LAB LOGS

User Manual

electronic lab logs

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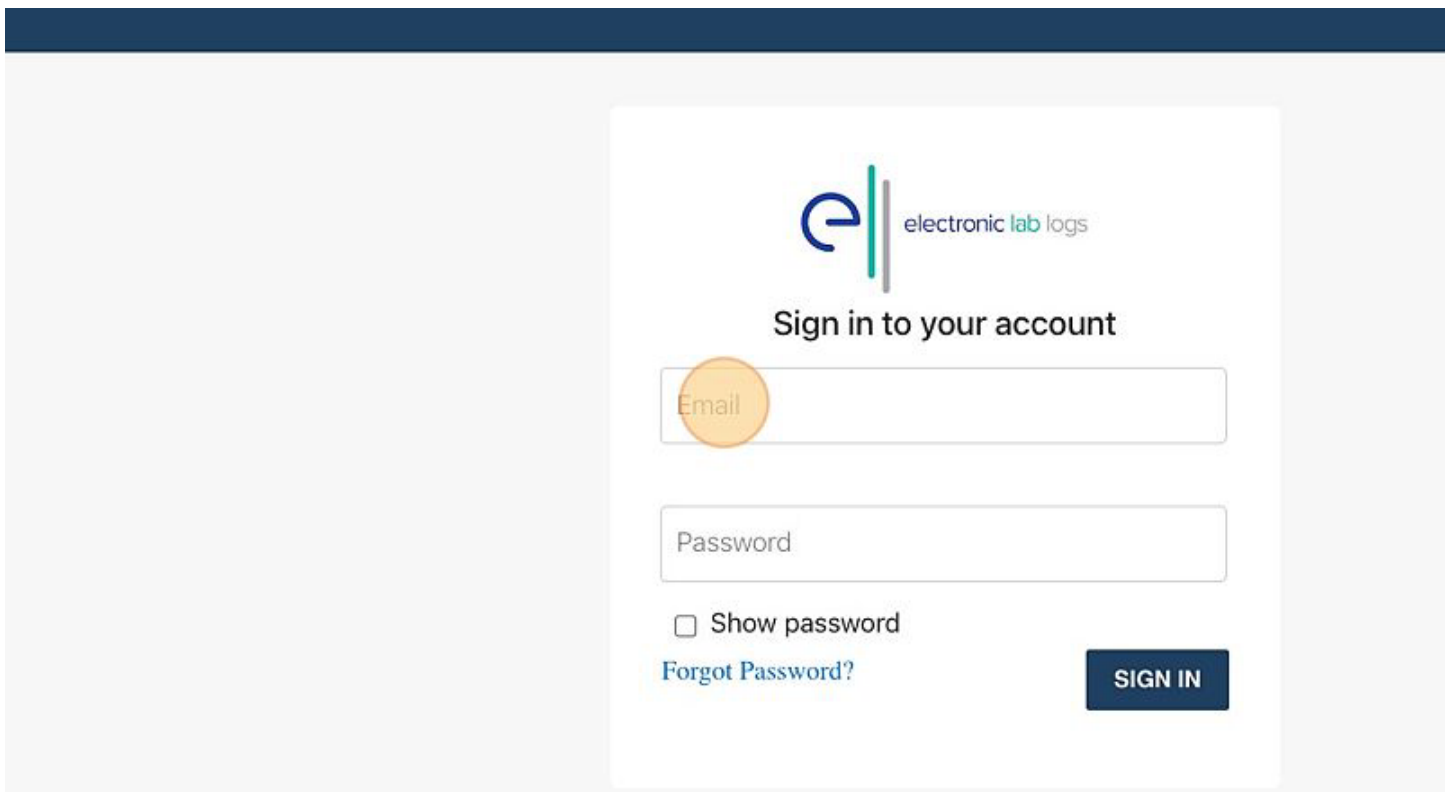
Logon and Logout

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

4. Click Sign In or press Enter.

Sign in to your account

Email
sandy@lablogs.co

Password
•••••••

☐ Show password

Forgot Password?   SIGN IN

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LabLogs.co.Software
Release 1.61 Mar 29, 2023

Steps to Logoff:

1. Select the Menu bar.

ARD ➡ TASKS   Scan Barcode ‖‖‖   ☰

                                    Non-Compliance   2281

        ▼   Units: Show All   ▼   Search: Search

View Maintenance Logs ▶

2. Select Logout just below your name.

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
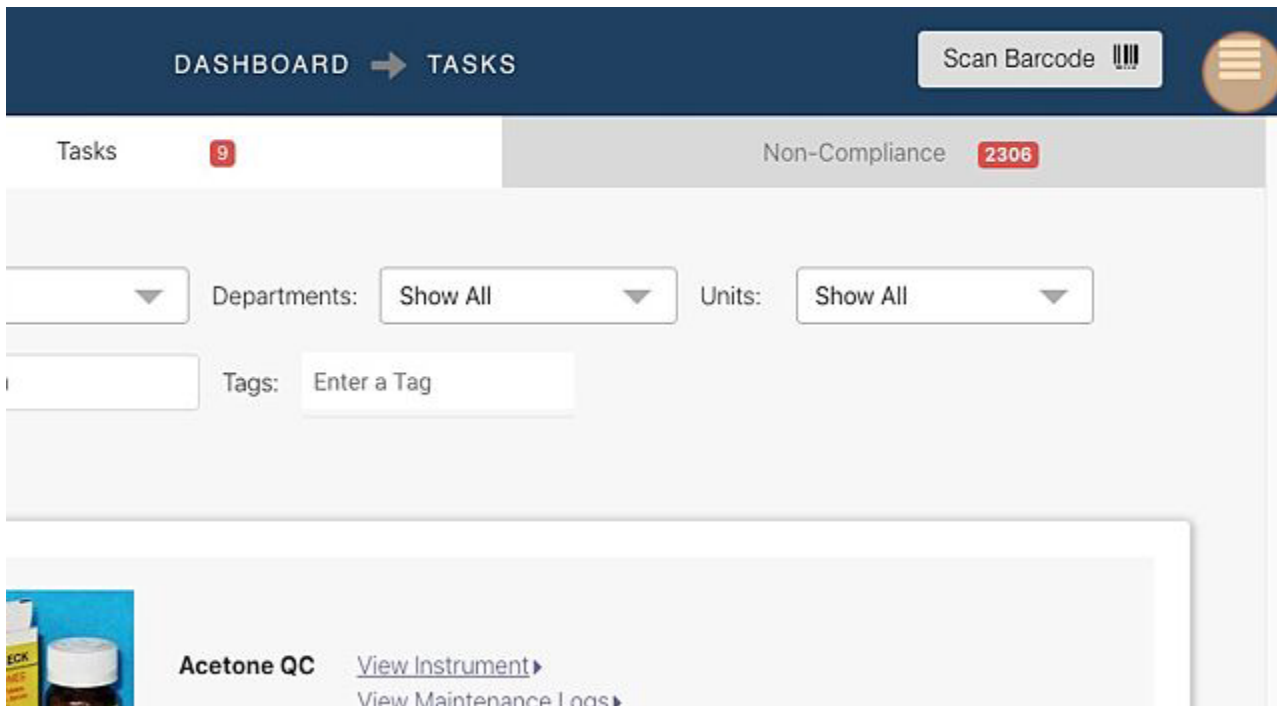
2. Select your name in the Logged in as box
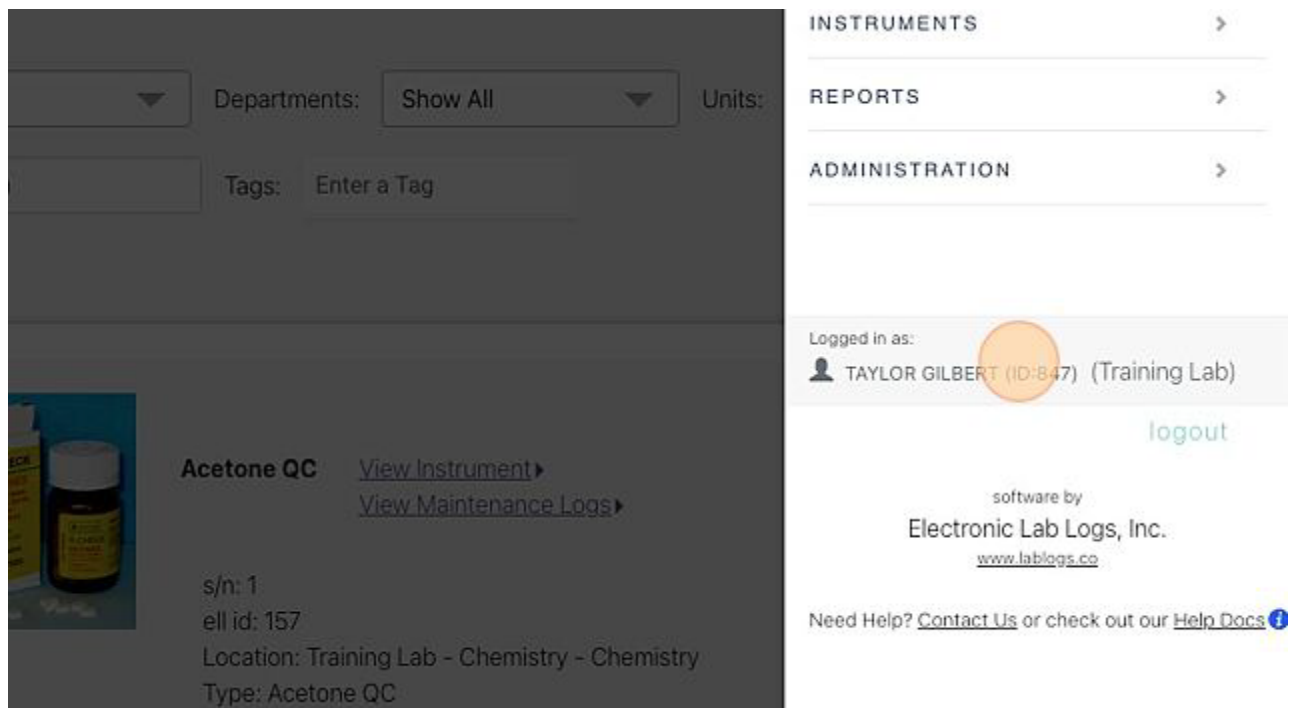
3. On the right of the page under Manage Account, select "Reset Password"
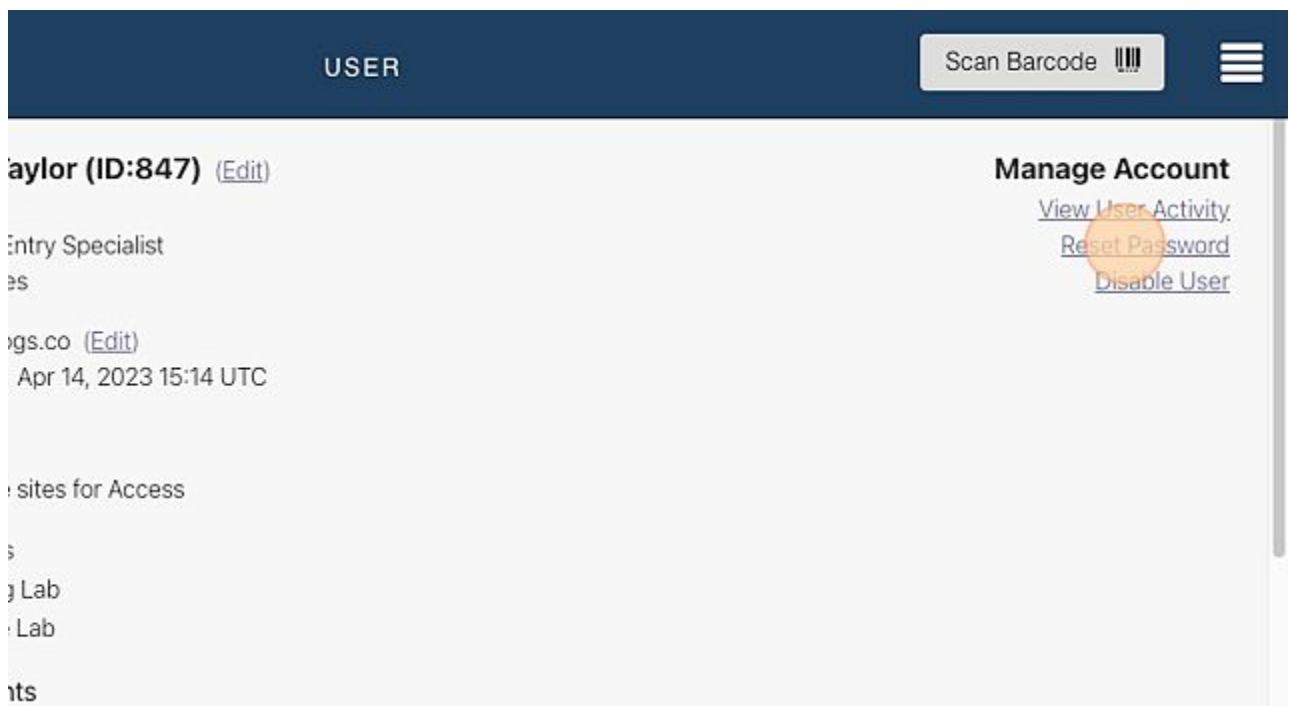
4. Enter the old password and then the new password
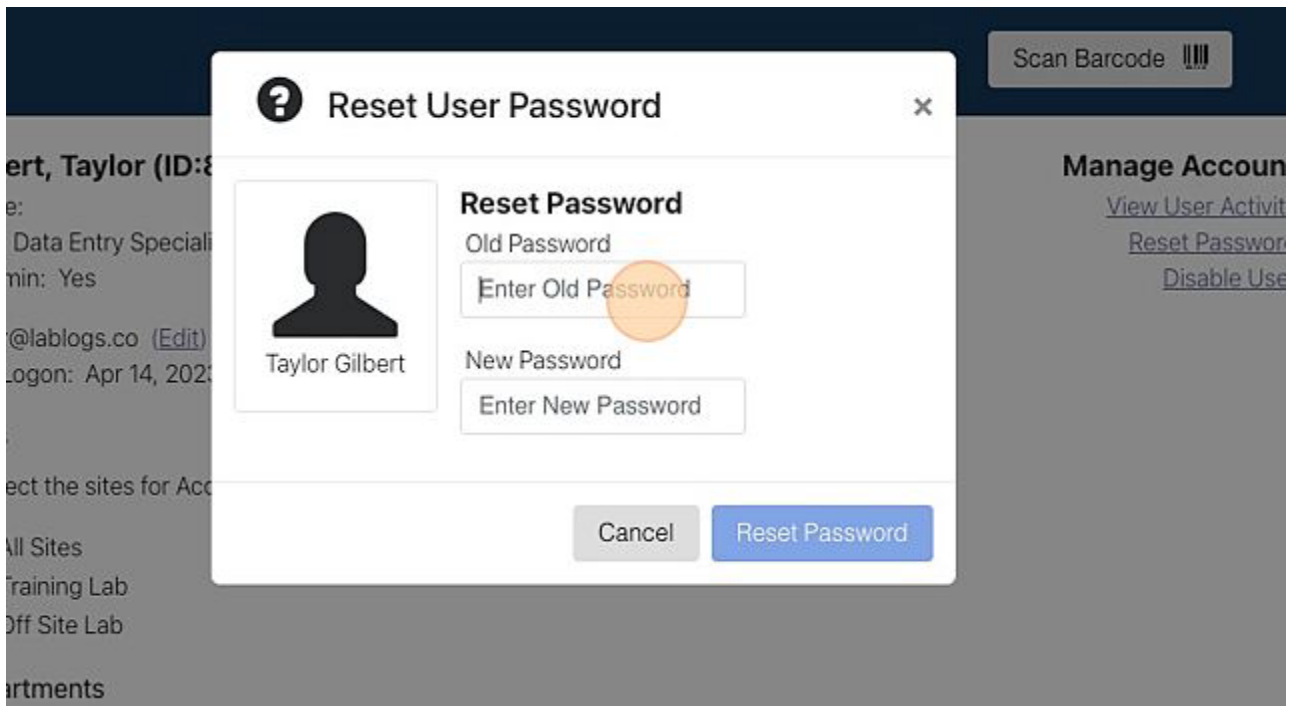
5. Select the Reset Password button
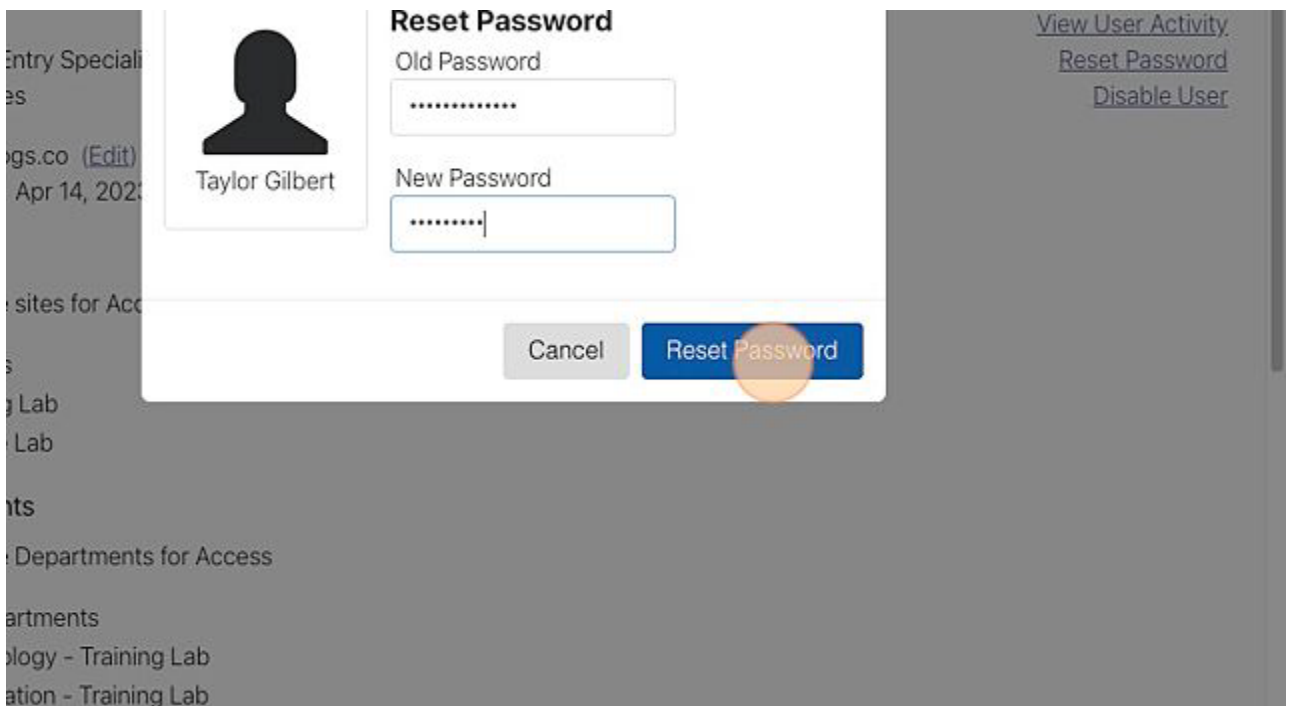
Use the following steps if the user has forgotten their password:

1. From the Login home page enter the user ID
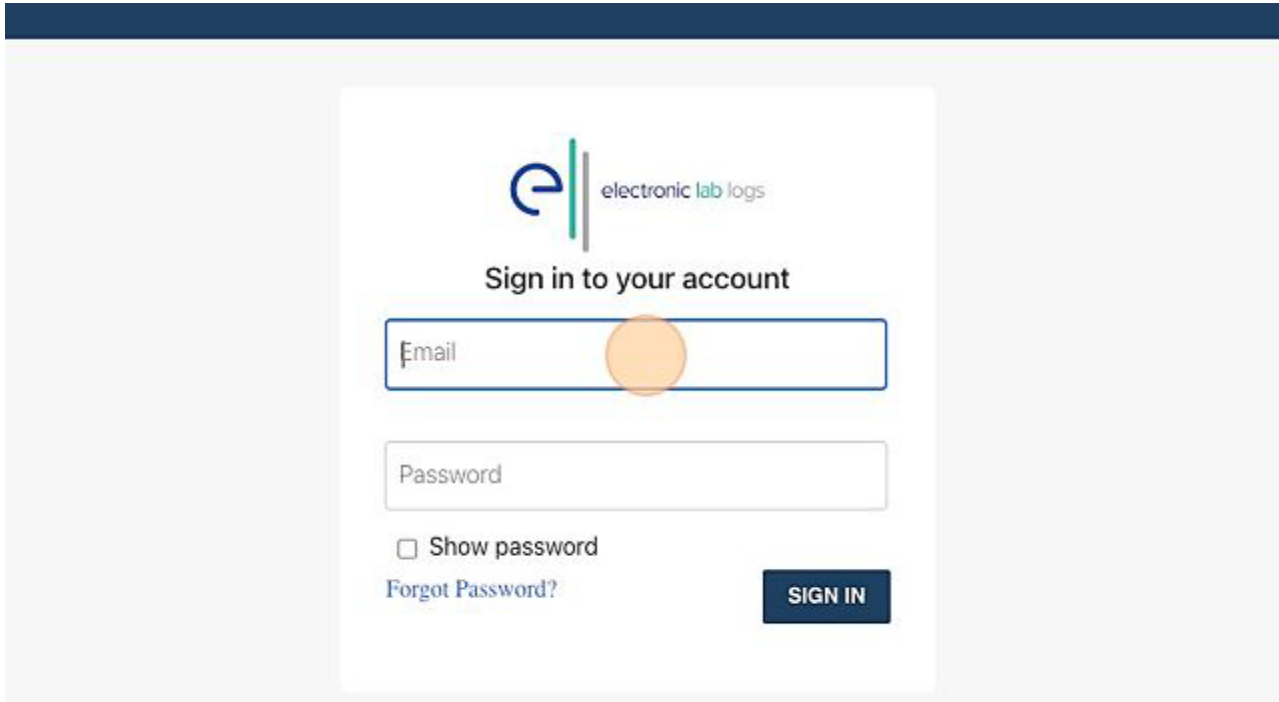
2. When prompted to enter a password, click on the Forgot Password? Button
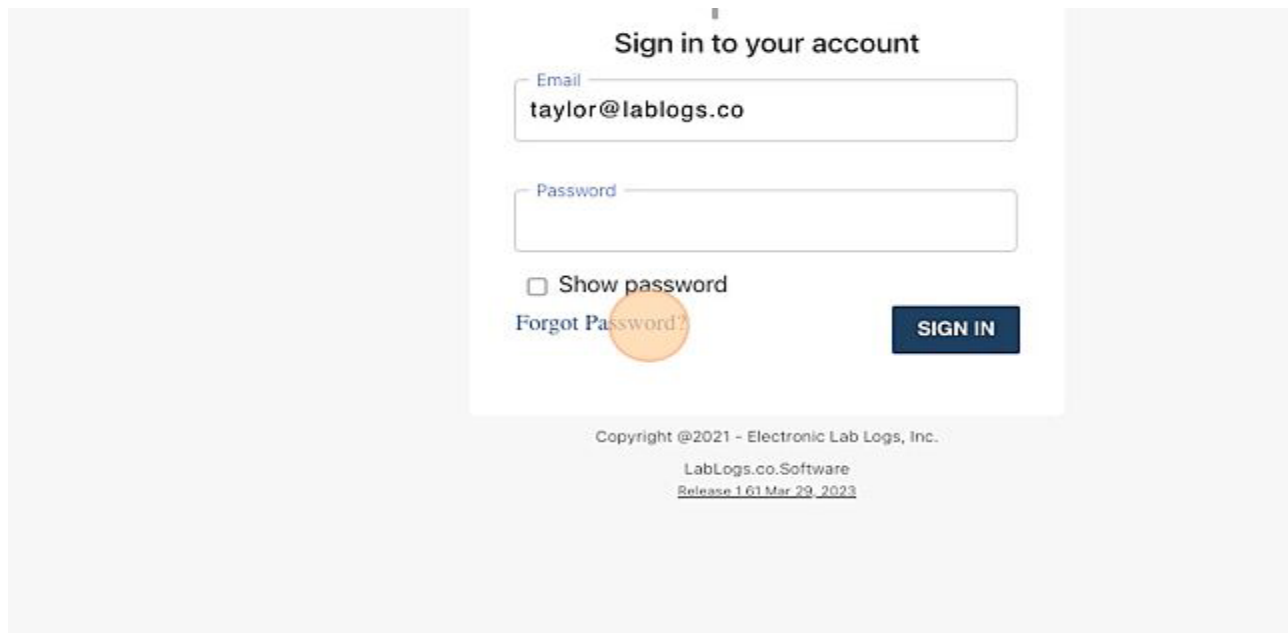
3. Click Send Code
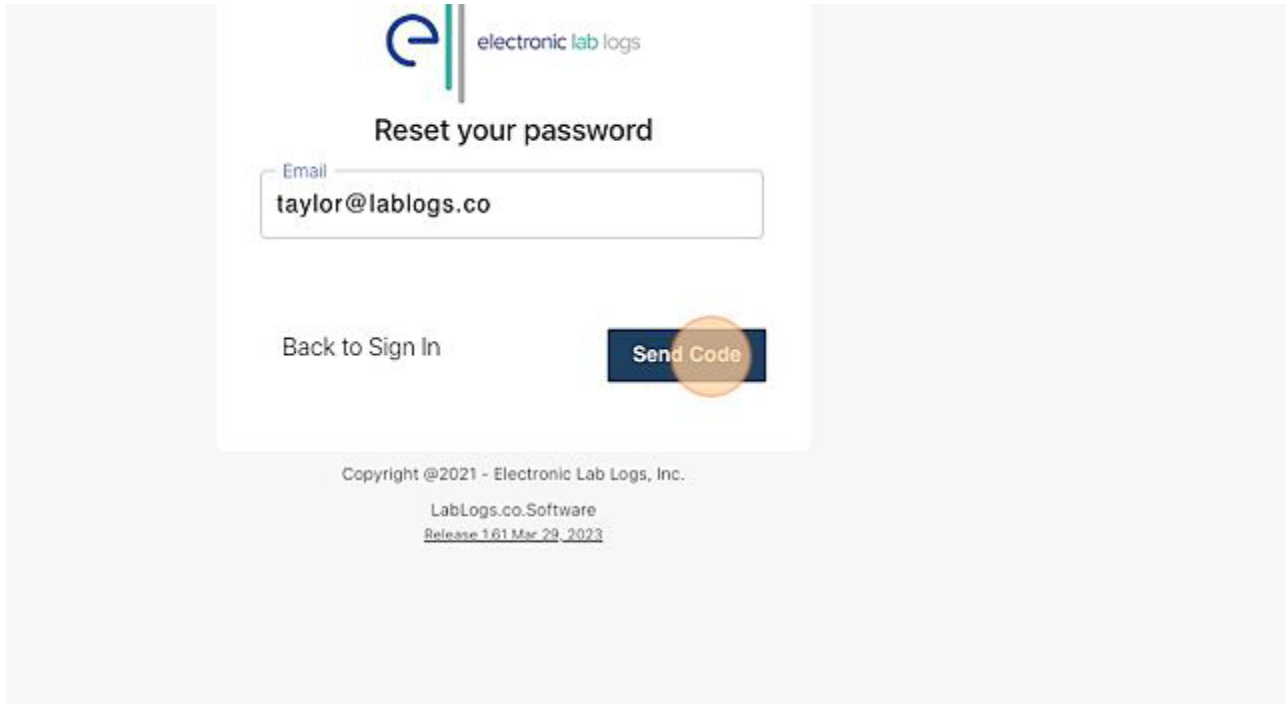
4. Check your email for the verification code

5. Enter Verification Code and New Password, then click Verify Code.
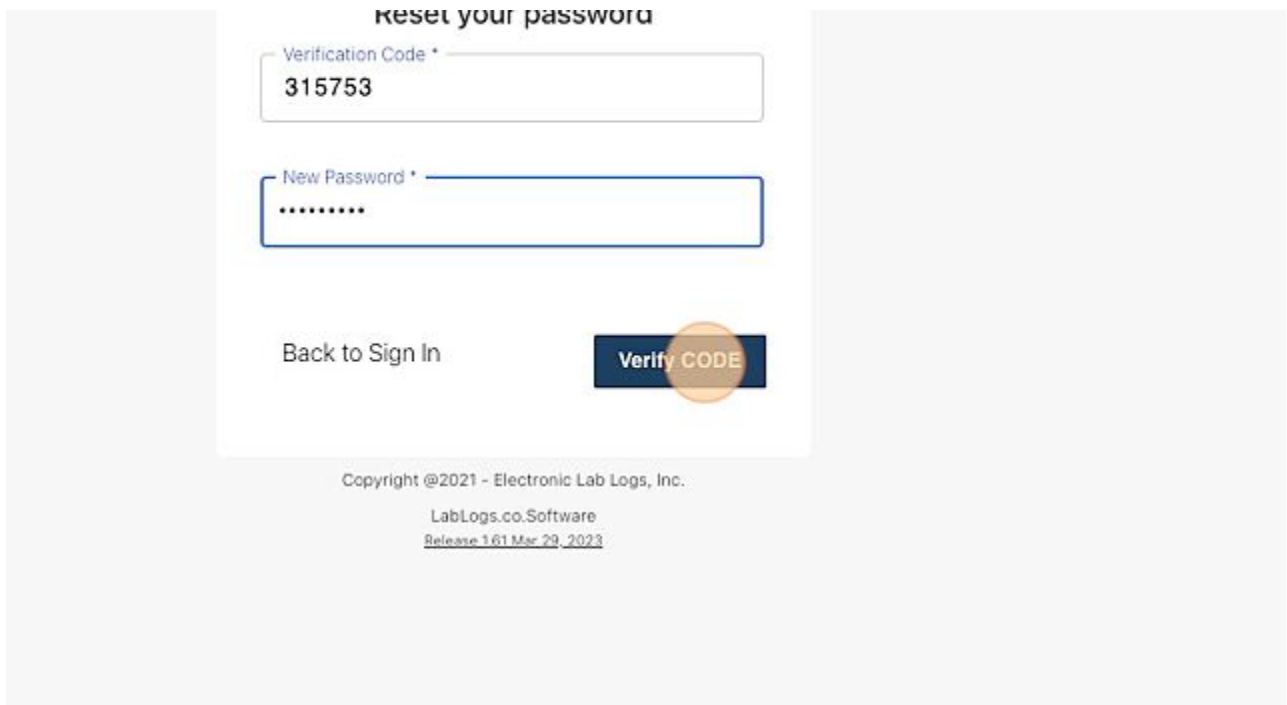
Manage Your User Account

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.

2. Select your name.

3. Make desired changes.

4. Select the Save button when complete.

Create a PIN

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

1. Select the Menu icon
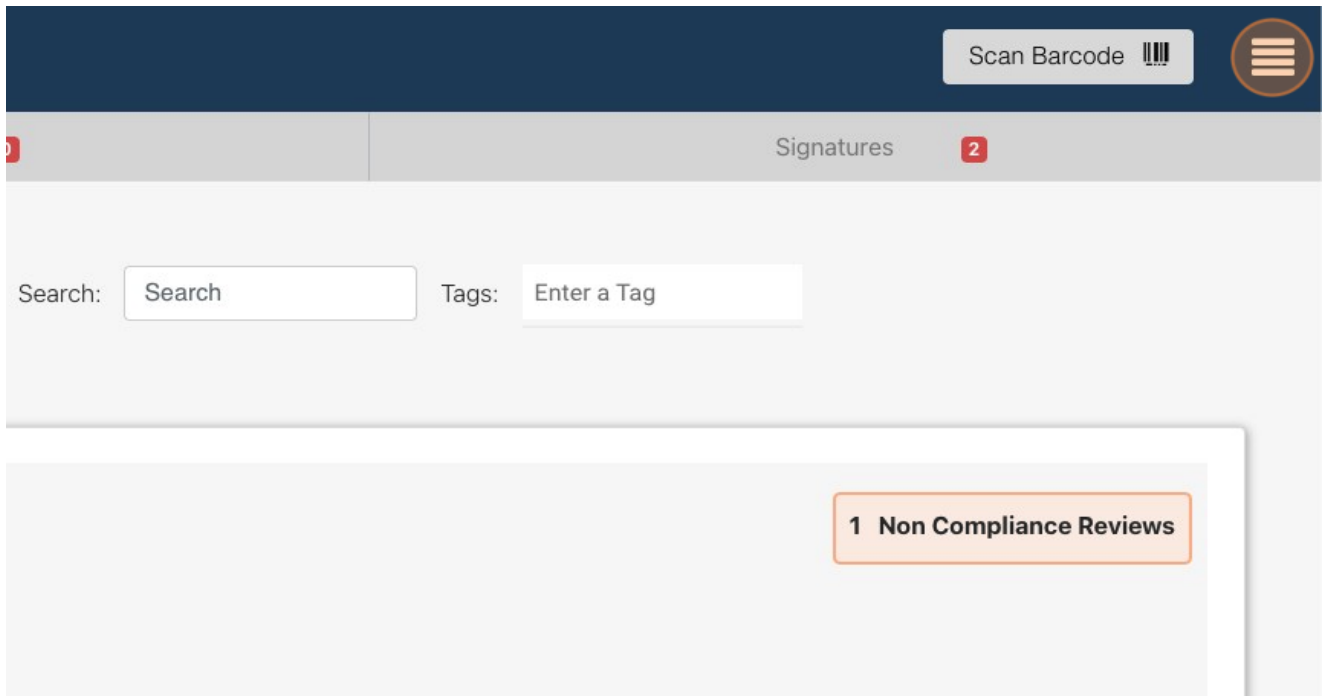
2. Click in the box that has your Name
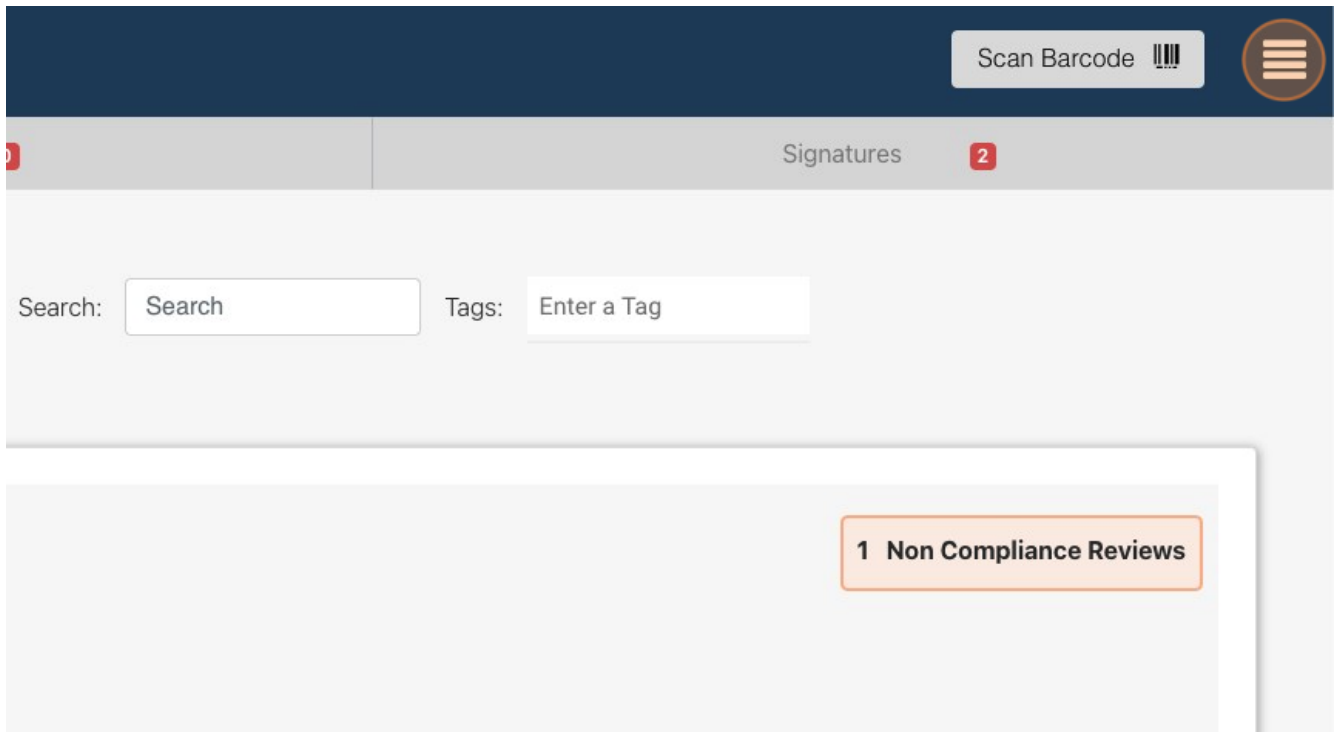
3. Select "Create Pin" in the top right corner of the screen
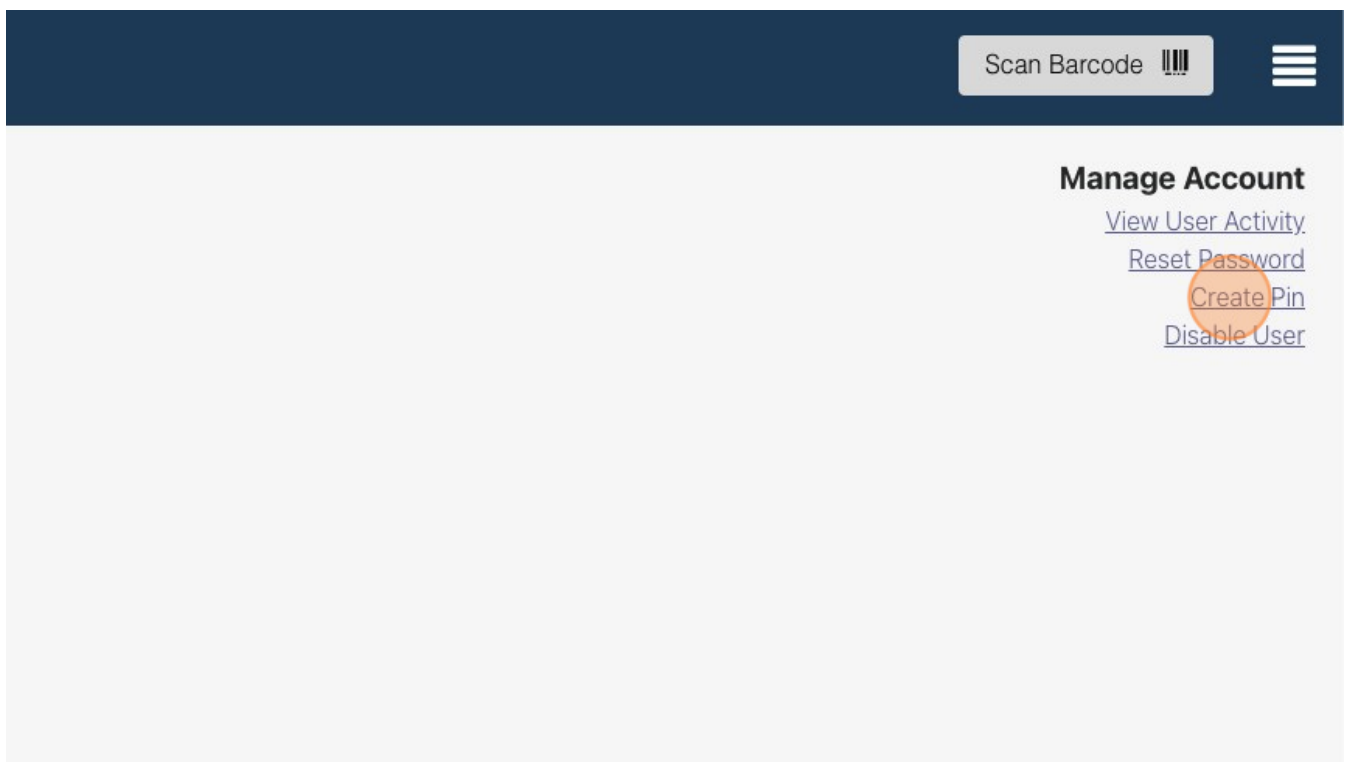
4. Enter a 4 digit Pin

5. Confirm your Pin

6. Select "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

2. Select the desired instrument

3. Select the needed task from the list

4. Fill in the necessary information

5. If the task fails, enter a required comment documenting corrective action.

6. Select "Mark as Complete" when finished

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
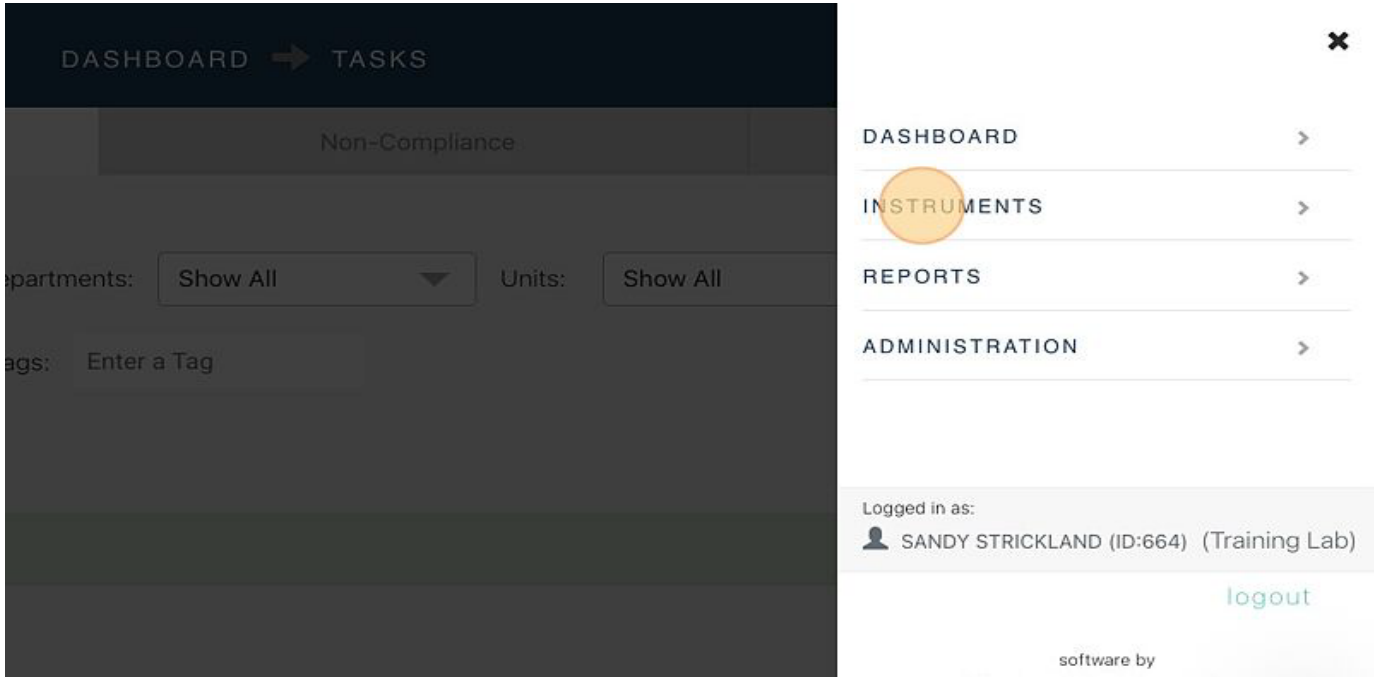
2. Select the needed instrument
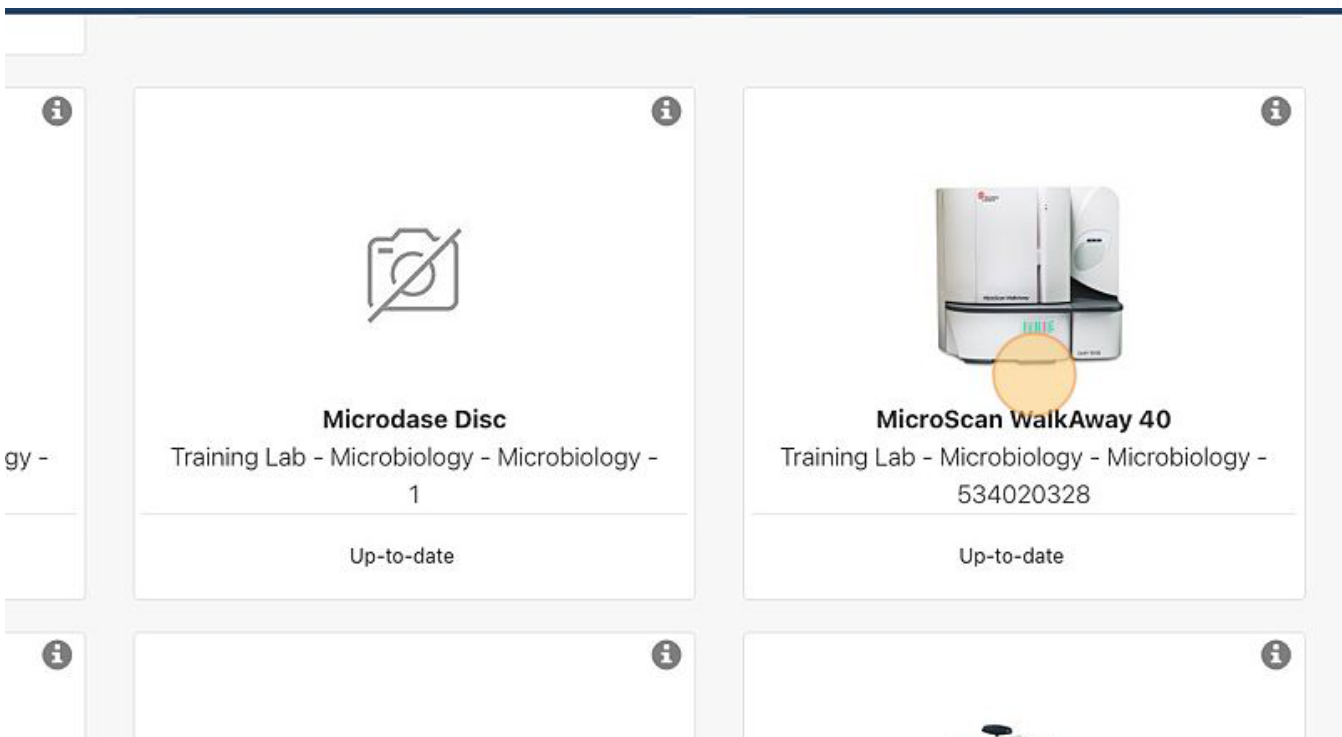
3. The page will open on the "All Tasks" tab

MicroScan WalkAway 40
s/n: 534020328
ell id: 87
Barcode : ELL130441

Location : Training Lab – Microbiology – Microbiology
Type : MicroScan WalkAway
more info ▶

All Tasks

Documents (2) show files ▶

Sort By	Status	Default	Frequency	A-Z

4. Select the unscheduled task that needs to be logged

Sort By	Status	Default	Frequency	A-Z

Tasks

1 ▶ Misc Repairs

   ▼ Replace Printer Ribbon

      Comments (optional)
      * Maximum 5000 characters allowed

      Enter Comments

2

      Completed By: Sandy Strickland (ID:664)

5. If it is not listed select "Custom Task"

Other

☑ Custom Task

Description

Enter Description

Comments (optional)
* Maximum 5000 characters allowed

Enter Comments

6. Fill in the necessary information

7. Select "Mark as Complete" when finished

"..."   ✓ Acceptable

Comments (optional)
* Maximum 5000 characters allowed

Enter Comments

Completed By: Taylor Gilbert (ID:847)

Time completed: Apr 19, 2023 10:42 EDT (Edit)

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

2. Select the Instrument you need

Scan Barcode ‖‖‖

Incubator - Campy
Training Lab – Microbiology – Microbiology –
41217056

Up-to-date

Incubator 1
Training Lab – Microbiology – Microb
123456

Up-to-date

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

Incubator - Campy
s/n: 41217056
ell id: 126
Barcode : ELL130435

Location : Training Lab – Microbiology – Microbiology
Type : Incubator (41.5-42.5)
more info ▶

All Tasks

Sort By | Status | Default | Frequency | A-Z

4. Select the task that needs to be logged

Sort By | Status | Default | Frequency | A–Z

Tasks

1 ▶ Record Temperature (°C)

2 ▶ Annual Thermometer Calibration

3 ▶ Inspect Thermometer for Damage

Other

▶ Custom Task

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

Enter Comments

1

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

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

8. Provide a reason for the back dating

Enter Comments

1

Completed By: Sandy Strickland (ID:664)

Date and Time Completed

04/28/2023   12 : 40   EDT   (Cancel)

Reason (required)
* Maximum 5000 characters allowed

Provide a reason for the modification

Mark as Complete   No Testing   Cancel

required fields above are not entered.

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

Enter Comments

1

Completed By: Sandy Strickland (ID:664)

Date and Time Completed

04/28/2023   12 : 40   EDT   (Cancel)

Reason (required)
* Maximum 5000 characters allowed

Forgot to log entry in system

Mark as Complete   No Testing   Cancel

required fields above are not entered.

View Logged Tasks

Review completed maintenance tasks.

Steps to View Tasks Completed:

1. Go to the "Instruments" from the menu
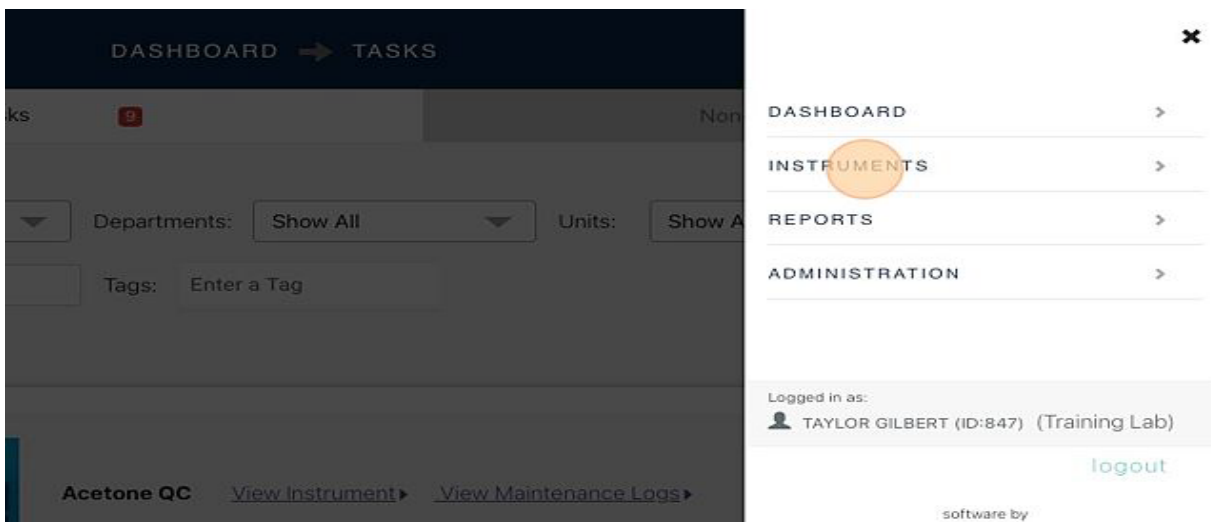
2. Select your instrument
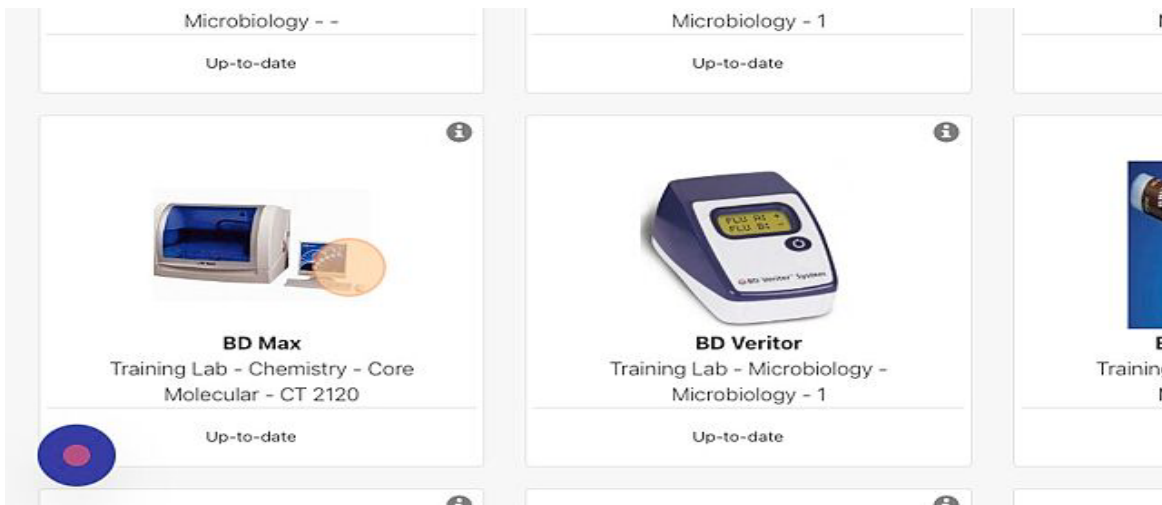
3. Select the "Reports" tab
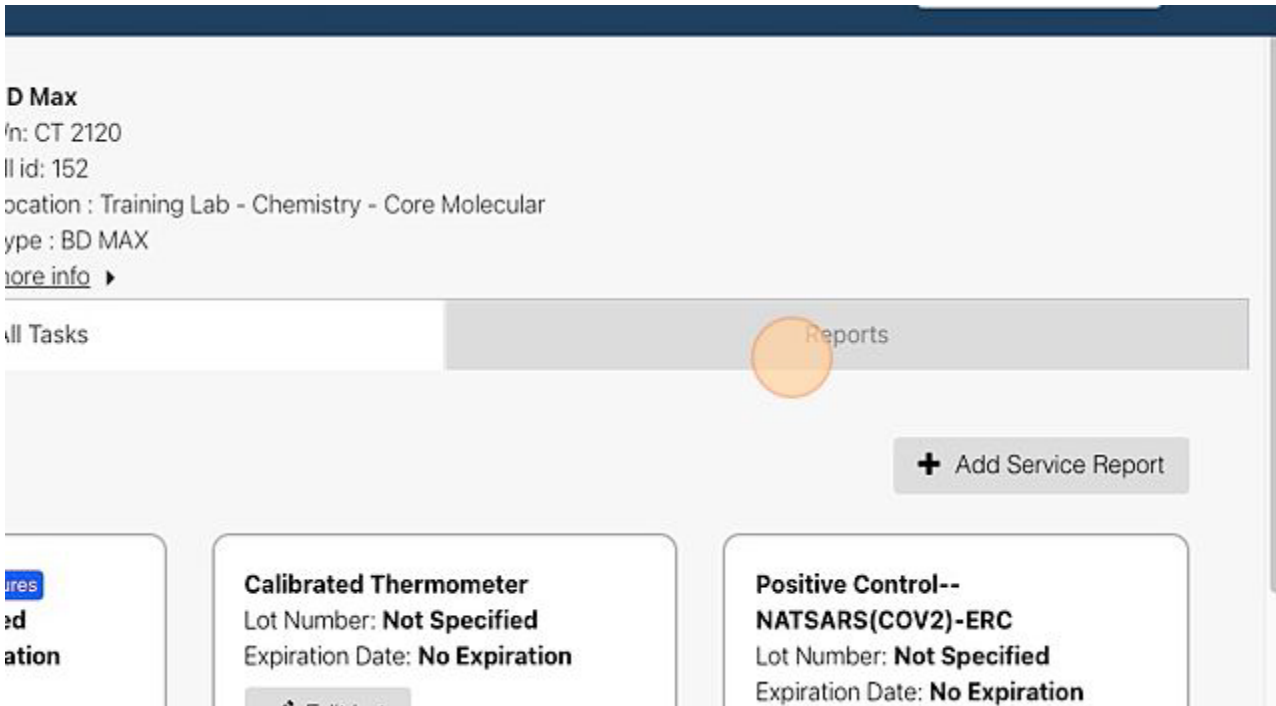
4. Use the filters to narrow down your search
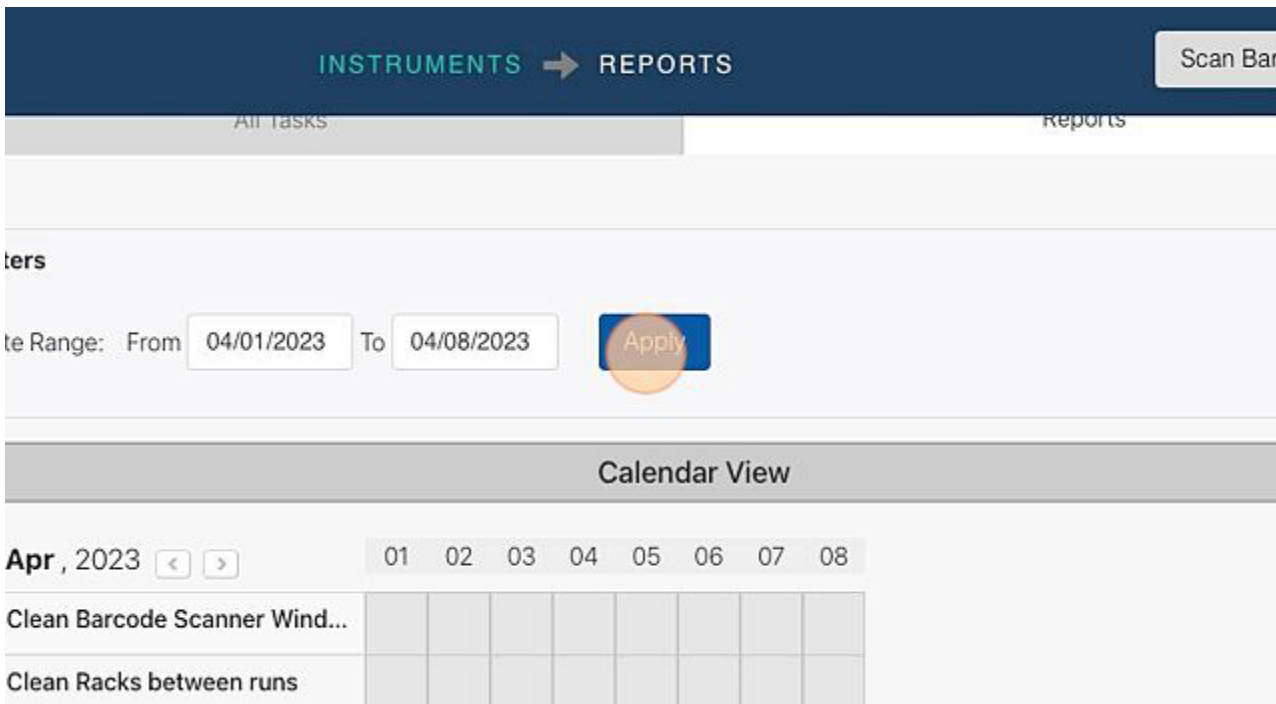
To view Maintenance Logs select this link or see View Maintenance Logs.

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	◿ NT No Testing	🗑 Ignore Ignore The Miss	⚠ Confirm Non Compliance
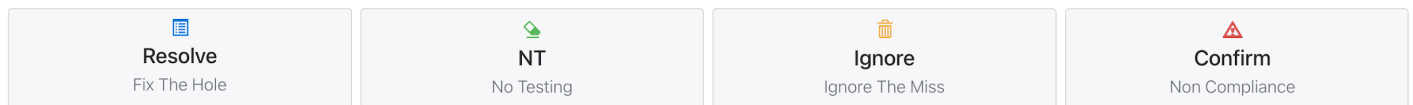
Resolve (Fix the Hole)
Selecting Resolve "fill the hole" on the Maintenance Log. You will be required to enter when the task was actually completed and why it was overdue. This is generally used when a user completed the task but forgot to log it into LabLogs. When this is selected it will show as a date modification on the Maintenance Log.

1. Select the (Resolve Fix the Hole) button
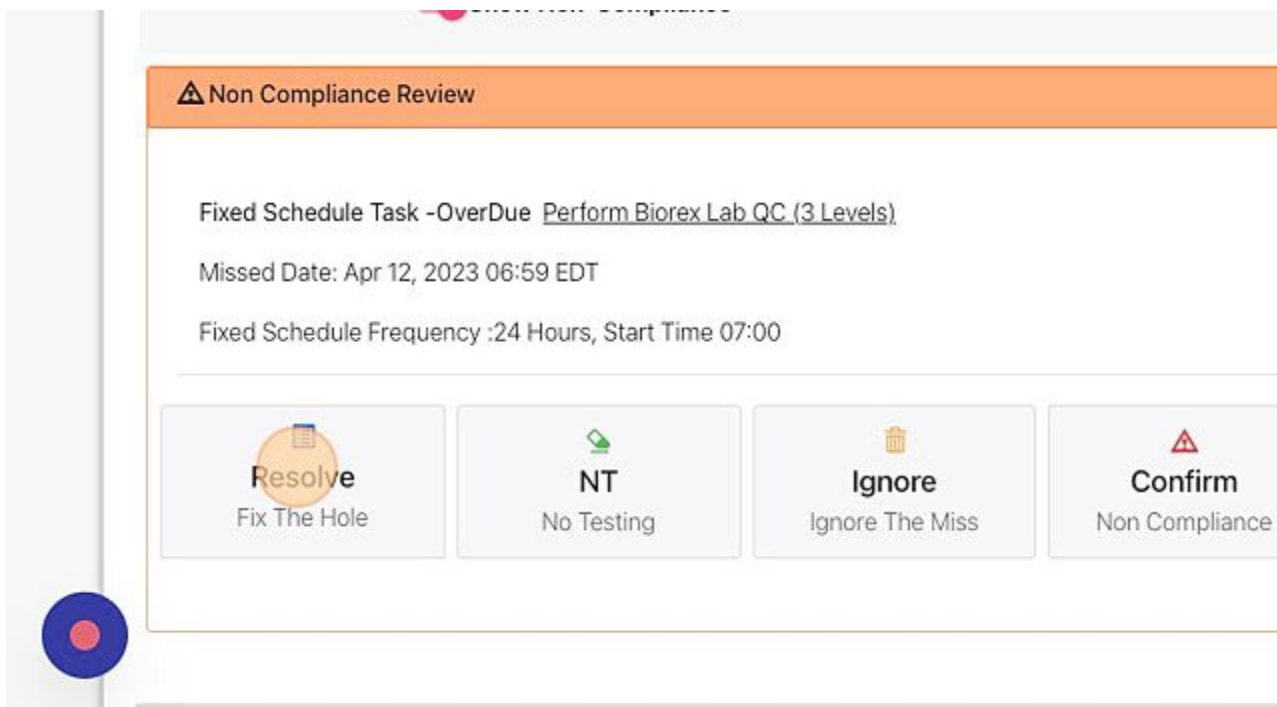
2. Enter Data

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

4. Enter required comment

Notify 2nd Tech to Review QC (acceptable: Complete)

Complete   ✓ Acceptable

Date and Time Completed   ^   ^

03/23/2023   23 : 59 EDT

    ˅   ˅

Reason (required)

* Maximum 5000 characters allowed

Provide a reason for the modification

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)

Maximum 5000 characters allowed

" "
...

