

# User Manual



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LabLogs User's Manual v1.01

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## Logon and Logout

The user logon page is available from any internet-accessible device.

Steps to Logon:

- 1. In your internet browser go to app.lablogs.co
- 2. Use the registered email address for your account
- 3. Enter the password associated with your account

| Sign in to your account                |
|--|
| Password                               |
| Show password Forgot Password? SIGN IN |

4. Click Sign In or press Enter.



### Steps to Logoff:

1. Select the Menu bar.

| ard →      | TASKS     |              |         |               | ĺ      | Scan Barcode | UU |  |
|------------|-----------|--------------|---------|---------------|--------|--------------|----|--|
|            |           |              | N       | lon-Complianc | e 2281 |              |    |  |
| •          | Units:    | Show All     | Search: | Search        |        |              |    |  |
| View Maint | enance Lo | <u>295</u> ) |         |               |        |              |    |  |

### 2. Select Logout just below your name.

| Units:               | Show All | 1 | Search: | Search | REPORTS                                 | >                          |
|----------------------|----------|---|---------|--------|---|----------------------------|
|                      |          |   |         |        | ADMINISTRATION                          | >                          |
|                      |          |   |         |        | Logged in as:                           |                            |
| View Maintenance L   |          |   |         |        | SANDY STRICKLAND (ID:664)               | (Training Lab)             |
| - view wantenance co | 2927     |   |         |        | software by                             |                            |
|                      |          |   |         |        | Electronic Lab Logs<br>www.lablogs.co   | s, Inc.                    |
| - Chemistry          |          |   |         |        | Need Help? <u>Contact Us</u> or check o | out our <u>Help Docs</u> 🕧 |
|                      |          |   |         |        | Copyright @2021 - Electronic L          | ab Logs, Inc.              |

## Dashboard

This is the first screen you will see when you logon.

When you logon you will be directed to the Dashboard. You can also navigate to the dashboard by clicking on the menu in the top right corner and selecting Dashboard.

You will find the following information here.

The Tasks tab has the tasks that need attention first.

The Non-Compliance tab is where you will find any tasks that have been missed.

To narrow down the information that pertains to you, use the filters at the top. These filters will be saved for the next time you logon so you don't have to set them each time. These filters will also be saved as you navigate through the site.

You will also see the blue chat icon on the bottom right of the page. When you click on this it will take you to our intercom system. From here you can look up help articles or you can send us a message directly. The messages will go directly to the support team and you will get a prompt reply. If you close out of this window, it is ok, you will receive replies in your email.

## Reset, Forgot, or Change a Password

This may only be completed by the User

Steps to Reset/Change a User Password:

1. Select the Menu Button

| Tasks | DASHBOARD    | OARD 🔶 TASKS    |     |        | n-Compliance 2306 |   |  |
|-------|--------------|-----------------|-----|--------|-------------------|---|--|
| ×     | Departments: | Show All        | Ŧ   | Units: | Show All          | • |  |
|       | Tags: Enter  | a Tag           |     |        |                   |   |  |
|       |              |                 |     |        |                   |   |  |
|       | Acetone QC   | iew Instrument) | oas |        |                   |   |  |

2. Select your name in the Logged in as box



3. On the right of the page under Manage Account, select "Reset Password"

| USER   | Scan Barcode 🛄                 |
|--|--------------------------------|
| aylor (ID:847) ( <u>Edit</u> )                   | Manage Account                 |
| Intry Specialist<br>es                           | Reset Password<br>Disable User |
| ogs.co ( <u>Edit</u> )<br>Apr 14, 2023 15:14 UTC |                                |
| sites for Access                                 |                                |
| 2  |                                |
| ) Lab  |                                |
| Lab  |                                |
| nts  |                                |

4. Enter the old password and then the new password

|  | Reset 0        | User Password  | ×             | Scan Barcode 💵   |
|--|----------------|--|---------------|--|
| ert, Taylor (ID:8<br>e:<br>Data Entry Speciali<br>nin: Yes<br>@lablogs.co ( <u>Edit</u> )<br>.ogon: Apr 14, 202: | Taylor Gilbert | Reset Password<br>Old Password<br>Enter Old Password<br>New Password<br>Enter New Password |               | Manage Accoun<br><u>View User Activit</u><br><u>Reset Passworr</u><br><u>Disable Use</u> |
| ect the sites for Acc<br>All Sites<br>Training Lab<br>Off Site Lab<br>artments                                   |                | Cancel   | eset Password |  |

5. Select the Reset Password button

|                  |                | Reset Password        | View User Activity |
|------------------|----------------|-----------------------|--------------------|
| Intry Speciali   |                | Old Password          | Reset Password     |
| <del>3</del> 5   |                |                       | Disable User       |
| ogs.co (Edit)    | Taylor Gilbert | New Password          |                    |
| Apr 14, 2021     |                |                       |                    |
| sites for Acc    |                |                       |                    |
| 3<br>N J ab      |                | Cancel Reset Password |                    |
| Lab              |                |                       |                    |
| nts              |                |                       |                    |
| Departments      | for Access     |                       |                    |
| artments         |                |                       |                    |
| ology - Training | Lab            |                       |                    |
| ation - Training | Lab            |                       |                    |

1. From the Login home page enter the user ID

| Sign in to your account                |  |
|--|--|
| Password                               |  |
| Show password Forgot Password? SIGN IN |  |

2. When prompted to enter a password, click on the Forgot Password? Button

| Sign in to your account  |  |
|--|--|
| Password   |  |
| Show password Forgot Password? SIGN IN   |  |
| Copyright @2021 - Electronic Lab Logs, Inc.<br>LabLogs.co.Software<br><u>Belease 1 61 Mar 29, 2023</u> |  |



- 4. Check your email for the verification code
- 5. Enter Verification Code and New Password, then click Verify Code.

| Reset                 | our password                   |  |
|-----------------------|--------------------------------|--|
| Verification Code * - |                                |  |
| 315753                |                                |  |
| New Password *        |                                |  |
|                       |                                |  |
|                       |                                |  |
| Back to Cine In       |                                |  |
| Back to Sign in       | Verify CODE                    |  |
|                       |                                |  |
| Copyright @20         | 21 - Electronic Lab Logs, Inc. |  |
| Lab                   | .ogs.co.Software               |  |
| <u>1000</u> 3         | 101749-29-2023                 |  |
|                       |                                |  |
|                       |                                |  |
|                       |                                |  |

## Manage Your User Account

Setup, Edit and Change Notifications for your User Account

A user can set their desired notifications. You must have Administration access to set your or another user's access to Sites, Department, Bench/Units.

Steps to Manage Your User Account:

1. Select the Menu button in the top right hand corner of the screen.

| asks | 9            |          |   | N      | on-Compliance | 2306 |    |
|------|--------------|----------|---|--------|---------------|------|----|
| v    | Departments: | Show All | ~ | Units: | Show All      | -    |    |
|      | Tags: Enter  | a Tag    |   |        |               |      |    |
|      |              |          |   |        |               |      |    |
|      |              |          |   |        |               |      | L. |

2. Select your name.



3. Make desired changes.

#### 4. Select the Save button when complete.

POC Waived (not under CAP) - Training Lab
Point of Care - Off Site Lab

#### Notifications Settings

#### Frequency

- Immediately
- Receive Notifications as the occur
- Daily Summary
- You will Receive a Summary of activity Every Evening
- Weekly Summary
- You will Receive a Summary of activity Every Friday Evening

#### Sign-off Chains 🖪

This user is not associated with any Sign-off Chains



## **Create a PIN**

This is needed if you are on a sign off chain and sign monthly reports.

1. Select the Menu icon

|         |        |       |             |     |          | Scan Barcode      |    |  |
|---------|--------|-------|-------------|-----|----------|-------------------|----|--|
| 3       |        |       |             | Sig | Inatures | 2                 |    |  |
| Search: | Search | Tags: | Enter a Tag |     |          |                   |    |  |
|         |        |       |             |     | 1 Non C  | compliance Review | ws |  |

2. Click in the box that has your Name

|                |               |     |          | Scan Barcode 📗   |   |
|----------------|---------------|-----|----------|------------------|---|
| 1              |               | Si  | gnatures | 2                |   |
| Search: Search | Tags: Enter a | ſag |          |                  |   |
|                |               |     | 1 Non C  | ompliance Review | s |

3. Select "Create Pin" in the top right corner of the screen

| Scan Barcode   |
|--|
| Manage Account<br>View User Activity<br>Reset Password<br>Create Pin<br>Disable User |
|  |

### 4. Enter a 4 digit Pin

|     | Create a 4-digit User Pin          | ×   |
|-----|------------------------------------|-----|
| ger | New Pin *       Joann       Wilson |     |
|     | Cancel Create                      | Pin |
|     |                                    |     |

5. Confirm your Pin

|    | Create a 4-digit User Pin    | ×     |
|----|------------------------------|-------|
| er | New Pin *                    |       |
|    | Joann<br>Wilson Cancel Creat | e Pin |
|    |                              |       |

#### 6. Select "Create Pin"

|                 | New Pin *     |                  |  |
|-----------------|---------------|------------------|--|
| Joann<br>Wilson | Confirm Pin * | -9               |  |
| _               | Ca            | ancel Create Pin |  |
|                 |               |                  |  |
|                 |               |                  |  |

7. Select "Save" at the bottom of the screen



## Log a Scheduled Task

Steps to Log a Task:

1. Select "Instruments" from the menu

| OARD 🔶 TASKS                   | ×  |
|--------------------------------|--|
| Non-Compliance 2345            | DASHBOARD >                              |
|                                | INSTRUMENTS                              |
| Units: Show All Search: Search | REPORTS >                                |
|                                | ADMINISTRATION >                         |
|                                | Logged in as:                            |
|                                | L TAYLOR GILBERT (ID:847) (Training Lab) |
|                                | logout                                   |
| View Maintenance Logs          | software by                              |

2. Select the desired instrument



### 3. Select the needed task from the list

| Sort By | Status          | Default           | Frequency | A-Z |  |
|---------|-----------------|-------------------|-----------|-----|--|
|         |                 |                   |           |     |  |
| Task    | s               |                   |           |     |  |
| 1       | Record Temperat | ture °C           |           |     |  |
| 2       | Annual Thermom  | neter Calibration |           |     |  |
| 3       | Inspect Thermon | neter for Damage  |           |     |  |
| Othe    | er              |                   |           |     |  |
| 6       | Quatam Taak     |                   |           |     |  |

### 4. Fill in the necessary information

| Sort By | Status              | Default            | Frequency              | A-Z          |  |
|---------|---------------------|--------------------|------------------------|--------------|--|
|         |                     |                    |                        |              |  |
| Task    | S                   |                    |                        |              |  |
|         | Record Temperat     | ure °C             |                        |              |  |
| E       | Frequency: Daily, L | ead time 3 hrs, Ov | verdue after 5 hrs     |              |  |
|         | Femperature °C (a   | e °C               | 4.5 and 39.5) (View Ch | <u>nart)</u> |  |
| (       | Comments (optiona   | l)                 |                        |              |  |
|         | * Maximum 5000 cha  | racters allowed    |                        |              |  |
| 1       | Enter Comments      |                    |                        |              |  |

- 5. If the task fails, enter a required comment documenting corrective action.
- 6. Select "Mark as Complete" when finished

|   | 36       Image: Acceptable                               |
|---|--|
|   | Comments (optional)<br>* Maximum 5000 characters allowed |
| 1 | Enter Comments   |
|   | Completed By: Taylor Gilbert (ID:847)                    |
|   | Time completed: Apr 19, 2023 10:35 EDT( <u>Edit)</u>     |
|   | Mark as Complete No Testing Cancel                       |
|   | required fields above are not entered.                   |
| 2 | Annual Thermometer Calibration                           |

7. Repeat steps 1-5 to enter an acceptable value after logging a failed task.

Note: Tasks can be sorted by Status, Default, Frequency, A-Z.

The Default filter is established by an Administrator.

## Log an Unscheduled Task

1. Go to the "Instruments" page from the menu

| DAS       | HBOARD → TA |      |       |          |                           | ×              |
|-----------|-------------|------|-------|----------|---------------------------|----------------|
|           |             |      |       |          | DASHBOARD                 | >              |
|           |             |      |       |          | INSTRUMENTS               | >              |
| partments | : Show All  | 💌 Ur | nits: | Show All | REPORTS                   | >              |
| ags: Ent  | er a Tag    |      |       |          | ADMINISTRATION            | >              |
|           |             |      |       |          | Logged in as:             |                |
|           |             |      |       |          | SANDY STRICKLAND (ID:664) | (Training Lab) |
|           |             |      |       |          | software by               | logout         |

2. Select the needed instrument

| 0   | 0  | 0  |
|-----|--|--|
|     | 5  |  |
| у - | <b>Microdase Disc</b><br>Training Lab - Microbiology - Microbiology -<br>1 | MicroScan WalkAway 40<br>Training Lab - Microbiology - Microbiology -<br>534020328 |
|     | Up-to-date   | Up-to-date   |
| 0   | 6  | 0  |
|     |  |  |

3. The page will open on the "All Tasks" tab

|          |                      | MicroScan W<br>s/n: 5340203<br>ell id: 87<br>Barcode : ELL | <b>/alkAway 40</b><br>28<br>.130441 |                |         |
|----------|----------------------|--|-------------------------------------|----------------|---------|
|          |                      | Location : Tra<br>Type : MicroS<br><u>more info</u> ▶      | ining Lab - Microb<br>ican WalkAway | ology - Microb | biology |
|          |                      | All Tasks  |                                     |                |         |
| Document | ts (2) <u>show f</u> | iles •   |                                     |                |         |
|          |                      |  |                                     |                |         |

### 4. Select the unscheduled task that needs to be logged

| Sort By  | Status                | Default                   | Frequency | A-Z |  |
|----------|-----------------------|---------------------------|-----------|-----|--|
|          |                       |                           |           |     |  |
| Tasks    |                       |                           |           |     |  |
| 1 🖸      | Misc Repairs          |                           |           |     |  |
|          | Replace Printe        | r Ribbon                  |           |     |  |
|          | Maximum 5000 d        | nal)<br>haracters allowed |           |     |  |
|          | Enter Commen          | ts                        |           |     |  |
|          |                       |                           |           |     |  |
| 2        | empleted Du. 0        |                           | 004)      |     |  |
| <u>c</u> | <u>ompieted by:</u> S | andy Strickland (ID       | 004)      |     |  |

| <u> </u>                               | INSTRUMENTS 🔶 ALL TASKS |  |
|--|-------------------------|--|
| Other                                  |                         |  |
| Custom Task                            |                         |  |
| Description                            |                         |  |
| Enter Description                      |                         |  |
| Comments (option<br>* Maximum 5000 cha | al)<br>aracters allowed |  |
| Enter Comments                         |                         |  |

- 6. Fill in the necessary information
- 7. Select "Mark as Complete" when finished

| ""   |  |
|--|--|
| Comments (optional)  * Maximum 5000 characters allowed |  |
| Enter Comments   |  |
| Completed By: Taylor Gilbert (ID:847)                  |  |
| Time completed: Apr 19, 2023 10:42 EDT( <u>Edit</u> )  |  |
| Mark as Complete No Testing Cancel                     |  |
| required fields above are not entered.                 |  |
|  |  |

Note: Tasks can be sorted by Status, Default, Frequency, A-Z. The Default filter is established by an Administrator.

## How to Backdate a Task

If a user forgot to log a maintenance task, the date/time can be edited. The following steps will help you add an entry for a task that was not logged, but was completed according to regulation. Following these steps will fill in the hole on the maintenance log for this task. When you view the logs the task will be highlighted with a pale yellow color to note the date change. Provide a clear explanation for the date change as this will be recorded on the log as well.

1. Go to the "Instruments" page from the menu

| DASHE      | BOARD 🔶 T | ASKS   |          |                           | ×              |
|------------|-----------|--------|----------|---------------------------|----------------|
|            |           |        |          | DASHBOARD                 | >              |
|            |           |        |          | INSTRUMENTS               | >              |
| partments: | Show All  | Units: | Show All | REPORTS                   | >              |
| ags: Enter | a Tag     |        |          | ADMINISTRATION            | >              |
|            |           |        |          | Logged in as:             |                |
|            |           |        |          | SANDY STRICKLAND (ID:664) | (Training Lab) |
|            |           |        |          |                           | logout         |
|            |           |        |          | software by               |                |

2. Select the Instrument you need

|                     | INSTRUMENTS  | Scan Barcode                                   |
|---------------------|--|--|
| 0                   | 0  |  |
|                     |  |  |
| or .                | Incubator - Campy  | Incubator 1                                    |
| 3y - Microbiology - | Training Lab - Microbiology - Microbiology -<br>41217056 | Training Lab - Microbiology - Microb<br>123456 |
|                     | Up-to-date   | Up-to-date                                     |
| A                   | A  |  |

3. The page will open on the "All Tasks" tab

|         |        | Incubator - C<br>s/n: 41217056<br>ell id: 126<br>Barcode : ELL | <b>ampy</b><br>130435               |                  |       |  |
|---------|--------|--|-------------------------------------|------------------|-------|--|
|         |        | Location : Trai<br>Type : Incubat<br>more info<br>All Tasks    | ning Lab - Microb<br>or (41.5-42.5) | iology - Microbi | ology |  |
| Sort By | Status | Default  | Frequency                           | A-Z              |       |  |
|         |        |  |                                     |                  |       |  |

#### 4. Select the task that needs to be logged



5. Fill in the results

|   | Tasks   |
|---|---|
|   | Record Temperature (°C)   |
|   | Frequency: Daily, Lead time 3 hrs, Overdue after 5 hrs            |
|   | Temperature (°C) (acceptable: Between 41.5 and 42.5) (View Chart) |
|   | Enter Temperature (°C)  |
|   | Comments (optional)   |
|   | * Maximum 5000 characters allowed                                 |
| 1 | Enter Comments  |
|   |   |
|   | Completed By: Sandy Strickland (ID:664)                           |
|   |   |

6. Just above "Mark as Complete" you will see the time completed set to the current date and time, select the "Edit" button

|   | 42   | <ul> <li>Acceptable</li> </ul> |  |  |  |  |
|---|--|--------------------------------|--|--|--|--|
|   | Comments (optional) * Maximum 5000 characters al | lowed                          |  |  |  |  |
| 1 | Enter Comments                                   |                                |  |  |  |  |
|   | Completed By: Sandy Strickland (ID:664)          |                                |  |  |  |  |
|   | Time completed: May 02, 2023 1                   | 2:40 EDT(Edit)                 |  |  |  |  |
|   | Mark as Complete                                 | lo Testing Cancel              |  |  |  |  |
|   | required fields above are not entered.           |                                |  |  |  |  |
|   |  |                                |  |  |  |  |
|   | Annual Thermometer Cali                          | bration                        |  |  |  |  |

7. Fill in the date and time you completed the task



### 8. Provide a reason for the back dating

| Completed By: Sandy Strickland (ID:664)                |          |                          |  |  |  |  |
|--|----------|--------------------------|--|--|--|--|
| Date and Time Completed                                | ^        | ^                        |  |  |  |  |
| 04/28/2023   | 12 :     | 40 EDT ( <u>Cancel</u> ) |  |  |  |  |
| Reason (required)<br>* Maximum 5000 characters allowed | <b>~</b> | *                        |  |  |  |  |
| Provide a reason for the modified                      | cation   |                          |  |  |  |  |

9. Remember to select "Mark as Complete" when you are finished

| Completed By: Sandy Strickland (ID:664)             |          |                          |  |  |  |  |
|---|----------|--------------------------|--|--|--|--|
| Date and Time Completed                             | ^        | ^                        |  |  |  |  |
| 04/28/2023  | 12 :     | 40 EDT ( <u>Cancel</u> ) |  |  |  |  |
| Reason (required) * Maximum 5000 characters allower | <b>~</b> | ~                        |  |  |  |  |
| Forgot to log entry in system                       |          |                          |  |  |  |  |
|   |          |                          |  |  |  |  |

## **View Logged Tasks**

Review completed maintenance tasks.

Steps to View Tasks Completed:

1. Go to the "Instruments" from the menu

|    | DASHBOARD 🔶 TASK                   | S                     |                | ×         |
|----|------------------------------------|-----------------------|----------------|-----------|
| ks | 0                                  | Non                   | DASHBOARD      | >         |
|    |                                    |                       | INSTRUMENTS    | >         |
| -  | Departments: Show All              | Units: Show A         | REPORTS        | >         |
|    | Tags: Enter a Tag                  |                       | ADMINISTRATION | >         |
|    |                                    |                       | Logged in as:  | ning Lab) |
|    | cetone QC <u>View instrument</u> ⊁ | View Maintenance Logs | software by    | logout    |

#### 2. Select your instrument



### 3. Select the "Reports" tab

| D Max<br>In: CT 2120<br>II id: 152<br>ocation : Train<br>ype : BD MAX<br>hore info | ing Lab - Chemistry - Core Molecular  |  |
|--|---|--|
| II Tasks   |   | Add Service Report   |
| ation  | Calibrated Thermometer<br>Lot Number: Not Specified<br>Expiration Date: No Expiration | Positive Control<br>NATSARS(COV2)-ERC<br>Lot Number: Not Specified<br>Expiration Date: No Expiration |

### 4. Use the filters to narrow down your search

| INS                               | TRU   | MEN    | тз  | <b>→</b> F | EPO   | RTS   |      |    | l,      | Scan Baro |
|-----------------------------------|-------|--------|-----|------------|-------|-------|------|----|---------|-----------|
| All Tasks                         |       |        |     |            |       |       |      |    | Reports |           |
| ters<br>te Range: From 04/01/2023 | Го 0- | 4/08/2 | 023 |            | Appl  |       |      |    |         |           |
|                                   |       |        |     | C          | alen  | dar V | /iew | {  |         |           |
| Apr , 2023 < 🗩                    | 01    | 02     | 03  | 04         | 05    | 06    | 07   | 08 |         |           |
| Clean Barcode Scanner Wind        |       |        |     |            | (); • |       |      |    |         |           |
| Clean Racks between runs          |       |        |     |            |       |       |      |    |         |           |

To view Maintenance Logs select this link or see View Maintenance Logs.

## **Non-Compliance**

Options for correcting overdue tasks and Non-Compliance

When a task is overdue, it will show under the Non-Compliance tab on the Dashboard. When reviewing these tasks there are 4 options to resolve the issue.

It is recommended to complete all Non-Compliance tasks before completing scheduled tasks on the Dashboard.



#### Resolve (Fix the Hole)

Selecting Resolve "fill the hole" on the Maintenance Log. You will be required to enter when the task was actually completed and why it was overdue. This is generally used when a user completed the task but forgot to log it into LabLogs. When this is selected it will show as a date modification on the Maintenance Log.

1. Select the (Resolve Fix the Hole) button



#### 2. Enter Data

| Negative      | Small        | Mod               | derate   | L | arge | <ul> <li>Acceptable</li> </ul> |  |
|---------------|--------------|-------------------|----------|---|------|--------------------------------|--|
| Level 1 (acce | ptable: Smal | l) ( <u>Vie</u> v | v Chart) |   |      |                                |  |
| Negative      | Small        | Mod               | derate   | L | arge | <ul> <li>Acceptable</li> </ul> |  |
| Date and Tin  | ne Comple    | ted               | ^        |   | •    |                                |  |
| 04/12/2023    | 1            |                   | 06       | : | 59   | EDT                            |  |
|               |              |                   | v        |   | ¥    |                                |  |

3. Date/Time will default to the time the task should have been completed. Adjust the date and/or time if needed

| Level 2 (acce  | eptable: Large) ( | View Chart) |       |                                |  |
|----------------|-------------------|-------------|-------|--------------------------------|--|
| Negative       | Small N           | loderate    | Large | <ul> <li>Acceptable</li> </ul> |  |
| Date and Tin   | ne Completed      | ^           | ^     |                                |  |
| 04/12/2023     |                   | 10          | : 54  | EDT                            |  |
| Reason (requi  | red)              | v           | *     |                                |  |
| * Maximum 5000 | ) characters allo | wed         |       |                                |  |
| Provide a rea  | ison for the m    | odification |       |                                |  |

#### 4. Enter required comment

| Date and Time Completed       | ^         |   | ^  |     |  |
|-------------------------------|-----------|---|----|-----|--|
| 03/23/2023                    | 23        | : | 59 | EDT |  |
| Maximum 5000 characters allow | ed        |   |    |     |  |
| Provide a reason for the mod  | ification |   |    |     |  |

5. Select Mark as complete button. An amber checkmark will now show on the report.

| Date and Time Completed        | ^  | ^    |     |               |             |  |
|--------------------------------|----|------|-----|---------------|-------------|--|
| 04/07/2023                     | 00 | : 00 | EDT |               |             |  |
| ason (required)                | *  | *    |     |               |             |  |
| 1aximum 5000 characters allowe | d  |      |     |               |             |  |
|                                |    |      |     |               |             |  |
|                                |    |      |     |               |             |  |
|                                |    |      |     | ~             |             |  |
|                                |    |      |     | Mark as Compl | lete Cancel |  |
|                                |    |      |     | Mark as Compl | lete Cancel |  |
|                                |    |      |     | Mark as Compl | lete Cancel |  |

NT (No Testing)

Selecting NT will place a black dash on the Maintenance Log indicating this task did not need to be completed.

1. Select the (NT No testing) button. The task will go away and a black dash will now show on the report.

| A Non Compliance Revie  | W                           |                 |                |
|-------------------------|-----------------------------|-----------------|----------------|
| The double data Table O |                             |                 |                |
| Fixed Schedule Task -0  | IverDue Pre-Run Daily Tas   | <u>KS</u>       |                |
| Missed Date: Sep 16, 20 | 122 06:59 ED1               |                 |                |
| Fixed Schedule Frequer  | ncy :24 Hours, Start Time 0 | 17:00           |                |
|                         |                             | <b>a</b>        | ٨              |
| Resolve                 | NT                          | Ignore          | Confirm        |
| Fix The Hole            | No Testing                  | Ignore The Miss | Non Compliance |
| Fix The Hole            | No Testing                  | Ignore The Miss | Non Complianc  |

Ignore (Ignore the Miss)

An example of when this may be used is if the instrument went down for maintenance or wasn't in working order, but the status of the instrument was not changed in LabLogs. This will not count against monthly compliance percentages.

1. Select (Ignore the Miss) button
|              | A          | -               | •              |
|--------------|------------|-----------------|----------------|
| Resolve      | NT         | Ignore          | Confirm        |
| Fix The Hole | No Testing | Ignore The Miss | Non Compliance |

2. Enter a required comment

| You Can Ignore The Miss: It will NOT Count against your compliance<br>Percentages.<br>PLEASE NOTE: your log will still show a hole, but will be noted as an Override |
|--|
| To Ignore, Please Provide an Explanation(required):  • Maximum 5000 characters allowed   |
| Enter explanation  |
| Mark as Override Ca  |

3. Select Mark as Override. A black dash will now show on the report.

Ignore Disregard the Miss

You Can Ignore The Miss: It will NOT Count against your compliance Percentages.

PLEASE NOTE: your log will still show a hole, but will be noted as an Override

To Ignore, Please Provide an Explanation(required):

• Maximum 5000 characters allowed

"...1

Marke Override

Cancel

Confirm (Non Compliance)

This is for when a task was truly missed. This selection will mark against your compliance percentage. You will want to note why the task was missed and if there was a corrective action that went along with the miss.

1. Select (Confirm Non Compliance) button

#### Fixed Schedule Task -OverDue Pre-Run Daily Tasks

Missed Date: Sep 20, 2022 06:59 EDT

Fixed Schedule Frequency :24 Hours, Start Time 07:00



2. Enter a required Comment

# 

3. Select the Confirm button. A black X will now show on the report.



## What does "Affects Compliance" mean

LabLogs tracks the percentage of compliance by the instrument, bench, and department. When a task, that is required for an instrument or test, is missed it will lower the percentage of compliance.

# **Select Multiple Non-compliance Button**

Multiple Non-Compliance/Overdue tasks that need to be completed by Override, No Testing or Non-Compliance, use "Select Multiple" button.

Note: This feature is only available if there are 50 or less non-compliance tasks.

Steps to Select Multiple Non-Compliance Tasks.

1. Select the Non-Compliance tab from the Dashboard

| 0           |          |        | N        | on-Compliance [ | 17 |
|-------------|----------|--------|----------|-----------------|----|
| epartments: | Show All | Units: | Show All | -               |    |
| ags: Enter  | a Tag    |        |          |                 |    |

#### 2. Select the "Select Multiple" button

| Sites:  | Example Site x   | ▼ | Departmer | nts: | Show A | Ĩ   | V        | Units: | Show All |
|---------|------------------|---|-----------|------|--------|-----|----------|--------|----------|
| Search: | Search           |   | From:     | 04/0 | 1/2023 | To: | 05/01/20 | 23     | Apply    |
|         | Multiple         |   |           |      |        |     |          |        |          |
| Don     | Multiple         |   |           |      |        |     |          |        |          |
| A Non C | ompliance Review |   |           |      |        |     |          |        |          |

Fixed Schedule Task -OverDue Record Daily Temperature

### 3. Select the tasks you want to complete

| Override   | OR No Testing   | Confirm Non-Compliance                               |
|--|---|--|
| Warning: This  | action will affect all  | the items currently selected                         |
| Add an E   | xplanation (optional)   |  |
|  |   |  |
|  |   |  |
|  |   |  |
| Non Compliance   | Review  |  |
| Non Compliance   | • Review<br># P003) <u>View Instru</u>  | ment  View Maintenance Logs                          |
| Non Compliance<br>Freezer (Therm.<br>EQ038<br>Main Lab   | • Review<br># P003) <u>View Instru</u>  | ment  View Maintenance Logs                          |
| Non Compliance<br>Freezer (Therm.<br>EQ038<br>Main Lab   | e Review<br># P003) <u>View Instru</u>  | ment   View Maintenance Logs                         |
| Non Compliance<br>Freezer (Therm.<br>EQ038<br>Main Lab<br>Fixed Schedule T                     | e Review<br># P003) <u>View Instru</u><br>ask -OverDue <u>Reco</u>            | ment  View Maintenance Logs                          |
| Non Compliance<br>Freezer (Therm.<br>EQ038<br>Main Lab<br>Fixed Schedule T<br>Missed Date: Apr | Review # P003) <u>View Instru</u> ask -OverDue <u>Reco</u> 20, 2023 23:59 EDT | ment View Maintenance Logs V<br>rd Daily Temperature |

4. If all tasks are needed then select the "Select All" box

| _     |                                    |            |                       |            | 6      |
|-------|------------------------------------|------------|-----------------------|------------|--------|
| ites: | Example Site x                     | Department | s: Show All           | Units:     | Show A |
| arch: | Search                             | From:      | 04/01/2023 To:        | 05/01/2023 | Apply  |
|       | 11 Selected Items<br>Override OR N | lo Testing | Confirm Non-Compl     | iance      |        |
|       | Override OR N                      | lo Testing | Confirm Non-Compl     | tod        |        |
|       |                                    |            | terns currently selec |            |        |
|       | Add an Explanation                 | (optional) |                       |            |        |

5. Add an optional comment. It is recommended to add a comment if using the Override or Confirm Non-Compliance solution.

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| Search:        | Search                                 | From:                                     | 04/01/2023           | To:       | 05/01/2023      | Apply |
|----------------|--|---|----------------------|-----------|-----------------|-------|
| select all     | 2 Selected Items                       |   |                      |           |                 |       |
|                | Override OR                            | No Testing                                | Confirm Non          | -Compli   | ance            |       |
|                | Warning: This action                   | on will affect all th<br>ation (optional) | ne items current     | ly select | ed              |       |
| ☑ ▲ N          | ion Compliance Rev                     | ew  |                      |           |                 |       |
| Fr<br>EC<br>Ma | eezer (Therm. # P00<br>2038<br>ain Lab | 3) <u>View Instrum</u>                    | ent▶ <u>View Mai</u> | ntenanc   | <u>e Logs</u> ) |       |

6. Select which solution you would like to use. (Override, No Testing, or Confirm Non-Compliance)

# Add a Logger to a Maintenance Task

Note: An Administrator must have Enabled Open Logging for your facility for this feature to be available.

