Next, enter the percentage for that component as it exists in the formulation. Alias ID/Name — Enter your desired ID and/or Name, then select an operator from the dropdown menu Text-based attributes — Select the Text option, then click the appropriate buttons to select a Format, Family, and Textcode. Value-based attributes — Select the Value option, then select a data code by clicking the Search button. Next, select an operator and enter your desired value. Customer — Click the Search button and use the Filtering tool to select a customer.

The Product Group Wizard Webpage Dialog opens, allowing you to search for products to add to your product group by their formulation, Alias ID/name, PTXTs/PVALs, and customer. Search by:

Formulation — Click the Search button and select a component. Next, enter the percentage for that component as it exists in the formulation.

Alias ID/Name — Enter your desired ID and/or Name, then select an operator from the dropdown menu

Text-based attributes — Select the Text option, then click the appropriate buttons to select a Format, Family, and Textcode.

Value-based attributes — Select the Value option, then select a data code by clicking the Search button. Next, select an operator and enter your desired value.

Customer — Click the Search button and use the Filtering tool to select a customer.

Once you have selected your desired search criteria, click Search .

Once you have selected your desired search criteria, click Search .

To limit your search results to groups in the Candidate Group Members section:

To limit your search results to groups in the Candidate Group Members section:

Select the Search only in candidates checkbox.

Select the Search only in candidates checkbox.

Select a product and click the single right arrow button to add it to the Candidate Group Members. You can also click the double right arrow button to add all the listed products to the Candidate Group Members.

Select a product and click the single right arrow button to add it to the Candidate Group Members. You can also click the double right arrow button to add all the listed products to the Candidate Group Members.

You can select a group from the Candidate Group Members section and click the single left arrow button to remove it.

You can also click the double left arrow button to remove all the groups from the Candidate Group Members section.

You must create your group by selecting Add all candidates to group from the dropdown menu before performing additional actions.

You must create your group by selecting Add all candidates to group from the dropdown menu before performing additional actions.

Click Execute . When the confirmation message appears, click OK .

Click Execute . When the confirmation message appears, click OK .

Authorization & Revision

You also have the option to update authorization and revision values by clicking the Authorization & revision tab.

Group Authorization

Click Authorize or Unauthorize .

Click Authorize or Unauthorize .

Related Documents

Tool Access

Main Form

The Manage Related Document Webpage Dialog opens.

The Manage Related Document Webpage Dialog opens.

Click Upload File and select a file.

Your file appears in the Selected files section.

Select or create a document type:

Click the document type tool.

Select or create a supplier: Click the supplier tool. Double-click a supplier or click Add New . Enter contact info and click Save .

Select or create a supplier:

Click the supplier tool.

Double-click a supplier or click Add New .

Enter contact info and click Save .

Select a language and enter comments.

Select a language and enter comments.

Click Save .

Click Save .

All Published Documents

Use All Published Documents to manage previously published documents.

Tool Access

Main Form

Use tabs to view documents by format.

Use tabs to view documents by format.

A legend of Authorization Values appears at the bottom.

A legend of Authorization Values appears at the bottom.

Right-click a document to:

View

Email

Print

Archive

Delete

View Notes

To manage multiple documents: Select the Change multiple checkbox to archive and/or change the Authorization Value of multiple documents at once. You do this by selecting the checkboxes next to each of your desired documents. Select documents and choose an action. Click Execute .

To manage multiple documents:

Select the Change multiple checkbox to archive and/or change the Authorization Value of multiple documents at once. You do this by selecting the checkboxes next to each of your desired documents.

Select documents and choose an action.

Click Execute .

Select Custom Fields to view custom fields for your document. For more details about custom fields, see Power Designer Plus .

Select Custom Fields to view custom fields for your document. For more details about custom fields, see Power Designer Plus .

To restore archived documents: Click the Archive tab. Right-click and select Restore .

To restore archived documents:

Click the Archive tab.

Right-click and select Restore .

For more information, please visit: https://wercs.helpdocsonline.com/ulsc-data-mgt-products

Ulsc Data Mgt Components

Creating and Maintaining Components

Manage components – Manage your various components.

Manage components – Manage your various components.

Add component – Create a new component.

Add component – Create a new component.

Component Copy – Copy elements of an existing component to use in a new component.

Component Copy – Copy elements of an existing component to use in a new component.

Update CAS number – Allows you to update an existing component’s CAS number to a different CAS number.

Update CAS number – Allows you to update an existing component’s CAS number to a different CAS number.

Manage Components

Use Manage Components to view all products and their associated attributes.

To view all components and their associated attributes:

Use the Filtering tool to select a component. Attributes associated with the component appear on the right-hand side of the dialog:

Use the Filtering tool to select a component. Attributes associated with the component appear on the right-hand side of the dialog:

Right-click a component to access the following actions. See the sections below for more details:

Name Translations

Promote to Product

Edit Attributes

Edit component

Notes

Related Documents

Delete

Name Translations

Use Name Translations to view all translations, add new translations, edit and delete existing translations, create synonym names, and create new components.

The Component Translation Webpage Dialog opens.

To create a new translation:

Click the Add New button.

Enter a Chemical Name and Trade Secret Name .

(Optional) Select the Apply name change to all occurrences of CAS # checkbox to apply the name change across all components with the same CAS number.

Click Save .

To add synonyms:

The Synonyms Webpage Dialog opens. Enter up to 10 synonym names for the selected language.

Promote to Product

Use Promote to Product to create a new product from your selected component and all of its attributes, using the Component ID as the new Product ID and the Component Name as the new Product Name.

Review the component details.

Click Save .

The new product uses the component's ID and name.

Edit Attribute

To add a new attribute:

Click the Add New button.

Use the Filtering tool to select your desired subsection.

