



idetic™

iDetic Solutions

USERS GUIDE

Version 1.0.0

iDeticSolutions.com | 1-866-4IDETIC | info@ideticsolutions.com



CONFIDENTIALITY WARNING

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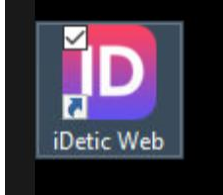
1.0 Getting Started

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



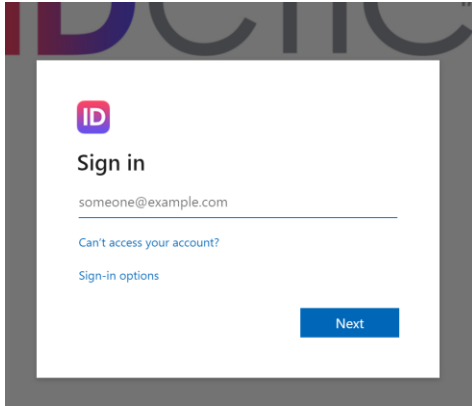
a.

- 2) Open the iDetic Web shortcut.



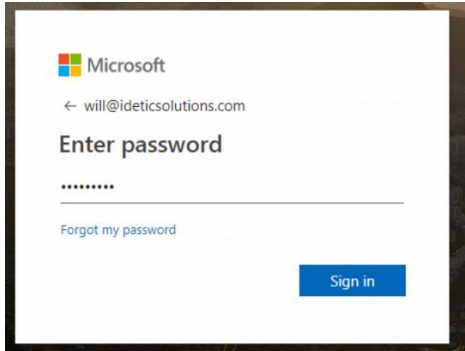
a.

- 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.



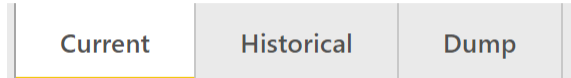
a.

- 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.

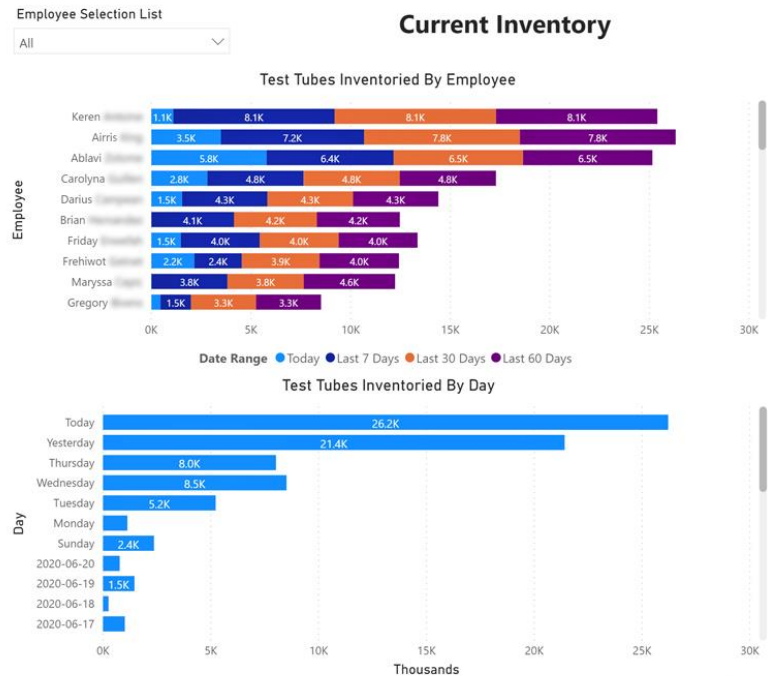
2.0 Dashboard and News

- 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.

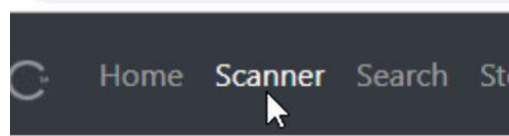


a.

- 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.

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.

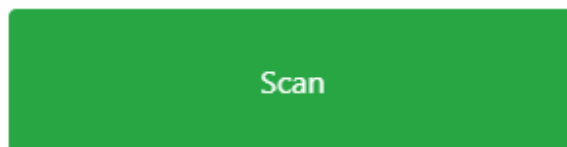


- b.



