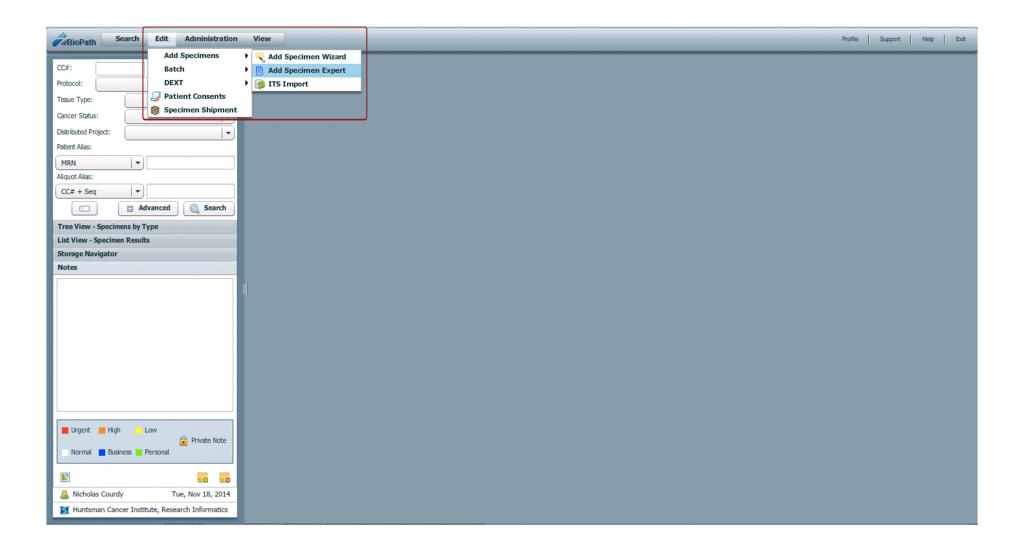
## itBioPath H()V(-T())**Creating Templates**



To create a new template or view existing shared templates navigate to Edit > Add Specimens > Add Specimen Expert A new window will open.

📱 Add Specimen Expert			×
File Template			
Saved Templates:			
▶ 🔄 Shared			
▶ 🔄 Work In Progress			
	Add Specimen(s)	Save as Work in Progress	Close

When the 'Add Specimen Expert' window first launches exisiting shared templates and works in progess will be visible. To create your own template click on the <sup>©</sup> icon.

📋 *Add Specimen Expert											×
File Template											
Saved Templates: 🖺 🔘 🤤											
Saved Templates:	Name: Training		Nicholas Courdy This ter	ion: mplate is for training.							
			I his tel	mplate is for training.							
Shared	Owner: Nicholas										
Work In Progress		uto-assign Dates									
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	Specimens:	· ·					active 📰 📗			Aliquots:	
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								Add Specimen	(s) 🔡 🔚 S	ave as Work in Progress	Close

The 'Owner' folder will appear with the new template in it. Title the new template according to your group's naming standards. Enter a description for the template. If the 'Share' option is checked, everyone will be able to view the template

d Templates: 🗅 💿 🤤	Tra	ining		🔒 Nicho		ription: template is f	for training.							
] Shared ] Work In Progress		ner: Nicholas (	Courdy uto-assign Dates											
Owner	Lab:		Label Format:											
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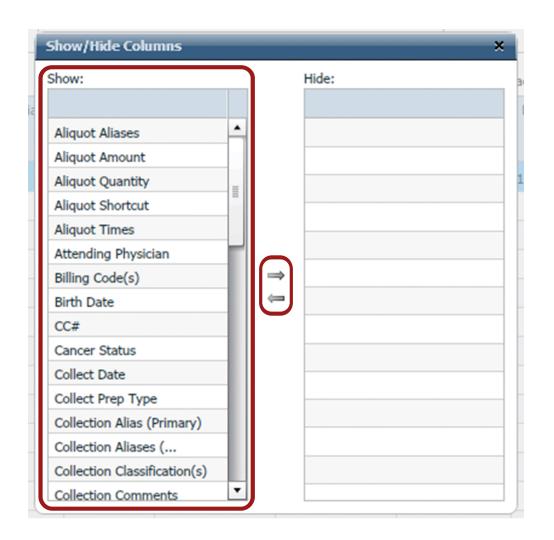
The lock icon and name at the top of the template indicates the current user. The template is only editable by the first user to open the template and can not be edited by other users during this time. To unlock the template, click 'Close' or the ■ icon. If the browser window is closed before unlocking, the template will stay locked to that user.