If you select a CTXT option, the Phrase Attributes Webpage Dialog opens. For more details, see Assigning Phrase Attributes in Performing Tasks in the ULSC Main Form .

If you select a CVAL option, the Value Attributes Webpage Dialog opens. For more details, see Assigning Value Attributes in Performing Tasks in the ULSC Main Form .

Edit Component

Use Edit Component to modify basic component data and configure security rights.

Modify the Chemical Name and Trade Secret Name fields.

To assign security rights:

Use the radio buttons to select each Role and Access Type .

Choose from the following access types: No Access – The user does not have visibility of the product and cannot search, view, or select it. In addition, any product or aliases that use a No Access component in their product formulation will also be invisible to the user. This includes product aliases within product groups, as well as the entire product group itself if all products within it contain one or more no access components. Full Access – The user has full visibility and use of the product, as well as aliases and product groups containing the product. Administrators automatically have full access rights. Read Only – The user can view the product, as well as product aliases and product groups containing the product, but they cannot edit any information (for example, add it to product formulations.

No Access – The user does not have visibility of the product and cannot search, view, or select it. In addition, any product or aliases that use a No Access component in their product formulation will also be invisible to the user. This includes product aliases within product groups, as well as the entire product group itself if all products within it contain one or more no access components.

Full Access – The user has full visibility and use of the product, as well as aliases and product groups containing the product. Administrators automatically have full access rights.

Read Only – The user can view the product, as well as product aliases and product groups containing the product, but they cannot edit any information (for example, add it to product formulations.

Click Save .

Notes

Use Notes to add internal comments to a component. Notes are not displayed on datasheets.

To add a note:

Enter your note in the New Notes field.

Click Save . A note icon appears next to the component in the Manage components Webpage Dialog to indicate that a note is present.

Related Documents

Use Related Documents to view and maintain documents associated with a component.

Delete

Use Delete to remove a component from the database.

Component Summary

Use Component Summary to view, print, or export a summary of a selected component.

To print or export a summary, click the appropriate Print or Export button.

Add Component

Use Add Component to create a new component record.

Enter a valid CAS Number , and then click the Get next ID button.

Enter a Chemical Name and Trade Secret Name .

Click Save .

Component Copy

Use Component Copy to duplicate selected data from one component to another.

It takes certain elements of an existing component and uses them in a new component.

These elements include component values and phrases, regulation listings, regulation compliance data, repeating dataset values, repeating dataset phrases, and component notes.

The Component Copy Webpage Dialog opens.

To copy component data:

In the From Component section, select a source component, format, and section.

In the To Component section, select a destination component, format, and section.

Click Copy . The following data types can be copied:

Component values and phrases

Regulation listings and compliance data

Repeating dataset values and phrases

Component notes

Update CAS Number

Use Update CAS Number to modify the CAS number for an existing component.

The Update CAS number Webpage Dialog opens.

To update a CAS number:

Click the selection button.

Use the Filtering tool to select a component.

Enter the new CAS number.

Click Update .

For more information, please visit: https://wercs.helpdocsonline.com/ulsc-data-mgt-components

Ulsc Data Mgt Toolbar Options

Authoring and Publishing Toolbars

The various toolbar options provide you with additional authoring and reporting tools.

Authoring Toolbar

Product Formulation – Create and edit a product’s formulation.

Product Attributes – Manage product attributes.

Publish this document – Manage publishing options.

Product Formulation

Product Formulation enables you to create new formulations, edit existing formulations, and create new components.

To add a component to your formulation:

Click Add New .

In the Select component Webpage Dialog , use the Filtering tool in the Components section to select a component. For additional information about selecting components, see Manage Components in Creating and Maintaining Components .

The Product Formulation section includes:

Remove – Remove the component from the formulation.

Sync Model – This option must be selected.

CAS Number – A short string of text that refers to a chemical substance.

Component ID – An auto-assigned ID that tracks components.

Chemical Name – The name of the component.

Hazardous – Select if the component is hazardous.

Percent – The exact percentage of the component in the parent product.

Percent Range – A percent range of your component in the parent product.

Trade Secret – Select if the component is a trade secret.

Trade Secret Name – Input the name to replace the component if it is a trade secret.

Click Save Formulation once all components are added.

After saving, icons appear for product notes and/or related documents.

To manage print flag settings:

Click Subformats to print .

In the Print Flags Webpage Dialog , select checkboxes to change flags.

Click Save .

Models

Models enable you to work with alternate formulations. To create a new model:

Click Models in the Product Formulation dialog.

In the Model Formulations Webpage Dialog , click Add New .

Enter a Model ID and Model Description .

(Optional) Select the Synchronize with master model (formulation screen) checkbox to sync the new model with the master formulation.

You can also delete existing model data and replace it with a copy of data from another model.:

Select the target model.

Use the dropdown menu to choose a source model.

Click the Copy From button.

Right-clicking a component provides:

Edit Component – See Editing Components section.

Delete Component – Confirm deletion in the pop-up.

Remove Multiple – Select multiple components in the Remove multiple Webpage Dialog , then click Remove selected .

Component Alias Name , Notes , Related Documents

Reorder – If your Plant's Formulation Sort is set to Form Order, reorder components manually in the Reorder Webpage Dialog .

Reorder – If your Plant's Formulation Sort is set to Form Order, reorder components manually in the Reorder Webpage Dialog .

Use Edit Component to modify component data from within a model.

Right-click a component in the Product Formulation dialog and select Edit Component .

Follow the same steps outlined in the Editing Components section.

Use Delete Component to remove a single component from a model.

Right-click a component and select Delete Component .

Use Remove Multiple to remove several components from a formulation at once.

Right-click a component and select Remove Multiple . The Remove multiple Webpage Dialog opens.

To remove multiple components:

Select the components you want to remove.

Click the Remove selected button.

Use Component Alias Name to view alias information for a component. For more information, see Manage Components in Creating and Maintaining Components .

