



idetic™

iDetic Solutions

USERS GUIDE

Version 1.0.23.4

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CONFIDENTIALITY WARNING

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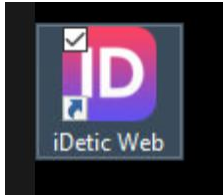
1.0 Getting Started

- 1) If needed, power on the PC underneath the table surface.



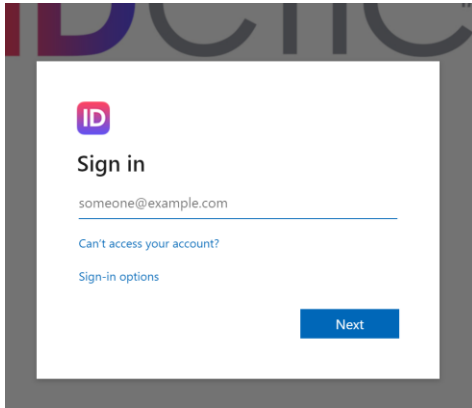
a.

- 2) Open the iDetic Web shortcut.



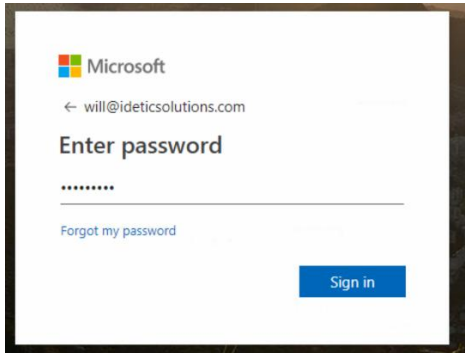
a.

- 3) When prompted for an account, find your previously logged in account, or select “Use another account”.



a.

- 4) Log in with your username and password.



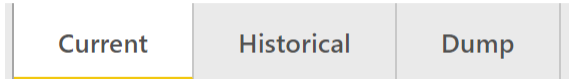
a.

- b. If you do not know your username and password, use the “forgot my password” option or contact your sites iDetic administrator for assistance.

- 5) At the iDetic landing page, you will have the ability to navigate through the Dashboard, Scanner, Search, Storage Manager, Reports, and Help page.

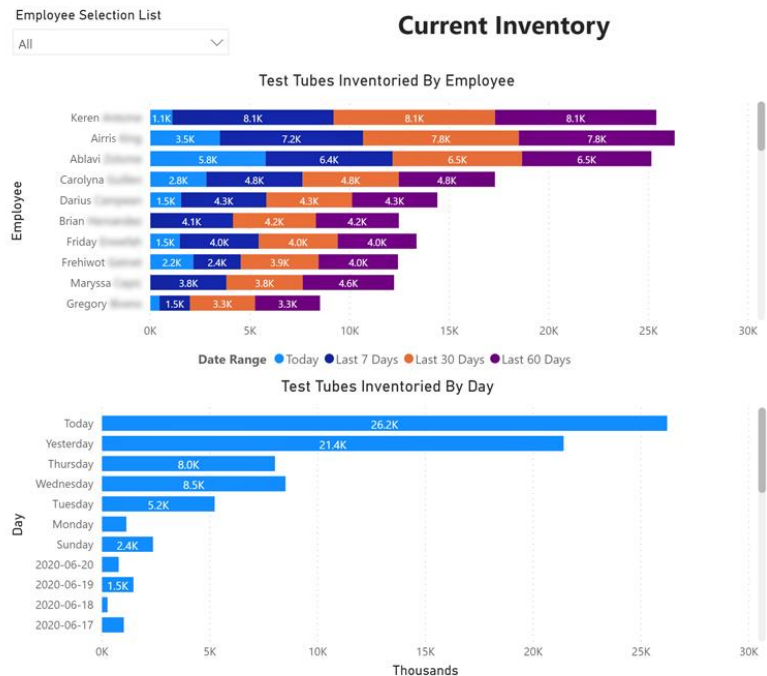
2.0 Dashboard and News

- 1) After login the homepage will be presented with a scrolling news banner and dashboard.
- 2) The news banner will usually contain important announcements from the iDetic administration team, such as upcoming upgrades and features.
- 3) The dashboard will have three tabs at the bottom for Current, Historical, and Dump.



a.

- 4) The Current tab will show user and scan statistics representing your current inventory, meaning tubes that have not been dumped.

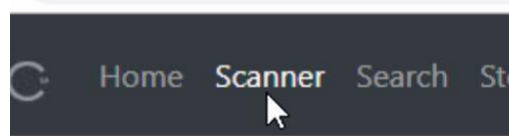


a.

- 5) The Historical tab will show user and scan statistics, including dumped samples, representing the entirety of your inventory going back as long as the system is configured to store data.
- 6) The Dump tab will show user and dump statistics to track how many samples were dumped per day, and by whom.
- 7) iDetic support can add additional reports to the dashboard per client requirements.

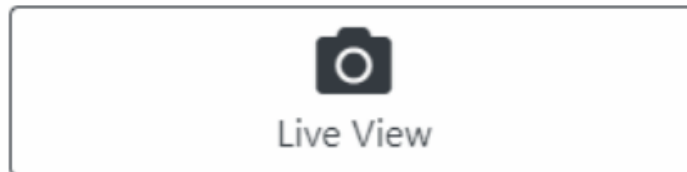
3.0 Scanner

- 1) Click the “Scanner” link in the top menu bar.



- a.
- 2) Ensure the iDetic rack is placed evenly and securely against the iDetic Rack Guide.
- 3) Ensure there are no obstructions between the iDetic Camera Enclosures and the rack.
- 4) Ensure the tube barcodes are clean, clearly visible, and facing the iDetic Camera Enclosures to ensure maximum readability during the scanning process.

- a. If desired, you can use the “Live view” button to verify alignment.



- b.



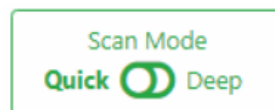
- c.

- 5) If you have Codabar barcodes, turn Codabar “ON”. Otherwise, leave “OFF” to save ~2 seconds.