Mark as Complete   Cancel

Perform Biorex Lab QC (3 Levels)   ⚠ Overdue

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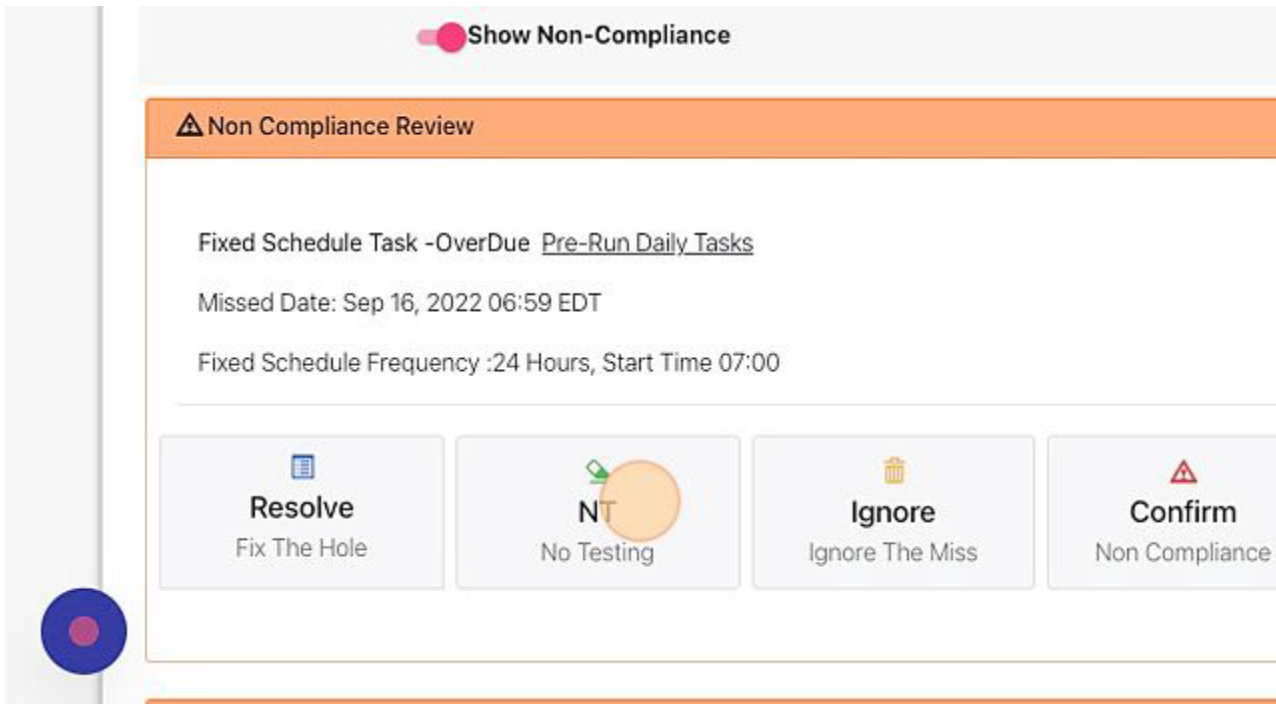
Ignore (Ignore the Miss)
An example of when this may be used is if the instrument went down for maintenance or wasn't in working order, but the status of the instrument was not changed in LabLogs. This will not count against monthly compliance percentages.

1. Select (Ignore the Miss) button

Fixed Schedule Task -OverDue Pre-Run Daily Tasks

Missed Date: Sep 18, 2022 06:59 EDT

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

📋 **Resolve** Fix The Hole	🖌 **NT** No Testing	🗑 **Ignore** Ignore The Miss	⚠ **Confirm** Non Compliance

Non Compliance Review

Fixed Schedule Task -OverDue Pre-Run Daily Tasks

2. Enter a required comment

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

Enter explanation

Mark as Override   Cancel

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

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

Resolve	NT	Ignore	Confirm
Fix The Hole	No Testing	Ignore The Miss	Non Compliance

Non Compliance Review

Fixed Schedule Task -OverDue Pre-Run Daily Tasks

2. Enter a required Comment

Warning Confirm Non Compliance

This will count against your Compliance Percentages!

This should only be submitted if the task was missing and No corrections is Possible. To Correct the Entry instead, **Cancel** and use either **Fix Log** or **NT** Functionality.

To Complete, Please Provide an Explanation(required):

* Maximum 5000 characters allowed

Enter explanation

Confirm   Cancel

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

Warning Confirm Non Compliance

This will count against your Compliance Percentages!

This should only be submitted if the task was missing and No corrections is Possible. To Correct the Entry instead, **Cancel** and use either **Fix Log** or **NT** Functionality.

To Complete, Please Provide an Explanation(required):

* Maximum 5000 characters allowed

"...

[Confirm] [Cancel]

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
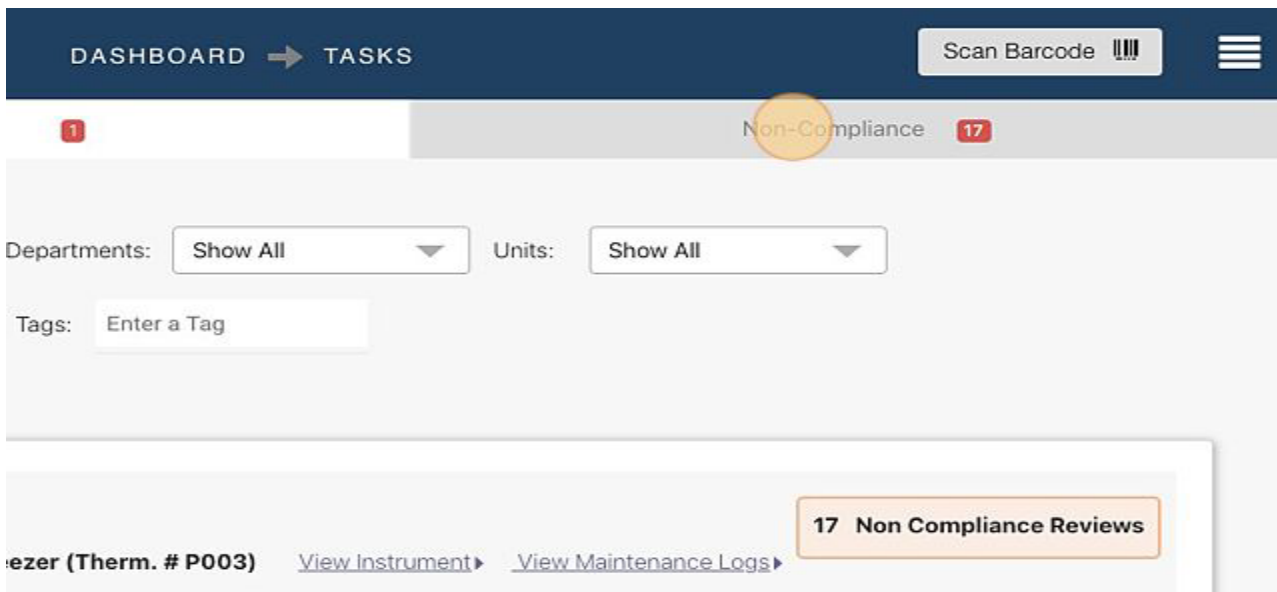
2. Select the "Select Multiple" button
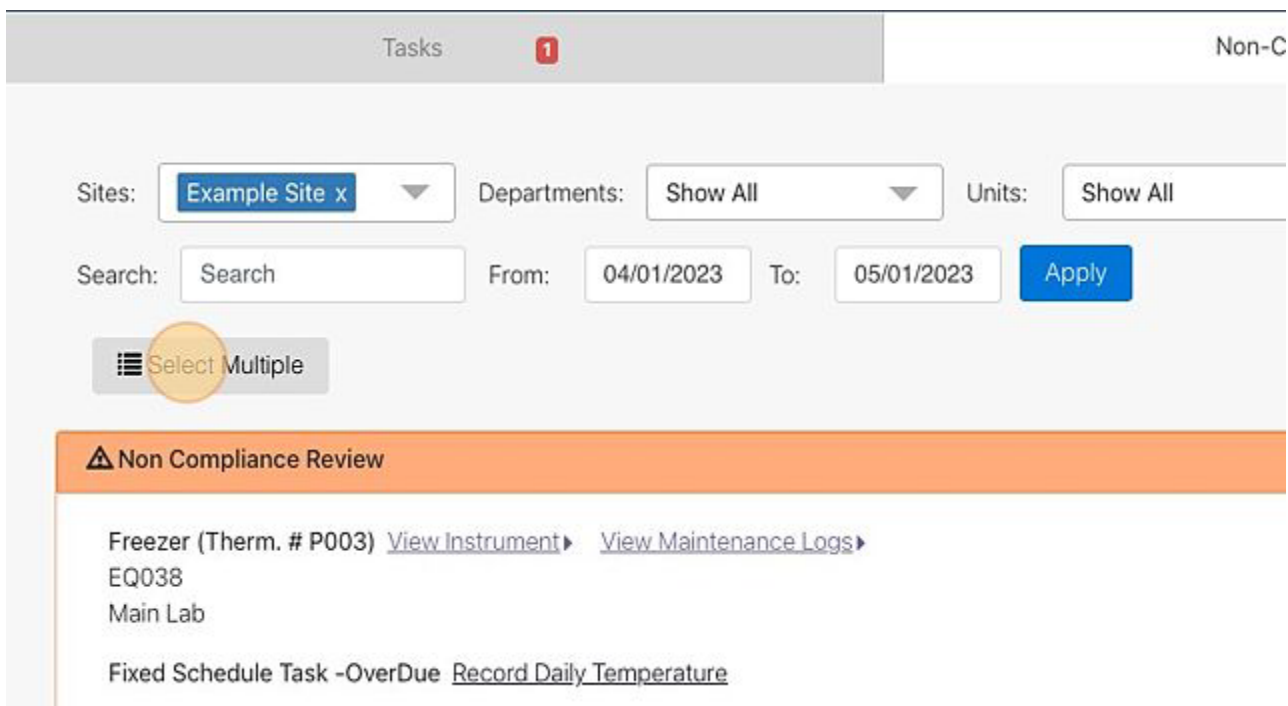
3. Select the tasks you want to complete

Override OR No Testing Confirm Non-Compliance

Warning: This action will affect all the items currently selected

Add an Explanation (optional)

⚠ Non Compliance Review

Freezer (Therm. # P003) View Instrument▸ View Maintenance Logs▸
EQ038
Main Lab

Fixed Schedule Task -OverDue Record Daily Temperature

Missed Date: Apr 20, 2023 23:59 EDT

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

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

DASHBOARD ➡ NON-COMPLIANCE

Sites: Example Site x ▼   Departments: Show All ▼   Units: Show All

Search: Search   From: 04/01/2023   To: 05/01/2023   Apply

select all

11 Selected Items

Override OR No Testing Confirm Non-Compliance

Warning: This action will affect all the items currently selected

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.

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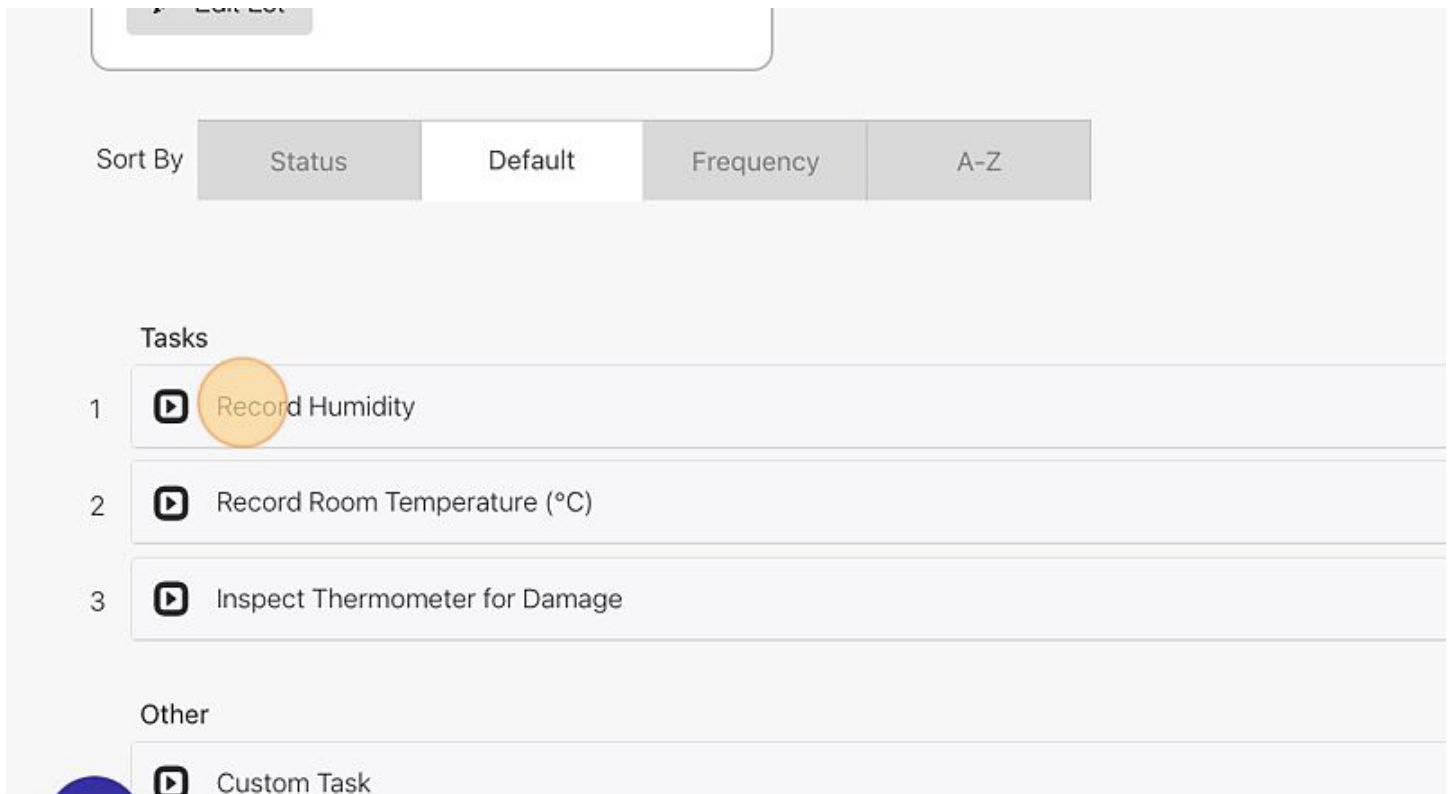
2. Enter results in the data fields (if applicable).

Tasks

Record Humidity

Frequency: Daily, Lead time 3 hrs, Overdue after 5 hrs

Record % Humidity   (acceptable: Between 10 and 85)   (View Chart)

Enter Record % Humidity

Comments (optional)
* Maximum 5000 characters allowed

Enter Comments

1

Completed By:

Sandy Strickland (ID:664)   Selected

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".

Perform QC (New Lot/Shipment)

Lots Used:
   Glucose Test Strip – 12345 – Exp Aug 31, 2022 (Change)
   Control 1 – 11111 – Exp Aug 31, 2022 (Change)
   Control 3 – 33333 – Exp Aug 31, 2022 (Change)

High   (View Chart)
   Enter High

Low   (View Chart)
   Enter Low

Comments (optional)
   * Maximum 5000 characters allowed
   Enter Comments

Completed By:

Joann WIlson (ID:425)   Selected

Billy Joe* (ID:13)   Select

Add new User

Time completed: Aug 19, 2022 13:59 EDT (Edit)

Mark as Complete   No Testing   Cancel
required fields above are not entered.

5.   Add the person's Name and Badge ID (optional).
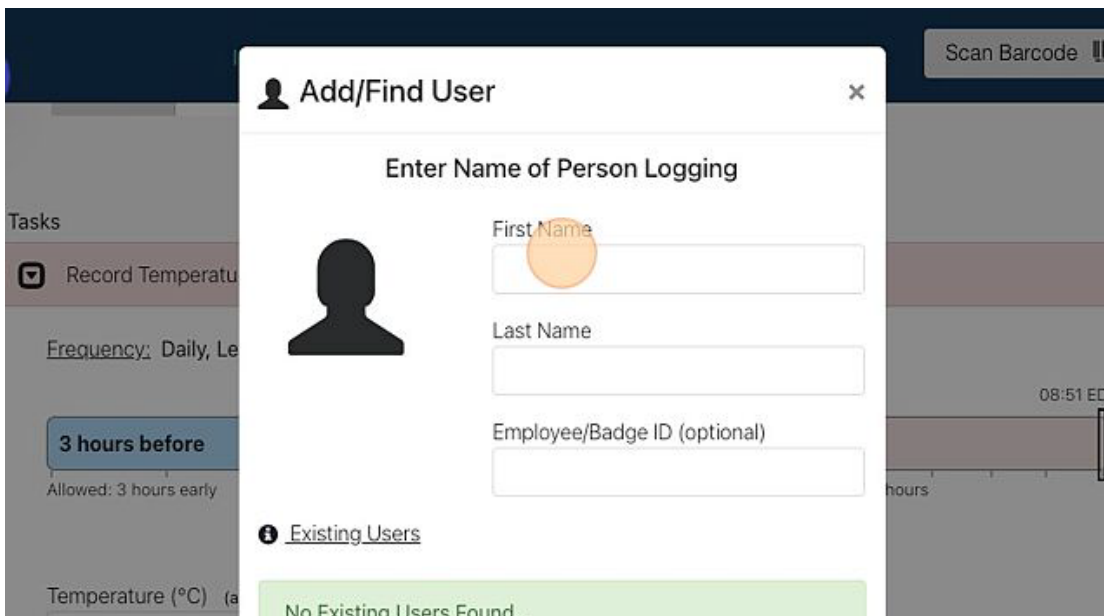
6.   Select "Add User"
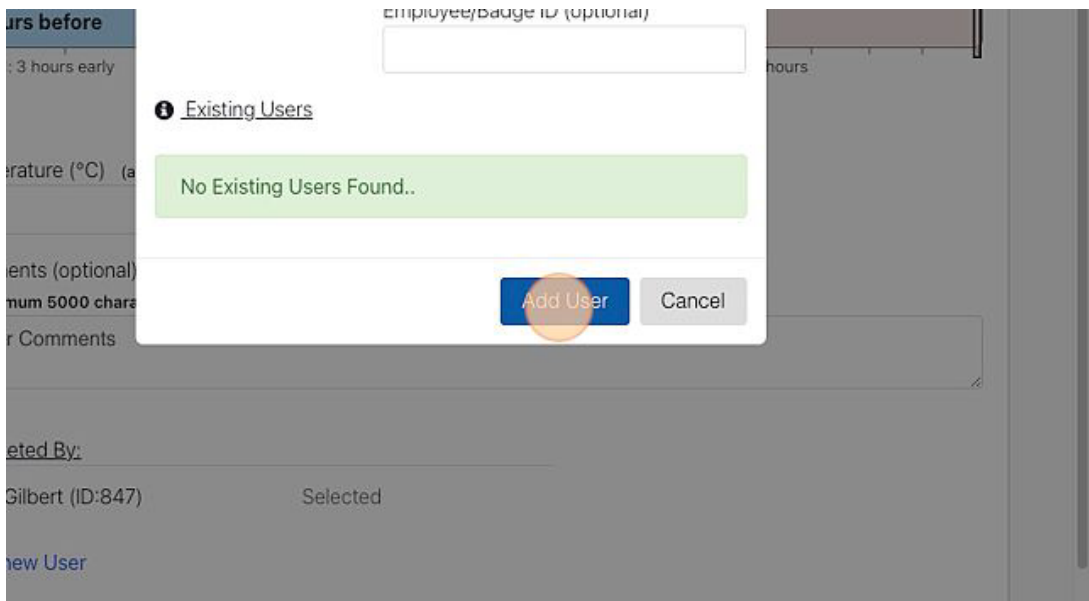
7. Select "Mark as Complete"
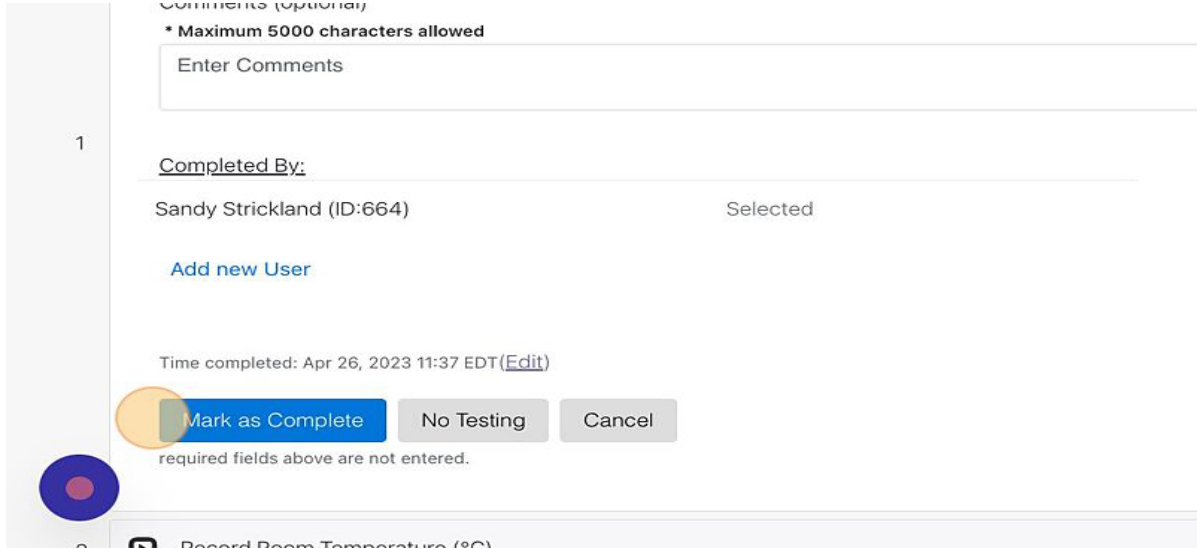
The task will record the Person's name ex: John Smith* however, it will still show who was logged in at the time the task was completed.

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

Aug 18 Aug 19,2022 Aug 20

John Smith* (ID:14) Aug 19, 2022 14:06 EDT   Hide Details ⌃
Complete ✔ | Perform QC (New Lot/Shipment)

| Complete | Aug 19, 2022 14:06 EDT | 🗑 |

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

* Logged in as : Joann Wilson (ID:425)

[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
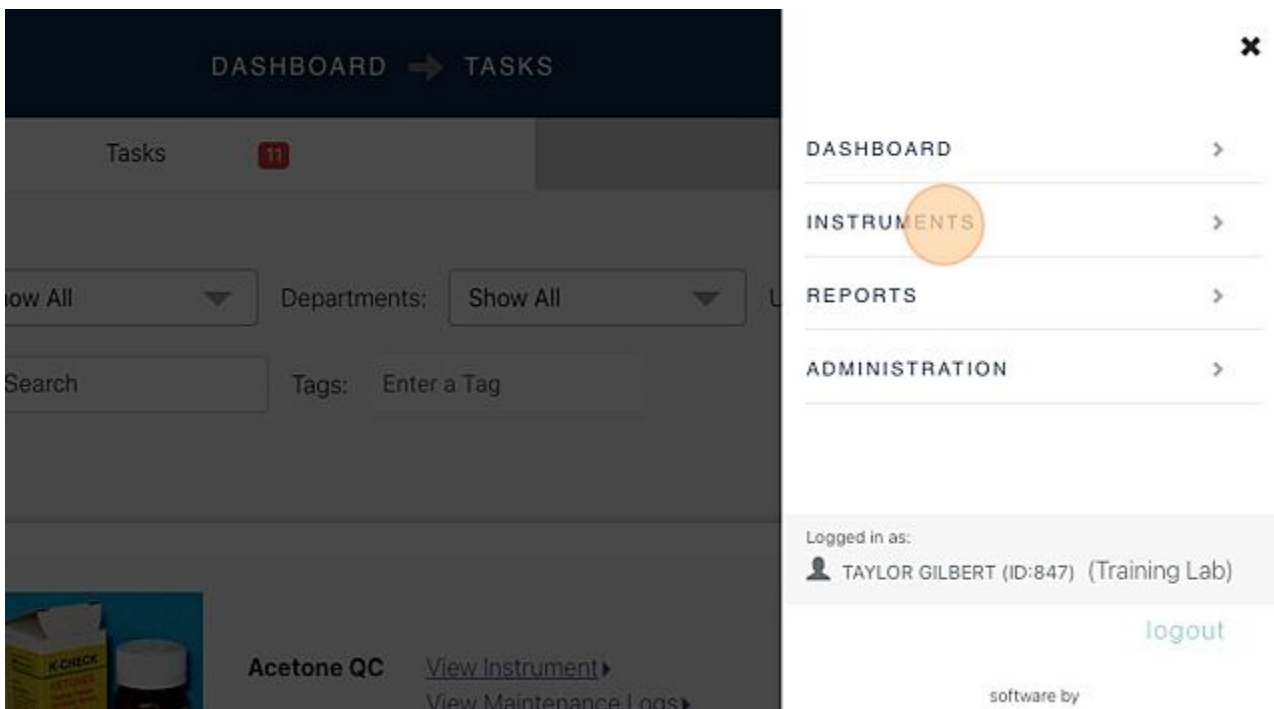
2. Click on the *i* in the top right corner of the instrument tile
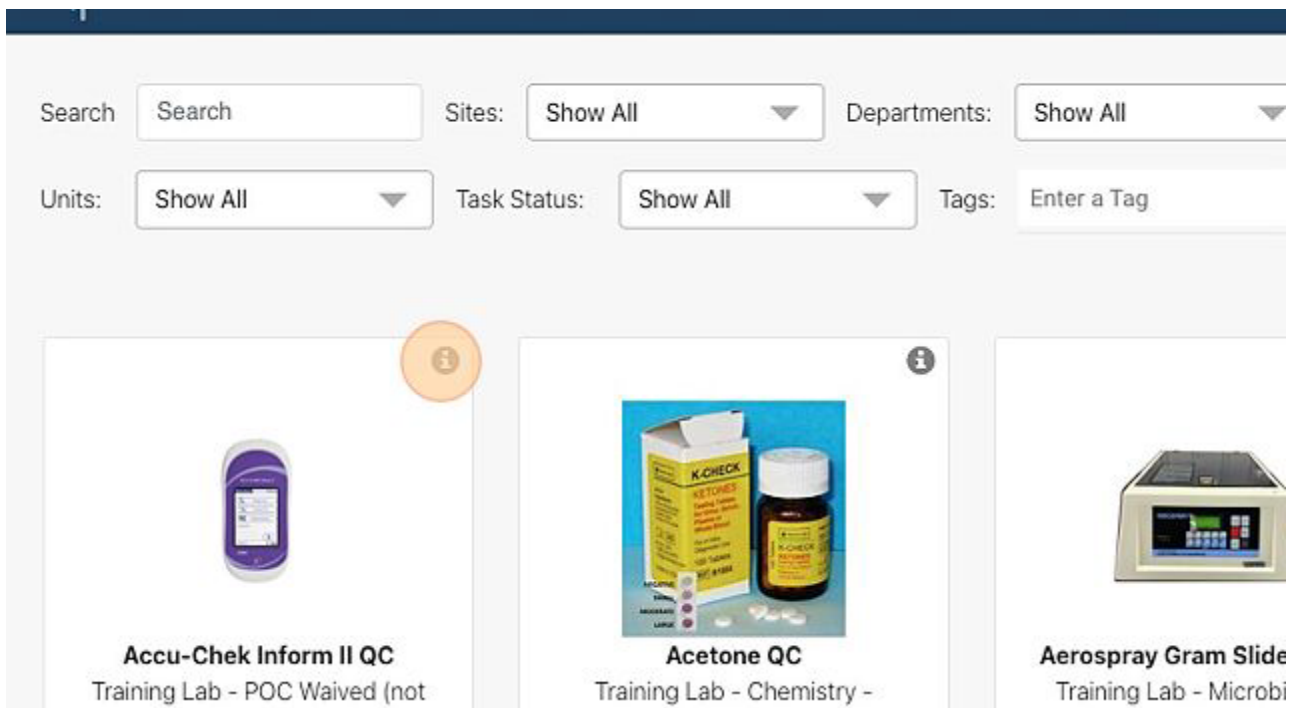
3. In the box that pops up, click the dropdown arrow under "Change Status:"
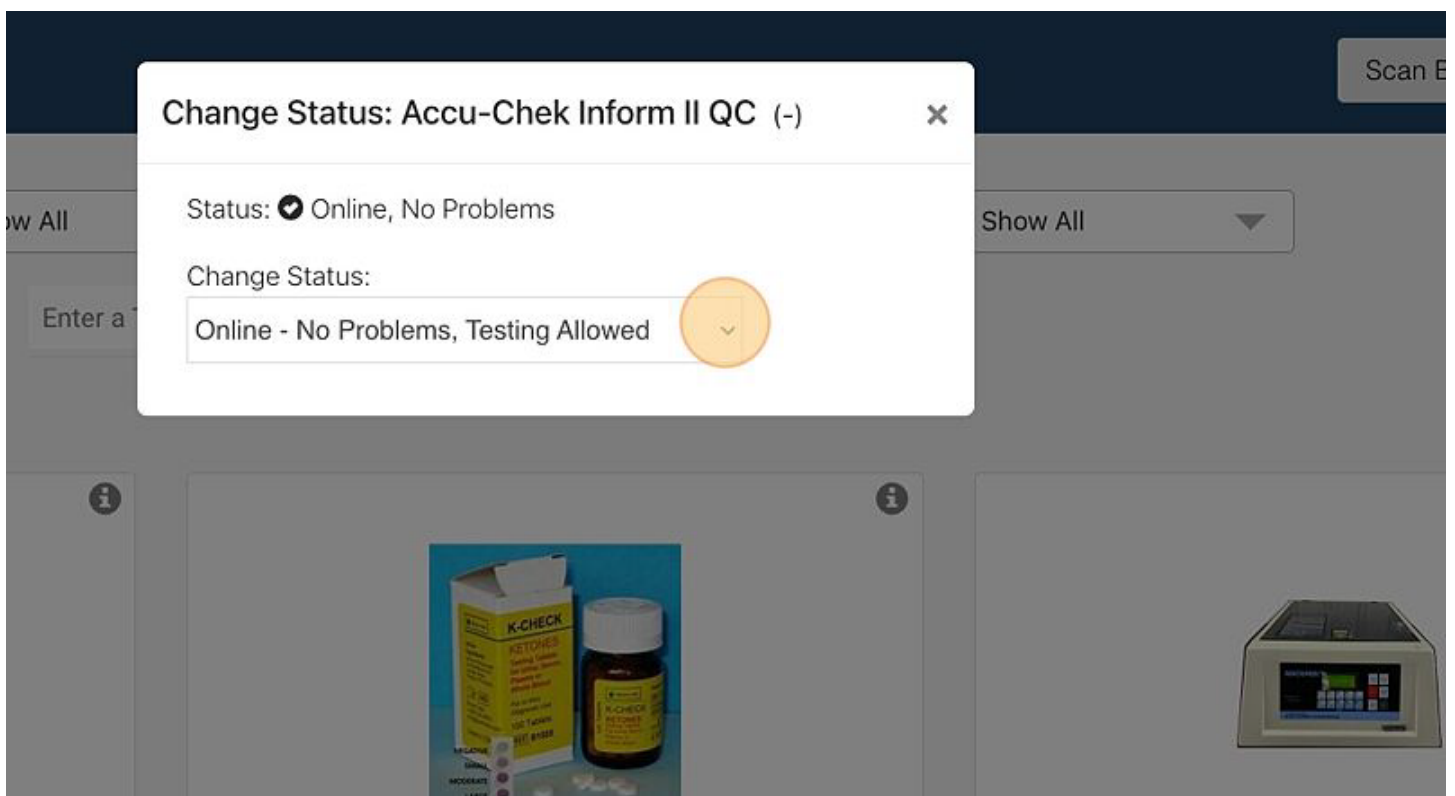
4. The following list will appear, select the appropriate status
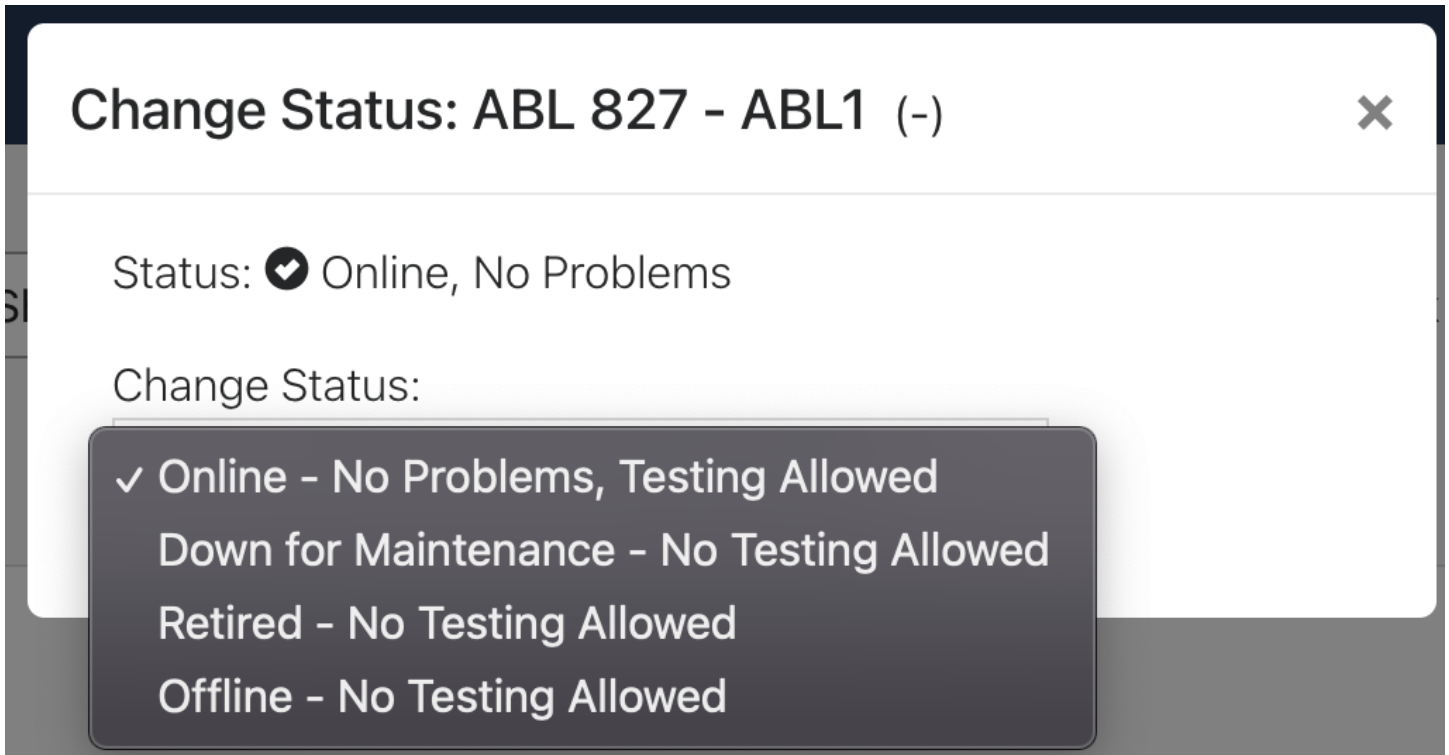
Below is an explanation of the difference between each and their functionality.

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
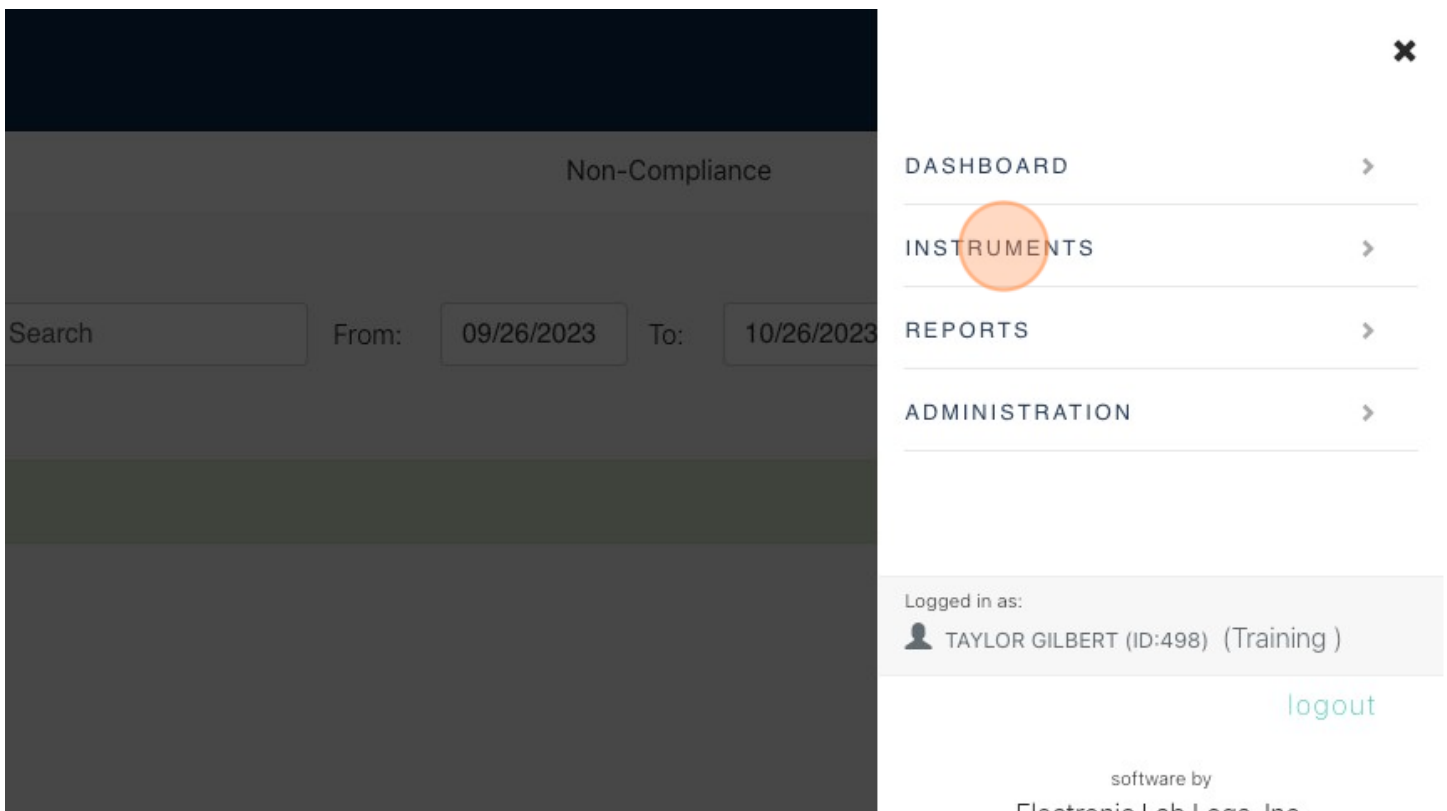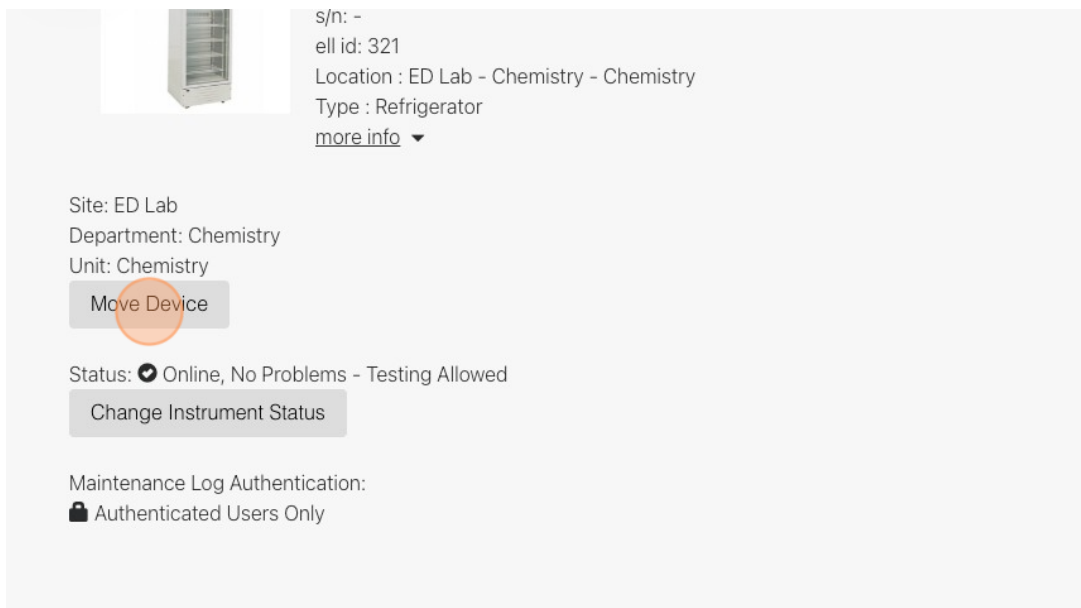
2. Select the instrument you need to move
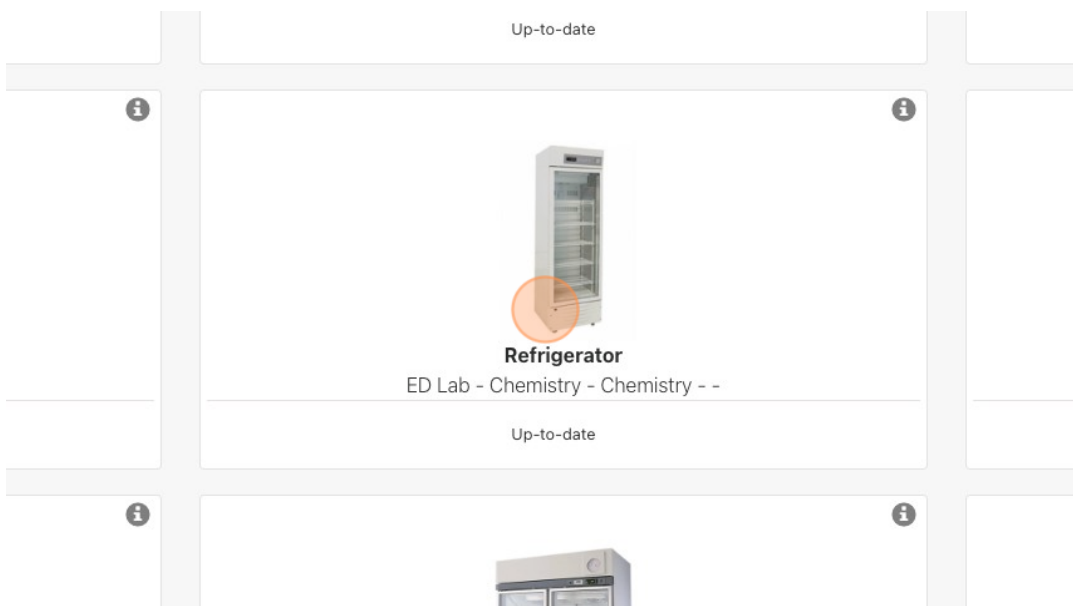
3. Select "more info"

4. Select "Move Device"

5. Select the appropriate change from the drop-down menus
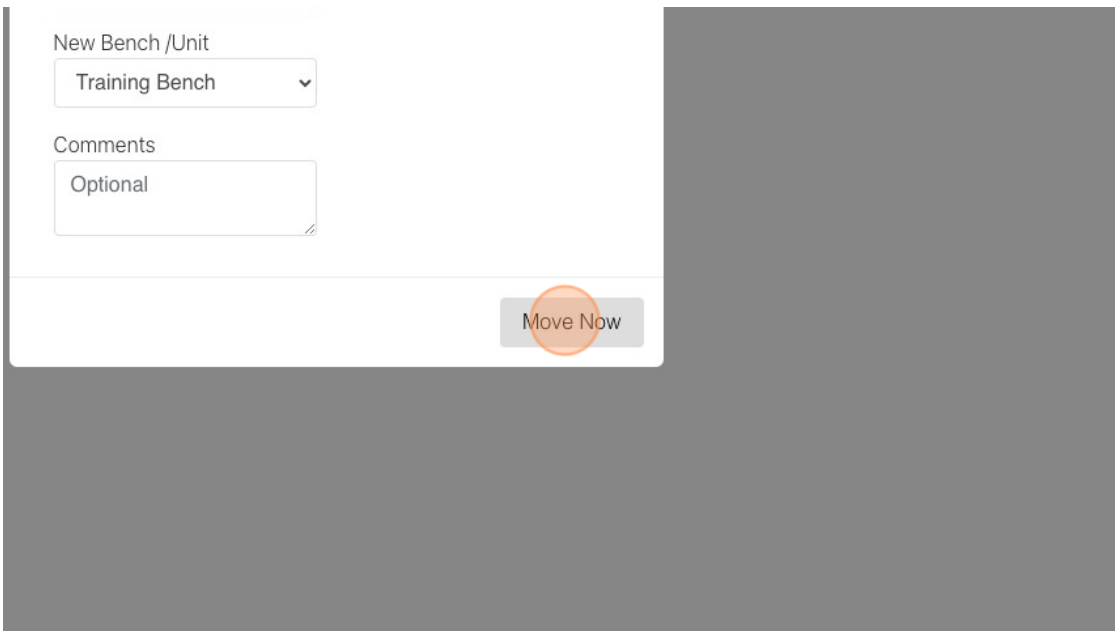
6. Select "Move Now" when complete

New Bench /Unit

Training Bench

Comments

Optional

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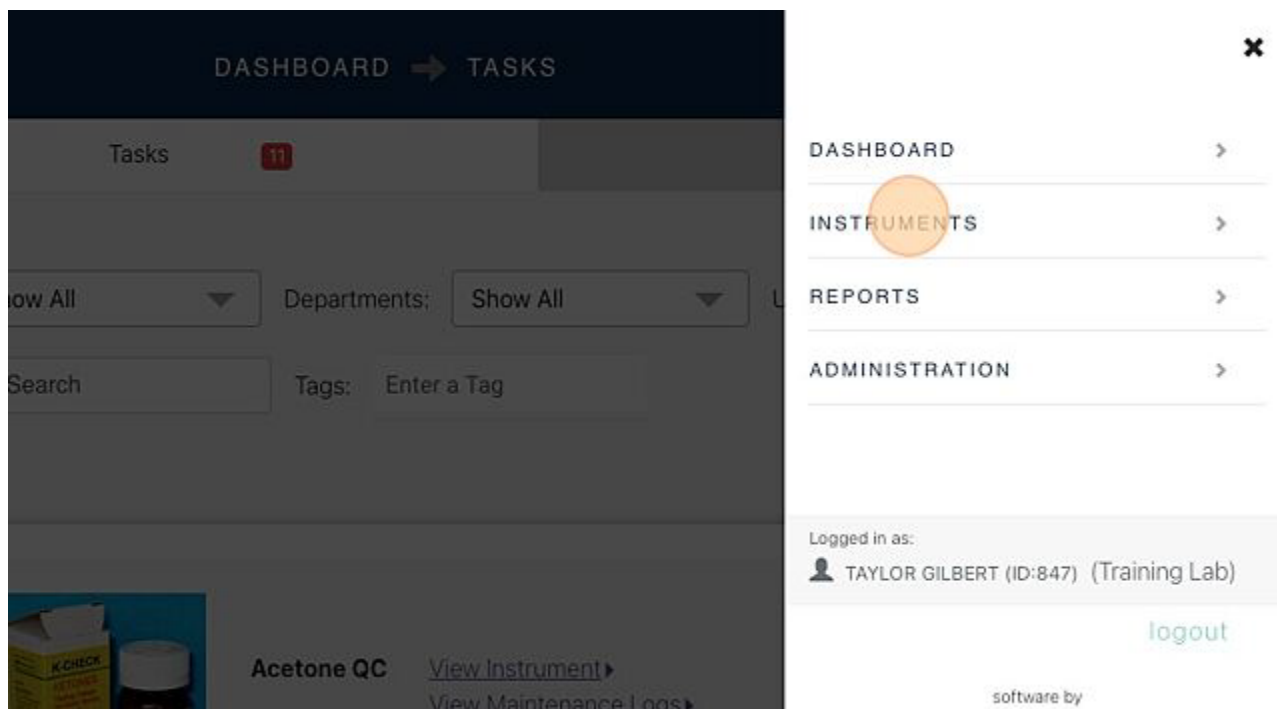
2. Select the instrument that you need to add a report

Show All ▼   Task Status: Show All ▼   Tags: Enter a Tag

Acetone QC
Training Lab - Chemistry - Chemistry - 1

Overdue

Aerospray Gram Slide Stainer
Training Lab - Microbiology - Microbiology - -

Up-to-date

Amniotest
Training Lab - Point of Care - Poin of Care - -
Tags: 123

Up-to-date

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

Location : Training Lab - Microbiology - Microbiology
Type : Wescor Gram Slide Stainer
more info ▶

| All Tasks | Reports |

s (2)   show files ▶

➕ Add Service Report

eagents

t A New Features
ber: **Not Specified**
n Date: **No Expiration**

✏ it Lot

Reagent B
Lot Number: **Not Specified**
Expiration Date: **No Expiration**
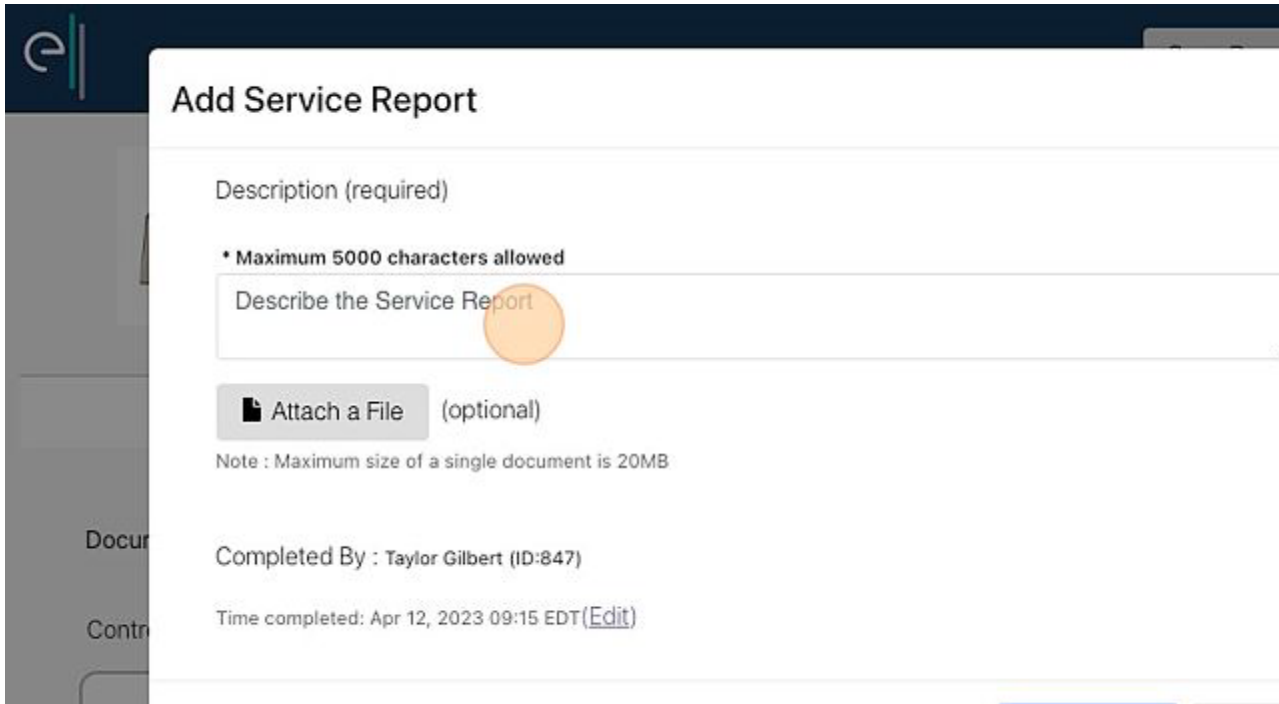
✏ Edit Lot

Reagent C
Lot Number: **Not Specified**
Expiration Date: **No Expiration**
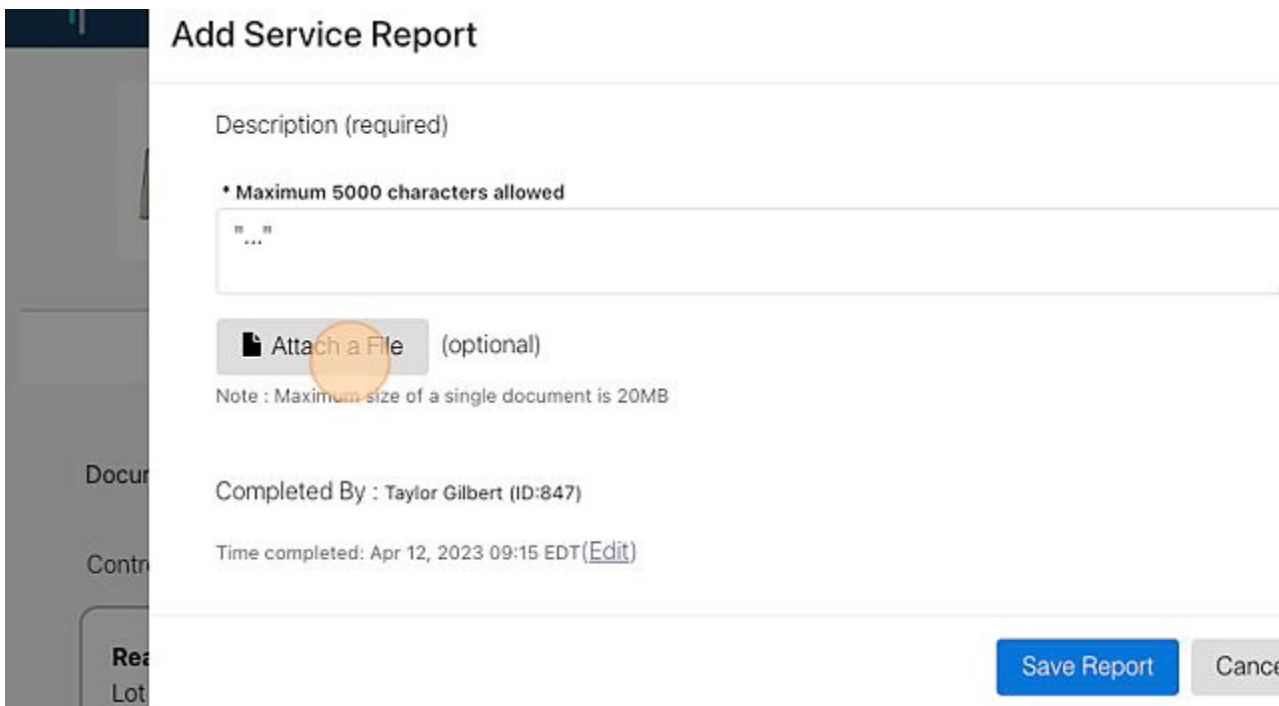
✏ Edit Lot

4. Type a description of the report

5. Attach the PDF file (optional)

6. Select "Save Report" when complete

PL901-20_en03.pdf

Completed By : Taylor Gilbert (ID:847)

Time completed: Apr 12, 2023 09:15 EDT (Edit)

Save Report   Cancel

t D
ber: **Not Specified**
n Date: **No Expiration**

it Lot

Reagent E
Lot Number: **Not Specified**
Expiration Date: **No Expiration**

✏ Edit Lot

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 [How to Clone a Lot Article](#) 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.

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

1. Follow the steps in [Enter a New Reagent or Control](#) 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 [Add a Maintenance Task that is Linked to a Reagent or Control](#) for assistance.

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.
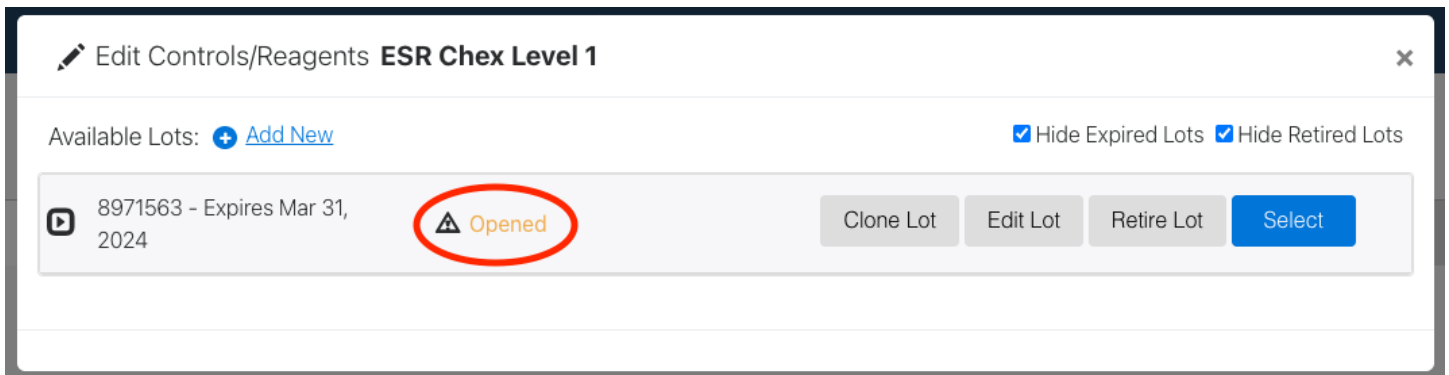
When you enter a "Date in Use" you will see this status.
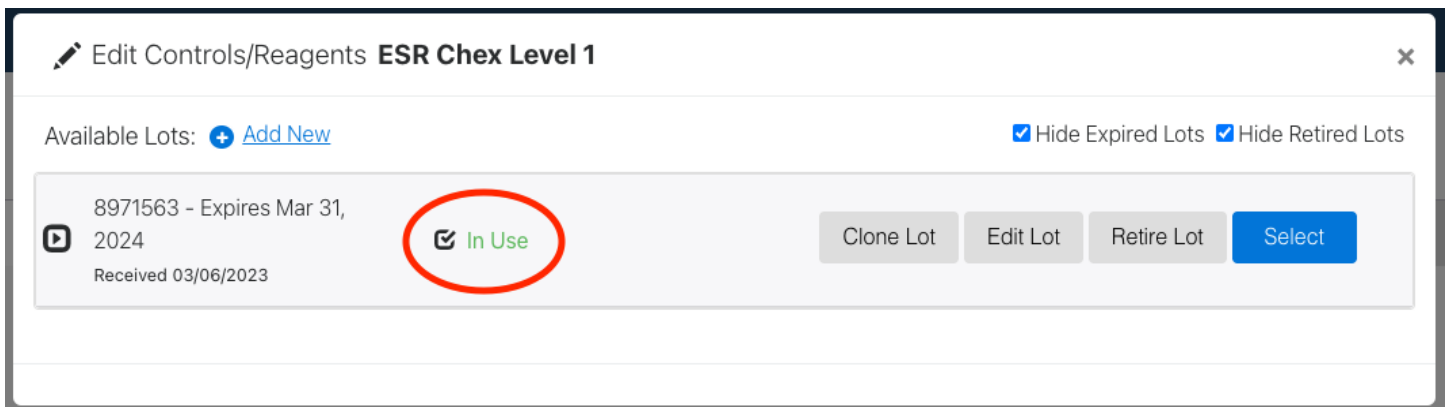
This status shows that the control/reagent will expire in 3 days. The status will give you a notice and countdown for 7 days before the expiration when an expiration date has been entered.
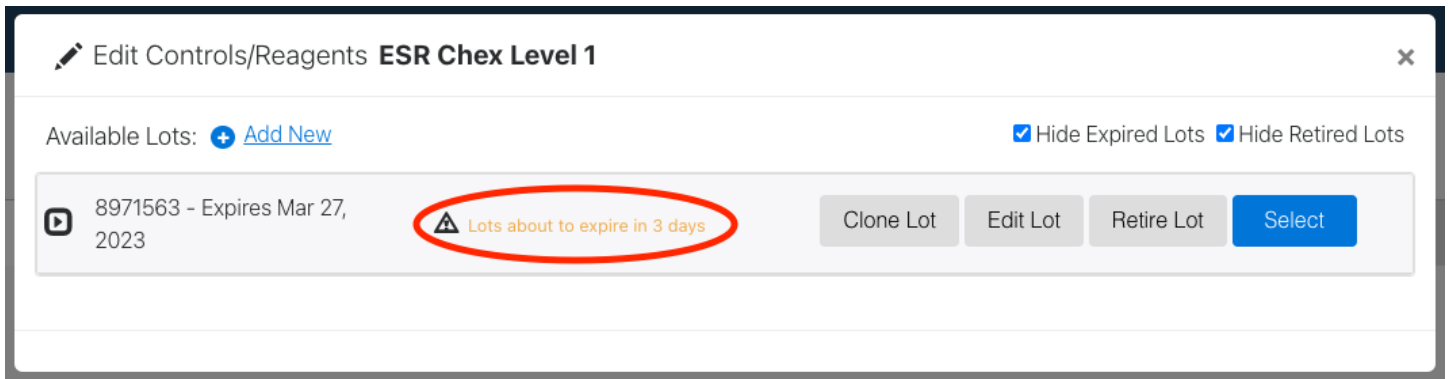
On the final day of expiration the status will look like this.
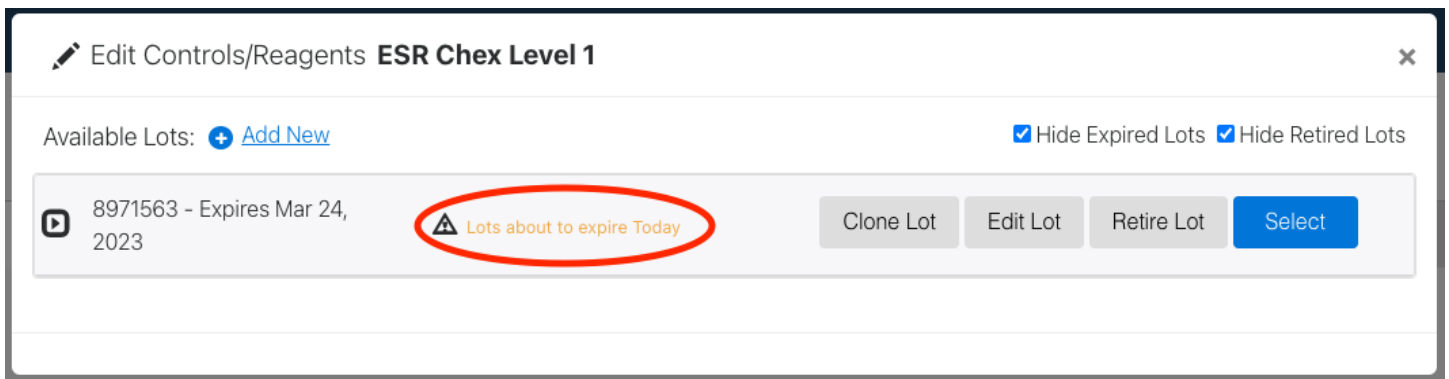
Once the control/reagent has expired the status will look like this. You will not see it on the list of lots available unless you uncheck the Hide Expired Lots box as in this example.
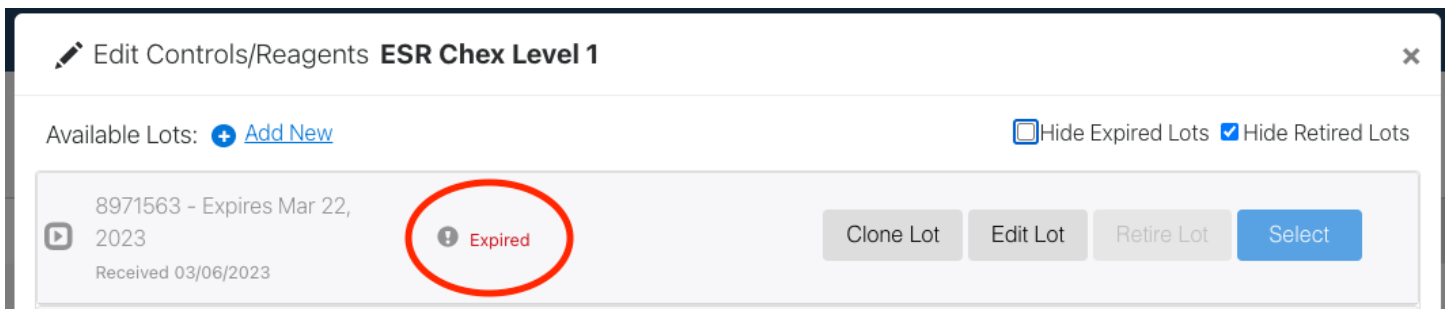
When you enter a "Discarded Date" will see this status. When your lot is discarded the Controls/Reagents box for that lot will turn pink.