Use Notes to add internal comments to a component, see Manage Components in Creating and Maintaining Components .

Use Related Documents to view and manage documents associated with a component. For more information, see Manage Components in Creating and Maintaining Components .

Use Reorder to manually change the order of components in a formulation. This option is available only if your plant's Formulation Sort setting is set to Form Order . For more information, refer to Administrator .

Click and drag components into your desired order.

Product Attributes

Product Attributes enable you to add attributes to a product.

Tool Access

To access this tool, click Product Attributes from the Authoring toolbar.

Adding Attributes

Click Add New .

In the Select subsection Webpage Dialog , choose a PTXT, PVAL, or GRPH type.

PTXT – Double-click a phrase, then click OK .

PVAL – Click the Value Tab , input your value, then click OK .

Publish this Document

Once all required data is entered, you can publish your document.

Tool Access

To access this tool, click Publish this document from the Authoring toolbar.

Publishing Options

Select from the following options:

Plant – Select the plant for the document.

Web availability – Select if you want to publish to the Intranet Viewer, Internet Viewer, Both Viewers, Orders Interface, or make your document Not Available for any viewers (Authorization Value).

Authorize Formula and Attributes for publishing – Authorize both the formulation and all product attributes. A document cannot be published until both of these authorizations have been made. You also have the option to authorize your product for all Subformats by checking the Apply to all SubFormats checkbox below it.

Clear RFR after publishing – If you utilize Reason for Revision, this option clears the Reason for Revision Subsection after the product has been published.

Do not unauthorize previous documents – Maintain multiple authorized versions of the document. If selected, both the current version and previous versions of the document are authorized. If unselected, all previously published documents become unauthorized at the web availability (Authorization Value) level.

Publishing Tools

View data ownership report – Opens the Preview Data Ownership Report Webpage Dialog . Click Print Report to print.

Format-Specific Publishing — Select your desired publishing options, then click the icon for your preferred format.

List of Published Documents — Opens the List of published documents . For more information, see Creating and Maintaining Components .

Product Toolbar

Add product – Create a new master product.

Add product – Create a new master product.

Related Documents – View and maintain the product’s related documents.

Related Documents – View and maintain the product’s related documents.

Products Notes – Associate any special notes with a product.

Products Notes – Associate any special notes with a product.

Product Aliases – Manage product aliases.

Product Aliases – Manage product aliases.

Aliases with Attributes – Display all of your aliases that contain attributes. To access this tool, click Aliases with Attributes from the Product toolbar. The Aliases with Attributes Webpage Dialog opens.To edit an attribute:

Aliases with Attributes – Display all of your aliases that contain attributes. To access this tool, click Aliases with Attributes from the Product toolbar. The Aliases with Attributes Webpage Dialog opens.To edit an attribute:

Select an alias.

Click Edit to open the Manage alias attributes Webpage Dialog (see section 4.5).

My Toolbar

My Toolbar enables you to create a customizable toolbar with up to ten frequently used tools. To edit:

In the Edit Toolbar Webpage Dialog , select up to ten items to add to your toolbar by clicking the appropriate checkboxes.

Check In/Out Product

Click the icon to open the Assign/Reassign Products Webpage Dialog .

Select a product and user.

For more information, please visit: https://wercs.helpdocsonline.com/ulsc-data-mgt-toolbar-options

Ulsc Reporting

Running ULSC reports

Use the Reporting form to view prepared ULSC labeled reports. You can also run reports to view UPC information in WERCS Studio.

Running Reports

To access and run ULSC-labeled reports:

From the Saved reports dropdown, select a report.

From the Saved reports dropdown, select a report.

To generate the selected report, click Run report . The report appears at the bottom of the form.

To generate the selected report, click Run report . The report appears at the bottom of the form.

To search for a phrase, type it in the field and click Find .

To search for a phrase, type it in the field and click Find .

To view or save the report: Select a format from the dropdown. Click Export , or click Export to Excel to export directly.

To view or save the report:

Select a format from the dropdown.

Click Export , or click Export to Excel to export directly.

For more information, please visit: https://wercs.helpdocsonline.com/ulsc-reporting

Ulsc Review Queue

Reviewing the ULSC queue

Use the Review Queue to review products and components, perform product syncing, and map components and documents. To access, from the UL Secure Connect menu, select Review Queue .

Selecting products for the review queue

To select products to review in the queue:

In the Review Queue, click Product Review Queue .

In the Review Queue, click Product Review Queue .

The Product Review Queue contains the following columns:

WPS ID – Product ID in WERCS Studio.

Product ID – Product identification number.

Source

Status

Remarks

Date Stamp

Action

Selecting components for the review queue

To select components to review in the queue:

In the Review Queue, click Component Review Queue .

In the Review Queue, click Component Review Queue .

The Component Review Queue contains the following columns:

Product ID – Product identification number.

Product Name – Name of product.

Source CAS Numb – Source CAS number associated with the component.

Source Comp

Chemical Name

Mapped CAS

Mapped Comp

Mapped Chemical

UL Ow

Date Stamp

Select Component

Viewing product sync history

Use Product Sync History to view the last time products were synced from WERCSmart to WERCS Studio.

To view product sync history:

In the Review Queue, click Product Sync History .

In the Review Queue, click Product Sync History .

The Has conflict column indicates if a value from another user causes a conflict.

The Has conflict column indicates if a value from another user causes a conflict.

To view a report: Double-click the product. Or select the product and click Edit . The Report Webpage Dialog opens, displaying documents and WERCSmart values.

To view a report:

Double-click the product.

Or select the product and click Edit .

The Report Webpage Dialog opens, displaying documents and WERCSmart values.

To export the report: Click Export . In the explorer window, click Open to view the report.

To export the report:

Click Export .

In the explorer window, click Open to view the report.