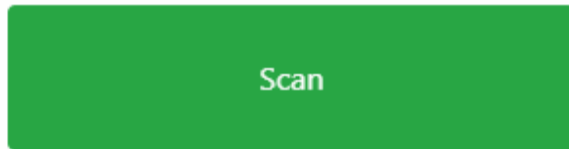
- a.

- 6) If you have samples with poor quality or very tiny barcodes, you may need to enable “Deep Scan” which takes a few seconds longer but is able to detect significantly more barcodes than “Quick Scan”.



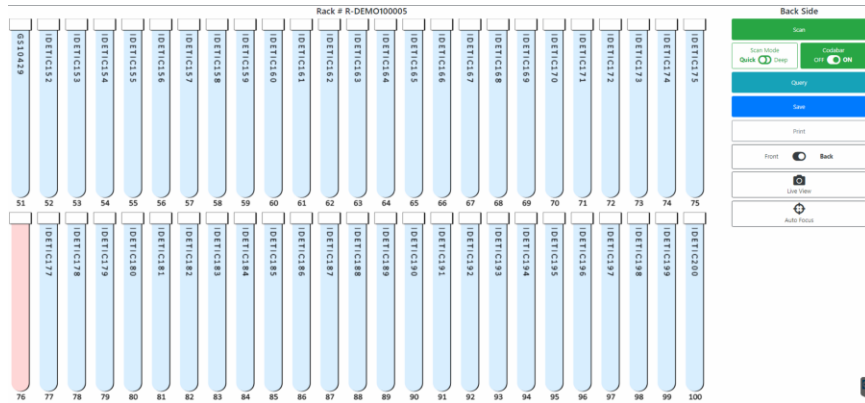
- a.

7) Click the “Scan” button.



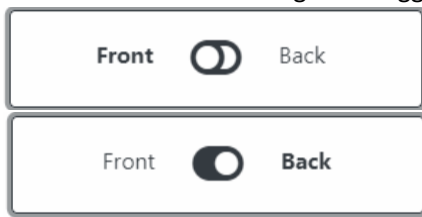
a.

8) When finished, you will be presented with the graphical representation of one side of the rack and its scanned tubes:



a.

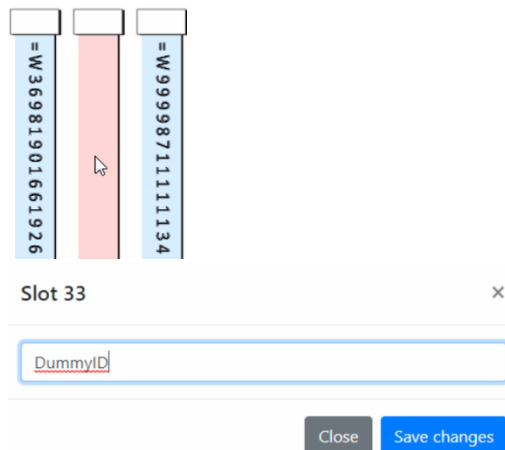
9) Review both sides of the rack using the “Toggle Sides” button.



a.

b.

10) Red tubes indicate a barcode that could not be scanned. You may choose to either correct the barcode alignment and rescan the whole rack, or click the red tube and manually type or scan in the correct ID.



a.

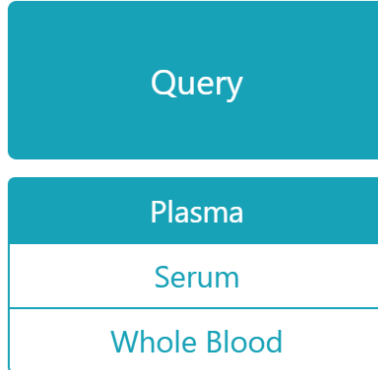
b.

11) In the event many properly aligned tubes are missing after a scan, you may wish to use the “Auto Focus” button to recalibrate the cameras and scan again.

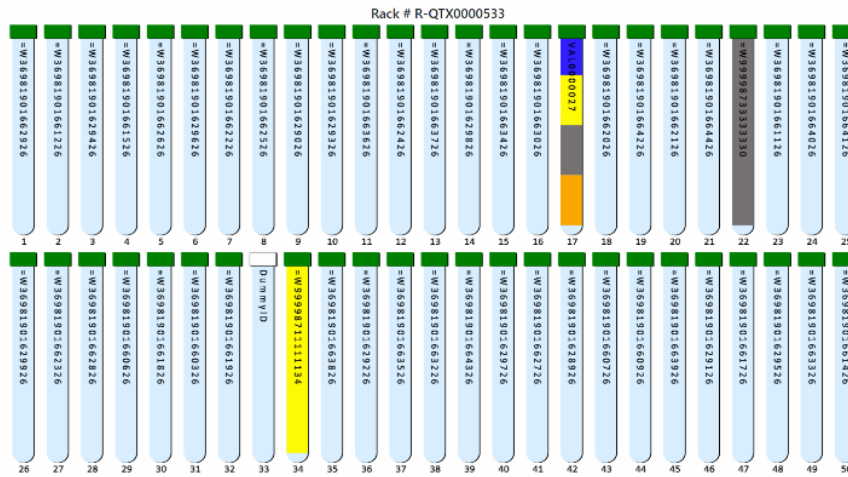


a.

- 12) Once all tubes are accounted for on both sides, you may either “Query” or “Save” the rack.
 - a. “Query” will send each of the ID’s to your local reporting service, gather information regarding each tube, and display the information back using a color-coded guide.
 - i. Your administer may have setup multiple queries to be used throughout various processes, please select the best one according to your internal policies.



ii.