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
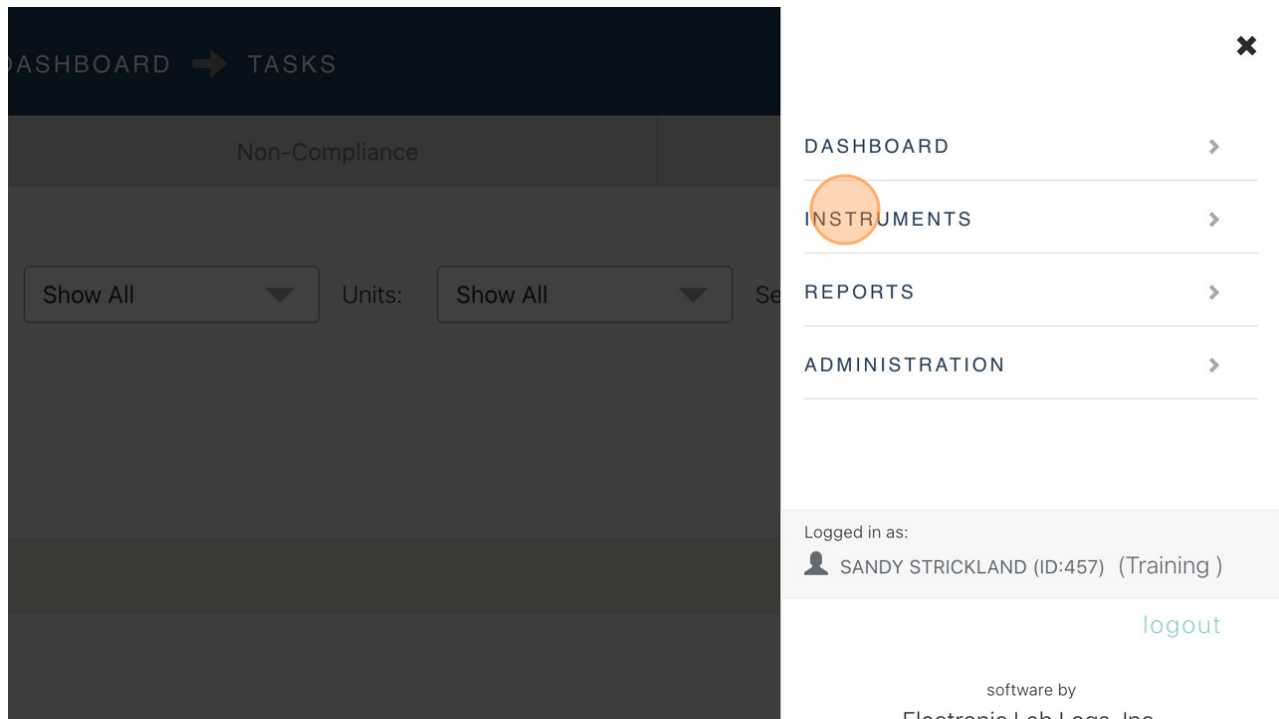
2. Select the instrument you are working with

Abbott ID Now

Point of Care – POC – POC – AR23790902

Up-to-date

ABL 800

Point of Care – POC – POC – 180239

Up-to-date

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

more info ▶

All Tasks

Controls/Reagents

Kit ⓘ

Lot Number: **1**

Expiration Date: **Aug 31, 2023**

❗ Expired

✎ Edit Lot

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"
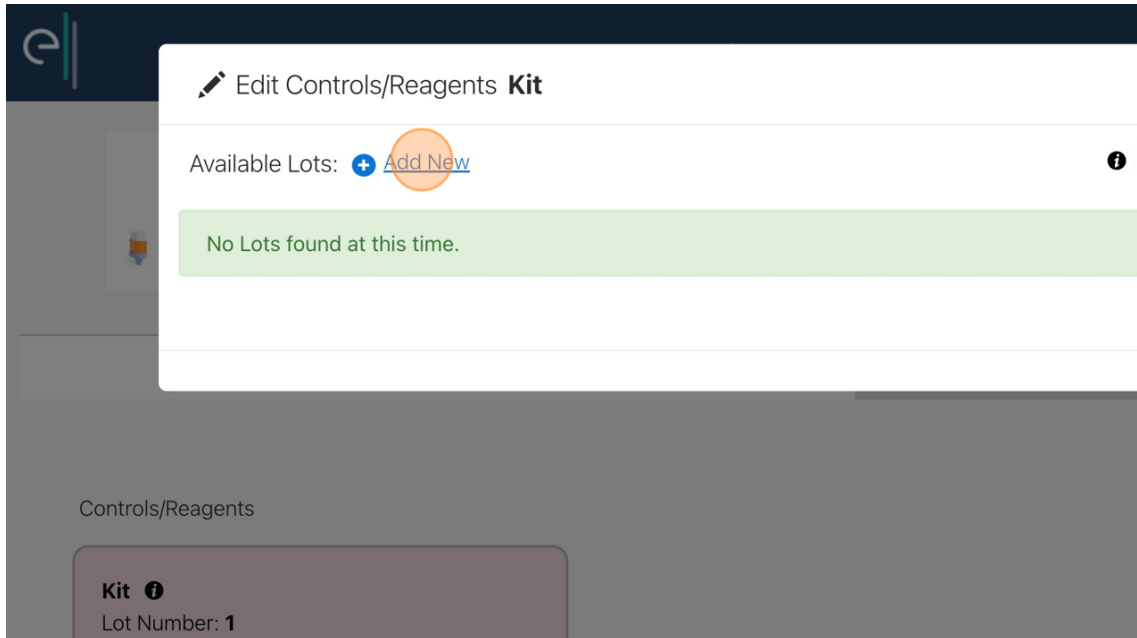
5. Fill in the necessary information
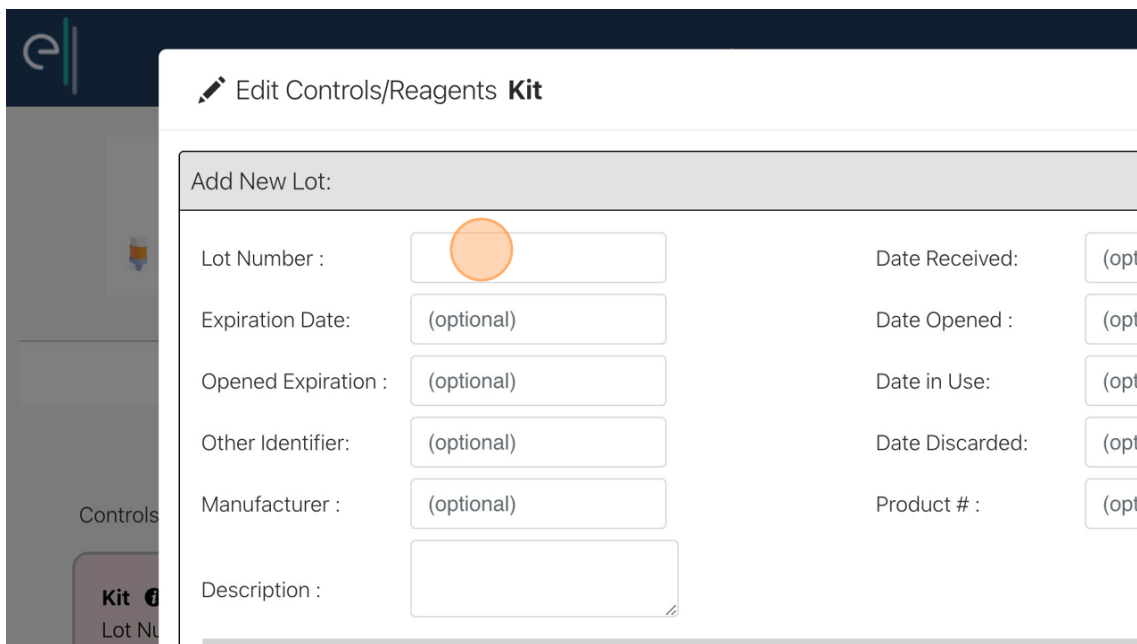
6. Select "Save" when finished

Other Identifier :   (optional)   Report

Other Identifier :   (optional)

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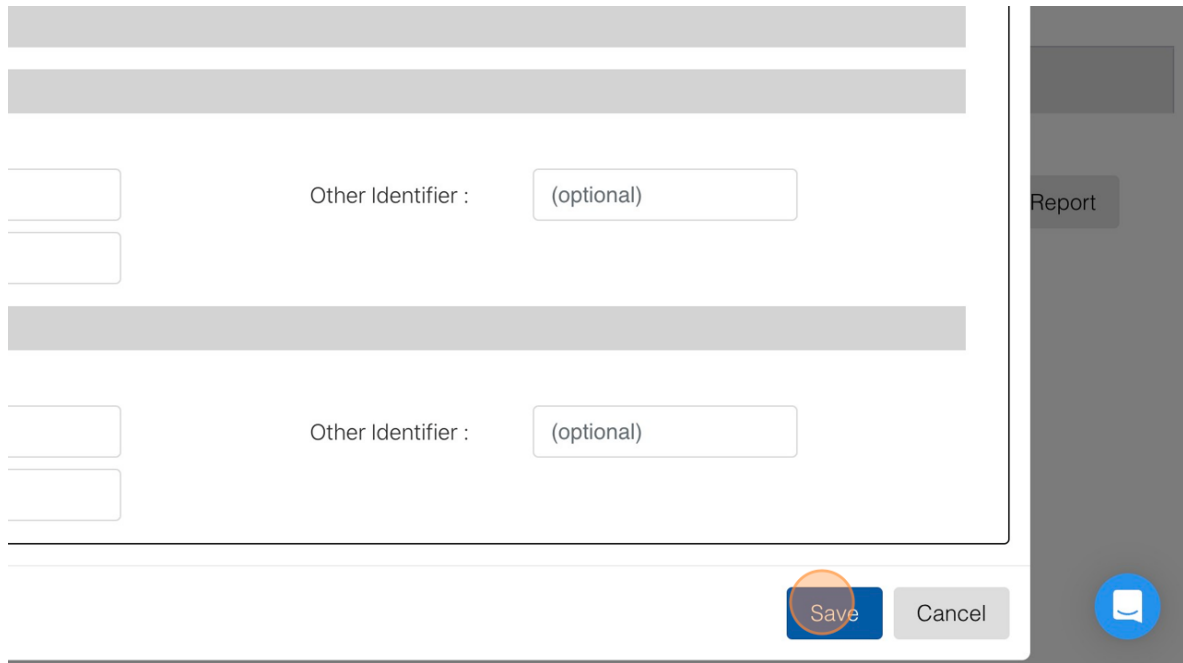
7. Select "Select" beside the lot you want active

✕

ⓘ ☑ Hide Expired Lots ☑ Hide Retired Lots

ⓘ   Clone Lot   Edit Lot   Retire Lot   Select

➕ Add Service Report
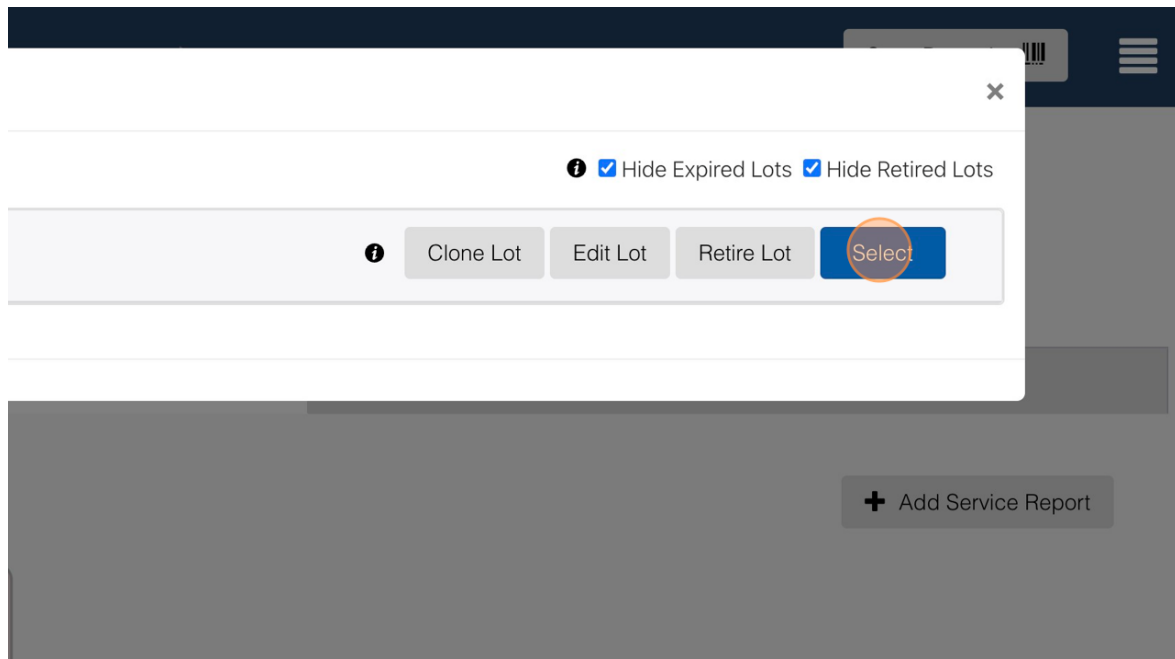
8.

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 Manage Control/Reagent lots 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.
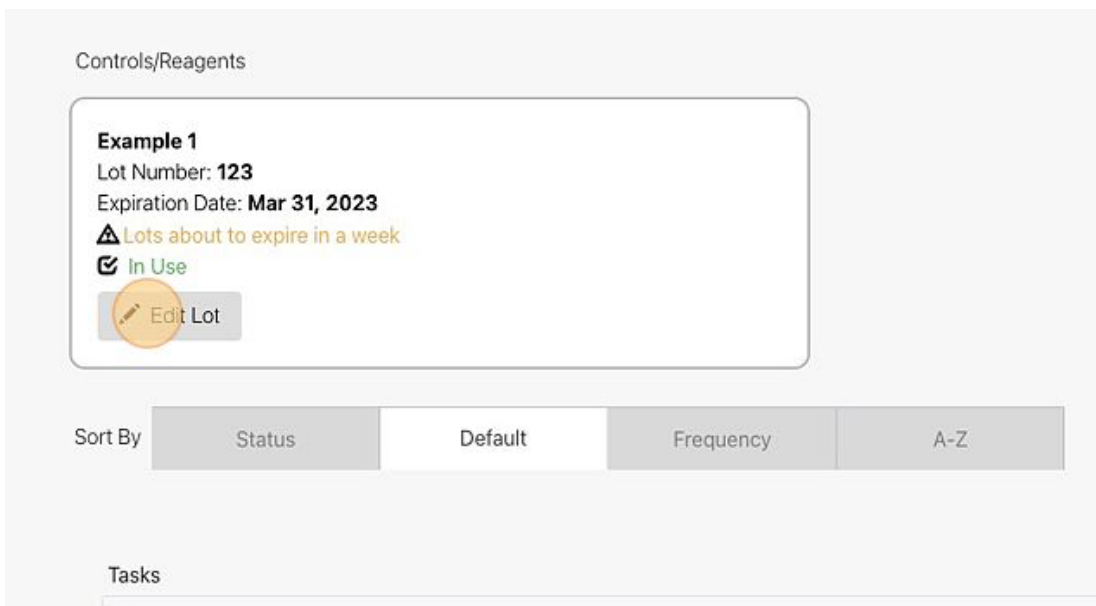
3. Click here to expand the lot information (if needed).
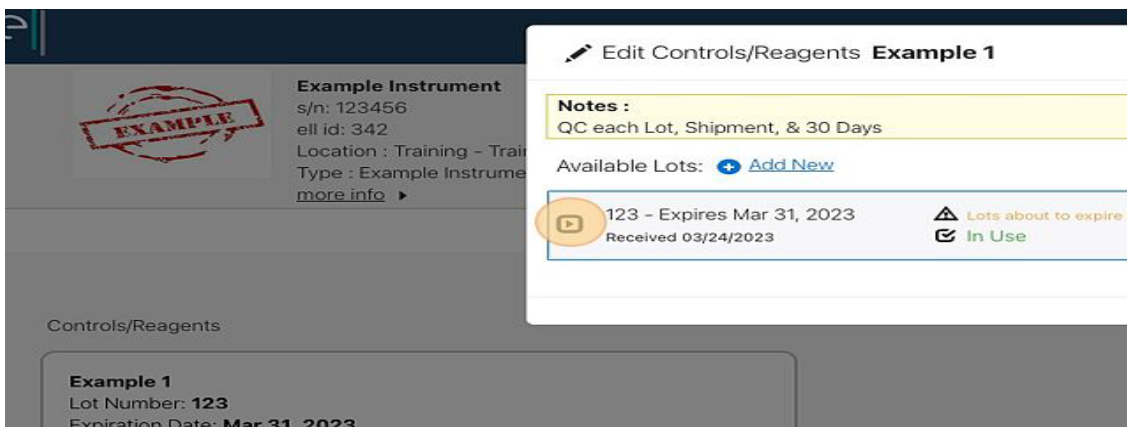
4. Click "Clone Lot"
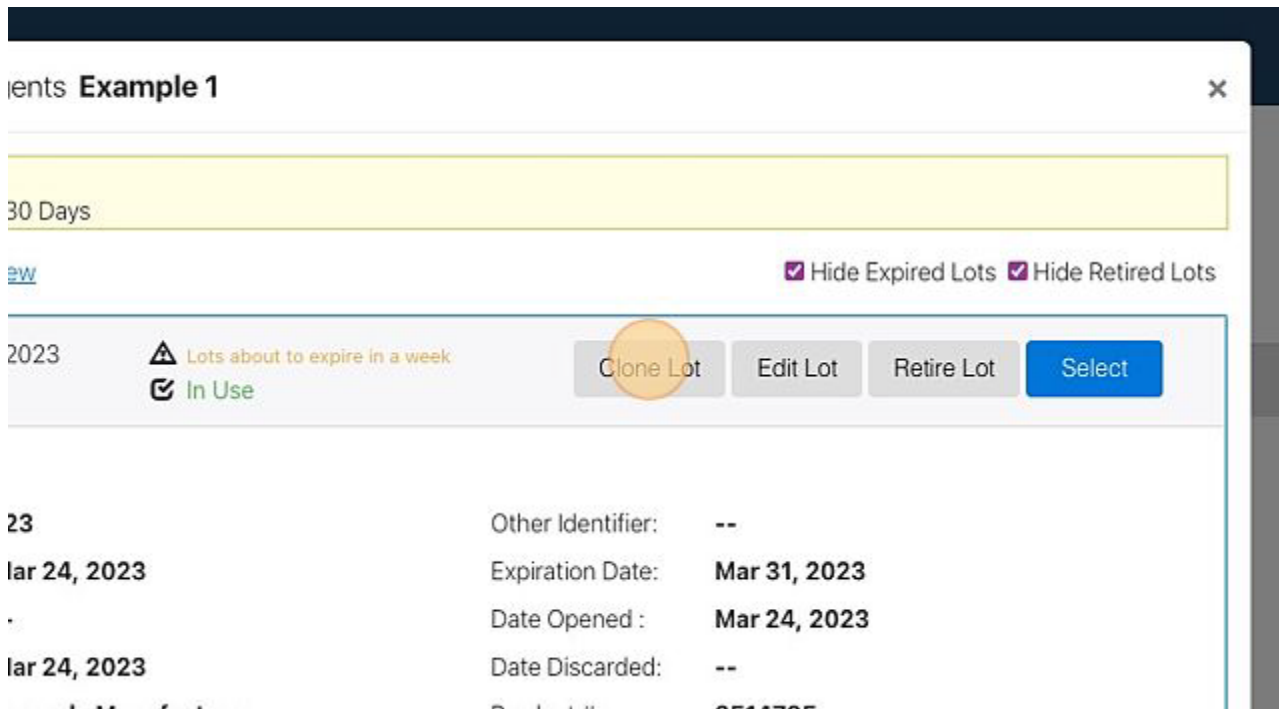
5. Click the "Date Received" field.
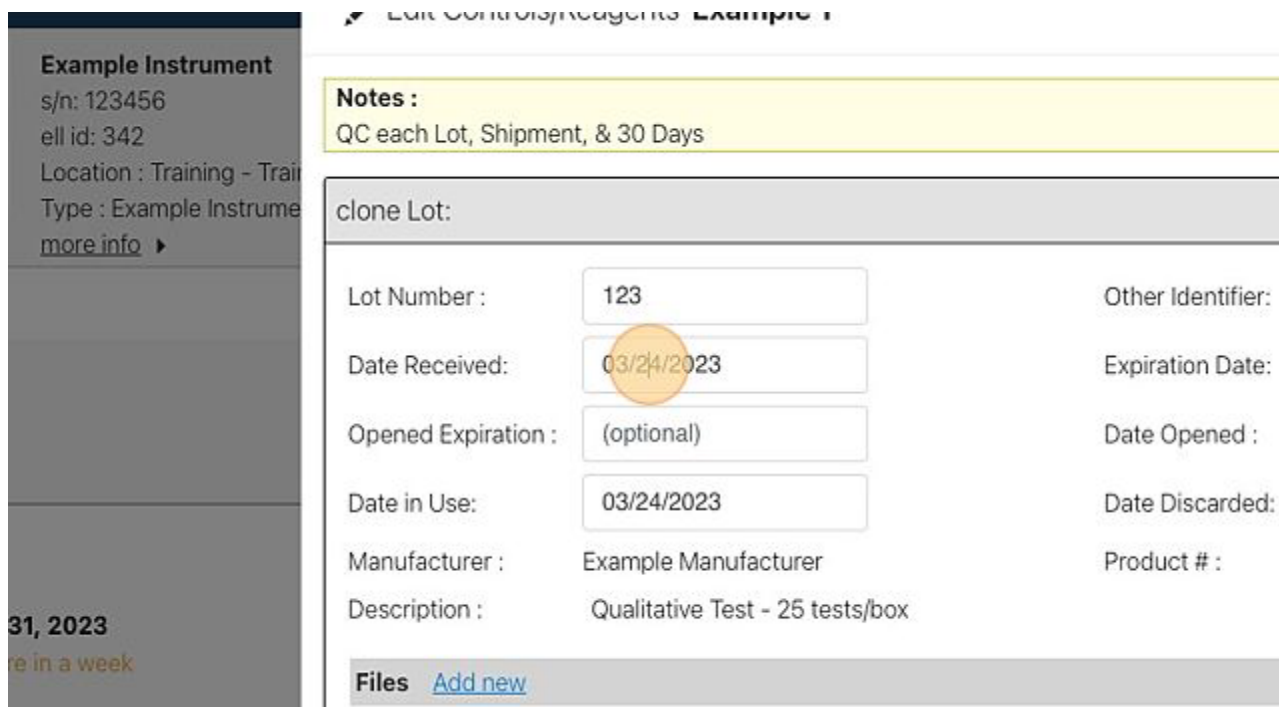
6. Select the Received Date for the New Shipment.

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

8. Click "Save"
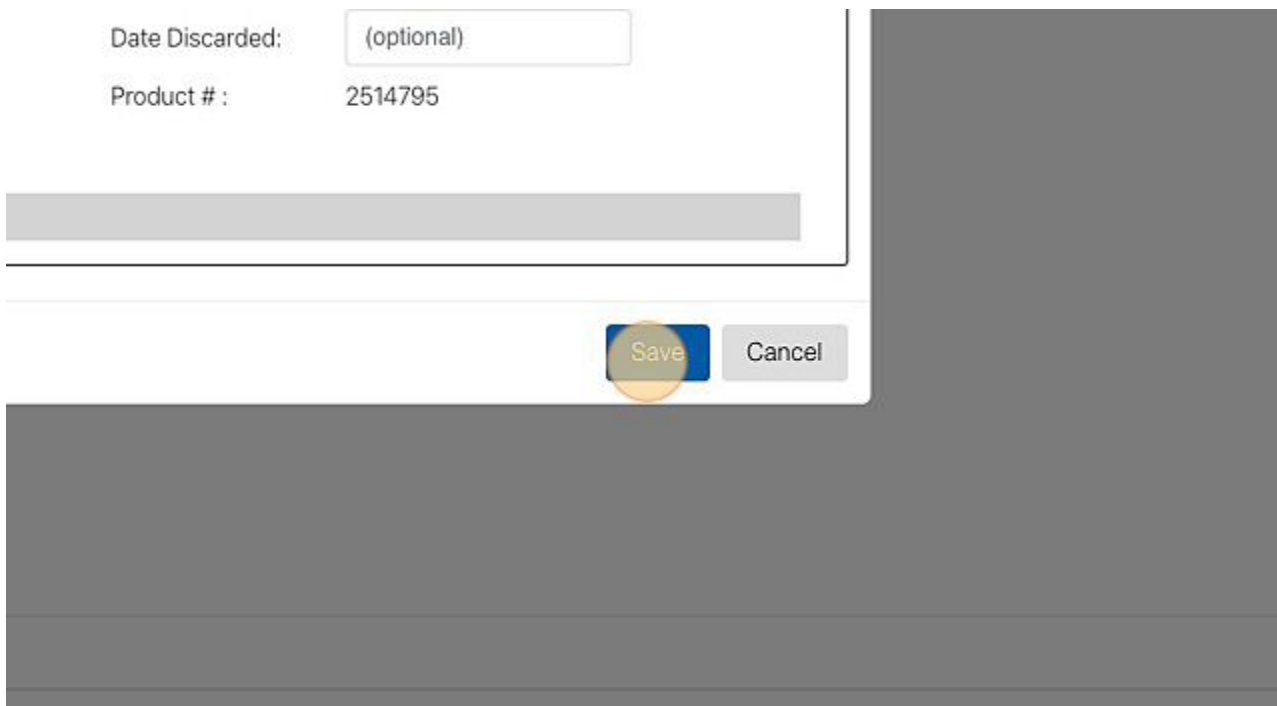
9. The cloned lot with the New Received Date appears at the bottom of the list. You can Click the arrow to expand the lot details.
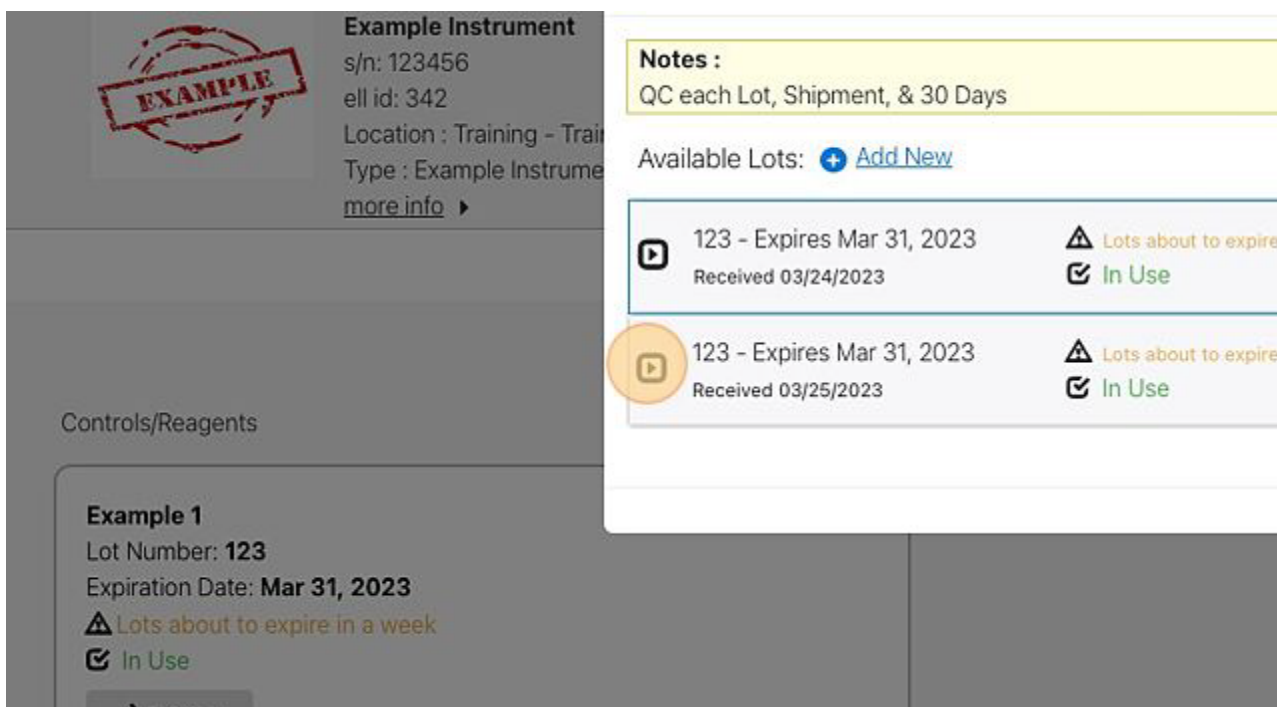
10. Notice the new Received Date and other edited details.

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

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
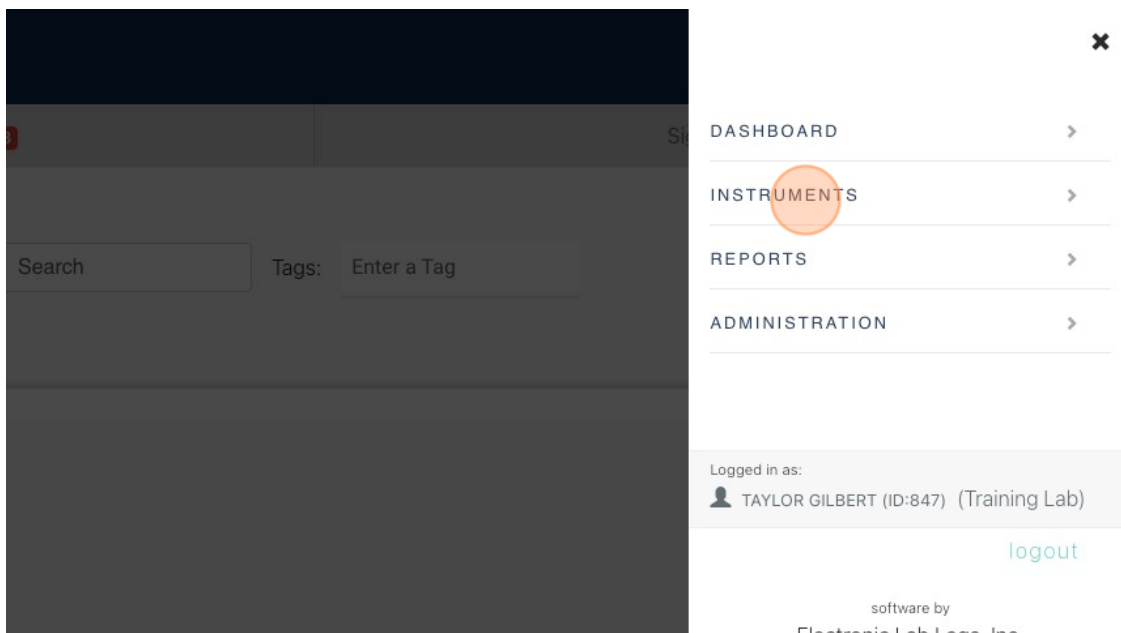
2. Select the desired instrument
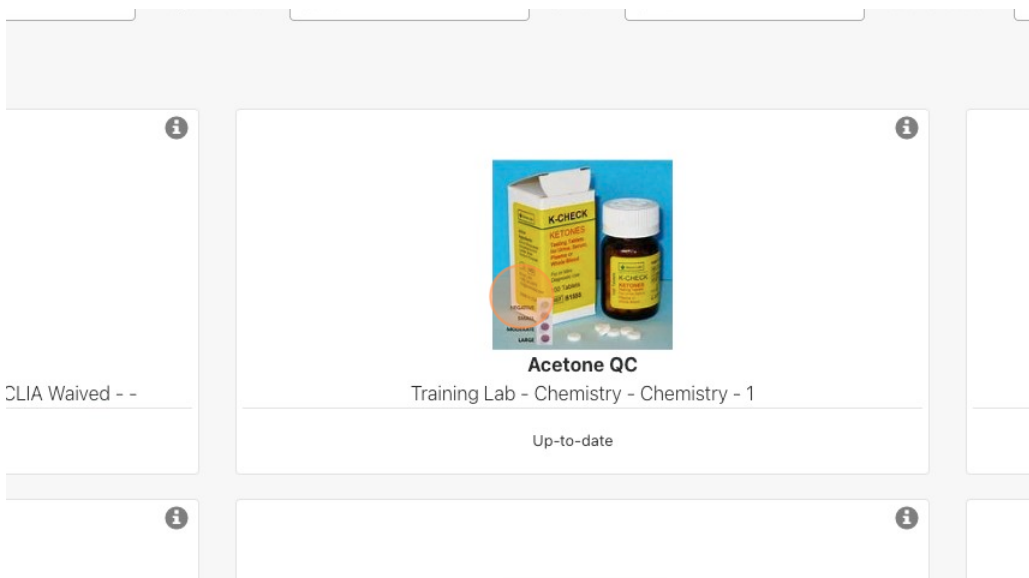
3. Select "Edit Lot" under the Controls/Reagents
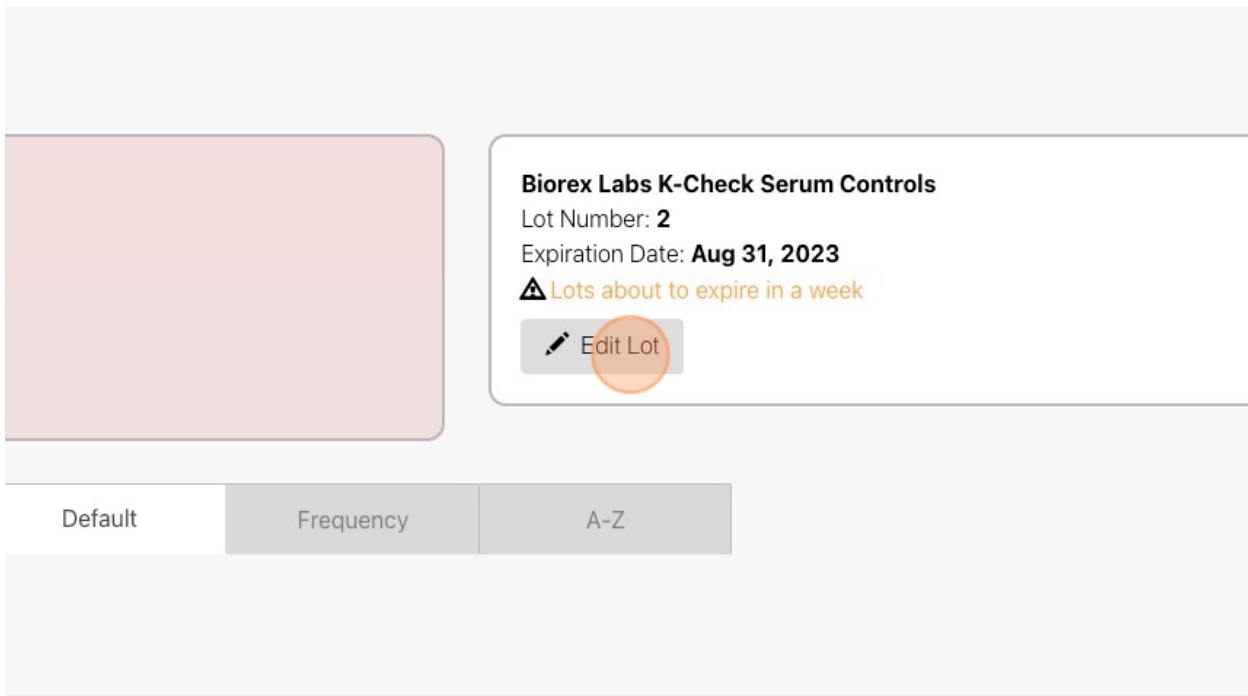
4. Under Available Lots, select "Retire Lot" beside the lot you need to retire
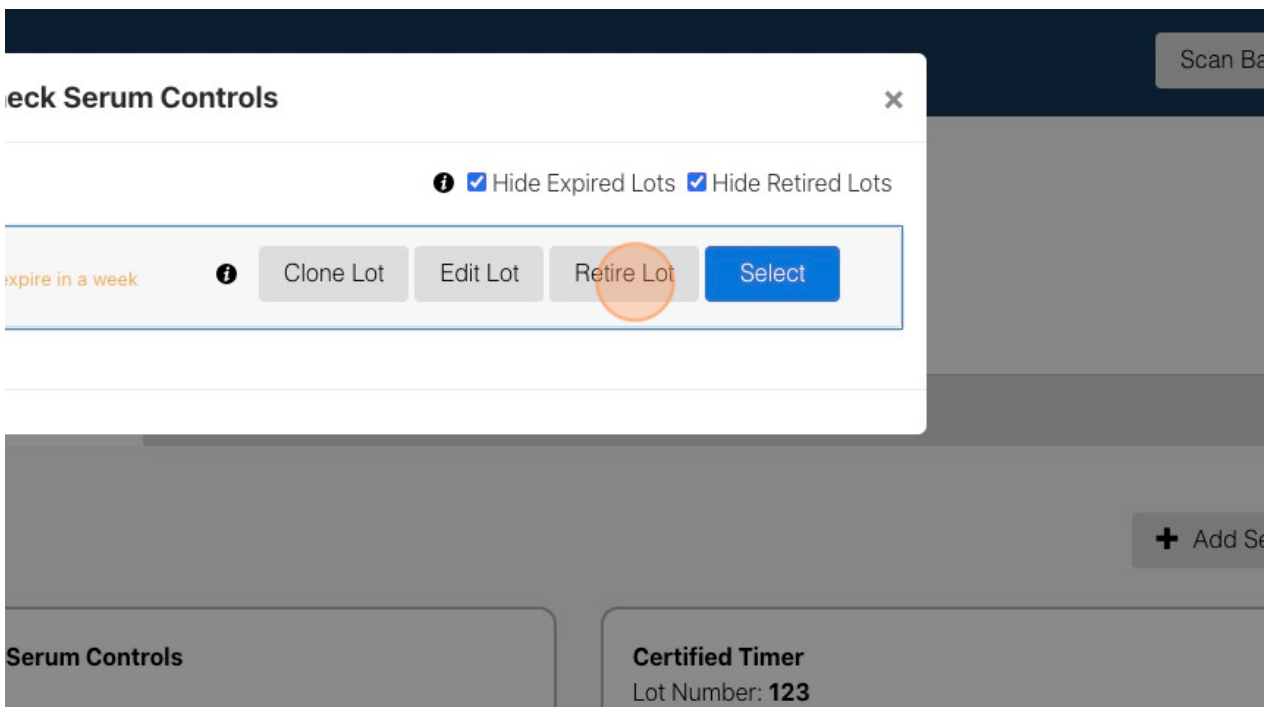
5. You may then enter a comment in the box (optional) then select "Retire Lot"

NOTE: This action cannot be undone.

"..."

Retire Lot   Cancel

Frequency   A-Z

B
L
E:
⚠

Certifie
Lot Num
Expiratic
⚠ Lots

✏ Ed
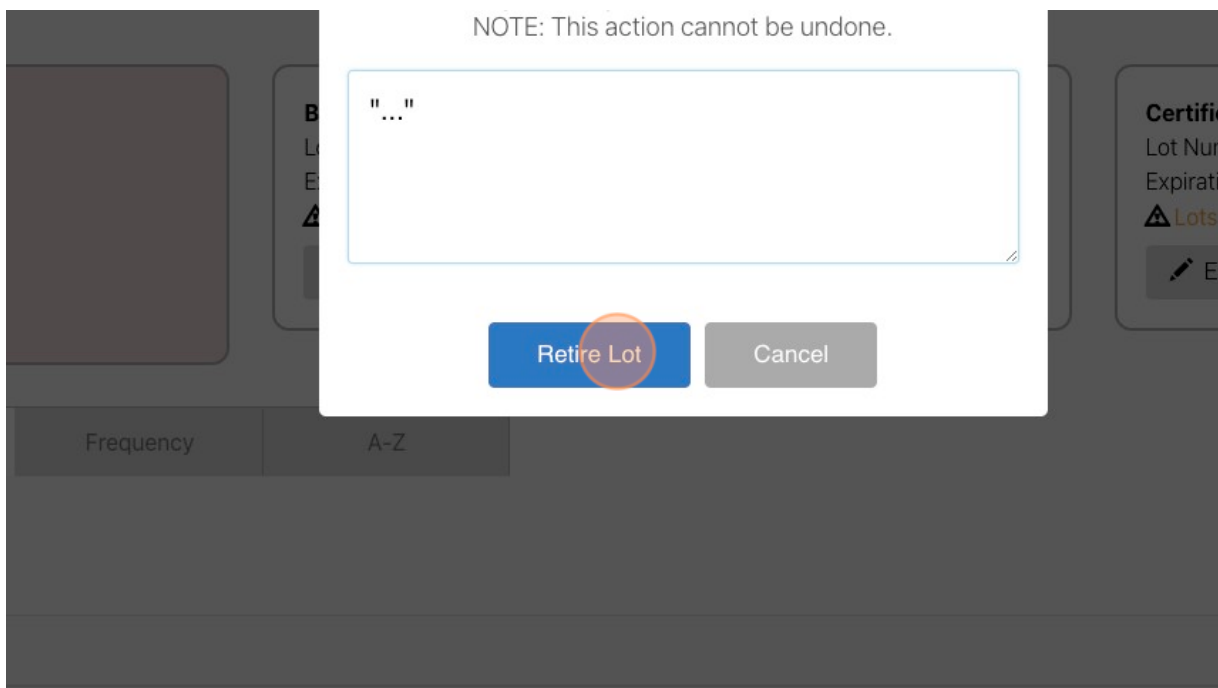
View Maintenance Logs

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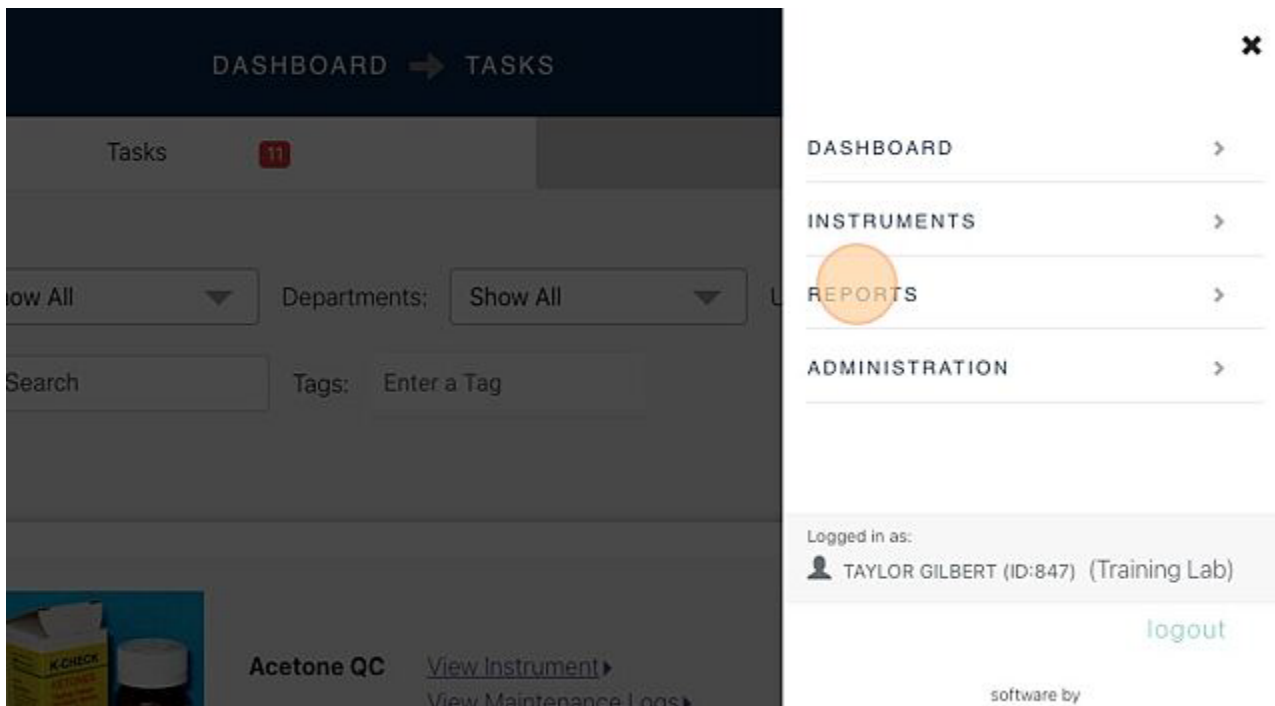
2. On the left of the page select "Maintenance Logs"

Scan Barc

Monthly Reports ▶

Maintenance Logs

Sites

Departments

Benches / Units

Instruments

Users

Compliance Reviews

Filters

Sites: Show All ⌄

Departments: Show All ⌄ **Apply**

⊙ Showing All Reports

March 2023

1. **Blood Bank** Training Lab
   Report not Created

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

MAINTENANCE LOGS REPORT

Scan Barc

Maintenance Logs

Filters

ing Lab ⌄ Departments: Hematology ⌄ Benches/Units: Hematology ⌄

Show All ⌄ Date Range: From 05/01/2023 To 05/31/2023 **Apply** **Expo**

strument 1 of 10 Next >

4. Select "Apply" to apply the filters

Maintenance Logs

Filters

...ments: Hematology ⌄   Benches/Units: Hematology ⌄

⌄   Date Range: From 04/01/2023   To 04/30/2023   Apply   Export Data

ext >

No data

5. Select "Next" until you see the needed instrument logs

Sites: Training Lab ⌄   Departments: Hematology ⌄   Benches/Units:

Instruments: Show All ⌄   Date Range: From 04/01/2023   To

s ▶

< Previous   Instrument 1 of 10   Next >

1.Gastroccult and pH

Serial #: –
Bench/Unit: Hematology

0   0   0   0
Failures   Non-Compliant Events   Service   Dat

ews

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

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

1. Go to the "Instruments" page from the menu
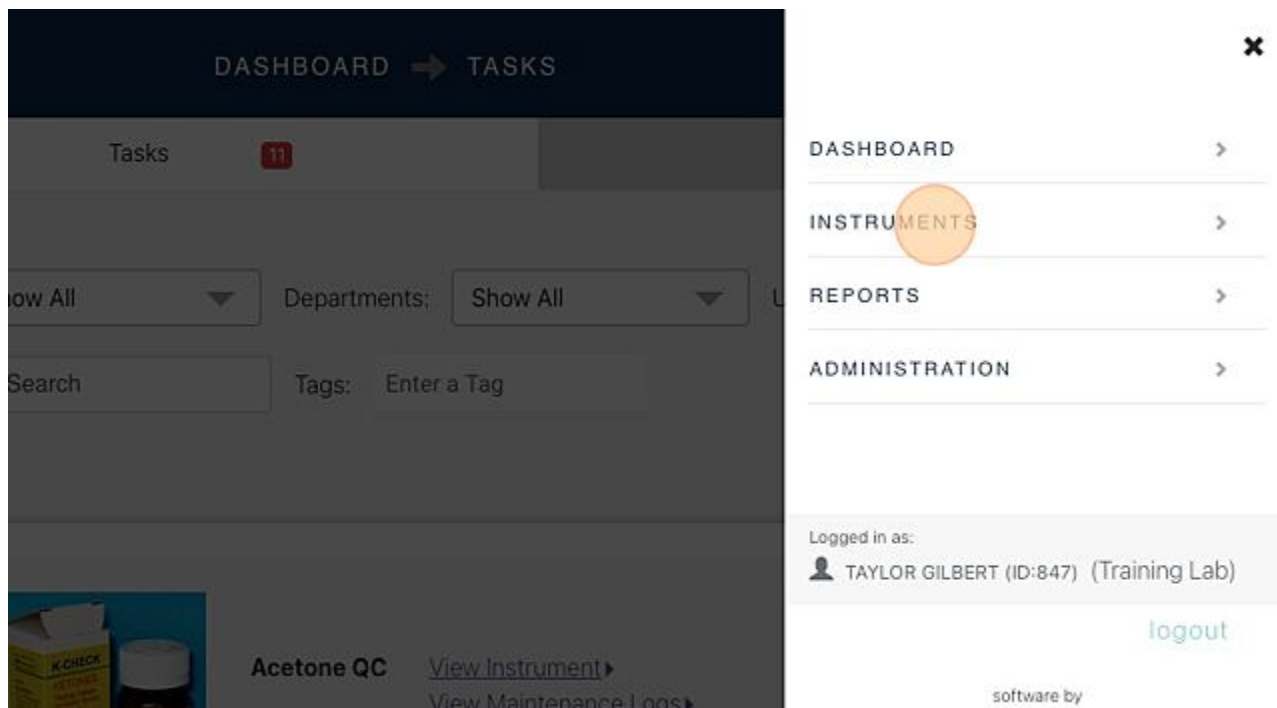
2. Select your Instrument
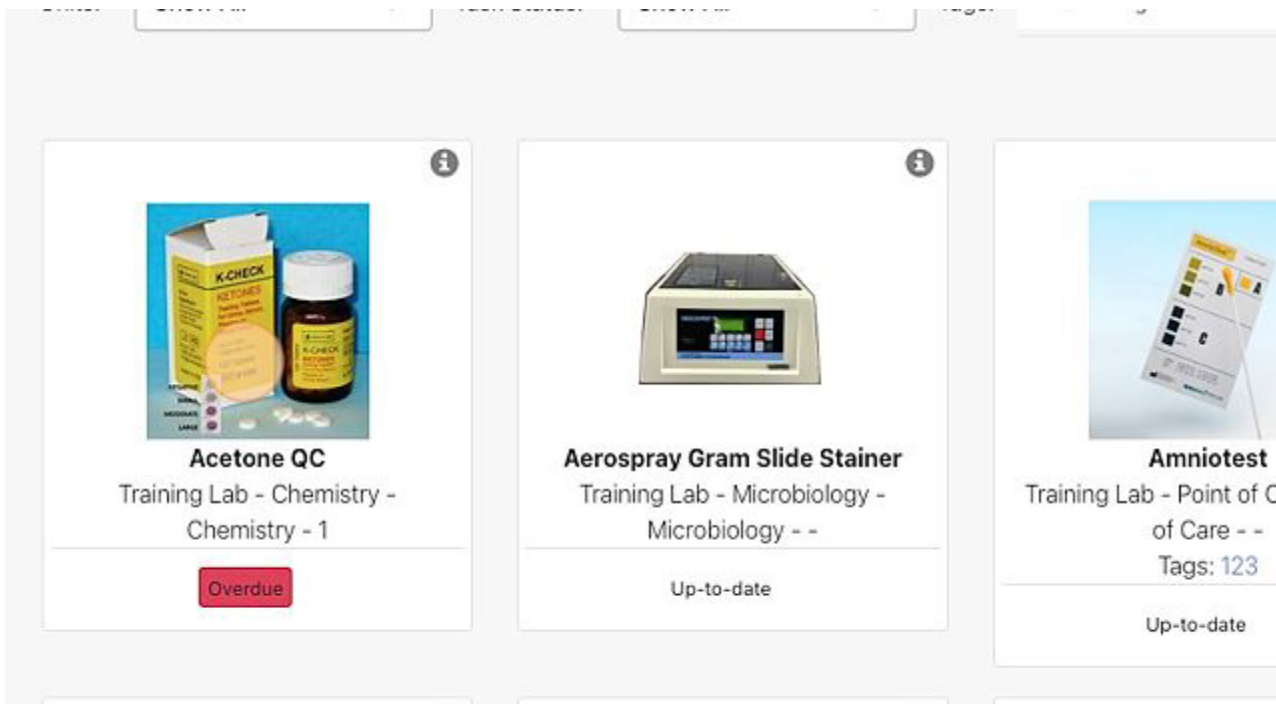
3. Select the "Reports" tab
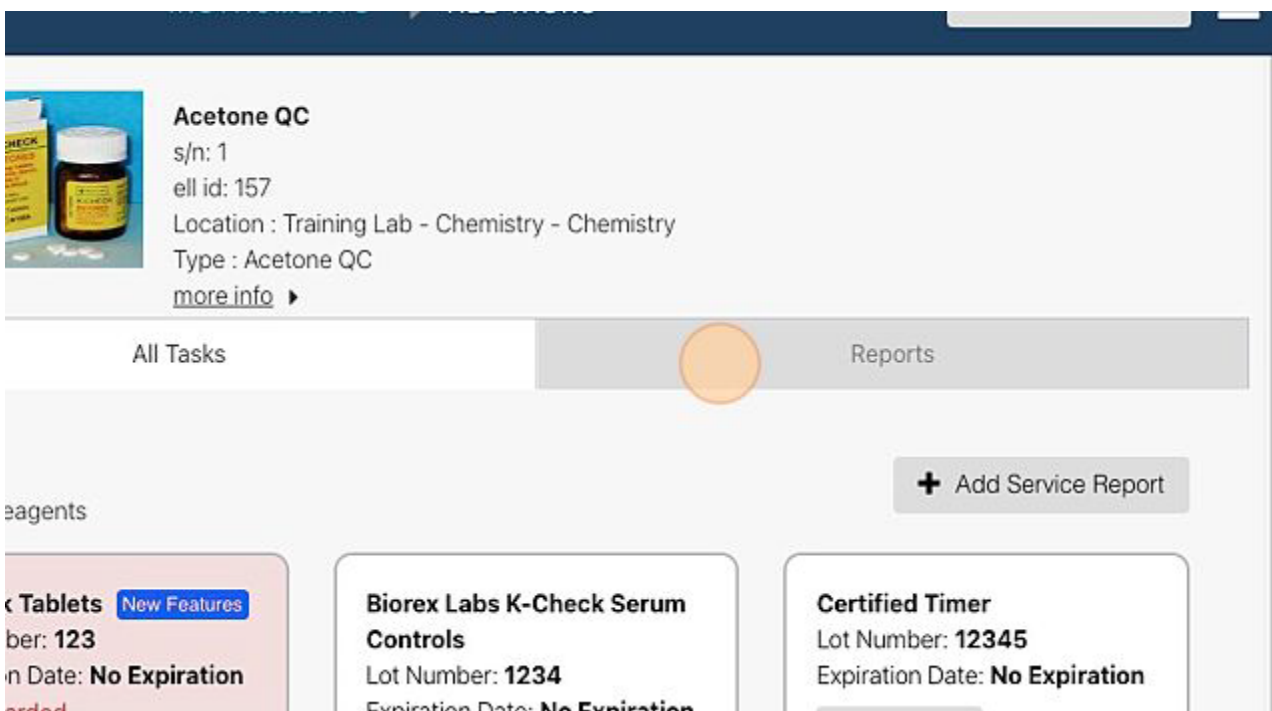
4. Use the filters to set the desired Date Range

Type : Acetone QC
more info ▶

All Tasks	Reports

Filters

Date Range: From 04/01/2023   To 04/30/2023   [Apply]

Calendar View

Apr , 2023 ‹ ›   01 02 03 04 05 06 07 08 09 10 11 12 1

Perform Biorex Lab QC (3 Lev...   ✔   ✖

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
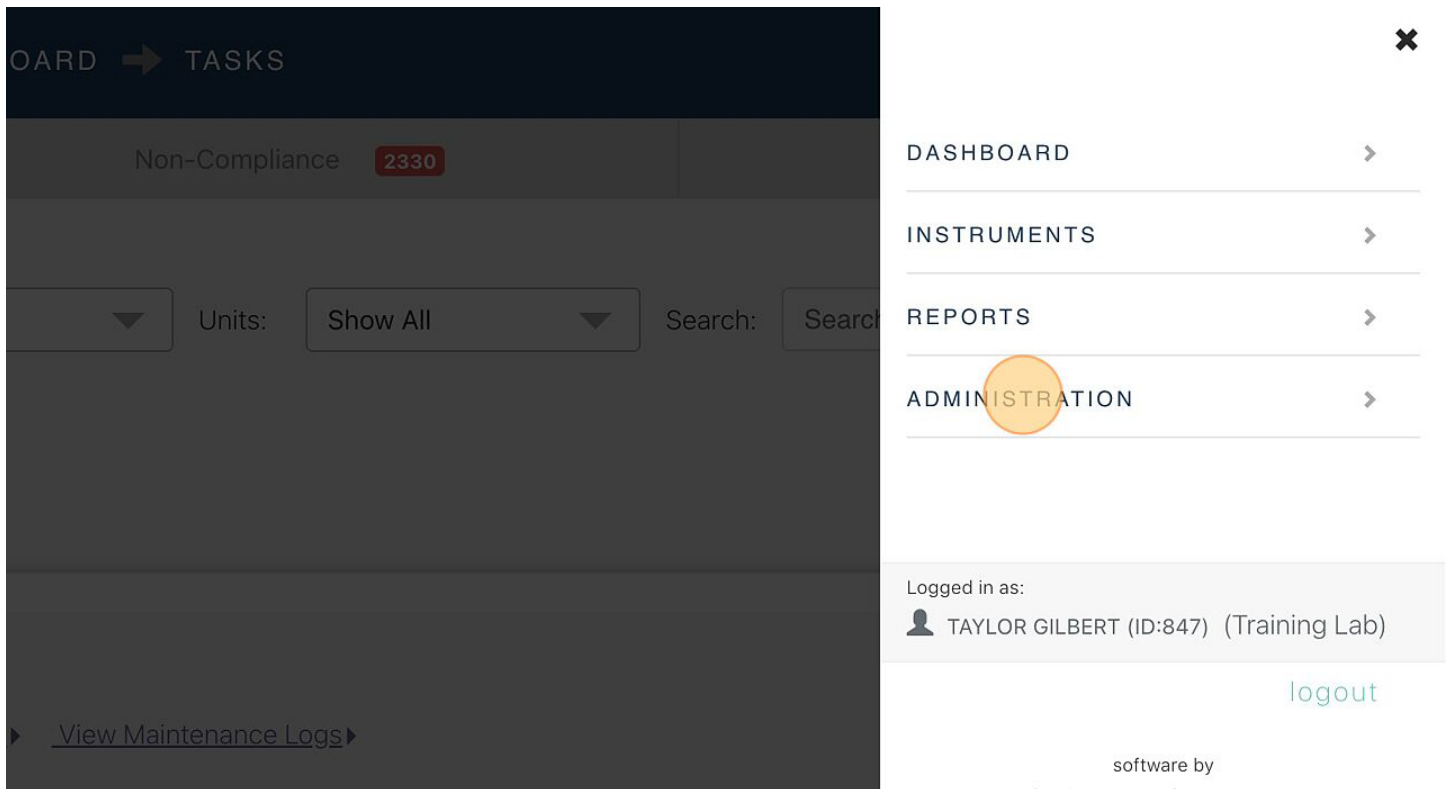
3. Select the Sites tab.

Sites	Departments & Units	Instruments

ⓘ Site Lists

Training Lab

Off Site Lab

4. Select the +Add Sites button

Scan Barcode ||||| ☰

Instruments	Users	System

+ Add Site

Last 90 Days (Compliance | 100%)

Last 90 Days (No data)

5. Enter Information.

6. Select Correct TimeZone

7. Select Save

Zip		12345					
Country		United States	⌄				
Phone		+1 ⌄		(123) 456-789(			
Timezone		America/New_York	⌄				

Logging Schedule ☑ Follow System Schedule

Su	Mo	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.

ADMIN ➡ SITES

Scan B

| Sites | Departments & Units | Instruments | Users |

ⓘ Site Lists

Training Lab .... Last 90 Days (Co
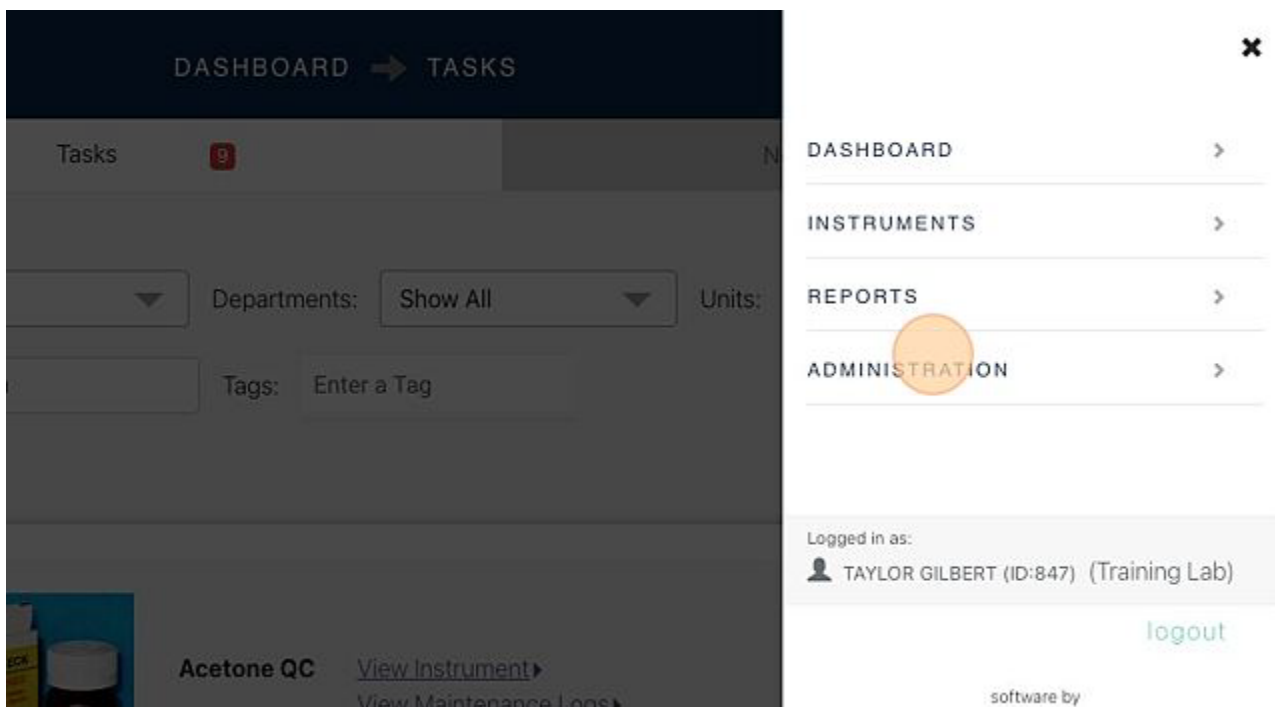
Off Site Lab .... Last 90 Days (
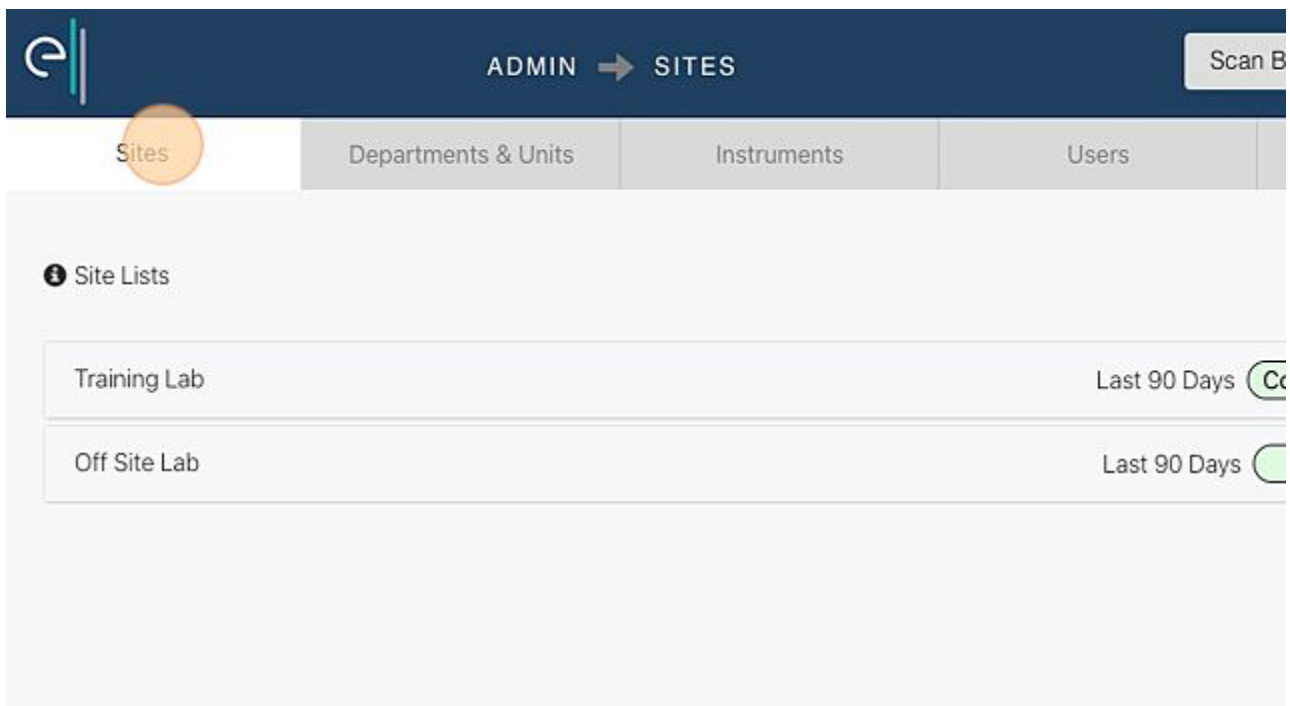
4. Choose the Site you want to modify.