Defining alternate phrases by mapping data codes

In the Review Queue, click Management Mappings , and then click Component Mappings.

In the Review Queue, click Management Mappings , and then click Component Mappings.

You can also access this form by selecting Manage Alternate Mappings from the UL Secure Connect menu

You can also access this form by selecting Manage Alternate Mappings from the UL Secure Connect menu

Double-click a mapped phrase to select it.

Double-click a mapped phrase to select it.

To create a new mapping, click Add New . The Alternate Webpage Dialog opens.

To create a new mapping, click Add New . The Alternate Webpage Dialog opens.

Select a Mapped and Alternate phrase by clicking the appropriate buttons. The right-hand section displays the current mapping.

Select a Mapped and Alternate phrase by clicking the appropriate buttons. The right-hand section displays the current mapping.

To add a new alternate phrase: The Manage Alternate Mappings Webpage Dialog opens. Select a mapped phrase. Click Add New .

To add a new alternate phrase: The Manage Alternate Mappings Webpage Dialog opens.

Select a mapped phrase.

Click Add New .

Click the button to open the Select text phrase Webpage Dialog .

Click the button to open the Select text phrase Webpage Dialog .

Select a phrase and click Save .

Select a phrase and click Save .

If the selected phrase is already mapped, a message appears.

If the selected phrase is already mapped, a message appears.

Mapping documents

To create document mappings:

In the Review Queue, click Management Mappings , and then click Document Mappings. The Document Mapping form opens.

In the Review Queue, click Management Mappings , and then click Document Mappings. The Document Mapping form opens.

To edit a mapping:

To edit a mapping:

Select a document.

Click Edit . The Edit Mapping Webpage Dialog opens.

For more information, please visit: https://wercs.helpdocsonline.com/ulsc-review-queue

Other Help

Other WERCS Studio functions

The Other WERCS Studio Functions section contains reference content about specialized utilities that support system operations, data flow, and integration logic. These functions are typically used for backend management, API connectivity, and logic handling across various modules.

Key functional areas

This section includes the following tools:

Detergents Logic - Supports logic specific to detergent-related product processing, ensuring correct handling of regulatory and formulation rules.

Detergents Logic - Supports logic specific to detergent-related product processing, ensuring correct handling of regulatory and formulation rules.

File Manager - Enables you to manage internal files used by Studio processes, including configuration files, data imports, and system-generated outputs.

File Manager - Enables you to manage internal files used by Studio processes, including configuration files, data imports, and system-generated outputs.

Job Queue - Displays and manages queued jobs within Studio, enabling you to monitor processing status and troubleshoot delays or failures.

Job Queue - Displays and manages queued jobs within Studio, enabling you to monitor processing status and troubleshoot delays or failures.

Studio to MYSDS API Connection - Facilitates integration between WERCS Studio and the MYSDS system, enabling automated data exchange and synchronization.

Studio to MYSDS API Connection - Facilitates integration between WERCS Studio and the MYSDS system, enabling automated data exchange and synchronization.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/other-help

Detergents Logic

Welcome to Detergents Logic

Welcome to the Detergents logic reference. The Detergents logic assists with meeting compliance with the EU Regulation 648/2004/EC on Detergents, by generating a proposal for three items: Labeling of contents; an Ingredient Datasheet for Medical Professionals; and an ingredient list for the general public.

With the Detergents logic, you can:

Manage cleaner ingredient characteristics and conversion factors.

Create a table of constituents with percent ranges for labeling of cleaning products.

Create a Medical Ingredient Sheet for cleaning products.

Create a Public Ingredient Sheet for cleaning products.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/detergents-logic

Detergents Logic Set Up

Detergents Logic set up

The detergents logic setup requires reserved formulation models, component ranges, rules, and formatting constructions.

Reserved formulation models

Formulation models must be set up in Power Designer Plus prior to using the detergents logic.

Detergents model post calculation factor

EU Medical Personnel Ingredients Datasheet

Model 997 – EU Medical Personnel Ingredients Datasheet contains the formulation ingredients for display in the Ingredient Datasheet for Medical Personnel as required by the EU Detergents Regulation.

Component ranges

The regulations require that the medical ingredient datasheet list all ingredients, except impurities, present in the marketed product in decreasing order by weight%. The specified ranges are: >=10 %, >=1 - <10%, >=0.1 - <1%, and < 0.1%.

To set the component ranges, select the Subformat that will display the medical ingredients datasheet in Power Designer Plus, then select Component Ranges from the Components menu:

Set the ranges as required by the regulation:

Formatting constructions

The medical ingredients datasheet must be set up in a Subformat as an XCOMP component table. The datasheet can be imported from the standard content Subformats available for Studio, or built in Studio using the standard formatting tools.

The medical ingredients datasheet component table displays the model 997 ingredients with the master component name, INCI name, and EP name as shown:

Procedure

To properly display the model, the XCOMP table formatting requires that the Component Model be specified in the table properties.

To properly display the component name synonyms, the XCOMP table formatting requires that the defaults for the XCOMP specify the phrases for the @SYN where the corresponding chemical name synonyms are maintained. (for example, the defaults in the table properties view above).

It is also recommended you use default phrases clarifying the source of the name shown.

These phrases can be set up in the XCOMP family and applied using the standard multiple-default selection options:

Rules

The Detergents logic relies on D rules that call upon .dll files. The files must be placed on the WERCS Studio server and the rules must be set up in the Rule Writer module. A Customer Support Representative must assist with importing both the rules and associated .dll files.

Loading/managing component name synonyms (INCI and EU Med)

Concerning the Medical Ingredient Sheet for cleaning products, the detergents outputs require that the INCI names and European Pharmacopoeia names (EP names) of each component be loaded to the default display SYN for the component names in model 997. If a particular synonym is not available, the system defaults to show the standard chemical component name.

