



SciCord ELN/LIMS User Guide:

SciCord Client

A Guide to the

SciCord Laboratory Management Solution

Part 2

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The SciCord ELN/LIMS Solution

The SciCord solution is comprised of two parts, the SciCord Portal, and the SciCord Client.

- **SciCord Portal** is designed for specific users to configure the system, by conducting administrative duties (ex. role assignment, reporting, configurations, etc.)
- **SciCord Client** is designed for scientists, supervisors, and QA personnel to go through the workflow process of creating documents and/or samples, recording data, reviewing, and completing documents. There is a system of checks and balances between users that record information into documents, and users that review, approve, and complete documents.

Together the SciCord solution and the customer maintain the integrity demanded of a compliant environment.

U.S. F.D.A. CFR Part 11

The SciCord Solution represents a 'Closed System' providing compliancy to U.S. F.D.A. 21 CFR Part 11.



Part 11 applies in one of the following situations:

- When electronic records are used instead of paper.
- When persons make printouts but still rely on the electronic records in the computerized system to perform regulated activities.
- Records submitted to the FDA, under predicate rules (even if such records are not specifically identified in agency regulations) in electronic format.
- Electronic signatures intended to be the equivalent of handwritten signatures, initials and other general signings required by predicate rules.

SciCord Client

The SciCord Client is initially accessed through the SciCord Applications/Client Installer section of the SciCord Portal. The user must have the Auth_WebUILogin permission to access the SciCord Portal and the Auth_ClientLogin permission to access the SciCord Client. The Permissions granted in the SciCord Portal allow a user further access based on their roles assigned in the Client. The permissions grant access to certain Documents, Samples and Resource entity functions.

The SciCord Client is a rich internet application. It can create Documents, Samples, and Resources based on specific Templates where the user may record experimental data or sample management information. These entities can go through a workflow process from Created to Complete with various steps in between.

Versioning and Hosting

The SciCord Client provides visibility of the environment in the title bar. A user can access the full versioning information via the 'Help' tab, 'About SciCord' option in the drop-list of the 'Settings'.

- Product Name: SciCord Client
- Version: <Ver>
- WebApi version: <Api Ver>
- TemplateApi version: <TemplateApi Ver>
- Database version: <Database Ver>
- Environment: <Environment Name & Business version>
- Licensed to: <License>
- Memory used by process: mb
- Loaded Modules: lab equipment modules for equipment integration

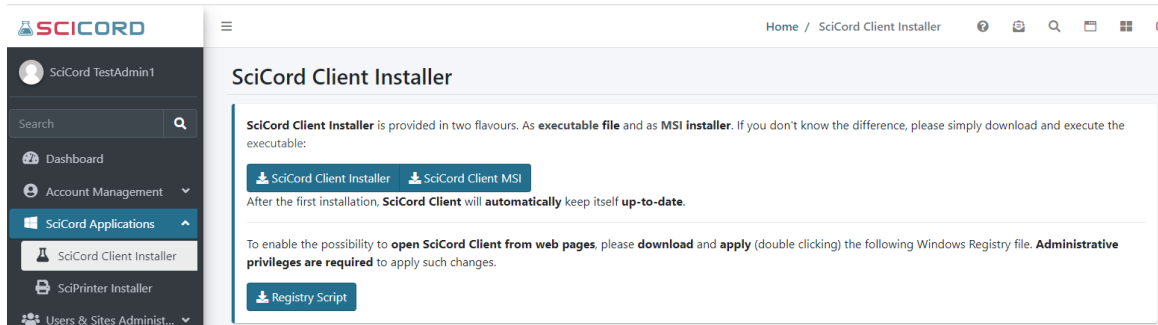
System Configuration and Customization

The SciCord Solution allows administrators to create and configure via the SciCord Portal 'system parameters', which the SciCord Client can use to implement specific Business Logic. Examples include:

- Provide a system configuration defining a default list of "Audit Reasons".
- Provide a system configuration to define whether "Audit Reasons" are mandatory.
- Provide a system configuration to define "default Review classification" automatically assigned to a new document.