ADMIN ➡ SITES

Scan B

| Sites | Departments & Units | Instruments | Users |

ⓘ Site Lists

Training Lab .... Last 90 Days (Co

Off Site Lab .... Last 90 Days (
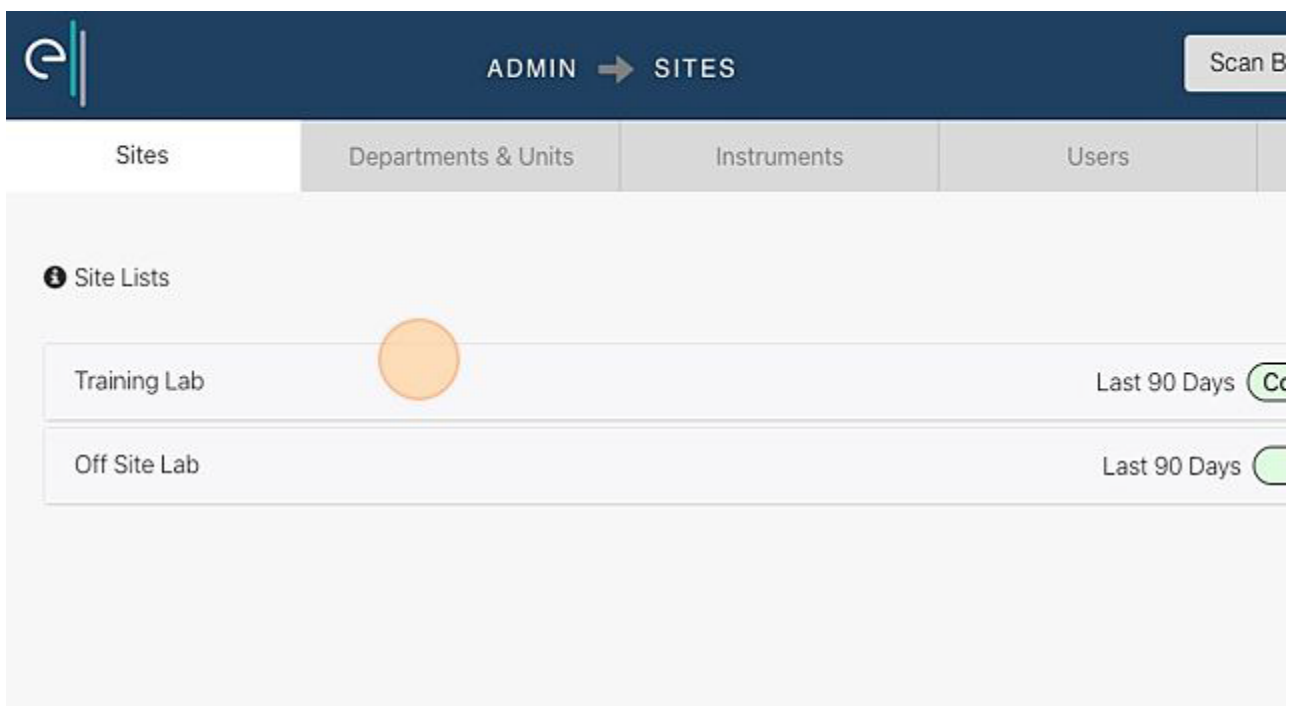
5. Click "(edit)" next to the site name.

6. Change the needed information.
7. Click Save

Add a New User

New users may only be added by administrators.

Steps to Add a New User:

1. Select "Administration" from the menu
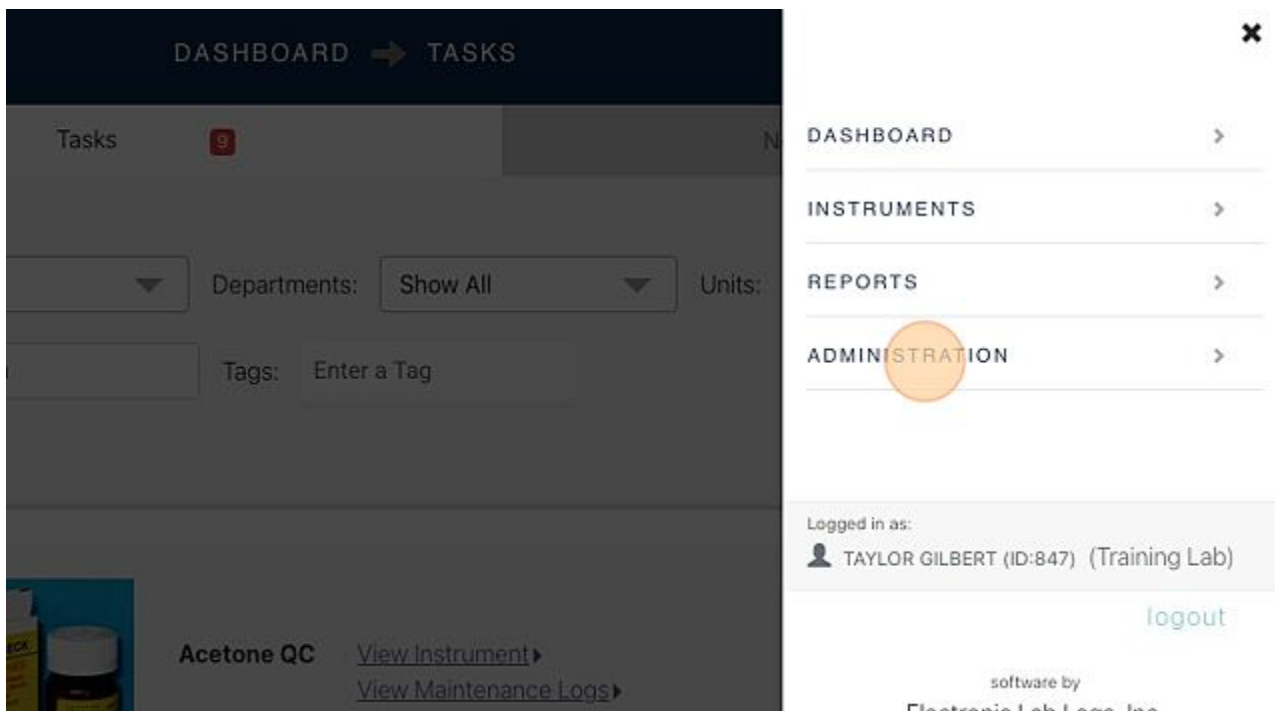
2. Select the "Users" tab
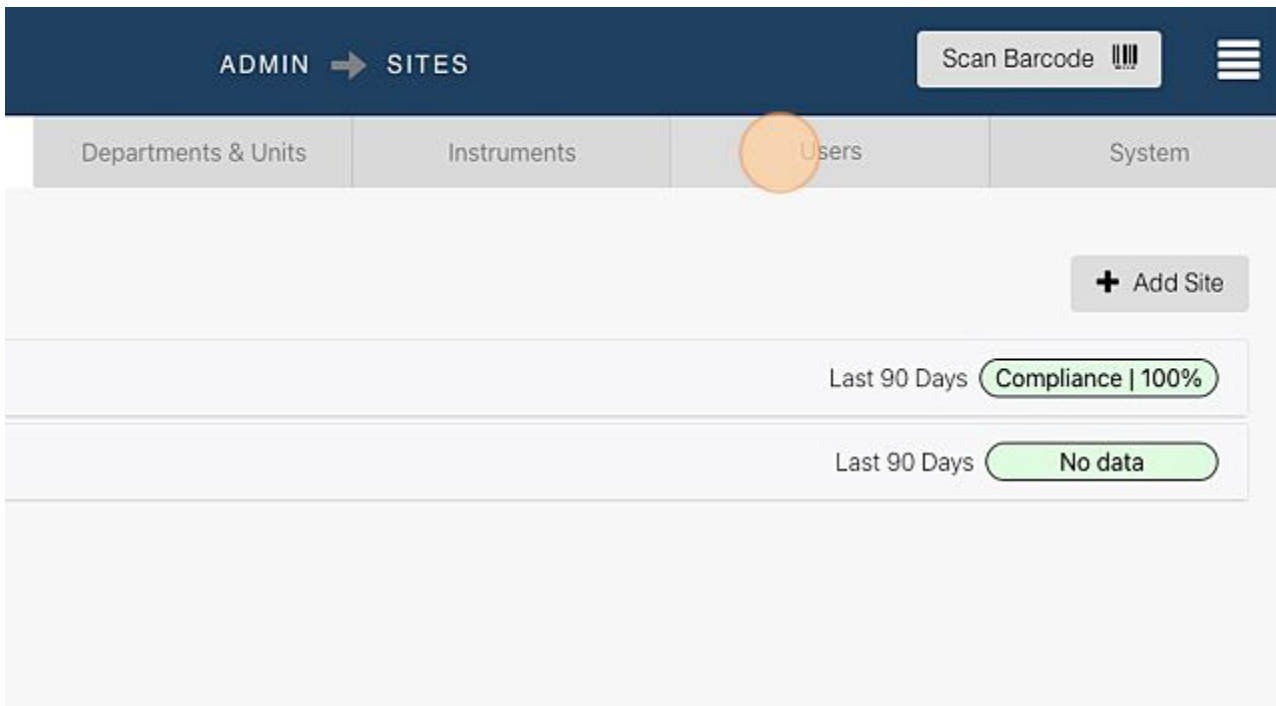
3. Select the "+ Add User" button
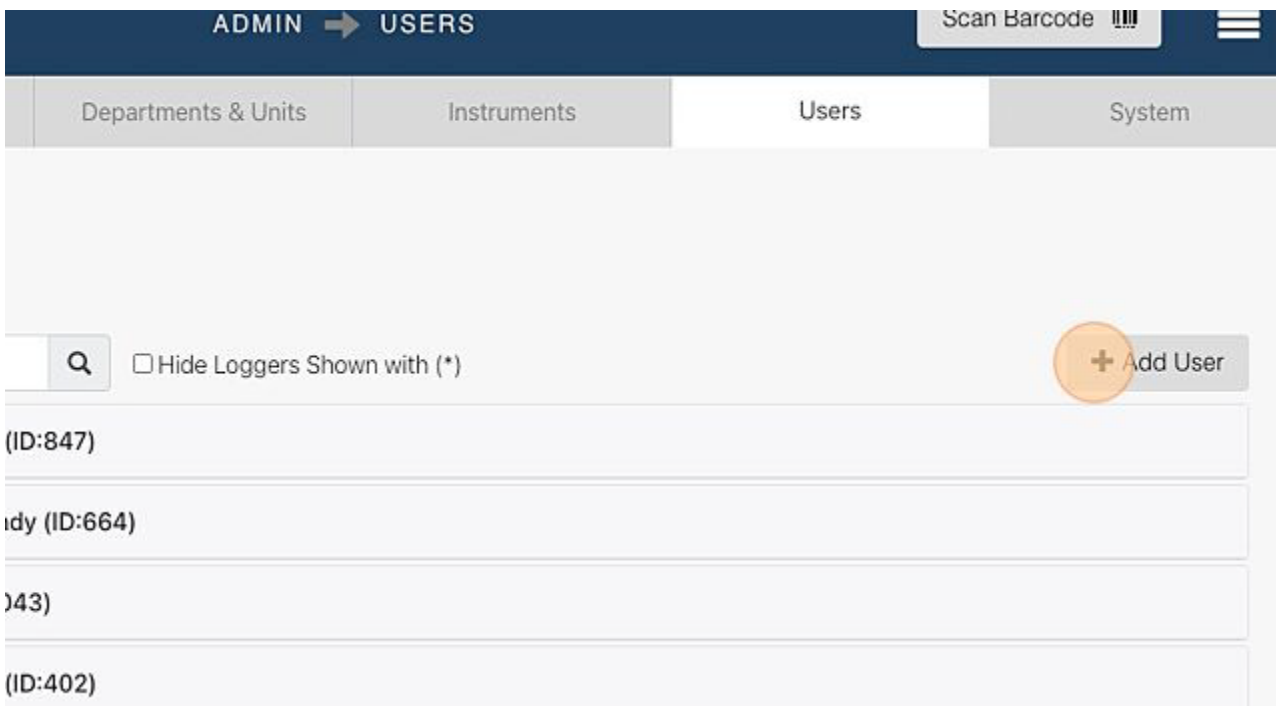
4. Enter user information and click Save. (First Name, Last Name, and Email Address are required.) A phone number is required to receive text notifications.

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

5. Complete the form by (√) the sites, departments and units the user needs. Leave anything the user should not have access to unchecked.

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

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.

8. Select "Save" when complete

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.
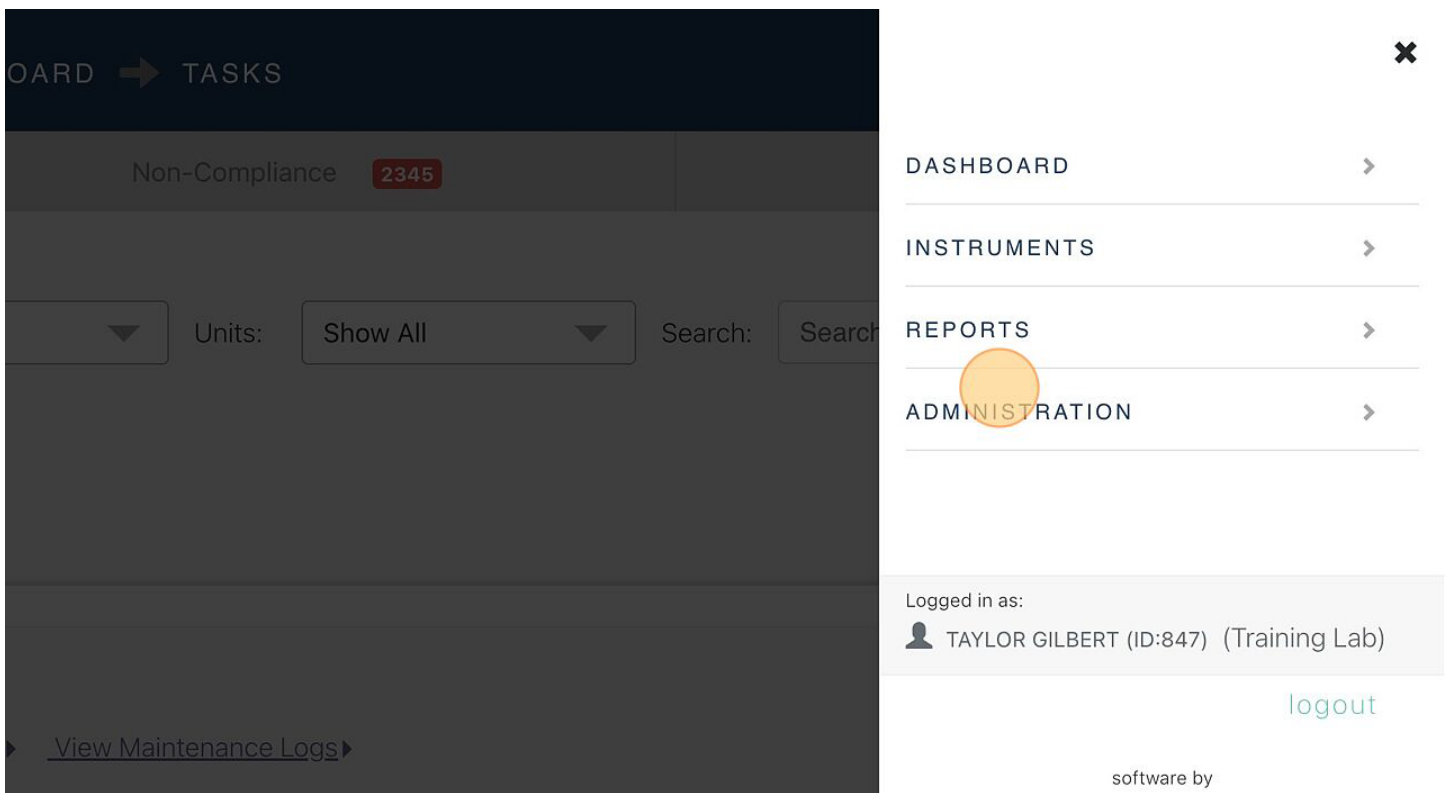
2. Click on the "Users" tab.

Scan Barcode ||||

| Instruments | Users | System |

+ Add Site

Last 90 Days (Compliance | 100%)

Last 90 Days (Compliance | 100%)

Last 90 Days (No data)

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

| Sites | Departments & Units | Instruments |

ℹ Users List   **4 Total**

[Search]   🔍   ☐ Hide Loggers Shown with (*)

👤 Gilbert, Taylor (ID:847)

👤 Strickland, Sandy (ID:664)

👤 test, test (ID:1043)

👤 Wilson, Joann (ID:402)

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

<< Return to List

Gilbert, Taylor (ID:847) (Edit)
Phone:
Title: Data Entry Specialist
Is Admin: Yes

taylor@lablogs.co (Edit)
Last Logon: Apr 19, 2023 14:09 UTC

Sites

Select the sites for Access

☑ All Sites
☑ Training Lab
☑ Off Site Lab
☑ Training Lab – Articles

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

Update User Email

Enter the New Email Address

A confirmation email will be send with an Activation Link

Current Email: **taylor@lablogs.co**

Taylor Gilbert

New Email: Email

Cancel   Update

9 UTC
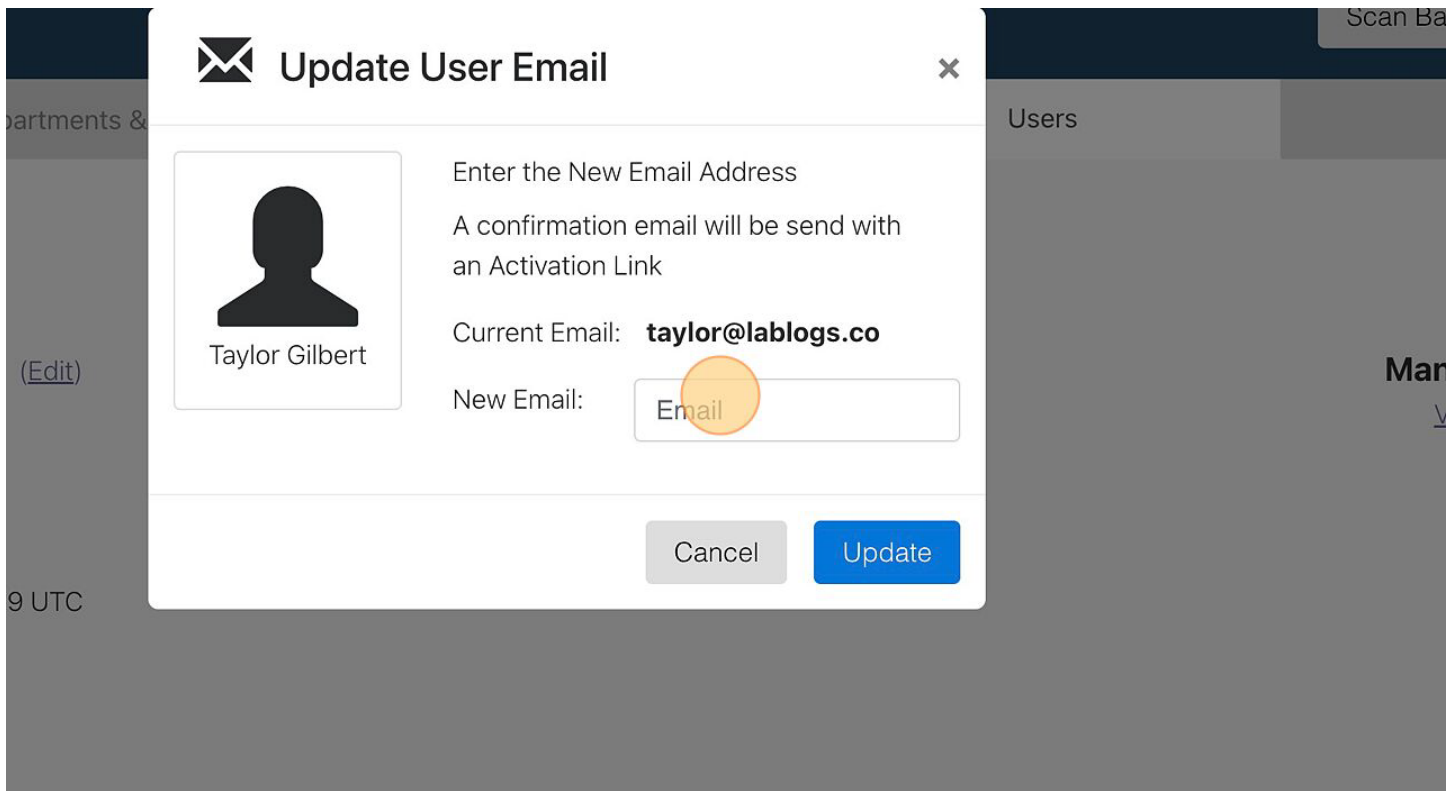
6. Select "Update" after new email is entered.

Enter the New Email Address

A confirmation email will be send with an Activation Link

Current Email: **taylor@lablogs.co**

Taylor Gilbert

New Email: Email

Manage Accou

View User Act

Reset Passw

Disable U

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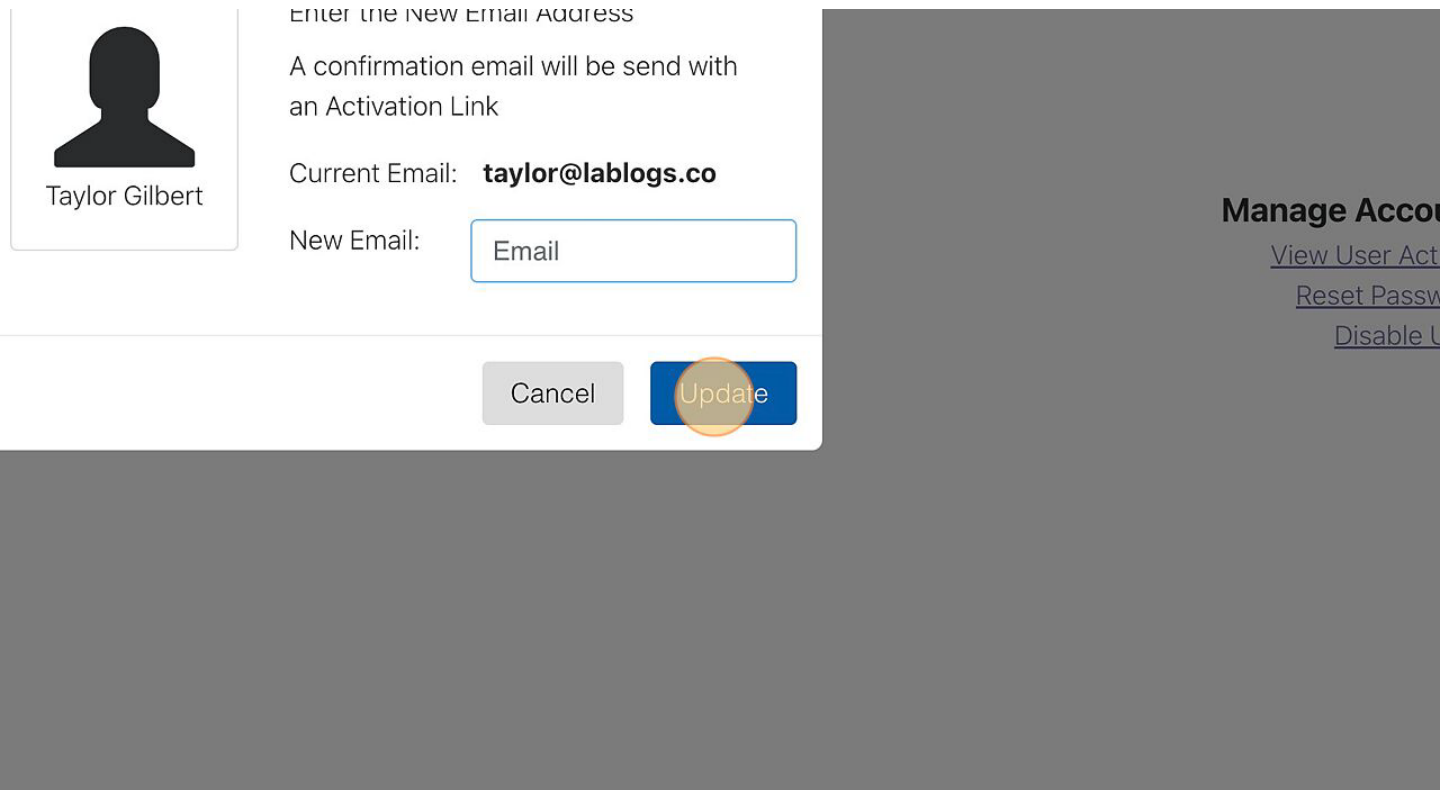
7. Once the new email address is entered, a confirmation message will be sent to the new email address, along with a verification code and a link.

Email Update ⅀ Inbox ×

no-reply@lablogs.co via 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: chad@lablogs.co
New email address: chadlhartz@gmail.com

To finish changing your email address, go to following link,
https://staging.lablogs.co/#//emailVerfication/?id=431&email=chad@lablogs.co&code=$2a$10$sIwxprUQEsJAs9Bwfm/ULuTz4/.l6a

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
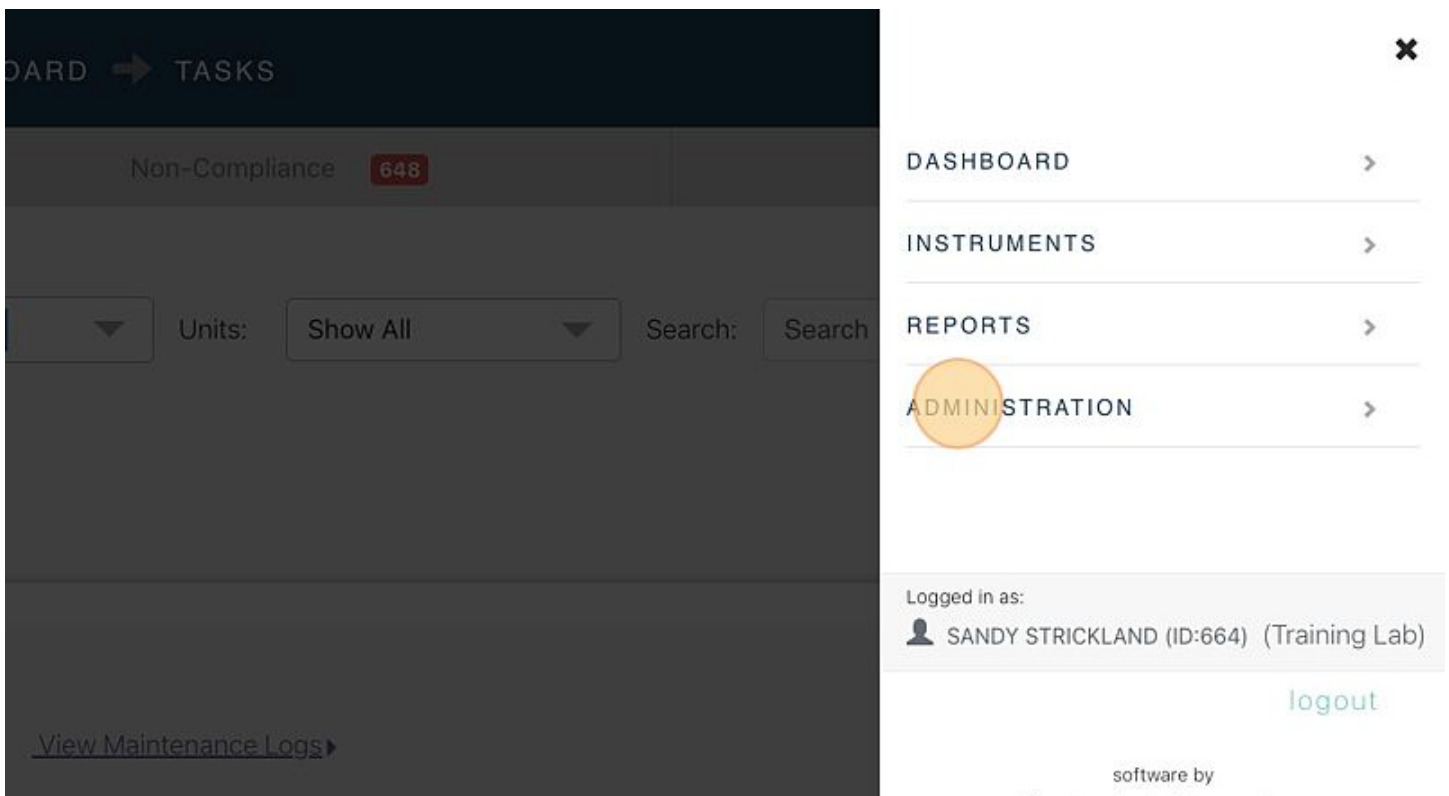
2. Select the "Users" tab

IN ➡ 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

ⓘ Users List   **4 Total**

| Search | 🔍 | ☐ Hide Loggers Shown with (*) |

👤 Gilbert, Taylor (ID:847)

👤 Strickland, Sandy (ID:664)

👤 test, test (ID:1043)

👤 Wilson, Joann (ID:402)

4. On the right of the page, under Manage Account, select "View User Activity"
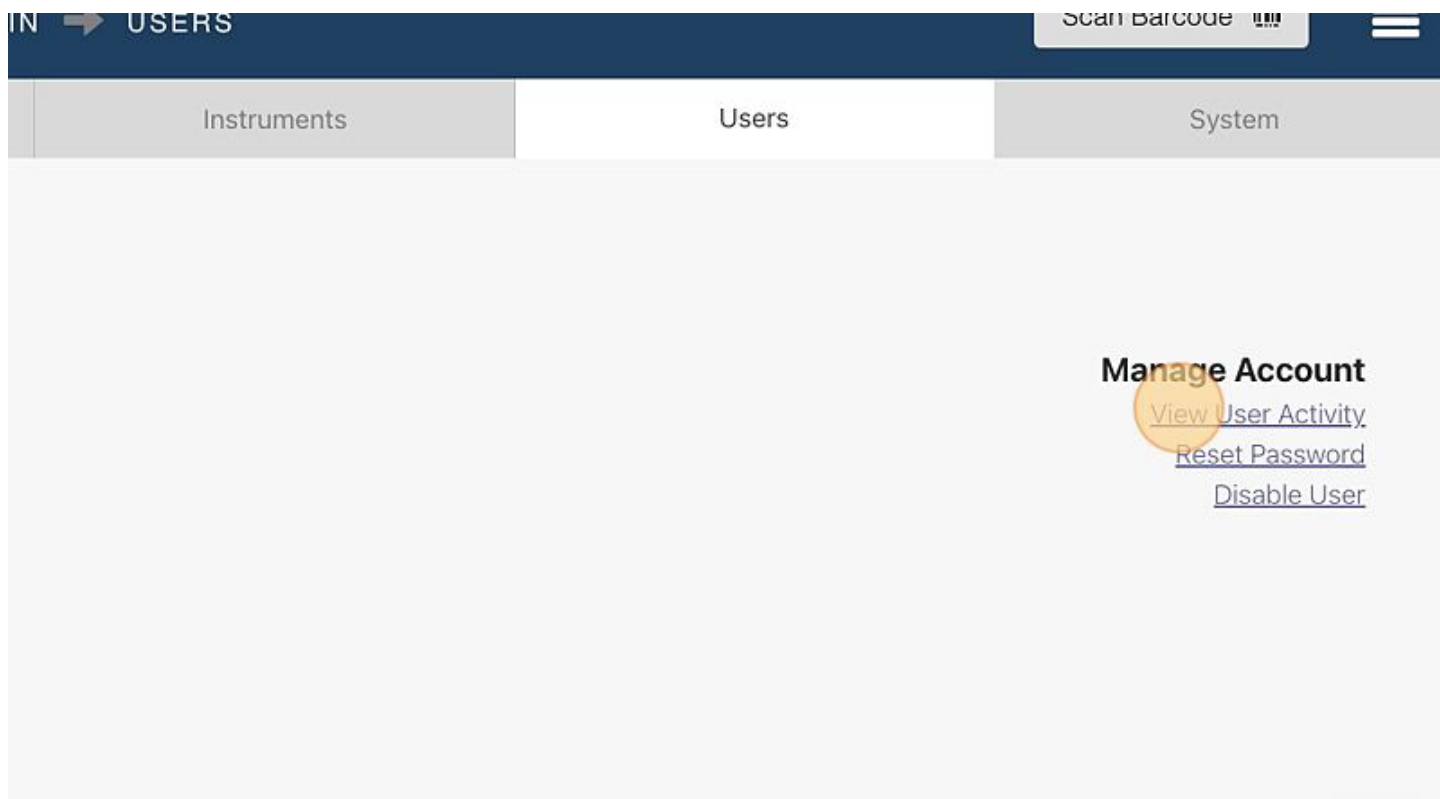
You may also view the same under Reports.

Steps to View User Activity under Reports:

1. Select "Reports" from the menu

DASHBOARD >

INSTRUMENTS >

REPORTS >

ADMINISTRATION >

Logged in as:
👤 SANDY STRICKLAND (ID:664) (Training Lab)

logout

software by
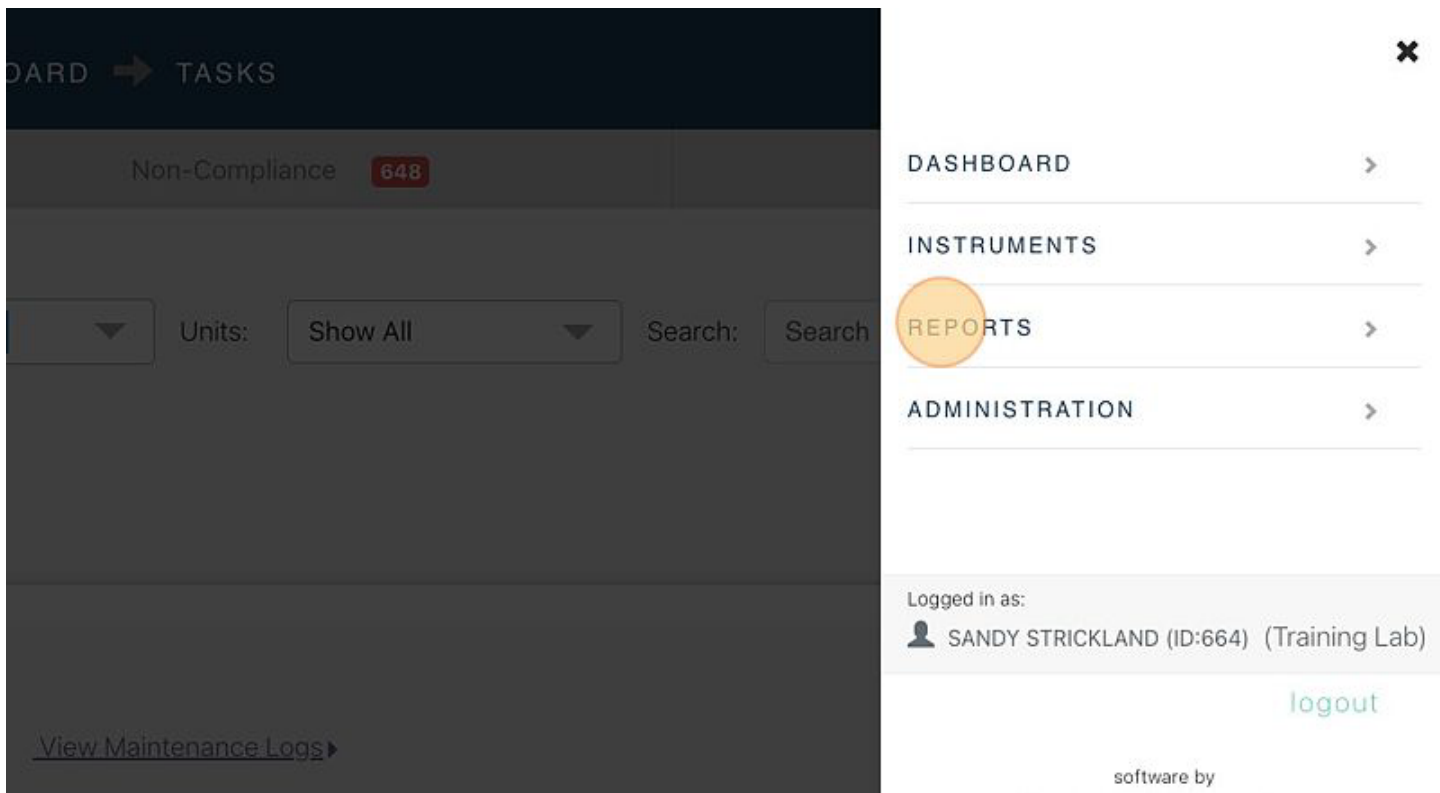
2. Select "Users" on the left of the page

Maintenance Logs

Sites

Departments

Benches / Units

Instruments

Users

Compliance Reviews

Deleted History

Sites: Show All ⌄   Departments: Show All

ℹ️ 🔘 Showing Reports in Your Queue

No Monthly Reports to sign in your queue.
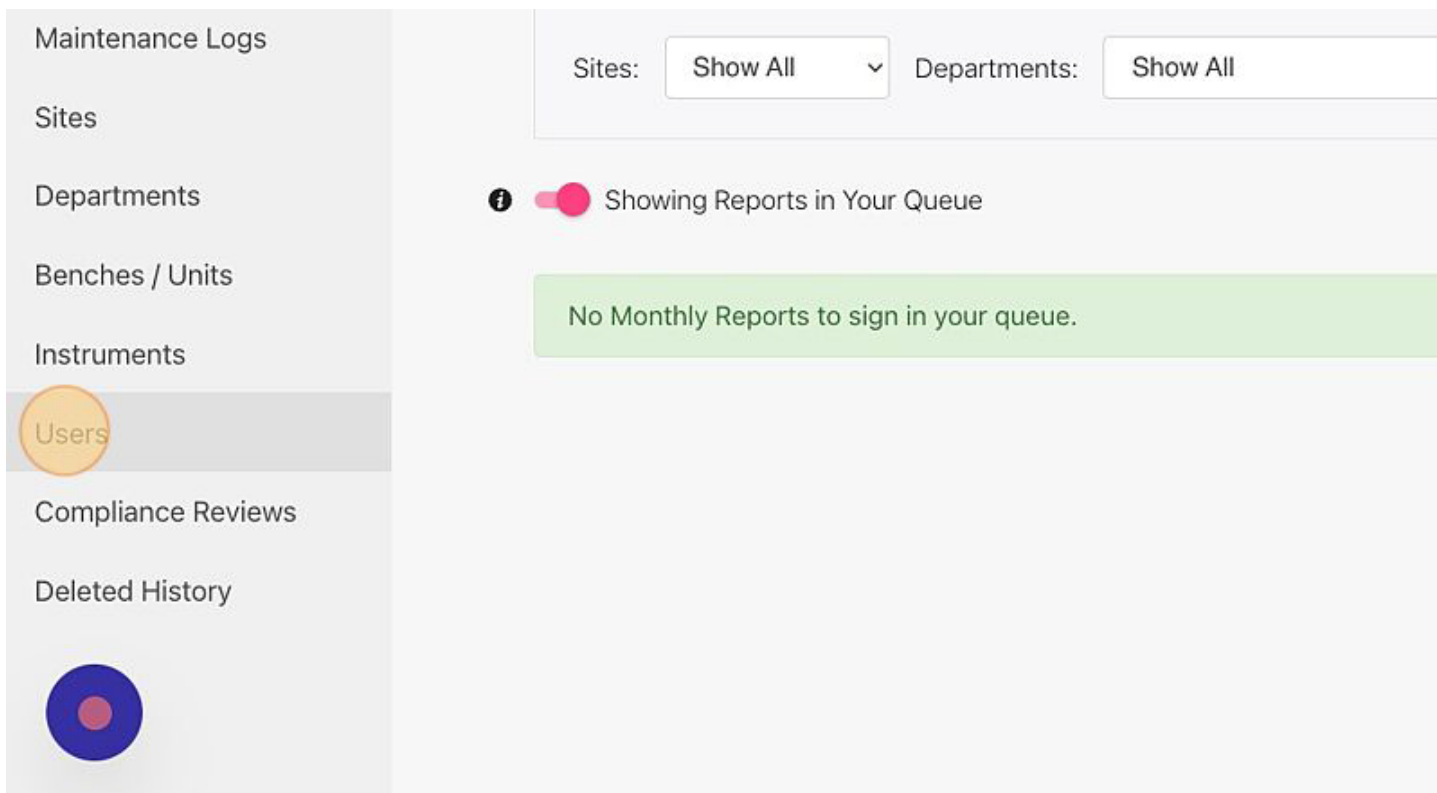
3. Use the filters to view the desired information

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
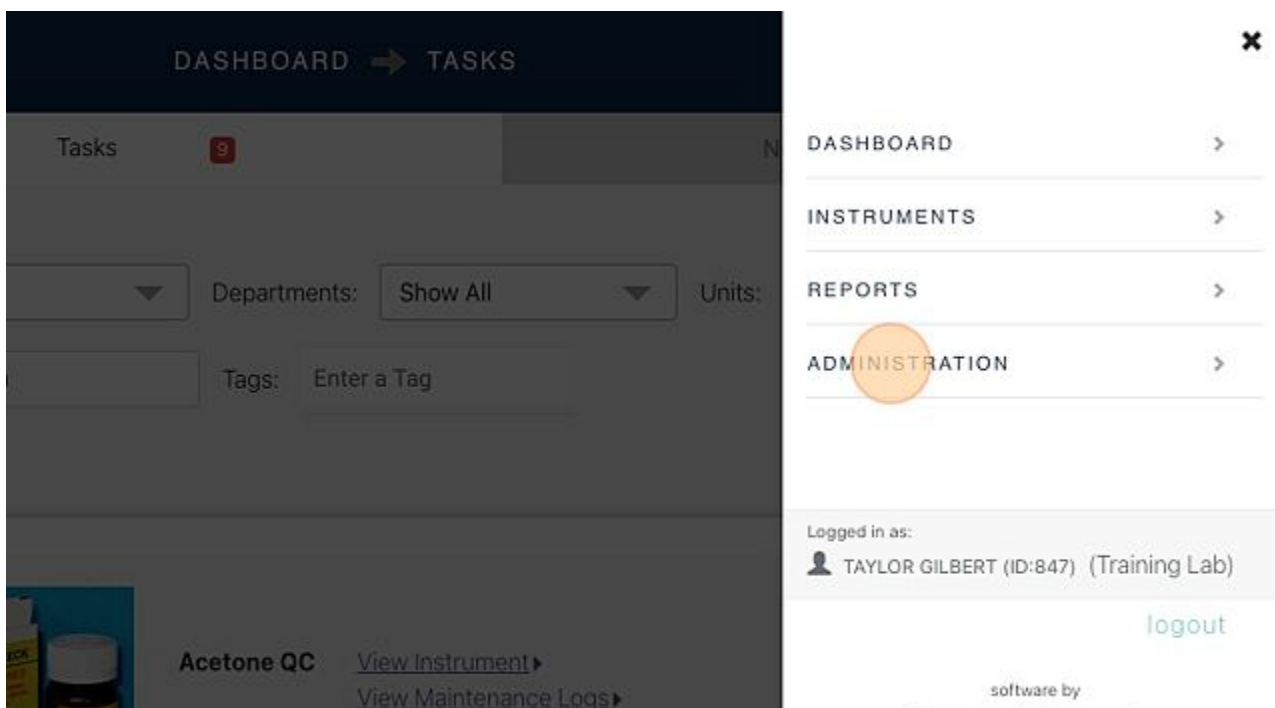
2. Select the "Users" tab

ADMIN ➡ SITES		Scan Barcode ‖‖‖	☰

Departments & Units	Instruments	Users	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

ℹ Users List   **4 Total**

Search	🔍	☐ Hide Loggers Shown with (*)

👤 Gilber, Taylor (ID:847)

👤 Strickland, Sandy (ID:664)

👤 test, test (ID:1043)

👤 Wilson, Joann (ID:402)

4. Make the changes

5. Select "Save" when complete

Disable User

This may only be completed by an administrator.

Steps to Disable a User:
1. Select "Administration" from the menu
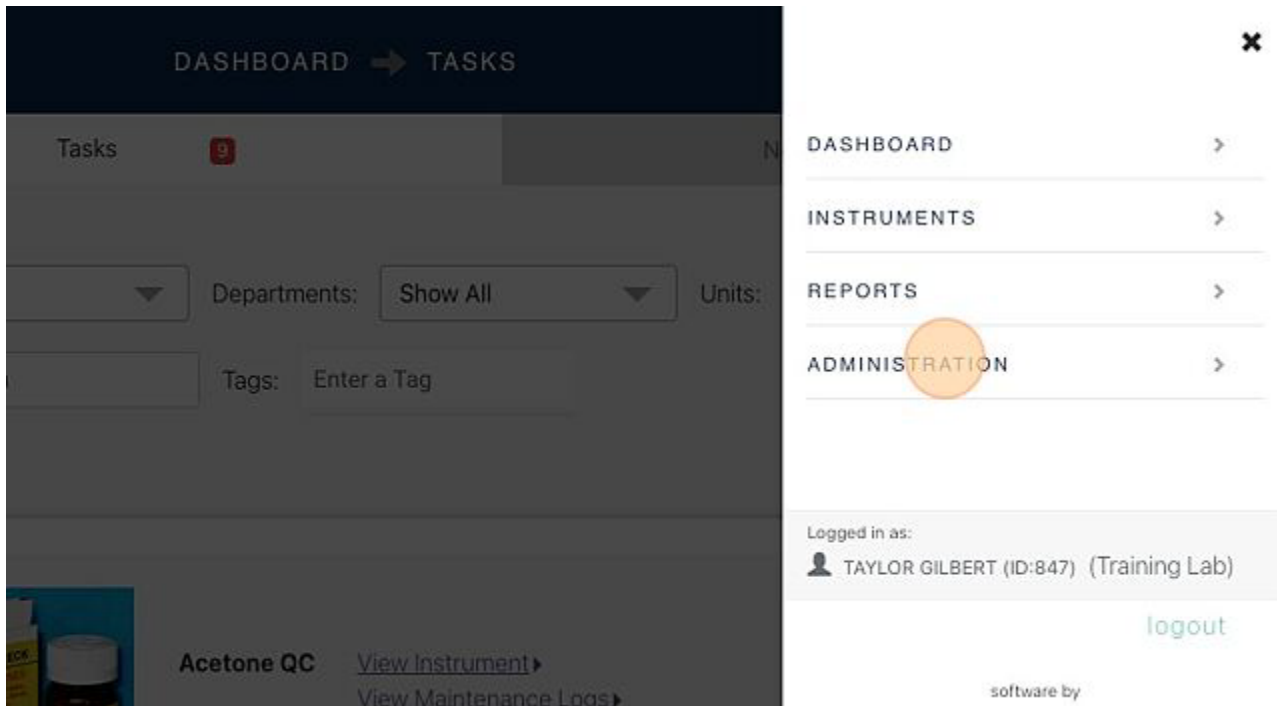
2. Select the "Users" tab

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 🔍 ☐ Hide Loggers Shown with (*)

👤 Gilbert, Taylor (ID:847)

👤 Strickland, Sandy (ID:664)

👤 test, test (ID:1043)

👤 Wilson, Joann (ID:402)

4. On the right of the page under Manage Account, select "Disable User"
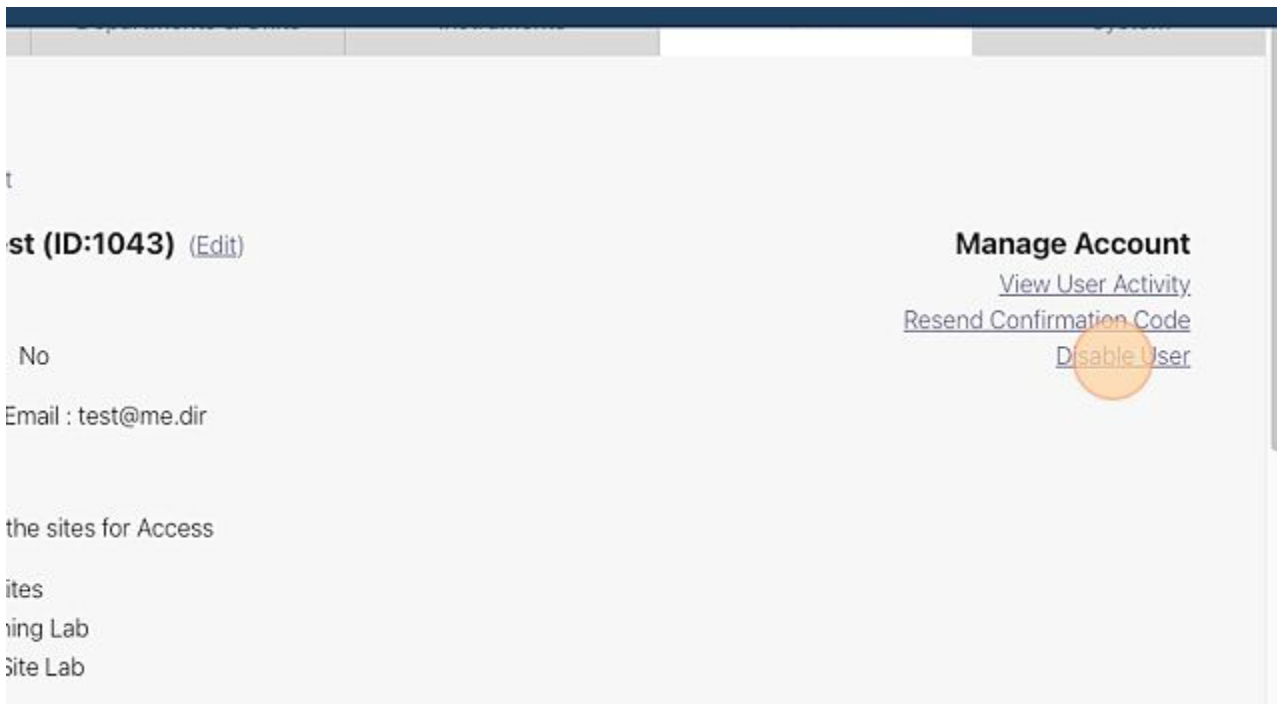
5. Select "Yes" to complete your action
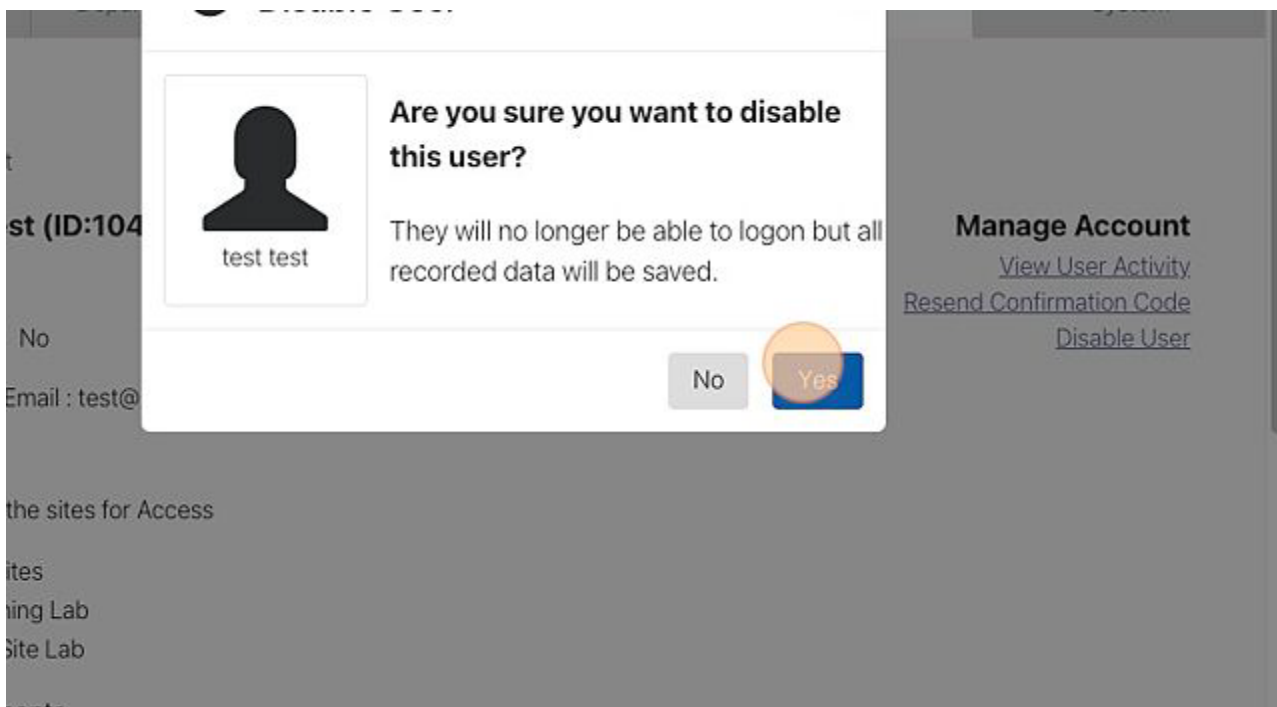
Add a New Department

This may only be done by administration

Steps to Add a New Department
1. Select "Administration" from the menu
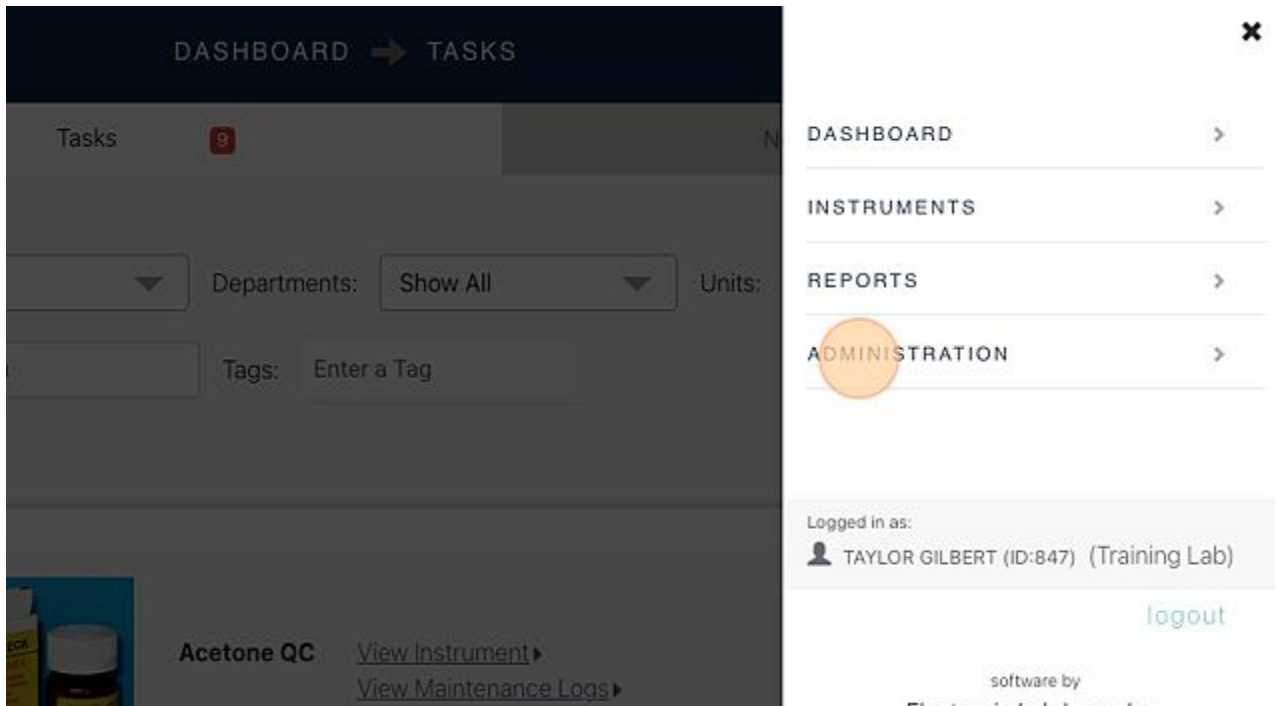
2. Select the "Departments & Units" tab
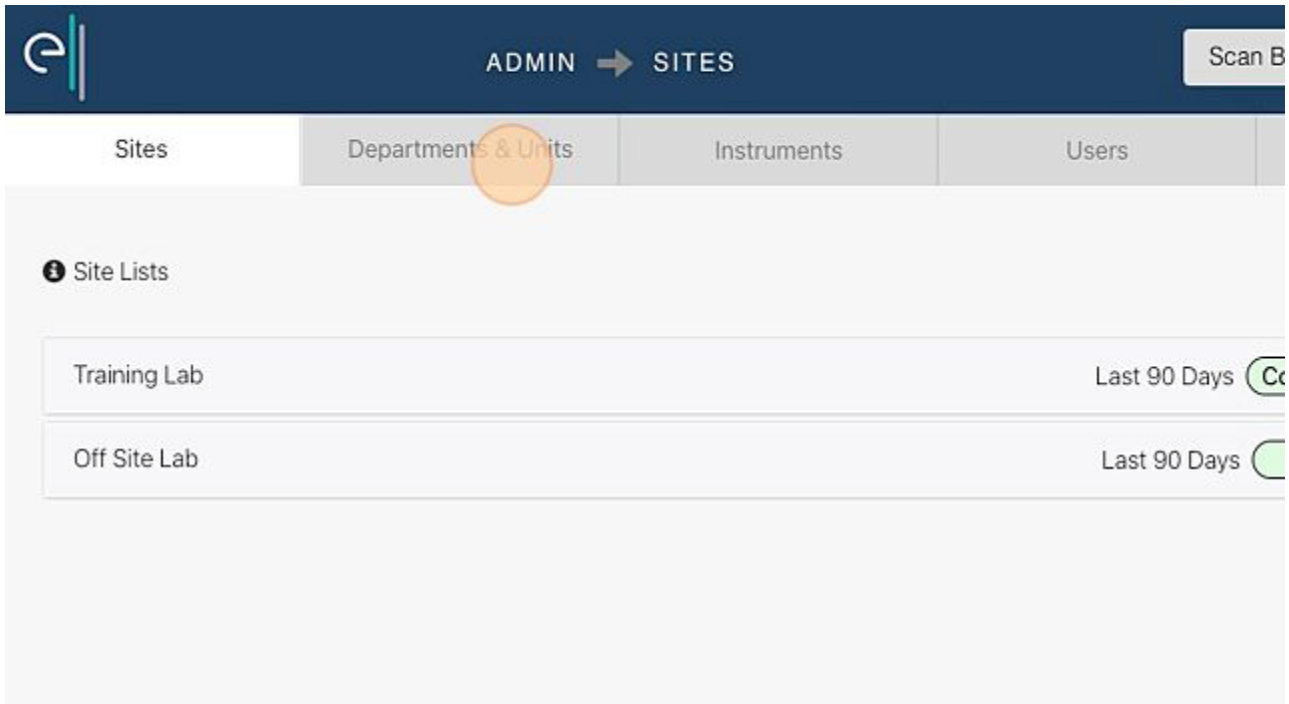
3. On the right select the "+ Add Department" button
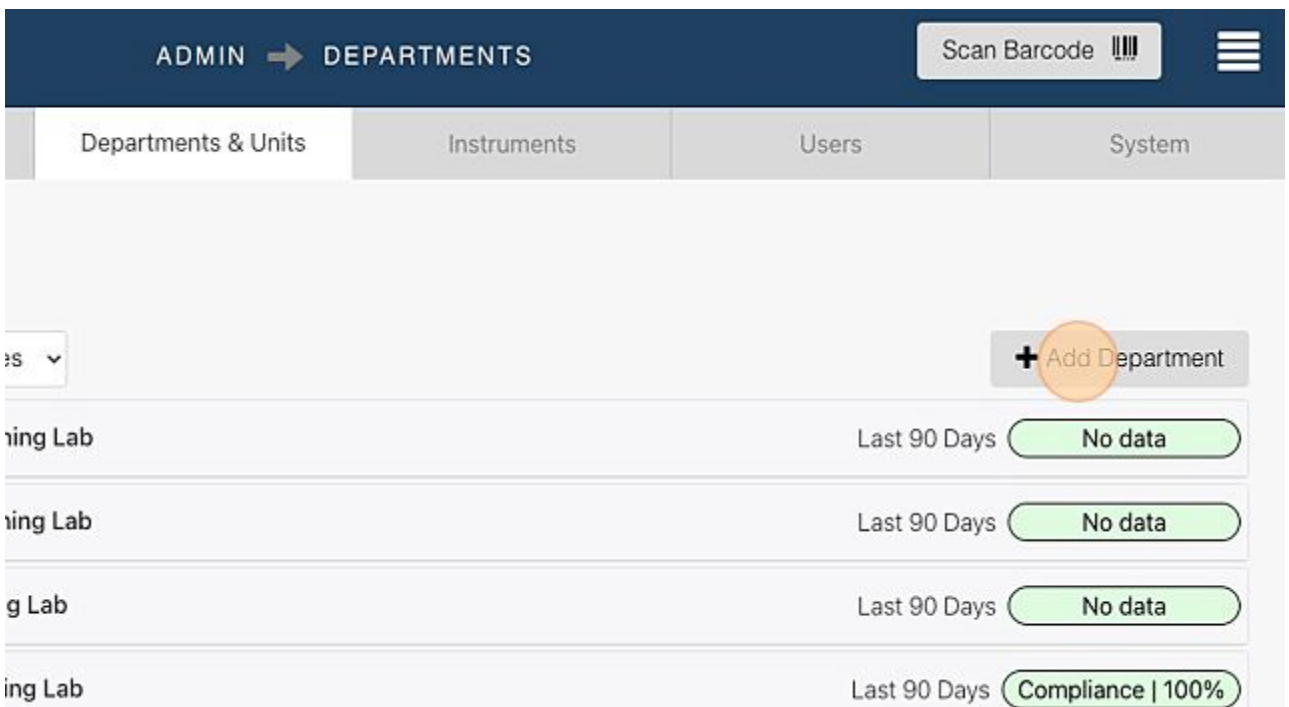
4. Complete the form

Add Department

＋	Department Name	Department Name
	Site	Training Lab

Benches / Units (1)

1. Bench / Unit Name — Enter Bench / Unit Nam

5. Select "Finish" when you are done

Track Instrument Usage ☐

Logging Schedule ☑ Follow Site Schedule

Su	Mo	Tu	We	Th	Fr	Sa
ON	ON	ON	ON	ON	ON	ON

＋ Add Bench / 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
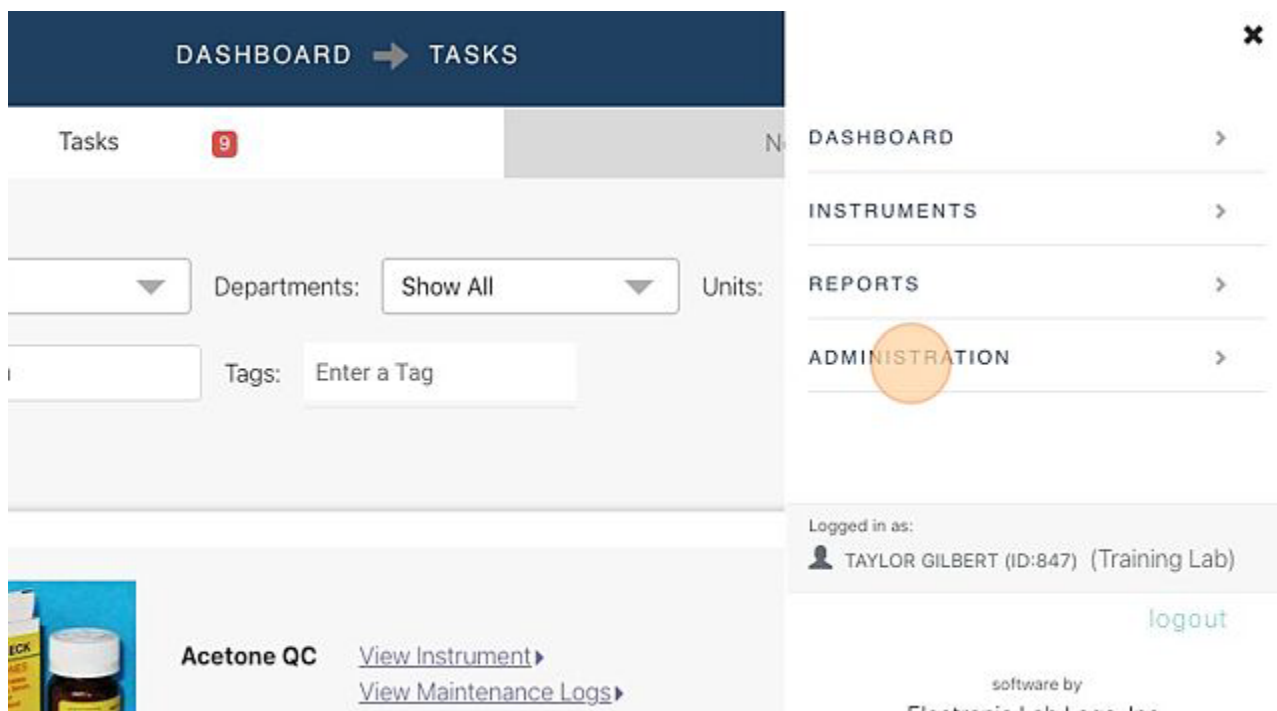
2. Select the "Departments & Units" tab