Load of INCI names to desired SYN

INCI names are available in the following RegLoader/Browser lists:

EU – Inventory of Cosmetic Ingredients Directive (INCI) (76/768/EEC) - Perfume and Aromatic Materials (861)

EU – Inventory of Cosmetic Ingredients Directive (INCI) (76/768/EEC) - Other Ingredients (902)

Procedure

Prior to loading INCI names, you must set the Special code for the language EN to 1 . You do this in the Language Edit form in the Translation Manager module.

To load Chemical synonyms, click the Actions tab in the RegLoader / Browser .

The Load chemical name translations popup opens. From this form, select the desired Name type to load (for example, SYN_9) and the List ID. A load for both the 861 and 902 lists is required.

Next, select the Override ownership checkbox, then click OK to start the load.

Accept the long-running option. When the load completes, A message appears and indicates the number of names appended/updated.

Manage European Pharmacopoeia (EP) names

European Pharmacopoeia names are not available publicly but can be accessed in a proprietary database by subscription only. Therefore, the names cannot be loaded from regulatory data lists. The proprietary database is accessible from the Council of Europe website.

Manage IUPAC names

IUPAC names can also be maintained as synonyms. In the standard delivery system (Golden), IUPAC names are maintained in F_SYN_7; however, this option can be altered by updating the medical ingredient datasheet formatting default in the XCOMP table for the EU Medical Personnel Ingredients Datasheet model (model 997 in standard delivery).

Creation of generic components representing the detergents ingredient categories

You must create components that are used as generic names for the colorant, essential oil, and perfume ingredients. You create them by entering the component names, CAS numbers, and component IDs shown in the following table:

Creation of components representing the detergents ingredient functions

You must create components with the name of each functional group for the Labeling Ingredients Display.You create them by entering the component names, CAS numbers, and component IDs shown in the following table:

For more information, please visit: https://wercs.helpdocsonline.com/detergents-logic-set-up

Applying Detergents Logic

Accessing and applying Detergents Logic

The Detergents Logic consists of a set of D rules that launch small User-Defined (UD) custom programs.

Applying Detergents Logic

To apply detergent logic using the Apply Rules form, you can access it from the following modules:

The Wizards toolbar in Power/Designer/Author Plus or

The Rule Writer module.

To launch the detergents logic operation, from the Apply section, search for the rule group containing EU Detergent Regulations:

For more information, please visit: https://wercs.helpdocsonline.com/applying-detergents-logic

Operation Of Detergents Logic

Run Detergents Logic and generate regulatory outputs

Configuring product level inputs

Product level run control

The detergents logic runs on every product unless it is turned off. The PVAL DETER controls this as follows:

Product level generic indicators for BOM input raw materials

Products associated with a product BOM can also serve the following special functions by a PVAL:

Configuring component level inputs

Component functions are indicated in the CTXT SUBGRP and their conversion factor is indicated in the CVAL DETCF (for conversion of active ingredient % or to report phosphate equivalent to sodium tripolyphosphate).

Component level input SUBGRP

The LOLI source for the SUBGRP CTXT is List 2629, EU - Detergents Regulation (648/2004/EC) - Consumer Labeling Requirements.

Mask ingredients where @4 is like *fragrant allergenic substance* and map to load SUBGRP24 phrase, as a safety net to ensure requirements to name these components individually are fulfilled.

Mask ingredients where @4 is like *cosmetic preservative* and map to load SUBGRP20 phrase, as a safety net to ensure requirements to name these components individually are fulfilled.

The functional class indicators cannot be applied by regulatory data load, but must be assigned as part of their formulation data management process:

Component level input DETCF

The chemical components of a detergent product must have the applicable detergent conversion factor (as DETCF CVAL) if relevant. The rules will populate a model for Detergents Model Post Calculation Factor (model 991 in standard delivery) with each ingredient and will insert the model: PERCENT = Master PERCENT x DETCF. This model serves as an output to review the calculations. These conversion factors must be determined as part of the component data management process. The guidance of AISE notes:

Where it is known that a constituent is supplied at, say, 60% active, then the concentration of the active constituent present in the product should be communicated. Similarly, concentration should refer to anhydrous ingredients and not their hydrates.

Phosphates should be expressed % P multiplied by 4, where P is the phosphorus derived from the inorganic phosphates present in the product. In effect, this convention is equivalent to expressing phosphate content as though it is all present in the form of sodium tripolyphosphate.

Salts of EDTA and NTA should be expressed as the acids EDTA or NTA, as appropriate.

“Polycarboxylates” should be interpreted as referring to homo and co-polymers of acrylic acid and expressed as the sodium salt.

Configuring outputs

The Detergents Logic generates the required compliance outputs for compliance with detergent regulation labeling and information sheet requirements:

Labeling of contents - EU648FN(LST)

Case 1: Listing by functional (subgroup) name at 0.2% threshold

Case 2: Listing by functional (subgroup) name at 0% threshold

The following ingredient functions (subgroups) will be listed by their functional (subgroup) name without concentration ranges, when an ingredient in the subgroup name is present at a concentration >0%:

Case 3: Preservation agents

Ingredients with the subgroup “preservation agents” are each listed individually using the common nomenclature of the regulation on cosmetic products [INCI name] if present at a concentration >0%.

Case 4: Allergenic perfume ingredients

Ingredients with the subgroup “allergenic perfume ingredients” are each listed individually using the nomenclature from Annex III of Regulation (EC) No 1223/2009 on cosmetic products [INCI name] if present at a concentration >0.01%.

Medical Ingredient Data Sheet - Model 997 (XCOMP Table)

An ingredient data sheet to be made available to medical personnel and conforming to the requirements of Annex VII C appears where formatted as an XCOMP table based on model 997, as described in the set-up above.