Open Logging allows a user to add a Person's name and badge ID (optional) as "Completed by". This is helpful especially in the Point of Care Setting. A Logger does not have a Username, or Password. Steps to add a Logger to a Maintenance Task:

1. Open the task you wish to complete.

| SULEY | Status          | Default        | Frequency | A-Z |  |
|-------|-----------------|----------------|-----------|-----|--|
|       |                 |                |           |     |  |
| Tasks |                 |                |           |     |  |
| 1 🖸   | Record Humidity |                |           |     |  |
|       |                 |                |           |     |  |
| 2 🖸   | Record Room Te  | mperature (°C) |           |     |  |

2. Enter results in the data fields (if applicable).

| Record Humidity                   |                                 |  |
|-----------------------------------|---------------------------------|--|
| Frequency: Daily, Lead time 3 hr  | rs, Overdue after 5 hrs         |  |
| Record % Humidity (acceptable: B  | Setween 10 and 85) (View Chart) |  |
| Enter Record % Humidity           |                                 |  |
|                                   |                                 |  |
| * Maximum 5000 characters allowed | 1                               |  |
| Enter Comments                    |                                 |  |
|                                   |                                 |  |
|                                   |                                 |  |
| Completed By:                     |                                 |  |

- 3. Under "Completed by", select the Logger needed by clicking the blue Select next to their name.
- 4. If the user isn't listed, "Select Add new User".

| Lots Used:<br>Glucose Test Strip - 12345<br>Control 1 - 11111 - Exp Aug 3<br>Control 3 - 33333 - Exp Aug | - Exp Aug 31, 2022 ( <u>Change</u> )<br>11, 2022 ( <u>Change</u> )<br>g 31, 2022 ( <u>Change</u> ) |          |
|--|--|----------|
| Enter High   |  |          |
| Low ( <u>View Chart</u> )<br>Enter Low   |  |          |
| Comments (optional)<br>* Maximum 5000 characters allowe  | d  |          |
| Enter Comments   |  |          |
| Completed By:  |  |          |
| Joann Wilson (ID:425)  |  | Selected |
| Billy Joe* (ID:13) Add new User  |  | Select   |
| Time completed: Aug 19, 2022 13:59 E   | edt ( <u>Edit</u> )  |          |
| Mark as Complete No Te<br>required fields above are not entered.   | esting Cancel  |          |

### 5. Add the person's Name and Badge ID (optional).

| i – T                  | 1 Add/Find Us     | ser                          | ×   | Scan Ba | arcode 🞚 |
|------------------------|-------------------|------------------------------|-----|---------|----------|
|                        | Enter             | Name of Person Logging       |     |         |          |
| Tasks                  |                   | First Name                   |     |         |          |
| Record Temperatu       |                   |                              |     |         |          |
| Frequency: Daily, Le   |                   | Last Name                    |     |         |          |
|                        |                   |                              |     |         | 08:51 ED |
| 3 hours before         |                   | Employee/Badge ID (optional) |     |         |          |
| Allowed: 3 hours early |                   |                              | hou | irs     |          |
|                        | Existing Users    |                              |     |         |          |
| Temperature (°C) (a    | No Existing Users | Found                        |     |         |          |

6. Select "Add User"

| 3 hours early                                   | employee/badge in (optional) | hours |  |
|---|------------------------------|-------|--|
|   | Existing Users               |       |  |
| erature (°C) (a                                 | No Existing Users Found      |       |  |
| ents (optional)<br>num 5000 chara<br>r Comments | Add User Cancel              |       |  |
| <u>eted By:</u>                                 |                              |       |  |
| Gilbert (ID:847)                                | Selected                     |       |  |
| new User  |                              |       |  |

### 7. Select "Mark as Complete"

|   | * Maximum 5000 characters allowed<br>Enter Comments   |
|---|---|
|   | Completed By:   |
|   | Sandy Strickland (ID:664) Selected                    |
|   | Add new User  |
|   | Time completed: Apr 26, 2023 11:37 EDT( <u>Edit</u> ) |
| ( | Mark as Complete No Testing Cancel                    |
|   | required fields above are not entered.                |
|   |   |

The task will record the Person's name ex: John Smith\* however, it will still show who was logged in at the time the task was completed.

#### Accu-Chek Inform II QC (-)/Log Details

| Aug 18 Aug 19,2022 Aug 20  |                |
|--|----------------|
| John Smith* (ID:14) Aug 19, 2022 14:06 EDT<br>Complete ✔   Perform QC (New Lot/Shipment) | Hide Details 🖍 |
| Complete Aug 19, 2022 14:06 EDT  | <b>a</b>       |
| Schedule Frequency: Unscheduled  |                |
| High: 110 (acceptable)   |                |
| Low: 40 (acceptable)   |                |
| Glucose Test Strip , Aug 19, 2022 13:59 EDT  |                |
| 12345 - Expires Aug 31, 2022   | *              |
| Control 1 , Aug 19, 2022 13:59 EDT   |                |
| 11111 - Expires Aug 31, 2022   | ~              |
| Control 3, Aug 19, 2022 13:59 EDT  |                |
| 33333 - Expires Aug 31, 2022   | ~              |
| 33333 - Expires Aug 31, 2022<br>* Logged in as : Joann Wilson (ID:425)                   | Ň              |

Add Comment Cancel

×

## **Changes to Database after Go Live**

Live Database change of configuration request

It is our top priority to keep your database configured as it is intended by the employees at your facility designated as LabLogs Administrators. The Administrators have either requested or have personally created specific configurations within the system to meet your organization's needs. Once your Database is Live, LabLogs will not perform changes within the Live Database without a written request from an Admin User, Project Lead, or the facility Manager. It is ideal the Admin user is also the Admin for the Department for which they are requesting a change.

These requests can be made by emailing support@lablogs.atlassian.net with a subject of "Live Change Request".

Please include specific details for the change requested to include:

- Site
- Department
- Instrument
- Task
- Frequency
- Screenshots are always welcomed

These requests will have a completion goal of 24-48 hours from the time of submission. Some requests may involve our IT engineers which may require additional time for completion. The LabLogs Support and Success teams will maintain communication with the requester if any delays are expected.

# **Instrument Status**

Online, Offline, Down for Maintenance, Retired, Unresolved Issue

LabLogs has several Instrument Statuses for each Instrument. You can change the instrument's status by following these steps.

Note: All triggered tasks should be addressed before placing an instrument in the "Offline" or "Retired" statuses. If not, and the instrument were to be brought back online in 1 year, then Non-Compliance events will generate for the triggered tasks that were not completed prior to the status change.

1. Go to the "Instruments" page from the menu



2. Click on the *i* in the top right corner of the instrument tile



3. In the box that pops up, click the dropdown arrow under "Change Status:"

|                  | Change Status: Accu-Chek Inform II QC (-)  | × | 1        | Scan I |
|------------------|--|---|----------|--------|
| w All<br>Enter a | Status: Online, No Problems<br>Change Status:<br>Online - No Problems, Testing Allowed |   | Show All |        |
| 0                |  | • |          |        |



### Below is an explanation of the difference between each and their functionality.

#### Online

This will be used during your day to day operations. Your instrument is operating as expected, testing is allowed, and all scheduled tasks will trigger at their appropriate time.

#### Down for Maintenance

This should be used when the instrument isn't operating as expected, you're waiting for a Vendor's Service Technician to arrive, and testing cannot be performed. Scheduled tasks are not required to be performed and more importantly, the notifications are triggered for those tasks on the dashboard or instruments page. When the instrument is returned to the Online status, the tasks will pick back up where they left off.

#### Retired

This status should be selected when an instrument has been taken out of service and will no longer be used by the facility. It does not delete the instrument or its previously logged tasks from the database but it does remove it from the instrument page. Tasks cannot be completed on the instrument.

All triggered tasks should be addressed before placing an instrument in the "Offline" or "Retired" statuses. If not, and the instrument were to be brought back online in 1 year, then Non-Compliance events will generate for the triggered tasks that were not completed prior to the status change.

### Offline

This status should be used on the instrument that isn't currently having maintenance, QC, or testing performed. Some examples are: Spare instruments, backup instruments, seasonal testing instruments. Scheduled tasks are not required to be performed and more importantly, the notifications are triggered for those tasks on the dashboard or instruments page. When the instrument is returned to the Online status, the tasks will pick back up where they left off. All triggered tasks should be addressed before placing an instrument in the "Offline" or "Retired" statuses. If not, and the instrument were to be brought back online in 1 year, then Non-Compliance events will generate for the triggered tasks that were not completed prior to the status change. Below are 2 examples of the functionality of the Down for Maintenance and Offline instrument statuses.

Example 1:

Instrument Down for Maintenance or Offline from Oct 4 through Oct 14

Daily Tasks, are now Due (Not Overdue)

Weekly Tasks are also now Due (not overdue) as they've elapsed the 7 day period

Monthly/30 Day Tasks are on the same cycle. If it was performed on Oct 2, it will be Due on Nov 2. Example 2:

Instrument Down for Maintenance or Offline from Oct 4 through Oct 7

Daily Tasks, are now Due (Not Overdue)

Weekly Tasks are not Due unless they would have been due in side the window it was down.

If Weekly Task was performed on Sept 29, the Task will be Due because it would have been due on the 6th.

If Weekly Task was performed on Oct 3, the Task will not be Due until Oct 10

Monthly/30 Day Tasks are on the same cycle. If it was performed on Oct 2, it will be Due on Nov 2.

#### **Summary of Examples**

If the task would have been due inside the window that it was down, it will be Due (but not Overdue) when brought back Online.

If the instrument was down inside of the window, it maintains the same schedule.

Unresolved Issue

This status will only be used by the LabLogs application. The application uses this status when there has been a failure of a task. When the task is acceptable again, the application will change the status back to Online automatically.

# Move an Instrument

When an instrument needs to be moved from one site, department, or bench to another, follow these steps to record this change.

Note: Before moving an instrument clear all non-compliance, complete any triggered tasks, and complete any backdating necessary. (Once moved a task cannot be backdated past the moved date)

Steps to Move an Instrument:

1. Select "Instruments" from the menu

|        |       |            |          |            |                                | ×        |
|--------|-------|------------|----------|------------|--------------------------------|----------|
|        |       | Non        | -Complia | ance       | DASHBOARD                      | >        |
|        |       |            |          |            | INSTRUMENTS                    | >        |
| Search | From: | 09/26/2023 | To:      | 10/26/2023 | REPORTS                        | >        |
|        |       |            |          |            | ADMINISTRATION                 | >        |
|        |       |            |          |            |                                |          |
|        |       |            |          |            | Logged in as:                  |          |
|        |       |            |          |            | A TAYLOR GILBERT (ID:498) (Tra | aining ) |
|        |       |            |          |            |                                | logout   |
|        |       |            |          |            | software by                    | 100      |

### 2. Select the instrument you need to move

|   | Up-to-date  |  |
|---|---|--|
| 0 | 0   |  |
|   | <b>Refrigerator</b><br>ED Lab - Chemistry - Chemistry |  |
|   | Up-to-date  |  |
| θ | 0   |  |
|   |   |  |

### 3. Select "more info"

|              |   |   |                      | INSTRUMENTS 🔶 |
|--------------|---|---|----------------------|---------------|
|              | Refriger<br>s/n: -<br>ell id: 32'<br>Location<br>Type : Re<br>more info | ator<br>I<br>: ED Lab - Chemistry<br>ofrigerator<br>2 | - Chemistry<br>Tasks |               |
| Sort By Stat | tus   | Default   | Frequency            | A-Z           |

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#### 4. Select "Move Device"



ell id: 321 Location : ED Lab - Chemistry - Chemistry Type : Refrigerator <u>more info</u>

Site: ED Lab Department: Chemistry Unit: Chemistry



Status: Online, No Problems - Testing Allowed Change Instrument Status

s/n: -

Maintenance Log Authentication:

5. Select the appropriate change from the drop-down menus

|                  | Move Device: Refrigerator (-)   | × |  |
|------------------|---|---|--|
| stry - Chemistry | Current:<br>Site: <b>ED Lab</b><br>Department: <b>Chemistry</b><br>Bench / Unit: <b>Chemistry</b><br>New Site<br>ED Lab |   |  |
|                  | Chemistry ~   |   |  |
|                  | New Bench /Unit<br>Chemistry ~  |   |  |
|                  | Comments  |   |  |

| Training Bench | ~ |   |          |  |  |
|----------------|---|---|----------|--|--|
| Comments       |   |   |          |  |  |
| Optional       |   |   |          |  |  |
|                | h |   |          |  |  |
|                |   | N | love Now |  |  |
|                |   |   |          |  |  |
|                |   |   |          |  |  |
|                |   |   |          |  |  |
|                |   |   |          |  |  |

# Add a Service Report

Service Reports or other PDF file attachments may be added to the instrument reports.

Steps to add a Service Report to an Instrument:

1. Select "Instruments" from the menu

| DASHBOARD 🔿 TASKS                                       |                       | × |
|---|-----------------------|---|
| Tasks 🔟   | DASHBOARD >           |   |
|   | INSTRUMENTS           |   |
| ow All 🗢 Departments: Show All 🗢                        | L REPORTS >           |   |
| Search Tags: Enter a Tag                                | ADMINISTRATION >      |   |
|   | Logged in as:         |   |
| Acetone QC View.Instrument ><br>View Maintenance Logs > | logout<br>software by |   |

2. Select the instrument that you need to add a report

| Show All Tas               | sk Status: Show All Tage      | s: Enter a Tag                      |
|----------------------------|-------------------------------|-------------------------------------|
| 0                          | 0                             |                                     |
|                            |                               |                                     |
| Acetone QC                 | Aerospray Gram Slide Stainer  | Amniotest                           |
| Training Lab - Chemistry - | Training Lab - Microbiology - | Training Lab - Point of Care - Poin |
| Chemistry - 1              | Microbiology                  | of Care                             |
| Overdue                    | Up-to-date                    | Tags: 123                           |
| ( Verde                    | op-to-date                    | Up-to-date                          |

3. Select "Add Service Report" button on the right of the page



4. Type a description of the report

|        | Add Service Report                                    |
|--------|---|
|        | Description (required)                                |
|        | * Maximum 5000 characters allowed                     |
|        | Describe the Service Report                           |
|        | Attach a File (optional)                              |
|        | Note : Maximum size of a single document is 20MB      |
| Docur  | Completed By : Taylor Gilbert (ID:847)                |
| Contro | Time completed: Apr 12, 2023 09:15 EDT( <u>Edit</u> ) |

#### 5. Attach the PDF file (optional)

|       | Description (required)   |  |
|-------|--|--|
|       | Maximum 5000 characters allowed  |  |
|       | ""   |  |
|       | Attach a File (optional)<br>Note : Maximum-size of a single document is 20MB |  |
| Docur | Completed By : Taylor Gilbert (ID:847)                                       |  |
| Contr | Time completed: Apr 12, 2023 09:15 EDT( <u>Edit</u> )                        |  |
|       |  |  |

### 6. Select "Save Report" when complete

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# **Manage Controls and Reagents Lots**

Scenarios for various Reagent, Cartridge and Control Examples

This article will help you identify various lot scenarios and how to manage each within the LabLogs System.

## Example 1 - Enter a New Shipment of the Same Lot



Please see our <u>How to Clone a Lot Article</u> if needed. Clone the lot and edit the Received Date of the lot.

## Example 2 - Multiples of the same Lot - Open Expiration Date

Multiple come in a pack and expire 7 days after opening.



This is similar to Example 1. When cloning the lot, edit the Open Expiration Date field. This date will override the Manufacturer's Expiration date unless it exceeds the Manufacturer's Date. Then the Manufacturer's Date will trigger the expiration status. When either date is passed, the Lot will obtain the "Expired" Status. If the lot is "Linked", the acceptable ranges of the lot will carry over into the cloned lot.

### **Example 3 - Container Lot Numbers**



The lot number can be entered as normal into the system. In the above image, each container has a "bottle lot" number that is unique to the bottle while the box has the Primary lot number. When opening a new bottle, a user could utilize the "Clone Lot" button and edit the "Other Identifier" field by entering the bottle lot number.

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## Example 4 - Kit (multiple items used to perform a test)





- Follow the steps in <u>Enter a New Reagent or Control</u> to create the lot from the Administration Page.
- 2. Be sure to place a check in the "Is a Kit" box.
- 3. The user will then be prompted to enter a Lot number and Expiration Date for each item within the kit. Each item's lot number is nested within the Kit Master Lot.
- 4. The "Clone Lot" button can be used to record multiple shipments, etc of the same lot.

### Example 5 - Linked Kit (multiple items used to perform a test)



Components within the kit have numeric acceptable ranges that vary per lot number. This example includes cartridges, Controls and Calibrators. Each control and calibrator have an acceptable value that changes per lot number. It is recommended to create the kit and "Link" the Tasks to the Kit. (Perform Control L1, Perform Calibration S1, etc.). See <u>Add a Maintenance Task that</u> <u>is Linked to a Reagent or Control for assistance</u>.

## Lot Statuses

This article will help you understand the different statuses of lots.

When you enter a "Date Opened" you will see this status. Note: "Opened Expiration" does not show a status.

| Edit Controls/Reagents ESR Chex Level 1                     |  | ×   |
|---|--|-----|
| Available Lots: 📀 Add New                                   | ✓ Hide Expired Lots ✓ Hide Retired Lot | ots |
| <ul> <li>8971563 - Expires Mar 31,</li> <li>2024</li> </ul> | Clone Lot Edit Lot Retire Lot Select   |     |
|   |  |     |

When you enter a "Date in Use" you will see this status.

| Edit Controls/Reagents ESR Chex Level 1                  | ×                                       |
|--|---|
| Available Lots: 📀 <u>Add New</u>                         | ✓ Hide Expired Lots ✓ Hide Retired Lots |
| 8971563 - Expires Mar 31,<br>2024<br>Received 03/06/2023 | Clone Lot Edit Lot Retire Lot Select    |

This status shows that the control/reagent will expire in 3 days. The status will give you a notice and countdown for 7 days before the expiration when an expiration date has been entered.

| Edit Controls/Reagents ESR Chex Level 1                               |   |  |  |  |  |  |  |
|---|---|--|--|--|--|--|--|
| Available Lots: 📀 Add New   | ✓ Hide Expired Lots ✓ Hide Retired Lots |  |  |  |  |  |  |
| <ul> <li>8971563 - Expires Mar 27, 2023</li> <li>Clone Lot</li> </ul> | Edit Lot Retire Lot Select              |  |  |  |  |  |  |
|   |   |  |  |  |  |  |  |

On the final day of expiration the status will look like this.

| Edit Controls/Reagents ESR Chex Level 1   |           |          |                |              | ×    |
|---|-----------|----------|----------------|--------------|------|
| Available Lots: 📀 Add New   |           | ✓ Hide   | Expired Lots 🗸 | Hide Retired | Lots |
| <ul> <li>8971563 - Expires Mar 24,</li> <li>2023</li> <li>Lots about to expire Today</li> </ul> | Clone Lot | Edit Lot | Retire Lot     | Select       |      |
|   |           |          |                |              |      |

Once the control/reagent has expired the status will look like this. You will not see it on the list of lots available unless you uncheck the Hide Expired Lots box as in this example.

|                           | Edit Controls/Reagents ESR Chex Level 1                  |         |  |           |          |              |              | ×      |
|---------------------------|--|---------|--|-----------|----------|--------------|--------------|--------|
| Available Lots: 😝 Add New |  |         |  |           | Hide     | Expired Lots | Hide Retired | d Lots |
| Þ                         | 8971563 - Expires Mar 22,<br>2023<br>Received 03/06/2023 | Expired |  | Clone Lot | Edit Lot |              | Select       |        |

When you enter a "Discarded Date" will see this status. When your lot is discarded the Controls/Reagents box for that lot will turn pink.

| Edit Controls/Reagents ESR Chex Level 1                       |   | × |
|---|---|---|
| Available Lots:      Add New       New Features               | ⑦ ☑ Hide Expired Lots ☑ Hide Retired Lots |   |
| <ul> <li>8971563 - Expires April 30,</li> <li>2023</li> </ul> | New Clone Lot Edit Lot Retire Lot Select  |   |
|   |   |   |

# **Enter a New Reagent or Control Lot**

Follow these steps to add a new lot number to your instrument

1. Go to the "Instruments" page from the menu

| ASHBOARD | TASK | S      |          |      |                           | ×           |
|----------|------|--------|----------|------|---------------------------|-------------|
|          |      |        |          |      | DASHBOARD                 | >           |
|          |      |        |          |      | INSTRUMENTS               | >           |
| Show All |      | Units: | Show All | ▼ Se | REPORTS                   | >           |
|          |      |        |          |      | ADMINISTRATION            | >           |
|          |      |        |          |      |                           |             |
|          |      |        |          |      | Logged in as:             |             |
|          |      |        |          |      | SANDY STRICKLAND (ID:457) | (Training ) |
|          |      |        |          |      |                           | logout      |
|          |      |        |          |      | software by               |             |

2. Select the instrument you are working with



3. Select "Edit Lot" under the Reagent/Control you need to add to

|   | more info |           |     |  |
|---|-----------|-----------|-----|--|
|   | All Tasks |           |     |  |
| Controls/Reagents          Kit ⑦         Lot Number: 1         Expiration Date: Aug 31         ⑨ Expired         ✓ Edit Lot | , 2023    |           |     |  |
| By Status   | Default   | Frequency | A-Z |  |

4. Check to see if the Lot you need to enter is already entered, if not select "+ Add New"

| e       | Edit Controls/Reagents Kit  |  |
|---------|-----------------------------|--|
|         | Available Lots:             |  |
|         | No Lots found at this time. |  |
| _       |                             |  |
|         |                             |  |
| Control | s/Reagents                  |  |
| Kit     |                             |  |
| Lot N   | umber: 1                    |  |

5. Fill in the necessary information

| <u>୧</u> |                     |                    |     |               |        |
|----------|---------------------|--------------------|-----|---------------|--------|
| -1       | 🖍 Edit Controls/R   | eagents <b>Kit</b> |     |               |        |
|          | Add New Lot:        |                    |     |               |        |
| ų.       | Lot Number :        |                    | Dat | te Received:  | (optic |
|          | Expiration Date:    | (optional)         | Dat | te Opened :   | (optic |
|          | Opened Expiration : | (optional)         | Dat | te in Use:    | (optic |
|          | Other Identifier:   | (optional)         | Dat | te Discarded: | (optic |
| Controls | Manufacturer :      | (optional)         | Pro | oduct # :     | (optic |
| Kit C    | Description :       |                    | i.  |               |        |
## 6. Select "Save" when finished

| Other Identifier : | (optional) |      |        | Report |
|--------------------|------------|------|--------|--------|
|                    |            |      |        |        |
| Other Identifier : | (optional) |      |        |        |
|                    |            | Save | Cancel |        |

7. Select "Select" beside the lot you want active

|           |           |              |                 | ×            | ■ |
|-----------|-----------|--------------|-----------------|--------------|---|
|           | 1 Vide Ex | pired Lots 🗹 | Hide Retired Lo | ts           |   |
| Clone Lot | Edit Lot  | Retire Lot   | Select          |              |   |
|           |           |              |                 |              |   |
|           |           |              |                 |              |   |
|           |           |              | + Add Sei       | rvice Report |   |
|           |           |              |                 |              |   |

# How to Clone a Lot

Cloning a Lot can save users time and prevent data entry errors.

Cloning lots can be used in several situations. Receiving a New Shipment of an existing lot, opening a new vial of control with an open expiration date, etc. Please review our <u>Manage Control/Reagent lots</u> article for more examples. (Note: A retired lot cannot be cloned.)

This example will walk you through cloning a lot to enter a New Received Date for a New Shipment.

- 1. Navigate to the Instrument page and select the Instrument you need.
- 2. Click "Edit Lot" for the Control/Reagent.

| Example    | 1                                |         |           |     |
|------------|----------------------------------|---------|-----------|-----|
| Expiration | oer: 123<br>h Date: Mar 31, 2023 |         |           |     |
| A Lots a   | bout to expire in a we           | ek      |           |     |
| C In Use   |                                  |         |           |     |
| Ed)        | Lot                              |         |           |     |
|            |                                  |         |           |     |
|            |                                  |         |           |     |
| _          |                                  |         |           |     |
| ort By     | Status                           | Default | Frequency | A-Z |
| ort By     | Status                           | Default | Frequency | A-Z |

3. Click here to expand the lot information (if needed).



```
LabLogs User's Manual v1.01
```

## 4. Click "Clone Lot"

| ents Ex   | ample 1                        |                   |                                     |
|-----------|--------------------------------|-------------------|-------------------------------------|
| 0 Days    |                                |                   |                                     |
| <u>W</u>  |                                |                   | Hide Expired Lots Hide Retired Lots |
| 023       | Lots about to expire in a week | Clone L           | ot Edit Lot Retire Lot Select       |
| 3         |                                | Other Identifier: |                                     |
| ar 24, 20 | 23                             | Expiration Date:  | Mar 31, 2023                        |
|           |                                | Date Opened :     | Mar 24, 2023                        |
| ar 24, 20 | 23                             | Date Discarded:   |                                     |
|           |                                | S 1 1 1           | 0544305                             |

## 5. Click the "Date Received" field.

| s/n: 123456                       | Notes :              |                                 |                   |
|-----------------------------------|----------------------|---------------------------------|-------------------|
| ell id: 342                       | QC each Lot, Shipmer | nt, & 30 Days                   |                   |
| Type : Example Instr<br>more info | ume clone Lot:       |                                 |                   |
|                                   | Lot Number :         | 123                             | Other Identifier: |
|                                   | Date Received:       | 03/24/2023                      | Expiration Date:  |
|                                   | Opened Expiration :  | (optional)                      | Date Opened :     |
|                                   | Date in Use:         | 03/24/2023                      | Date Discarded:   |
|                                   | Manufacturer :       | Example Manufacturer            | Product # :       |
| 1, 2023                           | Description :        | Qualitative Test - 25 tests/box |                   |
| епта week                         | Files Add new        |                                 |                   |

## 6. Select the Received Date for the New Shipment.

| Opened Expira | ۲   | N   | larch |     | 202 | 3   | >   | Date Opened :  | 03/24/202    |
|---------------|-----|-----|-------|-----|-----|-----|-----|----------------|--------------|
| Date in Use:  | Sun | Mon | Tue   | Wed | Thu | Fri | Sat | Date Discarded | : (optional) |
| Manufacturer  | 26  | 27  | 28    | 1   | 2   | 3   | 4   | Product # :    | 2514795      |
| Description : | 5   | 6   | 7     | 8   | 9   | 10  | 11  |                |              |
| Files Add a   | 12  | 13  | 14    | 15  | 16  | 17  | 18  |                |              |
| Files Add h   | 19  | 20  | 21    | 22  | 23  | 24  | 25  |                |              |
|               | 26  | 27  | 28    | 29  | 30  | 31  |     |                |              |
|               | 2   | 3   | 4     | Б   | 6   | 7   | 8   |                |              |
| Freque        | псу |     |       | ŝ   | A-Z |     |     |                |              |
|               |     |     |       |     |     |     |     |                |              |

7. Edit all optional fields within the lot to match the details for this shipment.

| 011111212-004- |                   |            |  |
|----------------|-------------------|------------|--|
|                |                   |            |  |
|                |                   |            |  |
|                |                   | (          |  |
|                | Other Identifier: | (optional) |  |
|                | Expiration Date:  | 03/31/2023 |  |
|                | Date Opened :     | 03/24/2023 |  |
|                | Date Discarded:   | (optional) |  |
| urer           | Product # :       | 2514795    |  |
| 25 tests/box   |                   |            |  |

8. Click "Save"

| Date Discarded: | (optional) |      |        |   |  |
|-----------------|------------|------|--------|---|--|
| Product # :     | 2514795    |      |        |   |  |
|                 |            |      |        |   |  |
|                 |            |      |        |   |  |
|                 |            |      |        | - |  |
|                 |            | Save | Cancel |   |  |
|                 |            |      |        |   |  |
|                 |            |      |        |   |  |
|                 |            |      |        |   |  |
|                 |            |      |        |   |  |
|                 |            |      |        |   |  |

9. The cloned lot with the New Received Date appears at the bottom of the list. You can Click the arrow to expand the lot details.



10. Notice the new Received Date and other edited details.

|                  | Ð     | 123 - Expires Mar 3<br>Received 03/24/2023 | 31, 2023           | <ul> <li>▲ Lots about to expire in a week</li> <li>☑ In Use</li> </ul> | Clo                               |
|------------------|-------|--|--------------------|--|-----------------------------------|
|                  | Ø     | 123 - Expires Mar 3<br>Received 03/25/2023 | 31, 2023           | Lots about to expire in a week   | Clo                               |
| /ar 31, 2023     |       | Lot Number :<br>Date Received:             | 123<br>Mar 25, 202 | 3  | Other Identific<br>Expiration Dat |
| expire in a week |       | Date in Use :                              | Mar 24, 202        | 3  | Date Discarde                     |
|                  |       | Manufacturer :                             | Example Ma         | nufacturer   | Product # :                       |
|                  |       | Description :                              | Qualitative 1      | est - 25 tests/box   |                                   |
| atus De          | fault |  |                    |  |                                   |

11. Click "Select" to make this Shipment your Used or Linked lot for completing Tasks.

|     |                 | 🛛 Hide       | Expired Lots | Hide Retired Lo | us and the second se |
|-----|-----------------|--------------|--------------|-----------------|---|
| k   | Clone Lo        | ot Edit Lot  | Retire Lot   | Select          |   |
| sk  | Clone Lo        | ot Edit Lot  | Retire Lot   | Select          | + Add Service F   |
| Ot  | her Identifier: |              |              |                 |   |
| Exp | piration Date:  | Mar 31, 2023 | 3            |                 |   |
| Da  | te Opened :     | Mar 24, 2023 | 3            |                 |   |
| Da  | te Discarded:   |              |              |                 |   |
| Dre | aduct # -       | 2514705      |              |                 |   |

# How to Retire a Lot

Follow these steps to "Retire" a lot that has expired or that you no longer need.

# NOTE: This action can not be undone.

1. Go to the "Instruments" page from the menu

|        |       |             |  | ×         |
|--------|-------|-------------|--|-----------|
| 3      |       |             | Si DASHBOARD                                     | >         |
|        |       |             | INSTRUMENTS                                      | >         |
| Search | Tags: | Enter a Tag | REPORTS  | >         |
|        |       |             | ADMINISTRATION                                   | >         |
|        |       |             |  |           |
|        |       |             | Logged in as:<br>L TAYLOR GILBERT (ID:847) (Trai | ning Lab) |
|        |       |             |  | logout    |
|        |       |             | software by                                      |           |

#### 2. Select the desired instrument

| 0           | •<br>Acetone QC  |  |
|-------------|--|--|
| CLIA Waived | Training Lab - Chemistry - Chemistry - 1<br>Up-to-date |  |
| 0           | 0  |  |

|         |           | Biorex Labs K-Cher<br>Lot Number: 2<br>Expiration Date: Aug<br>▲ Lots about to exp<br>✓ Edit Lot | ck Serum Controls<br>3 31, 2023<br>hire in a week |  |
|---------|-----------|--|---|--|
| Default | Frequency | A-Z  |   |  |
|         |           |  |   |  |

4. Under Available Lots, select "Retire Lot" beside the lot you need to retire

| eck Serum Controls  |          |            |            |                              | >            | < |  | Scan Ba  |
|---------------------|----------|------------|------------|------------------------------|--------------|---|--|----------|
|                     |          | 🕑 🗹 Hide I | Expired Lo | ts 🗹 Hide F                  | Retired Lots |   |  |          |
| xpire in a week 🕜 C | lone Lot | Edit Lot   | Retire L   | ot Sel                       | ect          |   |  |          |
|                     |          |            |            |                              |              | ĺ |  |          |
|                     |          |            |            |                              |              |   |  | + Add Se |
| Serum Controls      |          |            | C          | ertified Tin<br>ot Number: ' | ner<br>123   |   |  |          |

## 5. You may then enter a comment in the box (optional) then select "Retire Lot"

|           |     | NOT | TE: This a | ction ca | nnot b | e undo | one. |   | 0.4 |  |
|-----------|-----|-----|------------|----------|--------|--------|------|---|-----|--|
|           | ""  |     | Retire L   | ot       | Ci     | ancel  |      | h |     | Certifie<br>Lot Num<br>Expiratio<br>Lots a |
| Frequency | A-Z |     |            |          |        |        |      |   |     |  |
|           |     |     |            |          |        |        |      |   |     |  |
|           |     |     |            |          |        |        |      |   |     |  |
|           |     |     |            |          |        |        |      |   |     |  |

# **View Maintenance Logs**

This will appear similar to the paper logs you used to use.