Installation

Note: The User must have access to the SciCord Portal to begin the SciCord Client Installation Process.



The SciCord Applications, SciCord Client Installer can be easily installed. There are 2 options for installation:



SciCord
Client

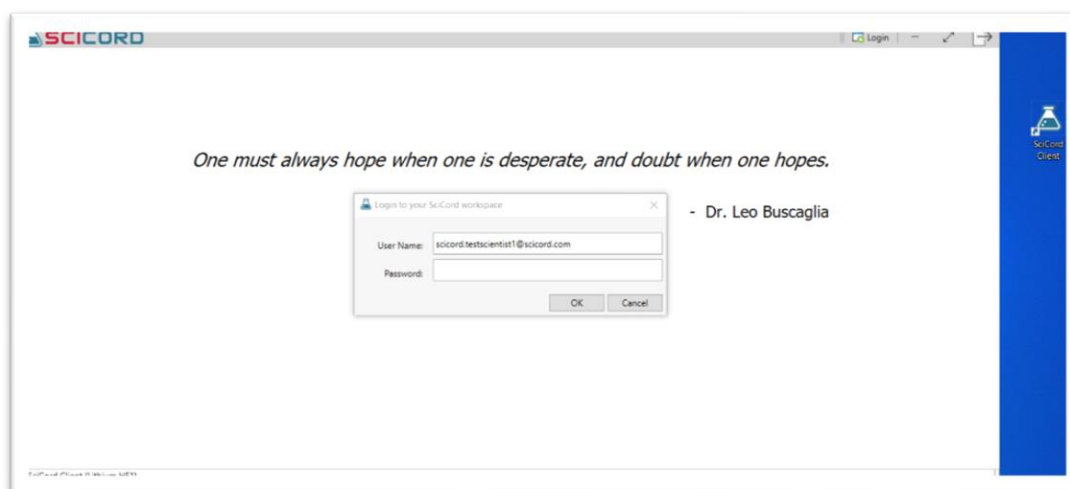
- **The SciCord Client Installer** will download an executable file on to your local machine. Once downloaded, the user may open the file where the installer file will automatically place an icon for the SciCord Client on your desktop, and open to the login screen. The name of the desktop shortcut will be 'SciCord Client'.

**This is the easiest and best option for most users.*

- **The SciCord Client MSI Installer** will download an MSI file on to your local machine. The MSI file will automatically configure your machine with all the data needed to install, update, modify the SciCord Client.

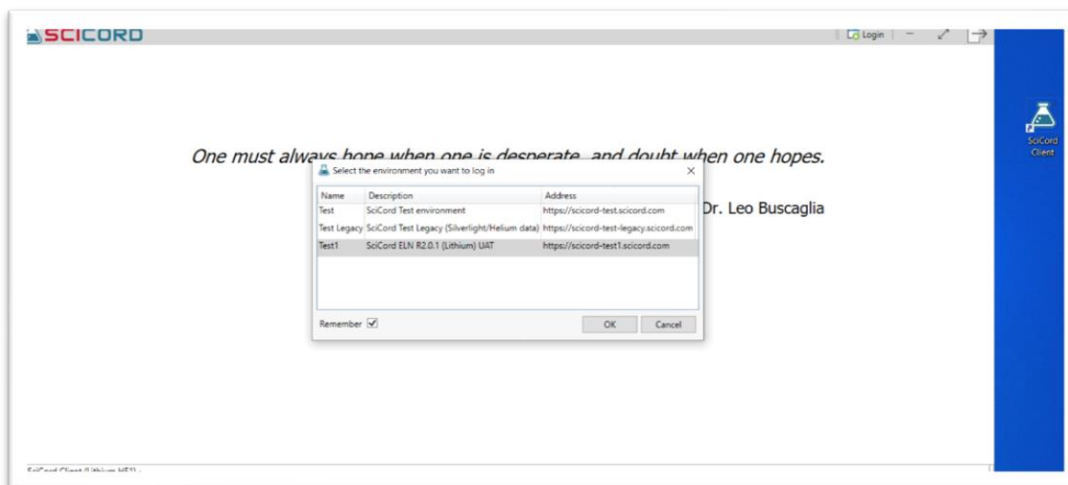
Registry Script will enable the ability to open SciCord Client from web pages.