Public Ingredient Data Sheet - EU648P (LST)

The list of ingredients made available to medical personnel also appears as a simple list of ingredients without reference to the CAS or composition information. This list can be formatted to publish as a document that can be made available on a publicly accessible website, as required by the regulation.

The components should appear with the INCI name, if available. If the INCI name is not available, the EP Name should appear, otherwise the standard chemical name will be used as a default.

Logic:

If there is a text in the SYN named in the ap setting for INCI (e.g. SYN_9), then build the list component item to reference the SYN_INCI name.

If there is no text in the ap setting for INCI, but there is text in the SYN named in the ap setting for EU Pharmacopeia (e.g. SYN_8), then build the list component item to reference the SYN_EP name.

If neither of the settings have text, then build the list component item to reference the SYN_INCI name.

The intent is that if an INCI name is later made available, it will be used. If there is still no INCI name, then the standard chemical name is used by default.

For more information, please visit: https://wercs.helpdocsonline.com/operation-of-detergents-logic

File Manager

Welcome to File Manager

Welcome to the File Manager reference. File Manager is a tool for storing, accessing, and exporting your files.

With File Manager, you can:

Easily access your files.

Easily access your files.

Upload and download files.

Upload and download files.

Hold exported items from Translation Manager and other export options.

Hold exported items from Translation Manager and other export options.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

Contents

Our goal is to give you clear and concise insight into our product. Should you have additional questions, please do not hesitate to contact your customer support representative.

For more information, please visit: https://wercs.helpdocsonline.com/file-manager

Accessing File Manager

Accessing the File Manager

This section gives a brief overview of File Manager, including how to access it from WERCS Studio, and opening folders and files.

File Manager access

From the Settings menu, select File Manager .

This takes you to the File Manager Main form.

File Manager Main form

The File Manager Main form is broken out into two areas:

Folder list (left): Listing of all of your available folders in WERCS Studio.

File list (right): Listing of files in individual folders.

Navigating the Folder List

You can navigate the Folder List to locate subfolders within an individual folder.

Click the folder’s associated icon to open all available subfolders within that folder.

When you open a folder, the icon changes to an open folder icon to indicate that it is open.

For more information, please visit: https://wercs.helpdocsonline.com/accessing-file-manager

Managing Files

Managing files

The core functionality of the File Manager includes uploading and downloading files, accessing previously loaded files, and editing names of the files.

Uploading files

File Manager enables you to upload a file into Studio.

The Upload WebPage Dialog appears. Click Upload file and select your desired file.

Editing name of selected file

The File Manager enables you to edit the name of a previously created file.

To edit a file name, select a folder, select the file you want to rename, and then click the Edit button.

Downloading files

You can also download files from File Manager.

To download files, right-click on your desired file and select a downloading option:

Download Checked Files – Download only the files you selected.

Download Checked Files – Download only the files you selected.

Download Folder – Download an entire folder.

Download Folder – Download an entire folder.

For more information, please visit: https://wercs.helpdocsonline.com/managing-files

Job Queue

Welcome to Job Queue

Welcome to the Job Queue reference. Job Queue is a tool for running data-intense processes in the background of WERCS Studio without interrupting your experience.

With Job Queue, you can:

View current job processes.

Set a job schedule.

View job history.

Document version

This reference is applicable to WERCS Studio versions 6.1.26 – 6.1.28.

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For more information, please visit: https://wercs.helpdocsonline.com/job-queue

Access Job Queue

Accessing Job Queue

This section gives a brief overview of Job Queue, including how to access it from WERCS Studio, and a summary of the options. .

Job Queue access

From the Settings menu, select Job Queue .

Job Queue Main form

The Job Queue Main form is broken out into two areas:

Job Information Tabs (left): This section enables you to navigate to all of features in Job Queue.

Job Information Display (right): This area displays detailed information about your job processes. .

Job Information tabs

Job Queue – Listing of jobs ready to run.

Job Queue – Listing of jobs ready to run.

Scheduled Jobs – Listing of recurring jobs.

Scheduled Jobs – Listing of recurring jobs.

History – Listing of jobs that have previously run.

History – Listing of jobs that have previously run.

Settings – Module settings.

Settings – Module settings.

For more information, please visit: https://wercs.helpdocsonline.com/access-job-queue

Job Queue Core Elements

Job Queue core functionality

The core functionality of the Job Queue module includes managing your job processes, modifying your scheduled job settings, and viewing detailed job history.

Using the Job Queue

The Job Queue tab displays your current job processes.

To view your current job processes, click Job Queue .

Select the job process you want to edit.

To edit the associated job scheduling information, click the Edit button.

The Edit job Webpage Dialog opens. Select a scheduling option, enter your desired parameters, then click Save .

Scheduled jobs

The Scheduled Jobs tab enables you to view details about your previously scheduled jobs..

To view detailed about currently scheduled jobs, click Scheduled jobs .

Select the scheduled job you want to view.

To view the associated job information, right-click and select View details .

The Job Information Webpage Dialog opens. Click the Input Parameter and Report options to view additional information.

Viewing history

The History tab enables you to view jobs that have previously run.

To view your current job processes, click Job Queue .

To view details about a previous job, follow the steps in the Scheduled Jobs section.

Modifying settings

The Settings tab enables you to modify your module settings.

To view modify your module settings, click Settings .

To start or stop the processing service, click Start Service or Stop Service as needed.

To submit a test job for the system, click Submit Test Job .

When you submit a test job, the following message appears.

Click OK to submit the test job.

In the Job History Cleanup Settings section, designate how long to keep files in Studio:

Specify the number of months of history to keep and click Run now .

When the confirmation message appears, click OK .

For more information, please visit: https://wercs.helpdocsonline.com/job-queue-core-elements

Studio To Mysds Api Connection

Studio to MYSDS API Connection

Welcome to the Studio to MYSDS API Connection reference. This reference details the behavior of Studio when it is connected to the MYSDS API.