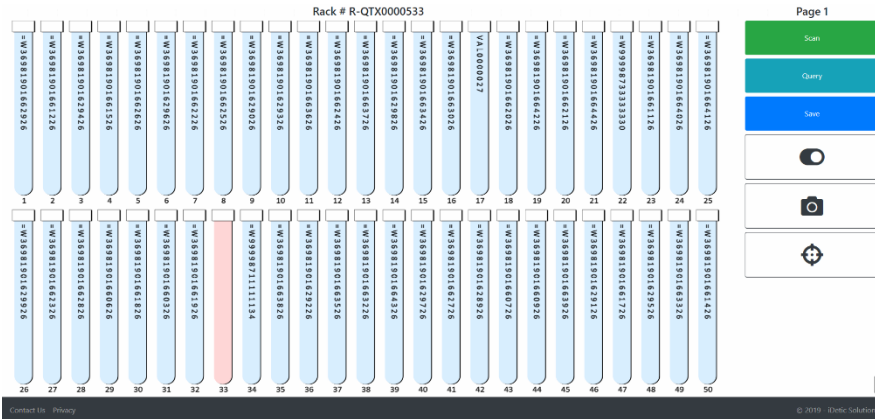
- c.

- 5) Click the “Scan” button.



- a.

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



a.

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

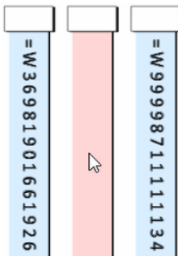


a.

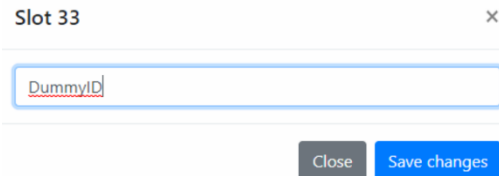


b.

- 8) 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.



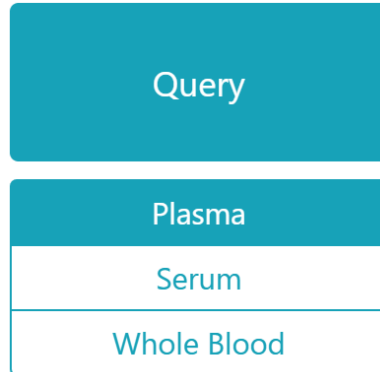
b.

- 9) 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.

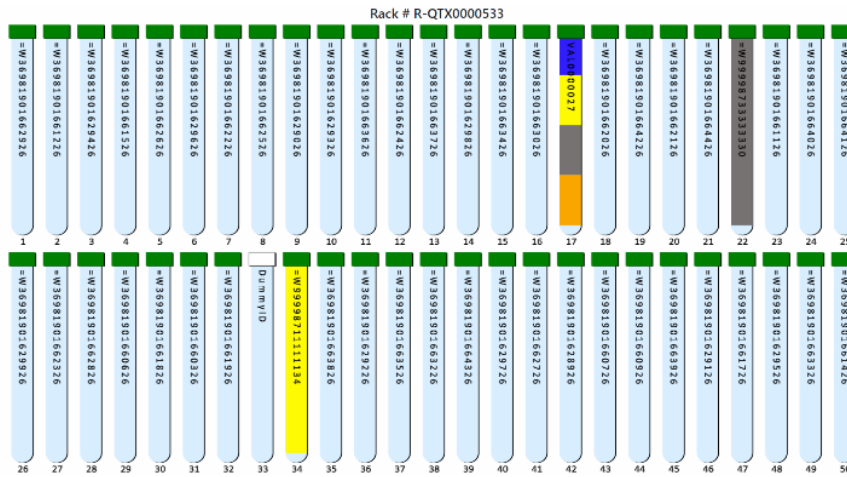


a.

- 10) 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.



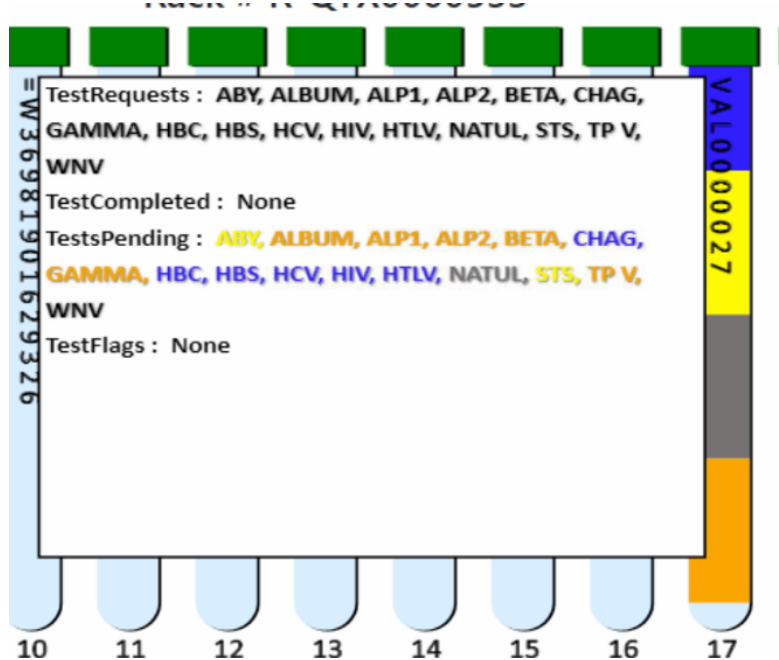
iii.