Site Lists

Training Lab	Last 90 Days
Off Site Lab	Last 90 Days

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

Department Lists

Sites: Show All Sites ▾

Hematology- Training Lab

Coagulation- Training Lab

Urinalysis- Training Lab

Blood Bank- Training Lab

Microbiology- Training Lab

Point of Care- Training Lab

Chemistry- Training Lab

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

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

6. Fill out the necessary information

7. Select "Finish" when complete

Edit a Department, Bench, or Unit

This may only be completed by administration

Steps to Edit a Department:

1. Select "Administration" from the menu

2. Select the "Departments & Units" tab

3. Select the Department you need to edit

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

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
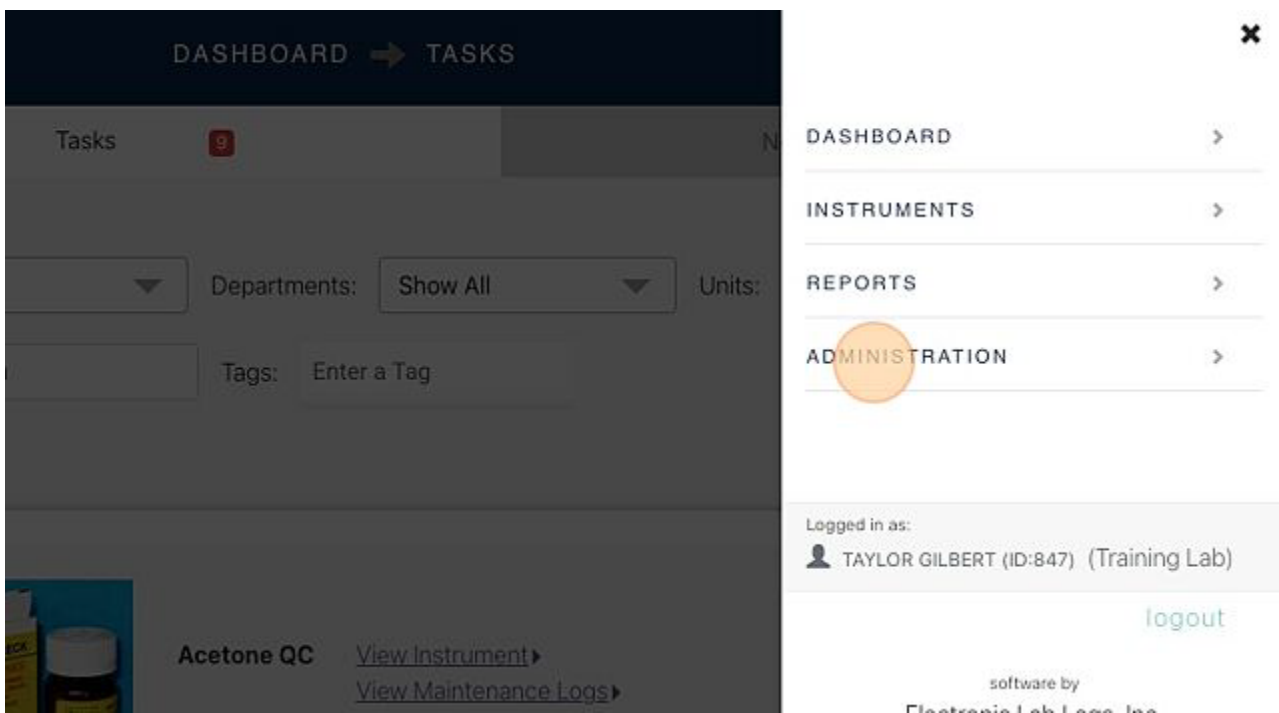
3. Select the "Departments & Units tab
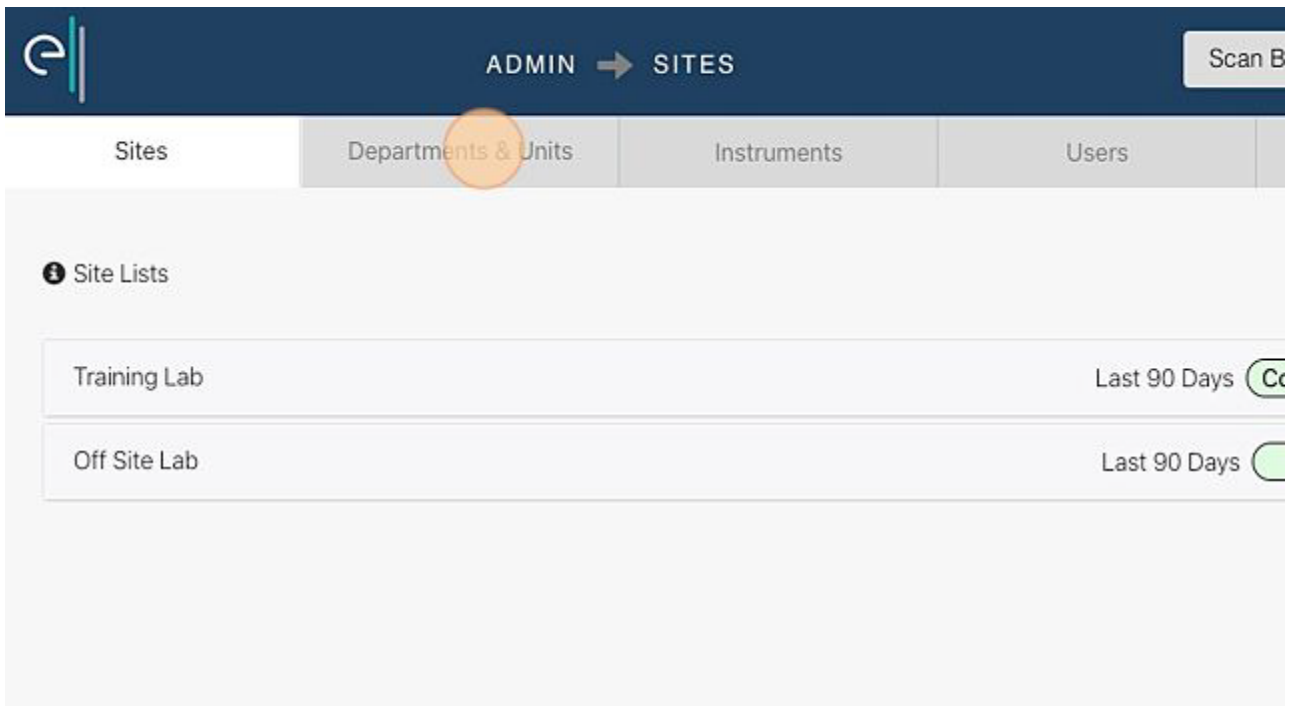
4. Select the department-site you need to edit
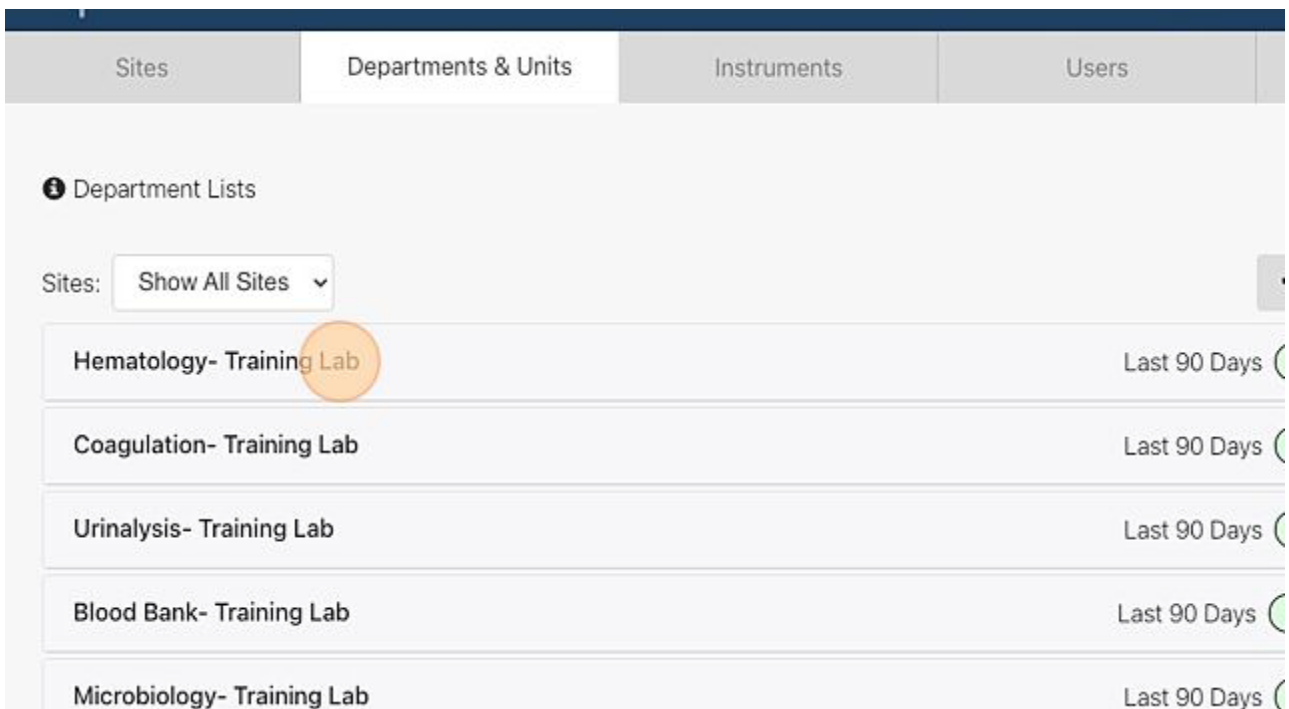
5. Below the list of department benches you will find the current Sign-Off Chain
6. Select the "Edit" button next to this list

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

Sign-off Chain: (Edit)

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**

👤 Add User

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 Chain

User Name

jo

Joann Wilson (ID:402)

Cancel   Add

10. Select "Add"

User Name

Joann Wilson (ID:402)

Joann Wilson (ID:402)
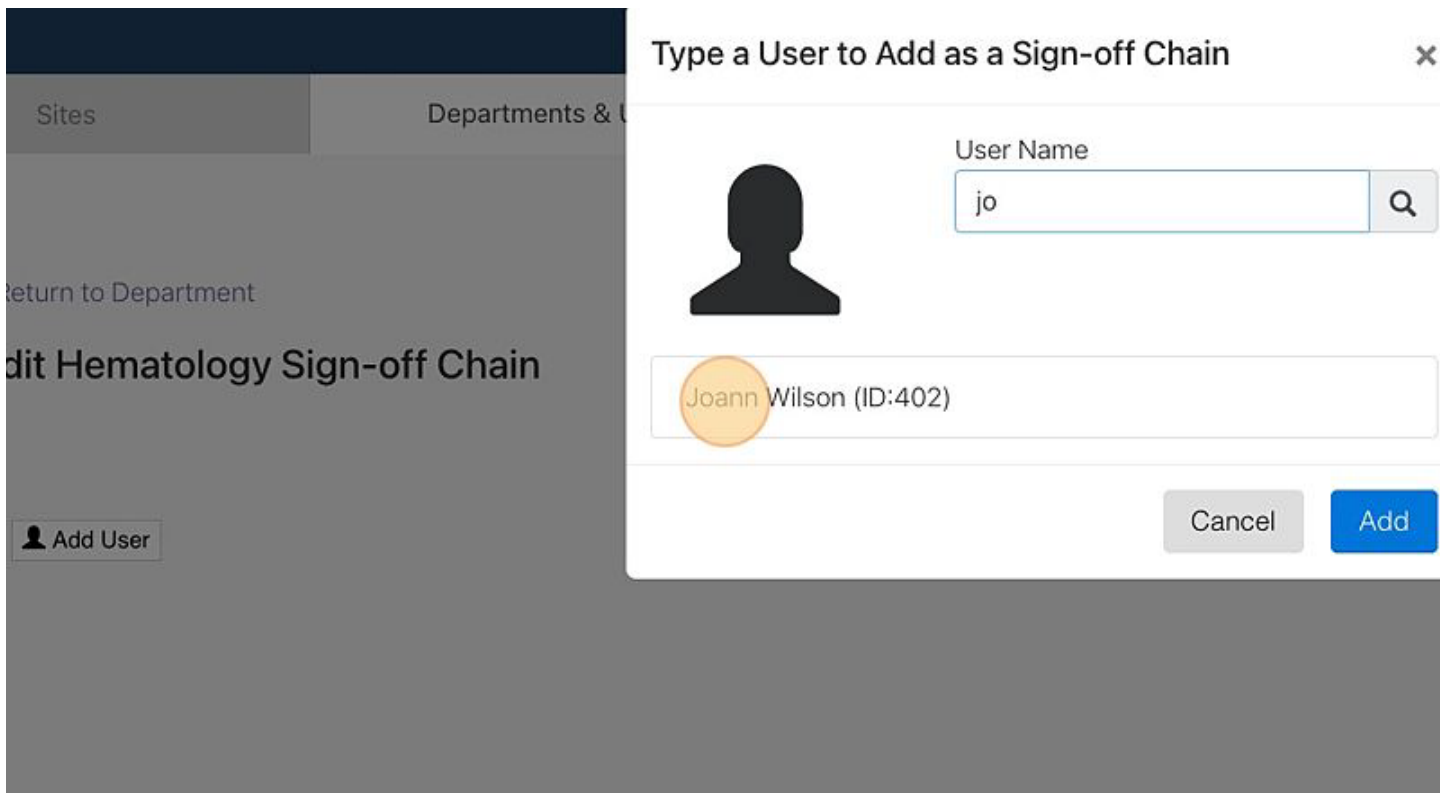
Cancel   Add
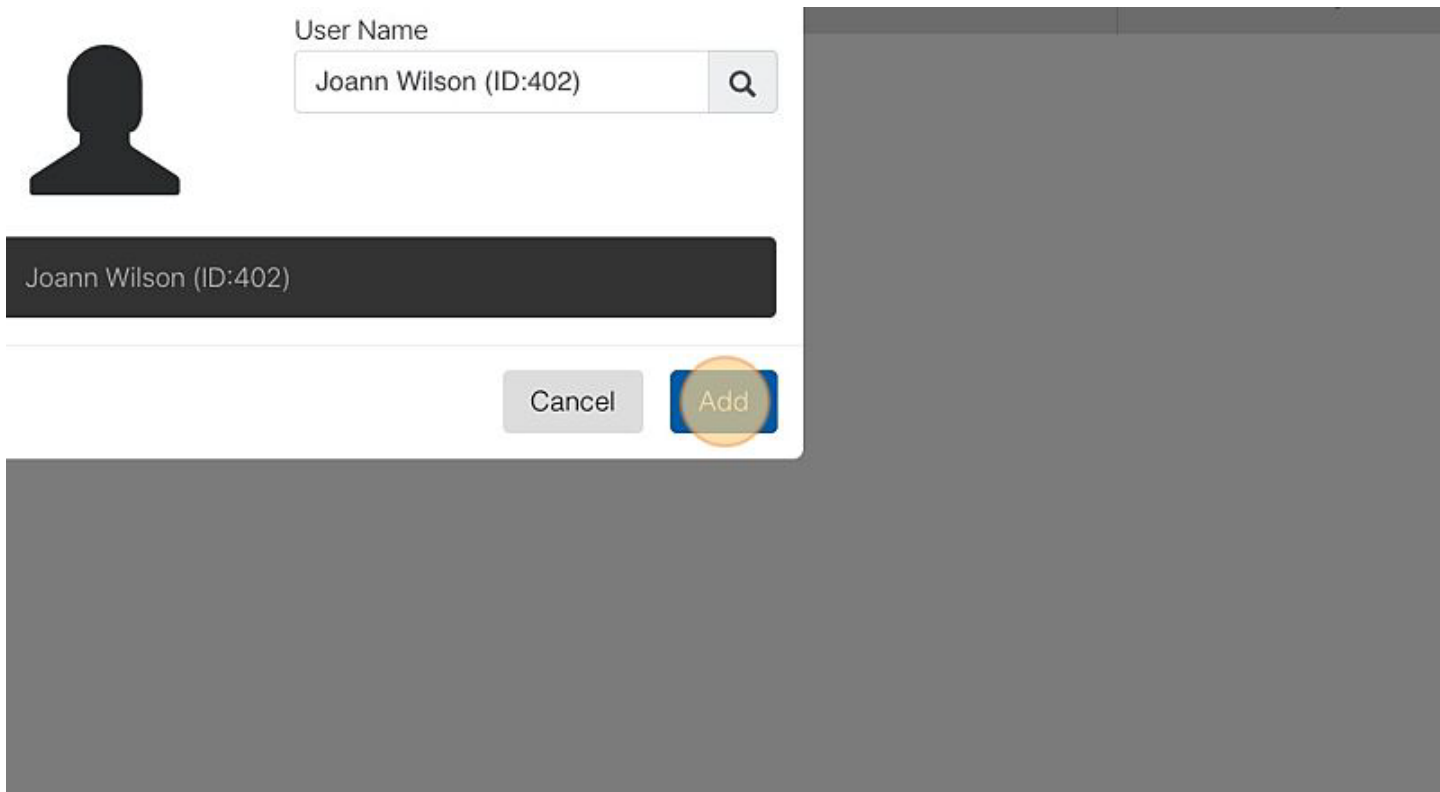
11. You will now have the "Add Optional" button. Select this if your would like it to be optional for 1 of 2 selected users to sign-off.
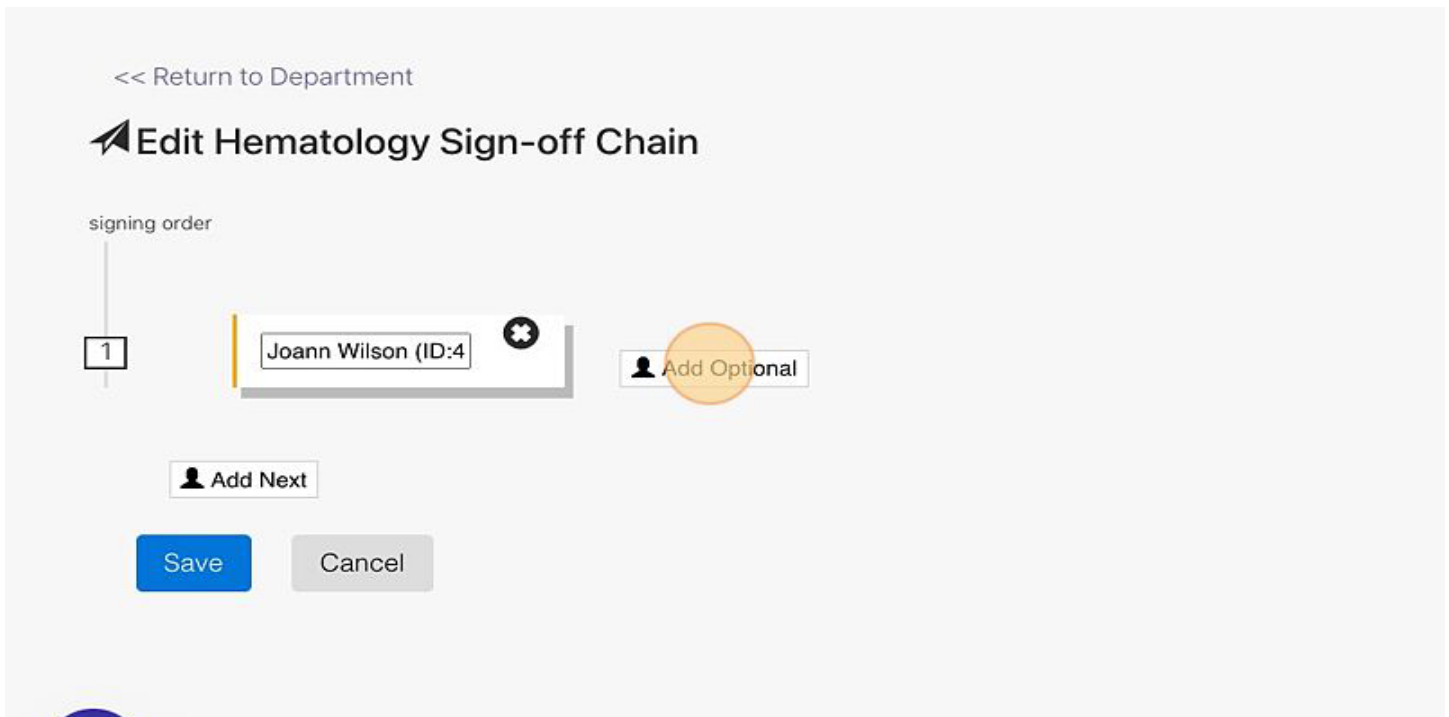
12. Select "Add Next" to add another user to be required to sign-off
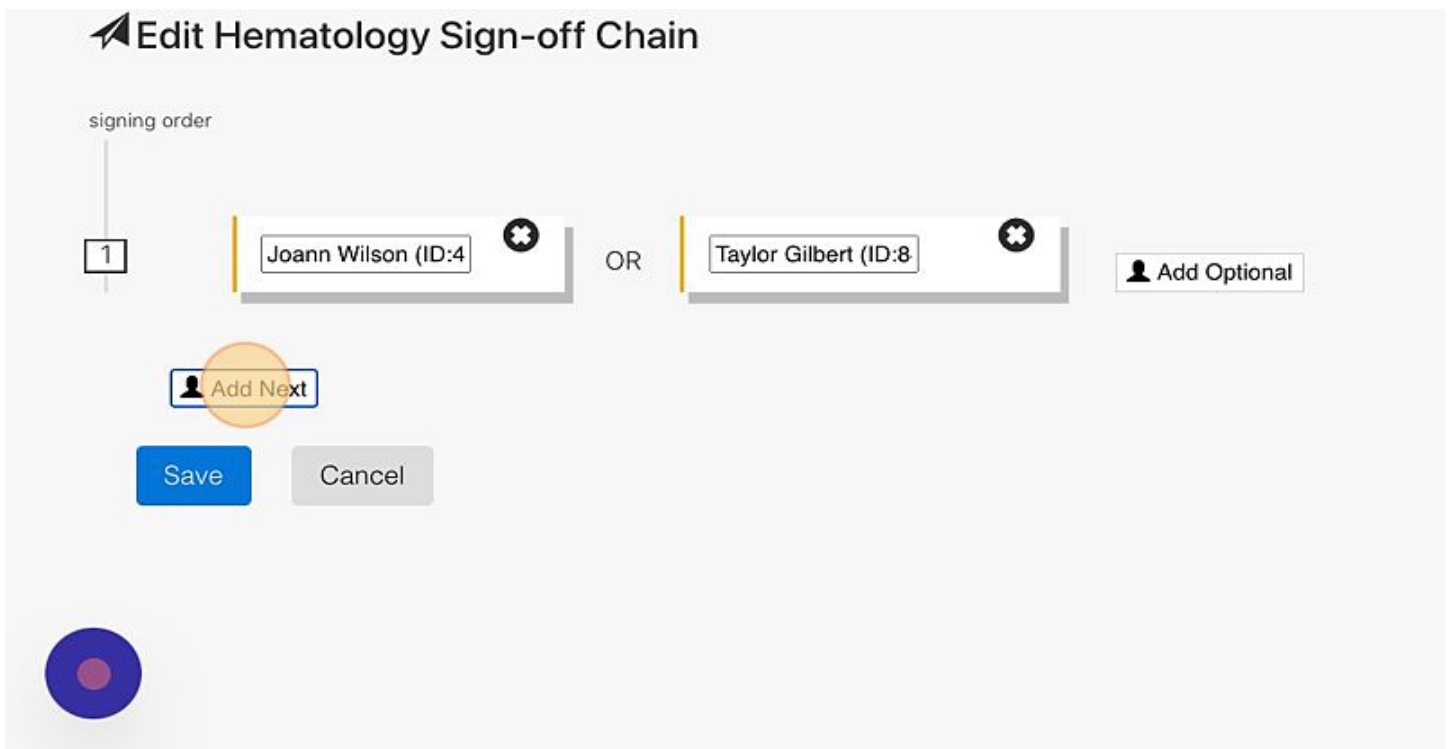
13. You may then need to change the order of the list, use the numbered boxes (drag and drop) to put the list in the correct order (#1 will be the first to sign the report)

14. Select "Save"

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

2. Select the "Instruments" tab

ADMIN ➡ SITES

Scan Barcode ▐▌▌▌

Sites	Departments & Units	Instruments	Users	Syst

Site Lists

＋ Ad

Training Lab   Last 90 Days (Compliance | 10

Off Site Lab   Last 90 Days (No data

3. Select "+ Add Instrument Type"

Lists

Search   Sites: Show All ▼   Departments: Show All ▼

Show All ▼

＋ Add Instrument Type

Inform II QC   Instruments : 1   Last 90 Days (No data   )

                      Instruments : 1   Last 90 Days (Compliance | 100%)

                      Instruments : 1   Last 90 Days (No data   )

                      Instruments : 1   Last 90 Days (No data   )
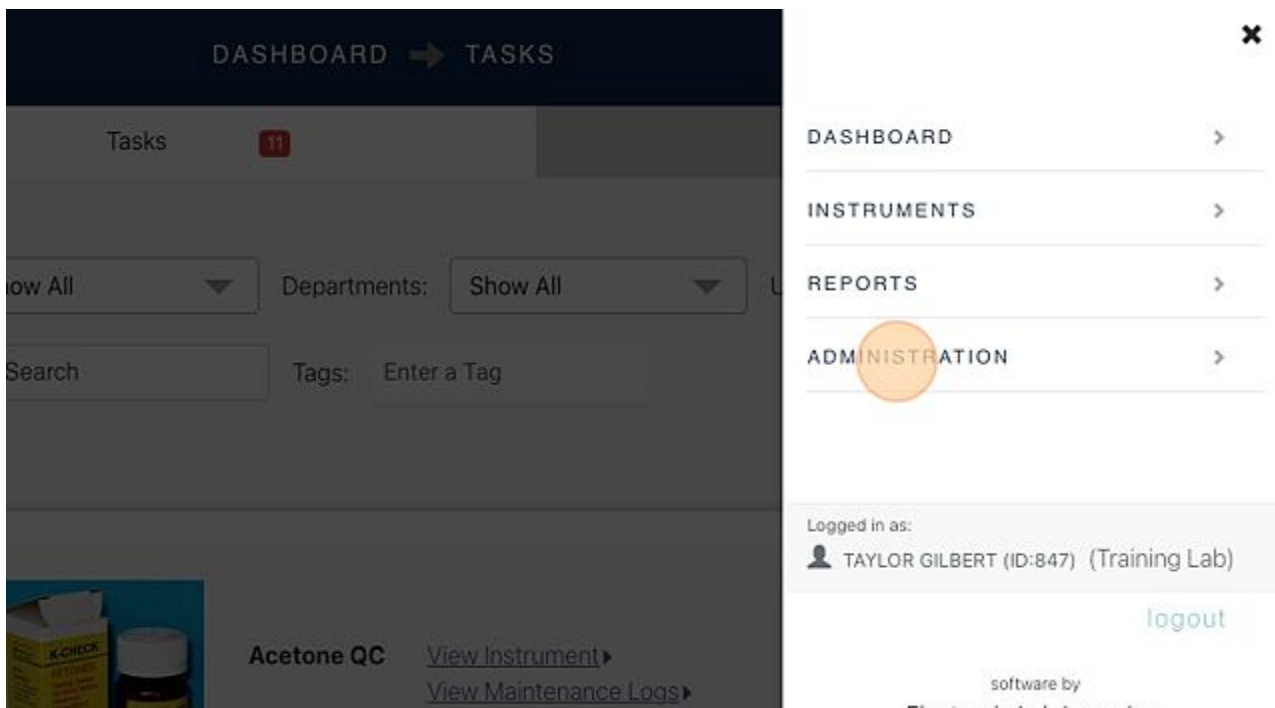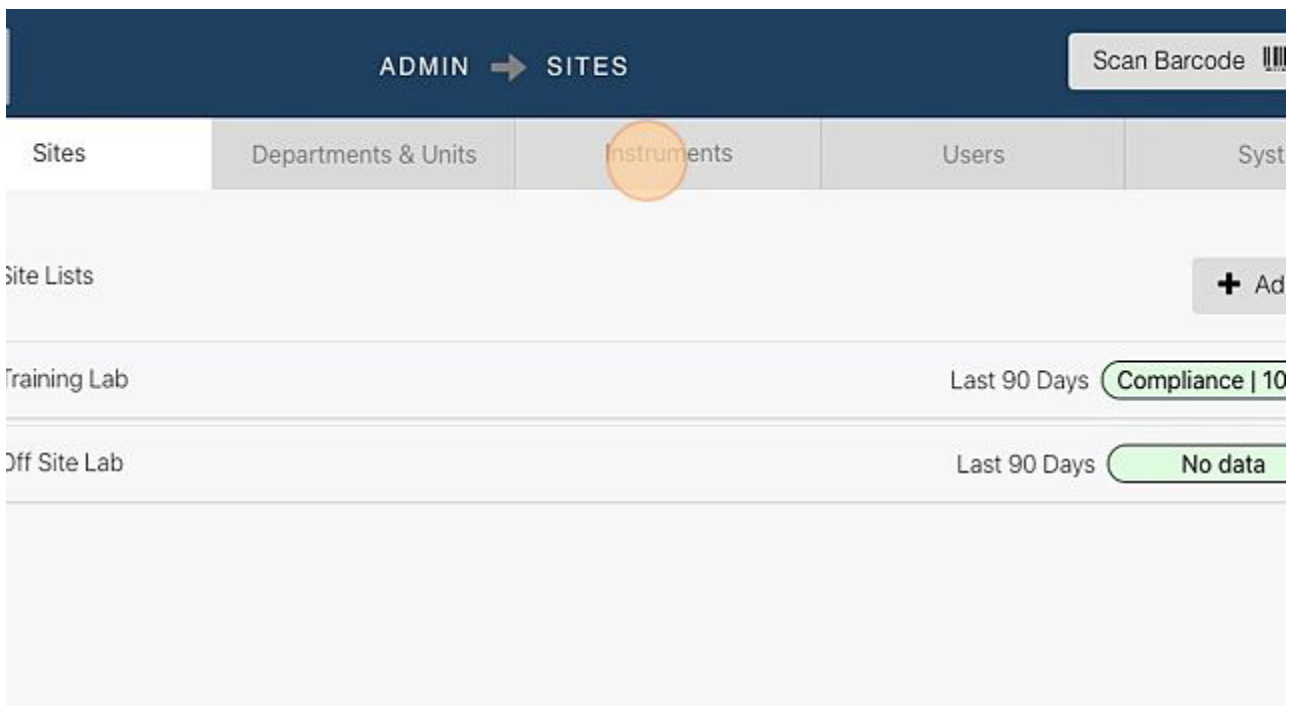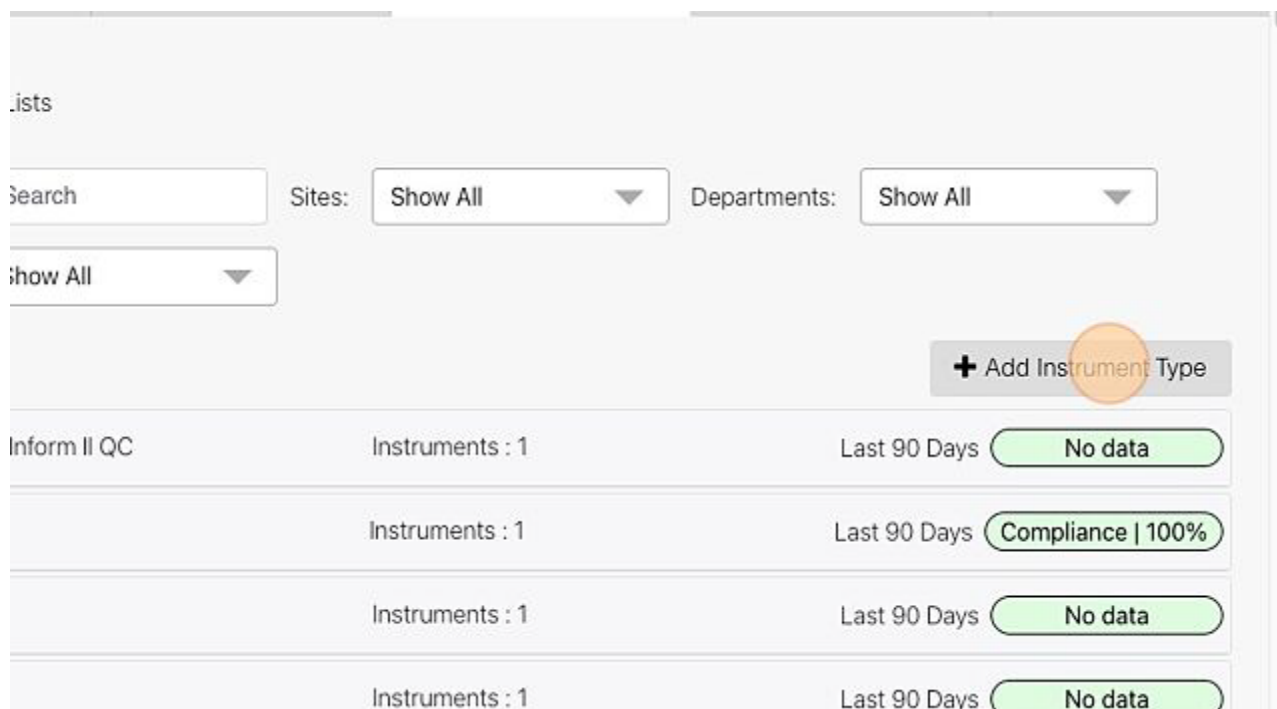
4. Enter the type of instrument and other information if desired

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"

8. Enter the Name and information

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

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 app.lablogs.co/#/dashboard/tasks and log into the system.
2. Click the Menu Icon.
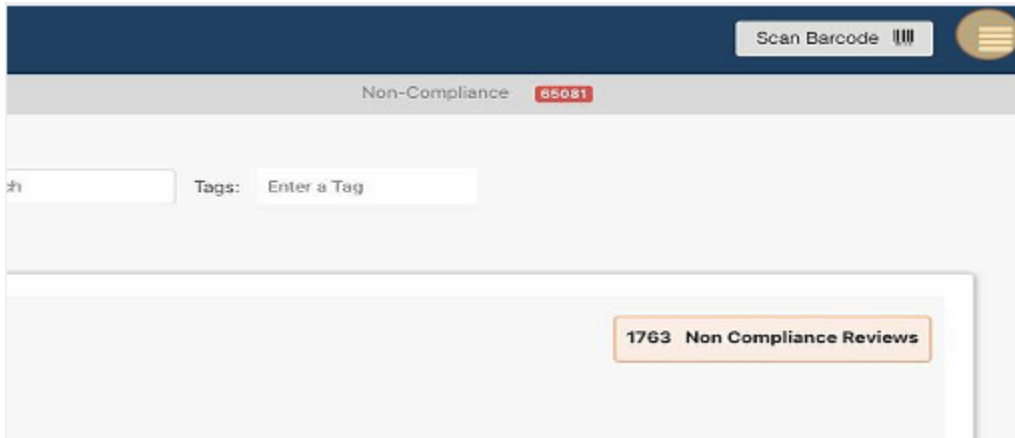
3. Click "ADMINISTRATION"
4. Click "Instruments"
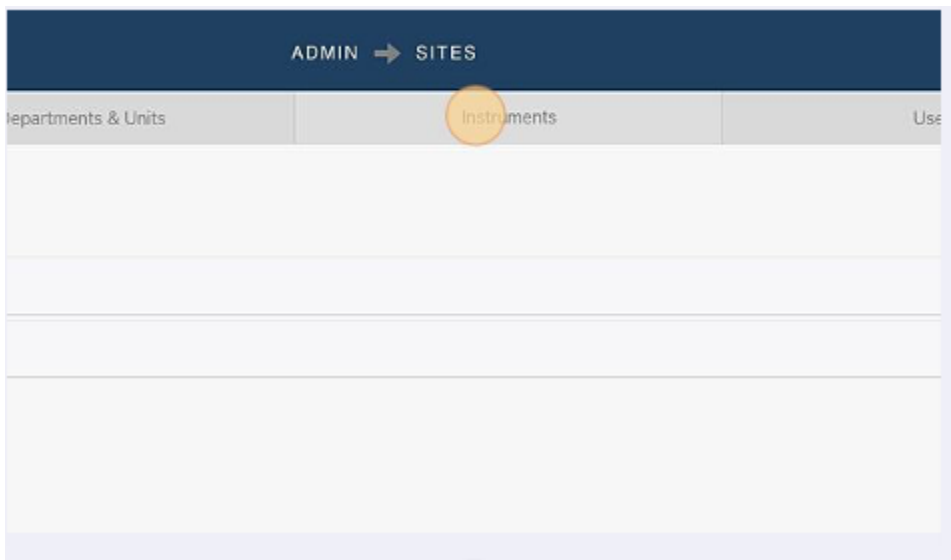
5. Click the "Search" field and enter the name of the Instrument Type you would like.
6. Click on the Instrument Type
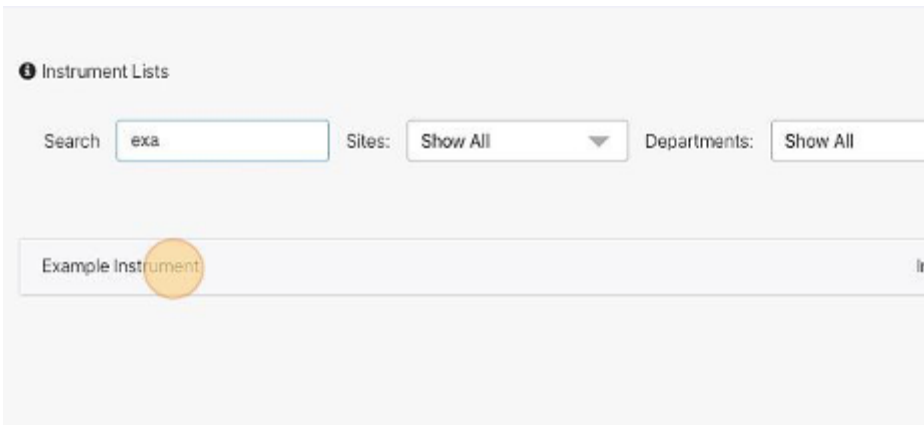
7. Click "Edit"
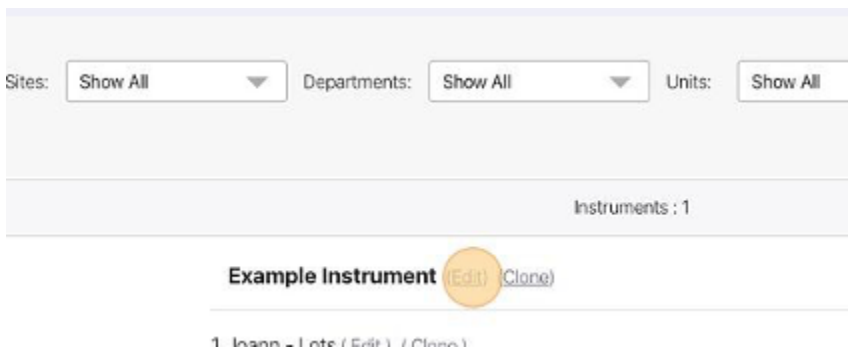
8. Click "Add Controls/Reagents Requirement"
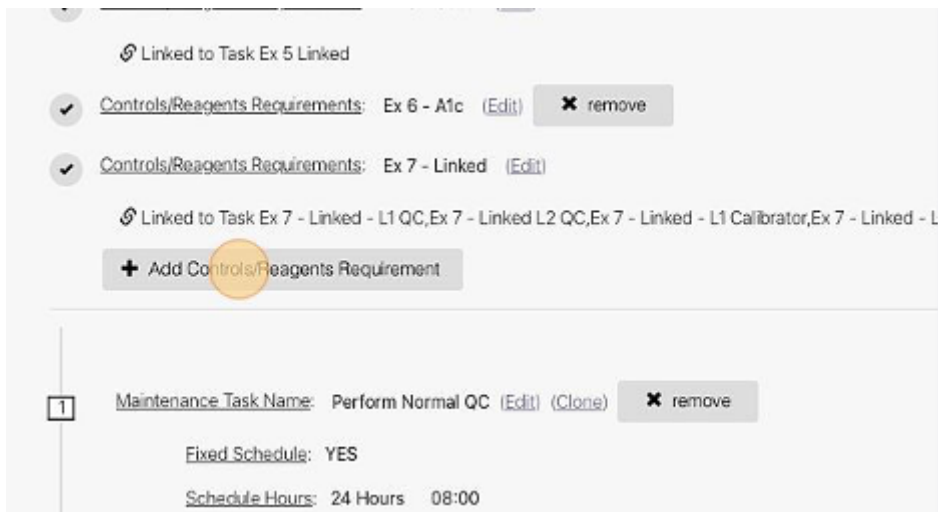
9. Click the "Enter Lot Name" field.
10. Enter the Name of your Control/Reagent
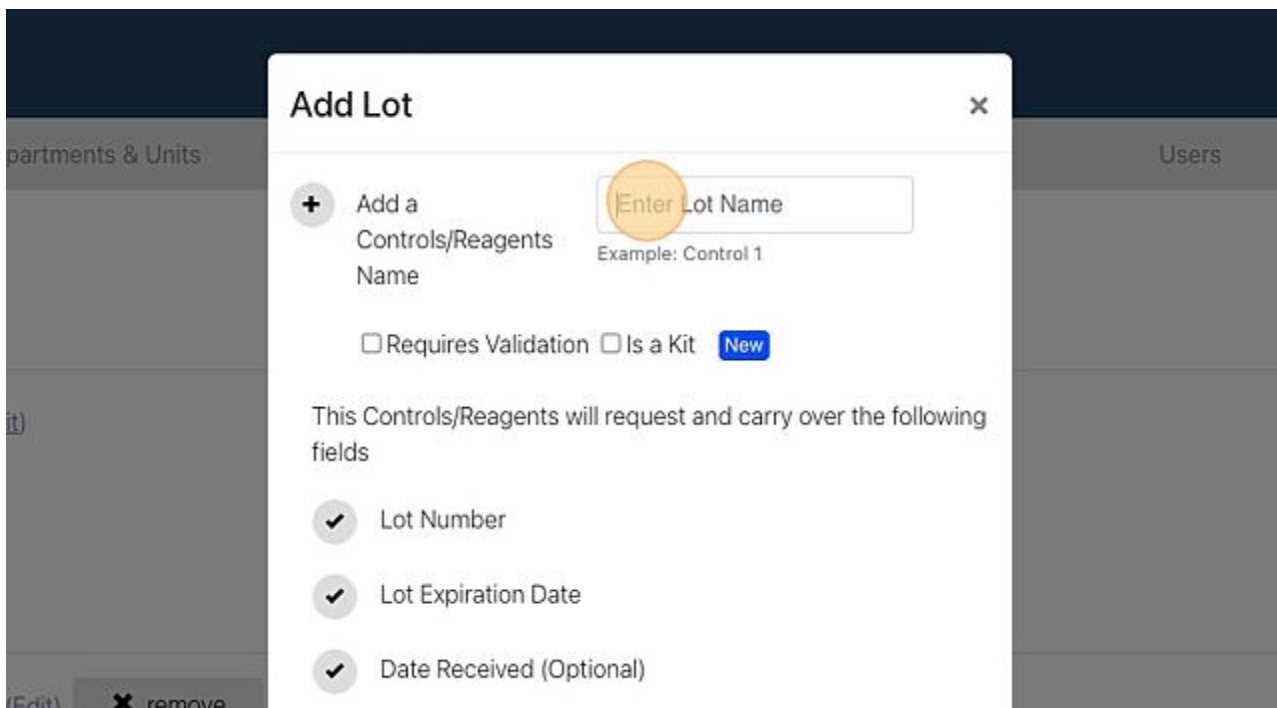
11. If the Control Reagent Requires a Validation Process to be completed before being considered "In Use", Click the "Requires Validation" field. (*Moderate Complex Tests*).
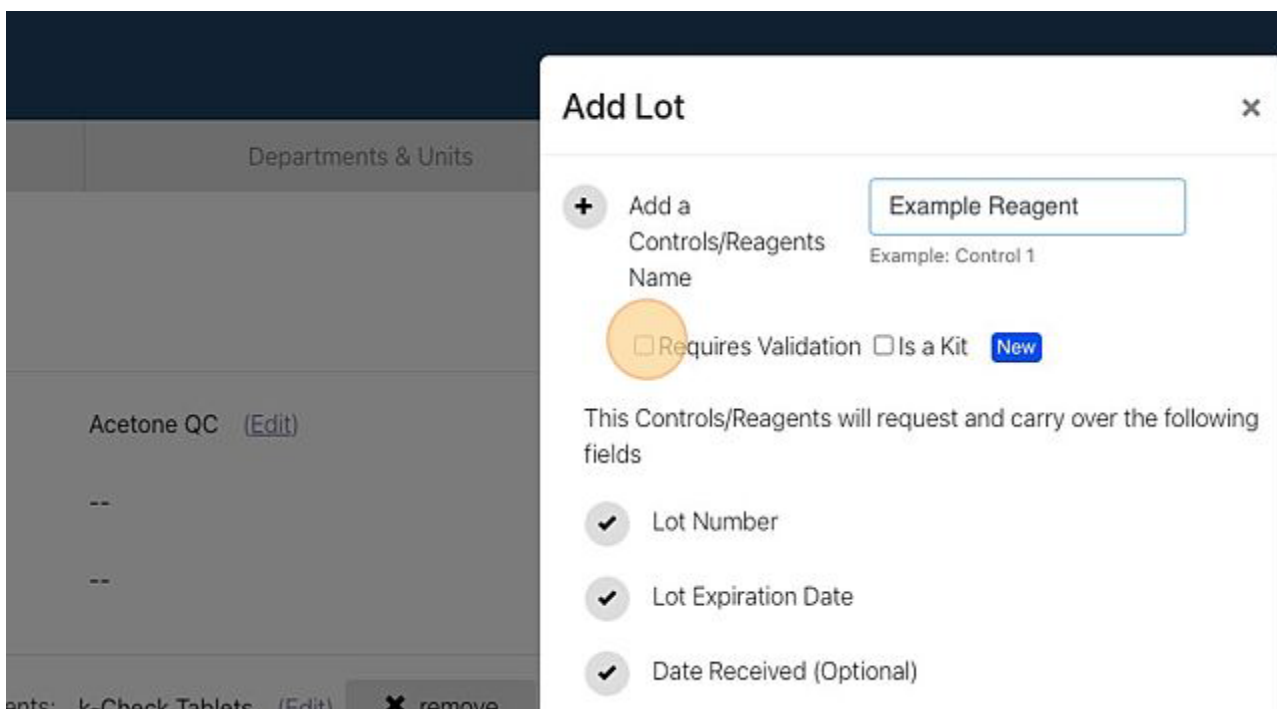
12. If the Control/Reagent is a "Kit" with multiple items and/or lot numbers, Click the "Is a Kit" field.

Add Lot   ✕

➕ Add a   Example Reagent
     Controls/Reagents
     Name   Example: Control 1

     ☑ Requires Validation ☐ Is a Kit New

     This Controls/Reagents will request and carry over the following
     fields

     ✔ Lot Number

     ✔ Lot Expiration Date

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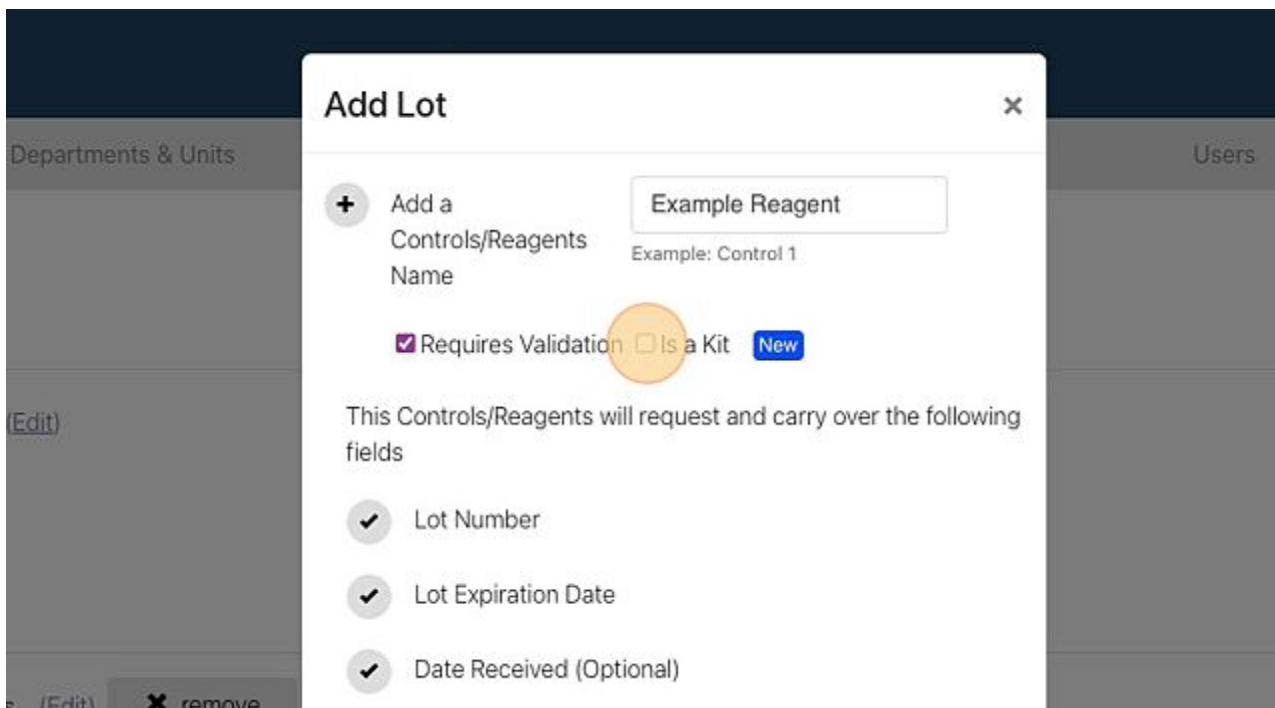
13. Click the "Enter Notes" field and enter anything you would like the User to see when creating a
    new Lot. Example: "Qc every Lot, Shipment, and 30 days."

✔ Lot Expiration Date

✔ Date Received (Optional)

✔ Date Opened (Optional)

✔ Date Discarded (Optional)

✔ Date In Use (Optional)

Notes (Optional)
Enter Notes

Add a Secondary   Save Lot   Cancel
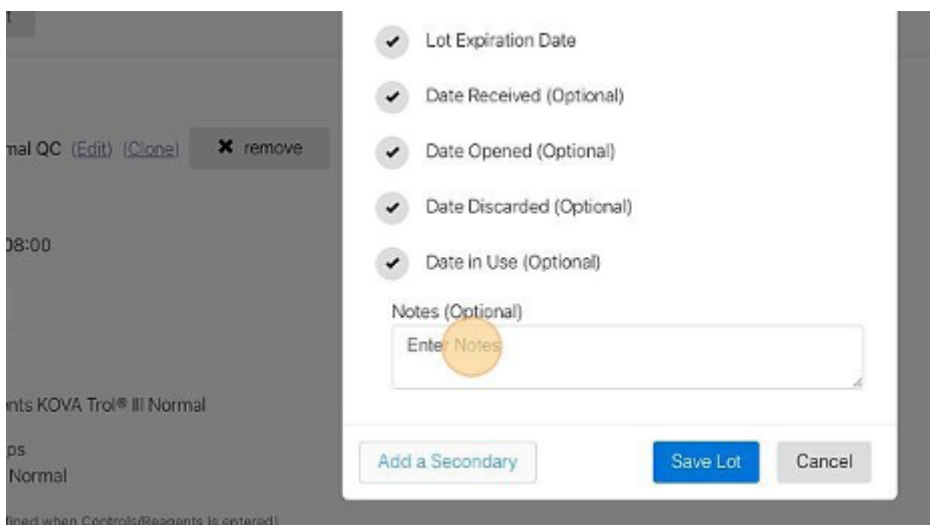
14. If you selected the "Is a Kit" box, Click "Add a Secondary". If not, skip to step 17.
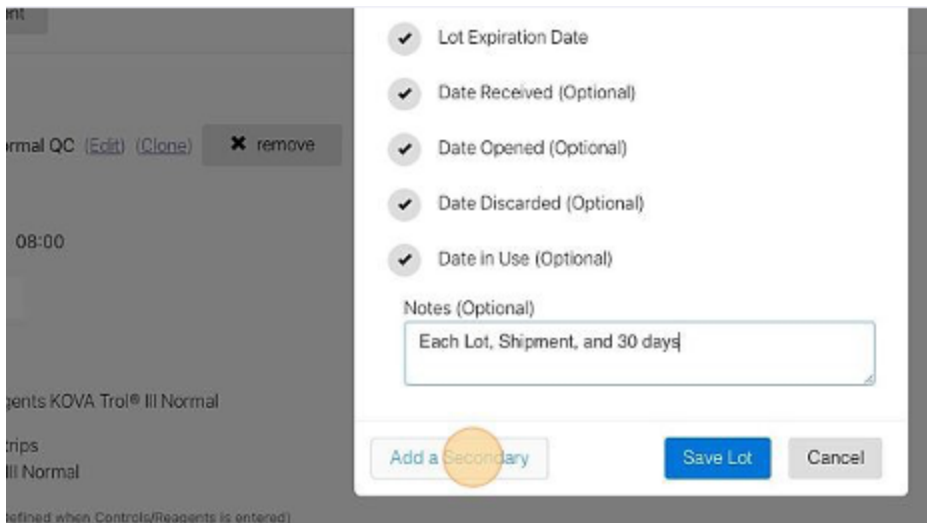
15. Click the "Name Text" field.
16. Enter the Name of the first item in your Kit. Example: Buffer A. You can also add a Description of each item within the Kit. Example: White Cap Solution used in step 3.
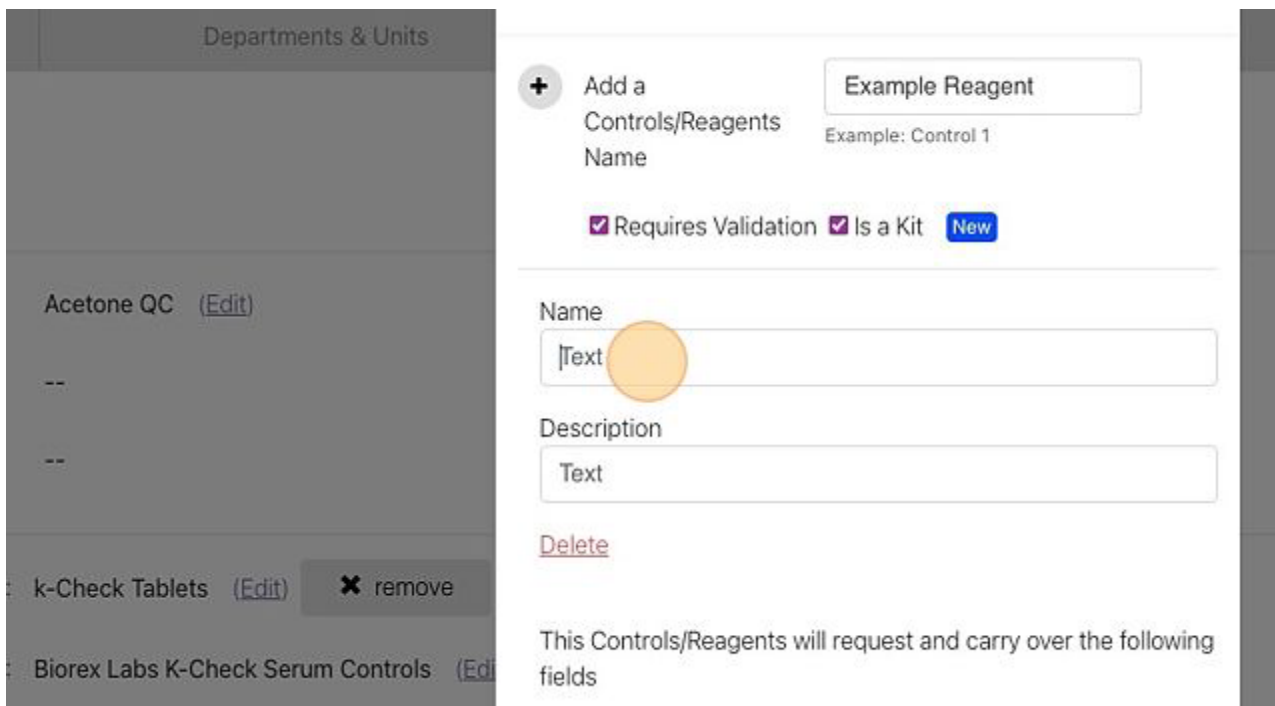
Repeat Steps 14 - 16 for each item within the Kit.

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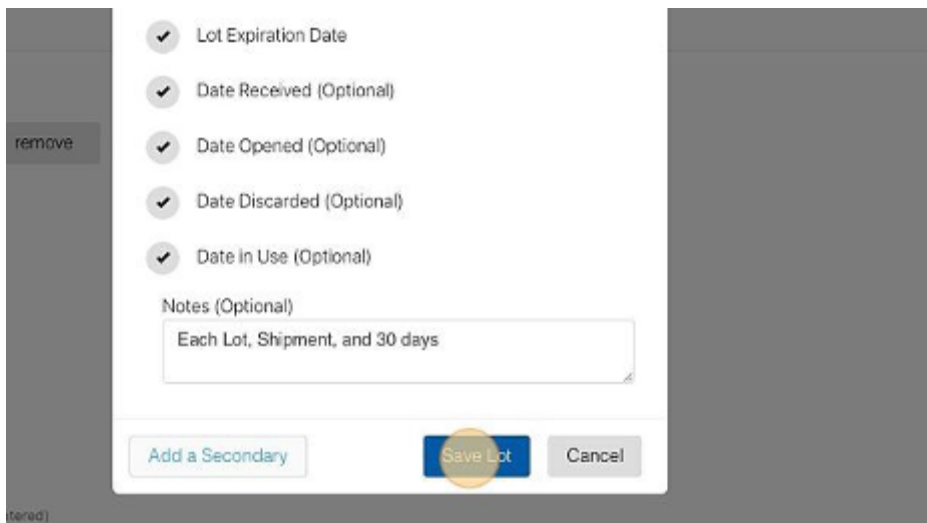
18. Scroll to the bottom on the page and click "Finish" and then Click Yes.

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.

3. Click "Edit"

Sites: Show All ▼ Departments: Show All ▼ Units: Show All ▼

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

Frequency: Unscheduled

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

🔗 Used Lots: Positive Control

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

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

7. Click "Save Task"

Example: PH Level

lue

☑ Acceptable   ✖ remove

☐ Acceptable   ✖ remove

tion

Save Task   Cancel

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 Requirement

nance Task Name: Perform Positive QC (Edit) (Clone)   ✖ remove

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

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

🔗 Used Lots: Positive QC

Data Fields:

Result	Defined Value

+ Add Maintenance Task

Finish   Cancel

11. Click "Yes"

Edit) (Clone)   ✖ remove

⚠

Confirmation

Are you sure you want to finish editing Instrument Type

Yes   Cancel

Defined Value   (acceptable: Positive)

Add Maintenance Tasks for the instrument

1. Select "+ Add Maintenance Task"

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

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

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.

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: Add an Instrument to a Bench/Unit
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:

Add a Maintenance Task
Add a Maintenance Task that is Linked to a Reagent/Control
Add a Maintenance Task that Uses a Reagent/Control

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*.