ed Templates: 🖺 🔇 🄇	Tra	ining		🔒 Nichola		cription: is template is fo	or training.			Selec	ted Specimen (be	low):	
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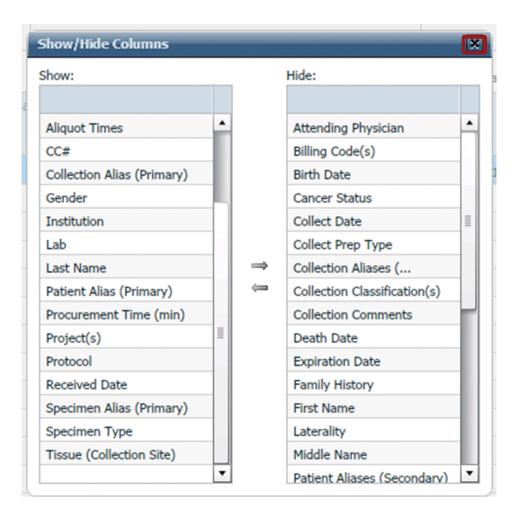
To add specimens to the template click on the  $\circ$  icon. In the appropriate fields, enter information about the specimens that will remain constant throughout the collection process.

File	Template													×
Saved T	Refresh Selected Templ Show/Hide Columns Copy to All Copy to Checked	ate Shift+F5 Ctrl+Shift+C	Jas Courdy Auto-assign Dates Label Format:	Richolas Courdy	Description: This template is	for training.			Selec	ted Specimen (below	v):			
	Add Specimen Duplicate Specimen Delete Specimen								Show Inactive 📰	si (* 18	8 0 0	Aliquots:		
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			1011								•			¥
										Add Specimen(s)		ave as Work in Pr	ogress	Close

The 'Add Specimen Expert' includes many different columns for data entry. All templates may not use every column. Choose which columns are visible by navigating to Template > Show/Hide Columns. A new window will appear.



To hide columns that are unnecassary for your template, highlight the column header on the left side and click the ⇒ icon to hide the column from view. Once hidden, a header can be unhidden by clicking the ⇔ icon.



Once all unnecessary columns are hidden click on the sicon in the top right. This will close the window and save the settings.