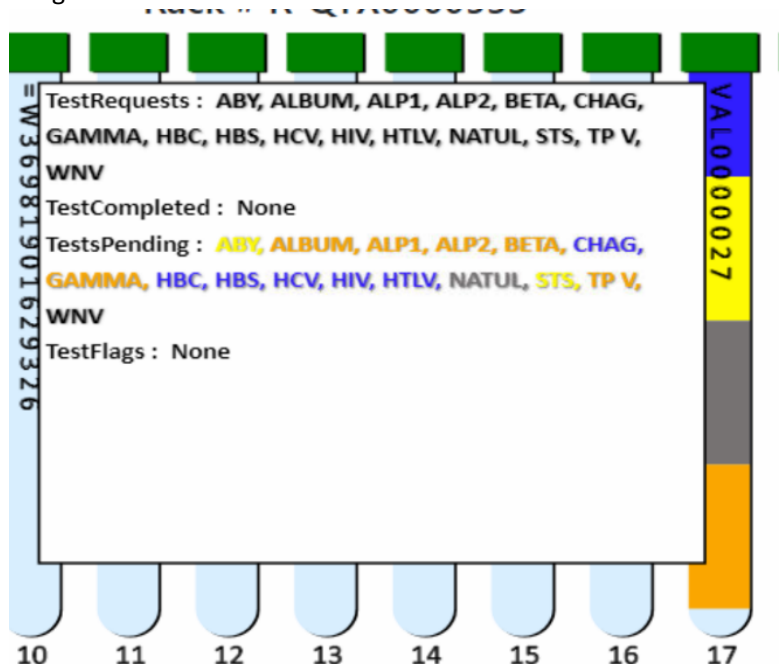
iii.

- iv. A white cap indicates the sample was not found in the target computer system, a green cap indicates there were no test flags, and a red cap indicates the presence of a test flag on the tube.

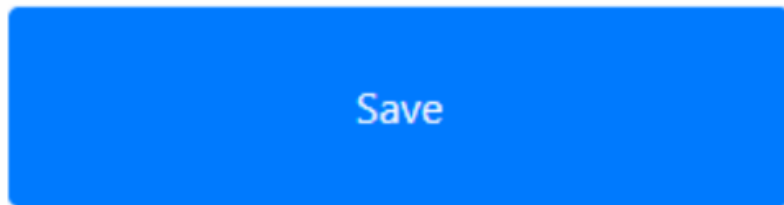
a.



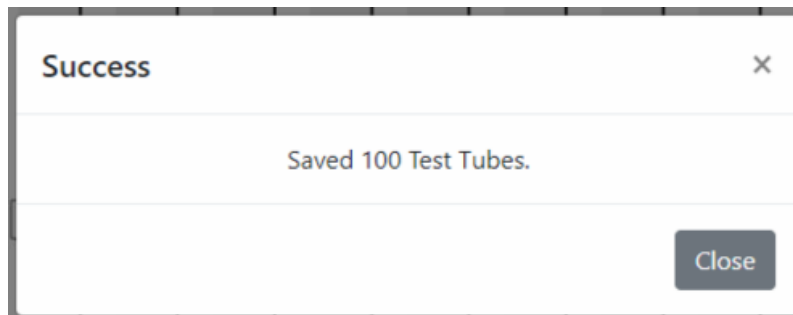
- v. A colored tube indicates messages were returned from the Query that your iDetic administrator wishes you to review. Hover the cursor over each tube to see the exact messages.



1. 10 11 12 13 14 15 16 17
- b. Select "Save" to add the samples to the iDetic database, where they will be associated with their specific rack and slot location for later review and retrieval.



i.



ii.

- c. If configured for the organization, you may need to identify what type of tubes are in the rack being scanned. If there are mixed types, save the rack as the most common tube type and change the outliers in either Rack Manager, Tube Manager, Unstored Racks, or the Stored Racks Screen.



i.

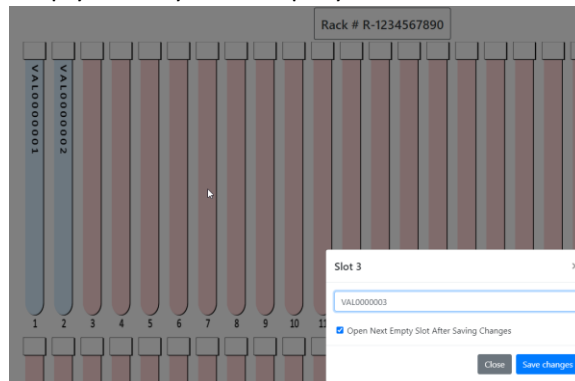
- 13) If configured, users can manually scan racks and tubes into the scanner screen. Contact an iDetic admin to enable.

- a. Start by clicking the button labeled “Click Here to Enter Rack ID” and scanning/typing the rack ID to be populated.



i.

- b. Once entered, click the first tube and begin scanning/typing the sample ID’s. If you leave the “Open Next Empty Slot After Saving Changes” option checked, it will automatically switch to the next empty slot so you can rapidly scan the tubes.

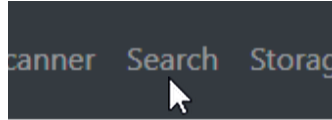


i.

- c. You may click the graphic of the Tube Cap to quickly empty/delete a tube slot that was accidentally scanned/entered.

4.0 Search

- 1) Click the “Search” link in the top menu bar.



a.

- 2) You will be presented with default “Basic” search screen where you can search the iDetic database by Sample ID, Rack ID, Tube Assignment, Scan Station Name, Site, Storage Location, Send Out Location, Created By, or Last Updated By. Check “Include Age Timers” if you wish to see the Thaw Counter and temperature state Age Timers. You may also specify a date range to limit your search, which will make the query faster if you know the date range of the information you are retrieving.

Test Tube Search

Search:

Basic / **Advanced**

Search By:

Select All SampleID RackID Tube Assignment Scan Station Name Site Storage Location Send Out Location Created By Last Updated By Include Age Timers

Created Date: Last Updated Date:

Search

Search By File Upload (beta): **Browse** **Upload**

Screen File (Only .txt, .csv, .xls, and .xlsx file formats supported)

Columns Visibility

File Export

Show: entries Filter Results By:

SampleID	RackID	SlotNumber	TubeAssignment	Site	StorageLocation	ScanStationName	CreatedBy	CreatedDate	LastUpdatedBy	LastUpdatedDate
No data available in table										

a.

- 3) You may select “Advanced” to search the database using multiple criteria, for example Samples scanned by a certain user, on a certain date, and with a certain tube type.

Test Tube Search

Search:

Basic / **Advanced**

Sample IDs: Rack IDs:

Tube Assignments: Storage Locations: Send Out Locations: Sites:

Scan Station: Created By: Last Updated By:

Created Date: Last Updated Date:

Include Age Timers

Search

a.