2. Select the *Instruments* tab.

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

4. Click on the *Add an Image Icon*

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
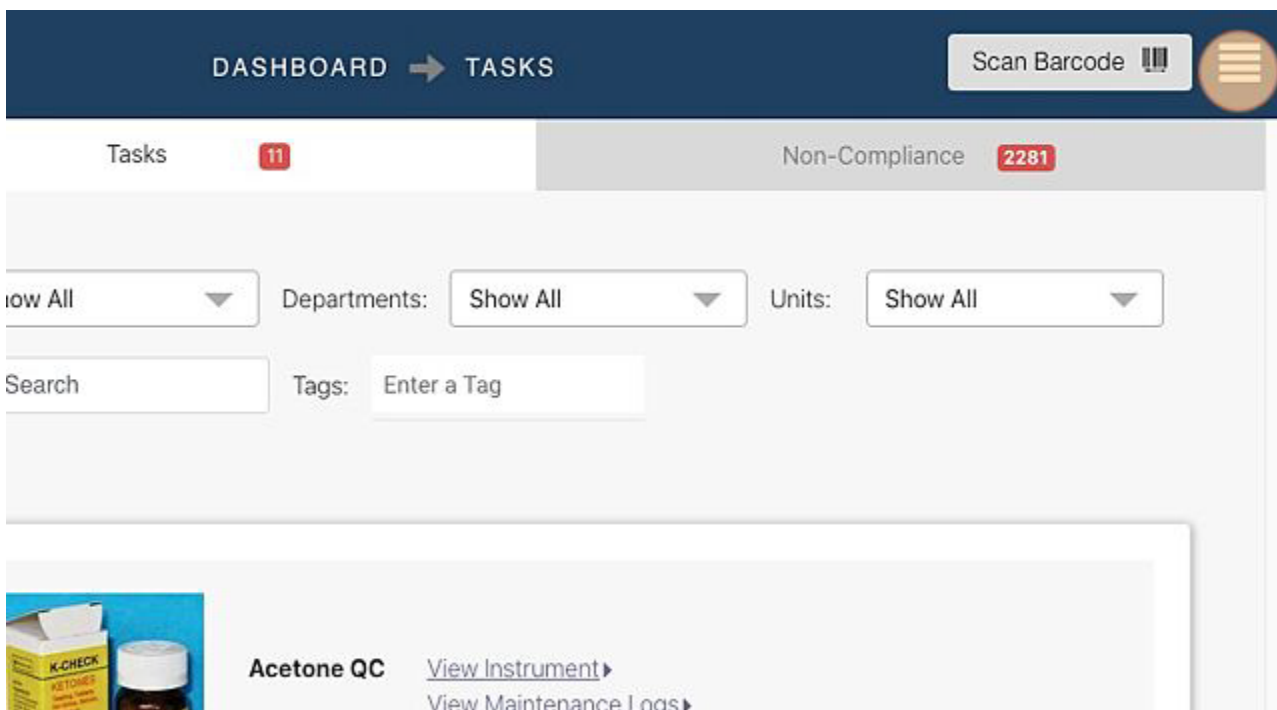
2. Administration
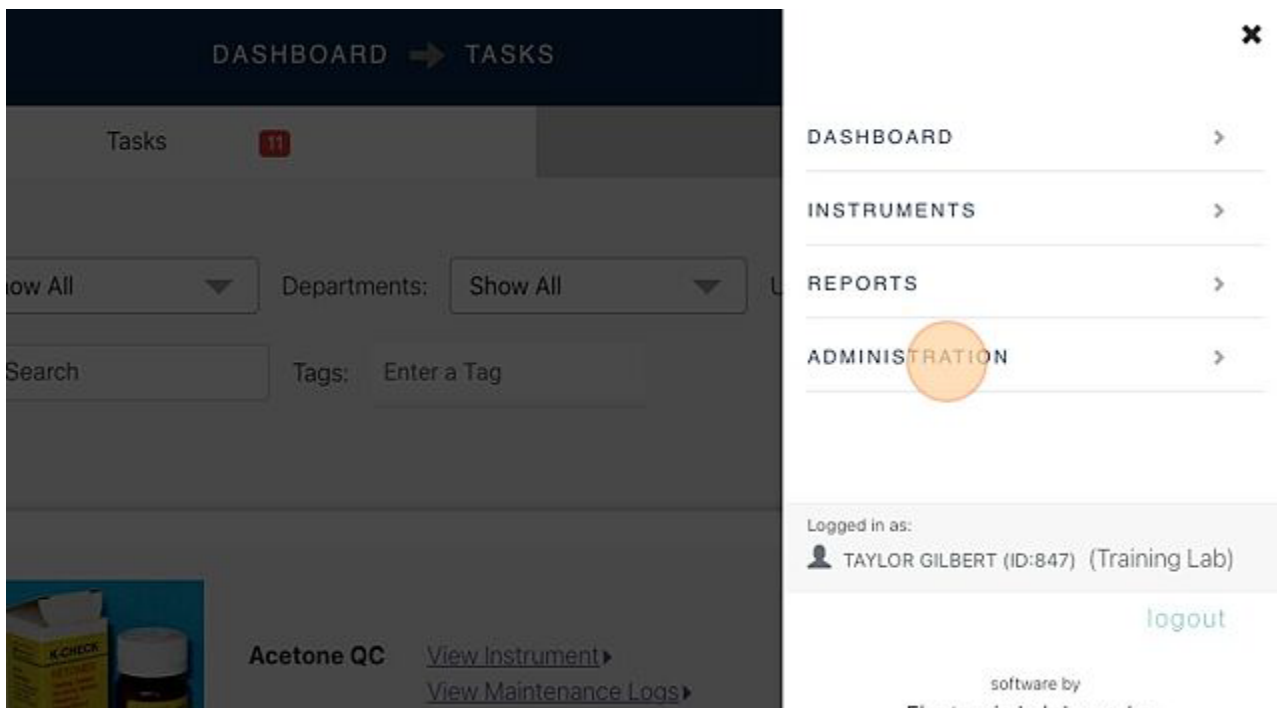
3. Instruments Tab
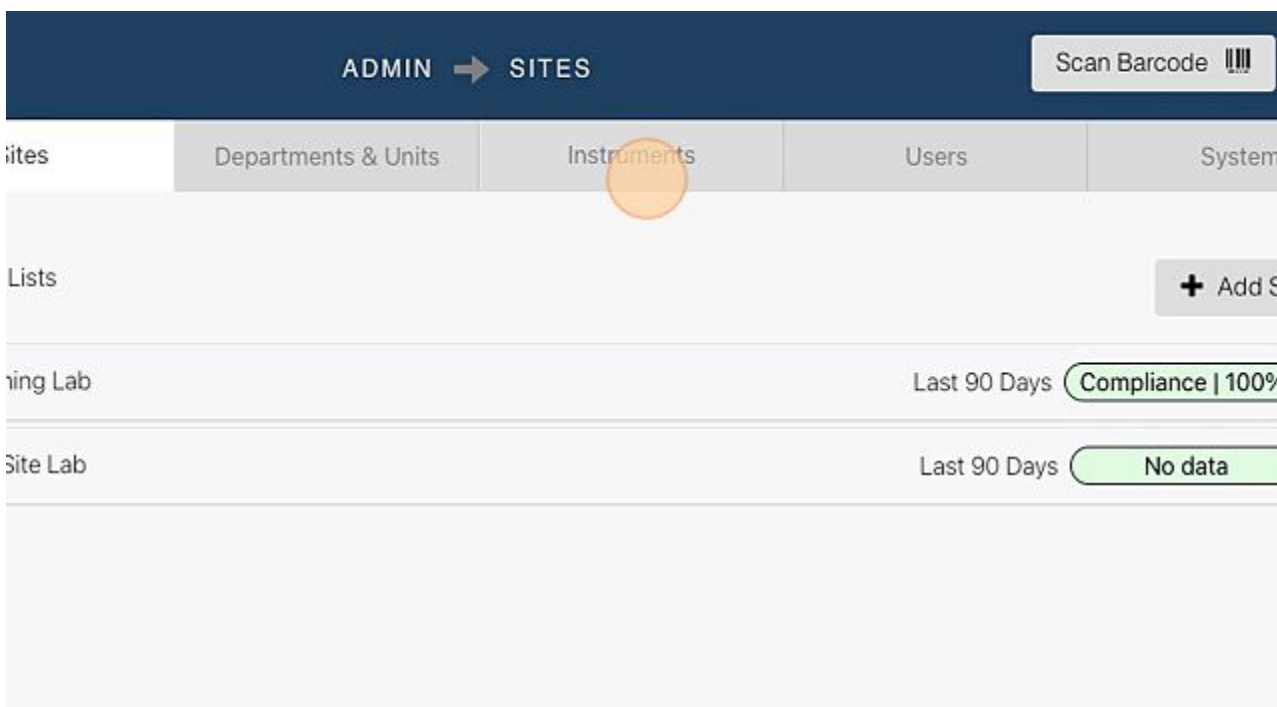
4. Select the Instrument Type you need and expand the panel.

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

6. Select Add File

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

8. Select Save

m size of a single document is 20MB

QC Log.pdf

pg

he Description

Save   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

s/n: -
ell id: 69
Location : Training Lab - Point of Care - Point of Care
Type : Amniotest
more info ▸

All Tasks   Reports

Documents (2) show files ▸

                                                    + Add Servic

Sort By   Status   Default   Frequency   A-Z

Tasks

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

All Tasks   Reports

Documents (2)   show files ▾

File Name	
Aminotest QC Log.pdf	⬇
PL901-20_en03.pdf	⬇

＋ Add Service Rep

Sort By   Status   Default   Frequency   A-Z

Tasks

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

2. Select the "Instruments" tab

Scan Barcode

| Sites | Departments & Units | Instruments | Users | Sy |

e Lists

+

aining Lab   Last 90 Days   No data

f Site Lab   Last 90 Days   No data
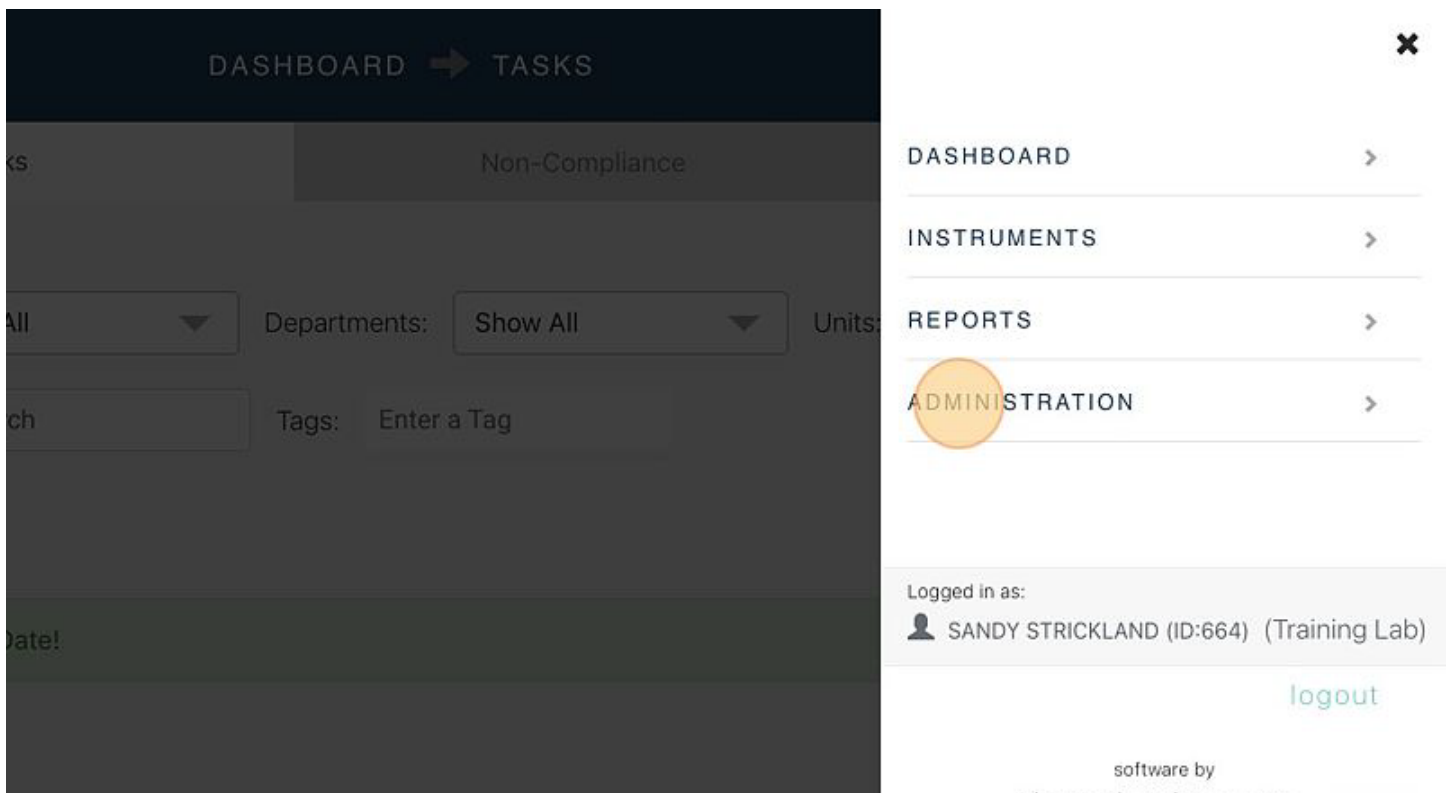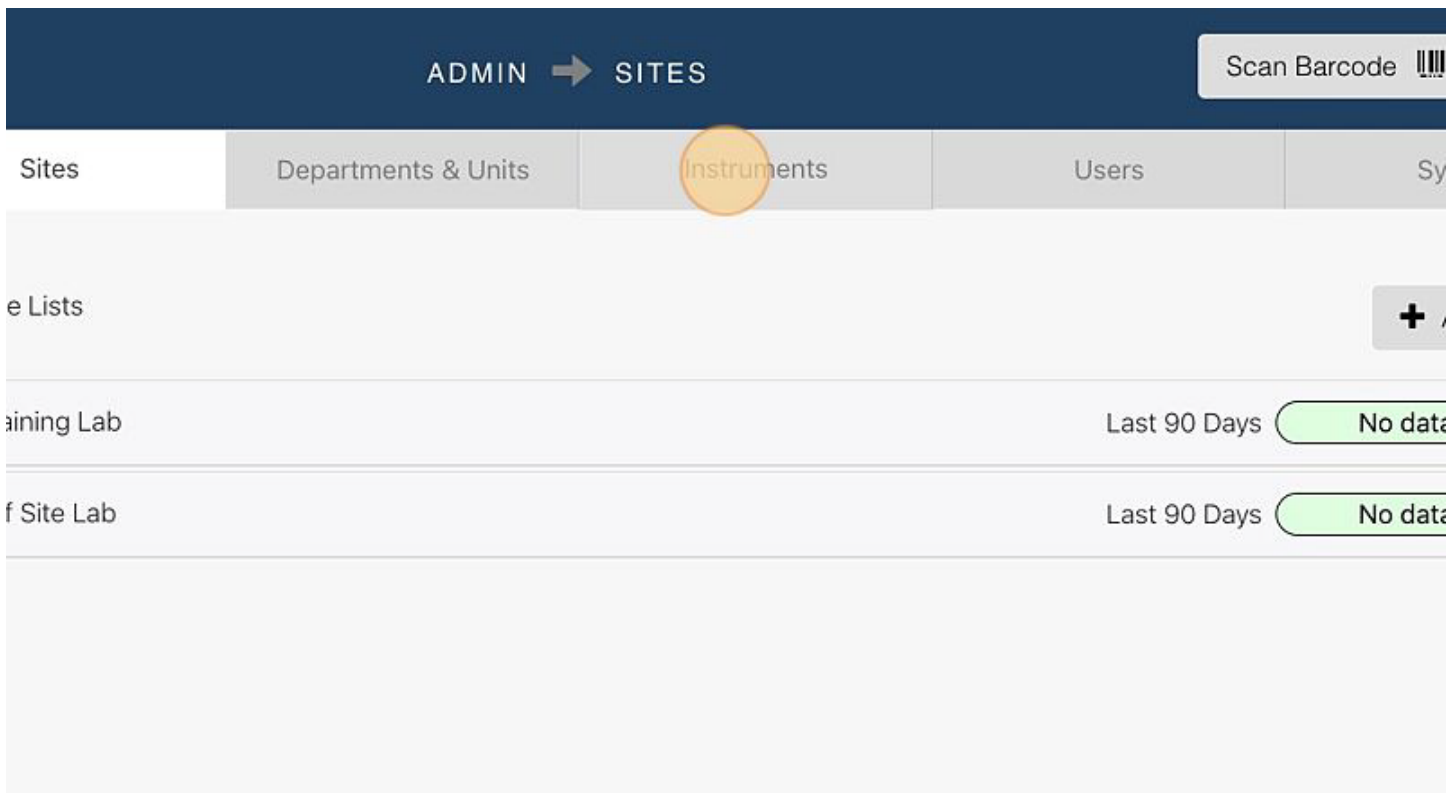
3. Select the Instrument Type you want to modify and expand the panel

Scan 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

5. Select the "+ Add Maintenance Task" button

6. Enter the name of the task to be completed

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

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

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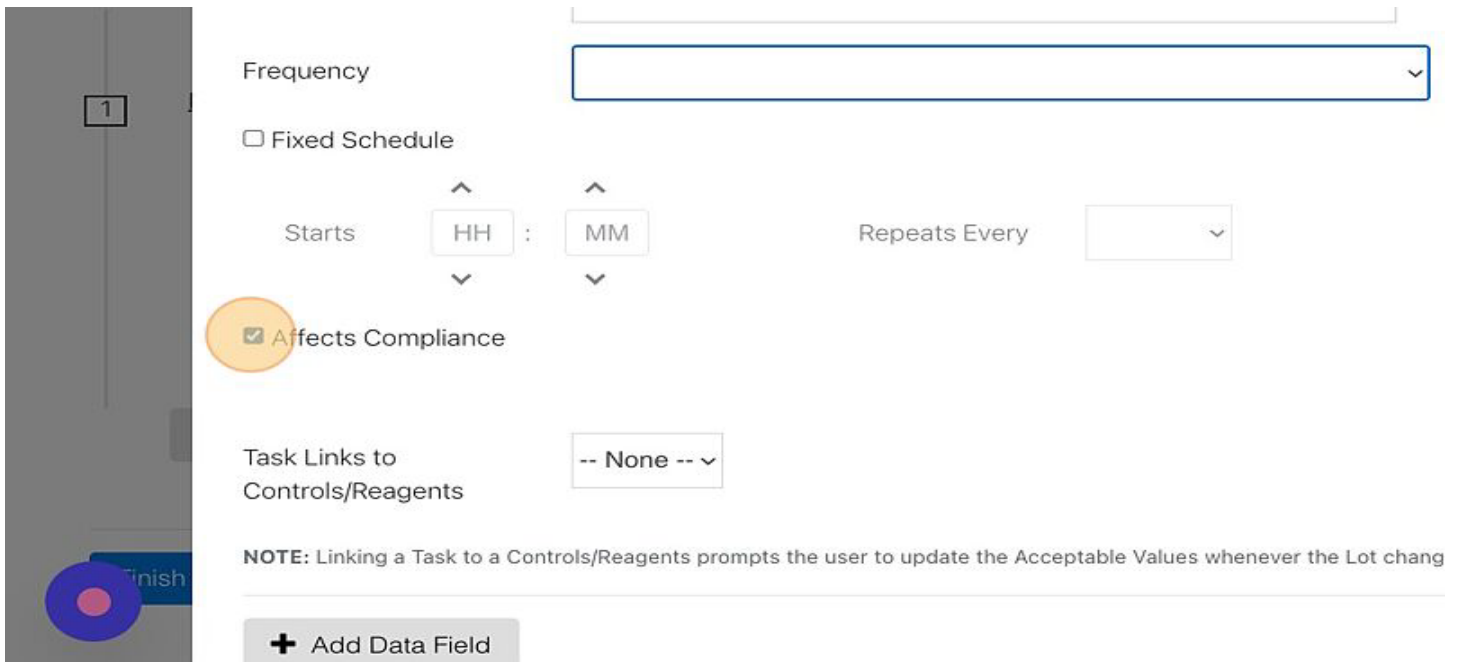
Fixed Schedule
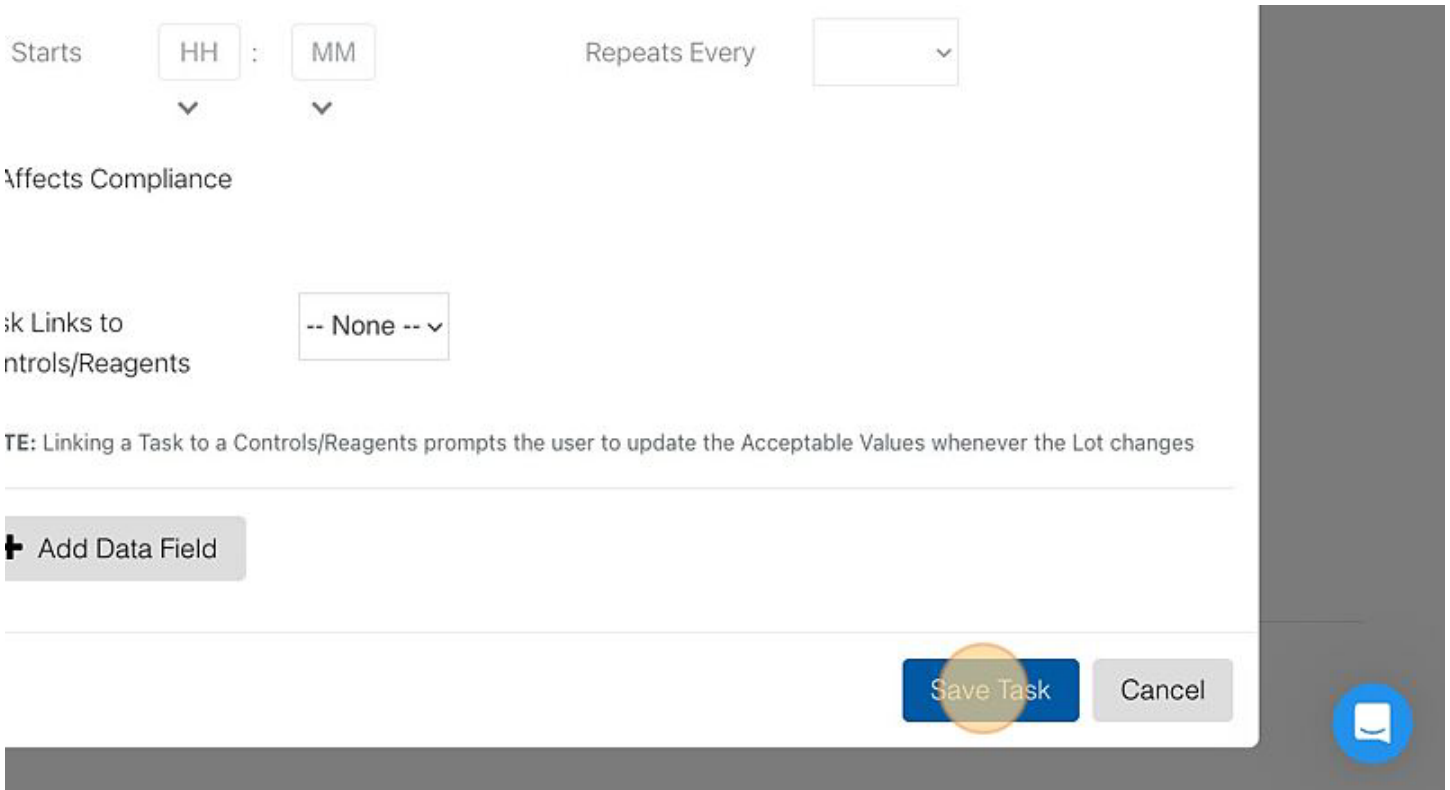
9. The Affects Compliance box is generated with √. This box must remain checked in order for validation of task completion to count towards compliance scores.

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

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"

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.
2. 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 time 3 hrs, Overdue after 5 hrs

☐ Fixed Schedule

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 Schedule

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	[⌄]

Edit Maintenance T[ask]

Maintenance Task

Notes (Optional)

Frequency

☐ Fixed Schedule

Starts	⌃ HH	:	⌃ MM	Repeats Every	⌄
	⌄		⌄		

Frequency dropdown:

Every 5 Days, Lead time 24 hrs, Overdue after 24 hrs
Weekly Lenient, Lead time 168 hrs, Overdue after 168 hrs
Weekly +/- 48 hours, Lead time 48 hrs, Overdue after 48 hrs
Weekly, Lead time 24 hrs, Overdue after 24 hrs
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
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
✓ Unscheduled

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.
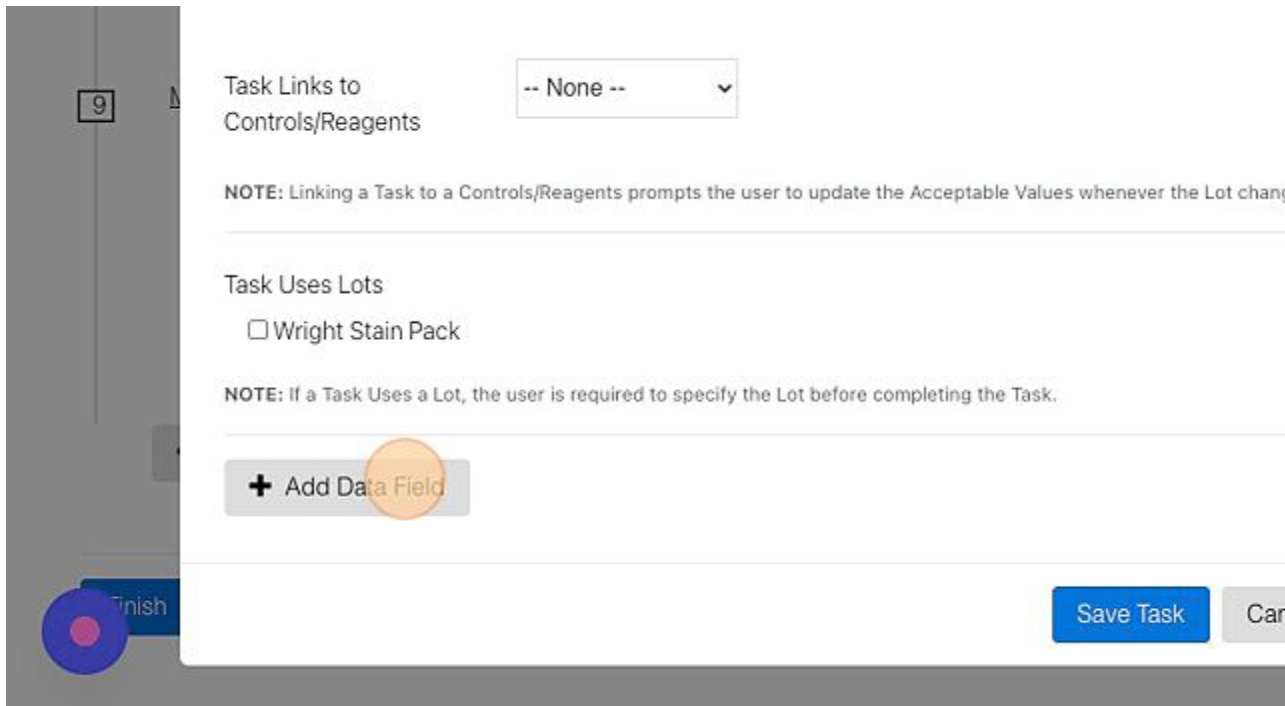
Add a Data Field for Text

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"

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

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.

Data Fields

☑ required   ☐ Is Confidential

Field Label [   ]   Example: PH Level

Field Type   [▾]

+ Add Data Field

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

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.

Data Fields

☑ required   ☐ Is Confidential

Field Label [   ]   Example: PH Level

Field Type   [▾]

+ Add Data Field

4. Enter the Label you want on this text box

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.

Data Fields

☑ required ☐ Is Confidential

Field Label [⬤] Example: PH Level

Field Type [▾]

+ Add Data Field

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

NOTE: If a Task Uses a Lot, the user is required to specify the Lot before completing the Task.

Data Fields

☑ required ☐ Is Confidential

Field Label [Corrective Action Taken] Example: PH Level

Field Type [▾]

+ Add Data Field

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

Action Taken Example: PH Level

[▾]

ential   (Clone) ✖ remove

[ ] Example: PH Level

[▾]

[Save Task] [Cancel]

7. When you have completed the rest of the instruments tasks select "Finish"
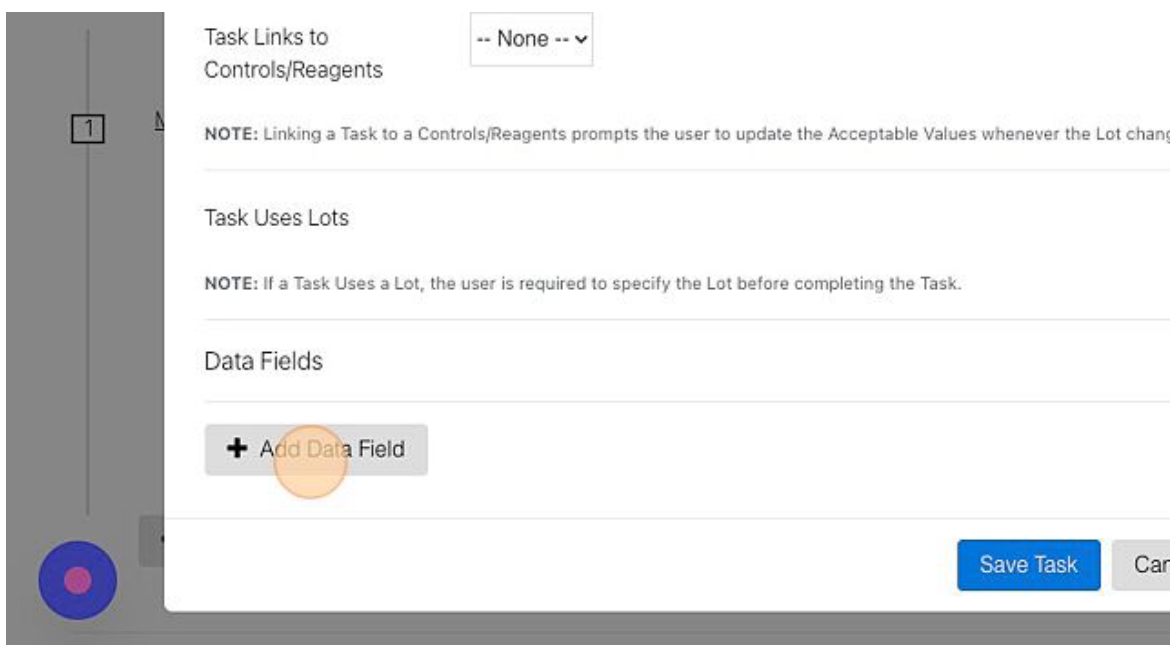
Add a Data Field with a Number Value

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"

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

Task Links to Controls/Reagents   -- None -- ▾

NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo

Data Fields

☑ required   ☐ Is Confidential

Field Label   [   ]   Example: PH Level

Field Type   [▾]

➕ Add Data Field

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

Task Links to Controls/Reagents   -- None -- ▾

NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo

Data Fields

☑ required   ☐ Is Confidential

Field Label   [   ]   Example: PH Level

Field Type   [▾]

➕ Add Data Field

4. Enter the Label you want on this value

Task Links to Controls/Reagents   -- None -- ⌄

NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo

Data Fields

☑ required   ☐ Is Confidential

Field Label   [   ]   Example: PH Level

Field Type   [⌄]

➕ Add Data Field

Instrume

Manufac

Model #

Controls

➕ Ac

Would

➕ Ac

ip >>

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

Task Links to Controls/Reagents   -- None -- ⌄

NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lo

Data Fields

☑ required   ☐ Is Confidential

Field Label   [Temperature °C]   Example: PH Level

Field Type   [⌄]

➕ Add Data Field

Instrume

Manufac

Model #

Controls

➕ Ac

Would

➕ Ac

Skip >>

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

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

9. Enter the value or values to complete the field

10. Select "Save Task" when you have added all the data fields necessary
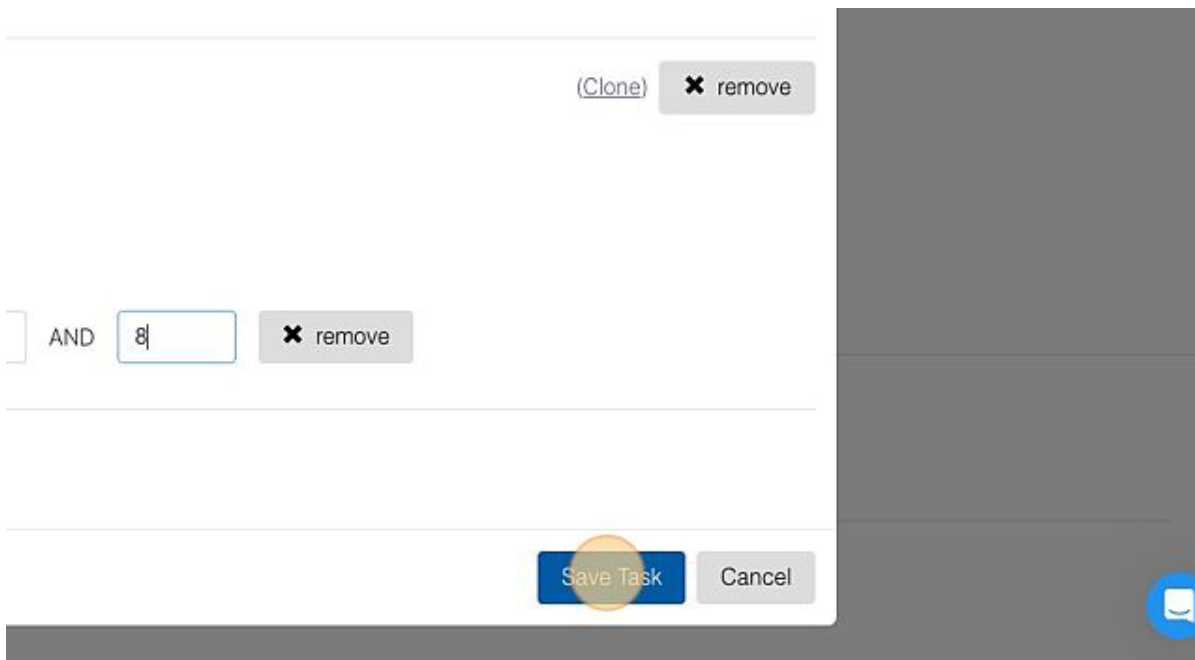
11. When you have completed the rest of the instrument's tasks select "Finish"
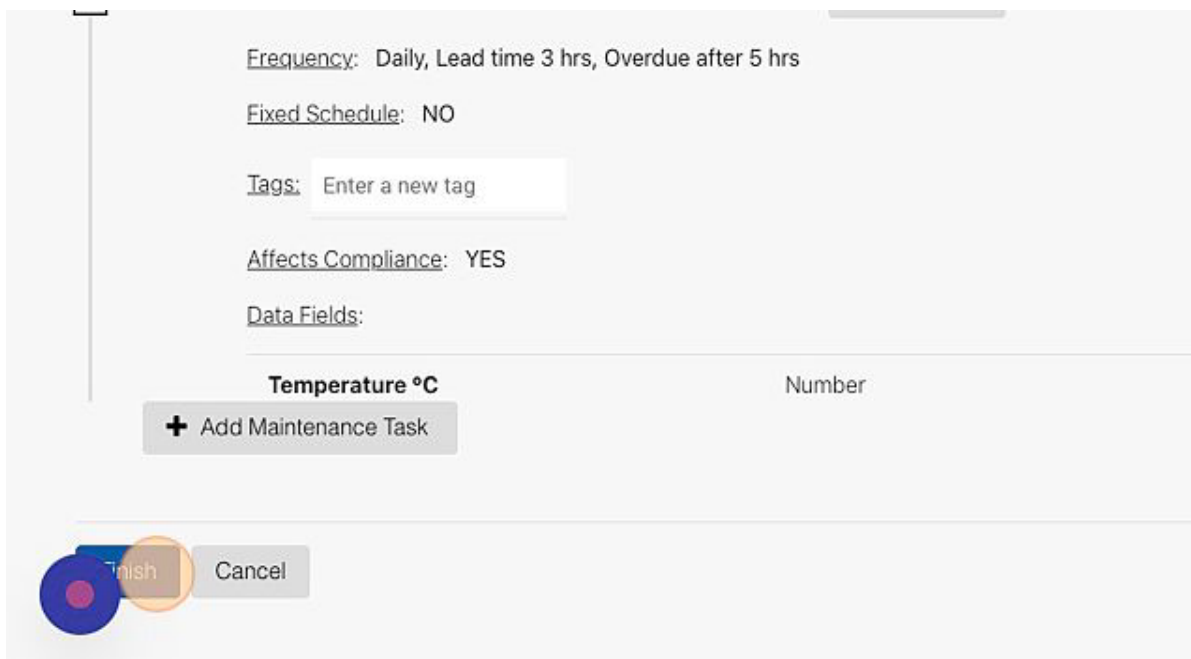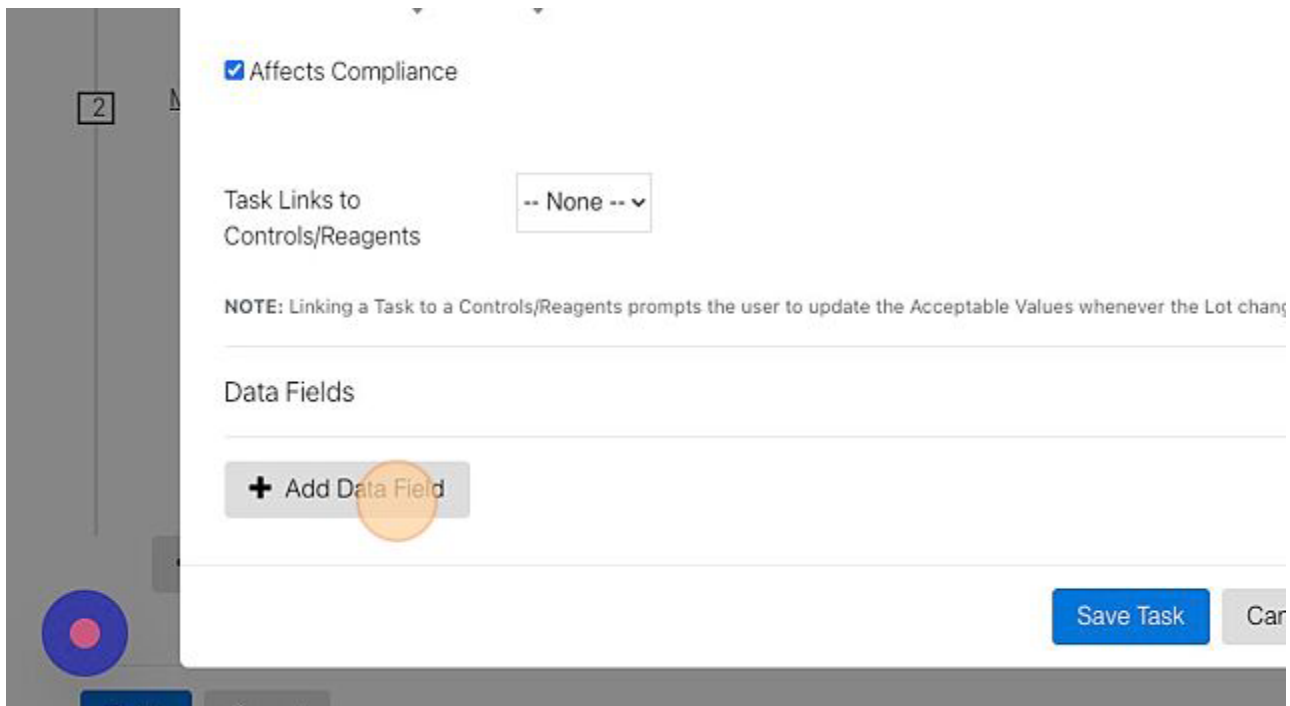
Add a Data Field with Defined Value

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:

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

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

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

4. Enter the Label you want on this field

5. From the drop down box next to Field Type, Select "Defined Value"
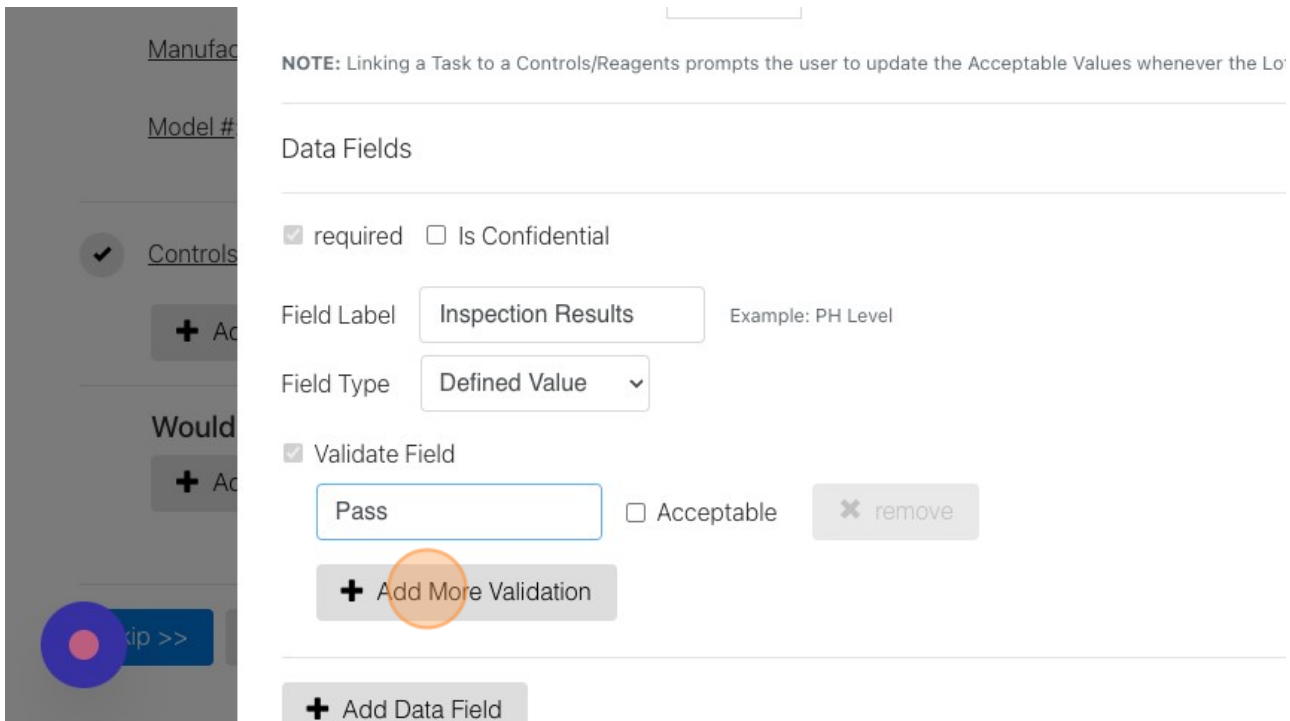
6. Add as many possible outcomes for the task as necessary
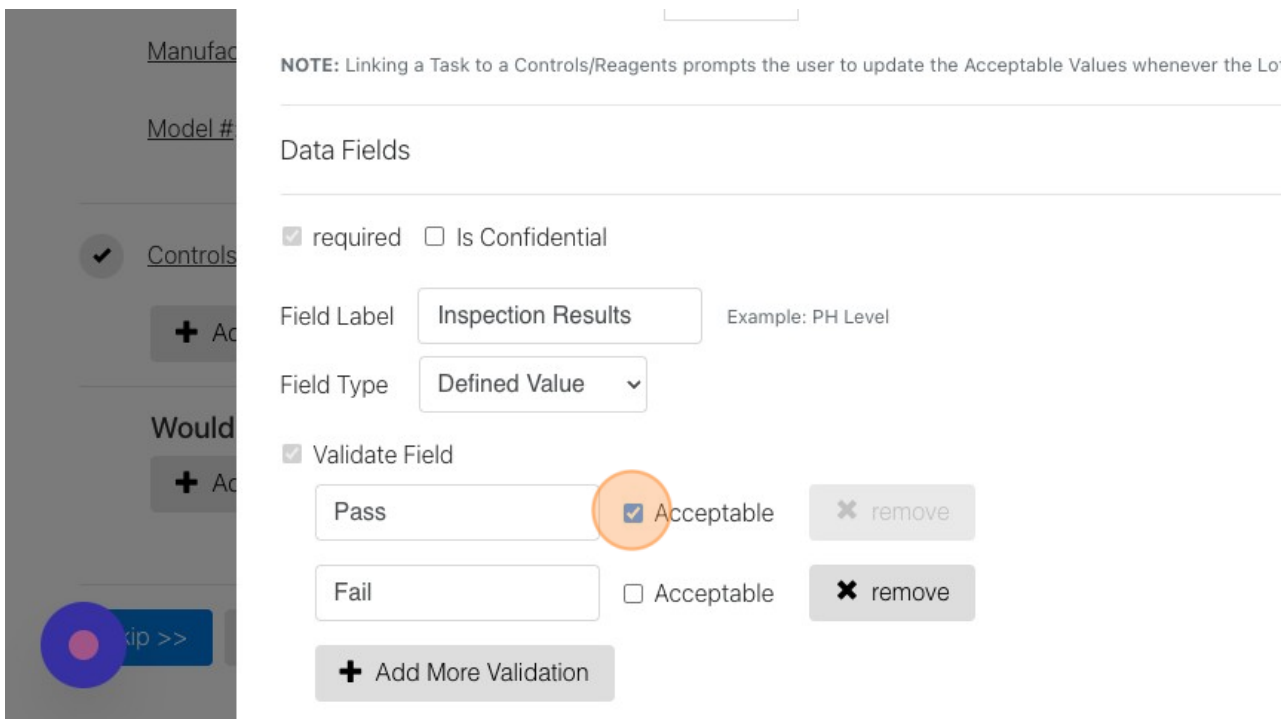
7. For each Acceptable field, check the box next to "Acceptable"

8. Select "Save Task" when you have added all the data fields necessary for the maintenance task
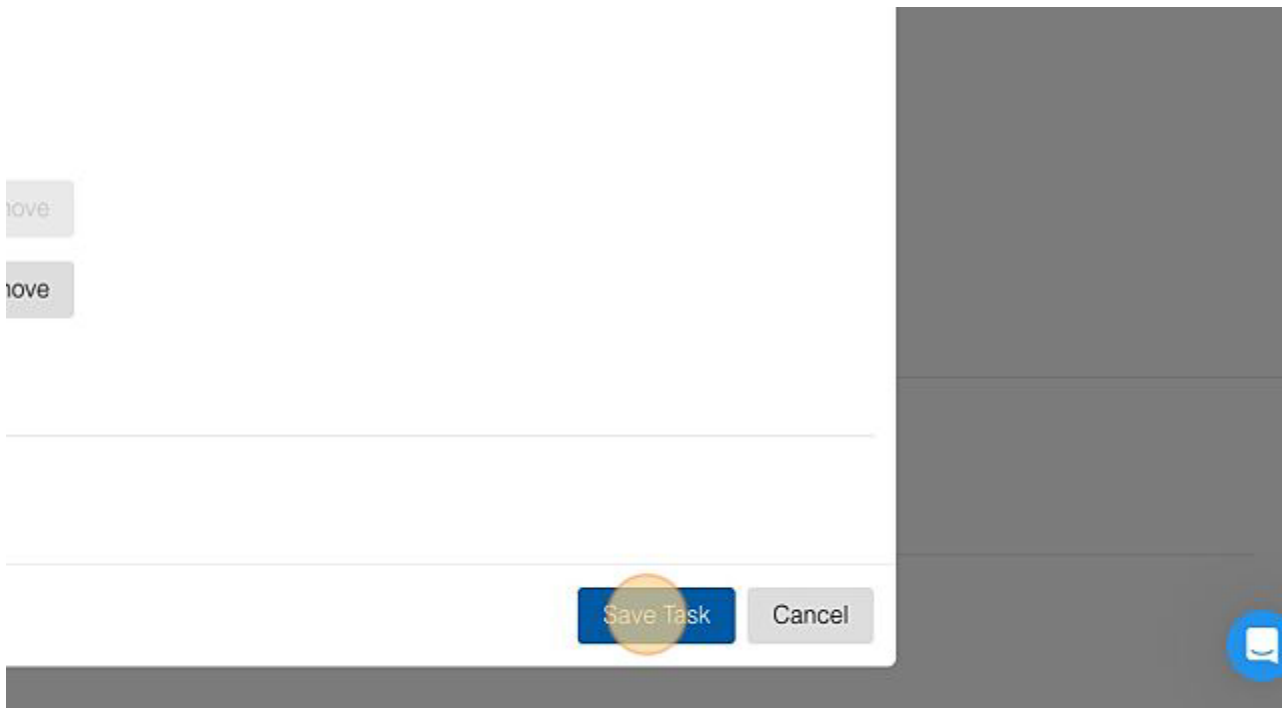
9. When you have completed the rest of the instrument's tasks select "Finish"
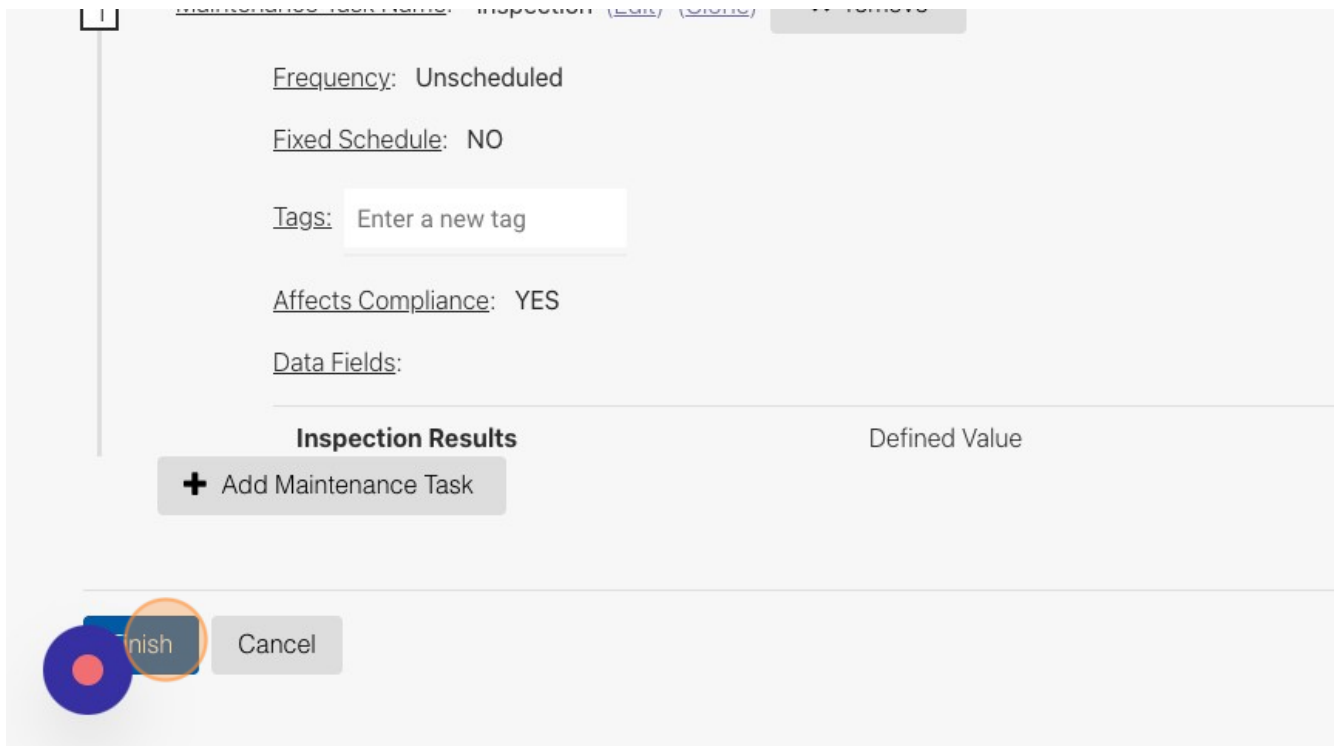
Add a Data Field for a File Attachment
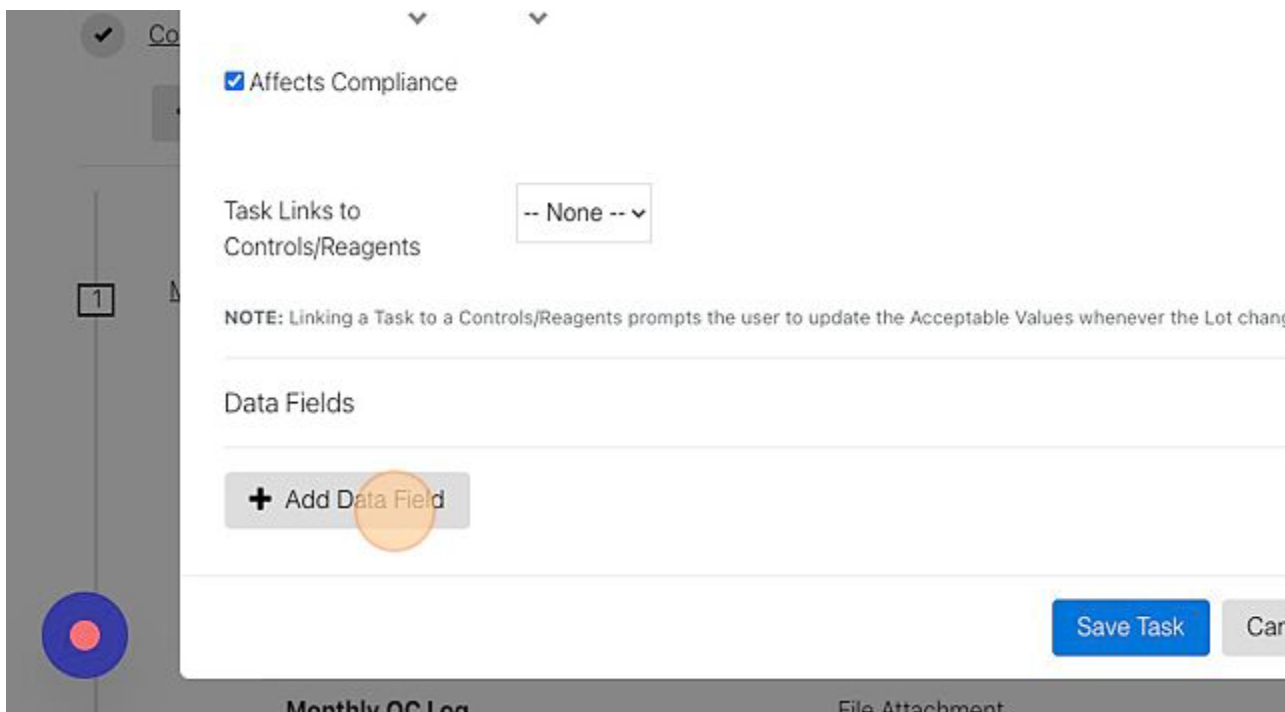
Attach a file, PDF document to a maintenance Task.

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"

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

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

4. Enter the Field Label

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

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

Save Task   Cancel

8. 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:

Monthly QC Log   File Attachment

+ Add Maintenance Task

Finish   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:

1. Select "Administration" from the Menu
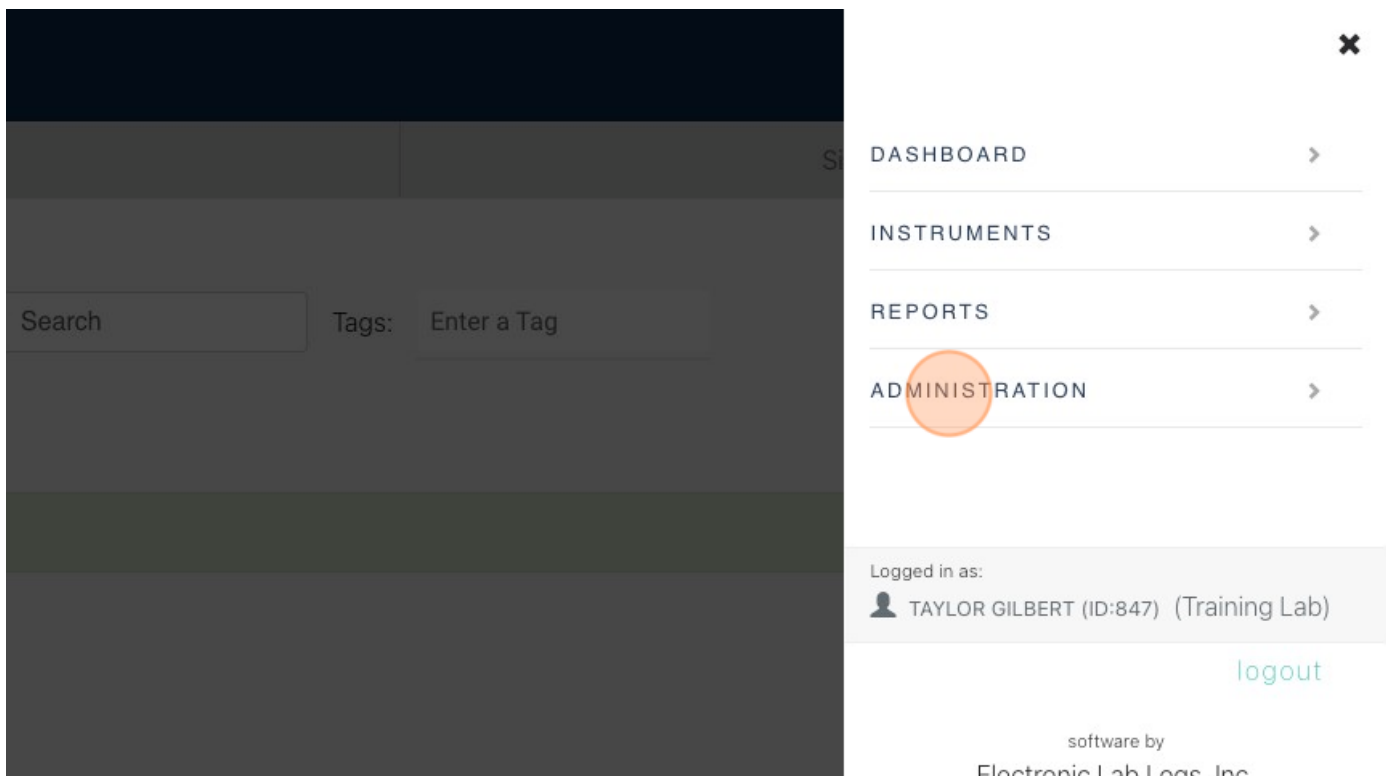
2. Select the "Instruments" tab

epartments & Units	Instruments	Users

3. Select the desired Instrument

ⓘ Instrument Lists

Search	Search	Sites:	Show All	▼	Departments:	Show All

Accu-Chek Inform II QC	Instrum
Acetone QC	Instrum
Amniotest	Instrum
Ana-ID	Instrum
Antigen Typing QC	Instrum
API	Instrum

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

Sites: Show All ▼ Departments: Show All ▼ Units: Show All

Instruments : 1

Instruments : 1

Acetone QC (Edit) (Clone)

1. Acetone QC (Edit) (Clone)
   Site: Training Lab
   Department: Chemistry
   Bench / Unit: Chemistry
   ell id: 157
   1

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

Tags: Enter a new tag

Affects Compliance: YES

🔗 Used Lots: k-Check Tablets
🔗 Used Lots: Biorex Labs K-Check Serum Controls
🔗 Used Lots: Certified Timer

Data Fields:

Level 0	Defined Value
Level 1	Defined Value
Level 2	Defined Value

+ Add Maintenance Task

Finish Cancel

6. Enter the name of the task to be completed

Add Maintenance Task

Maintenance Task	Enter Maintenance Task
	Example: Run Level 1 QC
Notes (Optional)	* Maximum 5000 characters allowed
	B I U S H₁ H₂ ☰ ☰ X₂ x² ⊡ ⊡ ▸¶ Normal
	Normal ↕ A 🄰 Sans Serif ↕ ☰ Iₓ 🔗
	Enter Notes here...
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

Add Maintenance Task

Maintenance Task	Perform Level 1 QC
	Example: Run Level 1 QC
Notes (Optional)	* Maximum 5000 characters allowed
	B I U S H₁ H₂ ☰ ☰ X₂ x² ⊡ ⊡ ▸¶ Norr
	Normal ↕ A 🄰 Sans Serif ↕ ☰ Iₓ 🔗
	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)

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

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)

12. Select "Save Task"

e the Acceptable Values whenever the Lot changes

e completing the Task.

Save Task   Cancel

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

2   Maintenance Task Name: Check Certified Timer (Edit) (Clone)   ✖ remove

Frequency: Unscheduled

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

🔗 Used Lots: Certified Timer

➕ Add Maintenance Task

Finish   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

3. Enter the name of the task to be completed

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

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)

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

Enter Notes here...

Frequency

☐ Fixed Schedule

Starts | HH | : | MM | Repeats Every [⌄]

☑ Affects Compliance

Finish

Task Links to Controls/Reagents   [-- None -- ⌄]

NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lot chang

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

☐ Fixed Schedule

Starts | HH | : | MM | Repeats Every [⌄]

☑ Affects Compliance

Task Links to Controls/Reagents   [-- None -- ⌄]

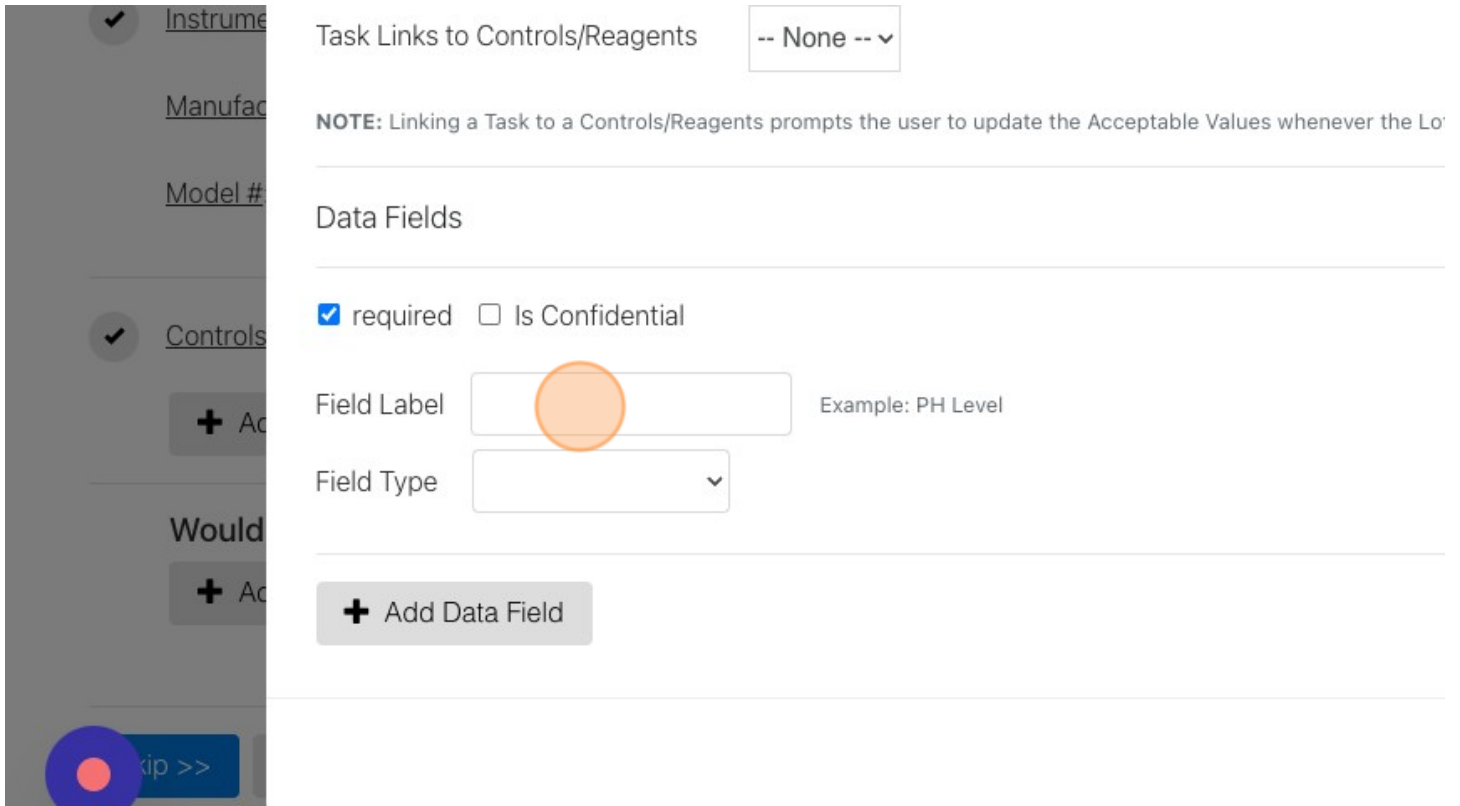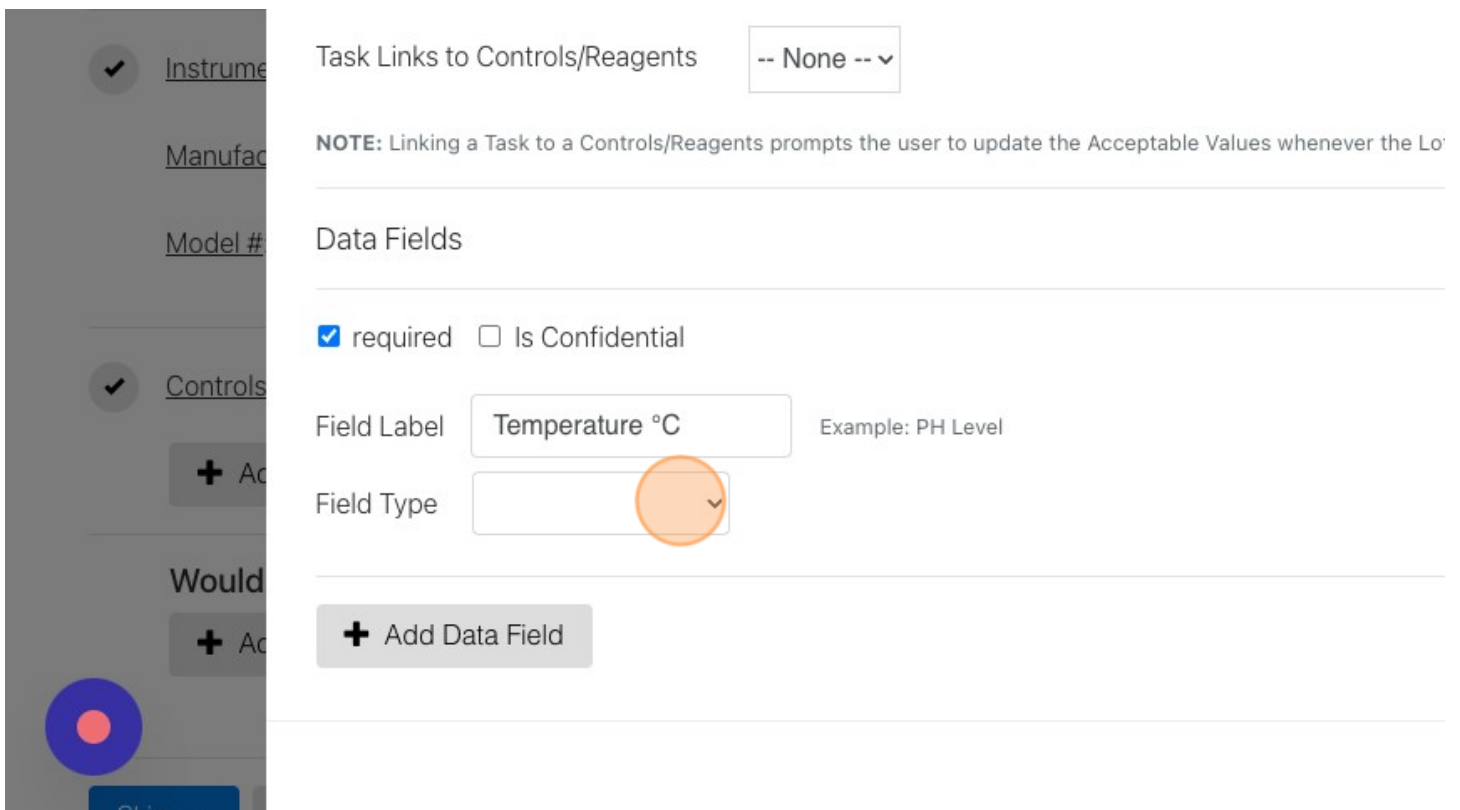**NOTE:** Linking a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lot changes

Task Uses Lots

☐ E. Coli ATCC 25922

NOTE: If a Task Uses a Lot, the user is required to specify the Lot before completing the Task.