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	Owr	Auto-as     Lab:     Lat     Lat     Specimens:     Received Date/T	Training     Image: Nicholas       Owner: Nicholas Courdy     Image: Share       Image: Share     Image: Auto-assign Dates       Lab:     Label Format:	Training       Nicholas Courdy         Owner: Nicholas Courdy       This f         Owner: Nicholas Courdy       Auto-assign Dates         Lab:       Label Format:         V       Received Date/T.         Tissue (Collection Site)       Specimen Type	Training       Image: Nicholas Courdy         Owner: Nicholas Courdy       This template is for training.         Owner: Nicholas Courdy       Image: Nicholas Courdy         Share       Auto-assign Dates         Lab:       Label Format:         Image: Nicholas Courdy       Image: Nicholas Courdy         Specimens:       Image: Nicholas Courdy         Received Date/T.       Tissue (Collection Site)         Specimen Type       Specimen Sub-Ty.	Training       Image: Nicholas Courdy         Owner: Nicholas Courdy       This template is for training.         Owner: Nicholas Courdy       Image: Nicholas Courdy         Image: Share Image: Auto-assign Dates       Image: Nicholas Courdy         Image: Lab:       Label Format:         Image: Image: The Courd of the	Training       Image: Nicholas Courdy         Owner: Nicholas Courdy       Image: Nicholas Courdy         Share       Auto-assign Dates         Lab:       Label Format:         Image: Nicholas Courdy       Image: Nicholas Courdy         Specimens:       Image: Nicholas Courdy         Received Date/T.       Tissue (Collection Site)         Specimen Sub-Ty.       Specimen Sub-Ty.         Aliago(f)       Aliago(f)	Training       Image: Nicholas Courdy         Owner: Nicholas Courdy       This template is for training.         Owner: Nicholas Courdy       Image: Nicholas Courdy         Image: Share Image: Auto-assign Dates       Image: Nicholas Courdy         Image: Label Format:       Image: Nicholas Courdy         Image: Specimens:       Image: Nicholas Courdy         Image: Received Date/T.       Tissue (Collection Site)         Specimen Sub-Ty.       Specimen Aliagot(s)         Procurement       Instructionary	Training       Inite Nicholas Courdy         Owner: Nicholas Courdy       This template is for training.         Blood Product - Pla         Blood         Blood         Blood         Share         Auto-assign Dates         Lab:       Label Format:         Image: Specimens:         Image: Specimens:         Image: Received Date/T.         Tissue (Collection Site)       Specimen Sub-Ty.         Speciment       Institution         Patient Alias         Procurement       Institution	Training       Inite Nicholas Courdy         Owner: Nicholas Courdy       Inite template is for training.         Blood Product - Plasma         Blood         Blood         Blood         Share         Auto-assign Dates         Lab:       Label Format:         Image: Specimens:         Image: Specimens:         Image: Received Date/T.         Tissue (Collection Site)       Specimen Sub-Ty.         Speciment       Institution         Procurement       Institution         Patient Alias (       L	Training       Inite Nicholas Courdy         Owner: Nicholas Courdy       Blood Product - Plasma         Share       Auto-assign Dates         Lab:       Label Format:         Image: Collection Site)       Specimen Sub-Ty.         Speciment       Institution         Procurement       Institution         Procurement       Institution         Patient Alias (       L

The changes will now be reflected in the visible columns. Enter the correct information in each field about the collected specimens. To add 'Aliquot' information click on the z icon. A new window will open.

Storage						ĥ 🖸	×
Preparation Type	# of Aliquots	Aliases	Amount	Weight Unit	Volume Unit	Quantity Unit	Co
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The storage window will open. Click on the <sup>©</sup> icon to add Aliquot storage information for the template.

Add Storage		×
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Frozen V 3 Type Time		
Amount: Unit: Computation Type: Container Type: Storage Time ( 11/18/2014 (tir	ne unknov	а
		b
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Aliquot Comments:		
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Test Freezer   Test Box 1 🛛 🔍 🗆 🐨		ge All Locations
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	<ul> <li>Nex</li> <li>Sequence</li> </ul>	
	O Man	
		date Selections
	Clea	ar All Selections
Selected XY: F1, F2, F3 Selected XY:		5
		,
🖉 Update 🖉 Vpdate & Add	Another	Close
g opuate Volume & Aud	Allouler	Close

The 'Add Storage' window will open. Enter the correct information about the Aliquot collection. Also choose the Freezer Location of where the Aliquots will be stored. Once the information is complete, click 'Update'. The window will close.

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Preparation Type	# of Aliquots	Aliases	Amount	Weight Unit	Volume Unit	Quantity Unit	C
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The information will now be summarized in the 'Storage' window. If it is correct, click 'Close'.