- 4) In this example, we will search by Rack ID by entering the rack ID used in the “Scanner” tutorial, selecting the “Rack ID” option, and then clicking “Search”.

Test Tube Search

Search:

Basic Advanced

R-VAL1000002

Search By:

Select All SampleID RackID

Created Date:

mm/dd/yyyy

Search

Column Visibility

a.

- 5) You will be presented with your search’s relevant Sample ID’s, Rack ID’s, Slot Numbers, Tube Assignment, Site, Storage Location, Created By user, Created Date, Last Updated By user, Last Updated Date, Scan Station Name, and also an option to “Check Out” a sample while there for convenience. Age Timer and Thaw Counter fields will be available if inclusion was selected.

Test Tube Search

Search:

Basic Advanced

R-VAL1000002

Search By:

Select All SampleID RackID Tube Assignment Scan Station Name Site Storage Location Send Out Location Created By Last Updated By Include Age Timers

Created Date: mm/dd/yyyy

Last Updated Date: mm/dd/yyyy

Search

Column Visibility

Search By File Upload (beta):

Choose file

Reset Upload

Screen File (Only .txt, .csv, .xls, and .xlsx file formats supported)

File Export

Show 100 entries

Filter Results By:

SampleID	RackID	SlotNumber	TubeAssignment	Site	StorageLocation	ScanStationName	CreatedBy	CreatedDate	LastUpdatedBy
VAL0000001	R-VAL1000002	1	Red Top	Validation	Cooler	IDETICDEMO01	Will Thomason	Thursday, 04/08/2021 5:30:53 PM	Will Thomason
VAL0000002	R-VAL1000002	2	Red Top	Validation	Cooler	IDETICDEMO01	Will Thomason	Thursday, 04/08/2021 5:30:53 PM	Will Thomason

a.

- 6) Depending on your screen resolution, you may need to click the blue “+” or red “-” icon next to each entry to show/hide all requested fields.

SampleID	RackID	SlotNumber
+ VAL0000001	R-VAL1000002	1

a.

SampleID	RackID	SlotNumber
VAL0000001	R-VAL1000002	1
LastUpdatedDate		Thursday, 04/08/2021 5:30:53 PM

- b.
- 7) You may choose which columns are displayed using the “Column Visibility” drop down.

Column Visibility ▾

- SampleID
- RackID
- SlotNumber
- TubeAssignment
- Site
- StorageLocation
- ThawCounter
- RoomTemp
- Refrigerated
- Frozen

- a.
- 8) You may also export the contents to a file for further review, manipulation, or printing using the “File Export” option. Only the columns selected in “Column Visibility” will be exported/printed.

File Export

Copy Excel CSV PDF Print

Show 100 entries

- a.
- 9) Age Timers / Thaw Counter
- a. Note that the Age Timers found here in Search and throughout the application are determined by calculating the time between check in and check outs the tubes have spent in storage locations assigned with Room Temp, Refrigerated, Frozen, and Deep Frozen temperature states that are configured in the admin settings.
 - b. If the racks are not concurrently updated in iDetic as they are moved in the physical world the counts could be inaccurate.
 - c. If the users are not using the Storage Locations feature the counts will be inaccurate.
 - d. The Thaw Counter starts at 0 and increments each time a tube is removed from a frozen state.
 - i. Moving a tube/rack from freezer to freezer would not increment the counter.

- ii. Checking the tube out of a frozen rack or moving the tube/rack to a refrigerated or room temp location would increment the counter.
- e. In the event a tube is ever placed in the system twice an error will generate and “Duplicate” will be displayed under all the timers since the system cannot logically determine which is accurate. This is to prevent double counting the age time, and users who wish to use this feature must avoid scenarios where a tube is in the system more than once.
- f. iDetic is not an MDDS or 510k registered software and thus cannot make determinations or interpretations to sample acceptability or test results. Users and Clients use this feature at their own risk and may not hold iDetic accountable in the event the calculations are inaccurate for any reason, be it user or system error.
- g. Due to the many reasons the calculations could be inaccurate, warnings are displayed anytime you see the age timers to remind the users to always double check the system generated information.

RoomTemp Refrigerated Frozen DeepFrozen LastUpdatedBy

These times are calculated based on check in and check out times from iDetic storage locations based on unique Tube ID's or shared Tube ID's with unique tube assignments. Though they have been thoroughly tested there are many exceptions both known and unknown that could cause the calculations to be inaccurate. Caution is advised and these timers are for informational purposes only, they are not to be used in any sample acceptability or result accuracy decisions/interpretations.

- h. 10) You may also check a tube out from this page, and if configured list the reason why you are checking it out.

- a. 11) You may also check multiple tubes out at the same time by using ctrl/shift keys and using the checkout button at the top of the ID list.

SampleID	RackID	SlotNumber	TubeAssignment	Site	StorageLocation	ScanStationName	CreatedBy	CreatedDate	LastUpdatedBy	LastUpdatedDate
W047021660130	H-0000230	35	Antibody Screen Tube						Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	40	Antibody Screen Tube						Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000230	11	Antibody Screen Tube						Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	41	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	30	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	21	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	22	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	18	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	23	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021660130	H-0000235	1	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021640180	H-0000235	27	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST
W047021640180	H-0000235	19	Antibody Screen Tube	RBC	RBC Probe 5	RBC01	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST	Carle Rivers	Thursday, 05/05/2022 4:53:09 PM EST

- a. 12) When searching for a tube that has been checked out and has no other tube in inventory, you will see that it is checked out in the search results.

SampleID	RackID	SlotNumber	TubeAssignment	Site	StorageLocation	ScanStationName	CreatedBy	CreatedDate	LastUpdatedBy
IDETIC103	Checked Out	Broken Tube	None	Validation			Will Thomason	Monday, 04/11/2022 11:33:19 AM EDT	Will Thomason

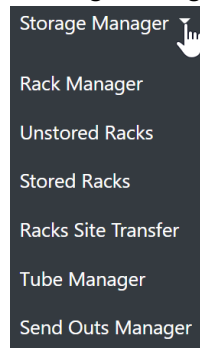
- 13) If looking for a specific tube type, use the advanced search screen to see which specific tube types were located, checked out, and not found.
- 14) You may also upload an excel or text file to the search screen and iDetic will automatically attempt to locate the sample ID's and either output the sample ID's on the screen for further searching or generate a new file for you to download consisting of all of the original data with the iDetic location data appended in new columns.