There are a couple ways to view the logs, here is one way. Steps to View Instrument Logs:

1. Select "Reports" from the menu

| DASHBOARD 🔿 TASKS                                       | ×                     |
|---|-----------------------|
| Tasks 🛐   | DASHBOARD >           |
|   | INSTRUMENTS           |
| ow All 💌 Departments: Show All 💌                        | L REPORTS >           |
| Search Tags: Enter a Tag                                | ADMINISTRATION >      |
|   | Logged in as:         |
| Acetone QC View Instrument ><br>View Maintenance Logs > | logout<br>software by |

2. On the left of the page select "Maintenance Logs"

| e                  | MONTHLY REPORTS Scan Barco |
|--------------------|----------------------------|
| Monthly Reports    | Filtere                    |
| Maintenance Logs   | Sites: Show All            |
| Sites              | Departmenter Show All      |
| Departments        | Departments: Show All      |
| Benches / Units    | Showing All Reports        |
| Instruments        | March 2023                 |
| Users              | 1 Blood Bank Training Lab  |
| Compliance Reviews | Report not Created         |

## 3. Use the filters, to narrow down the list of instruments

| MAINTENANCE LO           | GS REP  | DRT           |        |          |         |            |       | Scan Barco |
|--------------------------|---------|---------------|--------|----------|---------|------------|-------|------------|
|                          |         | Mainten       | ance   | Logs     |         |            |       |            |
| ing Lab 🗸 Departments:   | Hematol | ogy           | ~      | Benches, | /Units: | Hematolog  | у ~   |            |
| Show All                 | ~       | Date Range: F | rom 05 | /01/2023 | То      | 05/31/2023 | Apply | Expor      |
| istrument 1 of 10 Next > |         |               |        |          |         |            |       |            |

4. Select "Apply" to apply the filters

|        | Filter  | rs                                 |              |                    |            |                           |
|--------|---|------------------------------------|--------------|--------------------|------------|---------------------------|
| ments: | Hematology  | <ul> <li>Benches/Units:</li> </ul> | Hematology   | ~                  |            |                           |
|        | ✓ Date Range: From  | 04/01/2023 To                      | 04/30/2023   | Apply              | Export Dat | ta                        |
| ext >  |   |                                    |              |                    |            |                           |
| 5. \$  | Select "Next" until you see th  | ne needed instrum                  | ent logs     | (                  | No da      | ita                       |
| 5 🕨    | Sites: Training   | g Lab 🗸 Departmen<br>Show All      | nts: Hematol | ogy<br>Date Range: | From 04    | Benches/Un<br>/01/2023 To |
| ₩S     | < Previous Instru<br>I.Gastroccult a<br>Serial #: -<br>Bench/Unit: Hem<br>0 | ument 1 of 10 Next                 | 0            | O                  |            |                           |

# View Recent Logs, Failures, Date Modifications, or Service Reports

Steps to View a Recent Log, Failure, Date Modification or Service Report:

| DASHBOARD 🔶 TASKS                | ×                     |
|----------------------------------|-----------------------|
| Tasks 🔟                          | DASHBOARD >           |
|                                  | INSTRUMENTS           |
| ow All 🗢 Departments: Show All 🗢 | REPORTS               |
| Search Tags: Enter a Tag         | ADMINISTRATION >      |
|                                  | Logged in as:         |
| Acetone QC View Instrument >     | logout<br>software by |

1. Go to the "Instruments" page from the menu

2. Select your Instrument



3. Select the "Reports" tab

| A<br>S<br>E<br>L<br>L<br>T                        | In: 1<br>Il id: 157<br>ocation : Train<br>ype : Acetone<br>nore info | ing Lab - Chemistry - Chemistry<br>QC   |  |
|---|--|---|--|
| All Ta  | asks   |   | Reports  |
| eagents   |  |   | + Add Service Report   |
| c Tablets New Fo<br>ber: 123<br>In Date: No Expir | eatures  | Biorex Labs K-Check Serum<br>Controls<br>Lot Number: 1234<br>Expiration Date: No Expiration | Certified Timer<br>Lot Number: 12345<br>Expiration Date: No Expiration |

4. Use the filters to set the desired Date Range

| Type : Acetor<br>more info             | ne QC | ;      |     |      |       |    |    |    |    |        |    |    |   |
|--|-------|--------|-----|------|-------|----|----|----|----|--------|----|----|---|
| All Tasks                              |       |        |     |      |       |    |    |    | Re | eports |    |    |   |
| Filters<br>Date Range: From 04/01/2023 | Γο Ο  | 4/30/2 | 023 |      | Appl  | y  |    |    |    |        |    |    |   |
|  |       |        | Cal | enda | r Vie | w  |    |    |    |        |    |    |   |
| <b>Apr</b> , 2023 < 🔊                  | 01    | 02     | 03  | 04   | 05    | 06 | 07 | 08 | 09 | 10     | 11 | 12 | 1 |
| Perform Biorex Lab QC (3 Lev           |       |        |     |      |       |    |    |    |    | •      |    | ×  |   |
|  | _     |        |     |      |       |    |    |    |    |        |    |    |   |

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3. Select the Sites tab.

#### Revision Date: Nov 3, 2023

# Add Sites

This may only be viewed by administration.

#### \*\*\* WARNING \*\*\*

The TimeZone Feature is intended to be used during Implementation and adding a New Site. Do NOT make this change for any sites that already are Live and have completed monthly reports. For more details, please contact support.

Steps to view/edit the sites using LabLogs in your network:

- 1. Logon as Administrator
- 2. Navigate to the Administration section from the Menu

| OARD 🔶 TASKS                     | ^                                      |
|----------------------------------|--|
|                                  | DASHBOARD >                            |
|                                  | INSTRUMENTS >                          |
| Units: Show All Search: Search:  | REPORTS >                              |
|                                  | ADMINISTRATION                         |
|                                  |  |
|                                  | Logged in as:                          |
|                                  | Laylor Gilbert (ID:847) (Training Lab) |
|                                  | logout                                 |
| ▶ <u>View Maintenance Logs</u> ▶ | software by                            |

| ADMII               | N 🔶 SITES                    |
|---------------------|------------------------------|
| Departments & Units | Instruments                  |
|                     |                              |
|                     |                              |
|                     |                              |
|                     |                              |
|                     |                              |
|                     | ADMII<br>Departments & Units |

## 4. Select the +Add Sites button

| MIN 🔶 SITES |       | Scan Barcode 🎹            |
|-------------|-------|---------------------------|
| Instruments | Users | System                    |
|             | Last  | 90 Days Compliance   100% |
|             | Las   | t 90 Days No data         |
|             |       |                           |

- 5. Enter Information.
- 6. Select Correct TimeZone

| C                         |   | ADMIN 🔶 SITES |
|---------------------------|---|---------------|
| Sites                     | Departments & Units   | Instruments   |
| Edit Site                 |   |               |
| Site Name                 | SC Regional   |               |
| Address                   | 123 Main St   |               |
| City                      | Amzazingville   |               |
| State                     | NC  |               |
| Zip                       | 28472   |               |
| Country                   | United States ~   |               |
| Phone                     | +1 ~ 910-274-0000   |               |
| Timezone                  | ✓ America/New_York  |               |
| Logging Schedule 🗹 Follow | America/Los_Angeles<br>America/Chicago  |               |
| Su Mo                     | America/Detroit<br>America/Phoenix<br>America/Denver<br>America/Boise   | Sa            |
| ON ON                     | America/Anchorage<br>Pacific/Honolulu   | ΟΝ            |
| Save Cancel               | America/Adak<br>America/Anguilla<br>America/Antigua<br>America/Araguaina<br>America/Aruba<br>America/Asuncion |               |

7. Select Save

| Zip     |           |           | 12345     |          |          | J  |    |  |
|---------|-----------|-----------|-----------|----------|----------|----|----|--|
| Country |           |           | United    | d States | ~        | ]  |    |  |
| Phone   |           |           | +1        | ~ (123)  | 456-789( |    |    |  |
| Timezon | e         |           | Ameri     | ca/New_Y | ork ~    | ]  |    |  |
| Loggin  | g Schedul | e 🗹 Follo | ow System | Schedule |          |    |    |  |
|         | Su        | Мо        | Tu        | We       | Th       | Fr | Sa |  |
|         | ON        | ON        | ON        | ON       | ON       | ON | ON |  |
| Save    | Cancel    |           |           |          |          |    |    |  |

# **View/Edit Sites**

This may only be viewed by administration.

#### NOTE:

Timezones are associated with the Sites instead of being set at the account level. \*\*\* WARNING \*\*\*

The TimeZone Feature is intended to be used during Implementation.

Do NOT make this change for any sites that already are Live and have completed monthly reports. For more details, please contact support.

Steps to view/edit the sites using LabLogs in your network:

- 1. Logon as Administrator
- 2. Navigate to the Administration section from the Menu



3. Select the Sites tab.

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|                                | ADMIN 🔶             | SITES       | Scan B         |
|--------------------------------|---------------------|-------------|----------------|
| Sites                          | Departments & Units | Instruments | Users          |
| <ul> <li>Site Lists</li> </ul> |                     |             |                |
| Training Lab                   |                     |             | Last 90 Days 📿 |
| Off Site Lab                   |                     |             | Last 90 Days 🤇 |

4. Choose the Site you want to modify.

| <b>~</b> II         | ADMIN → SITES       |             |                |  |  |
|---------------------|---------------------|-------------|----------------|--|--|
| Sites               | Departments & Units | Instruments | Users          |  |  |
| <b>O</b> Site Lists |                     |             |                |  |  |
| Training Lab        |                     |             | Last 90 Days 📿 |  |  |
| Off Site Lab        |                     |             | Last 90 Days 🤇 |  |  |

5. Click "(edit)" next to the site name.

| 0100             | Departments & Onits | instantenta | 03013       |
|------------------|---------------------|-------------|-------------|
| Site Lists       |                     |             |             |
| Training Lab     |                     |             | Last 90 Day |
| Training Lab     | Edit)               |             |             |
| 101 Main St      | 402                 |             |             |
| +1 555-555-5555  | 403                 |             |             |
| Health Dashboard | ł                   |             |             |
|                  |                     |             | $\frown$    |
| /                |                     |             |             |
|                  |                     |             | 1           |

- 6. Change the needed information.
- 7. Click Save

| Country |           | U          | nited State  | es v       |    |    |    |
|---------|-----------|------------|--------------|------------|----|----|----|
| Phone   |           | +1         | <b>~</b> (55 | 5) 555-    |    |    |    |
| Timezor | ne        | A          | merica/Ne    | w_Y v      |    |    |    |
| Loggir  | ng Schedi | ule 🗹 Foll | ow System    | n Schedule |    |    |    |
|         | Su        | Mo         | Tu           | We         | Th | Fr | Sa |
|         | ON        | ON         | ON           | ON         | ON | ON | ON |
|         | Cance     | I          |              |            |    |    |    |

# Add a New User

New users may only be added by administrators.

## Steps to Add a New User:

1. Select "Administration" from the menu

|       | DASHBOARD         | ➡ TASKS                                    |        |   | ×            |
|-------|-------------------|--|--------|---|--------------|
| Tasks | 9                 |  | Ň      | DASHBOARD                                   | >            |
|       |                   |  |        | INSTRUMENTS                                 | >            |
|       | Departments:      | Show All                                   | Units: | REPORTS                                     | >            |
| n.    | Tags: Enter       | a Tag                                      |        | ADMINISTRATION                              | >            |
|       |                   |  |        | Logged in as:<br>TAYLOR GILBERT (ID:847) (T | raining Lab) |
|       | Acetone QC ⊻<br>⊻ | iew Instrument •<br>iew Maintenance Logs • |        | software by                                 | logout       |

2. Select the "Users" tab

| admin 🔶             | SITES       | Sca           | n Barcode 🛄        |
|---------------------|-------------|---------------|--------------------|
| Departments & Units | Instruments | Users         | System             |
|                     |             |               | + Add Site         |
|                     |             | Last 90 Days( | Compliance   100%) |
|                     |             | Last 90 Days  | No data            |
|                     |             |               |                    |
|                     |             |               |                    |
|                     |             |               |                    |

3. Select the "+ Add User" button

| ADMIN 🔶                           | Sca         | n Barcode III |            |
|-----------------------------------|-------------|---------------|------------|
| Departments & Units               | Instruments | Users         | System     |
| Q D Hide Loggers Shov<br>(ID:847) | vn with (*) |               | + Add User |
| ıdy (ID:664)                      |             |               |            |
| )43)                              |             |               |            |
| (ID:402)                          |             |               |            |

4. Enter user information and click Save. (First Name, Last Name, and Email Address are required.) A phone number is required to receive text notifications.

| Add                | New User             |             |               | × | Scan Barcode 🛄 |
|--------------------|----------------------|-------------|---------------|---|----------------|
| Depa               | First Name           | First Nam   | e             |   | System         |
| Total              | Last Name            | Last Nam    | e             |   |                |
|                    | Email Address        | Email       |               |   | - A Addin      |
| Taylor (ID:847)    | Phone                | +1 ~        | (999) 999-999 | 9 | T Add U        |
| nd, Sandy (ID:664) | Job Title            | Job Title ( | optional)     |   |                |
| st (ID:1043)       | Employee/Badge<br>Id | Employee    | /Badge Id (op |   |                |
|                    | le Admin             | 0           |               |   |                |

Note: If user will be an Admin click in box beside "Is Admin ( $\checkmark$ )". If the user will need access to view confidential data, click in the box beside "Can view confidential information ( $\checkmark$ ).

| Job Title                               | Job Title (optional)  |  |
|---|-----------------------|--|
| Employee/Badge<br>Id                    | Employee/Badge Id (op |  |
| Is Admin                                |                       |  |
| Can view<br>confidential<br>information |                       |  |
|   | Cancel Save           |  |
|   |                       |  |
|   |                       |  |

5. Complete the form by ( $\checkmark$ ) the sites, departments and units the user needs. Leave anything the

user should not have access to unchecked.

| 20 | ADMIN - USENS                            | - Courte |
|----|--|----------|
|    | ☑ All Sites                              |          |
|    | Training Lab                             |          |
|    | Off Site Lab                             |          |
|    | Departments                              |          |
|    | Select the Departments for Access        |          |
|    | Hematology - Training Lab                |          |
|    | Coagulation - Training Lab               |          |
|    | Urinalysis - Training Lab                |          |
|    | Blood Bank - Training Lab                |          |
|    | Microbiology - Training Lab              |          |
|    | Point of Care - Training Lab             |          |
|    | Chemistry - Training Lab                 |          |
|    | Pathology - Training Lab                 |          |
|    | Construction of the second second second |          |

6. Under the Notifications heading you can select the Departments the user needs to receive notifications (check as many as necessary).

| e                               | admin 🔶 users  |
|---------------------------------|----------------|
| POC CLIA Waived - Training I    | _ab            |
| Core Lab - Off Site Lab         |                |
| Notifications 🐥                 |                |
| Select the Departments Notifica | ations         |
| All Departments                 |                |
| Hematology - Training Lab       |                |
| Coagulation - Training Lab      |                |
| 🗆 Urinalysis - Training Lab     |                |
| 🗆 Blood Bank - Training Lab     |                |
| 🗆 Microbiology - Training Lab   |                |
| Point of Care - Training Lab    |                |
| 🗆 Chemistry - Training Lab      |                |
| 🗆 Pathology - Training Lab      |                |
| POC Waived (not under CAP)      | - Training Lab |
|                                 |                |

7. Under Notifications Settings you can set the needed Frequencies (check as many as

#### necessary). Notifications can be set to be delivered via email, SMS, or both.

- Point of Care Training Lab
- Chemistry Training Lab
- Pathology Training Lab
- POC Waived (not under CAP) Training Lab
- Point of Care Off Site Lab

#### Notifications Settings

#### Frequency

| Receive Notifications as the occur                          |
|---|
| Daily Summary   |
| You will Receive a Summary of activity Every Evening        |
| Weekly Summary  |
| You will Receive a Summary of activity Every Friday Evening |
|   |

#### Sign-off Chains 🖪

This user is not associated with any Sign-off Chains



Deint of Care - Off Site Lab

#### Notifications Settings

#### Frequency

- Immediately
- Receive Notifications as the occur
- Daily Summary
- You will Receive a Summary of activity Every Evening
- Weekly Summary
- You will Receive a Summary of activity Every Friday Evening

#### Sign-off Chains 🖪

This user is not associated with any Sign-off Chains



# **Edit User's Email Address**

Edit or Change a User Email Address

Can only be completed by Administrator and \*can only be performed after the account has been verified by the user.

1. Navigate to the "Administration" Module.

| oard 🔶 tasks                     |  | ×  |
|----------------------------------|--|----|
| Non-Compliance 2345              | DASHBOARD  | •  |
|                                  | INSTRUMENTS  | •  |
| Units: Show All Search: Search   | ADMINISTRATION   | >  |
|                                  | Logged in as:<br>TAYLOR GILBERT (ID:847) (Training Lab | ɔ) |
| ▶ <u>View Maintenance Logs</u> ▶ | logou<br>software by                                   | t  |

2. Click on the "Users" tab.

| ADMI | N 🔶 SITES   |       | Scan Barcode 🏢            |
|------|-------------|-------|---------------------------|
|      | Instruments | Users | System                    |
|      |             |       |                           |
|      |             |       | + Add Site                |
|      |             | Last  | 90 Days Compliance   100% |
|      |             | Last  | 90 Days Compliance   100% |
|      |             | Last  | t 90 Days No data         |
|      |             |       |                           |
|      |             |       |                           |

# 3. Select a user with an email that you have access to.

| Sites                        | Departments & Units       | Instruments |
|------------------------------|---------------------------|-------------|
| OUsers List 4 Total          |                           |             |
| Search                       | Q Hide Loggers Shown with | (*)         |
| L Gilbert, Taylor (ID:847)   |                           |             |
| L Strickland, Sandy (ID:664) |                           |             |
| L test, test (ID:1043)       |                           |             |
| L Wilson, Joann (ID:402)     |                           |             |

4. Select "Edit" next to the users email address.

<< Return to List



5. You will be prompted to enter a new email address for the user.



## 6. Select "Update" after new email is entered.



7. Once the new email address is entered, a confirmation message will be sent to the new email address, along with a verification code and a link.

Email Update D Inbox ×

no-reply@lablogs.co <u>via</u> amazonses.com to me ▼ Welcome to Electronic Lab Logs!

We received a request to change the email address for the username chad. Please make sure the following changes are correct:

Previous email address: <u>chad@lablogs.co</u> New email address: <u>chadlhartz@gmail.com</u>

To finish changing your email address, go to following link, <a href="https://staging.lablogs.co/#//emailVerfication/?id=431&email=chad@lablogs.co&code=\$2a\$10\$slwxprUQEsJAs9Bwfm/ULuTz4/.16</a>

- 8. Click on the link, and enter the verification code you received in a separate email. You will be required to change your password as well.
- 9. The user's primary email address has been changed!

\*Note: If the user's email address was entered wrong, please rename the user "Delete, Delete" and contact customer support to have the user ID removed from your account. Create the user another account with the correct email address.

# **View User Activity**

This may only be viewed by an administrator.

Steps to View a User's Activity:

1. Select "Administration" from the menu

| DARD 🕪 TASKS                 | ×   |
|------------------------------|---|
| Non-Compliance 648           | DASHBOARD >   |
|                              | INSTRUMENTS >   |
| Units: Show All Search: Sear | ch REPORTS >  |
|                              | ADMINISTRATION >  |
|                              | Logged in as:<br>SANDY STRICKLAND (ID:664) (Training Lab) |
| View Maintenance Logs        | logout<br>software by                                     |

2. Select the "Users" tab

| → SITES     |       | Scan Barcode 🏢                   |
|-------------|-------|----------------------------------|
| Instruments | Users | System                           |
|             |       | + Add Site                       |
|             |       | Last 90 Days Compliance   100%   |
|             |       | Last 90 Days (Compliance   100%) |

3. Select the User you need to view

| Caarab                 | 0        |                               |
|------------------------|----------|-------------------------------|
| Search                 | ų        | □ Hide Loggers Shown with (*) |
| L Gilbert, Taylor (ID: | 847)     |                               |
| Strickland, Sandy      | (ID:664) |                               |
| L test, test (ID:1043) |          |                               |
| Wilson Joann (ID:      | 402)     |                               |

4. On the right of the page, under Manage Account, select "View User Activity"

| IN 🗭 USERS  |       |  |
|-------------|-------|--|
| Instruments | Users | System   |
|             |       | Marage Account<br>View User Activity<br>Reset Password<br>Disable User |

You may also view the same under Reports.

Steps to View User Activity under Reports:

1. Select "Reports" from the menu

| DARD 🔿 TASKS                    | 2                                       | :  |
|---------------------------------|---|----|
|                                 | DASHBOARD >                             |    |
|                                 | INSTRUMENTS >                           |    |
| Units: Show All Search: Search: | h REPORTS >                             |    |
|                                 | ADMINISTRATION >                        |    |
|                                 |   |    |
|                                 | Logged in as:                           |    |
|                                 | SANDY STRICKLAND (ID:664) (Training Lab | )) |
|                                 | logout                                  |    |
| View Maintenance Logs           | software by                             |    |

# 2. Select "Users" on the left of the page

| Maintenance Logs   | Sites:     | Show All ~          | Departments:     | Show All |
|--------------------|------------|---------------------|------------------|----------|
| Sites              |            |                     |                  |          |
| Departments        | 🛭 🛑 Showii | ng Reports in Your  | Queue            |          |
| Benches / Units    | No Month   | aly Poporto to sign |                  |          |
| Instruments        | NOMONU     | ily Reports to sign | r in your queue. |          |
| Users              |            |                     |                  |          |
| Compliance Reviews |            |                     |                  |          |
| Deleted History    |            |                     |                  |          |
|                    |            |                     |                  |          |
3. Use the filters to view the desired information

| e                  | USE                       | RS REPORT                        |
|--------------------|---------------------------|----------------------------------|
| Monthly Reports    |                           | Users                            |
| Maintenance Logs   | Filters                   |                                  |
| Sites              | (Versteiner 10)           | D.L. D                           |
| Departments        | Oser Search Q             | Date Range: From 04/01/2023 10 C |
| Benches / Units    |                           | UserListby                       |
| Instruments        | System Users (3)          |                                  |
| Users )            | <u>User</u>               | Badge/Id                         |
| Compliance Reviews | 1 Gilbert Taylor (ID:847) |                                  |
|                    |                           |                                  |

## Manage an Employee's User Account

Edit, Change, Manage an Employee's User Account and Notifications

This may only be completed by an administrator.

#### Steps to Manage a User Account:

1. Select "Administration" from the menu



#### 2. Select the "Users" tab

| admin 🔶             | SITES       | Sca           | n Barcode 🛄       |
|---------------------|-------------|---------------|-------------------|
| Departments & Units | Instruments | ters          | System            |
|                     |             |               | + Add Site        |
|                     |             | Last 90 Days( | Compliance   100% |
|                     |             | Last 90 Days  | No data           |

### 3. Select the users name you desire to edit

| Sites               | Departments & Units  | Instruments | Users |
|---------------------|----------------------|-------------|-------|
| OUsers List 4 Total |                      |             |       |
| Search              | Q Hide Loggers Showr | n with (*)  |       |
| L Gilber, Taylor    | (ID:847)             |             |       |
| L Strickland, Sa    | indy (ID:664)        |             |       |
| L test, test (ID:   | 1043)                |             |       |
| 💄 Wilson, Joann     | ı (ID:402)           |             |       |
|                     |                      |             |       |

#### 4. Make the changes

#### 5. Select "Save" when complete

Deint of Care - Off Site Lab

#### Notifications Settings

#### Frequency

□ Immediately

Receive Notifications as the occur

Daily Summary

You will Receive a Summary of activity Every Evening

Weekly Summary

You will Receive a Summary of activity Every Friday Evening

#### Sign-off Chains 🖪

This user is not associated with any Sign-off Chains



## **Disable User**

This may only be completed by an administrator.

Steps to Disable a User:

1. Select "Administration" from the menu

|       | DASHBOARD    | → TASKS          |        |   | ×           |
|-------|--------------|------------------|--------|---|-------------|
| Tasks | 0            |                  | N      | DASHBOARD                                     | >           |
|       |              |                  |        | INSTRUMENTS                                   | >           |
| ۲     | Departments: | Show All         | Units: | REPORTS                                       | >           |
|       | Tags: Enter  | a Tag            |        | ADMINISTRATION                                | >           |
|       |              |                  |        | Logged in as:<br>TAYLOR GILBERT (ID:847) (Tra | aining Lab) |
|       | Acetone QC V | iew Instrument > |        | software by                                   | logout      |

2. Select the "Users" tab

| ADMIN 🔶 SITES       |             | Scan Barcode 🛄 |                   |
|---------------------|-------------|----------------|-------------------|
| Departments & Units | Instruments | Users          | System            |
|                     |             |                | + Add Site        |
|                     |             | Last 90 Days   | Compliance   100% |
|                     |             | Last 90 Days   | No data           |

3. Select the user to disable

| Search                 | Q        | □ Hide Loggers Shown with (*) |
|------------------------|----------|-------------------------------|
| L Gilbert, Taylor (ID: | 847)     |                               |
| L Strickland, Sandy    | (ID:664) |                               |
| L test, test (ID:1043) | l.       |                               |
| L Wilson, Joann (ID:4  | 402)     |                               |

4. On the right of the page under Manage Account, select "Disable User"

| st (ID:1043) (Edit) | Manage Account           |
|---------------------|--------------------------|
|                     | View User Activity       |
| No                  | Resend Confirmation Code |
| IND                 | Disable User             |
| mail : test@me.dir  |                          |
|                     |                          |
| he sites for Access |                          |
| tes                 |                          |
| ing Lab             |                          |
| ite Lab             |                          |

### 5. Select "Yes" to complete your action

| t                 |           | Are you sure you want to disable this user?                                  |  |
|-------------------|-----------|--|--|
| st (ID:104        | test test | They will no longer be able to logon but all<br>recorded data will be saved. | Manage Account<br>View User Activity<br>Resend Confirmation Code |
| No                |           |  | Disable User   |
| Email : test@     |           | No   |  |
| the sites for Acc | cess      |  |  |
| ites              |           |  |  |
| ning Lab          |           |  |  |
| Site Lab          |           |  |  |
| ponto             |           |  |  |

# Add a New Department

This may only be done by administration

#### Steps to Add a New Department

1. Select "Administration" from the menu

|       | DASHBOARD     | ➡ TASKS                           |        |  | ×             |
|-------|---------------|-----------------------------------|--------|--|---------------|
| Tasks | 9             |                                   |        | N DASHBOARD                                | >             |
|       |               |                                   |        | INSTRUMENTS                                | >             |
|       | Departments:  | Show All                          | 💌 🗍 Ur | nits: REPORTS                              | >             |
|       | Tags: Enter   | a Tag                             |        | ADMINISTRATION                             | >             |
|       |               |                                   |        | Logged in as:<br>TAYLOR GILBERT (ID:847) ( | Training Lab) |
|       | Acetone QC Vi | ew Instrument •<br>ew Maintenance | Logs+  | software by                                | logout        |

2. Select the "Departments & Units" tab

| 3            | admin 🔶             | SITES       | Scan B         |
|--------------|---------------------|-------------|----------------|
| Sites        | Departments & Units | Instruments | Users          |
| Site Lists   |                     |             |                |
| Training Lab |                     |             | Last 90 Days 📿 |
| Off Site Lab |                     |             | Last 90 Days 🤇 |

3. On the right select the "+ Add Department" button

| ADMIN 🔶 DEI         | PARTMENTS   | Scan Ba        | rcode IIII        |
|---------------------|-------------|----------------|-------------------|
| Departments & Units | Instruments | Users          | System            |
| ≥s v<br>ning Lab    |             | Last 90 Days   | Add Department    |
| ning Lab            |             | Last 90 Days   | No data           |
| g Lab               |             | Last 90 Days   | No data           |
| ing Lab             |             | Last 90 Days C | ompliance   100%) |

### 4. Complete the form

| - 4                     |                        |             |       |
|-------------------------|------------------------|-------------|-------|
| Sites                   | Departments & Units    | Instruments | Users |
| Add Departn             | nent                   |             |       |
| + Department<br>Name    | Department Name        |             |       |
| Site                    | Training Lab           | •           |       |
| Benches / Ur            | nits (1)               |             |       |
| 1. Bench / Unit<br>Name | Enter Bench / Unit Nam |             |       |

### 5. Select "Finish" when you are done

| Track In<br>Usage | strument    | D          |             |        |    |    |    |  |
|-------------------|-------------|------------|-------------|--------|----|----|----|--|
| Loggir            | ng Schedu   | le 🗹 Follo | ow Site Sch | nedule |    |    |    |  |
|                   | Su          | Mo         | Tu          | We     | Th | Fr | Sa |  |
|                   | ON          | ON         | ON          | ON     | ON | ON | ON |  |
| + Add B           | ench / Unit |            |             |        |    |    |    |  |
| Finish            | Cancel      |            |             |        |    |    |    |  |

# Add a New Bench or Unit to a Department

This may only be completed by an administrator.

#### Steps to Add a Bench or Unit to a Department:

1. Select "Administration" from the menu

| 1     | DASHBOARD    | ➡ TASKS                                  |        |   | ×             |
|-------|--------------|--|--------|---|---------------|
| Tasks | 9            |  | N      | DASHBOARD                                   | >             |
|       |              |  |        | INSTRUMENTS                                 | >             |
| ~     | Departments: | Show All                                 | Units: | REPORTS                                     | >             |
| ie    | Tags: Enter  | a Tag                                    |        | ADMINISTRATION                              | >             |
|       |              |  |        | Logged in as:<br>TAYLOR GILBERT (ID:847) (7 | Fraining Lab) |
|       | Acetone QC V | iew Instrument><br>iew Maintenance Logs> |        | software by                                 | logout        |

2. Select the "Departments & Units" tab

| Users           | Instruments | Departments & Units | Sites        |
|-----------------|-------------|---------------------|--------------|
|                 |             |                     | Site Lists   |
| Last 90 Days Co |             |                     | Training Lab |
|                 |             |                     |              |

3. Select the Department that needs the new bench/unit



4. Select the "Edit" button next to the department name

| e                   | admin 🔶                  | DEPARTMENTS |      |
|---------------------|--------------------------|-------------|------|
| Sites               | Departments & Units      | Instruments | User |
|                     |                          |             |      |
| << Return to List   |                          |             |      |
| Department :Urinal  | ysis (Edit)              |             |      |
| Benches / Units (1  | )                        |             |      |
| 1. Bench / Unit Nam | e: Urinalysis            |             |      |
| Site: Training Lab  |                          |             |      |
| CLIA License Nun    | nber: 34D0246093         |             |      |
| CAP: 1412001        |                          |             |      |
| Logging Schedule    | e: Follows Site Schedule |             |      |

5. Scroll to the bottom of the page and select "+ Add Bench / Unit"

| Track Ir<br>Usage | nstrument  |             |             |        |    |    |    |  |
|-------------------|------------|-------------|-------------|--------|----|----|----|--|
| Loggi             | ing Schedu | ule 🗹 Follo | ow Site Scł | nedule |    |    |    |  |
|                   | Su         | Mo          | Tu          | We     | Th | Fr | Sa |  |
|                   | ON         | ON          | ON          | ON     | ON | ON | ON |  |
| + Add B           | ench / Uni | t           |             |        |    |    |    |  |
| Finish            | Cance      | I           |             |        |    |    |    |  |
| •                 |            |             |             |        |    |    |    |  |

6. Fill out the necessary information

| e  |                        | ADMIN 🔶 DEP            | ARTMENTS | Scan B |
|----|------------------------|------------------------|----------|--------|
| 3. | Bench / Unit<br>Name   | Enter Bench / Unit Nam | X Remove |        |
|    | CLIA License<br>Number | (Optional)             |          |        |
|    | Joint<br>Commission    |                        |          |        |
|    | CAP                    |                        |          |        |
|    | COLA                   |                        |          |        |
|    | AABB                   |                        |          |        |

### 7. Select "Finish" when complete

| Track Ir<br>Usage | nstrument   | 0          |             |        |    |    |    |
|-------------------|-------------|------------|-------------|--------|----|----|----|
| Logg              | ing Schedu  | ule 🗹 Folk | ow Site Sch | nedule |    |    |    |
|                   | Su          | Mo         | Tu          | We     | Th | Fr | Sa |
|                   | ON          | ON         | ON          | ON     | ON | ON | ON |
| + Add E           | Bench / Uni | it         |             |        |    |    |    |
| Finish            | Cance       | ł          |             |        |    |    |    |

# Edit a Department, Bench, or Unit

This may only be completed by administration

Steps to Edit a Department:

1. Select "Administration" from the menu

|       | DASHBOARD    | ➡ TASKS                            |      |        |   | ×             |
|-------|--------------|------------------------------------|------|--------|---|---------------|
| Tasks | 8            |                                    |      | N      | DASHBOARD                                   | >             |
|       |              |                                    |      |        | INSTRUMENTS                                 | >             |
|       | Departments: | Show All                           |      | Units: | REPORTS                                     | >             |
| Ŭ.    | Tags: Enter  | a Tag                              |      |        | ADMINISTRATION                              | >             |
|       |              |                                    |      |        | Logged in as:<br>TAYLOR GILBERT (ID:847) (7 | Fraining Lab) |
|       | Acetone QC   | iew Instrument)<br>iew Maintenance | Logs |        | software by                                 | logout        |

2. Select the "Departments & Units" tab

| Users        | Instruments | Departments & Units | Sites        |
|--------------|-------------|---------------------|--------------|
|              |             |                     | Site Lists   |
| Last 90 Days |             |                     | Training Lab |
|              |             |                     |              |

### 3. Select the Department you need to edit



4. Select the "Edit" button next to the department name

| e   | admin 🔶   | DEPARTMENTS |      |
|---|---|-------------|------|
| Sites   | Departments & Units   | Instruments | User |
| << Return to List<br>Department :Urinaly<br>Benches / Units (1<br>1. Bench / Unit Nam<br>Site: Training Lab<br>CLIA License Num<br>CAP: 1412001<br>Logging Schedule | ysis (Edit)<br>)<br>e: Urinalysis<br>nber: 34D0246093<br>e: Follows Site Schedule |             |      |

5. Select "Finish" when complete



# Add to or Edit Sign-Off Chain

May only be completed by an administrator.

Sign-offs are assigned at the department level. Each department may have their unique sign-off chain.