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

Controls/Reagents Requirements: E. Coli

➕ Add Controls/Reagents Requiremen

➕ Add Maintenance Task

[h]   Cancel

Starts   [⌃ HH ⌄] : [⌃ MM ⌄]   Repe

☑ Affects Compliance

Task Links to Controls/Reagents   [E. Coli ATCC 25922 ⌄]

NOTE: Linking a Task to a Controls/Reagents prompts the user to update the Acceptable

➕ Add Data Field

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

(Clone)   ✖ remove

is entered)

Save Task   Cancel

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

Frequency: Every 90 Days, Lead time 24 hrs, Overdue after 24 hrs

Fixed Schedule: NO

Tags: Enter a new tag
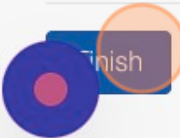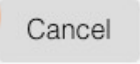
Affects Compliance: YES

🔗 Task Links to Controls/Reagents E. Coli ATCC 25922

Data Fields: (Acceptable Values Defined when Controls/Reagents is entered)

Colony Count   Number

+ Add Maintenance Task

Finish   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

2. Select the "Instruments" tab

Scan Barc

ces	Departments & Units	Instruments	Users

ts

g Lab   Last 90 Days Comp
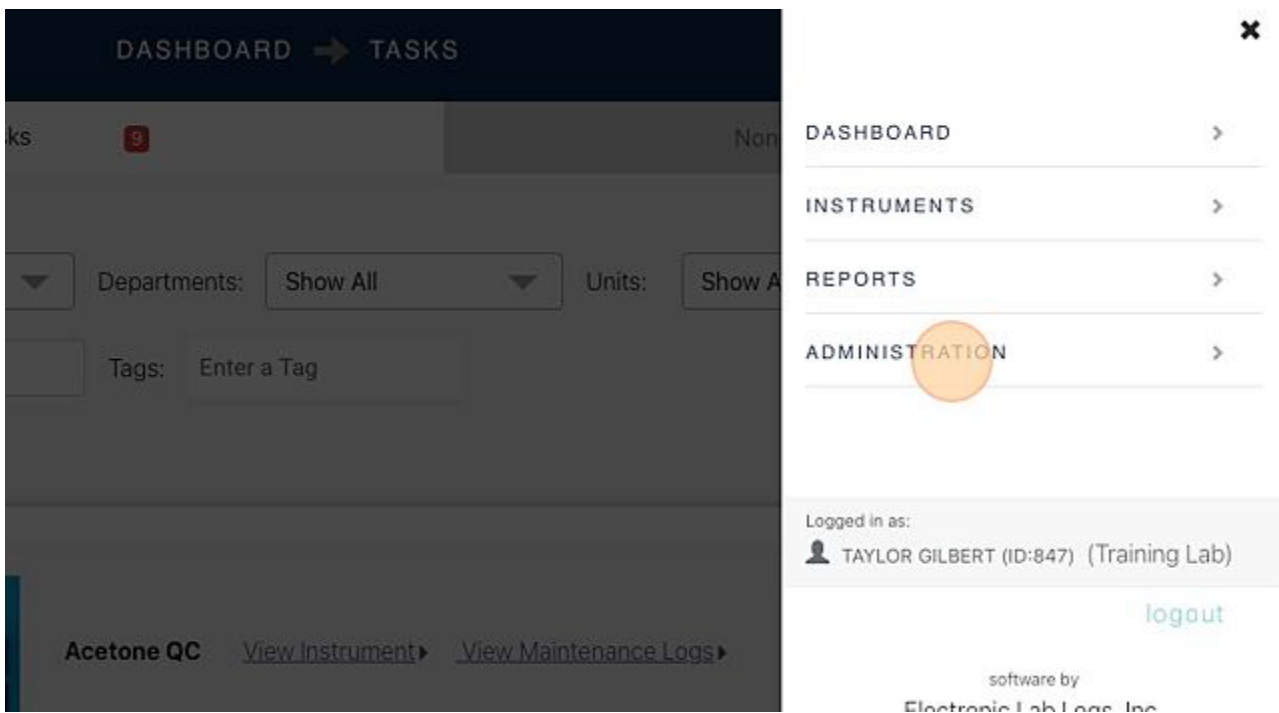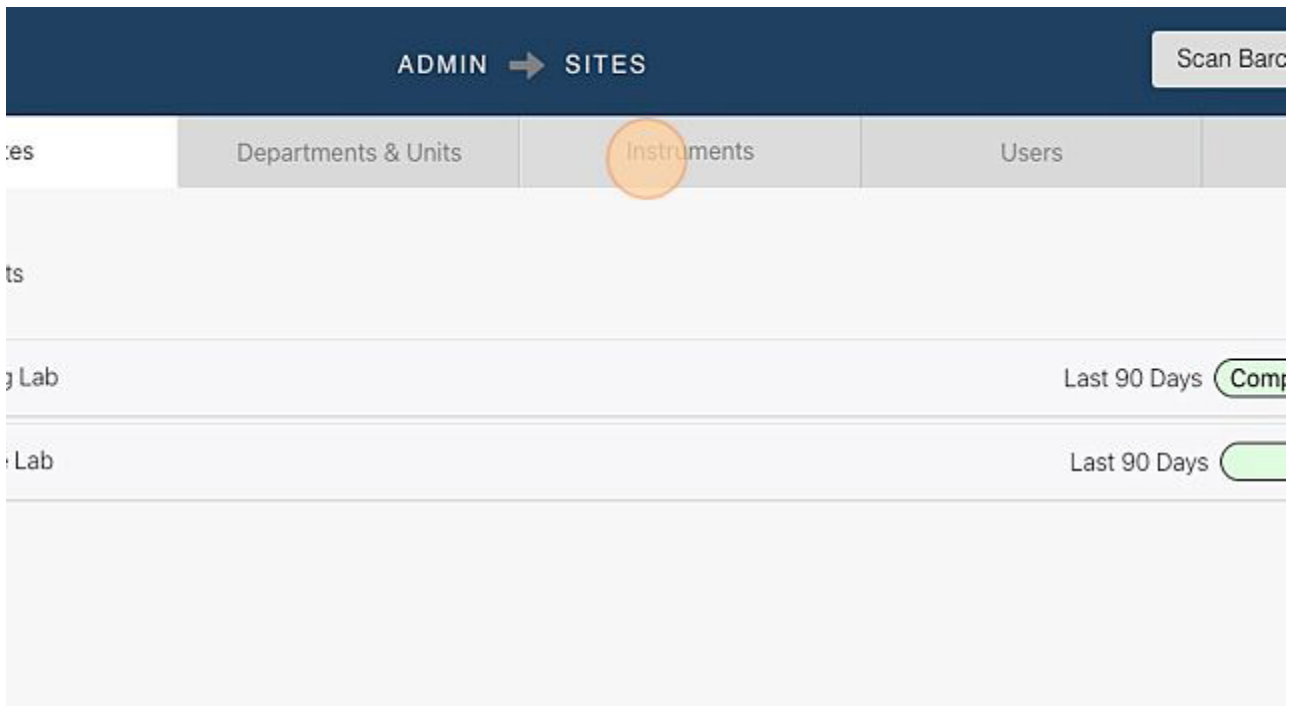
· Lab   Last 90 Days

3. Select your instrument

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

1. Refrigerator (Edit) (Clone)   Status
   Site: Training Lab   View N
   Department: Microbiology   View I
   Bench / Unit: Microbiology   Contr
   ell id: 204
   123

Last 90 Days
(No data)

Documents(0)

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

| 1 | Maintenance Task Name: Wipe Down Exterior (Edit) (Clone)   ✖ remove |

   Frequency: Daily, Lead time 3 hrs, Overdue after 5 hrs

   Fixed Schedule: NO

   Tags: Enter a new tag

   Affects Compliance: YES

   ✚ Add Maintenance Task

Finish   Cancel

6. Complete the form

Add Maintenance Task

Edit Instru

✔ Instrum
Name:

Manufa

Model #

✔ Control

＋ A

Maintenance Task | Enter Maintenance Task

Example: Run Level 1 QC

Notes (Optional) | * Maximum 5000 characters allowed

B *I* U S   H₁ H₂   ≣ ≣   X₂ X²   ≣ ≣   ¶

Normal ↕   Normal ↕   A Ａ   Sans Serif ↕   ≡

Tₓ   🔗

Enter Notes here...

Frequency |

7. Select "Save Task"

HH : MM

Repeats Every

Compliance

to
eagents

-- None --

ng a Task to a Controls/Reagents prompts the user to update the Acceptable Values whenever the Lot changes

Data Field

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.

Tags: Enter a new tag

Affects Compliance: YES

2   Maintenance Task Name: Wipe Down Exterior   (Edit) (Clone)   ✖ remove

Frequency: Daily, Lead time 3 hrs, Overdue after 5 hrs

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

➕ Add Maintenance Task

9. Select "Finish" when you are finished

2   Maintenance Task Name: Wipe Down Exterior   (Edit) (Clone)   ✖ remove

Frequency: Weekly, Lead time 24 hrs, Overdue after 24 hrs

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

➕ Add Maintenance Task

Finish   Cancel
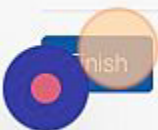
Edit an Existing Maintenance Task

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
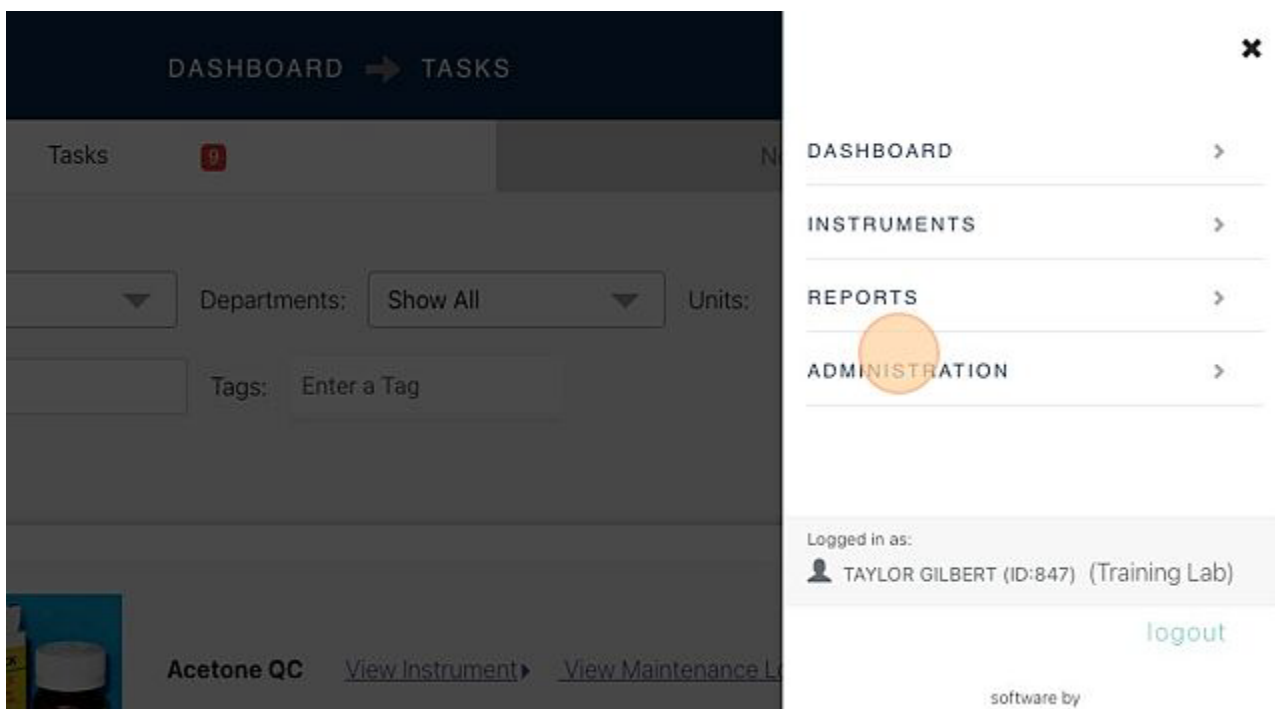
2. Select the "Instruments" tab

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)

1. Freezer 1 (Edit) (Clone)
   Site: Training Lab
   Department: Chemistry
   Bench / Unit: Chemistry
   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

\+ Add Controls/Reagents Requirement

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:

6. Make the necessary changes

7. Select "Save Task"

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

9. Be sure to select "Finish" when finished

Frequency: Every 6 Months, Lead time 168 hrs, Overdue after 168 hrs

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

Data Fields:

Attach Certification   File Attachment

+ Add Maintenance Task

Finish   Cancel

Note for Step 5:

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

1. Go to "Reports" from the Menu
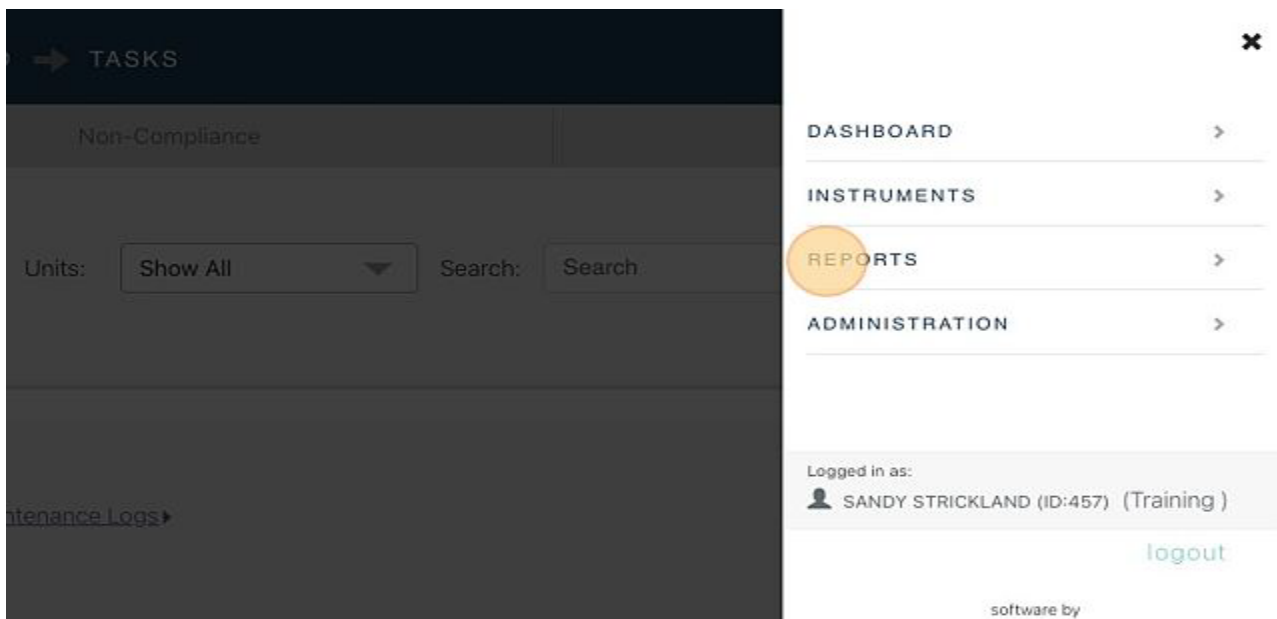
2. Select "Maintenance Logs" on the left side of the screen

3. Apply any needed filters to locate the instrument
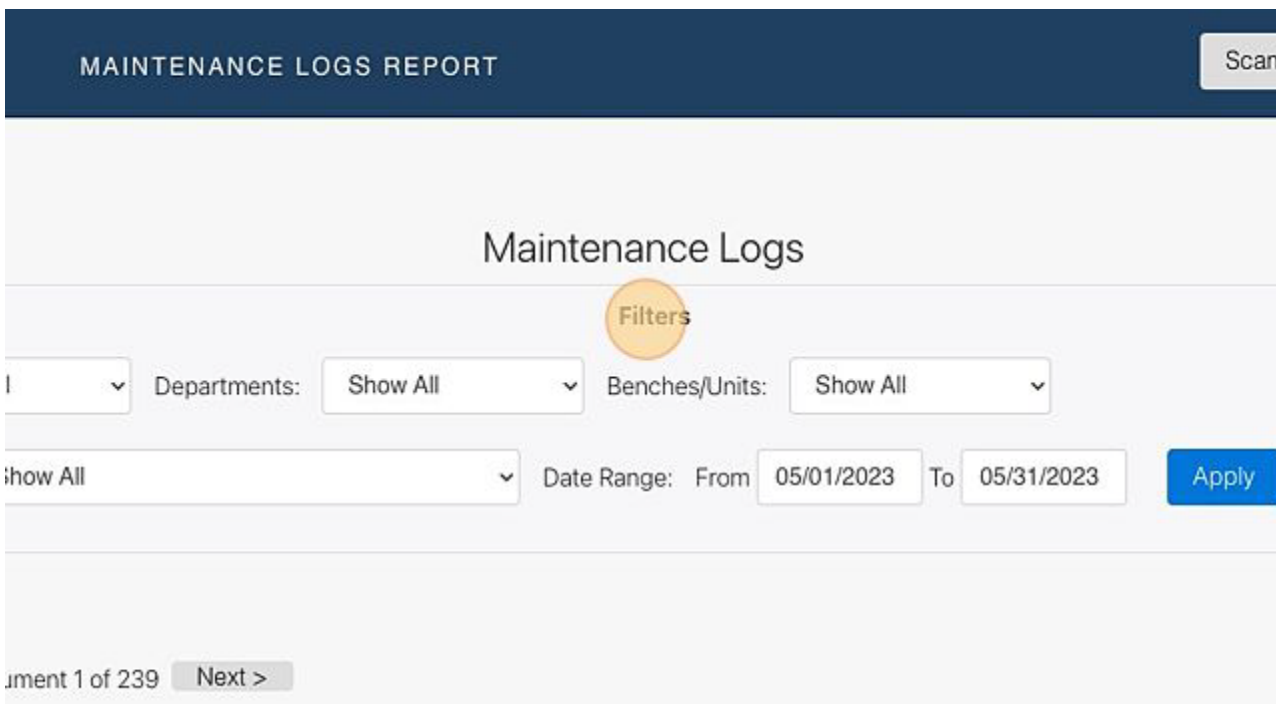
When a Maintenance Task is updated it does not lose it's previous data. All data is maintained within the system. Therefore, a visual indicator has been given to signify a change has been made.

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.

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 Details   ✕

Change Log :
Instrument Type : Clinitek® Advantus
Created : April 26, 2022 10:15 AM EST 👤
Updated By : Dec 30, 2022 01:16 PM EST 👤 Joann Wilson (ID:387)

Maintenence Task Name: Daily Tasks

Fixed Schedule :   YES

Fixed Schedule Hours: 24 Hours Start Time 08:00 AM

Affects Compliance : YES

Data Fields :

Field	Field Type	Validate Field
Visual alignemnt of strips (View Chart)	defined	(acceptable: Pass)
Software Check by rebooting system (View Chart)	defined	(acceptable: Pass)
Barcode Check (View Chart)	defined	(acceptable: Pass)
Print Successful Calibration (View Chart)	defined	(acceptable: Pass)
Daily Maintenance	defined	(acceptable: Complete)

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 Details   ✕

Change Log :
Instrument Type : Clinitek® Advantus
Created : Dec 30, 2022 01:16 PM EST 👤 Joann Wilson (ID:387)

Maintenence Task Name: Daily Tasks

Fixed Schedule :   YES

Fixed Schedule Hours: 24 Hours Start Time 12:00 AM

Affects Compliance : YES

Data Fields :

Field	Field Type	Validate Field
Visual alignemnt of strips (View Chart)	defined	(acceptable: Pass)
Software Check by rebooting system (View Chart)	defined	(acceptable: Pass)
Barcode Check (View Chart)	defined	(acceptable: Pass)
Print Successful Calibration (View Chart)	defined	(acceptable: Pass)
Daily Maintenance	defined	(acceptable: Complete)

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
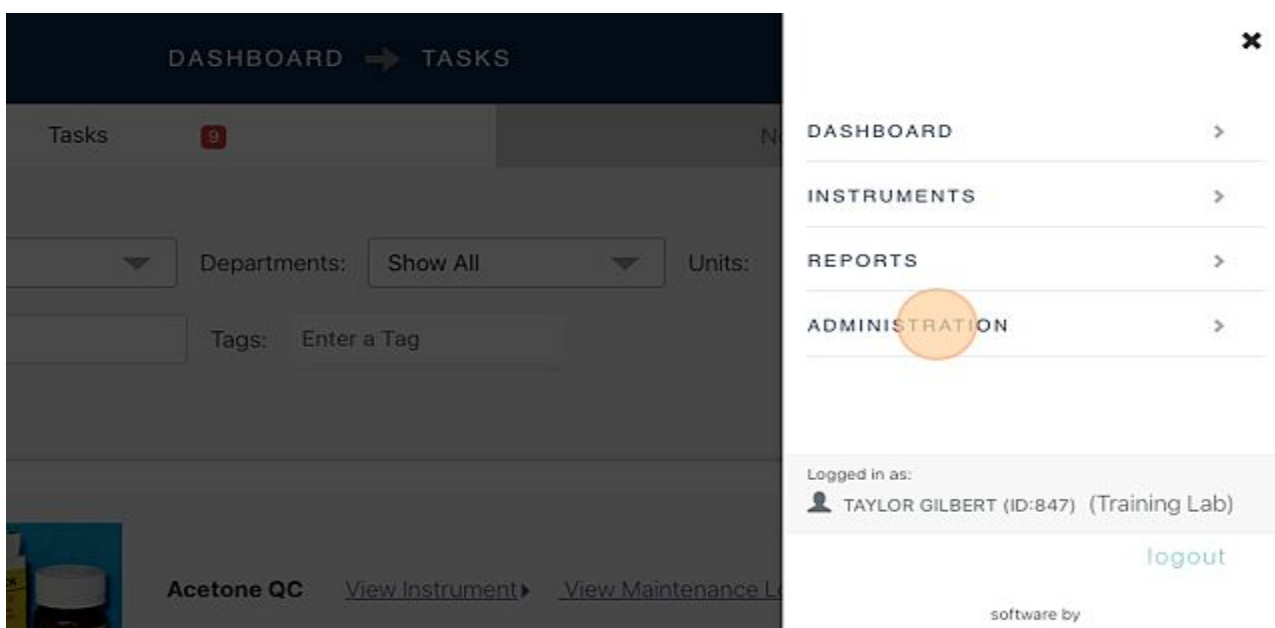
2. Select the "Instruments" tab

| Departments & Units | Instruments | Users | System |

＋ Add

ib   Last 90 Days Compliance | 100%

b   Last 90 Days   No data

3. Select your instrument

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

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

Instruments : 7

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 (Edit) (Clone)   Status : Online
Site: Training Lab
Department: Microbiology   View Maintenance Logs
Bench / Unit: Microbiology   View Instrument ▸
ell id: 203   Controls/Reagents ▸
123456

) Days
No data

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

Requirements: None

/Reagents Requirement   New Features

Name: Record Temperature (°C) (Edit) (Clone)   ✖ remove

cy: Daily, Lead time 3 hrs, Overdue after 5 hrs

hedule: NO

nter a new tag

Compliance: YES

ds:

6. Select "Finish" when you are finished

Frequency: Once a Year, Lead time 168 hrs, Overdue after 168 hrs

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

Data Fields:

Inspection Results	Defined Value

+ Add Maintenance Task

Finish   Cancel

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

Up-to-date

Up-to-date

CO2 Incubator
Training – Microbiology – Microbiology – –

Up-to-date

DXH 900 - Jeffrey
Training – Hematology – Hematology –

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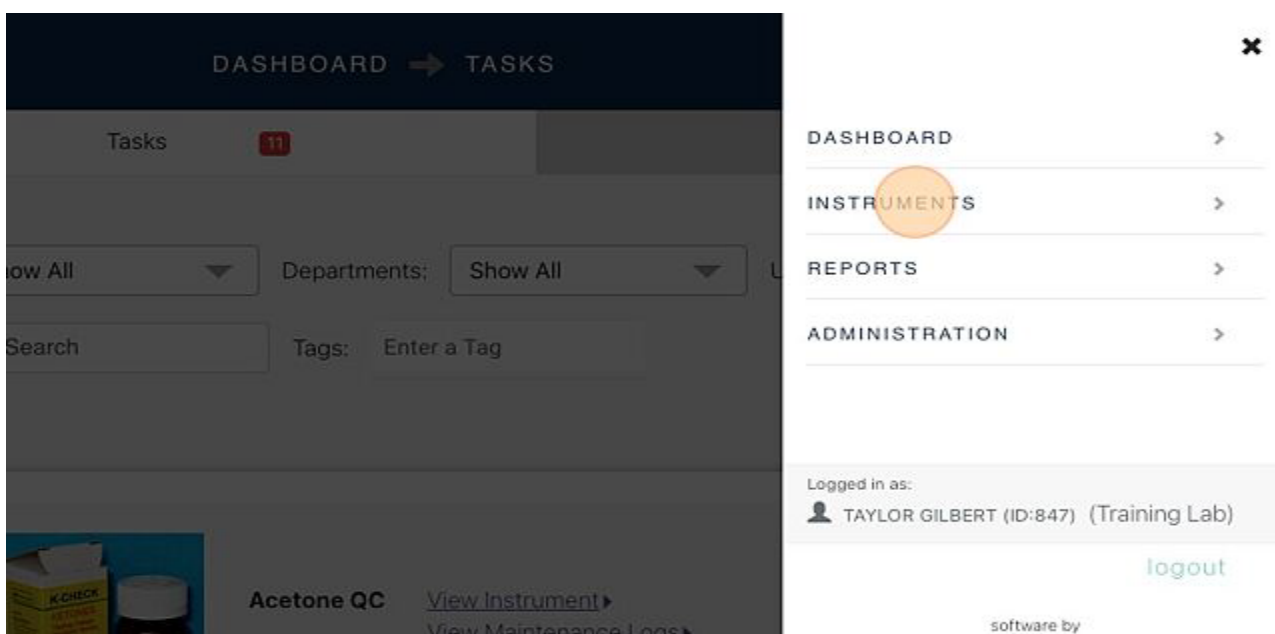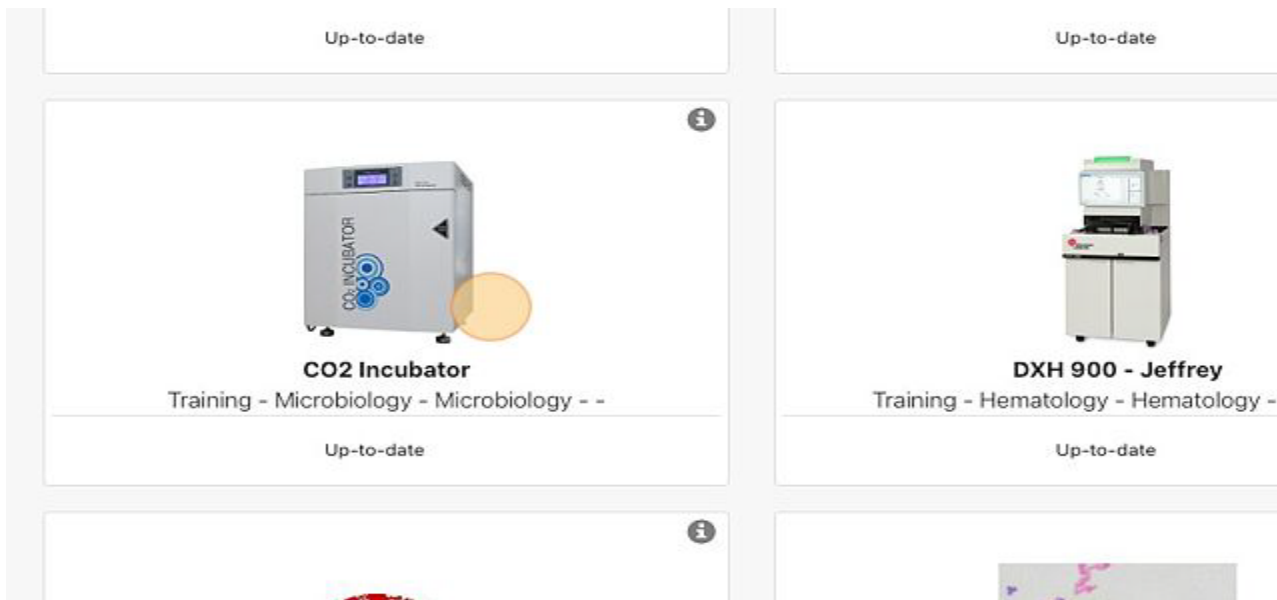
3. Select the Task you would like to delete a record from

Sort By	Status	Default	Frequency	A-Z

Tasks

1 ▶ Record CO2 Level

2 ▶ Record Temperature

3 ▶ Corrective Action

Other

▶ Custom Task
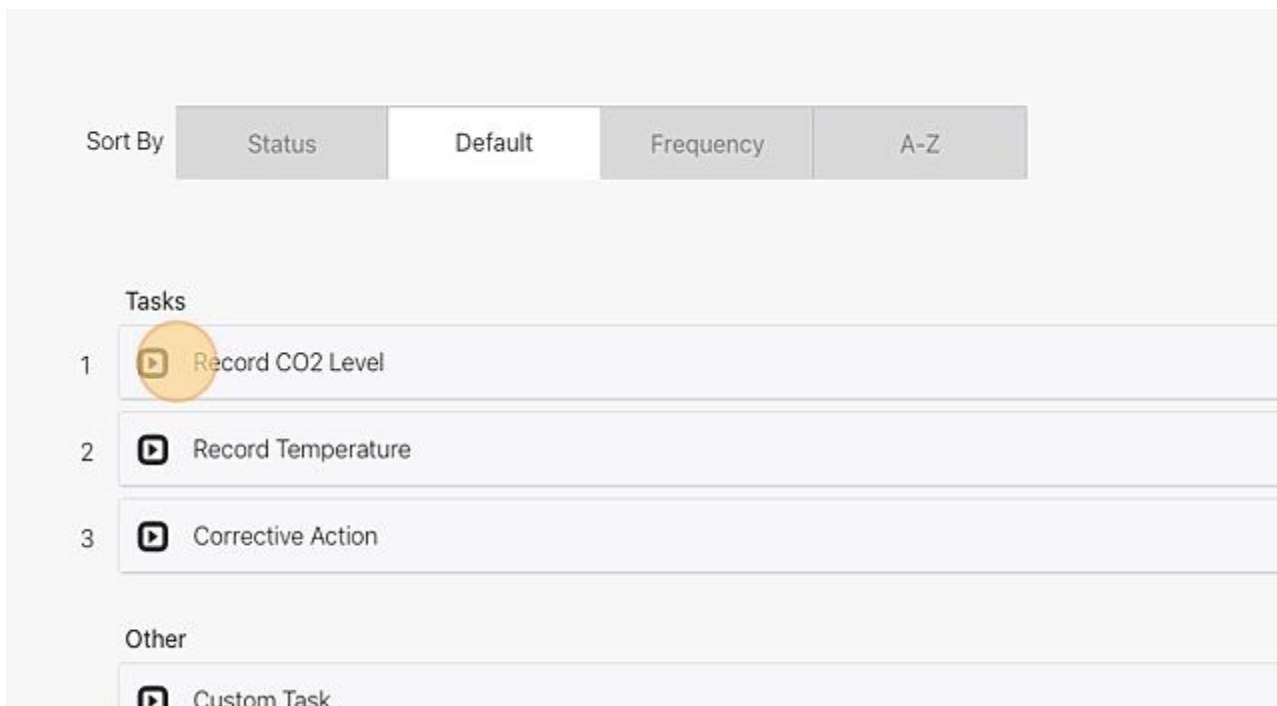
4. Select the View Details button
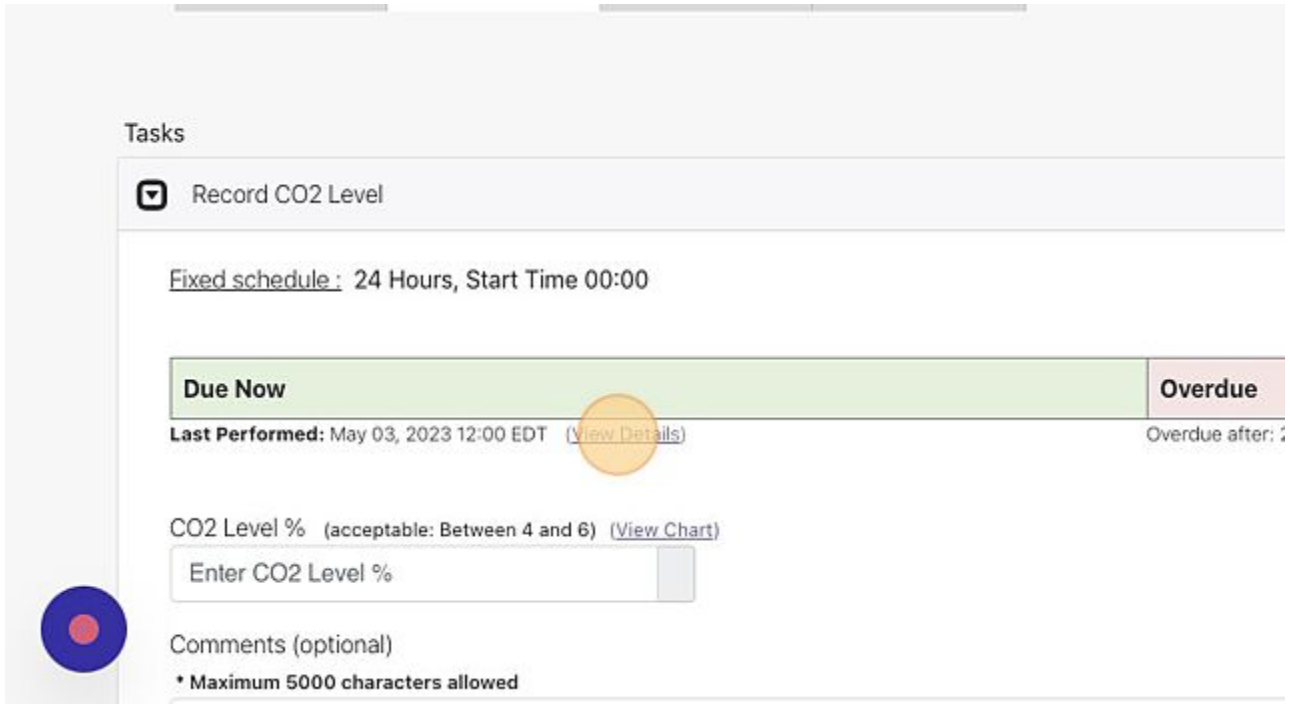
5. Select the drop down button to show the logged details
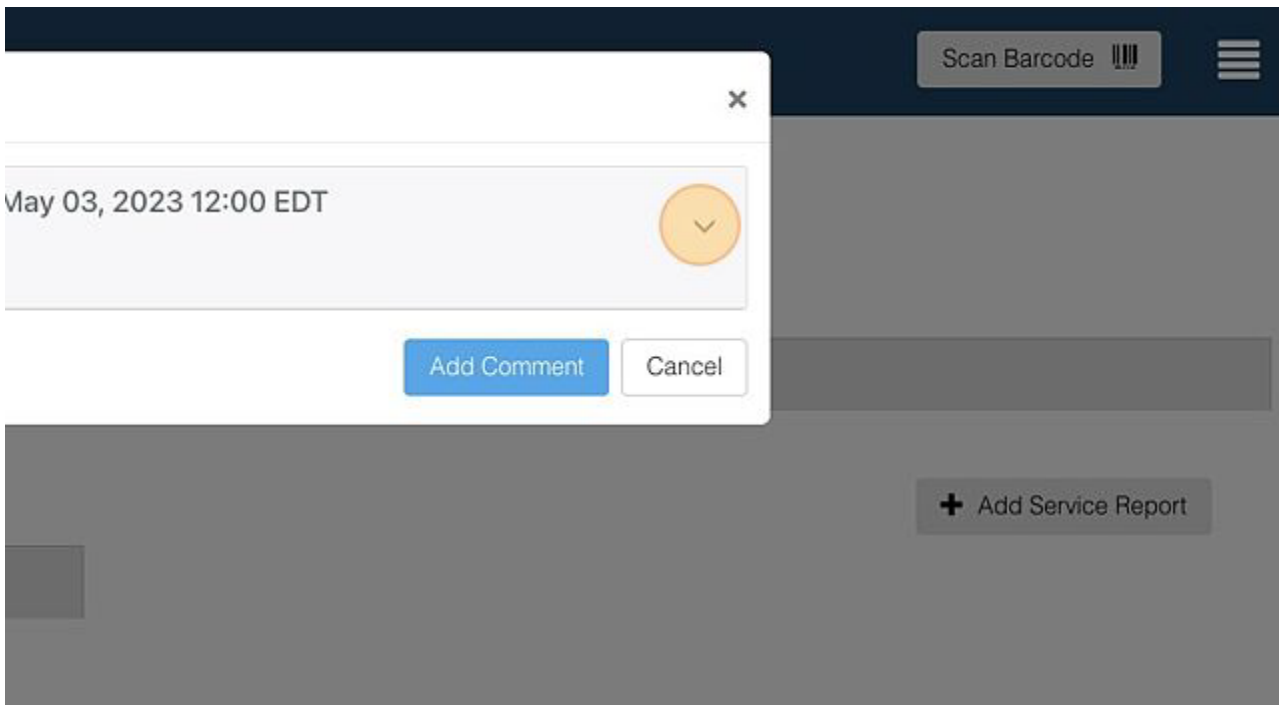
6. Select the Trash image
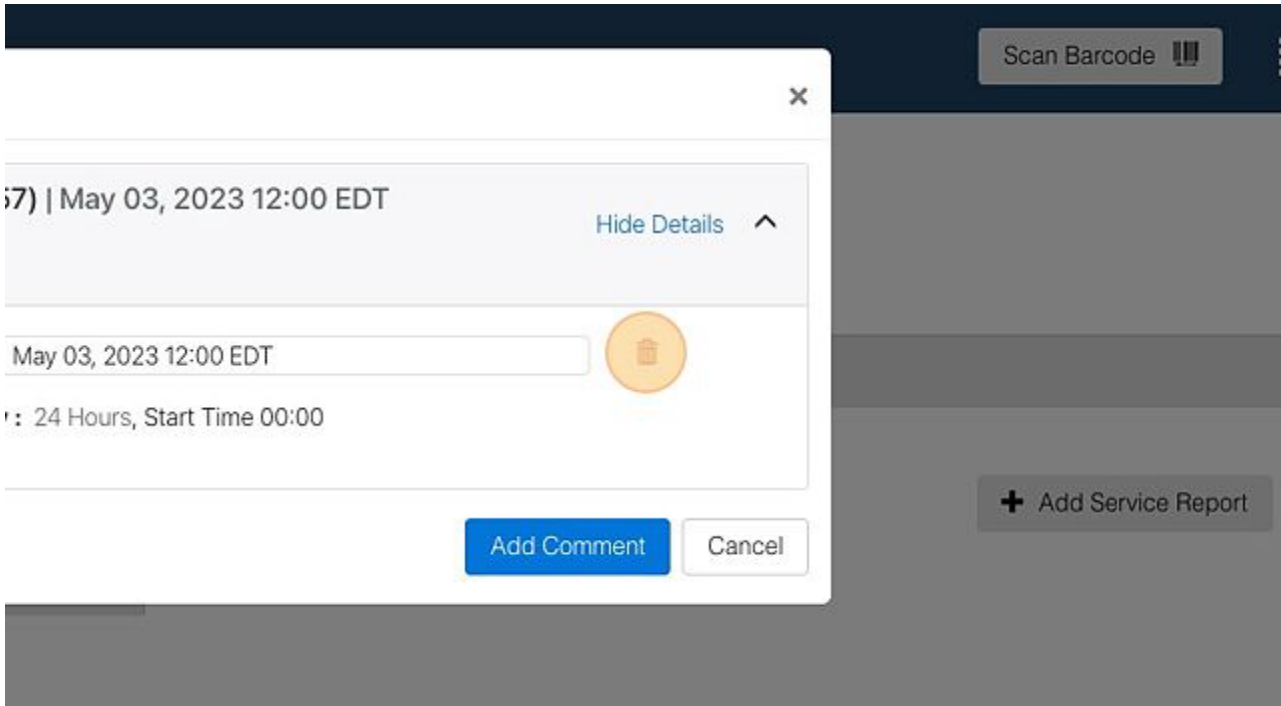
7. Enter a Reason for deleting the result
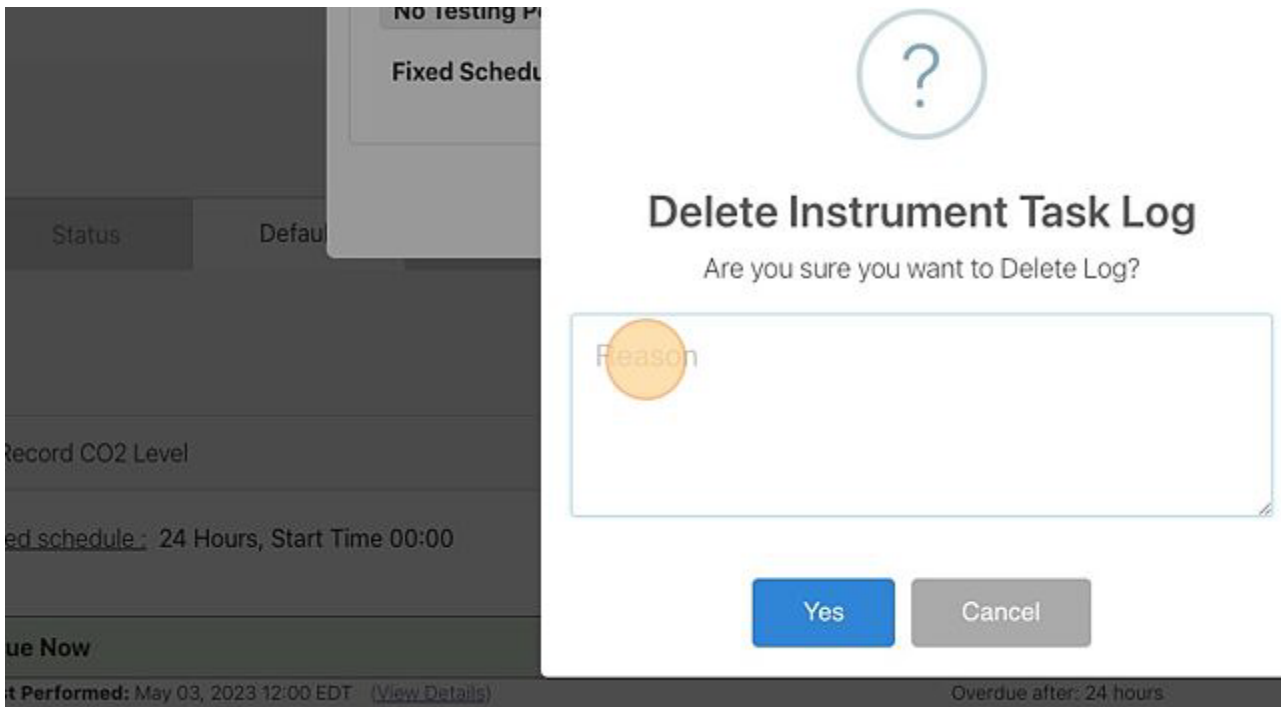
8. Select Yes

Are you sure you want to Delete Log?

Entry error. Instrument is now in use.

Hours, Start Time 00:00

Yes   Cancel

03, 2023 12:00 EDT   (View Details)   Overdue after: 24 hours

otable: Between 4 and 6)   (View Chart)

%

l)
racters allowed

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, [Add a New Instrument Type](#), then refer back to this page.

Steps to Add an Instrument and select a Bench/Unit

1. Select "Administration" from the menu
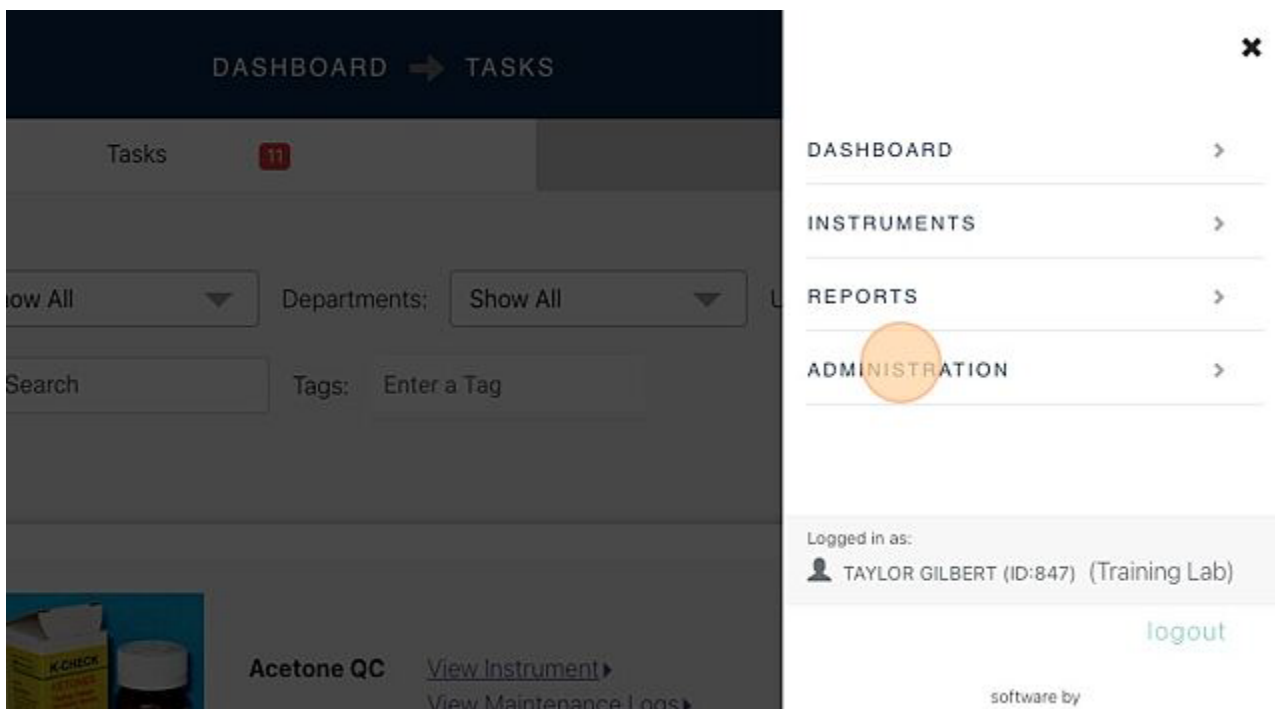
2. Select the "Instruments" tab
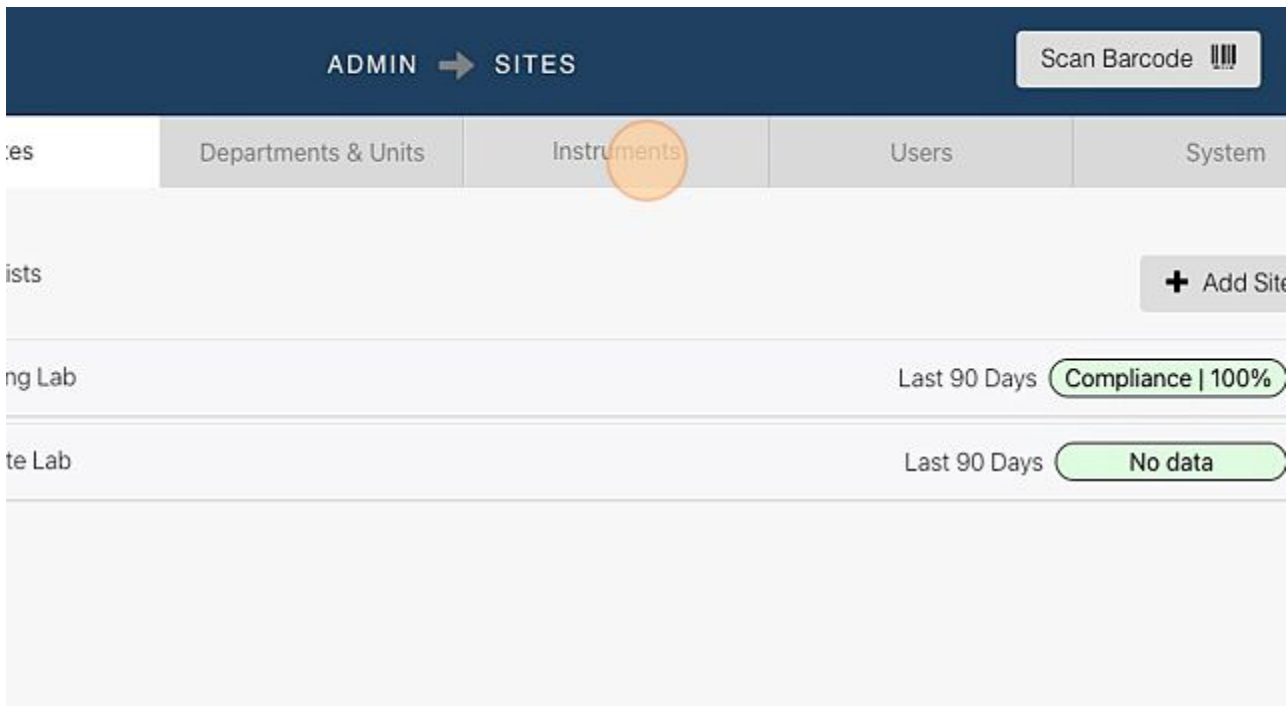
Note: All filters must be empty. *Do not select the "Show All" filter.*
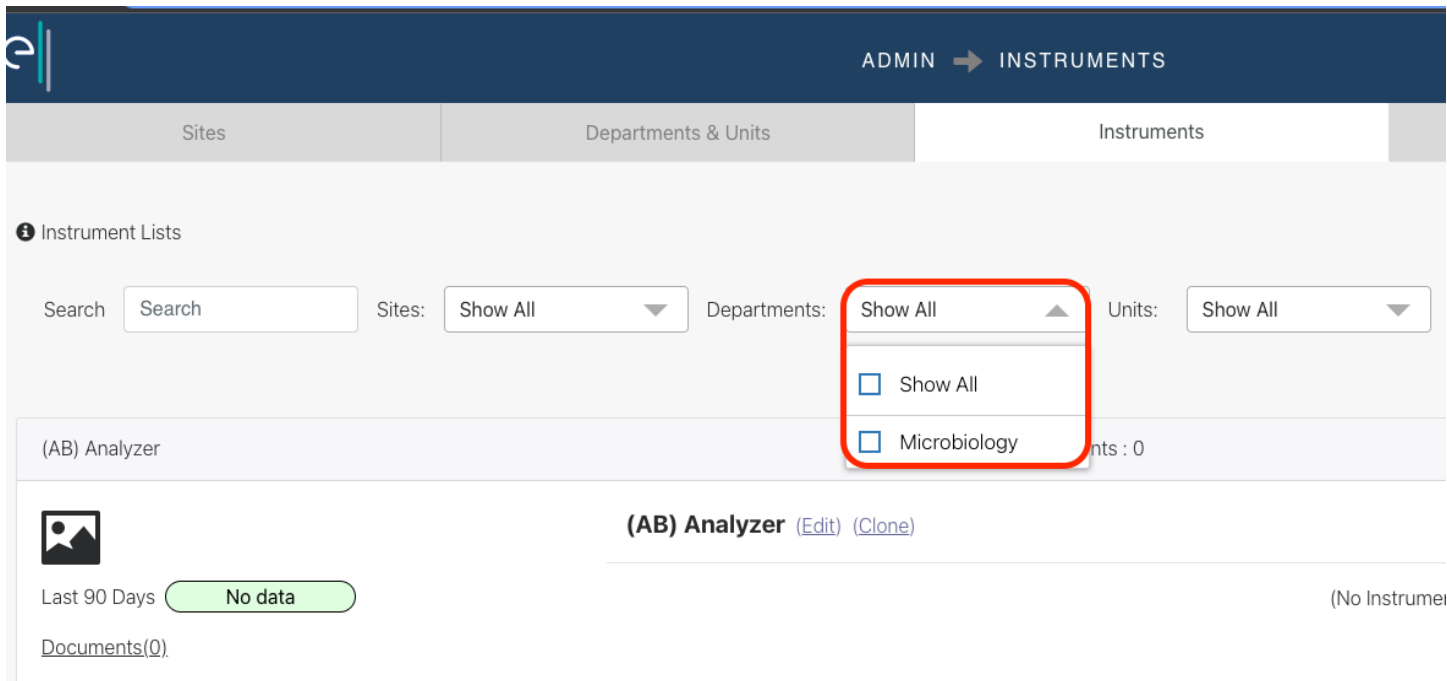
3. Search for the Instrument Type you wish to add an Instrument.

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

5. Fill out the form with all the necessary information

6. When you are finished select "Save Instrument"

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

3. Select the "Instruments" tab

Scan Barcode

| Sites | Departments & Units | Instruments | Users | S |

ℹ Site Lists

+

| Training Lab | | Last 90 Days | Compliance |
| Off Site Lab | | Last 90 Days | No dat |
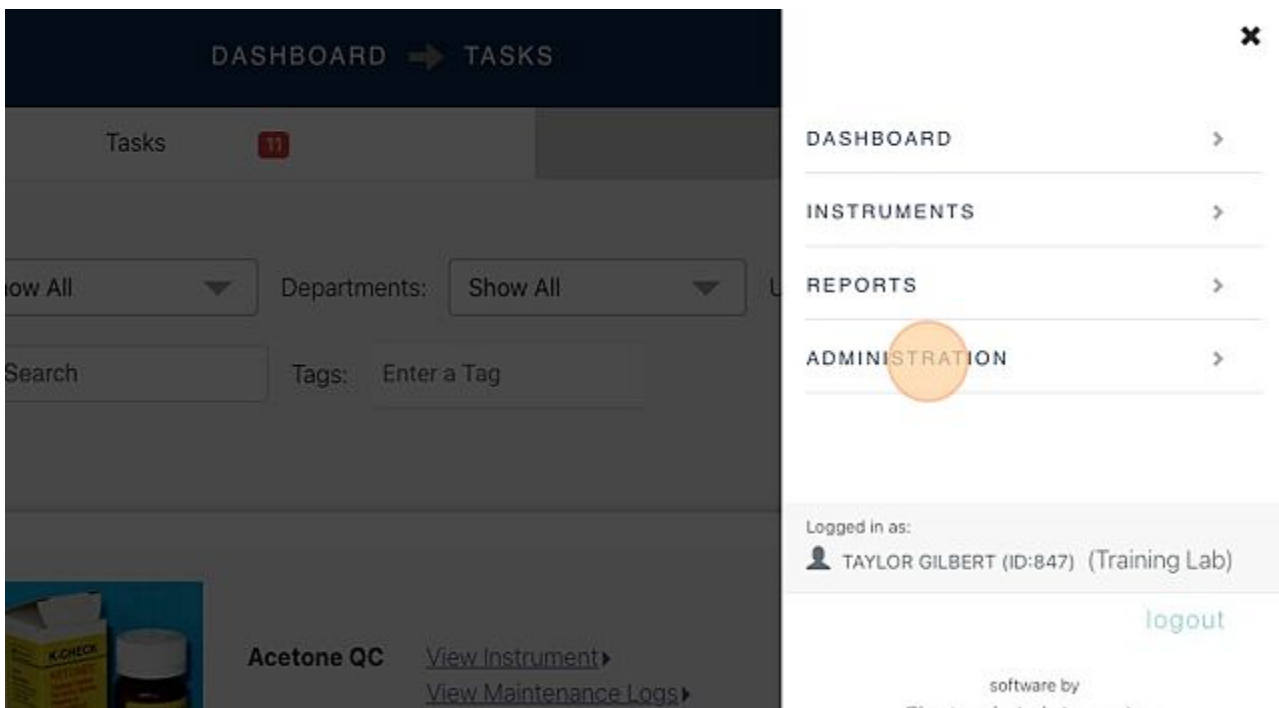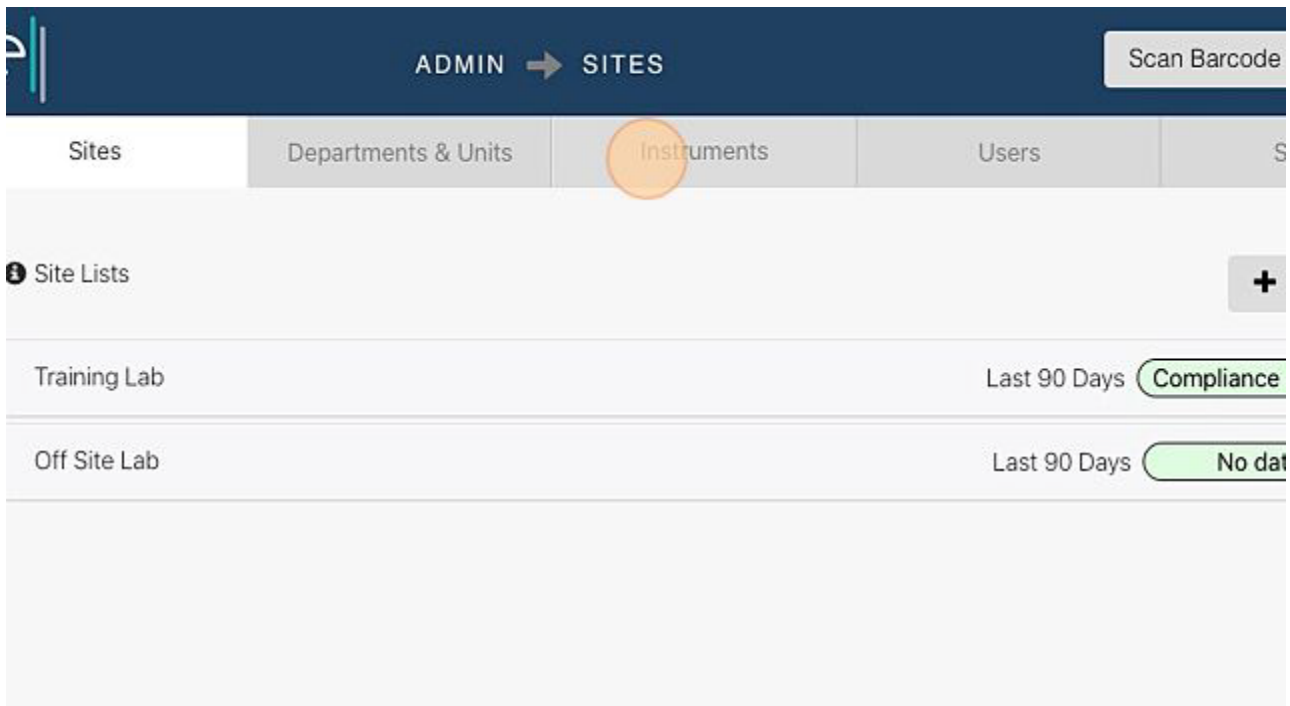
4. Select your instrument type

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
DxI 600	Instruments : 2	Last 90 Days	Compliar
Embedding Console	Instruments : 1	Last 90 Days	No
Eye Wash	Instruments : 1	Last 90 Days	No

5. Select your instrument

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

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

8. Scan your barcode

9. Select "Save Instrument" when finished
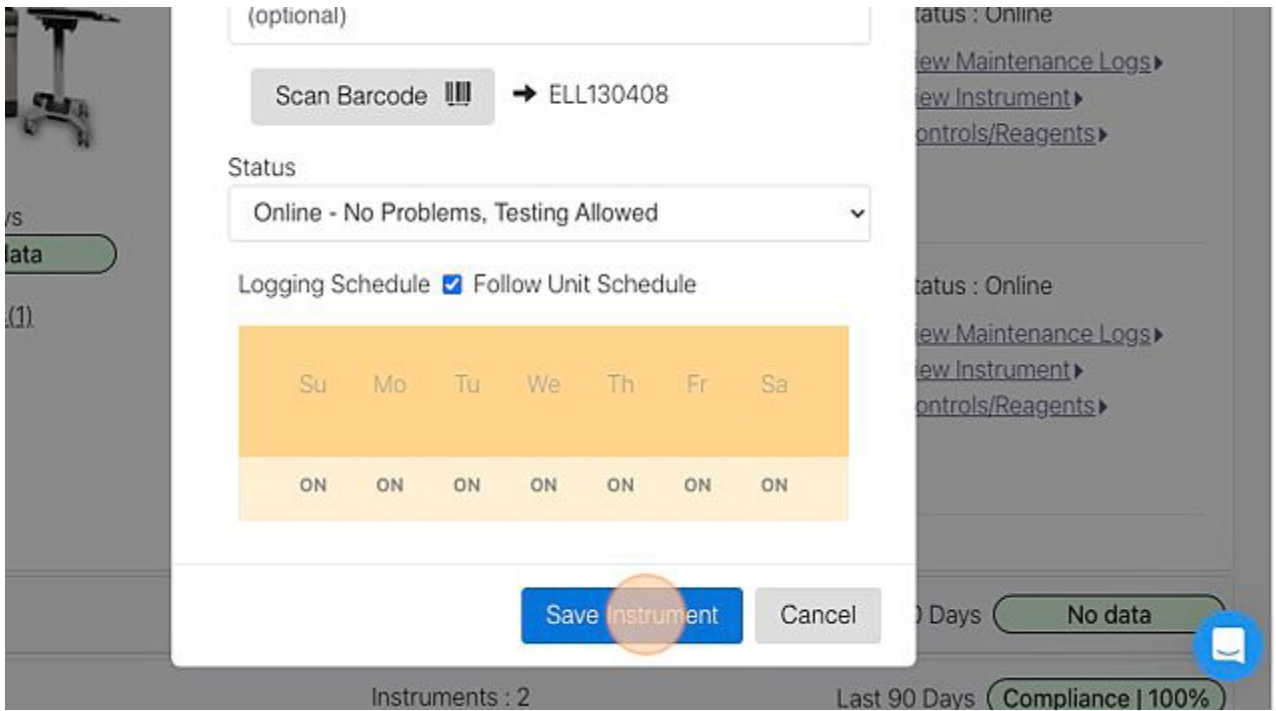
Add/Edit/Delete a Tag for a Maintenance Task

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 Add Maintenance Task prior to completing this if needed.