Search By File Upload (beta):

- Screen File (Only .txt, .csv, .xls, and .xlsx file formats supported)
- a.
 - b. **Note this feature will not work until configured by iDetic administrators, please reach out to them for instructions and training on how to enable file uploads.**

5.0 Storage Manager

- 1) Click the “Storage Manager” link in the top menu bar.



- a.
 - b. You will be given the option to navigate to the Rack Manager, Unstored Racks, Stored Racks, Racks Site Transfer, Tube Manager, and Send Outs Manager pages.
- 2) Rack Manager
 - a. The Rack Manager screen was designed to allow an individual to grab a barcode scanner and quickly go through and associate racks to their storage locations through the “Check In”, “Check Out”, or “Dump” options in the system.

Rack Manager

- i.
- b. To use the “Check In” option place the cursor in the “Storage Barcode:” field and begin scanning the storage location barcodes followed by the rack barcodes in your storage location. When you scan the next “Storage Location Barcode” the page will automatically update the new storage location for the next racks you scan until you scan the next “Storage Location Barcode”. This means you can rapid fire scan an entire freezer by just scanning the storage location barcode, then racks in that location, and repeat.

Id	Rackid	
31	R-QTX0000533	Check Out Dump
13	R-ATL0000053	Check Out Dump

- i.
- c. The “Check Out” feature uses the same concept as “Check In” but does not require a storage location. Any rack you scan into “Check Out” will be automatically removed from its current storage location.

- d. The “Dump” Feature works similarly to “Check Out”, except it indicates that the racks contents have been dumped, destroyed, or otherwise removed and the rack is now empty.
- e. In either screen you may update individual tube assignments.

3) Unstored Racks

- a. In the “Unstored Racks” screen you can see racks that have been scanned, but never associated to a storage location. Click the blue RackID to expand the rack and view its contents or edit its individual tube assignments. You may also use ctrl/shift to select multiple racks and either Check In or Dump them from this screen.
- b. The “Assignment” button next to each rack lets you update the entire racks Tube Assignments.
- c. Note that the racks can be configured to highlight red once they reach a certain age, which is configurable.

File Export

Check In Dump Deselect all

Show 100 entries Filter Results By:

Site	RackID	TubeAssignments	CreatedBy	CreatedDate	LastUpdatedBy	
Validation	R-DONOTDUMP	Pink Top,Purple Top,White Top	Hilario Urqueta	Thursday, 10/14/2021 10:35:24 AM EST	Hilario Urqueta	Check In Dump Assignment
Validation	R-TEST		Will Thomason	Friday, 12/18/2020 1:56:59 PM EST	Will Thomason	Check In Dump Assignment
Validation	S-TEST		Will Thomason	Friday, 12/18/2020 1:54:13 PM EST	Will Thomason	Check In Dump Assignment
Validation	R-VAL0000033	Red Top	Validation User	Wednesday, 02/26/2020 1:18:52 PM EST	Validation User	Check In Dump Assignment
Atlanta	R-FREEZER90	Purple Top,Red Top,White Top	Will Thomason	Tuesday, 03/16/2021 1:09:11 PM	Will Thomason	Tuesday, 03/16/2021 1:12:33 PM Dump

File Export

Show 10 entries Filter Results By:

Sampled	SlotNumber	TubeAssignment	ThawCounter	RoomTemp	Refrigerated	Frozen	DeepFrozen	LastUpdatedBy	LastUpdatedDate
VAL90FREEZER1	1	Purple Top Red Top White Top	0	23d 04:31:47	0d 00:00:00	0d 00:00:00	0d 00:00:00	Will Thomason	Tuesday, 03/16/2021 1:09:14 PM
VAL90FREEZER2	2	Purple Top Red Top White Top	0	23d 04:31:46	0d 00:00:00	0d 00:00:00	0d 00:00:00	Will Thomason	Tuesday, 03/16/2021 1:09:15 PM
VAL90FREEZERDUP	3	Purple Top Red Top White Top	0	23d 04:31:44	0d 00:00:00	0d 00:00:00	0d 00:00:00	Will Thomason	Tuesday, 03/16/2021 1:11:42 PM
VAL90FREEZERDUP	4	Purple Top Red Top White Top	Duplicated	Duplicated	Duplicated	Duplicated	Duplicated	Will Thomason	Tuesday, 03/16/2021 1:11:43 PM

i.

ii.

4) Stored Racks

- a. In the “Stored Racks” screen you can see racks that have been scanned and stored into a location. Similar to “Unstored Racks”, you can expand the Rack ID and modify tube assignments, select multiple racks, and Check In (move), Check Out, and Dump racks.
- b. The “Assignment” button next to each rack lets you update the entire racks Tube Assignments.
- c. Note that the racks can be configured to highlight red once they reach a certain age, which is configurable.

Site	RackID	TubeAssignments	StorageLocation	CreatedBy	CreatedDate	LastUpdatedBy	
Validation	S-TEST		Validation	Will Thomason	Friday, 12/18/2020 1:54:13 PM EST	Will Thomason	Check Out Check In Dump Assignment

Showing 1 to 1 of 1 entries Previous 1 Next

i.

5) Rack Site Transfer

- a. In the “Rack Site Transfer” screen you can transfer Racks from one site to another. Each rack is associated with a Site when first created, and in the event you ship racks from one location to another they need to be transferred in the system to prevent inaccurate storage information.

Rack Site Transfer

Transfer to: Rack ID Search:

Please select a site.

San Antonio

Atlanta

Show entries

Id	Rackid
No data available in table	

b. Showing 0 to 0 of 0 entries

6) Tube Manager

- a. In the “Tube Manager” screen you can perform the same actions as the “Rack Manager” screen, except at the tube level.