With the Studio to MYSDS API connection, you can:

Trigger sending documents to the MYSDS API.

Trigger sending documents to the MYSDS API.

Manage the Authorization levels for pushing documents to the API.

Manage the Authorization levels for pushing documents to the API.

View submissions statuses and errors in Studio.

View submissions statuses and errors in Studio.

Document version

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Note: Screen captures may differ from the actual forms found in your WERCS Studio version.

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For more information, please visit: https://wercs.helpdocsonline.com/studio-to-mysds-api-connection

Publishing Triggers

Publishing triggers

A single or multi-publishing of any eligible PDF document automatically triggers pushing of the document(s) from Studio to MYSDS. (See the Eligible Documents section below for information on what documents are considered eligible).

During the push, the Plant Code and API key combination is checked for verification.

If the combination is not valid, the document(s) are not pushed.

Non-triggering actions

The following are examples of actions that do not trigger a push:

A change in authorization level of a document without a re-publish.

A change in authorization level of a document without a re-publish.

A change in the authorization levels listed in the Application Setting: MYSDS > MYSDSAUTHLEV without a republish.

A change in the authorization levels listed in the Application Setting: MYSDS > MYSDSAUTHLEV without a republish.

Eligible documents

While all PDF documents are pushed on a publishing action, only the following documents are successfully sent to MYSDS.

PDF documents only.

PDF documents only.

Documents with the appropriate authorization level(s), as defined in the MYSDS > MYSDSAUTHLEV Application Setting. See Authorization Levels below.

Documents with the appropriate authorization level(s), as defined in the MYSDS > MYSDSAUTHLEV Application Setting. See Authorization Levels below.

Documents with a Format/Subformat and market language combination, as defined in Appendix A . All other combinations return a LocaleNotFound error.

Documents with a Format/Subformat and market language combination, as defined in Appendix A . All other combinations return a LocaleNotFound error.

Documents that have a product with a Product Name length of 300 or fewer characters.

Documents that have a product with a Product Name length of 300 or fewer characters.

Any re-publish, regardless of whether a change was made, assuming the appropriate authorization level.

Any re-publish, regardless of whether a change was made, assuming the appropriate authorization level.

Background job

If there is any error that occurs when the data is being pushed, such as a time-out or a network connection issue, a background job runs to retry the push. This job is scheduled to run every 20 minutes and tries to push any document with a MYSDS Status of Pending. (See section 2.2.1 for additional information).

Authorization levels

The Authorization Levels that determine if data is pushed is controlled by the Application Setting MYSDS > MYSDSAUTHLEV. The syntax for entering multiple authorization levels for the Application Setting is to have them separated by semi-colons.

By default, the setting contains the following Authorization levels:

3 – Both Viewers

3 – Both Viewers

2 – Internet Viewer

2 – Internet Viewer

1 – Intranet Viewer

1 – Intranet Viewer

4 – Orders Interface

4 – Orders Interface

-1 – All Viewers

-1 – All Viewers

By default, the setting does not list the following Authorization level

0 – Not authorized

0 – Not authorized

Viewing submission statuses and errors

Studio provides the ability to easily view the documents that have been sent to the MYSDS API, the status of those documents, and if there were any errors that occurred in the process.

Viewing submission statuses

The MYSDS API sends processing logs back to Studio for both successful submissions and errors.

These logs can be viewed in the MYSDS Status column on the List of Published Documents and All Published Documents forms. This column appears on the PDF Tab only.

The column displays one of the following status options:

Success – Data was sent to the API and then successfully sent to MYSDS.

Success – Data was sent to the API and then successfully sent to MYSDS.

Error – Data was sent to the API and an error was returned. These errors are recorded in the Error Log and background job does not try to process them again. Clicking the link opens a pop-up listing the error(s). See the following section additional information on errors.

Error – Data was sent to the API and an error was returned. These errors are recorded in the Error Log and background job does not try to process them again. Clicking the link opens a pop-up listing the error(s). See the following section additional information on errors.

Warning - Data was sent to the API, but a LocaleNotFound error was returned. Clicking the link opens a pop-up listing the error(s).

Warning - Data was sent to the API, but a LocaleNotFound error was returned. Clicking the link opens a pop-up listing the error(s).

Pending – Data was sent to the API; however, due to an error when the data was pushed (timeout, connection issue, etc.) the data was not sent. A background job continues to try to push the data again for up to 3 attempts. Clicking the link opens a pop-up listing the error and the number of attempts that have been made to push to the API.

Pending – Data was sent to the API; however, due to an error when the data was pushed (timeout, connection issue, etc.) the data was not sent. A background job continues to try to push the data again for up to 3 attempts. Clicking the link opens a pop-up listing the error and the number of attempts that have been made to push to the API.

LocaleNotFound

LocaleNotFound is flagged with the job status of Warning in the Error Log. This warning indicates that there was an error with some or all the Format/Subformat and Market Language combinations that were sent to the API, and displays all these content errors together:

For more information, please visit: https://wercs.helpdocsonline.com/publishing-triggers

Add Appendix

Appendix A

Id

Name

MarketId

LanguageId

ShortName

ExportCode

WERCS SDS Subformat

WERCS IDS Subformat

Base Language (language Link)

Language - Studio code (GHSPro Set-up)

Language - Studio code

LCID

1

English (UK & ROI)

44

44

GBR

44

XGHS

DETE

English (UK)

English (UK)

BE

2057

2

France

33

33

FRA

33

EGHS

DETE

French

French

FR

1036

3

Germany

49

49

DEU

49

EGHS

DETE

German

German

DE

1031

4

Italy

39

39

ITA

39

EGHS

DETE

Italian

Italian

IT

1040

5

United States

1

1

USA

1

AGHS

English (US)

English (US)