*Add Specimen Expert File Template										
Saved Templates: Saved Templates: Saved Shared Sh	Own	ining er: Nicholas Courdy Share 🗹 Auto-ass			escription: This template is for training	ŀ		ted Specimen (b d Product - Plasi d		
	Spec	imens: Received Date/T.	Tissue (Collection Site)	Specimen T	Type Specimen Sub-Ty.	Specimen Alias (Primary)	Show Inactiv Procurement Time (min)	Patient Alias (Primary)	ž 🔾 🤇	L Storage Prep Type: Frozen
		11/18/2014 (tim	Blood	Blood Produ	vct Plasma					# Aliquots: 3  Amount: 1.0 mL per aliquot Aliquot Times: Type Time Storage Time ( 11/18/2014 (time unkt
										Aliquot Aliases:
	1					1001		Add Specimer		Save as Work in Progress Close

The entered Aliquot information will now quickly be available on the right side of the window.

ed Templates: L 🔯 🥥 🤤	Own	ning er: Nicholas C	Courdy		escription: his template is for	training.			Selected Specimer Blood Product - P Blood	. ,	
Work In Progress ) Owner =] <new></new>	Lab:		to-assign Dates Label Format:	-							
	Spec	imens:	•					Show Inactive 💷		<u> 1</u>	Aliquots:
		CC#	Collection Alias (Primary)	Protocol	Project(s)	Received Date/T.	Tissue (Collection Site)	Specimen Type	Specimen Sub-Ty.	Specimen Alias (Primary)	Storage Prep Type: Frozen # Aliquots:
				10924- Molecular		11/18/2014 (tim	. Blood	Blood Product	Plasma		3 •
				10924- Molecular		11/18/2014 (tim	. Blood	Blood Product	Serum		Amount: 1.0 mL per aliquot
				10924- Molecular		11/18/2014 (tim	. Blood	Blood Product	Red Blood Cells		Aliquot Times:
											Type         Time           Storage Time (         11/18/2014 (time
											Aliquot Aliases:
											b c

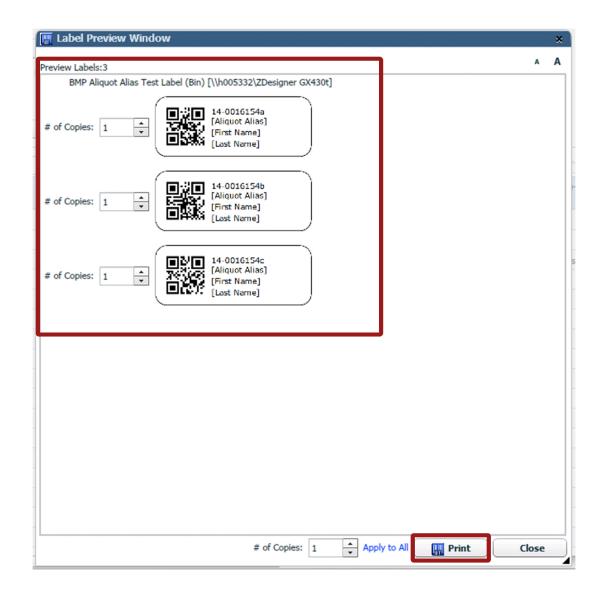
Continue to add specimens to the template by clicking the • icon. If collected specimens are similar, click the • icon to duplicate the information and expedite the process. Once all the specimen rows are complete, click 'Save as Work in Progress'.

🔋 Add Specimen Expert										×
File Template										
Saved Templates: 🖺 🔘 🤤	Name:		Description:							
		🔒 Nicholas Courdy	This template is for tra	aining.						
if beinge singer	Owner: Nicholas Courdy	Batch ID: N								
a farmar chose	Share 🗹 Auto-assign Dates									
a farmer chose	Lab: Label Format:									
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E Denninger Cardinant	Specimens:	0			6	Show Inactive		🖄 🖄 🕥 🤤	Aliquots: 🗹 Use Alias for Barcode	
E Daninger Cardinal	CC# Collection Alia	Protocol	Project(s)	Received Date/T.	Tissue (Collection Site)		Specimen Sub-Ty.			
E Daninger Cardinal										
E Destroyer Conditioned	14-0016154	10924- Molecul	ar	11/18/2014 (tim	Blood	Blood Product	Plasma			
of Conceptions	14-0016155	10924- Molecul	ar	11/18/2014 (tim	Blood	Blood Product	Serum			
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The template will now be copied to the 'Work in Progress' folder. The template will be locked to the current user, and not accessible for edits by other users until the current user has closed the window. The template will now have assigned the CC#s for the specimens. To print barcodes for the collected specimens click the in icon.