1. Select the Administration page from the Menu
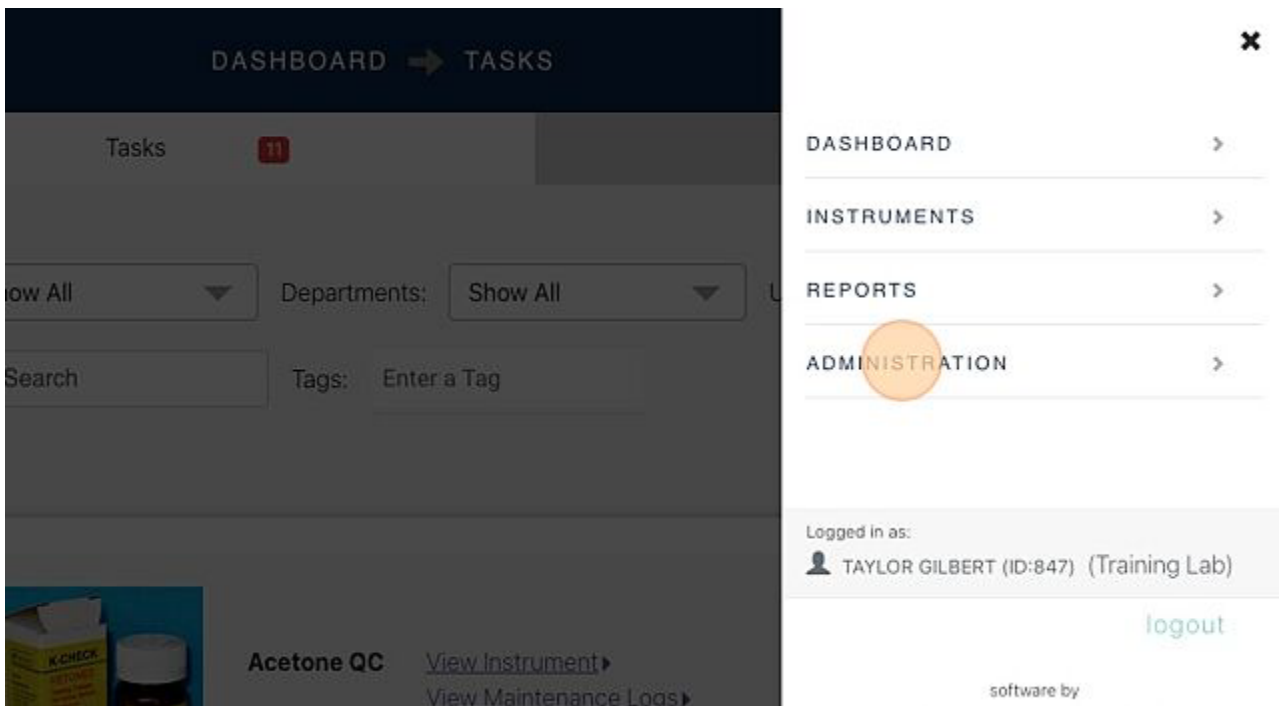
2. Select the Instruments tab
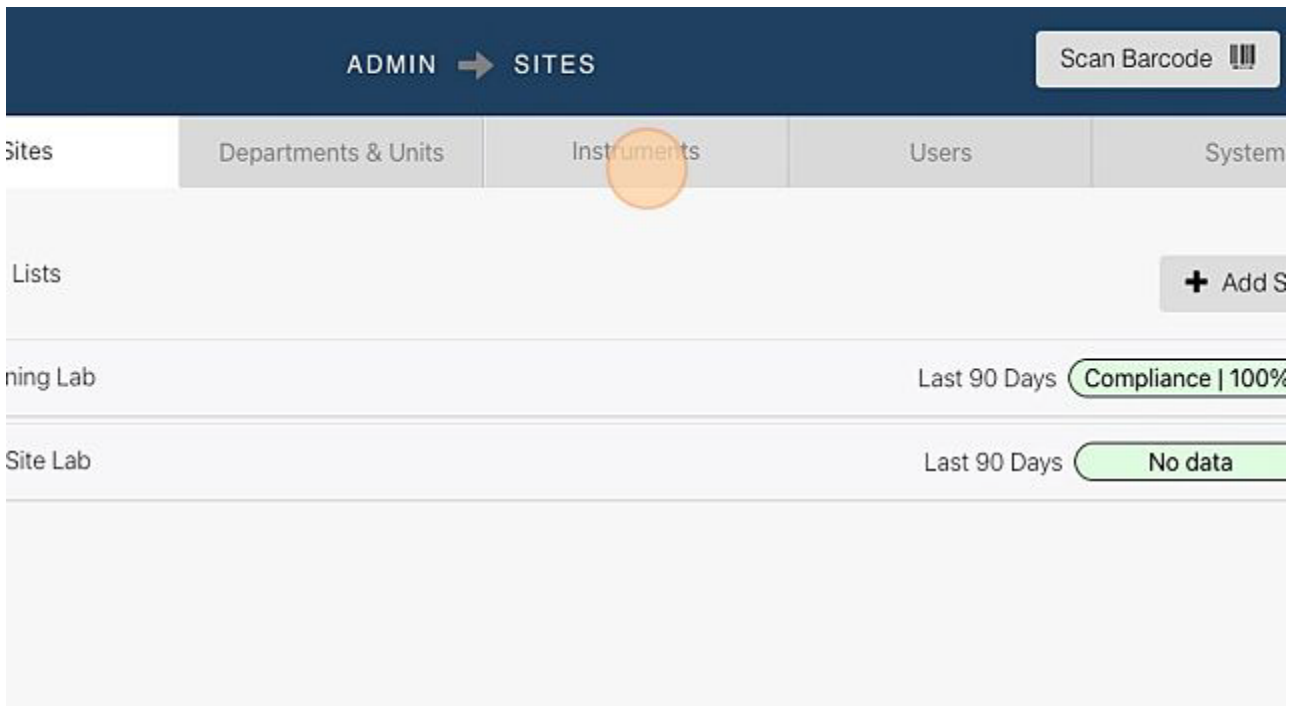
3. Select the Instrument Type
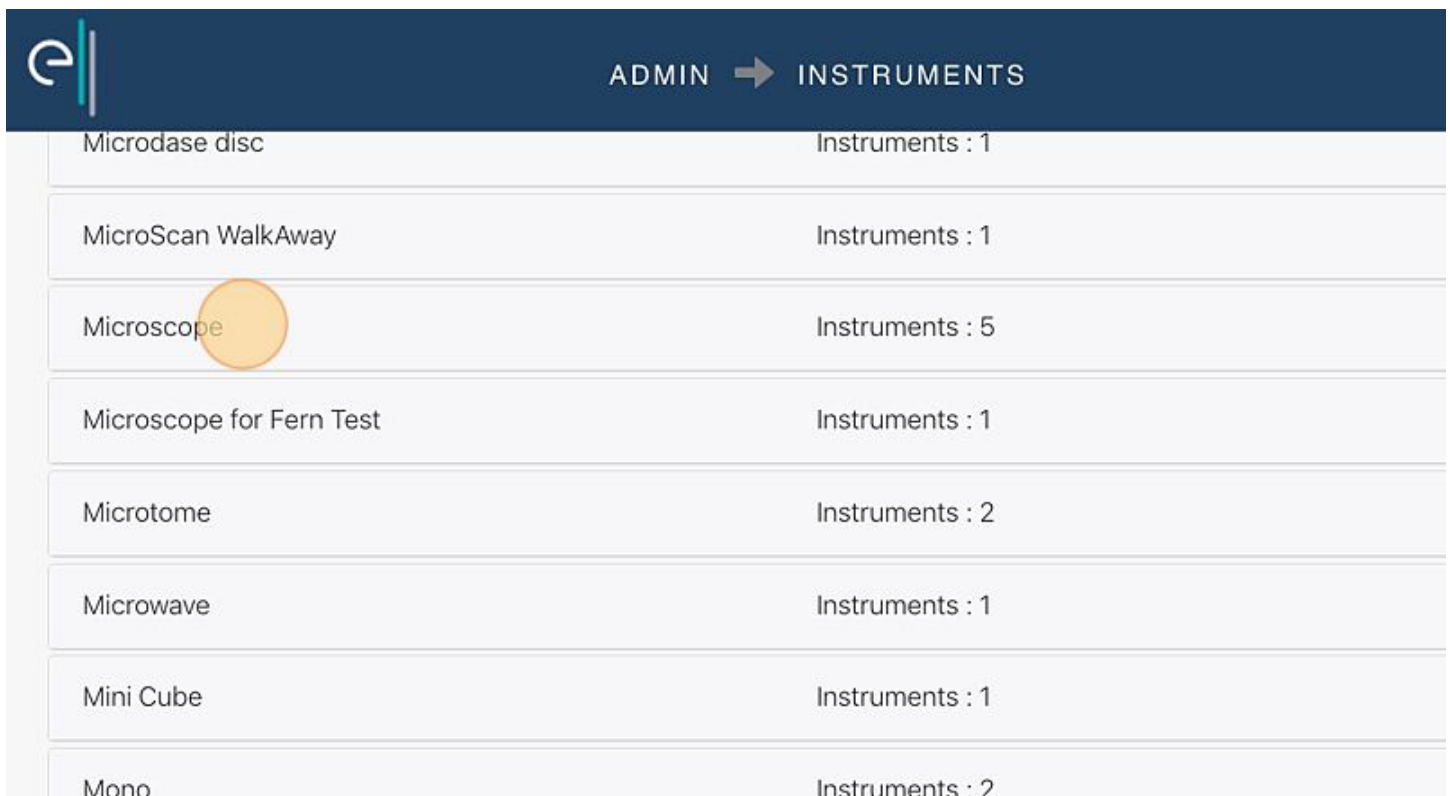
4. Select "Edit" beside the Instrument type name

Microdase disc   Instruments : 1   L

MicroScan WalkAway   Instruments : 1   L

Microscope   Instruments : 5   L

Microscope (Edit) (Clone)

1. Blood Bank Microscope (Edit) (Clone)
   Site: Training Lab
   Department: Blood Bank
   Bench / Unit: Blood Bank
   ell id: 178
   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)   ✖ remove

   Fixed Schedule: YES

   Schedule Hours: 24 Hours   07:00

   Tags: Enter a new tag

   Affects Compliance: YES

2 Maintenance Task Name: test (Edit) (Clone)   ✖ remove

   Frequency: 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

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

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

Affects Compliance: YES

2 Maintenance Task Name: test (Edit) (Clone) ✕ remove

Frequency: Unscheduled

Fixed Schedule: NO

Tags: Enter a new tag

Affects Compliance: YES

➕ Add Maintenance Task

Finish Cancel

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

Sort By | Status | Default | Frequency | A-Z

Tasks

▾ Perform Alignment of Microscope

Fixed schedule : 24 Hours, Start Time 07:00

Tags: 1st Shift

Comments (optional)
* Maximum 5000 characters allowed

Enter Comments

Completed By: Sandy Strickland (ID: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 [Add an Instrument to a Bench/Unit](#) prior to completing this if needed.

1. Select the Administration page from the Menu.

2. Select the Instruments Page.

ADMIN → SITES

Scan Barcode

Sites	Departments & Units	Instruments	Users	Syst

Site Lists

+ Ad

Training Lab   Last 90 Days Compliance | 10

Off Site Lab   Last 90 Days   No data
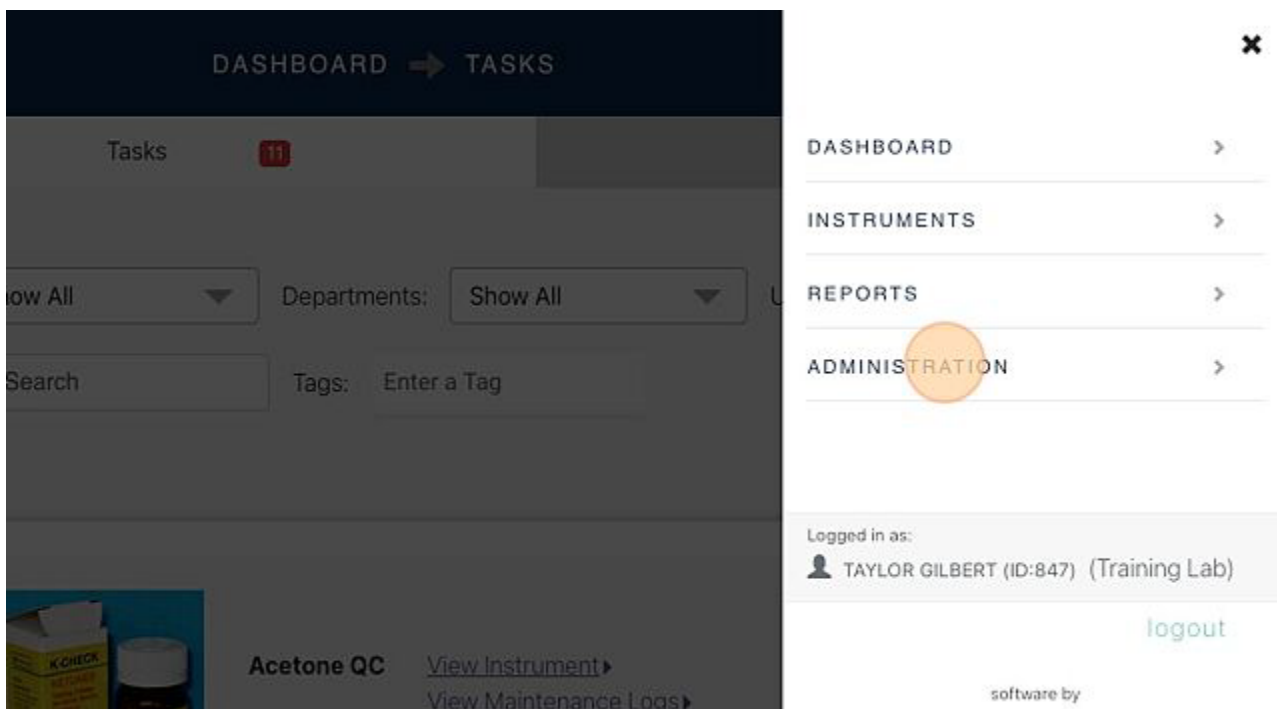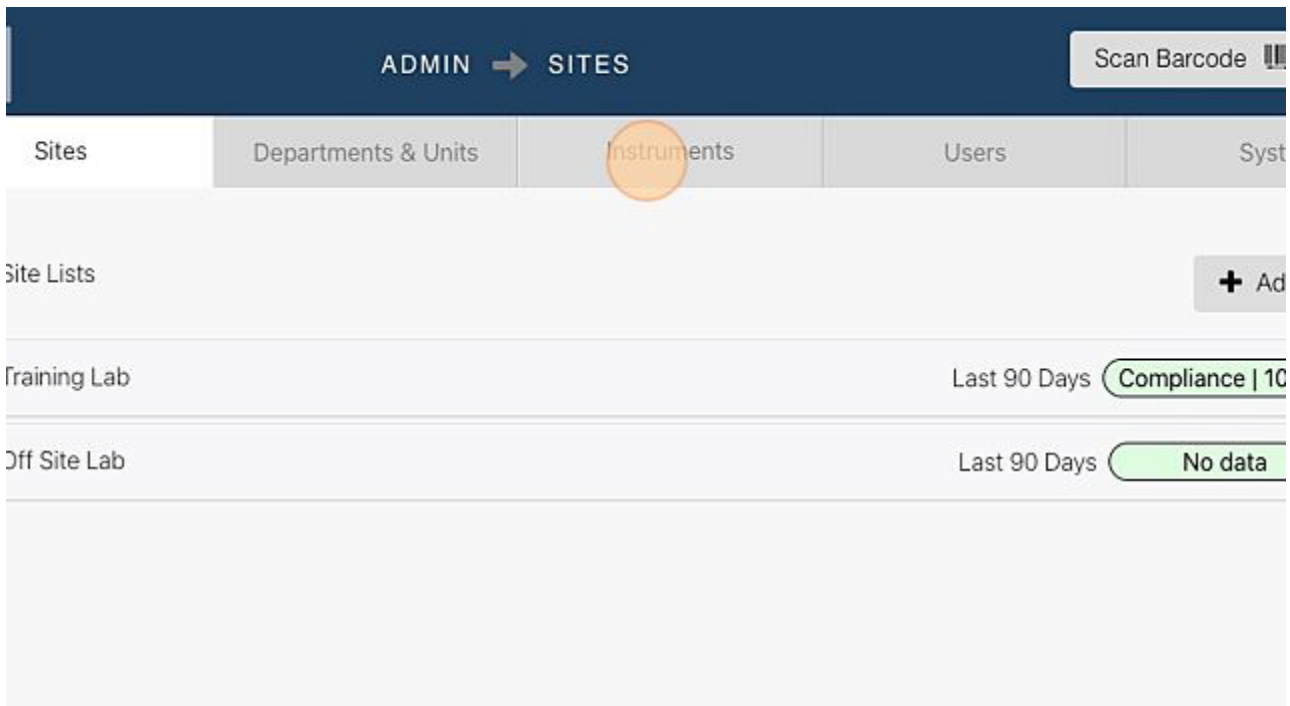
3. Select the Instrument Type to expand the panel.

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	Compliar
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.

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 Instrumen**

1. Micro 1 Incubator (Edit) (Clone)
   Site: Training Lab
   Department: Microbiology
   Bench / Unit: Microbiology
   ell id: 123
   42468375

Status : Online
View Maintenance Lo
View Instrument ▸
Controls/Reagents ▸

Last 90 Days
No data

Documents(0)

5. Enter the Tag Name.

Immucor

Incubator (37 +-2.5)

Last 90 Days
No data

Documents(0)

Incubator (37 +-2.5) (ILC02

Instrument Laber

Micro 1 Incubator

Example: EPOC Patient Room 101

Serial Number

42468375

Example: 3230-48R031

Tags

Enter a new tag

Date of Purchase

(optional)

Cost

Enter Instrument Cost

Depreciation Date

(optional)

Days (Compliar

Days (No

+ Add Instrur

tatus : Online

iew Maintenance
iew Instrument ▸
ontrols/Reagents

Days (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.
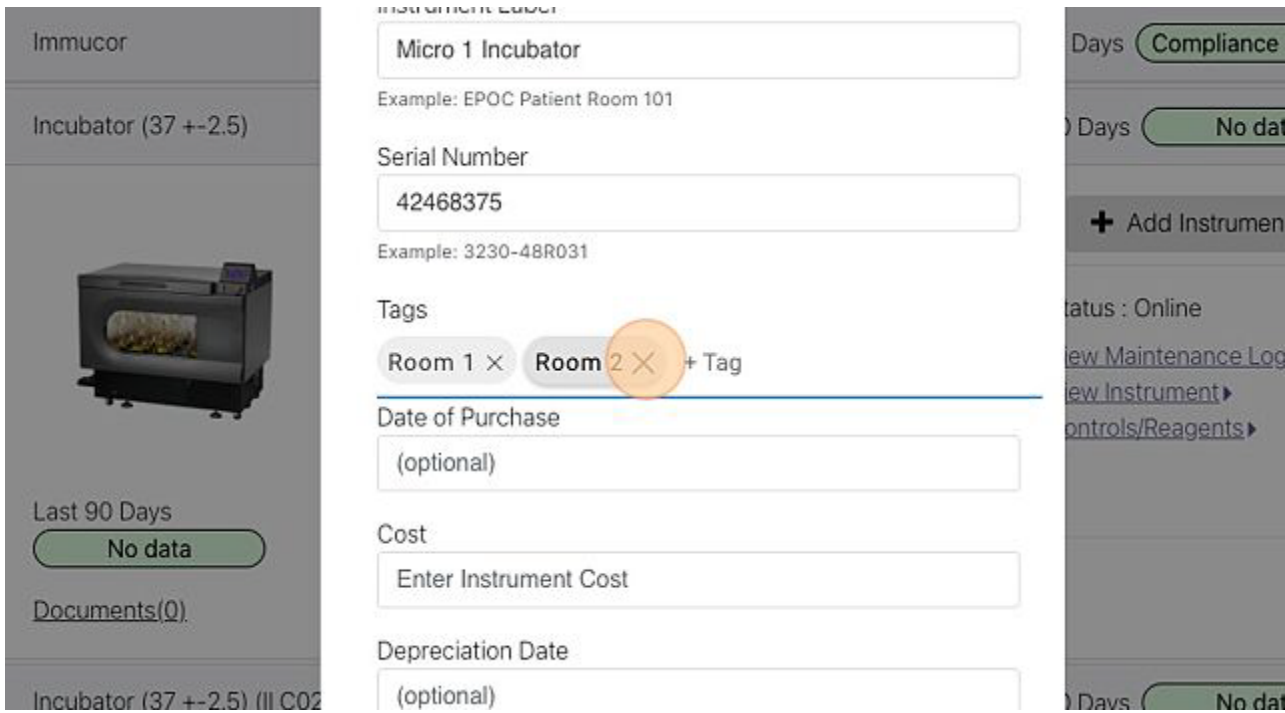
9. Scroll to the bottom of the page and select Save Instrument.
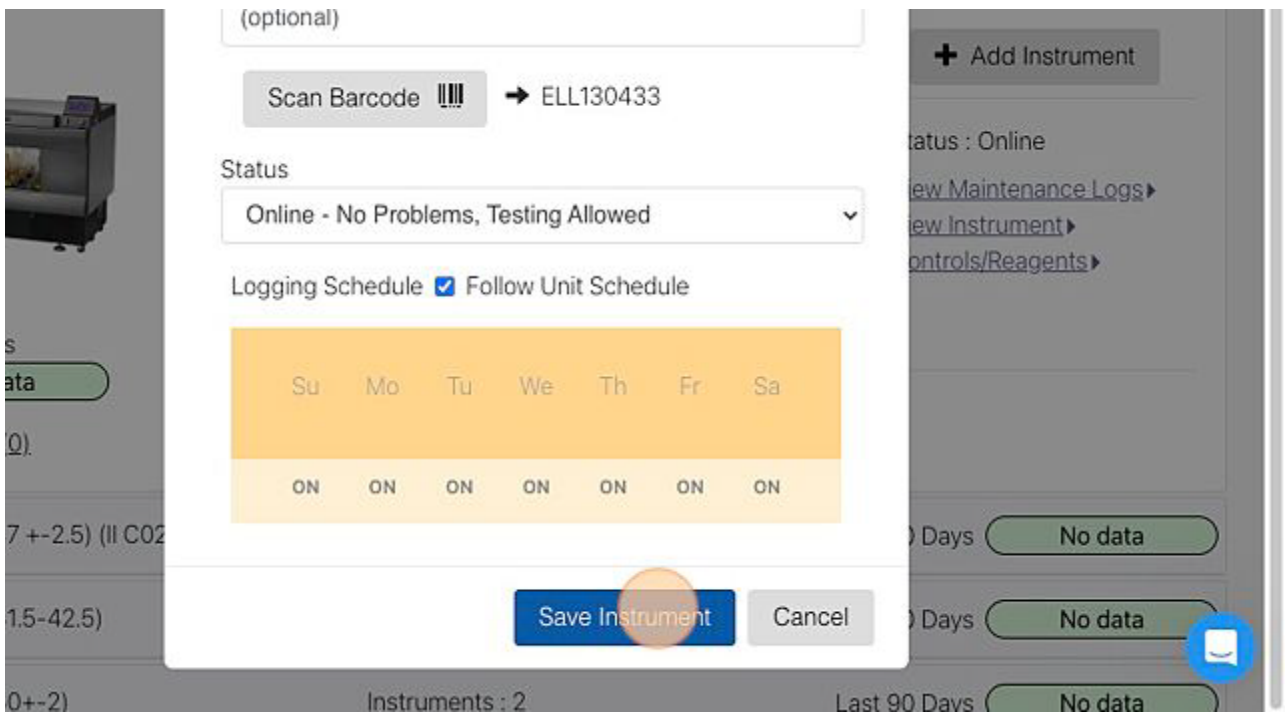
The tag can now be viewed on the user side on the Instruments page.

Incubator 1

ing Lab - Microbiology - Microbiology - 123456

Up-to-date

Micro 1 Incubator

Training Lab - Microbiology - Microbiology - 42468375

Tags: Room 1

Up-to-date

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 [Sign Off on a Monthly Report](). 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:

1. Go to the Signatures tab
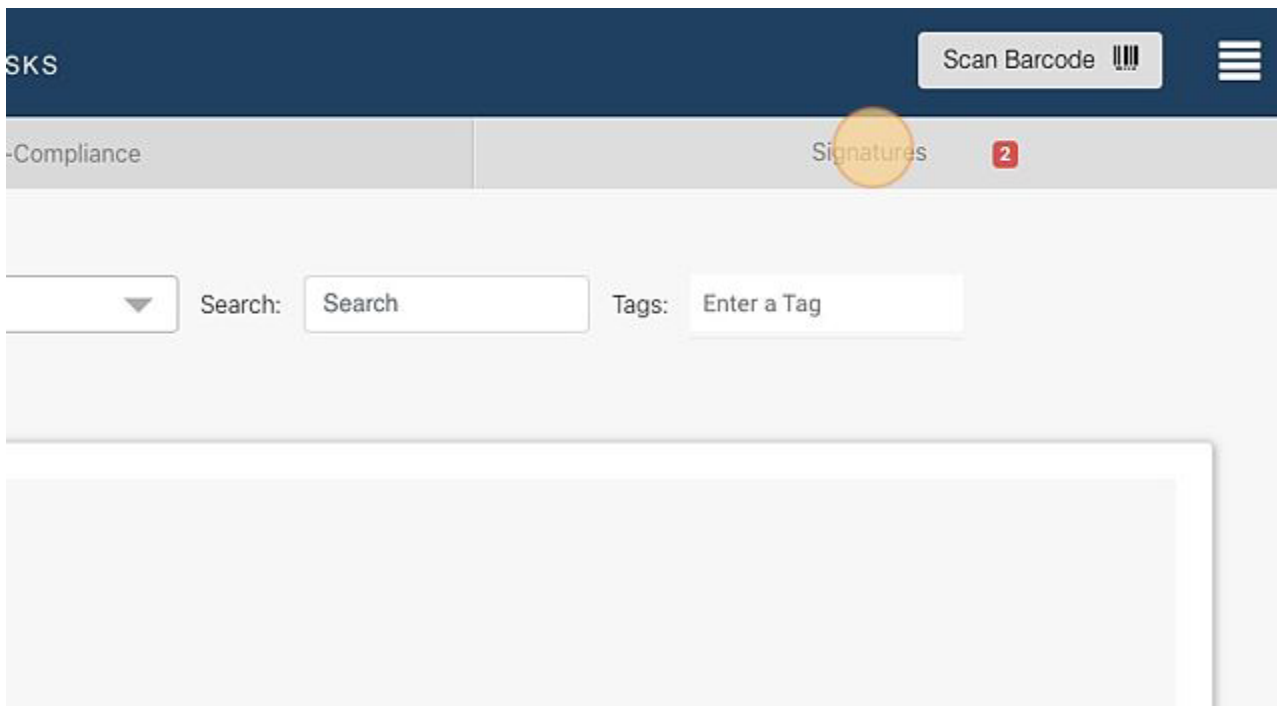
2. Select "View Now" for the needed report

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

4. Select "Add File"

Attachments
(Chemistry - March 2023)
Site : Satellite 2
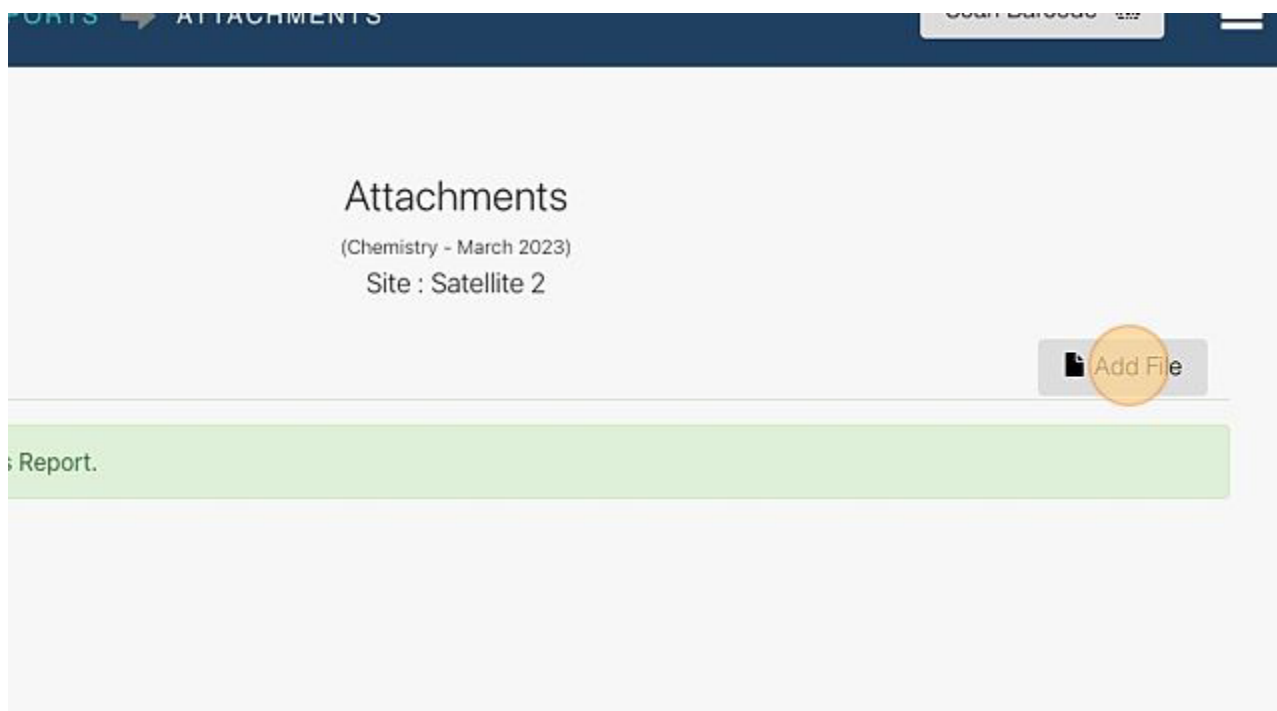
Add File

Report.

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

Scan Barcode

nents   ✕

Add File
Note : Maximum size of a single document is 20MB

is Report.

Add File

Save   Cancel
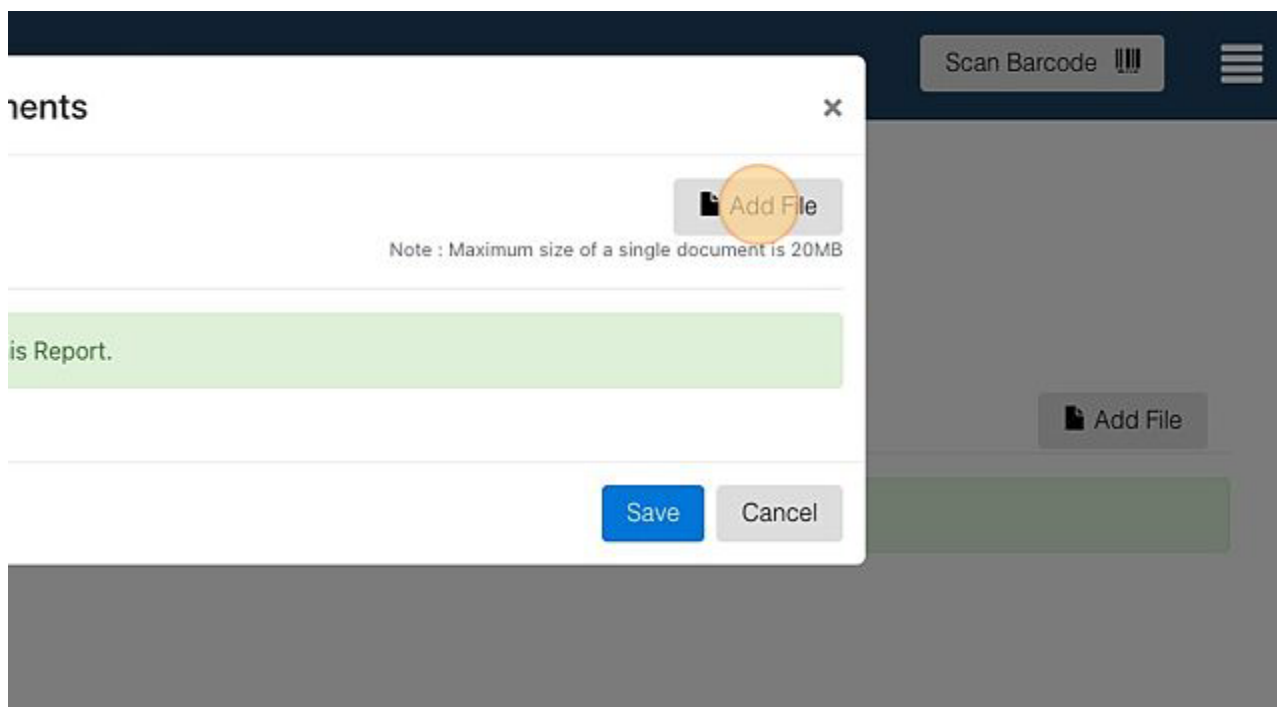
6. Select the file from your computer

7. Select Save

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:

1. Select the "Signatures tab"
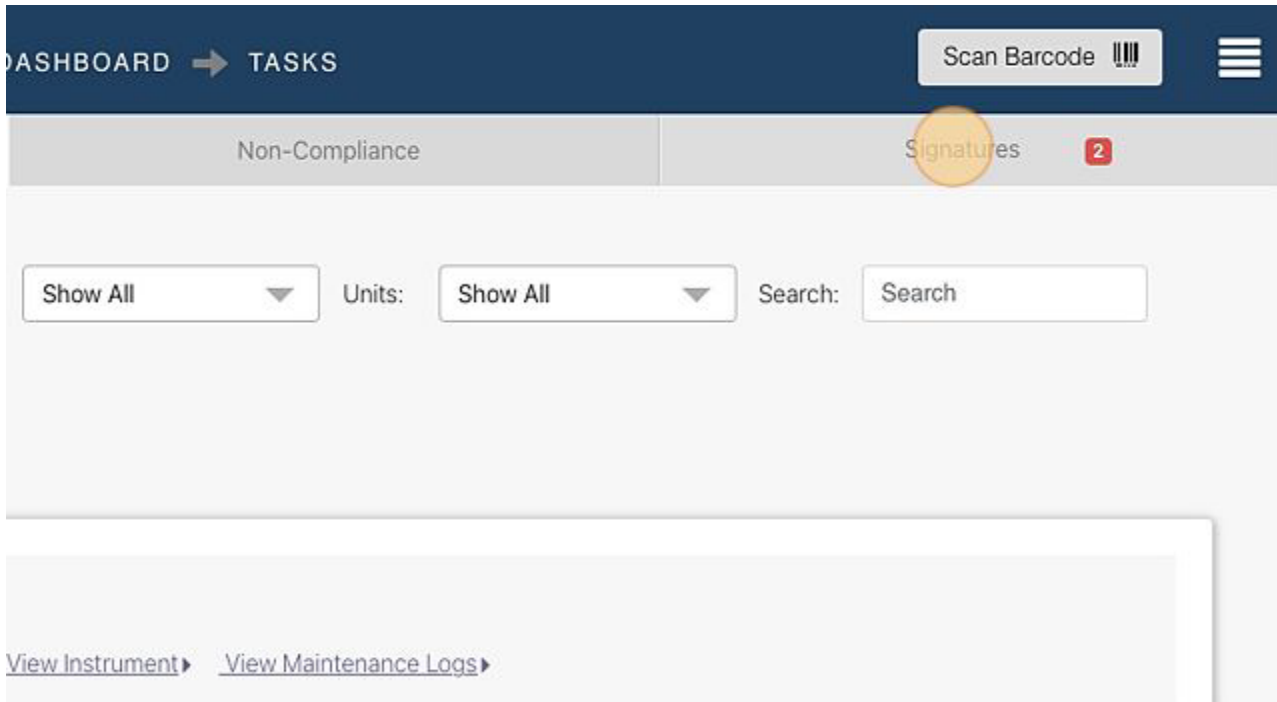
2. Any reports that require a signature will be listed
3. Select "View Now" to review the report

b

Pending

-Compliance that needs to be reviewed before the report can be generated

0/1 Signatures Collected

In your Queue

View Now ▸

EDT

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 ▸

Maintenance Logs

Sites

Departments

Benches / Units

Instruments

Users

Compliance Reviews

Deleted History

Filters

Sites: Main Lab   ⌄

Departments: Coagulation   ⌄

New ◯ Hide Empty Data   Apply

ⓘ ◯ Showing All Reports

March 2023

1. **Chemistry** Main Lab   Completed
   Final
   Last Modified: Jun 12, 2023 09:00 EDT   View Now ▸

6. Click Apply to save the toggle setting.

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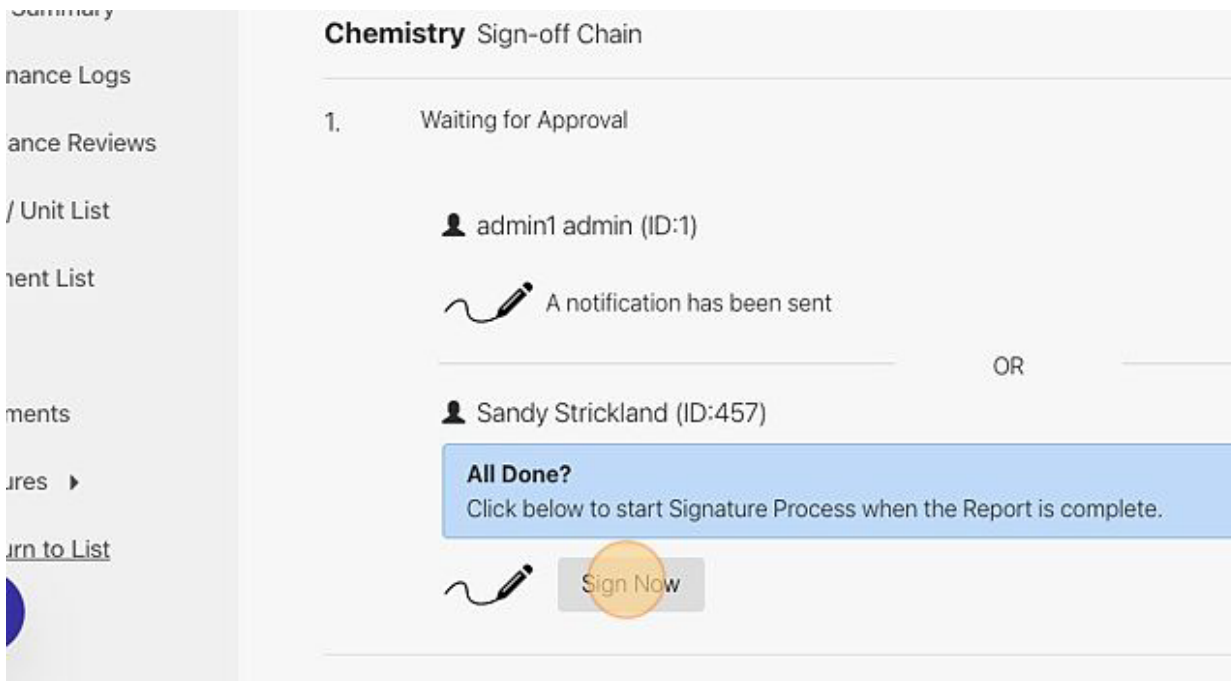
10. If you have already created a Pin, proceed to step 14. If not, continue with the next Step

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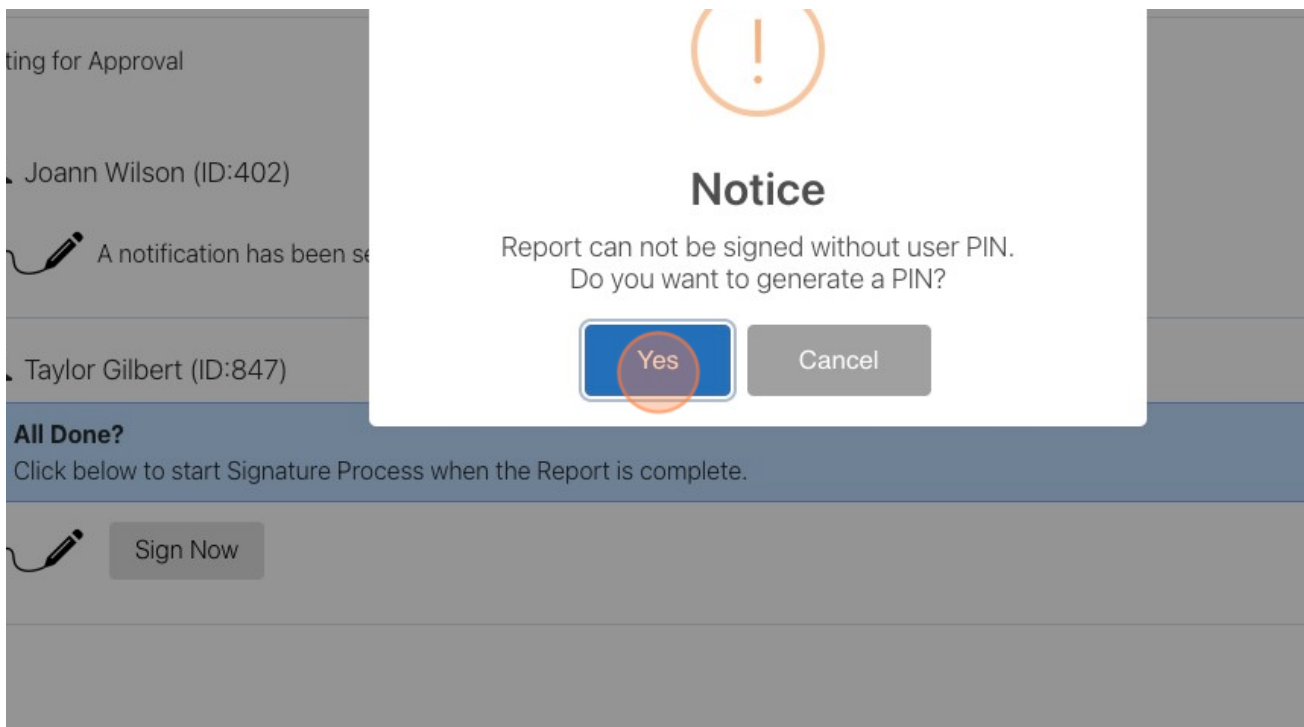
12. Click "Create Pin"

13. Enter a 4 digit Pin

14. Confirm Your Pin

15. Click "Create Pin"
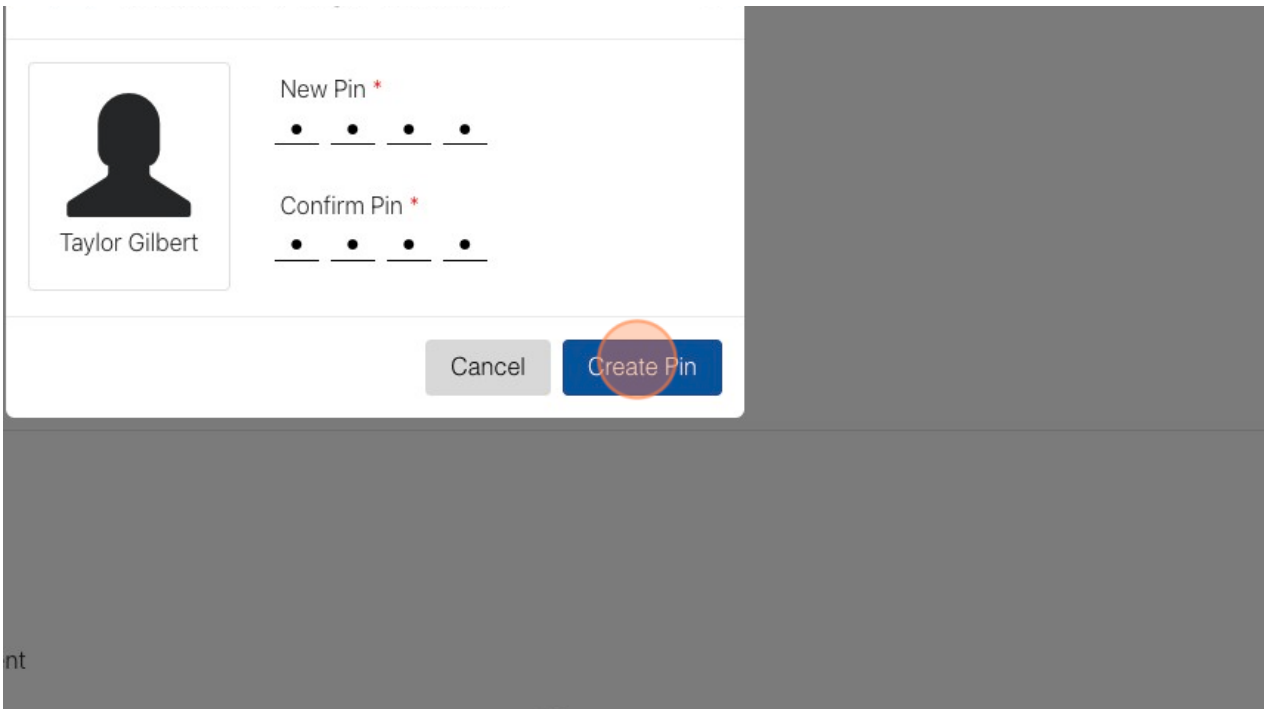
16. A window will pop up, you will enter any necessary comments
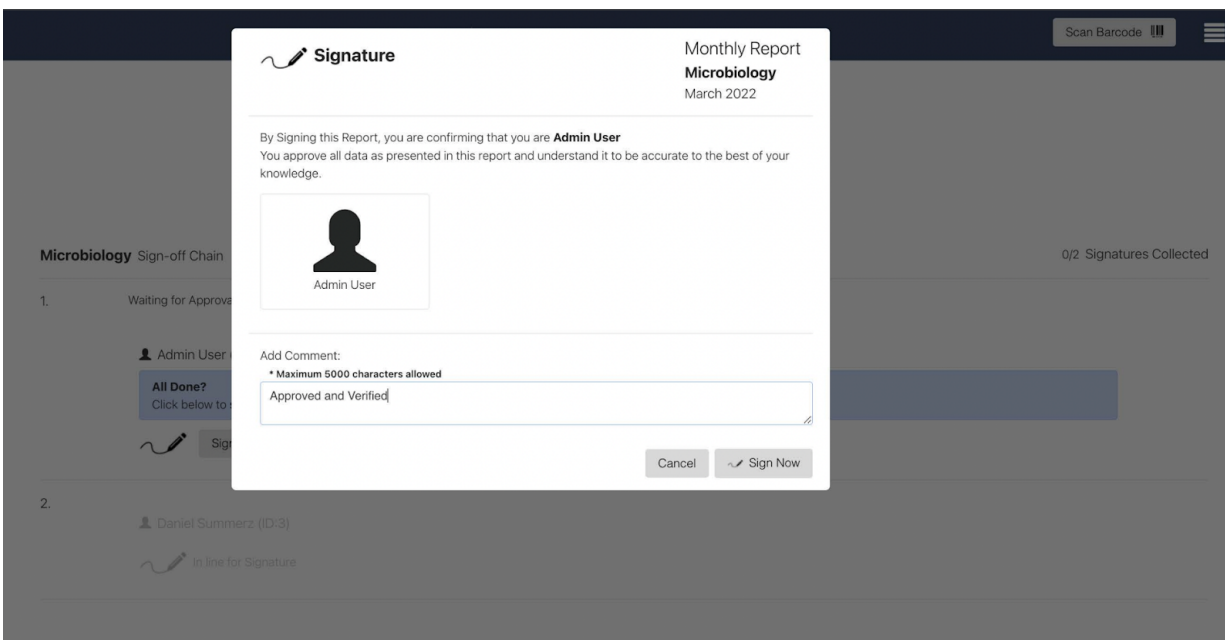
17. Select "Sign Now" when you are finished

allowed

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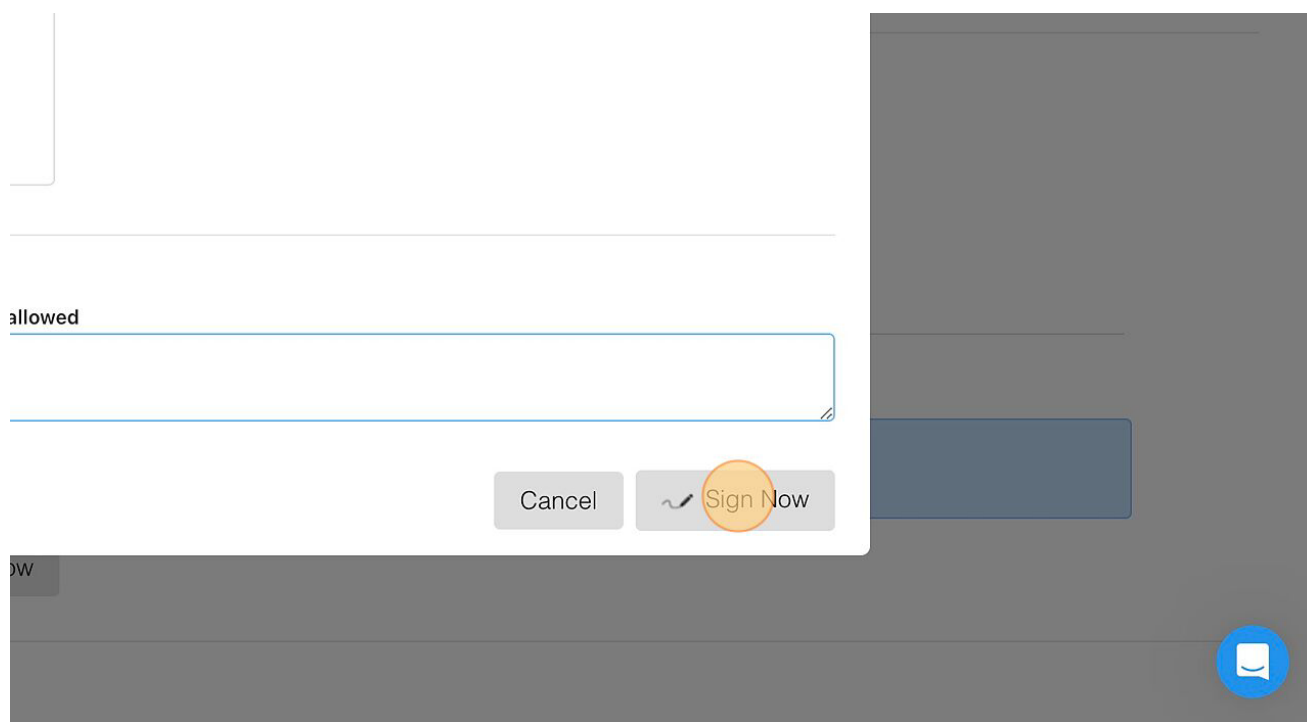
With the exception of the first user in the Sign-Off chain there is an option to sign the report or send the report back / return it to the previous user.
Use the following steps for this:

1. Select the "Signatures tab"
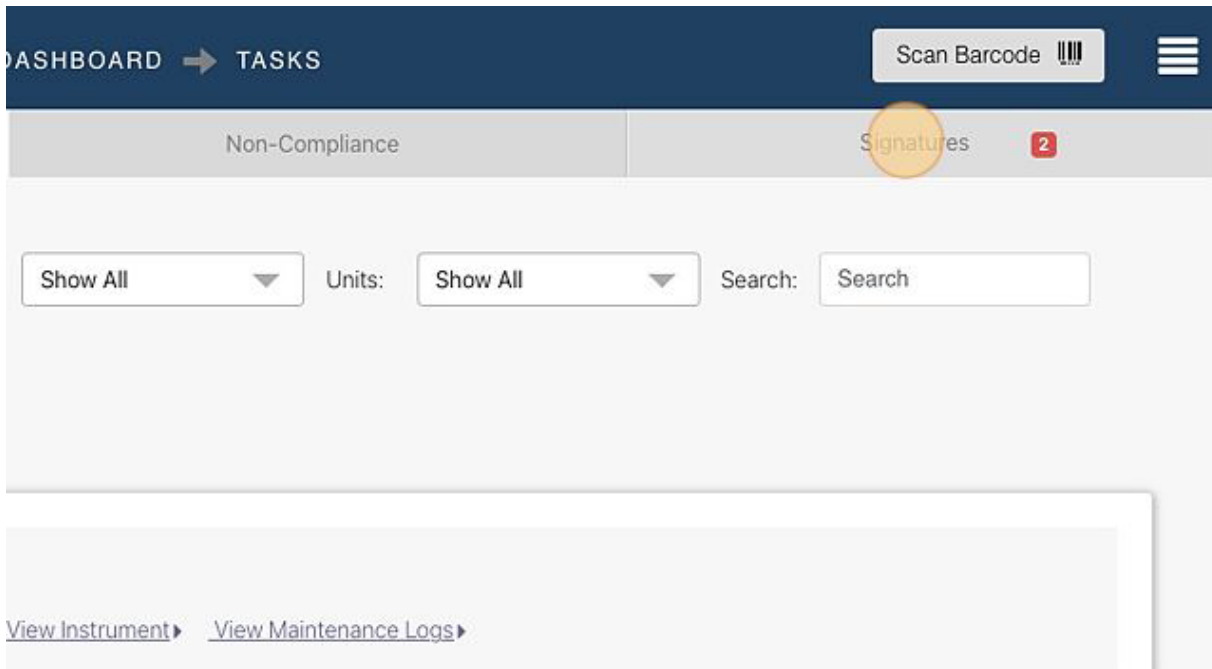
Scan Barcode |IIII|

Non-Compliance   Signatures   **2**

Show All   ▼   Units: Show All   ▼   Search: Search

View Instrument ▸   View Maintenance Logs ▸

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

0/1 Signatures Collected

In your Queue

EDT   View Now ▸

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".

n-off Chain   1/2 Signatures Collected

ndy Strickland (ID:457)

🖉 Signature Approval   ✓ Reviewed
    Apr 24, 2023 13:57 EDT
                                               ↺ Undo
ent:
ete

or Approval

ann Wilson (ID:425)

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

Report Summary

Maintenance Logs   Fe

Compliance Reviews   Rejecting this report will send it back to the Preparer (Sandy Strickland (ID:45
                                      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:
Users   * Maximum 5000 characters allowed

Attachments   Add a rejection message

Signatures ▶

← Return to List
                                                                          Cancel
●
                               👤 Joann Wilson (ID:425)

8. Select the "Reject Report" button

eport will send it back to the Preparer (Sandy Strickland (ID:457)) and will require every one in the Sign-off Chain to re-Sign.

The message below will be seen by everyone in the Sign-off Chain.

ge:

characters allowed

dd validation reports for new instrument.

Cancel   ⊘ Reject Report

1/2 Signatures Collected

✓ Reviewed

↻ Undo

ann Wilson (ID:425)

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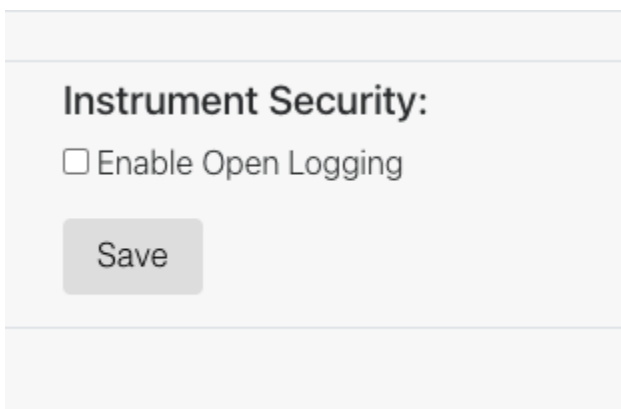
There are a few options when using open logging. Select which option works best for your facility.

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

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

Instrument Security:

✅ Enable Open Logging

Default:

Authenticated Users Only ⌄

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

Amniotest (Edit) (Clone)

1. Amniotest (Edit) (Clone)
   Site: SC Regional
   Department: Point of Care
   Bench / Unit: Point of Care
   -

Last 90 Days   No data

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

Instrument Security:

☑ Enable Open Logging

Default:

Open Logging (no password) ⌄

Save

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

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.
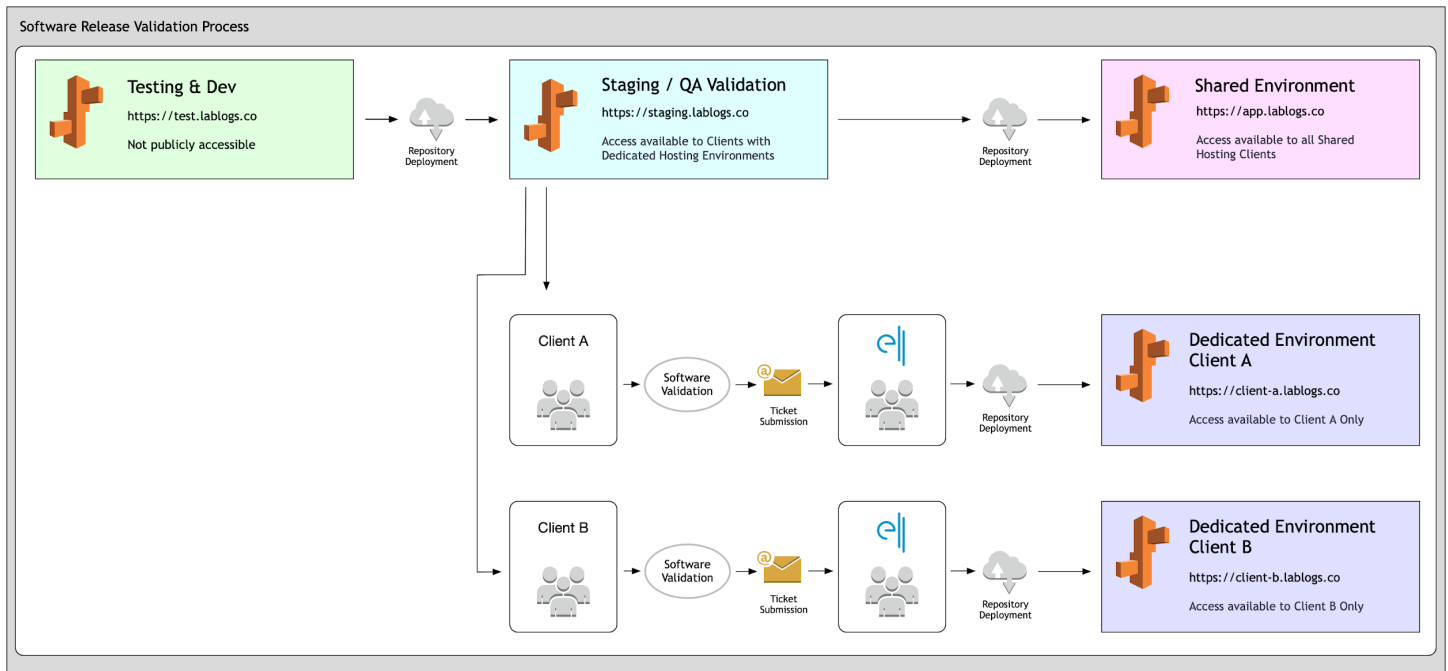
Step 1 - Testing / Development Environment Release

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:

http://help.lablogs.co/en/collections/3373635-release-notes

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

e‖ 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

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-setup-sso

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.

- 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

https://www.lablogs.co

info@lablogs.co

LabLogs.co Whitelist and Technical Requirements

Application Name	LabLogs.co
Application Type	Cloud-Based Web Application
Required Client Installation	None
PHI Data	None
Internet Connection	Required - High Speed (10Mbps+ Recommended)
Browser Recommendations	Chrome 60+, Edge 80+, FireFox 51+
Device Recommendations	Desktop Workstations, iOS or Android Tablets
Application URL	https://app.LabLogs.co
Authentication Methods	Default: In-App Authentication 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.com fonts.gstatic.com www.w3.org cognito-idp.us-east-1.amazonaws.com *.amazoncognito.com **Intercom Support App** widget.intercom.io api-iam.intercom.io js.intercomcdn.com intercom-sheets.com static.intercomassets.com wss://nexus-websocket-a.intercom.io help.lablogs.co **Google Analytics** www.googletagmanager.com www.google-analytics.com 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

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: https://aws.amazon.com/solutions/ .
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.
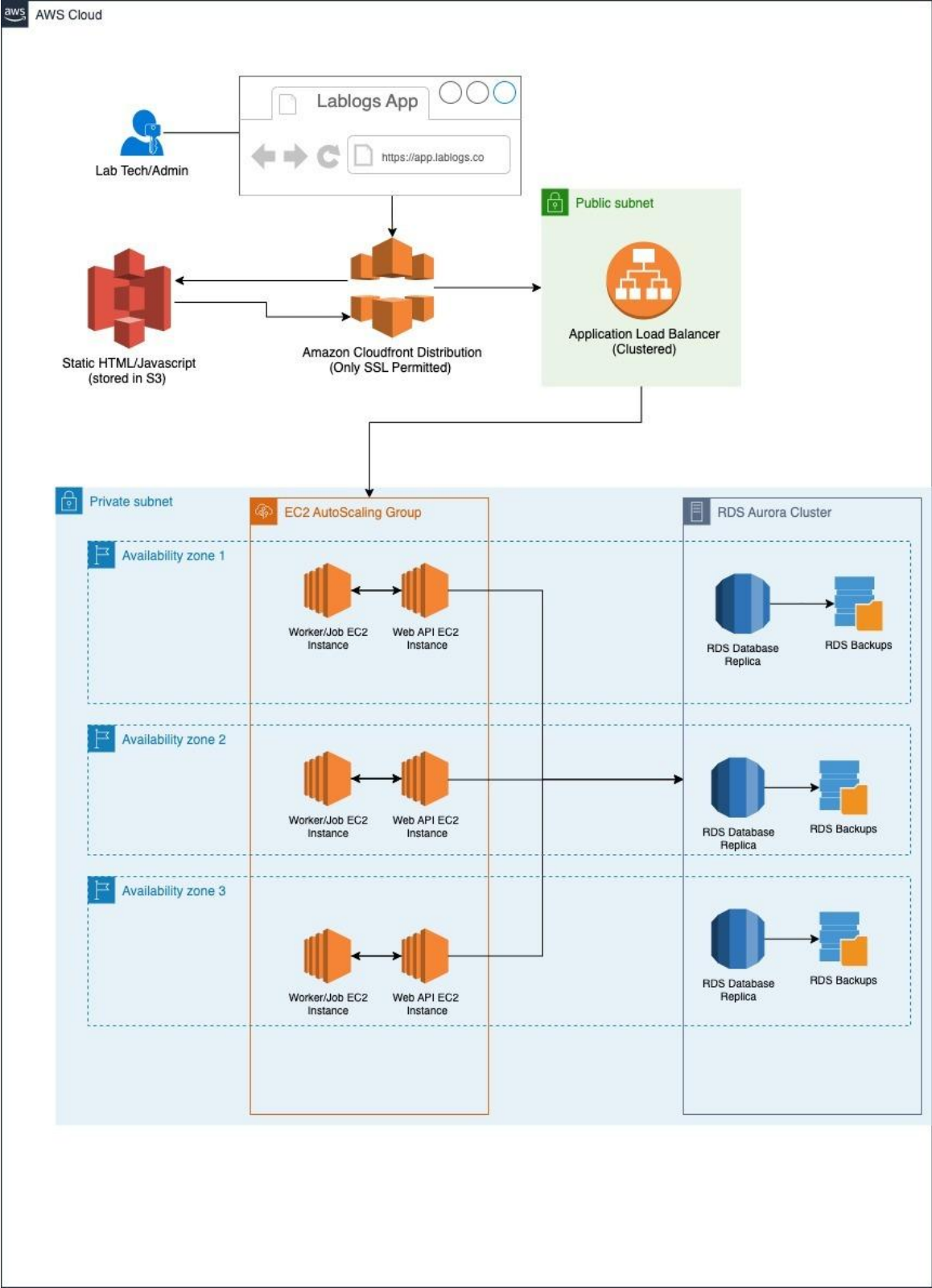
Redundancy

All EC2 and RDS instances are hosted in a minimum of 2 availability zones (usually more) to ensure minimum downtime in the event of an outage. EC2 Auto Scaling Groups are configured for multiple

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 https://docs.aws.amazon.com/AmazonS3. 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:
http://help.lablogs.co/en/articles/6408311-lablogs-co-sso-configuration-settings
Please contact our implementations team 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 to authorized individuals.	Access to all parts of the application is controlled by username and password. Each account has roles and permissions that limit the functions and data the account can access. LabLogs.co allows for additional security tailored for the Title 21 CFR Part 11 environment. These settings will allow Administrators to enforce that only authenticated users are able to log data (no anonymous Logger accounts), requirements for strong passwords and expiring passwords. This enhanced security also allows for: automatic account locking for multiple failed attempts, and; recording of IP addresses for all accesses.

| 11.10 (e) | 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) | 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 signature shall be unique to one individual and shall not be reused by, or reassigned to, anyone else.	Uniqueness of username and password is enforced by the system. This uniqueness survives even after the expiration of an account. Inactive accounts and their records are never removed from the system.
11.200 (a) (1)	Employ at least two distinct identification components such as an identification code and password.	LabLogs.co employs username and password protection, and enforces that the authenticated session maintains the continuity of IP address. Additional multi-factor authentication controls can be added to enforce further strengthening.
11.200 (a) (1) (i)	The system requires the use of all electronic signature components for the first signing during a single	All authenticated session are per confined to the browser window. Closing a window terminates the 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 that identification code and password issuances are periodically checked, recalled, or revised (e.g., to cover such events as password 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>

electronic lab logs

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