Steps to Edit the Sign-Off Chain:

- 1. Be sure the person you want to add is already a user
- 2. Go to the "Administration" page from the menu



3. Select the "Departments & Units tab

| Sites        | Departments & Units | Instruments | Users          |
|--------------|---------------------|-------------|----------------|
| Site Lists   |                     |             |                |
| Training Lab |                     |             | Last 90 Days C |
| Off Site Lab |                     |             | Last 90 Days   |

### 4. Select the department-site you need to edit

| Sites                | Departments & Units | Instruments | Users          |
|----------------------|---------------------|-------------|----------------|
| Department Lists     |                     |             |                |
| Sites: Show All Site | es 🗸                |             |                |
| Hematology- Trai     | ining Lab           |             | Last 90 Days ( |
| Coagulation- Trai    | ning Lab            |             | Last 90 Days ( |
| Urinalysis- Trainir  | ng Lab              |             | Last 90 Days ( |
| Blood Bank- Train    | ning Lab            |             | Last 90 Days ( |
| Microbiology- Tra    | aining Lab          |             | Last 90 Days ( |

- 5. Below the list of department benches you will find the current Sign-Off Chain
- 6. Select the "Edit" button next to this list

Site: Training Lab CLIA License Number: 34D0246093 CAP: 1412001 Logging Schedule: Follows Site Schedule 4. Bench / Unit Name: Hematology Site: Training Lab CLIA License Number: 34D0246093 CAP: 1412001 Logging Schedule: Follows Site Schedule

- 7. A window will pop up where you will be able to Add a user
- 8. To add a new user select "Add User"

<< Return to Department

Edit Hematology Sign-off Chain



9. Search for the user and select their name when it appears below the search box

|                      |                 | Type a User to Add   | as a Sign-off C | Chain  | ×   |
|----------------------|-----------------|----------------------|-----------------|--------|-----|
| Sites                | Departments & l |                      | User Name       |        |     |
|                      |                 |                      | јо              |        | Q   |
| leturn to Department |                 |                      |                 |        |     |
| dit Hematology S     | ign-off Chain   | Joann Wilson (ID:402 | )               |        |     |
| L Add User           |                 |                      |                 | Cancel | Add |
|                      |                 |                      |                 |        |     |
|                      |                 |                      |                 |        |     |

### 10. Select "Add"



11. You will now have the "Add Optional" button. Select this if your would like it to be optional for 1 of 2 selected users to sign-off.

| << Return to Department             |  |
|-------------------------------------|--|
| Edit Hematology Sign-off Chain      |  |
| signing order                       |  |
| 1 Joann Wilson (ID:4 C Add Optional |  |
| L Add Next                          |  |
| Save Cancel                         |  |
|                                     |  |

12. Select "Add Next" to add another user to be required to sign-off

| signing order |              |    |                      |   |              |
|---------------|--------------|----|----------------------|---|--------------|
| 1 Joann       | Wilson (ID:4 | OR | Taylor Gilbert (ID:8 | Θ | Add Optional |
| Add Next      |              |    |                      |   |              |
| Save          | ancel        |    |                      |   |              |
|               |              |    |                      |   |              |

A - ...

13. You may then need to change the order of the list, use the numbered boxes (drag and drop) to put the list in the correct order (#1 will be the first to sign the report)

| ÆEd        | lit Hematology Sign-off Chain                 |              |
|------------|---|--------------|
| signing or | rder  |              |
| 1          | Joann Wilson (ID:4 OR Taylor Gilbert (ID:8 OR | Add Optional |
| 2          | Sandy Strickland (I Add Optional              |              |
|            | L Add Next                                    |              |
|            | Cancel  |              |

14. Select "Save"

### Edit Hematology Sign-off Chain

| signing or | rder  |                |
|------------|---|----------------|
| 1          | Sandy Strickland (I Add Optional              |                |
| 2          | Joann Wilson (ID:4 OR Taylor Gilbert (ID:8 OR | L Add Optional |
|            | L Add Next                                    |                |
|            | Cancel  |                |

In the event the Sign-Off chain is modified, any open "unsigned" reports will require the new Sign-Off chain User's signature. All previous reports that are signed and closed will still show the signatures of the users that originally signed the report.

# Add a New Instrument Type

May only be completed by an administrator.

Steps to Add a New Instrument Type:

1. Select "Administration" from the menu

|         | DASHBOARD  | ➡ TASKS                               |  | ×              |
|---------|------------|---------------------------------------|--|----------------|
| Tasks   |            |                                       | DASHBOARD                                | >              |
|         |            |                                       | INSTRUMENTS                              | >              |
| iow All | Department | s: Show All                           | T REPORTS                                | >              |
| Search  | Tags: Er   | iter a Tag                            | ADMINISTRATION                           | >              |
|         |            |                                       | Logged in as:<br>TAYLOR GILBERT (ID:847) | (Training Lab) |
| Konst   | Acetone QC | View Instrument ><br>View Maintenance | Logs > software by                       | logout         |

2. Select the "Instruments" tab

| Sites        | ADMIN 🔶             | SITES       | Scar            | n Barcode 💵    |
|--------------|---------------------|-------------|-----------------|----------------|
| Sites        | Departments & Units | Instruments | Users           | Syst           |
| Site Lists   |                     |             |                 | + Ad           |
| Training Lab |                     |             | Last 90 Days Co | ompliance   10 |
| Off Site Lab |                     |             | Last 90 Days    | No data        |
|              |                     |             |                 |                |
|              |                     |             |                 |                |

### 3. Select "+ Add Instrument Type"

| .ists        |        |                 |   |              |                |                  |
|--------------|--------|-----------------|---|--------------|----------------|------------------|
| Search       | Sites: | Show All        | V | Departments: | Show All       | -                |
| show All 🛛 👻 |        |                 |   |              |                |                  |
| nform II QC  |        | Instruments : 1 |   | L            | + Add          | No data          |
|              |        | Instruments : 1 |   | La           | ast 90 Days Co | mpliance   100%) |
|              |        | Instruments : 1 |   | L            | ast 90 Days 🤇  | No data          |
|              |        | Instruments : 1 |   | L            | ast 90 Days 🤇  | No data )        |

4. Enter the type of instrument and other information if desired

| Sites            |                     | Departments & Units  | Instruments | Users |  |
|------------------|---------------------|----------------------|-------------|-------|--|
| Add In           | strumen             | it Type              |             |       |  |
| + Ins<br>Typ     | trument<br>be Name: | Instrument Type Name |             |       |  |
| Ma               | nufacturer:         | Optional             |             |       |  |
| Mo               | del #:              | Optional             |             |       |  |
|                  |                     |                      |             |       |  |
|                  |                     |                      |             |       |  |
| ( and the second |                     |                      |             |       |  |

### 5. Select "Next"

- 6. You will then be asked "Would you like to specify Controls/Reagents Requirements?"
- 7. If your instrument has any reagents or controls select "+ Add Controls/Reagents Requirement"

| Type Nam | kerngerator (Eait)  |  |
|----------|---|--|
| Manufact | <u>rer:</u>   |  |
| Model #: |   |  |
| Would y  | ou like to specify Controls/Reagents Requirements?<br>Controls/Reagents Requirement |  |
|          |   |  |
| Skip >>  | Cancel  |  |
|          |   |  |
|          |   |  |

### 8. Enter the Name and information

|                              |   | )     |
|------------------------------|---|-------|
|                              | Add Lot ×   |       |
| Departments &                | Add a     Controls/Reagents     Name     Example: Control 1             | Users |
|                              | □ Requires Validation □ Is a Kit New                                    |       |
| Refrigerator ( <u>Edit</u> ) | This Controls/Reagents will request and carry over the following fields |       |
|                              | Lot Number  |       |
|                              | <ul> <li>Lot Expiration Date</li> </ul>                                 |       |
| ments: None                  | Date Received (Optional)  |       |

9. Select "Save Lot" (you will be able to add tasks related to the lot under Maintenance Tasks). See <u>How to Add a Reagent/Control</u> article for further details.

| ator (Edit)       | <ul> <li>Lot Expiration Date</li> </ul> |  |
|-------------------|---|--|
| ()                | Date Received (Optional)                |  |
|                   | Date Opened (Optional)                  |  |
|                   | Date Discarded (Optional)               |  |
| None              | Date in Use (Optional)                  |  |
|                   | Notes (Optional)                        |  |
| rement            | Enter Notes                             |  |
|                   |   |  |
| own Exterior      | Save Lot Cancel                         |  |
| ime 3 hrs, Overdu | ue after 5 hrs                          |  |

### 10. Add as many Controls/Reagents as needed

# Add a Control/Reagent for an Instrument Type

This can only be performed by an Administrator User. (Feature Enhancement Release 1.61)

- 1. Navigate to <u>app.lablogs.co/#/dashboard/tasks</u> and log into the system.
- 2. Click the Menu Icon.

|   |       |             |               |        | Scan Barcode      | W    |  |
|---|-------|-------------|---------------|--------|-------------------|------|--|
|   |       | Non-Com     | pliance 85081 |        |                   |      |  |
| ħ | Tags: | Enter a Tag |               |        |                   |      |  |
|   |       |             |               | 1763 N | on Compliance Rev | iews |  |
|   |       |             |               |        |                   |      |  |

- 3. Click "ADMINISTRATION
- 4. Click "Instruments"

| DMIN -> SITES |       |
|---------------|-------|
| Instruments   | Use   |
|               |       |
|               |       |
|               |       |
|               |       |
|               |       |
|               |       |
|               | SITES |

- 5. Click the "Search" field and enter the name of the Instrument Type you would like.
- 6. Click on the Instrument Type

| an arriel it bist | -    |        |          |   |              |          |
|-------------------|------|--------|----------|---|--------------|----------|
| earch exa         | 2    | Sites: | Show All | ~ | Departments: | Show All |
|                   |      |        |          |   |              |          |
| -                 | ment |        |          |   |              |          |
| kample Instrur    |      |        |          |   |              |          |
| xample Instrur    |      |        |          |   |              |          |

### 7. Click "Edit"

| ätes: | Show All | Ŧ    | Departments:  | Show All        | Ψ.       | Units:  | Show All |
|-------|----------|------|---------------|-----------------|----------|---------|----------|
|       |          |      |               |                 | Instrume | nts : 1 |          |
|       |          | Exam | ple Instrumer | t (Edit) Clone) |          |         |          |

8. Click "Add Controls/Reagents Requirement"

|   | S Linked to Task Ex 5 Linked  |
|---|---|
|   | Controls/Reagents Requirements: Ex 6 - A1c (Edit) * remove  |
| • | Controls/Reagents Requirements: Ex 7 - Linked (Edit)  |
|   | S Linked to Task Ex 7 - Linked - L1 QC, Ex 7 - Linked L2 QC, Ex 7 - Linked - L1 Calibrator, Ex 7 - Linked - L |
|   | + Add Controls/Reagents Requirement   |
|   |   |
|   | Maintenance Task Name: Perform Normal QC (Edit) (Clone) K remove  |
| Τ | Eixed Schedule: YES   |
|   | Schedule Hours: 24 Hours 08:00  |

- 9. Click the "Enter Lot Name" field.
- 10. Enter the Name of your Control/Reagent



11. If the Control Reagent Requires a Validation Process to be completed before being considered "In Use", Click the "Requires Validation" field. (*Moderate Complex Tests*).

|                                       | Add Lot                                | ×   |
|---------------------------------------|--|---|
| Departments & Units                   | + Add a                                | Example Reagent                           |
|                                       | Controls/Reagents<br>Name              | Example: Control 1                        |
|                                       | Requires Validatio                     | on 🗆 Is a Kit 🛛 New                       |
| Acetone QC ( <u>Edit</u> )            | This Controls/Reagents<br>fields       | will request and carry over the following |
|                                       | Lot Number                             |   |
|                                       | <ul> <li>Lot Expiration Dat</li> </ul> | e   |
| ents: k-Check Tablets (Edit) X remove | Date Received (Op                      | ptional)                                  |

12. If the Control/Reagent is a "Kit" with multiple items and/or lot numbers, Click the "Is a Kit" field.



13. Click the "Enter Notes" field and enter anything you would like the User to see when creating a new Lot. Example: "Qc every Lot, Shipment, and 30 days."

|   | <ul> <li>Lot Expiration Date</li> </ul> |
|---|---|
|   | Date Received (Optional)                |
| mal QC (Edit) (Clone) X remove          | Date Opened (Optional)                  |
|   | Date Discarded (Optional)               |
| 08:00                                   | Date in Use (Optional)                  |
|   | Notes (Optional)                        |
|   | Enter Notes                             |
| nts KOVA Trol® III Normal               |   |
| ps<br>Normal                            | Add a Secondary Save Lot Cancel         |
| fined when Controls/Respents is entered |   |

14. If you selected the "Is a Kit" box, Click "Add a Secondary". If not, skip to step 17.

| nt  | Lot Expiration Date                        |
|---|--|
|   | Date Received (Optional)                   |
| rmal QC (Edit) (Clone) X remove           | Date Opened (Optional)                     |
|   | Date Discarded (Optional)                  |
| 08:00                                     | <ul> <li>Date in Use (Optional)</li> </ul> |
|   | Notes (Optional)                           |
|   | Each Lot, Shipment, and 30 days            |
| ents KOVA Trol® III Normal                | <i>A</i>                                   |
| rips<br>III Normal                        | Add a Secondary Save Lot Cancel            |
| efined when Controls/Reagents is entered) |  |

- 15. Click the "Name Text" field.
- 16. Enter the Name of the first item in your Kit. Example: Buffer A. You can also add a Description of each item within the Kit. Example: White Cap Solution used in step 3.

| Departments & Units  | Add a     Controls/Reagents     Name     Example: Control 1     Example: Control 1     Example: Control 1 |
|--|---|
| Acetone QC ( <u>Edit</u> )<br>   | Name<br> Text<br>Description<br>Text  |
| k-Check Tablets (Edit) X remove<br>Biorex Labs K-Check Serum Controls (Edi | Delete<br>This Controls/Reagents will request and carry over the following<br>fields                      |

Repeat Steps 14 - 16 for each item within the Kit. 17. Click "Save Lot"



18. Scroll to the bottom on the page and click "Finish" and then Click Yes.

# Convert Existing Controls/Reagents to v1.61 Format

This is only needed if the Administrator User wants to Utilize the new feature enhancements included in the 1.61 software release.

These steps should be used to convert Controls/Reagents lots that existed prior to Release 1.61 to the current format.

- 1. Navigate to the Administration Page > Instruments Tab.
- 2. Click the name of the Instrument Type you need.

| Search    | ex                | Sites: | Show All | Departments: | Show All |
|-----------|-------------------|--------|----------|--------------|----------|
| Centrifug | ge StatSpin Expre | 255    |          |              | Instr    |
| Example   | Instrument        |        |          |              | Instr    |
| Example   | Tasks List        |        |          |              | Instr    |
| EXL 200   |                   |        |          |              | Instr    |
| GeneXpe   | ert               |        |          |              | Instr    |
| Sysmex (  | DI-60             |        |          |              | Instr    |

#### 3. Click "Edit"

/!\

Instrument Lists
| Instruments : 1                          |
|--|
| Instruments : 1                          |
| Example Instrument (Edit) (Clone)        |
| 1. Example Instrument ( Edit ) ( Clone ) |
| Site: Training                           |
| Department: Training                     |
| Bench / Unit: Training                   |
| ell id: 342                              |
| 123456                                   |

The new Control/Reagent has already been created. Find a Task that "uses" the lot. It is seen at the bottom of the next screenshot that task 1 "uses" the "Positive Control" lot.

### 4. Click "Edit"

(!)

| •    | Controls/Reagents Requirements: Positive Control (Edit) * remove  |
|------|---|
|      | Controls/Reagents Requirements: Positive QC (Edit) * remove   |
|      | Add Controls/Reagents Requirement   |
| 1    | Maintenance Task Name: Perform Positive QC (Edit) (Clone) ★ remove<br>Frequency: Unscheduled<br>Fixed Schedule: NO<br>Tags: Enter a new tag |
|      | Affects Compliance: YES   |
| LabL | .ogs User's Manual v1.01 Revision Date: Nov 3, 2023   |

### 5. Check the Box for the New Control/Reagent.

| Reagents Requirements: Positive QC (Edit)        | Tack Links to Nene  |
|--|---|
| Controls/Reagents Requirement                    | Controls/Reagents   |
|  | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the    |
| ance Task Name: Perform Positive QC (Edit) (Clon | Task Uses Lots  |
| Frequency: Unscheduled                           | Positive QC   |
| Fixed Schedule: NO                               | NOTE: If a Task Uses a Lot, the user is required to specify the Lot before co |
| Tags: Enter a new tag                            | Data Fields   |
| Affects Compliance: YES                          | required  |
| S Used Lots: Positive Control                    | Field Label Result Example: PH Level  |

### 6. Uncheck the box for the Old Control/Reagent.

| Reagents Requirements: Positive QC (Edit)        | Task Links to                   | None 🗸  |
|--|---------------------------------|---|
| Controls/Reagents Requirement                    | Controls/Reagents               |   |
|  | NOTE: Linking a Task to a Cont  | rols/Reagents prompts the user to update the  |
| ance Task Name: Perform Positive QC (Edit) (Clon | Task Uses Lots                  |   |
| Erequency: Unscheduled                           | Positive QC                     |   |
| Fixed Schedule: NO                               | NOTE: If a Task Uses a Lot, the | user is required to specify the Lot before co |
| Tags: Enter a new tag                            | Data Fields                     |   |
| Affects Compliance: YES                          | required                        |   |
| S Used Lots: Positive Control                    |                                 |   |

7. Click "Save Task"

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|      | Exa      | mple: PH Level |      |           |        |  |
|------|----------|----------------|------|-----------|--------|--|
| lue  | ~        |                |      |           |        |  |
|      | Acceptab | le 🗙 re        |      |           |        |  |
|      | Acceptab | le 🗙 re        | move |           |        |  |
| tion |          |                |      |           |        |  |
|      |          |                |      |           |        |  |
|      |          |                |      |           |        |  |
|      |          |                |      | Save Task | Cancel |  |
|      |          |                |      |           | 8      |  |

- 8. Repeat Steps 4-7 for each task that "Uses" the Old Control/Reagent.
- 9. Click "remove" beside the Old Control/Reagent.

| nt Type Name:            | Example Instrument (Edit)              |
|--------------------------|--|
| turer:                   |  |
|                          |  |
| Reagents Requirements:   | Positive Control (Edit) remove         |
| Reagents Requirements:   | Positive QC (Edit) * remove            |
| d Controls/Reagents Requ | uirement                               |
|                          |  |
| nance Task Name: Perfo   | rm Positive QC (Edit) (Clone) X remove |

10. Scroll to the bottom of the page and click "Finish"

| Elizad Calculate NO      |  |
|--------------------------|--|
| Fixed Schedule: NO       |  |
| Tags: Enter a new tag    |  |
| Affects Compliance: YES  |  |
| S Used Lots: Positive QC |  |
| Data Fields:             |  |
| Result                   | Defined Value  |
| Add Maintenance Task     |  |
|                          | Tags:       Enter a new tag         Affects Compliance:       YES         Image:       YES         Image:       Data Fields:         Result       Add Maintenance Task |

#### 11. Click "Yes"



## Add Maintenance Tasks for the instrument

1. Select "+ Add Maintenance Task"

| •  | Controls/Reagents Requirements: None             |  |
|----|--|--|
|    | + Add Controls/Reagents Requirement New Features |  |
|    | Would you like to specify Maintenance Tasks?     |  |
|    | + Add Maintenance Task                           |  |
|    |  |  |
| SK | tip >> Cancel                                    |  |
|    |  |  |
|    |  |  |

2. Fill out the necessary information for the task and select "Save Task". Use the links below for additional help if needed

| Starts         | HH          | 4     | MM                  |            | Repeats      | Every       |           | ~          |             |           |    |  |
|----------------|-------------|-------|---------------------|------------|--------------|-------------|-----------|------------|-------------|-----------|----|--|
|                | ~           |       | ~                   |            |              |             |           |            |             |           |    |  |
| Affects Cor    | mpliance    |       |                     |            |              |             |           |            |             |           |    |  |
|                |             |       |                     |            |              |             |           |            |             |           |    |  |
| isk Links to   | nonte       |       | None 🗸              |            |              |             |           |            |             |           |    |  |
| DTT: Linking   | Tasktas     | C     | a la mananta a casa | ata tha us |              |             | table Val |            | one the Lea |           |    |  |
| JTE: Linking a | i task to a | Contr | ois/Reagents prom   | pts the us | er to update | e the Accep | table val | ues whenev | ver the Lo  | t changes | _  |  |
| + Add Da       | ta Field    |       |                     |            |              |             |           |            |             |           |    |  |
|                |             |       |                     |            |              |             |           | _          |             |           | _  |  |
|                |             |       |                     |            |              |             |           | Save       | Task        | Cance     | el |  |
|                |             |       |                     |            |              |             |           |            |             |           |    |  |

3. Be sure to select "Finish" when you have added all the tasks for this instrument type

|   | Maintenance Tack Name: Wine Down Interior (Edit) (Clone) |
|---|--|
| Ш | Erequency: Daily, Lead time 3 hrs, Overdue after 5 hrs   |
|   | Eixed Schedule: NO                                       |
|   | Tags: Enter a new tag                                    |
|   | Affects Compliance: YES                                  |
|   | + Add Maintenance Task                                   |
| • | Cancel   |

4. After you have added the Instrument Type you need to be sure all filters are clear to be able to see the added Instrument Type.

| Search    | Search | Sites: | Show All | • | Departments: | Show All       | • | Units: | Show All | • |                              |
|-----------|--------|--------|----------|---|--------------|----------------|---|--------|----------|---|------------------------------|
|           |        |        |          |   |              |                |   |        |          |   | ➡ Add Instrument Ty          |
| Advia 212 | !Oi    |        |          |   | Ins          | struments : 36 |   |        |          |   | Last 90 Days Compliance   10 |

- 5. You can now add an Instrument to the Instrument Type and add this instrument to the desired site and department to do this select this link: <u>Add an Instrument to a Bench/Unit</u>
- 6. After the Instrument has been assigned to the Site/Bench/Unit you may need to give users access to the instrument.

For more information on adding different types of Maintenance Tasks select from the following: <u>Add a Maintenance Task</u> <u>Add a Maintenance Task that is Linked to a Reagent/Control</u> <u>Add a Maintenance Task that Uses a Reagent/Control</u>

Add a Data Field for Text Add a Data Field with a Number Value Add a Data Field with Defined Values (ex. POS/NEG) Add a Data Field that accepts a File Attachment

# Add Image to Instrument Type

This can only be completed by an Administrator.

Images can only be added to an Instrument Type. A compatible image size must not exceed 400\*400 px. If the image is larger than 400\*400 px you will receive an error message.

Steps to add an Image to an Instrument Type:

1. Select the Administration Page from the Menu.

| DASHBOARD 🛶 TASKS                                       | ×   |
|---|---|
| Tasks 🔟   | DASHBOARD >   |
|   | INSTRUMENTS >   |
| ow All 🛛 🗸 Departments: Show All 👻                      | REPORTS >   |
| Search Tags: Enter a Tag                                | ADMINISTRATION >  |
|   | Logged in as:<br>TAYLOR GILBERT (ID:847) (Training Lab) |
| Acetone QC View Instrument ><br>View Maintenance Logs > | logout<br>software by                                   |

2. Select the Instruments tab.

| lites    | Departments & Units | Instruments | Users           | System           |
|----------|---------------------|-------------|-----------------|------------------|
| Lists    |                     |             |                 | + Add S          |
| ning Lab |                     |             | Last 90 Days Co | ompliance   100% |
| Site Lab |                     |             | Last 90 Days 🤇  | No data          |

3. Select the *Instrument Type* you would like to add an image.

| I-STAT Supplies               | Instruments : 1 | Last 90 Days (No      |
|-------------------------------|-----------------|-----------------------|
| Immucor                       | Instruments : 1 | Last 90 Days Compliar |
| Incubator (37 +-2.5)          | Instruments : 2 | Last 90 Days          |
| Incubator (37 +-2.5) (II C02) | Instruments : 1 | Last 90 Days No       |
| Incubator (41.5-42.5)         | Instruments : 1 | Last 90 Days 🕢 No     |
| Incubator (60+-2)             | Instruments : 2 | Last 90 Days No       |
| Indole                        | Instruments : 1 | Last 90 Days No       |
| Iris 2000                     | Instruments : 1 | Last 90 Days No       |
| Leica Cryostat                | Instruments : 1 | Last 90 Days No       |

4. Click on the Add an Image Icon

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| <b>2</b>  | admin 🔶 instruments  |
|---|--|
| Incubator (41.5-42.5)   | Instruments : 1  |
|   | Incubator (41.5-42.5) (Edit) (Clone)                           |
| Click to upload a new<br>image. It's should not<br>exceed (400*400 px). | Lincubator( <u>Edit</u> )( <u>Clone</u> )<br>Ste: Training Lab |
|   | Department: Microbiology<br>Bench / Unit: Microbiology         |
| Last 90 Days No data  | ell id: 206<br>180239  |
| Documents(0)  |  |
| bator (60+-2)   | Instruments : 2  |

5. Select your Image File from your computer.

# Attach a Document to an Instrument Type

#### This may only be completed by an Administrator.

Attaching a document to an Instrument Type can be useful for users to be able to easily access information. Examples may include Service contracts, SOPs, Package Inserts, etc. Documents attached to the Instrument Type will display across all Instruments assigned to the Type. Steps to Attach a Document to an Instrument Type

1. Navigate to Menu

| Tasks 1 |                             |                 |   | Non-C  | ompliance 228 | 0 |
|---------|-----------------------------|-----------------|---|--------|---------------|---|
| v All 🗢 | Departments:<br>Tags: Enter | Show All        | • | Units: | Show All      | ▼ |
| KOHEM   | Acetone QC V                | ew Instrument • |   |        |               |   |

2. Administration

| DASHBOARD 🛶 TASKS                                     | ×   |
|---|---|
| Tasks 🚺   | DASHBOARD >   |
|   | INSTRUMENTS >   |
| ow All 🗢 Departments: Show All 💌                      | L REPORTS >   |
| Search Tags: Enter a Tag                              | ADMINISTRATION >  |
|   | Logged in as:<br>TAYLOR GILBERT (ID:847) (Training Lab) |
| Acetone QC View Instrument><br>View Maintenance Logs> | software by   |

## 3. Instruments Tab

| iites    | Departments & Units | Instruments | Users           | System           |
|----------|---------------------|-------------|-----------------|------------------|
| Lists    |                     |             |                 | + Add S          |
| ning Lab |                     |             | Last 90 Days Co | ompliance   100% |
| Site Lab |                     |             | Last 90 Days 🤇  | No data          |

4. Select the Instrument Type you need and expand the panel.

|                        |                 | + Add Instru          |
|------------------------|-----------------|-----------------------|
| Accu-Chek Inform II QC | Instruments : 1 | Last 90 Days No       |
| Acetone QC             | Instruments : 1 | Last 90 Days Complian |
| Amniotest              | Instruments : 1 | Last 90 Days No       |
| Ana-ID                 | Instruments : 1 | Last 90 Days No       |
| Antigen Typing QC      | Instruments : 1 | Last 90 Days No       |
| API                    | Instruments : 1 | Last 90 Days No       |
| Bacitracin Disc        | Instruments : 1 | Last 90 Days No       |

5. Select the Documents link (just below the Last 90 days Compliance Score)

|                         | Amniotest (Edit) (Clone)  | + Add Instru  |
|-------------------------|---|---|
| Last 90 Days<br>No data | 1. Amniotest ( <u>Edit</u> ) ( <u>Clone</u> )<br>Site: Training Lab<br>Department: Point of Care<br>Bench / Unit: Point of Care<br>ell id: 69 | Status : Online<br>View Maintenance<br>View Instrument<br>Controls/Reagents |
| Ana-ID                  | Instruments : 1   | Last 90 Days O  |
| gen Typing QC           | Instruments : 1   | Last 90 Days  |

### 6. Select Add File

| nniotest   |                                |
|--|--------------------------------|
| nstrument Documents                              | ×                              |
| ile List(1)                                      | Add File                       |
| lote : Maximum size of a single document is 20MB |                                |
| File Name  |                                |
| Aminotest QC Log.pdf                             |                                |
|  | Туре                           |
|  | Save Cancel                    |
| Instruments : 1                                  | Last 90 Days Compliance   100% |
| Instruments 1                                    | Last 90 Davis No data          |

7. Select the File from your Computer. (Add Description if needed)

|  | File List(2)                                     |
|--|--|
| Annua  | Note : Maximum size of a single document is 20MB |
| int <sub>1</sub>   | File Name  |
| mes<br>mes   | Aminotest QC Log.pdf                             |
| the statement  | amniotest.jpg                                    |
| Winter Connection  | Description                                      |
| and the local division of the local division | Explain the Description                          |
| Last 90 Days   |  |
| No data  |  |
| Documents(1)   | Save   |
| Ana-ID   | Instruments · 1                                  |
|  |  |
| gen Typing QC  | Instruments : 1                                  |

8. Select Save

| m size of a single document is 20MB | d Instrument         |
|-------------------------------------|----------------------|
|                                     | hline                |
| QC Log.pdf                          | tenance Logs►        |
| bà                                  | eagents ►            |
| e Description                       |                      |
|                                     | Cancel               |
| Instruments : 1                     | Last 90 Days No data |
| Instruments : 1                     | Last 90 Days No data |

You can View the Documents on the User's Instrument Page.

## To view the Document(s):

1. Select Show Files

|         |                      | All Tasks |  | Reports |
|---------|----------------------|-----------|--|---------|
| Documer | nts (2) <u>sho</u> v | w files • |  | + Add   |
|         |                      | 1         |  |         |

2. Select the download button beside the document you need to download.

|          |                      | All Tasks |           |     |  | Rep | ports            |
|----------|----------------------|-----------|-----------|-----|--|-----|------------------|
| Docume   | nts (2) <u>sho</u> v | w files 👻 |           |     |  |     |                  |
| File Nar | ne                   |           |           |     |  |     |                  |
| Aminote  | est QC Log.p         | df        |           | Ł   |  |     |                  |
| PL901-2  | 20_en03.pdf          |           |           |     |  |     |                  |
|          |                      |           |           |     |  |     | + Add Service Re |
| Sort By  | Status               | Default   | Frequency | A-Z |  |     |                  |
|          |                      | 7         |           |     |  |     |                  |
| Tasks    | 5                    |           |           |     |  |     |                  |

3. Open the Downloaded File

# **Add Maintenance Task**

This can only be completed by an Administrator

Adding maintenance tasks can be done when creating a new instrument type or editing a current instrument's tasks. First follow the steps in the links below. Then when you are ready refer back to this page to add maintenance tasks.

Add a New Instrument Type Edit an Existing Instrument Type If you need to Add a Maintenance Task that is Linked to a Reagent/Control select this link. If you need to Add a Maintenance Task that Uses a Reagent/Control select this link.