Silo Environment Login



- ✓ Enter password
- ✓ Click OK

SciCord Multitenancy Login Screen



A Multitenancy user will have a selection dialog appear. The user will need to:

- ✓ Select target environment
- ✓ “Remember” checkbox (system will automatically remember your target environment)
- ✓ Click OK

Multi Factor Authentication

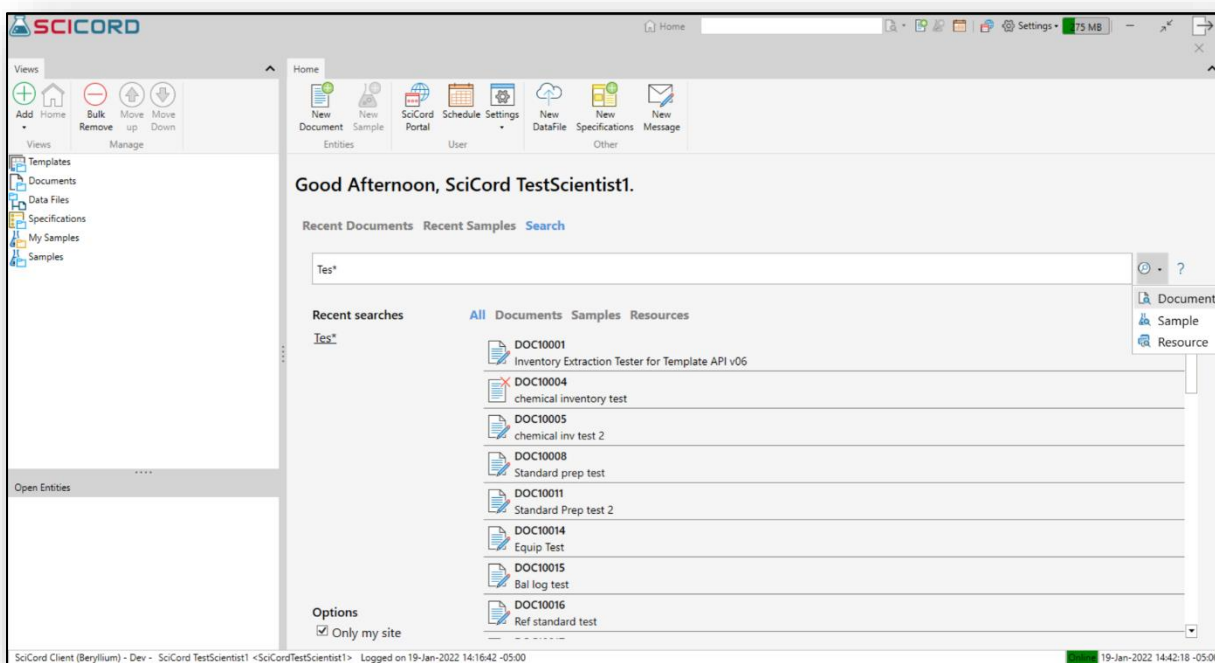
SciCord Client: Home Screen

Home Screen

Once the User has logged into the SciCord Client, it will open to the “Home” screen.

There are three visible panels in the SciCord Client Home screen:

- **Views** Pane in the upper left
- **Open Entities** Pane in the bottom left (directly under the Views Pane)
- **Home** Pane selected is the large section on the right. Greeting appears along with recent entities (if any) that have been recently opened by the user.
 - **Recent Documents, Recent Samples, and Search** tabs are present with a full text search bar, a drop list for Document, Sample, Resource, and a Help button.



