

Consumer Products Reporting Tool for Formulators Checklist

This checklist provides basic instructions for the CPRTF and is ordered based on CARB staff's recommendation for filling out the tool.

Downloading and Saving customized CPRTF:

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| <input type="checkbox"/> | Use the Kiteworks link that CARB sends to you to download the customized version of the CPRTF. For more information watch CPRTF Module 1, located on the CPRT webpage . |
| <input type="checkbox"/> | Create a folder to save generated CSVs later. |

Before Editing/Importing Data:

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| <input type="checkbox"/> | A desktop version of Microsoft Excel is required to run the survey tool for formulators (the web-based version of the software is not compatible). |
| <input type="checkbox"/> | Enable macros (Go to Options > Trust Center > Trust Center Settings > Macro Settings, and then selecting 'Enable VBA macros'). |
| <input type="checkbox"/> | Enter in Contact Information. This information may be used in case CARB needs to reach out about any of the information reported. |

Editing/Importing Data:

Follow the checklist below for each page in the CPRTF. For the Product Ingredients, Fragrance Formulator and Solvent Manufacturer you may choose one of three data entry options. General Requirements must be fulfilled for any data entry option. Data for these pages may be entered manually to each page, through the CPRTF's built-in forms, or through importing. The other pages only have the option of entering manually or using a built-in form. **Using the built-in forms will pre-validate data**, the other options may require more runs of the validation report.:

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| <input type="checkbox"/> | Adding Product Information to the Product List page |
| | General Requirements |
| <input type="checkbox"/> | Density must be filled out. For products filled by volume only (e.g. milliliters (mL)), provide the <u>density</u> in grams per milliliter (g/mL). If the product is not filled by volume, then please enter the default density of "1" in this data field |
| <input type="checkbox"/> | If you have fragrance formulator information, fill it out. If any fragrance information is filled out, the Fragrance Formulator page must also be filled out. |
| | Via Manual Entry |
| <input type="checkbox"/> | Enter in data for all products. This data can only be entered in manually. |
| <input type="checkbox"/> | Adding Formulas to the ProductIngredients page |
| | General Requirements |

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| | <input type="checkbox"/> | When reporting an ingredient (that is not a propellant or solvent) ensure that the CAS number field is not blank, otherwise this will generate an error when validating. |
| | <input type="checkbox"/> | When reporting a propellant or solvent list the manufacturer. |
| | Via Manual Entry | |
| | <input type="checkbox"/> | Enter in data for all product ingredients on the ProductIngredients page. |
| | Via Form | |
| | <input type="checkbox"/> | Go to the EnterFormula page and use the 'Select Formula' drop-down menu to choose which product you are reporting ingredients for. |
| | <input type="checkbox"/> | Click on the 'Select Chem' button and click on the ingredients that are present in the product's formula so that they are highlighted in blue. You can use the 'Search by CAS' function in the top right to locate chemicals. |
| | <input type="checkbox"/> | Once the desired ingredients are selected, press 'Add Selected Ingredients' and they will be saved to the EnterFormula page. Any ingredients that are not present in the 'Select Chem' list will need to be entered manually into the EnterFormula page. |
| | <input type="checkbox"/> | Once the formula is complete, hit "Save Record" to save the formula and transfer it to the ProductIngredients page. If any errors are present, the worksheet will display them. The errors must be fixed before the formula will save and transfer to the ProductIngredients page. Repeat for each individual product. |
| | Via CSV Import | |
| | <input type="checkbox"/> | To import product information into ProductIngredients a CSV file is required. Using your program of choice, generate a CSV that matches the layout and headers of the ProductIngredients page in the CPRTF. The number of columns and headers of the CSV must match exactly with the CPRTF page. A blank CSV cannot be uploaded. |
| | <input type="checkbox"/> | Click the 'Menu' button, then the 'Import Data' button, then the 'Product Ingredients' button. Once the Files Explorer window pops up navigate to the CSV for the product list and import it. Importing data will upload all product ingredients at once. <u>*Any products previously entered onto the ProductIngredients page will not be erased, Any duplicate data erroneously uploaded must be deleted before finalizing the data.</u> |
| | <input type="checkbox"/> | Adding Formulator/Manufacturer Information. |
| | General Requirements | |
| | <input type="checkbox"/> | When reporting a solvent contact information for the manufacturer must be provided. |
| | Via Manual Entry | |
| | <input type="checkbox"/> | Enter in data for all formulators/manufacturers. |
| | Via Form | |
| | <input type="checkbox"/> | For either the FragranceFormulator or SolventManufacturer pages, press the 'Add Formulator/Manufacturer' button Follow the pop-up to enter in the formulator/manufacturer information and then click 'Save Record.' |
| | <input type="checkbox"/> | Repeat for each individual formulator/manufacturer. |

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| Via CSV Import | |
| <input type="checkbox"/> | To import product information into FragranceFormulator or SolventManufacturer pages a CSV file is required. Using your program of choice, generate a CSV that matches the layout and headers of the FragranceFormulator or SolventManufacturer pages in the CPRTF. The number of columns and headers of the CSV must match exactly with the CPRTF page. A blank CSV cannot be uploaded. |
| <input type="checkbox"/> | Click the 'Menu' button, then the 'Import Data' button, then the 'Fragrance Formulator' or 'Solvent Manufacturer' button. Once the Files Explorer window pops up navigate to the CSV for the product list and import it. Importing data will upload all product ingredients at once. <u>*Any products previously entered onto the FragranceFormulator or SolventManufacturer pages will not be erased, Any duplicate data erroneously uploaded must be deleted before finalizing the data.</u> |
| <input type="checkbox"/> | Import All Data via CSV(optional) |
| <input type="checkbox"/> | Click the 'Menu' button on any of the pages, click on the 'Import Data' button, then click on the 'Import All' button. A pop-up will appear for each page individually prompting to upload a CSV. Either upload the CSV for the page prompted or move onto the next prompt to upload to the next page. <u>*Importing will not erase and replace any data already previously entered into a page. Responsible Parties are responsible for deleting any data erroneously uploaded</u> |

Validating Data:

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| <input type="checkbox"/> | Go to the Validate_Survey Page and select the 'Run Report' button to check the data entries and see if any corrections need to be made. The Validation Report does not need to be manually activated before completing a survey, but it is encouraged to be ran multiple times before completion while filling out information. The Validation Report will however be automatically run before data can be sent to CARB. |
| <input type="checkbox"/> | Fix any errors that are described on the Validation Report. Then select the 'Run Validation Report' button again to ensure that all errors are resolved. Once there are no more errors, move on to certification. |

Certify Data:

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| <input type="checkbox"/> | Go to the Certify page, click 'Certify Data,' and follow the instructions in the pop-up that appears. |
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Export CSVs:

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| <input type="checkbox"/> | Click the 'Menu' button on any of the pages, click on 'Export CSVs' to generate the files that will need to be sent to CARB. Using this button will automatically trigger the Validation Report to be run to ensure that any erroneous data is fixed before being submitted to CARB. |
| <input type="checkbox"/> | The same Kiteworks link where you downloaded the CPRTF may be used to upload your files. If the link does not work, email CARB staff or the Survey Help Box and they will send a new link to upload your CSVs. |