Tube Manager

Rack ID Barcode: Test Tube ID:

Selected Rack:
Id: 61837, RackId: R-TEST0001711

File Export

Show entries Filter Results By:

SampleID	SlotNumber	TubeAssignment	
+W99991800020100	1	<input type="button" value="Purple Top"/> <input type="button" value="Red Top"/> <input type="button" value="White Top"/>	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Dump"/>
+W99991800020200	2	<input type="button" value="Purple Top"/> <input type="button" value="Red Top"/> <input type="button" value="White Top"/>	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Dump"/>
+W99991800020300	3	<input type="button" value="Purple Top"/> <input type="button" value="Red Top"/> <input type="button" value="White Top"/>	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Dump"/>
+W99991800020400	4	<input type="button" value="Purple Top"/> <input type="button" value="Red Top"/> <input type="button" value="White Top"/>	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Dump"/>
+W99991800020500	5	<input type="button" value="Purple Top"/> <input type="button" value="Red Top"/> <input type="button" value="White Top"/>	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Dump"/>

- b.
- c. To use the “Check In” option, first scan the Rack ID and then begin scanning the tubes as you place them in the Rack.
- i. NOTE: The tubes are automatically associated into the first numerically available slot on the rack. It is up to the user to fill the rack up starting from the first numerically available slot to the last.
- d. If you scan a tube twice, you will get a duplicate warning asking if you would like to add the tube as a duplicate or ignore it.
- e. You may select multiple rows of tubes by holding down the CTRL or Shift keys on your keyboard and using the blue top row buttons to Check Out or Dump the selected tubes.
- f. The “Check Out” feature uses the same concept as “Check In” but indicates a tube has been removed from the scanned rack.
- g. The “Dump” Feature works similarly to “Check Out”, except it indicates that the tube has been dumped, destroyed, or otherwise no longer exists.
- h. The “Edit” button next to each tube lets you change the ID of an existing tube or Check In a new tube to an empty slot. This bypasses the auto slot assignments using the quick entry field at the top of the screen.
- i. You may edit tube assignments in this screen as well.

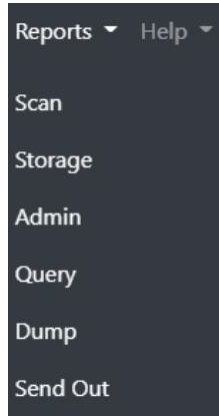
7) Send Out Manager

-
- In the “Send Out Manager” screen you can indicate tubes that have been shipped out to external locations.
- First click “New Shipment” to generate a new Shipment ID.
- Other users can now join this shipment using the “Shipments in Process” drop down box and load button.
- Once a shipment is created, create a new box by clicking “New Box”.
 - The Client Box ID can be defaulted to the iDetic Box ID or set to require a user entered custom Box ID by an Admin.
 - The iDetic Box ID is the shipment ID followed by a dash and a number that starts at one for the first box and increments by 1 for each new box.
 - You may optionally add a Tracking Number for each box which will appear on the various reports and manifests.

- iv. Verify that the Max Tubes Per Box setting is accurate to your current box limit, the default limit can be set by an Admin.
- f. You can either scan an entire rack that was previously scanned through the 'Scanner' screen, or individually scan tubes into the boxes. If a box is filled it will prompt you to create a new one.
- g. In the event you are sending out multiple tubes per donor and do not wish to scan each tube, you can scan only one tube per donor and use the "Default Tube Assignments" feature to add multiple tube assignments per entry. When you hit Save it will indicate in the database how many of each tube you sent per donor in the reports and database.
- h. You may select multiple rows of tubes by holding down the CTRL or Shift keys on your keyboard and using the blue top row buttons. From there you can delete or change tube assignments.
- i. An admin can set the default number of tube assignments for each site.
- j. An admin can set the default selection status of the "Export with Empty Tube Assignments" option, which determines if export files include or exclude tube assignments with a count of '0'.
- k. If you load a tube accidentally or are not sending out every tube in a scanned rack you may use the "Delete" option to remove it from the list.
- l. You may also use the sample level "Edit" button to edit individual ID's or tube assignments.
- m. Once the list is accurate, hit the "Close Shipment" button to update the database with the included tubes new send out location.
 - i. NOTE: If you scan a rack while "Auto Check Out" was selected, it will automatically check out the tubes from that rack when closing the shipment. Uncheck this option if you do not want the tubes to be checked out of their iDetic racks. If you scan an individual tube, it does not check out the tube from a previous rack as multiple tubes could exist with the same ID and the system does not have a way of telling which you are sending. Please make sure to, if needed, check out the specific tube from its previous location before or after scanning it into Send Out Manager.
- n. You may print or export the list to a file by expanding the "File Export" button, make sure to use the "Show All Boxes" option if you want the entire shipment to appear.
- o. You may also print a manifest with cover sheet using the "Print Manifest" button.
- p. You may also load and modify previously closed shipments with the "Closed Shipments" drop down list and load button.

5.0 Reports

- 1) Click the “Reports” link in the top menu bar.



- a.
- b. The reports screens are similar to “Search”, except where “Search” only provides current storage data that hasn’t been dumped or purged, the reports options will provide all historical data against all add/remove/edit actions in the system.

- 2) Scan

- a. In the “Scan” screen you can search the historical information of all Scans by Sample ID, Rack ID, Scan Station, Site, and Scanned By user.

Scan History Search

Search:

Search By: Select All SampleID RackID Scan Station Name Site Scanned By

Scan Date:

File Export:

Show 100 entries

Site	RackID	ScanDate	ScannedBy	EmailAddress
Atlanta	i-VAC000007	Wednesday, 06/24/2020 1:57:49 PM	Will Thomason	will@ideticsolutions.com
Atlanta	i-VAC000001	Wednesday, 06/24/2020 9:48:14 AM	Will Thomason	will@ideticsolutions.com

- i.
- ii. Click on the blue rack ID icon to expand and view more information.

- 3) Storage

- a. In the “Storage” screen you can view storage location historical changes and information by Sample ID, Rack ID, Site, Storage Location, Action, and Action Performed By user.