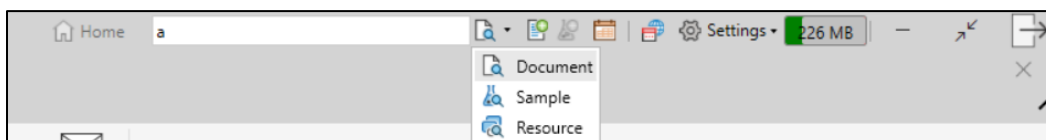
A unique feature is that the User may re-size each of the panes by selecting the border and dragging it to the desired location.

*See the SciCord Icons and Meanings section for a description of each of the icons.

SciCord Client: Home Functions

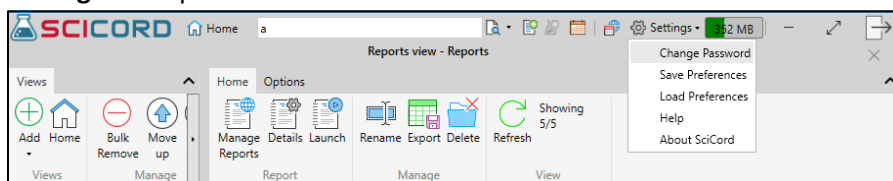
Standard Functions

There are shortcut functions that appear at the top of the Client's Home screen regardless of which View the user has selected. By hovering over each of the functions the user will observe a dialogue (tooltip) that states what each shortcut function does.



From left to right the Functions are:

- **Home:** one click navigation to the Home dashboard
- **Quick Search Bar:** once typing begins a drop list allows the user to select an entity to search for and enter in any numeric or text search for:
 - Document
 - Sample
 - Resource
- **Create a new Document:** one click option to open New Document dialog
- **Create New Sample:** one click option to open New Sample dialog
- **My Calendar:** one click to open users Work Request schedule
- **SciCord Portal:** one click navigation to open the SciCord Portal
- **Settings:** a drop-list that allows a user to select

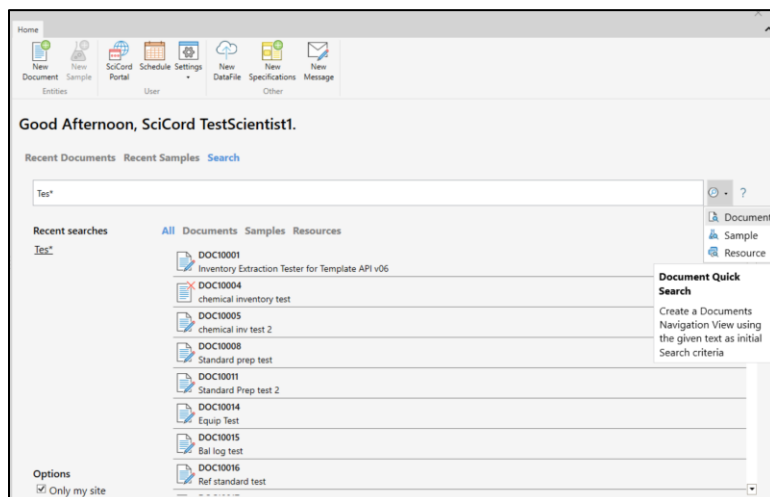


- Change Password
- Save Preferences
- Load Preferences
- Active Content Link (available in Beryllium or newer release)
- Help – will open the SciCord User Guide
- About SciCord
- **Memory Usage Gauge:** color coded system usage shown in mb
- **Minimize, Maximize** screen


- **Logout Icon:** An error message will appear if any open entities need to be closed prior to logging out.
- **X:** used to close the **Home** view panels current page (*directly below the logout icon*)
- **^:** used to collapse the **Home** ribbon

Home Dashboard

Upon login the user is greeted and can quickly look up any recently opened documents, samples, or search from a full text search bar (available in Beryllium or newer release).