- 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.

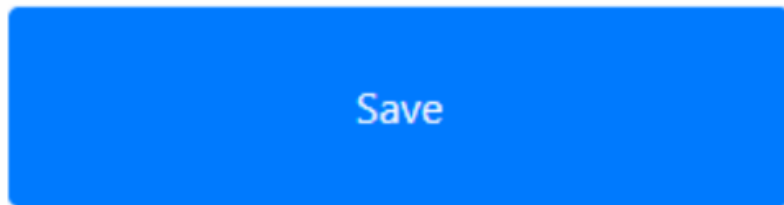
a.



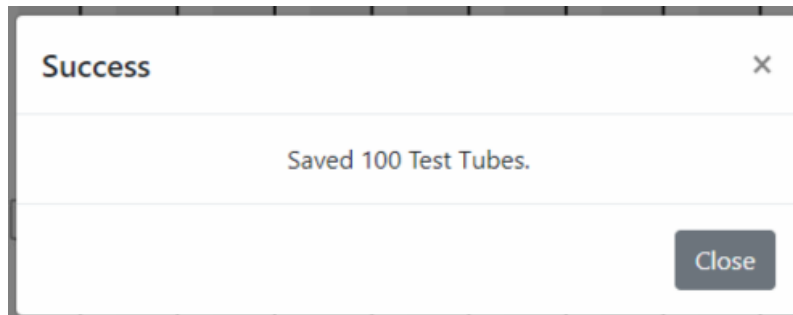
- v. A colored tube indicates messages were returned from the Query that your iDetic administrator wishes you to review. Hover the cursor over each tube to see the exact messages.



- 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.



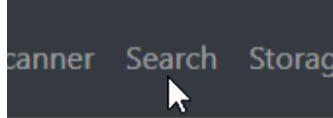
i.



ii.

4.0 Search

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



a.

- 2) You will be presented with search screen where you can search the iDetic database by Sample ID, Rack ID, Site, Storage Location, Created By, or Last Updated By. 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.

a.

- 3) 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:

Search By:

Select All
 SampleID
 RackID
 Sca

Created Date:

a.

- 4) You will be presented with your search's relevant Sample ID's, Rack ID's, Slot Numbers, Site, Storage Location, Created By user, Created Date, Lasted Updated By user, Last Updated Date, Scan Station Name, and also an option to "Check Out" a sample while there for convenience.

Search:

Search By:
 Select All SampleID RackID Scan Station Name Site Storage Location Created By Last Updated By

Created Date: Last Updated Date:

File Export

Show entries Filter Results By:

SampleID	RackID	SlotNumber	Site	StorageLocation	CreatedBy	CreatedDate	LastUpdatedBy	LastUpdatedDate	ScanStationName
=W99991800020100	R-VAL0000067	1	Atlanta		Will Thomason	Wednesday, 06/24/2020 1:57:49 PM	Will Thomason	Wednesday, 06/24/2020 1:57:49 PM	
=W99991800020200	R-VAL0000067	2	Atlanta		Will Thomason	Wednesday, 06/24/2020 1:57:49 PM	Will Thomason	Wednesday, 06/24/2020 1:57:49 PM	

a.

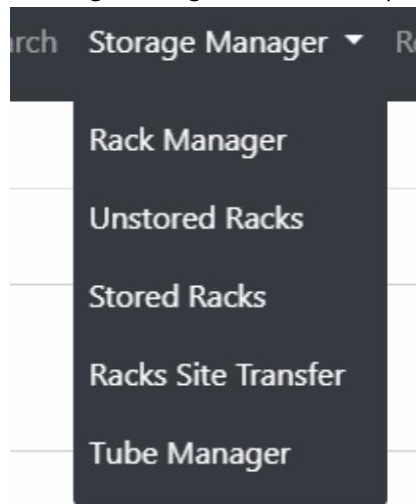
- 5) You may also export the contents to a file for further review, manipulation, or printing using the "File Export" option.

a.

Show entries

5.0 Storage Manager

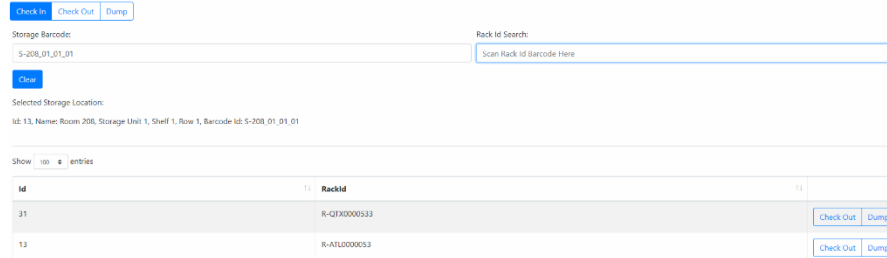
- 1) Click the “Storage Manager” link in the top menu bar.