Storage Manager History Search

Search:

Search By: Select All SampleID RackID Site Storage Location Action Action Performed By

Action Date:

File Export:

Show 100 entries Filter Results By:

Site	RackID	StorageLocation	StorageLocationTree	Action	PerformedBy	EmailAddress	ActionDate
Atlanta	i-VAC000007	Refrigerator 206	Refrigerator 206	CheckedTestTubeOut	Hilaris Uniqueta	hilaris@ideticsolutions.com	Tuesday, 05/12/2020 12:36:06 PM
Atlanta	i-VAC000007	Refrigerator 206	Refrigerator 206	CheckedRackIn	Hilaris Uniqueta	hilaris@ideticsolutions.com	Tuesday, 05/12/2020 12:35:55 PM

- i.
- ii. Click the blue Rack ID icon to expand and view more information.

4) Admin

- a. In the “Admin” screen you can review all administrator actions by Site, Action, or Action Performed By user.

Site	Action	PerformedBy	EmailAddress	ActionDate
Atlanta	ClickedJoin	Will Thomason	will@ideticsolutions.com	Wednesday, 07/01/2020 10:18:59 PM
Atlanta	ClickedSettings	Will Thomason	will@ideticsolutions.com	Wednesday, 07/01/2020 12:18:24 PM

- i.
- ii. Click the blue Action button to expand and view more information.

5) Query

- a. The query report lets you view if and when a rack was queried along with the results that came back from the query.

DataSent	ResultsReceived
<pre>{ "sampleIds": ["8860026642", "8860026858", "8930082464N", "9440058552", "7170031732N", "7200031065N", "GY3060236", "0780363987N", "9440059095"] }</pre>	<pre>{ "0780363987N": { "TestRequests": ["SHAV", "SHBV", "SHCV", "SHIV", "SPARV"], "TestCompleted": ["SHAV", "SHBV", "SHCV", "SHIV", "SPARV"], "TestsPending": null, "TestFlags": null }, "1280086818N": { "TestRequests": ["SHAV", "SHBV", "SHCV", "SHIV", "SPARV"], "TestCompleted": ["SHAV", "SHBV", "SHCV", "SHIV", "SPARV"], "TestsPending": null, "TestFlags": null } }</pre>

- i.

6) Dump

- a. When racks are dumped the ID’s are automatically queried against the system to find any samples that are still pending tests. The Dump Reports screen contains entries for each session of dumps and a list of samples that are still pending testing for each of the racks that were scanned. Do not review the list until the query and dump process is marked as “Complete”. You may also use the “With Pending Tests Only?” option to filter out any sample ID’s that do not have any pending tests from appearing on the list.

SampleID	Slot	TestsPending	QueryStatus	DumpStatus
5810001462	23	RPR	Complete	Complete
5810001459	24	RPR	Complete	Complete
5810001452	25	RPR	Complete	Complete
5810001453	26	RPR	Complete	Complete
5810001455	27	RPR	Complete	Complete
5810001456	28	RPR	Complete	Complete
5810001454	29	ALBUM_ALP1_ALP2_BETA_GAMMA_RPR_TP_V	Complete	Complete

- i.
- ii. Click the blue “DumpSessionID” icon to expand and view additional information for each dump session.

7) Send Out

- a. When a user clicks the “Save” button in “Send Out Manager” a Send Out Session is created to document the actions. You may search the sessions by Sample ID, Session ID, Rack ID, Site, Send Out By User, Location, and Date Ranges.

Send Out History Search

Search:

Search By
 Select All SampleID SendOutSessionID RackID Site Sent Out By Location

Send Out Date

[Search](#)

File Export
 Show 100 entries Filter Results By:

Site	SendOutSessionID	SendOutDate	SentOutBy	EmailAddress
Validation	WT3-122PK0212021.6.070	Monday, 02/01/2021 1:22:06 PM	Will Thomason	wit@ideticsolutions.com

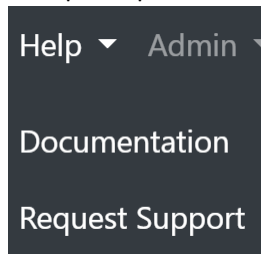
File Export
 Show 100 entries Filter Results By:

Location	RackID	SlotNumber	SampleID
Quest	H-HD0000015	1	H-D00000001
Quest	H-HD0000016	1	H-D00000001
Quest	R-VAL1000002	1	VAL0000001

- b.
- c. Click the blue “SendOutSessionID” icon to expand and view more information.

6.0 Help

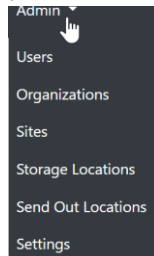
- 1) Click the “Help” drop down from the top menu bar



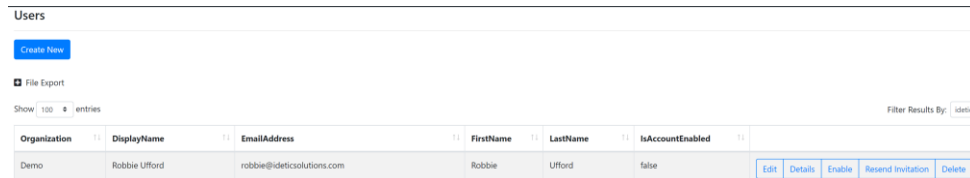
- a.
- b. You may either click “Documentation” to view the available documentation from iDetic, including the user guide, interface guide, changelog, etc.
- c. You may also click “Request Support” to be taken to an interactive troubleshooting guide that can help resolve almost all common issues.
 - i. In the event the guide cannot resolve the issue you will be prompted to enter your details and a ticket will be auto generated on your behalf.
 - ii. All tickets trigger an email and an automated phone call to the iDetic administrator on-call who will investigate and respond during the hours specified during the time frame specified by the service contract.

7.0 Admin

- 1) If you have been given administrator privileges to your organization, you will see an “Admin” option in the top menu bar.



- a.
 - 2) Users
 - a. In the users screen you may create new users, edit existing users, view existing users, enable/disable accounts, resend invitation emails, and delete accounts.



- b.
 - i. Edit lets you modify details of existing users
 - ii. Details lets you view details of existing users.
 - iii. Enable/Disable will toggle between letting a user login or not.
 - iv. Resend Invitation will send the user another copy of the invitation email that let’s them create their account once created.
 - v. Delete will remove their account from the system.
- c. To create a new user, click the “Create New” button and enter their First Name, Last Name, Email Address, Display Name, Organization, Site, and if needed the Default Storage Location.