Steps to Add a Maintenance Task:

#### 1. Go to the "Administration" page from the menu

| DA    | ASHBOARD 🔶    | TASKS    |        |  | ×              |
|-------|---------------|----------|--------|--|----------------|
| (S    |               |          |        | DASHBOARD                                  | >              |
|       |               |          |        | INSTRUMENTS                                | >              |
| All 💌 | Departments:  | Show All | Units: | REPORTS                                    | >              |
| ch    | Tags: Enter a | Tag      |        |  | >              |
| )ate! |               |          |        | Logged in as:<br>SANDY STRICKLAND (ID:664) | (Training Lab) |
|       |               |          |        |  | logout         |
|       |               |          |        | software by                                | 100            |

2. Select the "Instruments" tab

| Sites      | Departments & Units | Instruments | Users          | Sy      |
|------------|---------------------|-------------|----------------|---------|
| e Lists    |                     |             |                | + /     |
| aining Lab |                     |             | Last 90 Days 🤇 | No data |
| f Site Lab |                     |             | Last 90 Days   | No data |

## 3. Select the Instrument Type you want to modify and expand the panel

|                                | ADMIN - INSTRUMENTS | ocar bar       |
|--------------------------------|---------------------|----------------|
| Previ Color V2 Preve           | Instruments : 1     | Last 90 Days 🤇 |
| RapidOne                       | Instruments : 1     | Last 90 Days 🤇 |
| Refrigerator                   | Instruments : 1     | Last 90 Days 🤇 |
| Refrigerator                   | Instruments : 1     | Last 90 Days 🤇 |
| Refrigerator (2°C-8°C)         | Instruments : 3     | Last 90 Days 🤇 |
| Refrigerator (2C-6C w/Alarm)   | Instruments : 2     | Last 90 Days 🤇 |
| Refrigerator (2C-8C)           | Instruments : 2     | Last 90 Days 🤇 |
| Refrigerator (2C-8C) (w/calib) | Instruments : 2     | Last 90 Days 🤇 |

4. Click "Edit" to modify the Instrument Type

|              | ADMIN 🔶 INSTRUMENTS                | Scan Ba         |
|--------------|------------------------------------|-----------------|
| RapidOne     | Instruments : 1                    | Last 90 Days    |
| Refrigerator | Instruments : 1                    | Last 90 Days    |
| Refrigerator | Instruments : 1                    | Last 90 Days    |
|              | Refrigerator (Edit) (Clone)        | + Add In        |
| FØ1          | 1. Refrigerator ( Edit ) ( Clone ) | Status : Online |
|              | Site: Training Lab                 | View Mainten    |
|              | Department: Hematology             | View Instrume   |
|              | Bench / Unit: Hematology           | Controls/Read   |
| Last 90 Days | ell id: 205                        |                 |
| No data      | 123                                |                 |
| Documents(0) |                                    |                 |

5. Select the "+ Add Maintenance Task" button

| Maintenance Task Name: Wine Down Interior (Edit) (Clone) |
|--|
| <u>Fixed Schedule</u> : YES                              |
| Schedule Hours: 24 Hours 00:00                           |
| Tags: Enter a new tag                                    |
| Affects Compliance: YES                                  |
| + Add Maintenance Task                                   |
|  |
| sh Cancel  |

6. Enter the name of the task to be completed

| Mair | ntenance Task | Enter Maintenance Task  |
|------|---------------|---|
| л!   |               | Example: Run Level 1 QC   |
| Note | es (Optional) | * Maximum 5000 characters allowed   |
|      |               | $B I \cup G H_1 H_2 \equiv \equiv x_2 x^2 \equiv \equiv * $ Normal $\Rightarrow$ Normal $\Rightarrow A$ Sans Serif $\Rightarrow \equiv$ |
|      |               | <u>T</u> x &  |
|      |               | Enter Notes here  |

7. Add a note if necessary, this note will appear under the task for the user when task is selected to be marked as complete

|       | Maintenance Task | Record Temperature Example: Run Level 1 QC         |
|-------|------------------|--|
| 1 -   | Notes (Optional) | * Maximum 5000 characters allowed                  |
|       |                  | B $I \ \bigcup \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $ |
|       | Frequency        |  |
|       | C Fixed Schedule |  |
| inish | ^                | ^  |

8. Select the frequency or Fixed Schedule of the task from the drop down list (if the frequency you need is not listed please <u>Create a Ticket</u> with the desired frequency)

| tes (option | iai)     |                  |               |                |          |  |
|-------------|----------|------------------|---------------|----------------|----------|--|
|             |          | BIUS             | H1 H2 ]≣ ≔    | x₂ x² ☲ ☲ ▶¶   | t l      |  |
|             |          | Normal 🗘 No      | ormal 😂 🗛 🗛   | Sans Serif 💲 🚦 | <b>-</b> |  |
|             |          | <i>T</i> . %     |               |                |          |  |
|             |          |                  |               |                |          |  |
|             |          | Enter Notes here |               |                |          |  |
|             |          |                  |               |                |          |  |
|             |          |                  |               |                |          |  |
|             |          |                  |               | -              |          |  |
| duency      |          |                  |               |                |          |  |
| quency      |          |                  |               |                | Ť        |  |
| Fixed Scher | dule     |                  |               |                |          |  |
|             | adro     |                  |               |                |          |  |
|             | ^        | ^                |               |                |          |  |
| Starts      | HH :     | MM               | Repeats Every | ~              |          |  |
|             | ~        | ~                |               |                |          |  |
|             |          |                  |               |                |          |  |
| Affects Con | npliance |                  |               |                |          |  |
|             |          |                  |               |                |          |  |

## Fixed Schedule

|         | Maintenance   | Task             | Record Temperature  |                |
|---------|---------------|------------------|---|----------------|
| 1 !     | Notes (Optior | nal)             | * Maximum 5000 characters allowed<br>B I U S H1 H2 $\equiv \equiv \times_2$   | X <sup>2</sup> |
|         |               |                  | Image: Constraint of the second se |                |
|         | Frequency     | dule             |   | ~              |
| • inish | Starts        | <b>^</b><br>HH:: | MM Repeats Every  | $\sim$         |

9. The Affects Compliance box is generated with √. This box must remain checked in order for validation of task completion to count towards compliance scores.

| 1 | Fixed Sche      | dule          |        |                     |                                  |                          |
|---|-----------------|---------------|--------|---------------------|----------------------------------|--------------------------|
|   |                 | ^             |        | ~                   |                                  |                          |
|   | Starts          | нн            | : [    | MM                  | Repeats Every                    | ~                        |
|   |                 | ~             |        | ~                   |                                  |                          |
|   | Affects Co      | mpliance      |        |                     |                                  |                          |
|   | Task Links to   |               |        | None ~              |                                  |                          |
|   | Controls/Reag   | gents         |        |                     |                                  |                          |
|   | NOTE: Linking a | a Task to a ( | Contro | ls/Reagents prompts | the user to update the Acceptabl | le Values whenever the L |

#### 10. If this task is a simple "Mark as Complete" task select "Save Task"

| Starts                     | HH :                   | MM ~   | Repeats Every                   | ~                             |            |  |
|----------------------------|------------------------|--------|---------------------------------|-------------------------------|------------|--|
| Affects Cor                | mpliance               |        |                                 |                               |            |  |
| sk Links to<br>ntrols/Reag | gents<br>Task to a Con | None ~ | nots the user to update the Acc | eptable Values whenever the L | ot changes |  |
| Add Da                     | ta Field               |        |                                 |                               |            |  |
|                            |                        |        |                                 | Save Task                     | Cancel     |  |

11. If this task has 1 or more Data Fields follow the links below for help 12. When you have finished editing the instrument be sure to select "Finish"

|   | Maintenance Task Name: Wipe Down Interior (Edit) (Clone) | × remove |
|---|--|----------|
| 2 | Eixed Schedule: YES                                      |          |
|   | Schedule Hours: 24 Hours 00:00                           |          |
|   | Affects Compliance: YES                                  |          |
|   | + Add Maintenance Task                                   |          |
|   | Sh Cancel  |          |

NOTE: You may add as many maintenance tasks as necessary to an instrument. Add a Data Field for Text Add a Data Field with a Number Value Add a Data Field with Defined Values (ex. POS/NEG) Add a Data Field that accepts a File Attachment Related Edit an Existing Maintenance Task

## **Frequency vs. Fixed Schedule**

Each maintenance task has a Frequency or Fixed Schedule that it needs to be completed. There are 2 options for setting this up when creating an instrument. This may only be done by administrators. Frequency

- 1. Make a selection that describes how often the task must be completed ex. every 8 hours, daily, weekly.
- Next you choose the Lead Time you want it to show as Ready and the time in which it would be Overdue. The time for the task shows as ready means, from the last time the task was entered, when it can be done and still be compliant.
- 3. Then select the Overdue. For example, if you have a 24 hour/Daily task with a Lead Time of 3 hours, Overdue after 5 hours, this means the task will be due 24 hours after the last time it was completed.

A frequency selection of Daily, Lead time 3 hrs, Overdue after 5 hrs will appear on your dashboard as Ready 3 hours prior to the last completed time and be considered Overdue 5 hours afterwards. This means there is an 8 hour window in which the task may be completed.

#### **Fixed Schedule**

You may also choose to set a Fixed Schedule for each task. This may be used when a task can be done at any point in a given window. For example, a daily task that can be done at any point during the day. The task will show due at 00:00 and be done any time before 00:00 the following day.

Task Status and Frequencies

It is important to understand how the frequency, and (more specifically) the lead time, late time, and site "working hours" affects your task status throughout the maintenance/QC cycle. Here is a more detailed listing of each possible status and how it is affected by each.

Up-to-date: No action on the task is necessary at this time. The "lead time" (Due Date/time minus Lead time hours) has not yet been reached.

Due Now: The task has reached or exceeded the Due Date/time, but has not yet exceeded the "late time" hours specified in the frequency.

Example: If the task was due on a Monday and the late time specified on the frequency is 48 hours, the task will show as Due now until Wednesday, at which point it will be marked as *Overdue* status.

NOTE: It should be noted that the the Due Date/time calculation WILL TAKE INTO ACCOUNT THE SITES BUSINESS SCHEDULE.

Example: If a task is due on a day where the lab is closed (i.e. a "Saturday") The task Due Date/Time will be adjusted to be the next scheduled business day (i.e. "Monday").

Overdue: The task is ready to be logged. This is determined by taking the calculated "Due Now" date/time of the task and subtracting the Lead Time hours from the frequency (Due Date/Time minus the Lead Time hours). If the task is not yet due, but *past* the calculated lead time, the task is marked as "Ready".

Ready: The task is ready to be logged. It is not yet Due, but has surpassed the lead time hours specified in the frequency. This is determined by taking the calculated "Due Now" date/time of the task and subtracting the lead time hours from the frequency that has been assigned (Due Now date/time minus Lead Time hours). If the task is not yet due, but *past* the lead time, the task will be shown as "Ready".

NOTE: The "Ready" and "Overdue" statuses will be calculated using the "Adjusted" Due Now date/time, for example:

A task with a 48 hour lead and late time has an upcoming task due. The next due date/time falls on a Saturday. The site is closed on Saturdays and has been configured as such in our system. Since the lab is closed, the system will automatically adjust the due date to be the next working business day (Monday). The "Ready" state will be seen on Saturday. The "Overdue" state will be seen on Wednesday, if the task is not performed.

## **Editing a Frequency**

Frequency to Fixed Schedule: When your task is built with a frequency such as below

| Frequency    |       | Daily, Lead ti | ime 3 hrs, Overdue after 5 hrs |   |
|--------------|-------|----------------|--------------------------------|---|
| □ Fixed Sche | edule |                |                                |   |
|              | ~     | ~              |                                |   |
| Starts       | HH :  | MM             | Repeats Every                  | ~ |
|              | *     | *              |                                |   |

and you want to change it to a fixed schedule you would click the box beside of Fixed Schedule, make sure your start time is 00:00 and choose Repeats Every 24 Hours. (We recommend only using the Fixed Schedule with a start time of 00:00 every 24 Hours)

| Frequency  |      |     |    |               |          |   |
|------------|------|-----|----|---------------|----------|---|
| Fixed Sche | dule |     |    |               |          |   |
|            | ^    |     | ^  |               |          |   |
| Starts     | 00   | : [ | 00 | Repeats Every | 24 Hours | ~ |
|            | *    |     | *  |               |          |   |

Note: When the frequency is changed from "Frequency" to "Fixed Schedule", the task will trigger the new frequency based on time of last completion.

*Fixed Schedule to Frequency:* When your task is built with a fixed schedule and you want to change it to a frequency, click on the check mark beside of Fixed Schedule to remove it then click on the arrow in the box beside of Frequency to open a list of frequencies available for you to choose your new frequency. If the frequency you need is not listed, notify support and we will get it added to your database.

| Frequency | $\odot$ |
|-----------|---------|
|           |         |

|               |           | Every 5 Days, Lead time 24 hrs, Overdue after 24 hrs                              |  |  |  |  |
|---------------|-----------|---|--|--|--|--|
| Edit Mainte   | nance T   | Weekly Lenient, Lead time 168 hrs, Overdue after 168 hrs                          |  |  |  |  |
| Eartmainte    | indirio i | Weekly +/- 48 hours, Lead time 48 hrs, Overdue after 48 hrs                       |  |  |  |  |
|               |           | Weekly, Lead time 24 hrs, Overdue after 24 hrs                                    |  |  |  |  |
| Maintenance   | Task      | Every 2 Weeks, Lead time 24 hrs, Overdue after 24 hrs                             |  |  |  |  |
|               |           | Every 30 Days, Lead time 24 hrs, Overdue after 24 hrs                             |  |  |  |  |
|               |           | Every Month, 48 hrs lead, 1 Week Overdue, Lead time 48 hrs, Overdue after 168 hrs |  |  |  |  |
| Notes (Option | al)       | Every 60 Days, Lead time 24 hrs, Overdue after 24 hrs                             |  |  |  |  |
|               |           | 60 days, 48 hr lead, 7 days overdue, Lead time 48 hrs, Overdue after 168 hrs      |  |  |  |  |
|               |           | Every 90 Days, Lead time 24 hrs, Overdue after 24 hrs                             |  |  |  |  |
|               |           | 90 days, lead 1 week, Overdue 1 week, Lead time 168 hrs, Overdue after 168 hrs    |  |  |  |  |
|               |           | Every 4 Months +/- 1 Week, Lead time 168 hrs, Overdue after 168 hrs               |  |  |  |  |
|               |           | Every 6 Months, Lead time 168 hrs, Overdue after 168 hrs                          |  |  |  |  |
|               |           | Annual +/- 30 days, Lead time 720 hrs, Overdue after 720 hrs                      |  |  |  |  |
|               |           | Once a Year, Lead time 168 hrs, Overdue after 168 hrs                             |  |  |  |  |
| _             |           | Annual, 1 month lead, 1 week overdue, Lead time 720 hrs, Overdue after 168 hrs    |  |  |  |  |
| Frequency     |           | ✓ Unscheduled   |  |  |  |  |
| □ Fixed Scheo | dule      |   |  |  |  |  |
|               | ~         | ^   |  |  |  |  |
| Starts        | HH :      | MM Repeats Every ~  |  |  |  |  |
|               | ~         | ~   |  |  |  |  |

Note: When the frequency is changed from "Fixed Schedule" to "Frequency", the task will trigger the new frequency based on time of last completion.

*Unscheduled*: This frequency is used for any tasks that are as needed or do not have a specific schedule. It is found in the list under Frequency.

Note: If the Unscheduled task has previously been completed and you change to a "Frequency" or a "Fixed Schedule" the task will trigger due based on the time of last completion. However, if the task has NOT previously been completed it will not automatically trigger. You will have to complete the task the first time after the frequency has been changed for it to trigger on the Dashboard.

# Add a Data Field for Text

Data fields are entered within a Maintenance Task. If you haven't already started entering your Maintenance Task, select the link below then refer back to this page.

#### Add a Maintenance Task

Steps to Add a Data Field with a Text Field:

1. Under the maintenance task information you have already entered select "+ Add Data Field"

| Task Links to<br>Controls/Reagents | None  | ·  |   |  |
|------------------------------------|---|--|---|--|
| NOTE: Linking a Task to a (        | Controls/Reagents prom  | ots the user to update th  | e Acceptable Values whenever the Lot  | chang  |
| Task Uses Lots                     |   |  |   |  |
| Wright Stain Pack                  | the user is required to   | nacify the Lot hefore c  | moleting the Tack   |  |
|                                    | , the user is required to :   | specify the Lot before c   | impleting the task.   |  |
| + Add Data Field                   |   |  |   |  |
|                                    |   |  | Save Task   | Car  |
|                                    | Task Links to<br>Controls/Reagents<br>NOTE: Linking a Task to a C<br>Task Uses Lots<br>Wright Stain Pack<br>NOTE: If a Task Uses a Lot, | Task Links to<br>Controls/Reagents<br>NOTE: Linking a Task to a Controls/Reagents prom<br>Task Uses Lots<br>Wright Stain Pack<br>NOTE: If a Task Uses a Lot, the user is required to s | Task Links to<br>Controls/Reagents<br>NOTE: Linking a Task to a Controls/Reagents prompts the user to update th<br>Task Uses Lots<br>D Wright Stain Pack<br>NOTE: If a Task Uses a Lot, the user is required to specify the Lot before co<br>Add Data Field | Task Links to       None         Controls/Reagents       None         NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lot         Task Uses Lots       Wright Stain Pack         NOTE: If a Task Uses a Lot, the user is required to specify the Lot before completing the Task.         Image: Add Data Field         Save Task |

2. If it is not required that this Data Field is entered to complete the task, uncheck the box next to "required"

| NOTE: If a Task Uses a Lo | ot, the user is require | ed to specify the Lot before completing the Task. |  |
|---------------------------|-------------------------|---|--|
| Data Fields               |                         |   |  |
| required 🗆 Is Co          | onfidential             |   |  |
|                           |                         | Example: PH Lovel                                 |  |
|                           |                         | LAMIPIE. FIT Lever                                |  |
| -leid Type                | *                       |   |  |

## 3. If the data is confidential, check the box next to "Is Confidential"

| 🗆 Wright Stain Pack             |                             |                       |                |  |
|---------------------------------|-----------------------------|-----------------------|----------------|--|
| NOTE: If a Task Uses a Lot, the | user is required to specify | the Lot before comple | ting the Task. |  |
| Data Fields                     |                             |                       |                |  |
| Z required 🗆 Is Confide         | ntial                       |                       |                |  |
| Field Label                     | Example                     | e: PH Level           |                |  |
| Field Type                      | ~                           |                       |                |  |
|                                 |                             |                       |                |  |

#### 4. Enter the Label you want on this text box

| Data Fields | k:               |   |                   |  |  |
|-------------|------------------|---|-------------------|--|--|
| required    | 🗆 Is Confidentia | I |                   |  |  |
| -ield Label |                  |   | Example: PH Level |  |  |
| ield Type   |                  | • |                   |  |  |
|             |                  |   |                   |  |  |

5. From the drop down box next to Field Type, Select "Text" or "Text Area". This will provide the user with a box to enter either a small "Text" answer, or a "Text Box" will provide more space for a larger amount of information

| 🛛 required | □ Is Confidential      |                     |  |
|------------|------------------------|---------------------|--|
| ield Label | Corrective Action Take | n Example: PH Level |  |
| ield Type  | · ·                    |                     |  |
|            |                        |                     |  |
| + Add D    | ata Field              |                     |  |

## 6. Select "Save Task" when you have added all the data fields necessary

| Action Taken | Example: PH Level |                           |
|--------------|-------------------|---------------------------|
| ential<br>#  | Example: PH Level | ( <u>Clone</u> ) ★ remove |
|              |                   | Save Task Cancel          |

## 7. When you have completed the rest of the instruments tasks select "Finish"

| Frequency: Unscheduled                 |                   |
|--|-------------------|
| Fixed Schedule: NO                     |                   |
| Tags: Enter a new tag                  |                   |
| Affects Compliance: YES                |                   |
| Data Fields:                           |                   |
| Corrective Action Taken<br>Reference # | Text Area<br>Text |
| + Add Maintenance Task                 |                   |
|  |                   |
| Cancel                                 |                   |

# Add a Data Field with a Number Value

Data fields are entered within a Maintenance Task. If you haven't already started entering your Maintenance Task, select the link below then refer back to this page. Add a Maintenance Task

Steps to Add a Data Field with a Number Value:

1. Under the maintenance task information you have already entered select "+ Add Data Field"

|                  | Task Links to None Controls/Reagents  |
|------------------|---|
| <u>1</u> <u></u> | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lot chang |
|                  | Task Uses Lots  |
|                  | NOTE: If a Task Uses a Lot, the user is required to specify the Lot before completing the Task.                     |
|                  | Data Fields   |
|                  | + Add Data Field  |
|                  | Save Task Car   |

2. If it is not required that this Data Field is entered to complete the task, uncheck the box next to "required"

| ۲ | <u>Instrume</u> | Task Links to Controls/Reagents None>   |      |
|---|-----------------|---|------|
|   | <u>Manufac</u>  | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenev | er t |
|   | <u>Model #</u>  | Data Fields   |      |
| • | Controls        | required 🗆 Is Confidential  |      |
|   | + Ac            | Field Label Example: PH Level   |      |
|   | Mould           | Field Type ~  |      |
|   | vvouid          |   |      |

## 3. If data is confidential, check the box next to "Is Confidential"

| Instrume        | Task Links to Controls    | s/Reagents          | None ~  |
|-----------------|---------------------------|---------------------|---|
| Manufac         | NOTE: Linking a Task to a | Controls/Reagents p | prompts the user to update the Acceptable Values whenever the |
| <u>Model #</u>  | Data Fields               |                     |   |
| <u>Controls</u> | ✓ required □ Is Co        | onfidential         |   |
| <b>+</b> Ac     | Field Label               |                     | Example: PH Level   |
|                 | Field Type                | ~                   |   |
| Would           |                           |                     |   |
| <b>+</b> Ac     | + Add Data Field          |                     |   |

## 4. Enter the Label you want on this value

| Instru                    | Task Links to Controls/Reagents None   |
|---------------------------|--|
| Manu                      | fac NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo |
| Mode                      | L# Data Fields   |
| <ul> <li>Contr</li> </ul> | ols required 🗆 Is Confidential   |
| +                         | Ac Field Label Example: PH Level   |
| Wou                       | Field Type ~   |
| +                         | Ac + Add Data Field  |
| (ip >>                    |  |

## 5. From the drop down box next to Field Type, Select "Number"

|   | Instrume       | Task Links to Controls/Reagents None  |
|---|----------------|---|
|   | <u>Manufac</u> | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo  |
|   | <u>Model #</u> | Data Fields   |
| ~ | Controls       | <ul> <li>required          Is Confidential     </li> <li>Field Label          Temperature °C Example: PH Level     </li> <li>Field Type       </li> </ul> |
| 0 | Would          | + Add Data Field  |
|   |                |   |

6. This will provide the user with a box to enter a number value, if any number is acceptable uncheck the box beside "Validate Field" and you have finished this Data Field

| <ul> <li>Instru</li> </ul> | <u>me</u>                                    |
|----------------------------|--|
| Manu                       | ✓ required □ Is Confidential                 |
| Maria                      | Field Label Temperature °C Example: PH Level |
| iviode                     | Field Type Number ~                          |
| ✓ Contr                    | Validate Field                               |
|                            | Acceptable if                                |
|                            | ▲ Add More Validation                        |
| Wou                        | Id   |
| +                          | Ac 🕂 Add Data Field                          |

7. If this number needs to be validated, or has values that are acceptable and others that are not, leave the box checked for "Validate Field"

8. Select from the drop down menu one of the following: Greater Than, Greater Than or Equal, Less Than, Less Than or Equal, Equals, or Between
| Instrume     | Data Fields   |                   |
|--------------|---|-------------------|
| Manufac      | ✓ required □ Is Confidential  |                   |
| Model #      | Field Label Temperature °C  | Example: PH Level |
| Model #      | Field Type Number ~   |                   |
| Controls     | ✓ Validate Field  |                   |
| <b>-</b> • • | Acceptable if   | ▼ remove          |
| TAU          | + Add More Validation   |                   |
| Would        |   |                   |
| + Ac         | Add Data Field     Add Data     Add Data Field     Add Data     Add Data Field     Add Data Field |                   |
|              |   |                   |
|              |   |                   |

# 9. Enter the value or values to complete the field

| 🗹 required  | □ Is Confidential |                   |
|-------------|-------------------|-------------------|
| Field Label | Temperature °C    | Example: PH Level |
| Field Type  | Number ~          |                   |
| Acceptab    | le if Between     | ✓ AND ★ remove    |
|             |                   |                   |
| + Add D     | ata Field         |                   |

10. Select "Save Task" when you have added all the data fields necessary

|              | ( <u>Clone</u> ) <b>X</b> remove |  |
|--------------|----------------------------------|--|
| AND 8 remove |                                  |  |
|              | Save Task Cancel                 |  |

# 11. When you have completed the rest of the instrument's tasks select "Finish"

| Tana                                    |        |
|---|--------|
| <u>lags:</u> Enter a new tag            |        |
| Affects Compliance: YES<br>Data Fields: |        |
| Temperature °C                          | Number |
| + Add Maintenance Task                  |        |
|   |        |

# Add a Data Field with Defined Value

Data fields are entered within a Maintenance Task. If you haven't already started entering your Maintenance Task, select the link below then refer back to this page. Add a Maintenance Task

Steps to Add a Data Field with a Defined Value:

Ŧ

Ŧ

1. Under the maintenance task information you have already entered select "+ Add Data Field"

| [ <u>2]</u> <u>N</u> | Affects Compliance                 | Ň.  |   |
|----------------------|------------------------------------|---|---|
|                      | Task Links to<br>Controls/Reagents | None 🗸  |   |
|                      | NOTE: Linking a Task to a          | Controls/Reagents prompts the user to update th | ne Acceptable Values whenever the Lot chang |
|                      | Data Fields                        |   |   |
|                      | + Add Data Field                   |   |   |
|                      |                                    |   | Save Task Car                               |
|                      |                                    |   |   |

2. If it is not required that this Data Field is entered to complete the task, uncheck the box next to "required"

| • | <u>Instrume</u> | Task Links to Controls/Reagents None ~  |
|---|-----------------|---|
|   | <u>Manufac</u>  | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever t |
|   | <u>Model #</u>  | Data Fields   |
| • | <u>Controls</u> | required 🗆 Is Confidential  |
|   | + Ac            | Field Label Example: PH Level   |
|   | Would           | Field Type  |
|   | + Ac            | ➡ Add Data Field  |

# 3. If data is confidential, check the box next to "Is Confidential"

| Manufac   Model #   Model #   Data Fields     I + Ac   Field Label   Field Type   Example: PH Level                      |           | trume Task Links    | to Controls/Reagents        | None ~  |
|--|-----------|---------------------|-----------------------------|---|
| Model #   Data Fields   Controls   required Is Confidential   Field Label   Field Type                                   | <u>Ma</u> | NOTE: Linkir        | g a Task to a Controls/Reag | gents prompts the user to update the Acceptable Values whenev |
| <ul> <li>✓ Controls</li> <li>✓ required □ Is Confidential</li> <li>Field Label</li> <li>Field Type</li> <li>✓</li> </ul> | Mo        | del #<br>Data Field | S                           |   |
| + Ac     Field Label     Example: PH Level       Field Type  |           | ntrols              | Confidential                |   |
| Field Type   |           | + Ac Field Label    |                             | Example: PH Level   |
| Mould  |           | Field Type          | ~                           | •   |
| would  | W         | ould                |                             |   |

# 4. Enter the Label you want on this field

|                              | nstrume Ta         | ask Links to Controls/Reagents None ~   |
|------------------------------|--------------------|---|
| Ν                            | Manufac No         | OTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo |
| Ν                            | <u>Nodel #</u> D   | ata Fields  |
| <ul> <li><u>c</u></li> </ul> | Controls           | required 🗆 Is Confidential  |
|                              | + Ac Ei            | eld Label Example: PH Level   |
|                              | Fi<br><b>Nould</b> | eld Type  |
|                              | <b>+</b> Ac        | + Add Data Field  |
| (ip)                         | >>                 |   |

# 5. From the drop down box next to Field Type, Select "Defined Value"

| Manufac<br>Model # | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the |
|--------------------|---|
|                    | Data Fields   |
| <u>Controls</u>    | ✓ required □ Is Confidential  |
| + Ac               | Field Label Inspection Results Example: PH Level  |
| _                  | Field Type  |
| Would              |   |
| + Ac               | + Add Data Field  |
|                    |   |
| (ip >>             |   |
|                    |   |

#### 6. Add as many possible outcomes for the task as necessary

| Manufac          | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the |
|------------------|---|
| <u>Model #</u> . | Data Fields   |
| <u>Controls</u>  | required 🗆 Is Confidential  |
| + Ac             | Field Label Inspection Results Example: PH Level  |
|                  | Field Type Defined Value ~  |
| Would            | Validate Field  |
| TA               | Pass   Acceptable   * remove  |
|                  | + Add More Validation   |
| (ip >>           |   |
|                  | + Add Data Field  |

# 7. For each Acceptable field, check the box next to "Acceptable"

| <u>Manufac</u> | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo |
|----------------|--|
| <u>Model #</u> | Data Fields  |
| Controls       | required 🗆 Is Confidential   |
| <b>+</b> Ac    | Field Label Inspection Results Example: PH Level   |
|                | Field Type Defined Value ~   |
| Would          | Validate Field   |
| <b>T</b> AC    | Pass Zcceptable remove   |
|                | Fail   Acceptable  remove  |
| (ip >>         | + Add More Validation  |

8. Select "Save Task" when you have added all the data fields necessary for the maintenance task

| love |           |        |  |
|------|-----------|--------|--|
| nove |           |        |  |
|      |           |        |  |
|      |           |        |  |
|      | Save Task | Cancel |  |

9. When you have completed the rest of the instrument's tasks select "Finish"

| Frequ        | ency: Unscheduled |               |  |
|--------------|-------------------|---------------|--|
| Fixed        | Schedule: NO      |               |  |
| <u>Tags:</u> | Enter a new tag   |               |  |
| Affect       | s Compliance: YES |               |  |
| Data F       | ields:            |               |  |
| Inst         | pection Results   | Defined Value |  |
| + Add Mainte | enance Task       |               |  |
|              |                   |               |  |
| Cancel       |                   |               |  |

# Add a Data Field for a File Attachment

Attach a file, PDF document to a maintenance Task.

Data fields are entered within a Maintenance Task. If you haven't already started entering your Maintenance Task, select the link below then refer back to this page. Add a Maintenance Task

Steps to Add a Data Field for Attaching a File:

1. Under the maintenance task information you have already entered select "+ Add Data Field"

| <ul> <li>✓ Co</li> </ul> | *                                  | Y   |   |
|--------------------------|------------------------------------|---|---|
| E                        | Affects Compliance                 |   |   |
| 1                        | Task Links to<br>Controls/Reagents | None ~  |   |
| <u>1</u>                 | NOTE: Linking a Task to a Cor      | ntrols/Reagents prompts the user to update th | he Acceptable Values whenever the Lot chang |
|                          | Data Fields                        |   |   |
|                          | + Add Data Field                   |   |   |
|                          |                                    |   | Save Task Car                               |
|                          | Monthly OC Log                     | File  | Attachment                                  |

2. If it is not required that this Data Field is entered to complete the task, uncheck the box next to "required"

|   | <u>Instrume</u> | Task Links to Controls/Reagents None ~  |
|---|-----------------|---|
|   | <u>Manufac</u>  | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the |
|   | <u>Model #</u>  | Data Fields   |
| • | <u>Controls</u> | required 🗆 Is Confidential  |
|   | + Ac            | Field Label Example: PH Level   |
|   | Would           | Field Type ~  |
|   | + Ac            | + Add Data Field  |

# 3. If data is confidential, check the box next to "Is Confidential"

| Manufac   Model #   Model #   Data Fields     I + Ac   Field Label   Field Type   Example: PH Level                      |           | trume Task Links    | to Controls/Reagents        | None ~  |
|--|-----------|---------------------|-----------------------------|---|
| Model #   Data Fields   Controls   required Is Confidential   Field Label   Field Type                                   | <u>Ma</u> | NOTE: Linkir        | g a Task to a Controls/Reag | gents prompts the user to update the Acceptable Values whenev |
| <ul> <li>✓ Controls</li> <li>✓ required □ Is Confidential</li> <li>Field Label</li> <li>Field Type</li> <li>✓</li> </ul> | Mo        | del #<br>Data Field | S                           |   |
| + Ac     Field Label     Example: PH Level       Field Type  |           | ntrols              | Confidential                |   |
| Field Type   |           | + Ac Field Label    |                             | Example: PH Level   |
| Mould  |           | Field Type          | ~                           | •   |
| would  | W         | ould                |                             |   |

#### 4. Enter the Field Label

. . . .

| <b>(</b> | <u>Instrume</u> | Task Links to Controls/Reagents None ~   |
|----------|-----------------|--|
|          | <u>Manufac</u>  | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo |
|          | <u>Model #</u>  | Data Fields  |
| ~        | <u>Controls</u> | ✓ required □ Is Confidential   |
|          | + Ac            | Field Label Example: PH Level  |
| _        | Would           | Field Type ~   |
|          | + Ac            | ➡ Add Data Field   |
|          |                 |  |
| ( ) ip   | >>              |  |

# 5. From the drop down box next to Field Type, Select "File Attachment"

| Data Fields                                  |
|--|
| ✓ required □ Is Confidential                 |
| Field Label Monthly QC Log Example: PH Level |
| Field Type                                   |

6. This will provide the user a button to select to attach a file

### 7. Select "Save Task" when you have added all the data fields necessary

| s the user to update the Acceptable Values whenever the Lot changes |           |          |  |
|---|-----------|----------|--|
|   |           |          |  |
|   |           |          |  |
|   |           |          |  |
|   | (Clone)   | × remove |  |
|   |           |          |  |
| ample: PH Level   |           |          |  |
|   |           |          |  |
|   |           |          |  |
|   |           |          |  |
|   |           |          |  |
|   |           |          |  |
|   |           |          |  |
|   | Covo Took | Capaci   |  |
|   | Save Task | Cancer   |  |
|   |           |          |  |

#### 8. When you have completed the rest of the instruments tasks select "Finish"

| Fixed Schedule: NO                       |                 |
|--|-----------------|
| Tags: Enter a new tag                    |                 |
| Affects Compliance: YES                  |                 |
| <u>Data Fields</u> :                     |                 |
| Monthly QC Log                           | File Attachment |
| <ul> <li>Add Maintenance Task</li> </ul> |                 |
| Cancel                                   |                 |

# Add a Maintenance Task that Uses a Reagent/Control

Adding maintenance tasks can be done when creating a new instrument type or editing a current instrument's tasks. First follow the steps in the links below. Then when you are ready refer back to this page if you need to add a maintenance task that uses a reagent or control.

#### Add a New Instrument

Edit an Existing Instrument

The purpose of this option is to require that the lot used in a task is specified. This will assure the lot is logged and valid.

Before you begin the steps below you should have already added the names of your Reagents or Controls when the instrument type was added. If not, select the link above to Add a New Instrument or Edit an Existing Instrument.