EN

1033

7

Canada (French)

101

101

CAN-fra

101

HGHS

Canadian French

Canadian French

CF

3084

12

Spain

34

34

ESP

34

EGHS

DETE

Spanish (Europe)

Spanish (Europe)

ES

1034

13

Norway

47

47

NOR

47

EGHS

DETE

Norwegian

Norwegian

NO

1044

14

Australia

65

65

AUS

65

UGHS

English (Australia)

English (Australia)

AE

3081

15

Greece

30

30

GRC

30

EGHS

DETE

Greek

Greek

EL

1032

16

Denmark

45

45

DNK

45

EGHS

DETE

Danish

Danish

DA

1030

17

Czech Republic

420

420

CZE

420

EGHS

DETE

Czech

Czech

CS

1029

18

Finland

358

358

FIN

358

EGHS

DETE

Finnish

Finnish

FI

1035

19

Portugal

351

351

PRT

351

EGHS

DETE

Portuguese

Portuguese

PT

2070

20

Russia

7

7

RUS

7

1GHS

Russian

Russian

RU

1049

21

Netherlands

31

31

NLD

31

EGHS

DETE

Dutch

Dutch

NL

1043

22

Belgium (French)

32

33

BE

732

EGHS

DETE

French

Belgium (French)

BC

2060

23

Poland

48

48

POL

48

EGHS

DETE

Polish

Polish

PL

1045

24

Sweden

46

46

SWE

46

EGHS

DETE

Swedish

Swedish

SV

1053

25

Hungary

36

36

HUN

36

EGHS

DETE

Hungarian

Hungarian

HU

1038

26

Korea

850

850

KOR

850

KGHS

Korean

Korean

KO

1042

27

China (Simplified Chinese)

86

86

CHN-zho-s

86

CGHS

Chinese Simplified

Chinese Simplified

CN

2052

28

China (Traditional Chinese)

886

886

CHN-zho-t

886

4GHS

Chinese Traditional

Chinese Traditional

TA

1028

29

Slovenia

386

386

SVN

386

EGHS

DETE

Slovenian

Slovenian

SL

1060

30

Slovak Republic

421

421

SVK

421

EGHS

DETE

Slovak

Slovak

SK

1051

31

Latvia

371

371

LVA

371

EGHS

DETE

Latvian

Latvian

LV

1062

32

Estonia

372

372

EST

372

EGHS

DETE

Estonian

Estonian

ET

1061

33

Turkey

90

90

TUR

90

TURE

Turkish

Turkish

TR

1055

34

Lithuania

370

370

LTU

370

EGHS

DETE

Lithuanian

Lithuanian

LT

1063

35

Romania

40

40

ROU

40

EGHS

DETE

Romanian

Romanian

RO

1048

36

Bulgaria

359

359

BGR

359

EGHS

DETE

Bulgarian

Bulgarian

BG

1026

37

Japan

81

81

JPN

81

JGHS

Japanese

Japanese

JP

1041

38

Arabic

966

966

AAA-ara

966

NA

Arabic

Arabic

AR

1025

39

Belgium (Dutch)

32

31

BE2

731

EGHS

DETE

Dutch

Belgium (Dutch)

BU

2067

40

Croatia

385

385

HRV

385

EGHS

DETE

Croatian

Croatian

CR

1050

41

Serbia

381

381

SRB

381

EGHS

DETE

Serbian

Serbian

SR

2074

42

Belgium (German)

32

49

BE3

734

EGHS

DETE

German

Belgium (German)

BP

0

43

Indonesia

62

62

USA

62

IGHS

Indonesian

Indonesian

ID

1057

46

Austria (Germany)

43

49

AUT-deu

744

EGHS

DETE

German

Austria (Germany)

AP

3079

47

Finland (Swedish)

358

46

FIN-swe

746

EGHS

DETE

Swedish

Finland (Swedish)

FS

2077

48

Ireland (English)

353

44

IRL-eng

353

EGHS

DETE

English (UK)

Ireland (English)

IE

6153

49

Luxembourg (French)

352

33

LUX-deu

748

EGHS

DETE

French

Luxembourg (French)

LU

5132

50

Luxembourg (German)

352

49

LUX-fra

747

EGHS

DETE

German

Luxembourg (German)

LG

4103

51

Switzerland (German)

41

49

CHE-deu

741

EGHS

DETE

Swiss German

Swiss German

SG

2055

52

Switzerland (French)

41

33

CHE-fra

742

EGHS

DETE

French

Switzerland (French)

CH

4108

53

Switzerland (Italian)

41

39

CHE-ita

743

EGHS

DETE

Italian

Switzerland (Italian)

SU

2064

54

Azerbaijan

994

994

AZ

994

NA

NA

NA

NA

NA

55

Iceland

354

354

ISL

354

EGHS

DETE

Icelandic

Icelandic

IS

1039

56

Canada (English)

101

102

Can-eng

102

HGHS

English (US)

Canada (English)

CA

4105

57

Mexico (Mexican Spanish)

52

52

MEX-esp

52

5GHS

Spanish (Latin American)

Spanish (Latin America)

MS

2058

58

Brazil (Brazilian Portuguese)

55

55

BRA-por

55

BGHS

Brazilian Portuguese

Brazilian Portuguese

BR

1046

59

Vietnam

84

84

VNM

84

DGHS

Vietnamese

Vietnamese

VI

1066

60

Malaysia (Malay)

60

60

MYS-mal

60

YGHS

Malaysian

Malay

MA

1086

61

Malaysia (English)

60

660

MYS-eng

660

YGHS

English (UK)

ENGLISH (MALAYSIA)

ME

17417

62

Northern Ireland (Irish English)

440

353

XN

440

EGHS

DETE

English (UK)

Ireland (English)

IE

6153

For more information, please visit: https://wercs.helpdocsonline.com/add-appendix