Create User

First Name <input type="text" value="Hilar"/>	Last Name <input type="text" value="Enter Last Name Here"/>
Email Address <input type="text" value="Enter Email Address Here"/> <small>The Email Address field is required.</small>	Display Name <input type="text" value="Enter Display Name Here"/>
Organization <input type="text" value="Please select an organization."/>	
Site <input type="text" value="No sites exist under this organization."/>	
Default Storage Location (Optional) <input type="text" value="No storage locations exist under this site."/>	
<input type="button" value="Create"/>	
<input type="button" value="Back to List"/>	

- i.
 - ii. Once you enter the details and click “Create” the user will be sent an invitation email that lets them enable their account.
 - iii. Set the Default Storage Location to have all samples from this user automatically checked-in to the specified storage location.

3) Organizations and Sites

- a. Under the Organizations and Sites options you may view and edit the details of your organizations and sites, including selecting new administrators. Creating and Deleting new Organizations and Sites is limited to iDetic administrators.

Edit Organization

Name: Demo Telephone Number: 19664433842

Email Address: will@ideticsolutions.com

Address 1: 123 iDetic Solutions

Address 2: Enter Address 2 Here

City: Atlanta State: GA

Country: United States Zip Code: 30341 Last 4 of Zip Code:

Organization Owners:

- ideticsolutions.com
- robbee@ideticsolutions.com - (Robbie Ufford)
- hilario@ideticsolutions.com - (Hilario)
- will@ideticsolutions.com - (Will Thomas)
- hilarioest@ideticsolutions.com - (Hilario Test)

[Save](#) [Back to List](#)

i.

4) Storage Locations

- a. Storage locations allows an admin to create and manage the storage locations configured for their organization. It is recommended to speak with an iDetic administrator for live training to make the most out of this system.

Storage Locations

[Create New](#) [Paste](#)

File Export

Show 100 entries

ID	Organization	Site	Name	BarcodeID	
1	Demo	Atlanta	Refrigerator 208	S-208	Create Edit Copy Paste Details Delete
2	Demo	San Antonio	SAT Fridge 1	S-SATFridge1	Create Edit Copy Paste Details Delete
41	Validation	Validation	Validation	S-Validation01	Create Edit Copy Paste Details Delete
43	Demo	Atlanta	Refrigerator #209	S-209	Create Edit Copy Paste Details Delete
82	Demo	Atlanta	Room 500	S-500	Create Edit Copy Paste Details Delete

- b.
- c. A traditional storage location hierarchy would resemble:
 - i. Organization > Site > Room > Shelving Unit > Shelf > Row > Rack > Slot
- d. The Organization and Site are predetermined based on the user saving data, and the Rack and Slot are determined when scanned. The Room > Shelving Unit > Shelf > Row hierarchy remains totally customizable. Administrators can choose to have as many or as few levels of storage as they wish, while also naming each level to suit their needs
- e. To create the first hierarchy level, use the “Create New” button and give it a name, Barcode ID, and then select the organization and site this location is associated with.
 - i. Note that the Barcode ID is what the users will be scanning to associate racks to this location. It should not be a long identifier since the physical label can only hold so many digits. If you choose to Auto generate the barcode ID it will use the characters after the last ‘space’ in the ID. For example, if you choose “Room 209” it will use “209” as the root of the storage location barcode that will be built upon.
 - ii. To create a new item under a room, use the “Create” button next to the new entry and fill out the requested details similar to the original create option.

- iii. Once a segment of the storage hierarchy is created an administrator can use the “Copy” and “Paste” buttons to save time by duplicating and then renaming the newly pasted segment so they do not have to be recreated from scratch.
- iv. Once duplicated the Barcode ID’s can be updated in the new segment by clicking “Details” and “Regenerate Child BarcodeID Tree” on the destination segment.

5) Send Out Locations

- a. The Send Out Locations page lets you add, edit, view, and delete locations that are available in the “Send Out Manager” page.

Send Out Locations

[Create New](#)

File Export

Show 100 entries

ID	Organization	Site	Name	
4	Validation	Validation	Quest	Edit Details Delete
5	Validation	Validation	Lab Corp	Edit Details Delete

- b.
- c. If you have multiple sites you may need to add a shared send out location multiple times, one for each site.
- d. If you add an address to the send out locations, the address will auto populate on send out manifests. Otherwise, it will be left blank.

6) Settings

- a. The settings page allows you to adjust many of the key settings within iDetic, such as the query credentials and configurations, timeout settings, troubleshooting configurations, and most importantly the color assignments for the various messages being returned to iDetic through the query feature.

12	Demo	TestPendingTubeColor	CHAG	#311ff	Edit Details Delete
13	Demo	TestPendingTubeColor	ABO	ffff00	Edit Details Delete
14	Demo	TestPendingTubeColor	CMV	ffff00	Edit Details Delete
15	Demo	TestPendingTubeColor	STS	ffff00	Edit Details Delete
16	Demo	TestPendingTubeColor	ABY	ffff00	Edit Details Delete
17	Demo	TestPendingTubeColor	NATUL	977272	Edit Details Delete

- b.
- i. Settings outside of color configurations are beyond the scope of this guide and should not be modified without iDetic administrator assistance.
- c. New color assignments can be created by selecting “Create New” and then selecting one of the following Setting Types:

TestRequestedTubeColor

TestCompletedTubeColor

TestPendingTubeColor

TestFlagTubeColor

TestFlagCapColor

- d. Each setting type corresponds to one of the 4 message types that is sent back to iDetic, choose the one you wish to highlight. Most organizations use Test Pending for their color configs, but the system can be configured to display the colors from any of the messages.

- e. Once you have selected the Setting Type enter the value you wish to trigger a color change in the “Name” field. An example would be “HIV”. Then using the color wheel or copy pasting a hex code you can enter a color for that test code.

Setting Type

Name

Value

- i.
- f. Once added you can always change the color later using the Edit button on the Settings screen next to the test code.