			Print Label For 14	-0016154		
Lab:	I					
-	6					•
Label	Format:		Note: selected labe	l format has identity in	formation included!	
-	Aliguet Alias Test La	for (Brc)				-
Label	Data For Selected F	ormat: 3 😔	Print to:  \h00533	32 ZDesigner GX430t		
	CC#+Seq	Aliquot - Amge	Birth Date	First Name	Last Name	Order
$\mathbf{V}$	14-0016154a	[Aliquot Alias]	[Birth Date]	[First Name]	[Last Name]	1
$\checkmark$	14-0016154b	[Aliquot Alias]	[Birth Date]	[First Name]	[Last Name]	2
✓	14-0016154c	[Aliquot Alias]	[Birth Date]	[First Name]	[Last Name]	3
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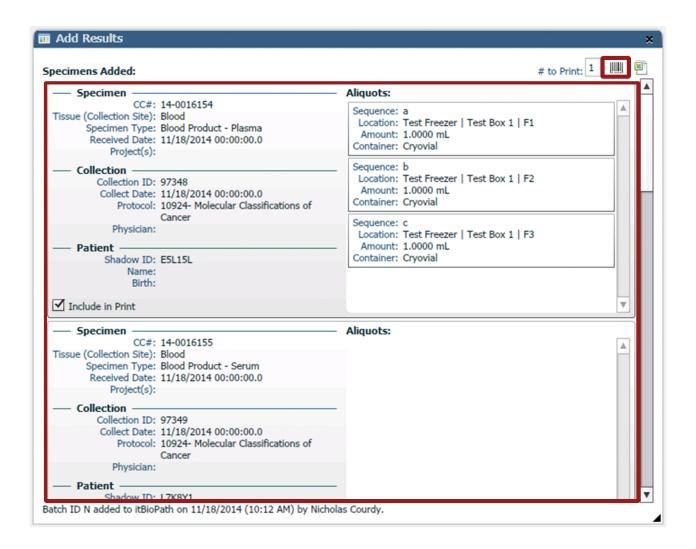
Specify which Lab and Label format will be used for printing information. Click 'Preview' to view how the labels will appear once printed.



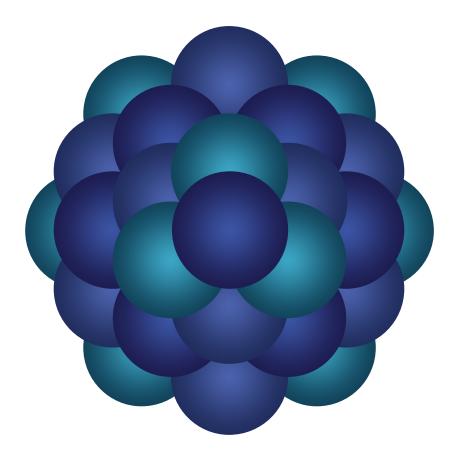
The labels will appear as they will be printed. If everything looks correct, click 'Print'.

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E Derriger Cardinal					924- Molecular		11/18/2014 (tim		Blood Product	Serum			
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If the specimen information is correct, click the check box next to the specimens and click 'Add Specimen(s)'. This will enter the specimens into itBioPath. Once the specimens have been added the work in progress will be deleted. The original template will remain and can be used to create another work in progress.



The 'Add Results' window will provide a summary of all the specimens that were added to itBioPath from the work in progress template. Barcodes can also be printed from this window by clicking the m icon.



## Questions?

Email 'Informatics - itBioPath Support' email group