- a.
 - b. You will be given the option to navigate to the Rack Manager, Unstored Racks, Stored Racks, Racks Site Transfer, and Tube 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

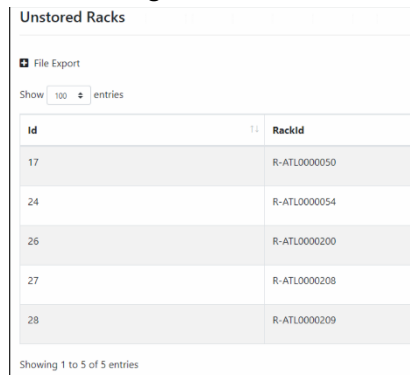
- i.
- b. To use the “Check In” option place the cursor in the “Storage Barcode:” field and begin scanning the storage location barcodes followed by the rack barcodes in your storage location. When you scan the next “Storage Location Barcode” the page will automatically update the new storage location 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.



- 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.

3) Unstored Racks

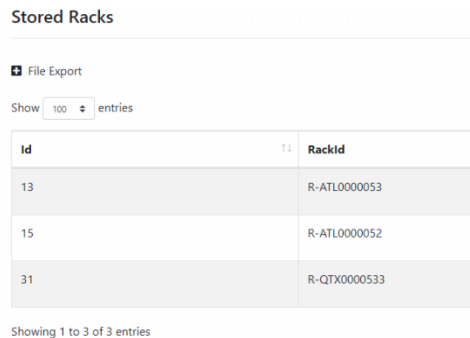
- a. In the “Unstored Racks” screen you can see racks that have been scanned, but never associated to a storage location.



i.

4) Stored Racks

- a. In the “Stored Racks” screen you can see racks that have been scanned and stored into a location.



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

Check In Check Out Dump

Rack Id Barcode: Test Tube Search:

Clear

Selected Rack:
No Rack Selected

Show entries

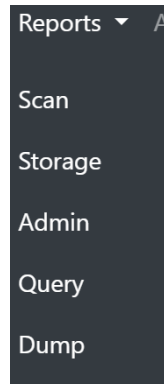
Id	SampleId	SlotNumber
No data available in table		

b. Showing 0 to 0 of 0 entries

- 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. The “Check Out” feature uses the same concept as “Check In” but indicates a tube has been removed from the scanned rack.
- e. The “Dump” Feature works similarly to “Check Out”, except it indicates that the tube has been dumped, destroyed, or otherwise no longer exists.

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	8-VL000001	Wednesday, 06/24/2020 1:57:40 PM	Will Thomason	will@ideticsolutions.com
Atlanta	8-VL000001	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

Site	RackID	StorageLocation	StorageLocationTree	Action	PerformedBy	EmailAddress	ActionDate
Atlanta	8-VL000001	Refrigerator 206	Refrigerator 206	CheckedTestTubeOut	Hilaris Unzueta	hilaris@ideticsolutions.com	Tuesday, 05/12/2020 12:36:06 PM
Atlanta	8-VL000001	Refrigerator 206	Refrigerator 206	CheckedRackIn	Hilaris Unzueta	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

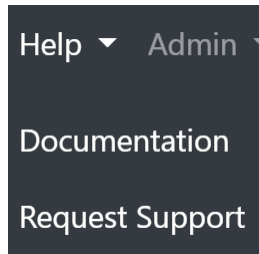
- a. When racks are dumped the ID’s are automatically queried against the system to find any samples that are still pending tests. The Dump Reports screen contains entries for each session of dumps and a list of samples that are still pending testing for each of the racks that were scanned. Do not review 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.

6.0 Help

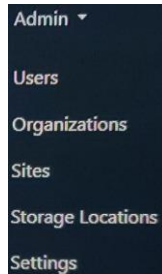
- 1) Click the “Help” drop down from the top menu bar



- 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.

Users

[Create New](#)

File Export

Show 100 entries Filter Results By: iDetic

Organization	DisplayName	EmailAddress	FirstName	LastName	IsAccountEnabled	
Demo	Robbie Ufford	robbie@ideticsolutions.com	Robbie	Ufford	false	Edit Details Enable Resend Invitation Delete

- 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 Last Name

Email Address Display Name
The Email Address field is required.

Organization

Site

Default Storage Location (Optional)

[Create](#)

- i. [Back to List](#)
- 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) 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	#1111ff		Edit Details Delete
13	Demo	TestPendingTubeColor	ABC	#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	#777777		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



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