Steps to Add a Maintenance Task that uses a Reagent or Control:

|        |       |             |    |   | ×         |
|--------|-------|-------------|----|---|-----------|
|        |       |             | Si | DASHBOARD   | >         |
|        |       |             |    | INSTRUMENTS                                       | >         |
| Search | Tags: | Enter a Tag |    | REPORTS   | >         |
|        |       |             |    | ADMINISTRATION                                    | >         |
|        |       |             |    |   |           |
|        |       |             |    | Logged in as:<br>L TAYLOR GILBERT (ID:847) (Train | ning Lab) |
|        |       |             |    |   | logout    |
|        |       |             |    | software by                                       |           |

1. Select "Administration" from the Menu

2. Select the "Instruments" tab

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| ments & U  | nits  |      |        | Instruments |   |              |          | User              |
|--|---|------|--------|-------------|---|--------------|----------|-------------------|
|  |   |      |        |             |   |              |          |                   |
|  |   |      |        |             |   |              |          |                   |
|  |   |      |        |             |   |              |          |                   |
|  |   |      |        |             |   |              |          |                   |
|  |   |      |        |             |   |              |          |                   |
|  |   |      |        |             |   |              |          |                   |
|  |   |      |        |             |   |              |          |                   |
|  |   |      |        |             |   |              |          |                   |
| elect the  | desired Instrum   | ient |        |             |   |              |          |                   |
| elect the o  | desired Instrum<br>nt Lists                               | ient |        |             |   |              |          |                   |
| elect the o<br>Instrume<br>Search  | desired Instrum<br>nt Lists<br>Search                     | ent  | Sites: | Show All    | • | Departments: | Show All |                   |
| elect the of Instrume<br>Search  | desired Instrum<br>nt Lists<br>Search                     | ient | Sites: | Show All    | • | Departments: | Show All |                   |
| elect the of<br>Instrume<br>Search<br>Accu-Ch                                  | desired Instrum<br>nt Lists<br>Search                     | lent | Sites: | Show All    | • | Departments: | Show All | Ins               |
| elect the of<br>Instrume<br>Search<br>Accu-Ch<br>Acetone                       | desired Instrum<br>nt Lists<br>Search<br>lek Inform II QC | lent | Sites: | Show All    |   | Departments: | Show All | Ins               |
| elect the of<br>Instrume<br>Search<br>Accu-Ch<br>Acetone<br>Amniotes           | desired Instrum<br>nt Lists<br>Search<br>lek Inform II QC | lent | Sites: | Show All    |   | Departments: | Show All | Ins               |
| elect the of<br>Instrume<br>Search<br>Accu-Ch<br>Acetone<br>Amniotes<br>Ana-ID | desired Instrum<br>nt Lists<br>Search<br>lek Inform II QC | ent  | Sites: | Show All    |   | Departments: | Show All | Ins<br>Ins<br>Ins |

API

Instrum

#### 4. Select "Edit" located beside the bolded Instrument Name

|        | Sites: | Show All | ~           | Departments:     | Show All    | -             | Units: | Show All |
|--------|--------|----------|-------------|------------------|-------------|---------------|--------|----------|
|        |        |          |             |                  |             |               |        |          |
|        |        |          |             |                  |             |               |        |          |
|        |        |          |             |                  |             | Instruments : | 1      |          |
|        |        |          |             |                  |             | Instruments : | 1      |          |
| 1      |        |          | Aceton      | e QC (Edit) (Clo | one)        |               |        |          |
|        |        |          | 1. Acetone  | QC (Edit) (Clor  | <u>ne</u> ) |               |        |          |
|        |        |          | Site: Train | ning Lab         |             |               |        |          |
|        |        |          | Bench / U   | nit: Chemistry   |             |               |        |          |
|        |        |          | ell id: 157 |                  |             |               |        |          |
| o data |        |          | 1           |                  |             |               |        |          |

#### 5. Select the "+ Add Maintenance Task" button

|          | Affects Compliance: YES                           | ols   |
|----------|---|---|
| + Ad     | Level 0<br>Level 1<br>Level 2<br>Maintenance Task | Defined Value<br>Defined Value<br>Defined Value |
| inish Ca | ancel   |   |

| Biorex           | Add Maintenance Task |  |
|------------------|----------------------|--|
| Certifi          | Maintenance Task     | Enter Maintenance Task<br>Example: Run Level 1 QC  |
| iremen<br>m Bior | Notes (Optional)     | * Maximum 5000 characters allowed<br>B $I \ \cup \ \ominus \ H_1 \ H_2 \ \equiv \ \equiv \ x_2 \ x^2 \ \equiv \ \blacksquare \ * \mathbb{T}$ Normal<br>Normal $\div \ \underline{A} \ \underline{\times}$ Sans Serif $\div \ \equiv \ \underline{T}_x \ \underline{\diamond}$<br><i>Enter Notes here</i> |
| urs (            | Frequency            | ~  |
|                  | □ Fixed Schedule     |  |

7. Add a note if necessary, this note will appear under the task for the user when task is selected to be marked as complete

|          |                  | uun |  |  |  |  |  |  |  |
|----------|------------------|-----|--|--|--|--|--|--|--|
|          | Maintenance Task |     | Perform Level 1 QC   |  |  |  |  |  |  |
| <u>1</u> | Notes (Optional) |     | Kaximum 5000 characters allowed  |  |  |  |  |  |  |
|          |                  |     | B $I \ \bigcup \ \ominus \ H_1 \ H_2 \ \equiv \ \equiv \ x_2 \ x^2 \ \equiv \ \blacksquare \ \bullet \ \mathbb{N}$ Normal $\Rightarrow \ A \ A \ Sans Serif \ \Rightarrow \ \Box \ T_x \ \diamondsuit$ |  |  |  |  |  |  |
|          |                  |     | Enter Notes here   |  |  |  |  |  |  |
|          |                  |     |  |  |  |  |  |  |  |
|          | Frequency        |     | ~  |  |  |  |  |  |  |
|          | Fixed Schedule   |     |  |  |  |  |  |  |  |
|          | Starts HH :      | MM  | Repeats Every ~  |  |  |  |  |  |  |

8. Select the fixed schedule or frequency of the task from the drop down list (if the frequency you need is not listed please email ELL at support@lablogs.co with the desired frequency)

|       |               |         |    | B I<br>Normal | U <del>S</del><br>€ | H1 H2 | l⊟ ∷⊟<br>Sans Serif | x₂ x²<br>€ ≡ | Œ ⋿<br><i>⊺</i> x | ₽¶<br>& |
|-------|---------------|---------|----|---------------|---------------------|-------|---------------------|--------------|-------------------|---------|
|       | Frequency     | ule     |    |               |                     |       |                     |              |                   |         |
|       | Starts        | HH :    | MM |               |                     |       | Repe                | ats Every    |                   | ~       |
| inish | ✓ Affects Com | pliance |    |               |                     |       |                     |              |                   |         |

#### 9. Check the box if this task Affects Compliance (check is defaulted)

|                    |                 |                |             | Enter Notes here                       |                       |                  |  |  |  |
|--------------------|-----------------|----------------|-------------|--|-----------------------|------------------|--|--|--|
|                    |                 |                |             |  |                       |                  |  |  |  |
|                    | Frequency       |                |             |  |                       |                  |  |  |  |
|                    | □ Fixed Sched   | ule            |             |  |                       |                  |  |  |  |
|                    |                 | ~              | ^           |  |                       |                  |  |  |  |
|                    | Starts          | HH :           | MM          |  | Repeats Every         | ~                |  |  |  |
|                    |                 | ~              | *           |  |                       |                  |  |  |  |
| Affects Compliance |                 |                |             |  |                       |                  |  |  |  |
| Tinish             | Task Links to C | controls/Rea   | gents       | None ~                                 |                       |                  |  |  |  |
|                    | NOTE: Linking a | Task to a Cont | rols/Reagen | ts prompts the user to update the Acce | ptable Values wheneve | er the Lot chang |  |  |  |

10. Below "Task Uses Lots" select the correct reagent or control that is used (you may select as many as necessary)



11. Add the Data Field/s for this task (use the links below for more help)

| rags. Enter a new tag         |  |   |  |  |  |  |
|-------------------------------|--|---|--|--|--|--|
|                               | Task Links to Controls/Reagents  | None  |  |  |  |  |
| Affects Compliance: YES       |  |   |  |  |  |  |
| 🔗 Used Lots: k-Check Table    | NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptabl |   |  |  |  |  |
| 🔗 Used Lots: 🛛 Biorex Labs K- |  |   |  |  |  |  |
| 🔗 Used Lots: Certified Time   | Task Uses Lots   |   |  |  |  |  |
| Data Fields:                  | □ k-Check Tablets  |   |  |  |  |  |
|                               | Biorex Labs K-Check Serum Controls   |   |  |  |  |  |
| Level 0                       | Certified Timer  |   |  |  |  |  |
| Level 1<br>Level 2            | NOTE: If a Task Uses a Lot, the user is rec  | uired to specify the Lot before completing th |  |  |  |  |
| + Add Maintenance Task        | + Add Data Field   |   |  |  |  |  |
| ish Cancel                    |  |   |  |  |  |  |

#### 12. Select "Save Task"

| ~  |           |        |  |
|--|-----------|--------|--|
| e the Acceptable Values whenever the Lot changes |           |        |  |
|  |           |        |  |
|  |           |        |  |
|  |           |        |  |
| ecompleting the Task.                            |           |        |  |
|  |           |        |  |
|  |           |        |  |
|  | Save Task | Cancel |  |
|  |           |        |  |

#### 13. When you have finished editing the instrument select "Finish"

| 2 <u>Maintenance Task Name</u> : Check Certified Timer ( <u>Edit</u> ) ( <u>Clone</u> )  | × remove |
|--|----------|
| Frequency: Unscheduled   |          |
| Fixed Schedule: NO   |          |
| Tags: Enter a new tag  |          |
| Affects Compliance: YES  |          |
| 🔗 Used Lots: Certified Timer   |          |
| Add Maintenance Task     Add Maintenance Task |          |
|  |          |
| Cancel   |          |

Add a Data Field for Text Add a Data Field with a Number Value Add a Data Field with Defined Values (ex. POS/NEG) Add a Data Field that accepts a File Attachment

# Add a Maintenance Task that is Linked to a Reagent or Control

Adding maintenance tasks can be done when creating a new instrument type or editing a current instrument's tasks. First follow the steps in the links below. Then when you are ready refer back to this page if you need to add a maintenance task that is linked to a reagent or control.

#### Add a New Instrument

#### Edit an Existing Instrument

The purpose of linking a task to a reagent or control is to add data fields to the lot. If you need to run QC on a lot, and lot specific data needs to be recorded, this is where you add those fields and all the possible values. When you add the lot you select which values are acceptable (pass) and which are not (fail).

Before you begin the steps below you should have already added the names of your Reagents or Controls when the instrument type was added. If not select the link above to Add a New Instrument.

Steps to Add a Maintenance Task that is Linked to a Reagent or Control:

1. If you haven't already, add the name of the Reagent or Control this task is to be linked to using this article if needed. Add a Control/Reagent

2. Select the "+ Add Maintenance Task" button

| Model                       | <u>#</u> :                |                    |                 |   |
|-----------------------------|---------------------------|--------------------|-----------------|---|
| <ul> <li>Control</li> </ul> | ls/Reagents Requirements: | E. Coli ATCC 25922 | (Edit) × remove | 0 |
| + A                         | dd Controls/Reagents Requ | uirement           |                 |   |
| + 4                         | dd Maintenance Task       |                    |                 |   |
| Finish                      | Cancel                    |                    |                 |   |
|                             |                           |                    |                 |   |
|                             |                           |                    |                 |   |

# 3. Enter the name of the task to be completed

| Task  |
|---|
| racters allowed   |
| racters allowed   |
|   |
| H1 H2 $\equiv \equiv x_2 x^2 \equiv \equiv \mathbf{M}$ Normal |
| A Sans Serif 🗧 🔤 🗛 🗞  |
|   |
|   |
|   |
|   |
|   |

4. Add a note if necessary, this note will appear under the task for the user when task is selected to be marked as complete

|          |               |           | uun            |                      |                     |        |                     |                         |          |         |      |
|----------|---------------|-----------|----------------|----------------------|---------------------|--------|---------------------|-------------------------|----------|---------|------|
|          | Maintenance   | Fask      |                | Perform Level 1 QC   |                     |        |                     |                         |          |         |      |
| <u>1</u> | Notes (Option |           | Example: R     | un Level<br>n 5000 c | 1 QC<br>haracters a | llowed |                     |                         |          |         |      |
|          |               |           |                | B I<br>Normal        | ⊻ <del>S</del>      | H1 H2  | Ì⊒ ∷≣<br>Sans Serif | $x_2 x^2$<br>$z \equiv$ | Ξ.<br>Ξ× | ₽¶<br>& | Norr |
|          |               |           |                | Enter No             | tes here.           |        |                     |                         |          |         |      |
|          |               |           |                |                      |                     |        |                     |                         |          |         |      |
|          | Frequency     |           |                |                      |                     |        |                     |                         |          |         | ~    |
|          | □ Fixed Scheo | dule      |                |                      |                     |        |                     |                         |          |         |      |
|          | Starts        | ►<br>HH : | <b>∧</b><br>MM |                      |                     |        | Repe                | ats Every               |          | $\sim$  |      |

5. Select the fixed schedule or frequency of the task from the drop down list (if the frequency you need is not listed please email ELL at support@lablogs.co with the desired frequency)

| Notes (Optior | nal) |    | * Maximum 5000 characters allowed                 |
|---------------|------|----|---|
|               |      |    | B I U ⊖ H1 H2 Ἐ Ἐ X2 X <sup>2</sup> Œ Œ ▶¶ Normal |
|               |      |    | Normal = <u>A</u> A Sans Sent = <u>I</u> x VS     |
|               |      |    | Enter Notes here                                  |
|               |      |    |   |
|               |      |    |   |
| Frequency     |      |    |   |
| □ Fixed Sche  | dule |    |   |
|               | ^    | ^  |   |
| Starts        | HH : | MM | Repeats Every 🗸                                   |
|               | ~    | ~  |   |

6. Check the box if this task Affects Compliance (check is defaulted)

|       |                 |                |             | Enter Notes here                    |                        |                   |
|-------|-----------------|----------------|-------------|-------------------------------------|------------------------|-------------------|
|       |                 |                |             |                                     |                        |                   |
|       | Frequency       |                |             |                                     |                        |                   |
|       | Fixed Sched     | dule           |             |                                     |                        |                   |
|       |                 | ~              | ~           |                                     |                        |                   |
|       | Starts          | HH :           | MM          |                                     | Repeats Every          | ~                 |
|       |                 | *              | *           |                                     |                        |                   |
|       | Affects Con     | npliance       |             |                                     |                        |                   |
| inish | Task Links to ( | Controls/Rea   | igents      | None ~                              |                        |                   |
|       | NOTE: Linking a | Task to a Cont | rols/Reagen | ts prompts the user to update the A | cceptable Values whene | ver the Lot chang |

# 7. From the dropdown box next to "Task Links to" select the correct reagent or control

|  | ~  | ~                     |      |                |            |            |           |          |              |
|--|--|-----------------------|------|----------------|------------|------------|-----------|----------|--------------|
| Starts   | HH   | : MI                  |      |                |            | Repeat     | s Every   |          | ~            |
|  | ~  | ~                     |      |                |            |            |           |          |              |
| Affects Co                                     | mpliance                                       |                       |      |                |            |            |           |          |              |
|  |  |                       |      |                |            |            |           |          |              |
|  |  |                       |      |                |            |            |           |          |              |
|  |  |                       |      |                |            |            |           |          |              |
| ask Links to                                   | Controls/I                                     | Reagent               | None | ×              |            |            |           |          |              |
| ask Links to                                   | Controls/I                                     | Reagent               | None |                |            |            |           |          |              |
| ask Links to<br>OTE: Linking                   | Controls/I<br>a Task to a C                    | Reagent<br>Controls/R | None | user to update | e the Acce | eptable Va | alues whe | never th | e Lot change |
| ask Links to                                   | Controls/I<br>a Task to a C                    | Reagent<br>Controls/R | None | user to update | e the Acce | eptable Va | alues whe | never th | e Lot change |
| Task Links to<br>NOTE: Linking<br>Task Uses Lo | Controls/I<br>a Task to a C<br>ots             | Reagent<br>Controls/R | None | user to update | e the Acce | eptable Va | alues whe | never th | e Lot change |
| Task Links to<br>NOTE: Linking<br>Fask Uses Lo | Controls/I<br>a Task to a C<br>ots<br>TCC 2592 | Reagent<br>Controls/R | None | user to update | e the Acce | eptable Va | alues whe | never th | e Lot chang  |

#### 8. Add the Data Field/s for this task (use the links below for more help)



9. When you link tasks to a reagent or control you will not define the acceptable values until you enter in the Lot number as a user

#### 10. Select "Save Task"

| the Acceptable Values whenever the Lot changes |                  |          |  |
|--|------------------|----------|--|
|  |                  |          |  |
|  | ( <u>Clone</u> ) | × remove |  |
|  |                  |          |  |
| is entered)                                    |                  |          |  |
|  |                  |          |  |
|  | Save Task        | Cancel   |  |

#### 11. When you have finished editing the instrument select "Finish"

| <u>Frequency</u> : Every<br><u>Fixed Schedule</u> : N | 90 Days, Lead time 24 hrs, Overdue after 24 hrs<br>O |
|---|--|
| Tags: Enter a new                                     | tag  |
| Affects Compliance                                    | 2: YES   |
| Data Fields: (Accept                                  | ntrols/Reagents E. Coli ATCC 25922                   |
| Colony Count  | Number   |
| ➡ Add Maintenance Task                                |  |
|   |  |
|   |  |
| Cancel  |  |

Add a Data Field for Text Add a Data Field with a Number Value Add a Data Field with Defined Values (ex. POS/NEG) Add a Data Field that accepts a File Attachment

# Add a New Maintenance Task to Existing Instrument

Steps to Add a New Task:

1. Go to the "Administration" page from the menu

|    | DASHBOARD → TASK                   | S                     |   | ×        |
|----|------------------------------------|-----------------------|---|----------|
| ks | 8                                  | Nan                   | DASHBOARD                                       | >        |
|    |                                    |                       | INSTRUMENTS                                     | >        |
| •  | Departments: Show All              | Units: Show A         | REPORTS   | >        |
|    | Tags: Enter a Tag                  |                       | ADMINISTRATION                                  | >        |
|    |                                    |                       | Logged in as:<br>TAYLOR GILBERT (ID:847) (Train | ing Lab) |
| A  | cetone QC <u>View Instrument</u> > | View Maintenance Logs | software by                                     | logout   |
|    |                                    |                       | Electronic Lab Logs In                          | ~        |

2. Select the "Instruments" tab

| es  | Departments & Units | Users Users     |
|-----|---------------------|-----------------|
| 5   |                     |                 |
| Lab |                     | Last 90 Days Co |
| Lab |                     | Last 90 Days    |

# 3. Select your instrument

| Platelet Incubator           | Instruments : 1 | Last 90 |
|------------------------------|-----------------|---------|
| POC Bench                    | Instruments : 1 | Last 90 |
| Previ Color V2 Preve         | Instruments : 1 | Last 90 |
| RapidOne                     | Instruments : 1 | Last 90 |
| Refrigerator                 | Instruments : 1 | Last 90 |
| Refrigerator                 | Instruments : 1 | Last 90 |
| Refrigerator (2°C-8°C)       | Instruments : 3 | Last 90 |
| Refrigerator (2C-6C w/Alarm) | Instruments : 2 | Last 90 |
| Refrigerator (2C-8C)         | Instruments · 2 | Last 9/ |

4. Select the "Edit" button next to the bolded instrument name

| POC Bench            | instruments : 1               | Last 90 Day |
|----------------------|-------------------------------|-------------|
| Previ Color V2 Preve | Instruments : 1               | Last 90 Day |
| RapidOne             | Instruments : 1               | Last 90 Day |
| Refrigerator         | Instruments : 1               | Last 90 Day |
|                      | Refrigerator (Edit) (Clone)   | +           |
| [A                   | 1.Refrigerator (Edit) (Clone) | Status      |
|                      | Site: Training Lab            | View M      |
|                      | Department: Microbiology      | View        |
|                      | Bench / Unit: Microbiology    | Contro      |
| Last 90 Days         | ell id: 204                   |             |
| No data              | 123                           |             |
| Documents(0)         |                               |             |

5. Scroll to the bottom and select "Add Maintenance Task"

| Maintenance Task Name: Wipe Down Exterior (Edit) (Clone) * remove |
|---|
| Frequency: Daily, Lead time 3 hrs, Overdue after 5 hrs            |
| Tags: Enter a new tag   |
| Affects Compliance: YES  Add Maintenance Task                     |
| sh Cancel   |

6. Complete the form

| ait inst        | Add Maintenanc        | e Task  |
|-----------------|-----------------------|---|
| Instrue<br>Name | Maintenance Task<br>n | Enter Maintenance Task<br>Example: Run Level 1 QC   |
| Manuf<br>Model  | Notes (Optional)<br>a | • Maximum 5000 characters allowed<br>B I U ↔ H1 H2 Ἐ Ἐ X₂ X² Ἐ Ἐ •¶<br>Normal ÷ Normal ÷ Ă ‰ Sans Serif ÷ ☱<br>I <sub>x</sub> � |
| Contro<br>+     | <u>)</u> :<br>A       | Enter Notes here  |

### 7. Select "Save Task"

| HH ;                              | MM                   | Repeats Every                  | ~                           |            |  |
|-----------------------------------|----------------------|--------------------------------|-----------------------------|------------|--|
| Ƴ<br>Compliance                   | *                    |                                |                             |            |  |
| to<br>eagents                     | None 🗸               |                                |                             |            |  |
| ig a Task to a Cont<br>Data Field | rols/Reagents prompt | s the user to update the Accep | table Values whenever the L | ot changes |  |
|                                   |                      |                                | Save Task                   | Cancel     |  |

8. If the task isn't in the desired location, you can "drag and drop" it by using the task number box.

| <u>е</u> | admin 🔶 instruments  |  |  |  |  |
|----------|--|--|--|--|--|
|          | Tags: Enter a new tag  |  |  |  |  |
|          | Affects Compliance: YES  |  |  |  |  |
|          |  |  |  |  |  |
| 2        | Maintenance Task Name: Wipe Down Exterior (Edit) (Clone) <b>X</b> remove |  |  |  |  |
|          | Frequency: Daily, Lead time 3 hrs, Overdue after 5 hrs                   |  |  |  |  |
|          | Fixed Schedule: NO   |  |  |  |  |
|          | Tags: Enter a new tag  |  |  |  |  |
|          | Affects Compliance: YES  |  |  |  |  |
|          | Add Maintonanaa Taak   |  |  |  |  |

9. Select "Finish" when you are finished

| 2 | Maintenance Task Name: Wipe Down Exterior (Edit) (Clone) <b>x</b> remove<br><u>Erequency</u> : Weekly, Lead time 24 hrs, Overdue after 24 hrs |
|---|---|
|   | Tags:       Enter a new tag         Affects Compliance:       YES   |
|   | Cancel  |

# **Edit an Existing Maintenance Task**

Edit / Change a maintenance task. Ex: Frequency, used / linked reagents and controls, title / name, data field, etc. Locate Changes to task

This may only be completed by an administrator. Steps to Edit a Task:

1. Go to "Administration" from the menu

|       | DASHBOARD 🔶 TASKS            |                     |   | ×         |
|-------|------------------------------|---------------------|---|-----------|
| Tasks | 0                            | N                   | DASHBOARD                                       | >         |
|       |                              |                     | INSTRUMENTS                                     | >         |
| •     | Departments: Show All        | Units:              | REPORTS   | >         |
|       | Tags: Enter a Tag            |                     | ADMINISTRATION                                  | >         |
|       |                              |                     | Logged in as:<br>LayLor GILBERT (ID:847) (Train | ning Lab) |
|       | Acetone QC View Instrument > | liew Maintenance Li | software by                                     | logout    |

2. Select the "Instruments" tab

| Sites Departments & Units Unstruments Users |          |
|---|----------|
| te Lists                                    |          |
|   |          |
| aining Lab Last 90 Days (                   | Complian |
| f Site Lab Last 90 Days                     | No       |

# 3. Select your instrument

| Embedding Console                  | Instruments : 1 |
|------------------------------------|-----------------|
| Eye Wash                           | Instruments : 1 |
| FMH Parallel QC                    | Instruments : 1 |
| Freezer                            | Instruments : 1 |
| Freezer Temperature (-20C w/Alarm) | Instruments : 1 |
| Freezer Temperature (-31/-10C)     | Instruments : 1 |
| Frozen Section                     | Instruments : 1 |
| Gastroccult                        | Instruments : 1 |

4. Select the "Edit" button next to the bolded instrument name

| Embedding Console | Instruments : 1   |  |
|-------------------|---|--|
| Eye Wash          | Instruments : 1   |  |
| FMH Parallel QC   | Instruments : 1   |  |
| Freezer           | Instruments : 1   |  |
|                   |   |  |
|                   | Freezer (Edit) (Clone)  |  |
|                   | Freezer (Edit) (Clone)<br>1.Freezer 1 (Edit) (Clone)  |  |
|                   | Freezer (Edit) (Clone)<br>1. Freezer 1 (Edit) (Clone)<br>Site: Training Lab   |  |
| ][                | Freezer (Edit) (Clone)<br>1. Freezer 1 (Edit) (Clone)<br>Site: Training Lab<br>Department: Chemistry<br>Bench (Unit: Chemistry                |  |
| ][                | Freezer (Edit) (Clone)<br>1. Freezer 1 (Edit) (Clone)<br>Site: Training Lab<br>Department: Chemistry<br>Bench / Unit: Chemistry<br>ell id: 55 |  |

5. Select the "Edit" or "Update" button next to the task you want to edit (See Note below)

| Controls/Reagents Requirements: None  |
|---|
|   |
| Maintenance Task Name:       Record Temperature (°C)       (Clone)       ★ remove         Fixed Schedule:       YES         Schedule Hours:       24 Hours       07:00         Tags:       Enter a new tag         Affects Compliance:       YES         Data Fields: |

#### 6. Make the necessary changes

7. Select "Save Task"

| Fields  |                   |                                  |  |
|---|-------------------|----------------------------------|--|
| uired<br>abel Attach Certification<br>ype File Attachment ~ | Example: PH Level | ( <u>Clone</u> ) <b>X</b> remove |  |
| dd Data Field   |                   |                                  |  |

8. If the task isn't in the desired location, you can "drag and drop" it by using the task number box

| e | ADMIN 🔶 INSTRUMENTS  |  |
|---|--|--|
| - | <ul> <li>Add Controls/Reagents Requirement</li> </ul>  |  |
|   | Maintenance Task Name:       Record Temperature (°C) (Edit) (Clone)       ★ remove         Fixed Schedule:       YES         Schedule Hours:       24 Hours       07:00         Tags:       Enter a new tag         Affects Compliance:       YES         Data Fields: |  |

9. Be sure to select "Finish" when finished

| E       | requency: Every 6 Months, Lead time 168 hrs, Ove | erdue after 168 hrs |
|---------|--|---------------------|
| E       | ixed Schedule: NO                                |                     |
| I       | ags: Enter a new tag                             |                     |
| A       | Affects Compliance: YES                          |                     |
| D       | Attack Cartification                             | File Attachment     |
| + Add N | Attach Certification<br>Maintenance Task         | File Attachment     |
|         |  |                     |
| Can     | cel  |                     |

Note for Step 5:

| 11 | Maintenance Task Name: Clean the Filters (Delete) (Update) (Clone) This is what your screen will look like when the task has previously been completed. |
|----|---|
|    | Frequency: Every 30 Days +/- 7 days, Lead time 168 hrs, Overdue after 168 hrs   |
|    | Fixed Schedule:       NO       For Step 5, select Update         to edit the task when it looks like this.       Iooks like this.                       |
|    | Tags: Enter a new tag   |
|    | Affects Compliance: YES   |
| 12 | Maintenance Task Name: Drain the Vacuum Tank (Edit) (Clone) 🗱 remove  |
|    | Frequency: Unscheduled This is what your screen will look like when the task has never been completed.  |
|    | Fixed Schedule: NO<br>For Step 5, selet Edit to   |
|    | Tags:Enter a new tagedit the task when it<br>looks like this.   |
|    | Affects Compliance: YES   |

Changes to a Maintenance Task can be located using the following steps:

| → T/    | ASKS     |        |       |        |                           | ×           |
|---------|----------|--------|-------|--------|---------------------------|-------------|
|         |          |        |       |        | DASHBOARD                 | >           |
|         |          |        |       |        | INSTRUMENTS               | >           |
| Units:  | Show All | The Se | arch: | Search | REPORTS                   | >           |
|         |          |        |       |        | ADMINISTRATION            | >           |
|         |          |        |       |        | Logged in as:             |             |
| tenance | Logs+    |        |       |        | SANDY STRICKLAND (ID:457) | (Training ) |
|         |          |        |       |        |                           | logout      |
|         |          |        |       |        | software by               |             |

1. Go to "Reports" from the Menu

2. Select "Maintenance Logs" on the left side of the screen

| P                  | MONTHLY REPORTS                      |
|--------------------|--------------------------------------|
| Monthly Reports    | Filters                              |
| Maintenance Logs   | Sites: Show All                      |
| Sites              |                                      |
| Departments        | Showing All Reports                  |
| Benches / Units    | April 2023                           |
| Instruments        | 1 Microbiology Satellite 2           |
| Users              | In Progress                          |
| Compliance Reviews | Last Modified May 01, 2023 00-20 EDT |

3. Apply any needed filters to locate the instrument

|                | Ma       | aintenance Log   | js            |            |       |
|----------------|----------|------------------|---------------|------------|-------|
|                |          | Filters          |               |            |       |
| ✓ Departments: | Show All | ✓ Benches/Units: | Show All      | ~          |       |
| now All        | ~        | Date Range: From | 05/01/2023 To | 05/31/2023 | Apply |
When a Maintenance Task is updated it does not lose it's previous data. All data is maintained within the system. Therefore, a visual indicator has been given to signify a change has been made. Any updated task is indicated with an \* in the Task Title. This only appears on the reports the month the change was made.

In the example below, the Task "Daily Tasks" had a start time of 0800 changed to 0000.

|  |    |     | MAI | NTE | NANC | ELC | DGS | REP | ORT |     |       |       |      |    |    |     |     |    |    |    |    |    |     |     | S  | Scan B | arcod | e III |    |
|--|----|-----|-----|-----|------|-----|-----|-----|-----|-----|-------|-------|------|----|----|-----|-----|----|----|----|----|----|-----|-----|----|--------|-------|-------|----|
|  | _  |     |     |     |      | _   |     |     |     |     | ~     |       |      |    |    |     |     |    |    |    |    |    |     |     |    |        |       |       |    |
|  |    |     |     |     |      |     |     |     |     | L   | ot Su | umma  | ary  |    |    |     |     |    |    |    |    |    |     |     |    |        |       |       |    |
| No Controls/Reagents Present.                |    |     |     |     |      |     |     |     |     |     |       |       |      |    |    |     |     |    |    |    |    |    |     |     |    |        |       |       |    |
|  |    |     |     |     |      |     |     |     |     | C   | Calen | dar \ | /iew |    |    |     |     |    |    |    |    |    |     |     |    |        |       |       |    |
| Dec , 2022 🔹 🕨                               | 03 | 04  | 05  | 06  | 07   | 08  | 09  | 10  | 11  | 12  | 13    | 14    | 15   | 16 | 17 | 18  | 19  | 20 | 21 | 22 | 23 | 24 | 25  | 26  | 27 | 28     | 29    | 30    | 31 |
| KOVA-Trol® III Normal High<br>Package Insert |    | off | off |     |      |     |     |     | off | off |       |       |      |    |    | off | off |    |    |    |    |    | off | off |    |        |       |       |    |
| KOVA-Trol® III Normal High P                 |    | off | off |     |      |     |     |     | off | off |       |       |      |    |    | off | off |    |    |    |    |    | off | off |    |        |       |       |    |
| Kova-Trol III® QC Overlap Inv                |    | off | off |     |      |     |     |     | off | off |       |       |      |    |    | off | off |    |    |    |    |    | off | off |    |        |       |       |    |
| Kova-Trol I® QC Overlap Inve                 |    | off | off |     |      |     |     |     | off | off |       |       |      |    |    | off | off |    |    |    |    |    | off | off |    |        |       |       |    |
| Multistix® QC Overlap Invent                 |    | off | off |     |      |     |     |     | off | off |       |       |      |    |    | off | off |    |    |    |    |    | off | off |    |        |       |       |    |
| Daily Tasks *                                |    | off | off |     |      |     |     |     | off | off |       |       |      |    |    | off | off |    |    |    |    |    | off | off |    |        | 1     |       |    |
| Daily Tasks                                  |    | off | off |     |      |     |     |     | off | off |       |       |      |    |    | off | off |    |    |    |    |    | off | off |    |        |       | -     |    |

- 4. Click on the Task Title with an \*.
- 5. A box will open that shows the date/time and User that made the change along with the details of the original task.

|   | Clinitek® Advantus - Maintenance Task D   | Details               |  | ×     |
|---|---|-----------------------|--|-------|
|   | Change Log :<br>Instrument Type : Clinitek® Advantus<br>Created : April 26, 2022 10:15 AM EST &<br>Updated By : Dec 30, 2022 01:16 PM EST & Joann | n Wilson (ID:387)     |  |       |
| No Controls/Reagents Present.                         | Maintenence Task Name: Daily Tasks<br>Fixed Schedule : YES  |                       |  |       |
| Dec , 2022 < >  | Fixed Schedule Hours: 24 Hours Start Time 08:0<br>Affects Compliance : YES<br>Data Fields :   | MA 00                 |  |       |
| KOVA-Trol® I Abnormal Hi<br>KOVA-Trol® III Normal Hig | <b>Field</b><br>Visual alignemnt of strips ( <u>View Chart</u> )  | Field Type<br>defined | Validate Field<br>(acceptable: Pass)                               |       |
| Kova-Trol III® QC Overlap                             | Software Check by rebooting system ( <u>View</u><br>Chart)<br>Barcode Check ( <i>View</i> Chart)  | defined               | (acceptable: Pass)   |       |
| Multistix® QC Overlap Inve                            | Print Successful Calibration ( <u>View Chart</u> )<br>Daily Maintenance   | defined<br>defined    | (acceptable: Pass)<br>(acceptable: Pass)<br>(acceptable: Complete) |       |
| Daily Tasks *   |   |                       |  |       |
| Instrument Printouts                                  |   |                       |  | Close |

- 6. Select "Close".
- 7. Click on the Task Title without the \* (the new Task) to view the change to the Task.

|                              | Clinitek® Advantus - Maintenance Task D  | Details                |  | ×     |
|------------------------------|--|------------------------|--|-------|
| No Controls/Reagents Present | Change Log :<br>Instrument Type : Clinitek® Advantus<br>Created : Dec 30, 2022 01:16 PM EST & Joann Wil<br><u>Maintenence Task Name:</u> Daily Tasks<br><u>Fixed Schedule :</u> YES<br><u>Fixed Schedule Hours:</u> 24 Hours Start Time 12:0 | Ison (ID:387)<br>00 AM |  |       |
| Dec , 2022 < 🔊               | <u>Affects Compliance :</u> YES<br><u>Data Fields :</u>  |                        |  |       |
| KOVA-Trol® I Abnormal Hi     | Field  | Field Type             | Validate Field                           |       |
| KOVA-Trol® III Normal Hig    | Visual alignemnt of strips ( <u>View Chart</u> )<br>Software Check by rebooting system ( <u>View</u>   | defined<br>defined     | (acceptable: Pass)<br>(acceptable: Pass) |       |
| Kova-Trol III® QC Overlap    | Chart)   |                        |  |       |
| Kova-Trol I® QC Overlap Ir   | Barcode Check ( <u>View Chart</u> )<br>Print Successful Calibration ( <u>View Chart</u> )  | defined                | (acceptable: Pass)<br>(acceptable: Pass) |       |
| Multistix® QC Overlap Inve   | Daily Maintenance  | defined                | (acceptable: Complete)                   |       |
| Daily Tasks *                |  |                        |  |       |
| Daily Tasks                  |  |                        |  | Close |

8. Select "Close" to exit.

### **Delete a Maintenance Task**

May only be completed by an administrator.

#### Steps to Delete a Task:

1. Go to the "Administration" page from the menu

|       | DASHBOARD 🔶 T       | ASKS                    |             |  | ×           |
|-------|---------------------|-------------------------|-------------|--|-------------|
| Tasks | 9                   |                         | N           | DASHBOARD                                    | >           |
|       |                     |                         |             | INSTRUMENTS                                  | >           |
|       | Departments: Show   | w All 👻                 | Units:      | REPORTS                                      | >           |
|       | Tags: Enter a Tag   |                         |             | ADMINISTRATION                               | >           |
|       |                     |                         |             | Logged in as:<br>TAYLOR GILBERT (ID:847) (Tr | aining Lab) |
|       | Acetone QC View Ins | trument <u>View Mai</u> | ntenance Lo | software by                                  | logout      |

2. Select the "Instruments" tab

|    | Departments & Units | Instruments | Users          | System          |
|----|---------------------|-------------|----------------|-----------------|
|    |                     |             |                | + Add           |
| ıb |                     |             | Last 90 Days C | ompliance   100 |
| b  |                     |             | Last 90 Days 🤇 | No data         |

#### 3. Select your instrument

| Last 90 Days   | Instruments : 1 | HIV ag/ab combo               |
|----------------|-----------------|-------------------------------|
| Last 90 Days 🤇 | Instruments : 7 | I-STAT                        |
| Last 90 Days 🤇 | Instruments : 1 | I-STAT Supplies               |
| Last 90 Days 🔘 | Instruments : 1 | Immucor                       |
| Last 90 Days   | Instruments : 2 | Incubator (37 +-2.5)          |
| Last 90 Days 🤇 | Instruments : 1 | Incubator (37 +-2.5) (II C02) |
| Last 90 Days 🤇 | Instruments : 1 | Incubator (41.5-42.5)         |
| Last 90 Days   | Instruments : 1 | Incubator (41.5-42.5)         |
| Last 90 Days 🤇 | Instruments : 2 | Incubator (60+-2)             |

4. Select the "Edit" button next to the bold instrument name

|                | instruments : 7   | Last 90 Days ( No data   |
|----------------|---|--|
| Supplies       | Instruments : 1   | Last 90 Days No data   |
| or             | Instruments : 1   | Last 90 Days Compliance  |
| tor (37 +-2.5) | Instruments : 2   | Last 90 Days No data   |
| -              | Incubator (37 +-2.5) (Edit) (Clone)   | + Add Instrument   |
|                | 1. Incubator 1 ( <u>Edit</u> ) ( <u>Clone</u> )<br>Site: Training Lab<br>Department: Microbiology<br>Bench / Unit: Microbiology<br>ell id: 203<br><b>123456</b> | Status : Online<br>View Maintenance Logs<br>View Instrument<br>Controls/Reagents |
| ) Days         | versionalitate<br>  |  |

5. Select the "X remove" button next to the maintenance task you want to delete

| Requirements: None   |
|--|
| /Reagents Requirement New Features   |
| <u>KName</u> : Record Temperature (°C) ( <u>Edit</u> ) ( <u>Clone</u> ) <b>x</b> remove<br><u>a</u> y: Daily, Lead time 3 hrs, Overdue after 5 hrs<br><u>hedule</u> : NO |
| inter a new tag  |
| Compliance: YES  |
| ds:  |

6. Select "Finish" when you are finished

| Affects Compliance: YES Data Fields: |               |
|--------------------------------------|---------------|
|                                      |               |
| Inspection Results                   | Defined Value |
|                                      |               |

## **Delete a Logged Task**

How to delete a result for a logged task. This may only be done by an Administrator

Steps to Delete a Logged Task:

1. Go to the Instruments Page from the Menu



2. Select the Instrument



3. Select the Task you would like to delete a record from

| Sort By | Status            | Default | Frequency | A-Z |  |
|---------|-------------------|---------|-----------|-----|--|
|         |                   |         |           |     |  |
|         |                   |         |           |     |  |
| Tasks   |                   |         |           |     |  |
| Idaka   |                   |         |           |     |  |
| 1 🕑 🛙   | ecord CO2 Level   | I       |           |     |  |
|         |                   |         |           |     |  |
| 2 🕑 🖡   | Record Temperati  | ure     |           |     |  |
|         |                   |         |           |     |  |
| 3 🕑 (   | Corrective Action |         |           |     |  |
|         |                   |         |           |     |  |
| O4h + + |                   |         |           |     |  |
| Other   |                   |         |           |     |  |
|         | Luctom Tack       |         |           |     |  |

| Record CO2 Level                                       |            |
|--|------------|
| Fixed schedule : 24 Hours, Start Time 00:00            |            |
| Due Now  | Overdu     |
| Last Performed: May 03, 2023 12:00 EDT (View Details)  | Overdue af |
|  |            |
| CO2 Level % (acceptable: Between 4 and 6) (View Chart) |            |

5. Select the drop down button to show the logged details

|                        |             | ×          | S | can Barcode 🛄   | ] ≡  |
|------------------------|-------------|------------|---|-----------------|------|
| May 03, 2023 12:00 EDT |             | $\bigcirc$ |   |                 |      |
|                        | Add Comment | Cancel     |   |                 |      |
|                        |             |            | + | Add Service Rep | port |
|                        |             |            |   |                 |      |

#### 6. Select the Trash image

|  | ×                  | Scan Barcode 🛄       |
|--|--------------------|----------------------|
| 5 <b>7)</b>   May 03, 2023 12:00 EDT                   | Hide Details       |                      |
| May 03, 2023 12:00 EDT<br>: 24 Hours, Start Time 00:00 |                    |                      |
|  | Add Comment Cancel | + Add Service Report |
|  |                    |                      |

#### 7. Enter a Reason for deleting the result

| Fixed Schedu   | ?  |
|--|--|
| Status Defau   | Delete Instrument Task Log<br>Are you sure you want to Delete Log? |
| locard CO2 Louis   | Feason   |
| ed schedule : 24 Hours, Start Time 00:00                           |  |
| ue Now t Performed: May 03, 2023 12:00 EDT ( <u>View Details</u> ) | Yes Cancel Overdue after: 24 hours                                 |

#### 8. Select Yes



# Add an Instrument

Add an Instrument to an existing Instrument Type and select the Bench/Unit for the Instrument.

#### This can only be completed by an administrator.

If the instrument type you need to add to a department is already entered, continue to follow the steps below to add the instrument to your department. If you need to add the instrument type with its maintenance tasks to the system select this link, <u>Add a New Instrument Type</u>, then refer back to this page.

Steps to Add an Instrument and select a Bench/Unit

1. Select "Administration" from the menu

| DASHBOARD 🔿 TASKS                                       | ×                     |
|---|-----------------------|
| Tasks 🔟   | DASHBOARD >           |
|   | INSTRUMENTS           |
| ow All 🗢 Departments: Show All 🗢                        | L REPORTS >           |
| Search Tags: Enter a Tag                                | ADMINISTRATION >      |
|   | Logged in as:         |
| Acetone QC View Instrument ><br>View Maintenance Logs > | logout<br>software by |

| ists              | System                | Users   |             |                     |        |
|-------------------|-----------------------|---------|-------------|---------------------|--------|
| ists              |                       |         | Instruments | Departments & Units | es     |
|                   | + Add Site            |         |             |                     | ists   |
| ng Lab Last 90 Da | ays Compliance   100% | Last 90 |             |                     | ng Lab |
| te Lab Last 90 D  | ays No data           | Last 90 |             |                     | te Lab |

#### Note: All filters must be empty. Do not select the "Show All" filter.

| <u>e</u>             |                    |        |          |            |                          | ADMI             | N 🔶 INSTF   | RUMENTS  |          |         |        |
|----------------------|--------------------|--------|----------|------------|--------------------------|------------------|-------------|----------|----------|---------|--------|
|                      | Sites              |        |          | Department | ts & Units               |                  |             | Instrume | nts      |         |        |
| Instrumer<br>Search  | nt Lists<br>Search | Sites: | Show All | •          | Departments:             | Show /           | All 🖉       | Units:   | Show All |         | •      |
| (AB) Anal            | yzer               |        |          |            |                          | ПМ               | icrobiology | nts : 0  |          |         |        |
|                      |                    |        |          | (AB)       | Analyzer ( <u>Edit</u> ) | ( <u>Clone</u> ) |             |          |          |         |        |
| Last 90 D<br>Documen | ays No data        |        |          |            |                          |                  |             |          |          | (No Ins | strume |

3. Search for the Instrument Type you wish to add an Instrument.

| <u>୧</u>             |                    | ADM         | IN 🔶    | INSTRUMENT      | S    |              | Scan Barc           |
|----------------------|--------------------|-------------|---------|-----------------|------|--------------|---------------------|
| Sites                |                    | Departments | & Units | Instrum         | ents | Use          | rs                  |
| Instrument<br>Search | nt Lists<br>Search |             | Sites:  | Show All        | V    | Departments: | Show All            |
| Units:               | Show All           | *           |         |                 |      |              | + Add Instru        |
| Accu-Ch              | ek Inform II (     | 9C          |         | Instruments : 1 |      | L            | ast 90 Days No      |
| Acetone              | QC                 |             |         | Instruments : 1 |      | La           | ast 90 Days Complia |

4. On the right side of the page, across from the bolded instrument name, select "+ Add Instrument"

| how All  |   |                       |
|----------|---|-----------------------|
|          |   | + Add Instrument Type |
| 7 +-2.5) | Instruments : 1                         | Last 90 Days No data  |
|          | Incubator (37 +-2.5) (Edit) (Clone)     | + Add Instrument      |
| 1.2      | 1. Micro 1 Incubator ( Edit ) ( Clone ) | Status : Online       |
| 22       | Site: Training Lab                      | View Maintenance Logs |
|          | Department: Microbiology                | View Instrument >     |
| *1       | Bench / Unit: Microbiology              | Controls/Reagents >   |
|          | ell id: 123                             |                       |
|          | 42468375                                |                       |

5. Fill out the form with all the necessary information

| C         |              | Add New Instrument              | ×    | Scan Barco                      |
|-----------|--------------|---------------------------------|------|---------------------------------|
| Instrume  | nt Lists     | Sites:<br>Select Site           | ~    |                                 |
| Search    | incubator    | Department<br>Select Department | v A  | .11                             |
| Units:    | Show All     | Bench / Unit                    |      |                                 |
|           |              | Select Unit                     | ~    | Add Instru                      |
|           |              | Instrument Label                |      |                                 |
| Incubator | r (37 +-2.5) | Enter Instrument Label          | ) Da | ys CNO                          |
|           |              | Example: EPOC Patient Room 101  |      |                                 |
|           |              | Serial Number                   |      | <ul> <li>Add Instrur</li> </ul> |

6. When you are finished select "Save Instrument"

|                             | (optional) |         |        |          |           |       |        | tatus - Oplie              |                                    |           |
|-----------------------------|------------|---------|--------|----------|-----------|-------|--------|----------------------------|------------------------------------|-----------|
|                             | Scan B     | arcode  | W      |          |           |       |        | iew Mainter                | ne<br>nance Logs                   |           |
|                             | Status     |         |        |          |           |       |        | iew Instrum<br>ontrols/Rea | i <u>ent</u> )<br>ig <u>ents</u> ) |           |
| s                           | Online - I | No Prot | e 🔽 Fo | llow Uni | Allowed   | dule  | ř      |                            |                                    |           |
| <u>ata</u> )<br>( <u>Ω)</u> | Su         | Мо      | Ти     | We       | Th        | Fr    | Sa     |                            |                                    |           |
| :7 +-2.5) (II CO2           | ON         | ON      | ON     | ON       | ON        | ON    | ON     | ) Days 🤇                   | No data                            | $\supset$ |
| 1.5-42.5)                   |            | U.I.    | UN     | UN       | UN        | U.I.  | U.V.   | ) Days 🤇                   | No data                            | $\supset$ |
| i0+-2)                      |            |         |        | Sav      | ve Instri | ument | Cancel | ) Days 🤇                   | No data                            | -         |
| tor and Centrifuge          |            | Instru  | uments | :1       |           |       | La     | st 90 Days                 | No data                            |           |

# Add a Barcode to an Instrument

May only be completed by an administrator.

Steps to Add a Barcode to an Instrument:

- 1. Attach a barcode provided by ELL to your instrument
- 2. Select "Administration" from the menu

|        | DASHBOARD  | 🔶 TASKS           |      |  | ×             |
|--------|------------|-------------------|------|--|---------------|
| Tasks  | m          |                   |      | DASHBOARD                                  | >             |
|        |            |                   |      | INSTRUMENTS                                | >             |
| ow All | Department | s: Show All       | •    | REPORTS                                    | >             |
| Search | Tags: En   | ter a Tag         |      | ADMINISTRATION                             | >             |
|        |            |                   |      | Logged in as:<br>TAYLOR GILBERT (ID:847) ( | Training Lab) |
|        | Acetone QC | View Instrument > | Logs | software by                                | logout        |

3. Select the "Instruments" tab

| in Barcode |
|------------|
| S          |
| +          |
| ompliance  |
| No dat     |
|            |
|            |

#### 4. Select your instrument type

| Coverslipper      | Instruments : 1 | Last 90 Days 🔵 No     |
|-------------------|-----------------|-----------------------|
| Cyto Oven         | Instruments : 1 | Last 90 Days 🚺 No     |
| D Test            | Instruments : 1 | Last 90 Days No       |
| DxC 700 AU        | Instruments : 2 | Last 90 Days No       |
| DxH 800           | Instruments : 2 | Last 90 Days No       |
| DxH 900           | Instruments : 2 | Last 90 Days 🚺 No     |
| Dxl 600           | Instruments : 2 | Last 90 Days Complian |
| Embedding Console | Instruments : 1 | Last 90 Days No       |
| Eye Wash          | Instruments : 1 | Last 90 Days 🕢 No     |

5. Select your instrument

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6. Select the "Edit" button next to the instrument in your department/bench

| Dica                               | manumenta . 1               | Lasi su Days      |
|------------------------------------|-----------------------------|-------------------|
| DxC 700 AU                         | Instruments : 2             | Last 90 Days      |
| DxH 800                            | Instruments : 2             | Last 90 Days No   |
| <u> </u>                           | DxH 800 (Edit) (Clone)      | + Add Instrur     |
|                                    | 1. DXH 800-A (Edit) (Clone) | Status : Online   |
|                                    | Site: Training Lab          | View Maintenance  |
| 200                                | Department: Hematology      | View Instrument > |
| -                                  | Bench / Unit: DxH800-A      | Controls/Reagents |
|                                    | AV11213                     |                   |
| Last 90 Days                       |                             |                   |
| ( No data                          |                             | Status - Opling   |
| Documents(1)                       | 2. DXH 800-B (Edit) (Clone) | Status : Online   |
| <u>10 30 30 11 10 (11 30 (3)</u> , | Site: Training Lab          | View Maintenance  |
|                                    | Department: Hematology      | View locknoweath  |

#### 7. Scroll down to select the button that says "Scan Barcode"

| Direat       | nacionaria , r                  | Last ou Days      |
|--------------|---------------------------------|-------------------|
| DxC 700 AU   | Instruments : 2                 | Last 90 Days No   |
| DxH 800      | Instruments : 2                 | Last 90 Days No   |
| <u> </u>     | DxH 800 (Edit) (Clone)          | + Add Instrur     |
| <b>_</b>     | 1.DXH 800-A (Edit.) (Clone.)    | Status : Online   |
|              | Site: Training Lab              | View Maintenance  |
| 200          | Department: Hematology          | View Instrument • |
| 00           | Bench / Unit: DxH800-A          | Controls/Reagents |
|              | ell id: 45                      |                   |
| Last 90 Days | AV11213                         |                   |
| No data      | )                               |                   |
| 5            | 2. DXH 800-B ( Edit ) ( Clone ) | Status : Online   |
| Documents(1) | Site: Training Lab              | View Maintenance  |
|              | Department: Hematology          | View Instruments  |

- 8. Scan your barcode
- 9. Select "Save Instrument" when finished



## Add/Edit/Delete a Tag for a Maintenance Task

Tags provide an additional option for identifying or grouping tasks or instruments. Ex: 1st Shift, Thermometer Calibrations, Vendor PM, etc

This can only be completed by an Administrator

Note: These instructions are provided with the Maintenance Task already created. Please see <u>Add</u> <u>Maintenance Task</u> prior to completing this if needed.

1. Select the Administration page from the Menu

| DASHBOARD           | ➡ TASKS                                |  | ×            |
|---------------------|--|--|--------------|
| Tasks 🛅             |  | DASHBOARD                                    | >            |
|                     |  | INSTRUMENTS                                  | >            |
| ow All 🔹 Department | s; Show All 💌                          | REPORTS                                      | >            |
| Search Tags: En     | ter a Tag                              | ADMINISTRATION                               | >            |
|                     |  | Logged in as:<br>TAYLOR GILBERT (ID:847) (TI | raining Lab) |
| Acetone QC          | View Instrument  View Maintenance Loos | software by                                  | logout       |

2. Select the Instruments tab

| Sites    | Departments & Units | Instruments | Users           | System           |
|----------|---------------------|-------------|-----------------|------------------|
| Lists    |                     |             |                 | + Add S          |
| ning Lab |                     |             | Last 90 Days Co | ompliance   100% |
| Site Lab |                     |             | Last 90 Days    | No data          |

3. Select the Instrument Type

| 0 |                          | admin 🔶 instruments |  |
|---|--------------------------|---------------------|--|
|   | Microdase disc           | Instruments : 1     |  |
|   | MicroScan WalkAway       | Instruments : 1     |  |
|   | Microscope               | Instruments : 5     |  |
|   | Microscope for Fern Test | Instruments : 1     |  |
|   | Microtome                | Instruments : 2     |  |
|   | Microwave                | Instruments : 1     |  |
|   | Mini Cube                | Instruments : 1     |  |
|   | Mono                     | Instruments : 2     |  |

4. Select "Edit" beside the Instrument type name

| ADMIN 🔶 INSTRUMENTS |   |   |  |  |
|---------------------|---|---|--|--|
| Aicrodase disc      | Instruments : 1   | L |  |  |
| /icroScan WalkAway  | Instruments : 1   | L |  |  |
| 1icroscope          | Instruments : 5   | L |  |  |
| A                   |   |   |  |  |
|                     | 1. Blood Bank Microscope ( <u>Edit</u> ) ( <u>Clone</u> )<br>Site: Training Lab<br>Department: Blood Bank |   |  |  |
|                     | Bench / Unit: Blood Bank  |   |  |  |
|                     | 006106  |   |  |  |

- 5. Find the task you would like to add a tag
- 6. Enter the Tag Name in the Tags box

| 1 | Maintenance Task Name: Perform Alignment of Microscope (Edit) (Clone) |
|---|---|
|   | Eixed Schedule: YES   |
|   | Schedule Hours: 24 Hours 07:00  |
|   | Tags: Enter a new tag   |
|   | Affects Compliance: YES   |
|   |   |
| 2 | Maintenance Task Name: test (Edit) (Clone) X remove                   |
|   | Erequency: Unscheduled  |
|   | Fixed Schedule: NO  |

- 7. Press enter (failure to press enter will result in the Tag not being created)
- 8. You now have the option to add another tag if needed

| 1 | Maintenance Task Name: Perform Alignment of Microscope (Edit) (Clone)         |
|---|---|
|   | Fixed Schedule: YES   |
|   | Schedule Hours: 24 Hours 07:00  |
|   | Tags: 1st Shift × + Tag   |
|   | Affects Compliance: YES   |
|   |   |
| 2 | <u>Maintenance Task Name</u> : test ( <u>Edit</u> ) ( <u>Clone</u> ) ★ remove |
|   | Frequency: Unscheduled  |
|   | Fixed Scheduler NO  |

9. If you need to edit/delete the tag, you can click on the x beside the tag name

| 1 | Maintenance Task Name: Perform Alignment of Microscope (Edit) (Clone) |
|---|---|
|   | Fixed Schedule: YES   |
|   | Schedule Hours: 24 Hours 07:00  |
|   | Tags: 1st Shift × 2nd Shift × + Tag                                   |
|   | Affects Compliance: YES   |
|   |   |
| 2 | Maintenance Task Name: test (Edit) (Clone) <b>X</b> remove            |
|   | Frequency: Unscheduled  |
|   | Eived Sebeduler, NO   |

#### 10. Scroll to the bottom of the page and select Finish

|       | Affects Compliance: YES                             |
|-------|---|
| 2     | Maintenance Task Name: test (Edit) (Clone) X remove |
|       | Frequency: Unscheduled                              |
|       | Fixed Schedule: NO                                  |
|       | Tags: Enter a new tag                               |
|       | Affects Compliance: YES                             |
|       |   |
| Cinis | Sh Cancel   |

#### The tag can now be viewed on the user side by opening the task.

| 1       |                    |                      |              |     |  |
|---------|--------------------|----------------------|--------------|-----|--|
| Sort By | Status             | Default              | Frequency    | A-Z |  |
|         |                    |                      |              |     |  |
|         |                    |                      |              |     |  |
| Tasks   | 5                  |                      |              |     |  |
| ◙       | Perform Alignr     | nent of Microsco     | ope          |     |  |
|         |                    |                      |              |     |  |
| F       | ixed schedule :    | 24 Hours, Star       | t Time 07:00 |     |  |
|         |                    | •                    |              |     |  |
| I       | ags: 1st Shift     |                      |              |     |  |
| C       | Commonte (onti     | anal)                |              |     |  |
| C       | Continients (optio |                      |              |     |  |
|         | Maximum 5000 (     | characters allowed   |              |     |  |
|         | Enter Commen       | its                  |              |     |  |
|         |                    |                      |              |     |  |
|         |                    |                      |              |     |  |
|         | Completed By: s    | Sandy Strickland (IE | 0:664)       |     |  |

## Add/Edit/Delete a Tag for an Instrument

Tags provide an additional option for identifying or grouping tasks or instruments. Ex: 1st Shift, Thermometer Calibrations, Vendor PM, etc

#### This can only be completed by an Administrator

Note: These instructions are provided with the Instrument already created. Please see <u>Add an</u> <u>Instrument to a Bench/Unit</u> prior to completing this if needed.

1. Select the Administration page from the Menu.

| DASH       | BOARD →          | TASKS                                    |       |                | ×             |
|------------|------------------|--|-------|----------------|---------------|
| Tasks 📶    | ĺ                |  |       | DASHBOARD      | >             |
|            |                  |  |       | INSTRUMENTS    | >             |
| ow All 👻 🗸 | Departments:     | Show All                                 | ۲) (L | REPORTS        | >             |
| Search     | Tags: Enter (    | a Tag                                    |       | ADMINISTRATION | >             |
|            |                  |  |       | Logged in as:  | Training Lab) |
| Kontos Ace | tone QC ⊻i<br>Vi | ew Instrument •<br>ew Maintenance Logs • |       | software by    | logout        |

2. Select the Instruments Page.

|              | admin 🔶             | SITES       | Scar            | n Barcode 🛄   |
|--------------|---------------------|-------------|-----------------|---------------|
| Sites        | Departments & Units | Instruments | Users           | Syst          |
| Site Lists   |                     |             |                 | + Ad          |
| Fraining Lab |                     |             | Last 90 Days Co | mpliance   10 |
| Off Site Lab |                     |             | Last 90 Days 🤇  | No data       |

#### 3. Select the Instrument Type to expand the panel.

| HIV ag/ab combo               | Instruments : 1 | Last 90 Days (No      |
|-------------------------------|-----------------|-----------------------|
| I-STAT                        | Instruments : 7 | Last 90 Days 🕢 No     |
| I-STAT Supplies               | Instruments : 1 | Last 90 Days No       |
| Immucor                       | Instruments : 1 | Last 90 Days Complian |
| Incubator (37 +-2.5)          | Instruments : 1 | Last 90 Days No       |
| Incubator (37 +-2.5) (II C02) | Instruments : 1 | Last 90 Days No       |
| Incubator (41.5-42.5)         | Instruments : 1 | Last 90 Days No       |
| Incubator (60+-2)             | Instruments : 2 | Last 90 Days No       |
| Indole                        | Instruments : 1 | Last 90 Days 🛛 No     |

4. Select "Edit" beside the Instrument name you wish to add a tag.

| r orar ouppiles                         | instruments . T  |   |
|---|--|---|
| Immucor                                 | Instruments : 1  | Last 90 Days Compliance   |
| Incubator (37 +-2.5)                    | Instruments : 1  | Last 90 Days No da  |
|   | Incubator (37 +-2.5) (Edit) (Clone)  | + Add Instrumer   |
|   | 1. Micro 1 Incubator (Edit) (Clone)<br>Site: Training Lab<br>Department: Microbiology<br>Bench / Unit: Microbiology<br>ell id: 123 | Status : Online<br>View Maintenance Los<br>View Instrument •<br>Controls/Reagents • |
| Last 90 Days<br>No data<br>Documents(0) | 42468375   |   |

#### 5. Enter the Tag Name.

|                             | instrument Laber               |                  |
|-----------------------------|--------------------------------|------------------|
| Immucor                     | Micro 1 Incubator              | Days Complian    |
| Incubator (27 + 2.5)        | Example: EPOC Patient Room 101 |                  |
| modbator (37 +-2.5)         | Serial Number                  | Days ( NO        |
|                             | 42468375                       | Add Instau       |
|                             | Example: 3230-48R031           |                  |
| CONTRACT OF                 | Tags                           | tatus : Online   |
| AND A DECEMBER              | Enter a new tag                | iew Maintenance  |
|                             | Date of Purchase               | iew Instrument > |
|                             | (optional)                     | ontois/nedgents  |
| Last 90 Days                | Cost                           |                  |
|                             | Enter Instrument Cost          |                  |
| Documents(0)                |                                |                  |
|                             | Depreciation Date              |                  |
| Incubator (37 +-2 5) (II CO | (optional)                     | Dave No          |

- 6. Press enter (failure to press enter will result in the Tag not being created).
- 7. You now have the option to add another tag if needed.
- 8. If you need to edit/delete the tag, you can click on the x beside the tag name.

|                              | instrument cuber               |                     |
|------------------------------|--------------------------------|---------------------|
| Immucor                      | Micro 1 Incubator              | Days Compliance     |
| Incubator (37 +-2.5)         | Example: EPOC Patient Room 101 | ) Days (No dat      |
|                              | Serial Number                  |                     |
|                              | 42468375                       | + Add Instrumen     |
|                              | Example: 3230-48R031           |                     |
| (DISTANCE)                   | Tags                           | tatus : Online      |
| ACCURATE OF A                | Room 1 × Room 2 × + Tag        | iew Maintenance Log |
|                              | Date of Purchase               | ontrols/Reagents    |
|                              | (optional)                     |                     |
| Last 90 Days                 |                                |                     |
| (No data                     | Cost                           |                     |
|                              | Enter Instrument Cost          |                     |
| Documents(0)                 |                                |                     |
|                              | Depreciation Date              |                     |
| Incubator (37 +-2.5) (II C02 | (optional)                     | Davs No dat         |

9. Scroll to the bottom of the page and select Save Instrument.

|                  | (optional | )        |          |           |          |       |        | + Add Instrument    |
|------------------|-----------|----------|----------|-----------|----------|-------|--------|---------------------|
|                  | Scan      | Barcode  | III      | → ELI     | 13043    | 3     |        |                     |
|                  | Status    |          |          |           |          |       |        | tatus : Online      |
|                  | Online -  | No Prot  | olems, 1 | lesting / | Allowed  | l.    | •      | Y iew instrument ►  |
|                  | Logging   | Schedule | e 🗹 Fo   | llow Un   | it Scher | dule  |        | ontrois/Reagents>   |
| s<br>ata         | Su        | Мо       | Tu       | We        | Th       | Fr    | Sa     |                     |
| <u>0)</u>        | ON        | ON       | ON       | ON        | ON       | ON    | ON     |                     |
| 7 +-2.5) (II CO2 |           |          |          |           |          |       |        | Days No data        |
| 1.5-42.5)        |           |          |          | Sav       | ve Instr | ument | Cancel | Days No data        |
| 0+-2)            |           | Instr    | uments   | :2        |          |       | Ĺ      | ast 90 Davs No data |

The tag can now be viewed on the user side on the Instruments page.



## **Understanding Monthly Reports**

Monthly reports are auto-generated by the LabLogs system. They send a Notification to the first user in the Sign-off Chain. The user can then <u>Sign Off on a Monthly Report</u>. Before signing off the report each tab on the left of the report should be reviewed. Any corrective actions should be noted before signing off the report. Only the first person on the sign-off chain can add corrective actions. Report Summary

The Report Summary page includes your 3 month Compliance Scores, and your QA alerts for the month. Your total for Failures, Non-Compliant Events, Service Reports, Date Changes and Corrective Actions is displayed. Next is a breakdown of Compliance scores by each instrument. At the end of this page, you can Add Corrective Actions. This page also allows you to export the monthly report to a PDF file.

Maintenance Logs

The Maintenance Logs page shows the same breakdown as the Report Summary Page but it applies to the specific instrument displayed on the page. Select the "Next" button at the top or bottom of the page to toggle between instruments. Each Instrument should be reviewed for areas of interest. All results and comments can be viewed by clicking on the symbol or number inside each box. Compliance Reviews

The Compliance Reviews page will be where each of your Tasks that were completed by selecting "Confirm the miss". These are the events that count against your monthly compliance scores. Bench / Unit List

The Bench / Unit List page gives you a breakdown of Failures, Non-Compliant Events, Service Reports, Date Changes, and Corrective Actions per Bench / Unit.

Instrument List

The Instrument List page give you a list of each of your Instruments by Instrument Type. This list includes the Instrument's serial number (if entered) and the Bench/Unit it is listed under. Users

The Users page gives you a list of Users and the amount of Events Logged for the month. It also lists how many Loggers the user Logged. (If Open Logging is enabled on your system.) This is good data to support competency documentation.

#### Attachments

The Attachments page allows you to add files of supporting documents for the monthly report. Example: A disciplinary action for an employee was taken and you wanted to add this form or Package inserts for a new Instrument, Control or kit need to be uploaded to support the validation process.

Signatures

The Signatures page is where a user in the sign-off chain would go to sign-off the monthly report. It's also where other users can see when the report was signed.

## Add an Attachment to a Monthly Report

Use when a file of supporting documentation needs to be added to a monthly report a file attachment may be added.

This can only be completed by a user in the department sign-off chain. This can only be completed by the first person in the sign-off chain.

Steps to Attach a File to a Monthly Report:

- SKS Scan Barcode W -Compliance Signatures 2 Search: Search Tags: Enter a Tag
- 1. Go to the Signatures tab

2. Select "View Now" for the needed report

| Non-Compliance | Signatures 🛛 😰 |
|----------------|----------------|
|                |                |
|                |                |
|                | View Now       |
| sted           |                |
| cted)          | View Now       |
|                | Non-Compliance |

#### 3. Select the "Attachments" on the left side of the screen



#### 4. Select "Add File"

| -UNIS - ATTAUNMENTS   |          |
|---|----------|
| Attachments<br>(Chemistry - March 2023)<br>Site : Satellite 2 |          |
|   | Add File |
| ; Report.   |          |
|   |          |

5. Select "Add File" on the pop up window that appears

| nents      | ×  | Scan Barcode 🛄 | ≣ |
|------------|--|----------------|---|
|            | Note : Maximum size of a single document is 20MB |                |   |
| is Report. |  |                |   |
|            |  | Add File       |   |
|            | Save Cancel                                      |                |   |
|            |  |                |   |
|            |  |                |   |

- 6. Select the file from your computer
- 7. Select Save

|                     | Note : Maximum size of a single document is 20MB |        |
|---------------------|--|--------|
| tachment(s)         |  |        |
| ile Name            |  |        |
| ruker_reagents.jpeg | <b>a</b>   | 1 File |
|                     |  |        |
|                     | Save Cancel                                      |        |
|                     |  | ti.    |
|                     |  |        |
|                     |  |        |
|                     |  |        |
|                     |  |        |

# Sign-off on a Monthly Report

In order to sign the monthly reports all the compliance notifications must be reviewed. Once these are reviewed the monthly report will be automatically generated. The first person in the sign-off chain will have a notification. Once the report is signed, if there are others on the sign-off chain, the next person will receive a notification to sign the report. Once a monthly report is signed off by the last person, you will no longer be able to edit the information on this report.

### Steps to Sign-off a Monthly Report:

| Non-Compliance |   |        |          |   | signatures 2 |        |  |
|----------------|---|--------|----------|---|--------------|--------|--|
| ow All         | ~ | Units: | Show All | ~ | Search:      | Search |  |
|                |   |        |          |   |              |        |  |

1. Select the "Signatures tab"

- 2. Any reports that require a signature will be listed
- 3. Select "View Now" to review the report
| b  | Pending                                   |
|--|---|
| -Compliance that needs to be reviewed before the report can be generated |   |
|  |   |
| EDT  | 0/1 Signatures Collected<br>In your Queue |
|  |   |

- 4. You will be directed to that instrument's Report Summary
- 5. Set your toggle to include or hide empty data. Empty data is any instrument that does not have anything logged for the report. Leave this toggle off to include all instruments.

| Monthly Reports            | Filters                                 |           |
|----------------------------|---|-----------|
| Maintenance Logs           | Sites: Main Lab ~                       |           |
| Sites                      | Departments: Coagulation ~              |           |
| Departments                |   |           |
| Benches / Units            | The Empty Data Apply                    |           |
| Instruments                | <ul> <li>Showing All Reports</li> </ul> |           |
| Users                      | March 2023                              |           |
| Compliance Reviews         |   | Completed |
| Deleted History            | 1. <b>Chemistry</b> Main Lab<br>Final   | Completed |
|                            | Last Modified Jun 12, 2023 09:00 FDT    | View Now  |
| abLogs User's Manual v1.01 | Revision Date: Nov 3, 2023              |           |

6. Click Apply to save the toggle setting.

| Monthly Reports    |                                     |           |
|--------------------|-------------------------------------|-----------|
|                    | Filters                             |           |
| Maintenance Logs   | Sites: Main Lab ~                   |           |
| Sites              |                                     |           |
| Dopartments        | Departments: Coagulation            |           |
| Departments        |                                     |           |
| Benches / Units    | The Empty Data                      |           |
| Instruments        |                                     |           |
|                    | Showing All Reports                 |           |
| Users              | March 2023                          |           |
| Compliance Reviews |                                     |           |
|                    | 1. Chemistry Main Lab               | Completed |
| Deleted History    | Final                               |           |
|                    | Last Modified Jun 12 2022 00:00 EDT | View Now  |

### 7. Once you have completed your review, select "Sign Now"



8. You will be directed to the next screen with the list of people on the sign-off chain



#### 9. Select "Sign Now" under your name

10. If you have already created a Pin, proceed to step 14. If not, continue with the next Step

11. To Create a Pin click "Yes". This only has to be done once.



- 12. Click "Create Pin"
- 13. Enter a 4 digit Pin
- 14. Confirm Your Pin
- 15. Click "Create Pin"

| Cancel | Taylor Gilbert | New Pin * | •<br>• |            |  |  |
|--------|----------------|-----------|--------|------------|--|--|
|        |                | 1         | Cancel | Create Pin |  |  |
|        |                |           |        |            |  |  |
|        |                |           |        |            |  |  |

16. A window will pop up, you will enter any necessary comments

|          |   | ✓ Signature  | Monthly Report<br><b>Microbiology</b><br>March 2022              | Scan Barcode 🛄           |
|----------|---|--|--|--------------------------|
|          |   | By Signing this Report, you are confirming that you ar<br>You approve all data as presented in this report and u<br>knowledge. | e Admin User<br>Inderstand it to be accurate to the best of your |                          |
| Microbio | <b>logy</b> Sign-off Chain<br>Waiting for Approve | Admin User   |  | 0/2 Signatures Collected |
|          | Admin User<br>All Done?<br>Click below to :       | Add Comment:<br>* Maximum 5000 characters allowed<br>Approved and Verified   |  |                          |
| 2.       | Sign  |  | Cancel Sign Now  |                          |
|          | Daniel Summe     Mine for                         |  |  |                          |

### 17. Select "Sign Now" when you are finished

| allowed |                 |   |
|---------|-----------------|---|
| NA/     | Cancel Sign Now |   |
|         |                 | Q |

With the exception of the first user in the Sign-Off chain there is an option to sign the report or send the report back / return it to the previous user. Use the following steps for this:

1. Select the "Signatures tab"

| SHBOARD                                    | → TASK              | s                     |                               |                   |         | Scan Ba    | rcode 🛄 |   |
|--|---------------------|-----------------------|-------------------------------|-------------------|---------|------------|---------|---|
|  | Non-Co              | ompliance             |                               |                   |         | Signatures | 2       |   |
| Show All                                   | ~                   | Units:                | Show All                      | v                 | Search: | Search     |         |   |
|  |                     |                       |                               |                   |         |            |         | _ |
| ew Instrument •                            | _View Ma            | intenance             | Logs)                         |                   |         |            |         |   |
| <ol> <li>Any re</li> <li>Select</li> </ol> | ports th<br>"View N | at requi<br>low" to r | re a signatur<br>eview the re | e will be<br>port | listed  |            |         |   |
|  |                     |                       |                               |                   |         |            |         |   |

| b  | Pending                  |
|--|--------------------------|
| -Compliance that needs to be reviewed before the report can be generated |                          |
|  |                          |
|  | 0/1 Signatures Collected |
| EDT  | View Now                 |
|  | 9                        |

- 4. You will be directed to that instrument's Report Summary
- 5. If the report is acceptable select the "Sign Now" button under your name. (See above pic and directions)
- 6. If the report needs to be sent back to the previous user, select "Undo".



7. Add a rejection message for the Previous Signature User.

| Report Summary     | Fe   |
|--------------------|--|
| Maintenance Logs   | Rejecting this report will send it back to the Preparer (Sandy Strickland (ID:4) |
| Compliance Reviews | every one in the Sign-off Chain to re-Sign.                                      |
| Bench / Unit List  | The message below will be seen by everyone in the Sign-off C                     |
| Instrument List    | Rejection Message:<br>• Maximum 5000 characters allowed                          |
| Users              | Add a rejection message  |
| Attachments        |  |
| Signatures +       | Cancel   |
| Return to List     |  |
|                    | L Joann Wilson (ID:425)  |

8. Select the "Reject Report" button



## **Open Logging Settings**

Allow a user, while logged into the application, to edit the "Completed by" field. Enable or Disable in the System tab user of Loggers.

This can only be completed by an Administrator

## **Open Logging**

This feature is helpful in examples like Point of Care Testing. The user performing the task may not have access or use LabLogs (such as a Nurse), but QC needs to be documented for a newly opened kit. The User can then enter the Nurse's information as completing the task.

There are a few options when using open logging. Select which option works best for your facility. Disable Open Logging

This option prevents users from being able to use Open Logging.

Steps to Disable Open Logging

- 1. Navigate to Menu > Administration > System Tab
- 2. Scroll down to the bottom and deselect Enable Open Logging
- 3. Select Save

Instrument Security:

Enable Open Logging

Save

Enable Open Logging/Password Required

This option allows your facility to have open logging but *only on selected Instruments*. Using the Point of Care example above, All instruments would require a user with a password to complete the task

except on instruments that are designated for Point of Care testing. These Instruments will allow a user to enter another Name for "Completed By". Steps for Open Logging/Password Required

- 1. Navigate to Menu > Administration > System Tab
- 2. Scroll down to the bottom and select Enable Open Logging
- 3. Select Authenticated Users Only from the drop down menu
- 4. Select Save



Next you will need to select the instruments that you want to have Open Logging privileges.

- 1. Navigate to Menu > Administration > Instruments
- 2. Select the Instrument type you want to use to expand the panel
- 3. Select "Edit" beside the name of the Instrument you want to allow open logging





4. Scroll down to the bottom and under "Log Authentication" change "Authenticated Users Only" to "Open Logging (no password)"

5. Select Save Instrument

Enable Open Logging (no password):

This option allows your facility to have open logging *on ALL Instruments*. All instruments will allow a user with a password to enter another Name for "Completed By".

Steps for Open Logging/Password Required

- 1. Navigate to Menu > Administration > System Tab
- 2. Scroll down to the bottom and select Enable Open Logging
- 3. Select Open Logging (no password) from the drop down menu
- 4. Select Save

| Instrum         | ent Security:       |   |
|-----------------|---------------------|---|
| Enable Default: | Open Logging        |   |
| Open Log        | gging (no password) | ~ |

All Instruments will default to Open Logging (no password). If you would like to make an instrument "Password Required", follow these steps.

- 1. Navigate to Menu > Administration > Instruments
- 2. Select the Instrument type you want to use to expand the panel
- 3. Select "Edit" beside the name of the Instrument you want to set as Password required



4. Scroll down to the bottom and under "Log Authentication" change to "Open

Logging (no password)" to "Authenticated Users Only"

5. Select Save Instrument LabLogs User's Manual v1.01

## **Software Validation Process**

The steps involved in the Software / QA Validation Process

### **Overview**

This document outlines our current System Development Lifecycle and the Software / QA Validation Process customers can opt to perform, if you have purchased a Dedicated Hosting Environment. If you are utilizing our Shared (non-dedicated) Hosting Platform, this validation process likely does not apply to you.



### Step 1 - Testing / Development Environment Release

#### **Testing & Dev**

https://test.lablogs.co

Not publicly accessible to customers

Software Changes, Updates and Bug Fixes developed and tested internally.

After the release is completed and verified internally, a software release is packaged along with Release Notes.

### **Step 2 - Staging Environment Release**

Staging / QA Validation https://staging.lablogs.co

Access available to Clients with Dedicated Hosting Environments

• Once our internal QA team has completed testing, the release will be deployed to the Staging Environment.

### **Step 3 - Shared Hosting Environment Release (Production)**

Shared Hosting Environment

https://app.lablogs.co

Access available to Shared Hosting clients only.

LabLogs internal QA team will perform one last round of blanket/performance testing in the Staging Environment. If no issues found, we will then promote the release to the Production-level Shared Hosting Environment.

Release notes for the latest Production Shared Hosting Environment release can be found here: <u>http://help.lablogs.co/en/collections/3373635-release-notes</u>

Note: The release notes above 🤞 are published in cadence only with our Shared Hosting (non-dedicated environment) customers. This means that for Dedicated Environment Platform customers, the most recent release may not be deployed to their dedicated environment yet.

• At this stage, our Staging and Production Shared Hosting environments are in sync and the release notes are publically available.

- Dedicated Environment admin users will be notified via email that a new release is available.
   A link to the release notes and QA validation steps for features/enhancements will be provided.
- To request an admin user be added to the notification list, submit a ticket through the LabLogs support portal via email or through the ticketing system website.

Support Email: support@lablogs.atlassian.net Subject Line: Dedicated Environment Deployment - Request for Notification [Client Name]

Note: Since new release can often contain important security features, and high-priority bugs, we strongly recommend that Dedicated Environment customers stay up-to-date with the latest release and do not lapse more than one release cycle. In some instances (due to data migrations and other complex deployments) it may be necessary to upgrade a Dedicated Environment in the event that more than one release cycle has lapsed.

## **Step 4 - Dedicated Environment Release**

Dedicated Environment - Client A https://client-a.lablogs.co Access available to Client A Only

Dedicated Environment - Client B

https://client-b.lablogs.co

Access available to Client B Only

- Dedicated Environments do not receive the latest Software Release immediately.
- The client must submit an official request for Release (details below).
- QA/Validation steps will be provided in the release notes linked in the original notification.

As previously mentioned, the client is expected to use the Staging Environment with the Build Release Notes provided with each version and follow the Steps to Validate to internally verify and approve the software release.

Example for Release Notes from Version 1.50

## Release Notes - LabLogs.co - Version 1.50

Release Date Dec 8, 2021

C Written by Daniel Summers Updated over a week ago

#### ELL-946 Documents Linked to Instrument Details Page

New Feature

#### Description

Documents added in the Administration section are now displayed on the Instrument Page.

#### **Steps to Validate**

- 1. Logon as Administrator
- 2. Navigate to the Administration section from the Menu
- 3. Select Instruments
- 4. Select an Instrument Type to add a Document
- 5. On the left side under the Instrument Type image, click on Documents
- 6. Click on Add File
- 7. Select a Document to upload
- 8. (Optional) Provide a Description of the File
- 9. Click Save
- 10. On the right side of the Instruments List, select an Instrument and navigate to the Instrument Page by clicking on View Instrument
- 11. On the Instrument page, verify that the file is added by clicking on show files link to expand the list of Documents
- 12. Click the Green Arrow to download the File that was added

Validated by Electronic Lab Logs on Dec 8, 2021

#### http://help.lablogs.co/en/articles/6042939-release-notes-lablogs-co-version-1-50

Software Validation Tip:

Testing with the most current Client data is sometimes necessary.

To update the Client data in the Staging Environment, two different options are available to accommodate the software validation process:

1. Data Reset (Most Common)

Upon request, the LabLogs.co support staff can reset the Client data to clear out any outstanding / missed logs that might remain in the system and may have piled up during times of non-use for the Staging Environment. This clears all logs from the system but keeps all Instruments, Sites, Departments and Units. This process is essentially resetting the data to be just like the first-use run of the system.

This is the simplest and most common solution to validate the software release.

2. Data Clone

The LabLogs.co support staff can also clone the client data from the Dedicated Environment(s) to create a more current view of the system. This will pull over a current copy of the data just as it is with recorded logs and all corresponding data.

This can be helpful if many Instruments or Schedule changes have been made since the last validation, but is not typically necessary.

Submitting a Request:

To request a data reset or clone, submit a ticket through the LabLogs support portal via email or through the ticketing system website.

Support Email:

support@lablogs.atlassian.net

Subject Line: Data Reset [Client Name]

Support Website:

https://lablogs.atlassian.net/servicedesk/customer/portals

Validation and Approval:

Once the Client has approved the software release build, a formal request must be submitted. This must be done by submitting a ticket through the LabLogs support portal via email or through the ticketing system website.

Support Email:

support@lablogs.atlassian.net

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Revision Date: Nov 3, 2023

### Subject Line: Software Release [Client Name]

### Support Website:

https://lablogs.atlassian.net/servicedesk/customer/portals

- Please reference the Software Release Number and the Client Database.
- Requests will only be processed if the ticket is submitted by a verified Administrator User of the Client Site(s).
- Turn-around time for a Dedicated Environment Software Releases is 72 hours from time of receipt of Client Request. However, in most cases, this is done much sooner.

## LabLogs.co SSO Configuration Settings

This is a general overview of the SSO Configurations needed both for and from the Client.

## SSO (Single-Sign-On) Configuration - SAML-Based Flow

### **Overview**

LabLogs supports SAML-based single sign-on with most 3rd party identity providers. This document will go over (at a high-level) our process for configuring your 3rd party IDP to work with the Lab Logs Application.

- Users who federate for the first time will automatically be created in our system with no access.
  - An Administrator can enable access for the appropriate Sites, Departments and Units for each user.

Note: This is also required with all accounts newly created that are non-IDP

• Administrators can then elevate that user's permissions to have Administrator privileges.

The configuration process for your IDP will vary by 3rd party. Below are links to some of the more popular IDPs that your organization may be using:

https://saml-doc.okta.com/SAML\_Docs/How-to-Configure-SAML-2.0-General-Information.html

https://auth0.com/docs/authenticate/protocols/saml/saml-configuration

https://docs.pingidentity.com/bundle/solution-guides/page/xck1629907079074.html

https://docs.microsoft.com/en-us/azure/active-directory/manage-apps/add-application-portal-setupsso

### **Configurations Steps for the Client**

The following 4 steps are for YOUR organization. In general, configuring your IDP will involve updating 1 or more of these settings.

- 1. Configure a new application within your Identity Provider.
  - \* Make sure to specify the sign-on method as type SAML 2.0
- 2. Configure the Single Sign-on URL within your newly created app

https://{domainPrefixHere}.auth.us-east-1.amazoncognito.com/saml2/idpresponse

\* This URL is the pattern and not the actual URL, at the time of implementation, a LabLogs Implementation team member will provide the exact URL for your setup.

3. Enter audience URI (SP Entity ID).

Example: urn:amazon:cognito:sp:{userPoolId}.

\* This Entity ID is the pattern and not the actual ID, at the time of implementation, a LabLogs Implementation team member will provide the exact ID for your setup.

4. Configure your IDP to pass the following claim attributes.

| Capture | SAML attribute   | User pool attribute      |
|---------|--|--------------------------|
|         | customerHashCode   | custom:customerHash ~    |
|         | providerUserId   | custom:federatedUserId ~ |
|         | http://schemas.xmlsoap.org/ws/2005/05/identity/claims/firstName    | Given Name ~             |
|         | http://schemas.xmlsoap.org/ws/2005/05/identity/claims/lastName     | Family Name ~            |
| ✓       | http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress | Email ~                  |

#### Add SAML attribute

Claim Attribute Descriptions:

• CustomerHashCode [Custom per install] This will be provided during the implementation phase.

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- providerUserId The unique identifier for the incoming user. This field can be a string, integer, or guid it must however be unique. for the user.
- firstName The user's first name.
- lastName The user's last name.
- emailAddress The email address associated with the user.

## Configuration Steps for the LabLogs team

The following information is what we need FROM YOU in order to configure your Organization.

- SAML Signing Certificate
- Desired IDP Sign-In URL for the client application you just configured.
- Desired IDP Sign-Out URL that the Lab Logs application should call when the user times out, or attempts to click the 'logout' button.

If you have any questions, please feel free to reach out to: Electronic Lab Logs, Inc Security Team security@lablogs.co

## **Implementation Statement of Work**

A description of the Implementation process of LabLogs.co

Electronic Lab Logs Implementation Services Team Statement of Work

Project Background and Description

To ensure a smooth transition to the Lab Logs Application, we offer up to 4 months of implementation services for each of your sites. With continued weekly communication this process takes approximately 90 days, per site implementation. (Larger sites may take longer.) We recommend scheduling an implementation project for each site you have. However, you can opt to implement all sites together in parallel, should you choose to do so. Custom pricing will apply for parallel site implementations.

The Lab Logs Sales team will arrange a kickoff call between the client and Lab Logs' Implementation Team. This team will consist of one or more Customer Success Representatives and Data Entry Specialists. The Lab Logs Customer Success Manager is available for both sides of the project. During the Kickoff call, we will review a tentative timeline for each implementation you will be undergoing.

Implementation Plan and Timeline

Below is an outline of each phase undertaken during a single-site implementation, and the typical time it takes to complete each phase, given frequent communication and collaboration with the client.

Data Collection 1 – 2 weeks: \* Client will provide Lab Logs with their previous month's completed logs and structural information such as an address, departments, instruments, etc. The term "Instruments" should not restrict the selection of logs to import into the software. The Lab Logs team will make every effort to eliminate all paper logs. If it is determined a log may not work within the system, the client will be notified with an explanation and recommendation.

Implementation Build 2 weeks – 4 weeks: This phase's timeline is dependent upon the number of Logs, Instruments, and size of the Client's facility. The factor with the most impact on this phase's progression is Client Communication. The Lab Logs team will build the logs into the system prioritizing a lean and efficient workflow within the system for the client.

Admin Training 1 ½ hours: These training videos are for Lag Logs Admin Users. A follow-up video conference will be scheduled when all Admin Users have been trained. This session is 30 – 60 minutes.

Data Review 2 – 4 weeks: The Admin Users will log into the software and review the build. This review will verify frequencies, and workflows, assign barcodes, etc.

User Training 30 minutes: Training Video links are provided by Lab Logs. A Certificate of Completion is provided for each user.

Parallel 2 – 4 weeks: The client will perform a validation between their current paper system and the Lab Logs software.

Go-Live: The Client is transitioned from the Implementation team to the Customer Success and Support Team.

\* Logs containing PHI, complex calculations, and Levey-Jennings Chart generation will not be entered. However, file upload options are available for files already containing Levey-Jennings Charts. \*\* Please note that reduced customer participation in each of these phases may result in the implementation extending more than the agreed timeline, which could result in additional incurred costs.

Electronic Lab Logs 803 S College Rd, Suite G, 28403 (844) Lab-Logs | (844) 522-5647 <u>https://www.lablogs.co</u>

info@lablogs.co

## LabLogs.co Whitelist and Technical Requirements

| Application Name    | LabLogs.co                                       |
|---------------------|--|
| Application Type    | Cloud-Based Web Application                      |
|                     |  |
| Required Client     | None   |
| PHI Data            | None   |
| 1111 2444           |  |
| Internet Connection | Required - High Speed (10Mbps+ Recommended)      |
| Browser             | Chrome 60+, Edge 80+, FireFox 51+                |
| Recommendations     |  |
| Device              | Desktop Workstations, iOS or Android Tablets     |
| Recommendations     |  |
|                     |  |
| Application URL     | https://app.LabLogs.co                           |
| Authentication      | Default: In-App Authentication                   |
| Methods             | Optional Integration SSO via SAML, OAuth, Others |
| Whitelist Domains   | Main Web App                                     |
|                     | *.lablogs.co                                     |
|                     | wss://*.lablogs.co                               |
|                     | fonts.googleapis.com                             |
|                     | cdnjs.cloudflare.com                             |
|                     | maxcdn.bootstrapcdn.co                           |
|                     | m fonts.gstatic.com                              |
|                     | www.w3.org                                       |
|                     | cognito-idp.us-                                  |
|                     | east-1.amazonaws.com                             |
|                     | *.amazoncognito.com                              |
|                     | Intercom Support App                             |
|                     | widget.intercom.i                                |
|                     | 0  |
|                     | api-iam.intercom.i                               |
|                     | 0  |
|                     | js.intercomcdn.co                                |
|                     | m  |
|                     | intercom-sheets.c                                |
|                     | om   |
|                     | static.intercomassets.com                        |
|                     | m.io help.labloas.co                             |
|                     |  |
|                     | Google Analytics                                 |
|                     | www.googletagmanager.c                           |
|                     | om   |
|                     | www.google-analytics.co                          |
|                     | m stats.g.doubleclick.net                        |

## Whitelist Requirements for LabLogs.co

Whitelist Requirements for LabLogs.co platform

### **Whitelist Domains**

The following domains need to be whitelisted in order to access the full functionality of the LabLogs.co platform.

## Main Web App

wss://\*.lablogs.co \*.lablogs.co maxcdn.bootstrapcdn.com fonts.gstatic.com www.w3.org cognito-idp.us-east-1.amazonaws.com stats.g.doubleclick.net \*.cloudflare.com \*.amazoncognito.com Intercom Support App wss://nexus-websocket-a.intercom.io \*.intercom.io \*.intercomcdn.com \*.intercom-sheets.com \*.intercomassets.com **Google Analytics** www.googletagmanager.com \*.google-analytics.com \*.googleapis.com

## **Additional Questions**

For any questions or concerns, please contact the Security Department with the info below LabLogs IT & Security (844) 522-5647 security@lablogs.co

LabLogs User's Manual v1.01

## Electronic Lab Logs, Inc

803 S College Rd Suite G Wilmington, NC 28403

## **Infrastructure & Security Overview**

This article is intended to provide a high-level overview of the Lablogs platform infrastructure.

## **Cloud-based Solution**

Lablogs is a cloud-based web solution that requires no servers, installation or infrastructure maintenance by your IT team.

Lablogs utilizes AWS' "Infrastructure-as-a-service" offerings to achieve a scalable and secure solution. More can be read about AWS' offerings here: <u>https://aws.amazon.com/solutions/</u>.

Electronic Lab Logs Inc. does not own or maintain any on-premise servers to support our solution. By allowing AWS to provision and maintain all physical infrastructure, we can achieve a more scalable and secure solution to benefit our customers.



## Redundancy

All EC2 and RDS instances are hosted in a minimum of 2 availability zones (usually more) to ensure<br/>minimum downtime in the event of an outage. EC2 Auto Scaling Groups are configured for multiple<br/>LabLogs User's Manual v1.01Revision Date:<br/>Nov 3, 2023280

availability zones, and if one instance or zone becomes unavailable, traffic will automatically be routed to another instance.

## **RDS Aurora MySQL Database**

All production database instances are clustered and contain multiple readers in different availability zones. Nightly backups are taken, and stored across different zones. All databases have "encryption at rest" enabled, are located in a private subnet, and are not publically available.

For non-SSO implementations, passwords are hashed using an SHA256 encryption algorithm before being stored, to ensure they cannot be used maliciously.

## **Document Storage**

Lablogs utilizes S3 to store any documents you attach. More can be read on amazon s3 here <u>https://docs.aws.amazon.com/AmazonS3</u>. Public access to this bucket is disabled. Document access is controlled through our API via REST and a valid Access Token is required to add, view or remove any documents.

If a document is successfully uploaded to S3, any revisions (including delete actions) are kept for 6+ months in the event that is is removed or updated by mistake.

## SSL/TLS

Only SSL-encrypted traffic is allowed to reach the Application Load Balancer and public subnet (Only port 443 is enabled within the routing rules). A valid SSL certificate is configured (\*.lablogs.co) and being used for all web traffic that originates from the application.

## **Operating Systems**

Amazon Linux 2 64bit OS Docker image for Web and Worker EC2 instances, which are patched regularly.

## Languages and Frameworks

- Angular Web framework.
- Node 16/Express API layer.
- MySQL Database engine.

Routine patches and Vulnerability scans are conducted.

## SSO Integration is available

Lablogs supports SAML-based identity federation with most Identity Providers. When implemented, your Lab's IT department controls basic user access to the system. MFA, Password reset rules, etc. are all controlled through your Identity provider.

You can read more about the steps to configure SSO integration below: <u>http://help.lablogs.co/en/articles/6408311-lablogs-co-sso-configuration-settings</u> Please contact our <u>implementations team</u> to get started.

## Title 21 CFR Part 11 Response

LabLogs.co response to Title 21 CFR Part 11 Compliance

### Overview

This document outlines Electronic Lab Logs' response to Title 21 CFR Part 11 compliance and how different sections of the FDA's regulations are satisfied in our software platform, LabLogs.co.

## What is Title 21 CFR Part 11?

Title 21 CFR Part 11 is the section of the Code of Federal Regulations (CFR) that deals with Food and Drug Administration (FDA) guidelines on electronic records and electronic signatures in the United States. It defines the criteria under which electronic records and electronic signatures are considered trustworthy, reliable, and equivalent to paper records.

## What does it mean?

Organizations like pharmaceutical, medical supply and healthcare providers that fall under the 21 CFR Part 11 guidelines need to take extra precautions when using a software platform to disseminate information. Part 11 requires that both procedural controls (e.g. notification, training, SOPs, administration), and administrative controls are put in place by the user, in addition to the technical controls that a vendor can offer.

# What does Electronic Lab Logs do to comply with Title 21 CFR Part 11?

The Electronic Lab Logs team has the technology, software, and expertise to ensure all Clients remain in compliance with Title 21 CFR Part 11 using our LabLogs.co software platform. Our platform will allow you to continue to stay within the guidelines with no interruptions to your Quality Processes. Section

Requirement

LabLogs.co Feature

11.10 (b)

The ability to generate accurate and complete copies of records in both human readable and electronic form suitable for inspection, review, and copying by the agency. Persons should contact the agency if there are any questions regarding the ability of the agency to perform such review and copying of the electronic records. LabLogs.co presents standard and custom reports in both screen and downloadable form. Downloaded reports are available as a PDF export.

| 11.10 (d) | Limiting system access<br>to authorized individuals. | Access to all parts of the<br>application is controlled<br>by username and<br>password. Each account<br>has roles and<br>permissions that limit<br>the functions and data<br>the account can access.<br>LabLogs.co allows for<br>additional security<br>tailored for the Title 21<br>CFR Part 11<br>environment. These<br>settings will allow<br>Administrators to<br>enforce that only<br>authenticated users are<br>able to log data (no<br>anonymous Logger<br>accounts), requirements<br>for strong passwords<br>and expiring passwords.<br>This enhanced security<br>also allows for:<br>automatic account<br>locking for multiple<br>failed attempts, and;<br>recording of IP |
|-----------|--|---|
|           |  | recording of IP<br>addresses for all<br>accesses.   |
|           |  | uuuu3353.   |

Use of secure, computer-generated, time-stamped audit trails to independently record the date and time of operator entries and actions that create, modify, or delete electronic records. Record changes shall not obscure previously recorded information. Such audit trail documentation shall be retained for a period at least as long as that required for the subject electronic records and shall be available for agency review and copying.

LabLogs.co records everything to a log, including: a record of each action, when each action occurred, and who committed the action. Clients can also set up multi-factor authentication to increase the security requirements.

11.10 (f)

11.10 (e)

Use of operational system checks to enforce permitted sequencing of steps and events, as appropriate. LabLogs.co controls each procedure, for setting up, adding, and changing any Client data. Only internal users that have been trained on the process are given access to these controls. 11.10 (g)

Use of authority checks to ensure that only authorized individuals can use the system, electronically sign a record, access the operation or computer system input or output device, alter a record, or perform the operation at hand.

Users and Administrators are created only after training has been completed. When a user is created, that user has no access to any data. Administrators are required to add the access levels to each user after creation and those settings can not be modified by any user that does not have Administrator privileges. Additionally each Client has a unique and separate database so there is no way to access other data from other Client databases.

11.10 (h) (1)

Use of device (e.g., terminal) checks to determine, as appropriate, the validity of the source of data input or operational instruction. LabLogs.co will not accept connections without an authentication layer, and therefore will not accept commands or data, from unauthenticated sources, or from authenticated sources where the IP address of

a command does not match the originally authenticated access for a given session. Additionally, LabLogs.co will only communicate over HTTPS, which prevents a third party from modifying data being transmitted.

#### 11.50 (a) (1), (2), (3)

Signed electronic records shall contain information associated with the signing that clearly indicates all of the following:

(1) The printed name of the signer;

(2) The date and time when the signature was executed; and

(3) The meaning (such as review, approval, responsibility, or authorship) associated with the signature. LabLogs.co stores all electronic signatures for every report with this information along with the full name, authentication credentials used, and user ID of the signatory. 11.50 (b)

The items identified in paragraphs (a)(1), (a)(2), and (a)(3) of this section shall be subject to the same controls as for electronic records and shall be included as part of any human readable form of the electronic record (such as electronic display or printout).

The three signature items are included in all audit trail reports.

11.70 (a)

Electronic signatures and handwritten signatures executed to electronic records shall be linked to their respective electronic records to ensure that the signatures cannot be excised, copied, or otherwise transferred to falsify an electronic record by ordinary means.

Electronic signatures require password entry and are included with the records throughout the system. Once the report has been signed, the data is locked and can no longer be modified by any user.
| 11.100 (a)         | Each electronic<br>signature shall be unique<br>to one individual and<br>shall not be reused by, or<br>reassigned to, anyone<br>else. | Uniqueness of username<br>and password is<br>enforced by the system.<br>This uniqueness survives<br>even after the expiration<br>of an account. Inactive<br>accounts and their<br>records are never<br>removed from the<br>system.                                 |
|--------------------|---|--|
| 11.200 (a) (1)     | Employ at least two<br>distinct identification<br>components such as an<br>identification code and<br>password.                       | LabLogs.co employs<br>username and password<br>protection, and enforces<br>that the authenticated<br>session maintains the<br>continuity of IP address.<br>Additional multi-factor<br>authentication controls<br>can be added to enforce<br>further strengthening. |
| 11.200 (a) (1) (i) | The system requires the<br>use of all electronic<br>signature components<br>for the first signing<br>during a single                  | All authenticated session<br>are per confined to the<br>browser window. Closing<br>a window terminates the<br>session and  |

continuous period of controlled system access.

authentication is required even if the timeout has not yet occurred. Additionally, the session timeouts default to 15 minutes.

11.200 (a) (1) (i)

The system shall allow all subsequent signing during the same continuous period of controlled system access to use at least one electronic signature component. The system will continue to use the originating IP of each request after the first to maintain security of the session.

11.200 (a) (1) (i)

The system shall ensure users are timed out during periods of specified inactivity. When an individual executes a series of signings during a single, continuous period of controlled system access, the first signing shall be executed using all electronic signature components;

Time out in a 21 CFR Part 11 environment is enforced after 15 minutes of inactivity. subsequent signings shall be executed using at least one electronic signature component that is only executable by, and designed to be used only by, the individual.

## 11.200 (a) (1) (ii)

When an individual executes one or more signings not performed during a single, continuous period of controlled system access, each signing shall be executed using all of the electronic signature components All signing must be executed during a continuous period of controlled system access.

11.200 (a) (3)

Be administered and executed to ensure that attempted use of an individual's electronic signature by anyone other than its genuine owner requires

Sharing electronic signatures and/or authentication credentials is not permitted.

collaboration of two or more individuals.

11.300 (a)

Maintaining the uniqueness of each combined identification code and password, such that no two individuals have the same combination of identification code and password. The system will not allow duplication. Two hashes of both the username and password are kept for comparison purposes to maintain integrity without storing actual information unencrypted.

11.300 (b)

Ensuring thatThe syidentification code andto enformpassword issuances areexpirationperiodically checked,the lendrecalled, or revised (e.g.,the Clingto cover such events aspassword aging).

The system can be setup to enforce password expirations that match the length of time set by the Client internal SOPs. 11.300 (d)

Use of transaction safeguards to prevent unauthorized use of passwords and/or identification codes, and to detect and report in an immediate and urgent manner any attempts at their unauthorized use to the system security unit, and, as appropriate, to organizational management.

LabLogs.co uses intrusion detection to identify fraudulent transactions, including: multiple failed attempts at log in; log in from a large number of IP addresses, and; unusual activity in an account. The system will notify any Client of suspicious account activity. This notification, the Client's response and any necessary corrective actions are stored in Electronic Lab Logs' internal ticketing system.

11.300 (d)

Use of transaction safeguards to prevent unauthorized use of passwords and/or identification codes, and to detect and report in an immediate and urgent manner any attempts at their unauthorized use to the system security unit, and, as appropriate, to

Administrators are notified of all attempts to log in with a valid username and failed multiple logons that are flagged as suspicious. organizational management.

## **Helpful References**

FDA Regulations Database

https://www.ecfr.gov/current/title-21/chapter-I/subchapter-A/part-11?toc=1



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