Search (available in Beryllium or newer release)

Full text search bar allowing for a quick search of All, Documents, Samples, and Resources using the tabs on the search page. A Help button  is present to assist the user using strings with the following examples:

Syntax	Example	Explanation
AND	Test AND API	include if any term is found (default behavior for multiple terms)
OR	Test OR Analysis	include if either term is identified
Prefix Search (Asterix)	DOC*	wildcard can be used as prefix
Quotes	"Exact match"	force match on entire phrase
Attribute	"Project:PRJ001"	Samples or Documents with specific attribute values (attribute name=Project)

A check box for "Only my site" is checked by default

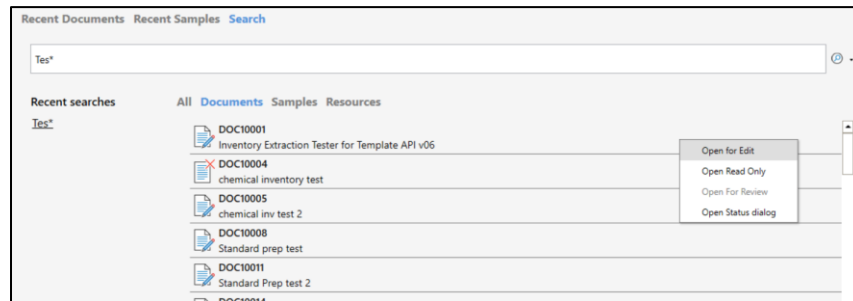
A filtered search can also be performed using the drop list at the end of the search bar.



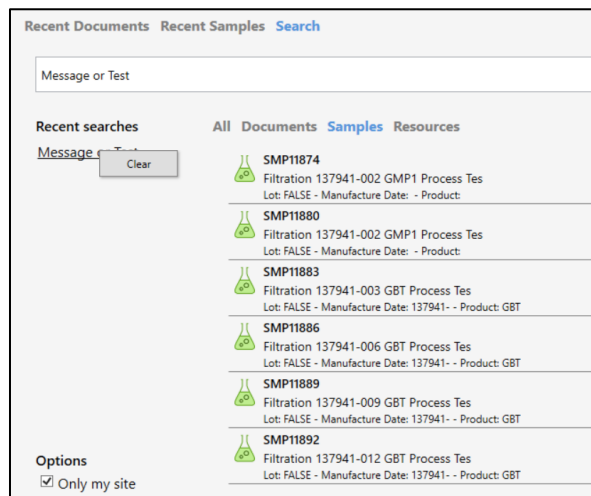
A right or left click at the "..." reveals a dialog box to select an action:

- Open for Edit
- Open for Read Only
- Open for Review
- Open Status Dialog

Once the action is selected the system will navigate the user to the selection.

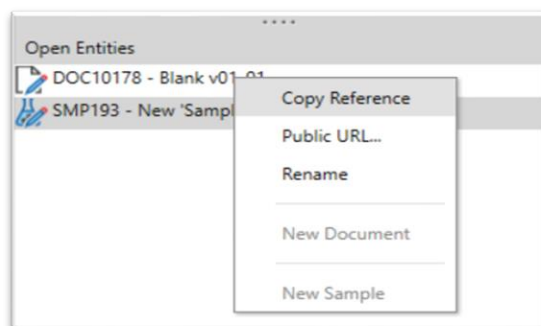


User may clear searches by right click of Recent Searches



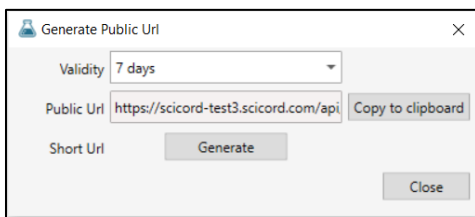
Open Entities Pane

There are five functions that are available in the Open Entities pane. Within the Open Entities pane, right click reveals each of the functions the user has access to use. Below is an image of the Views Pane functions.



The right click within the Open Entities pane functions are dependent on the user permissions and actions performed:

- **Copy Resource:** copy a resource reference (ex. *REFDOC[10178] Blank v01_01*)
 - **Public URL...:** creates a URL link to share.

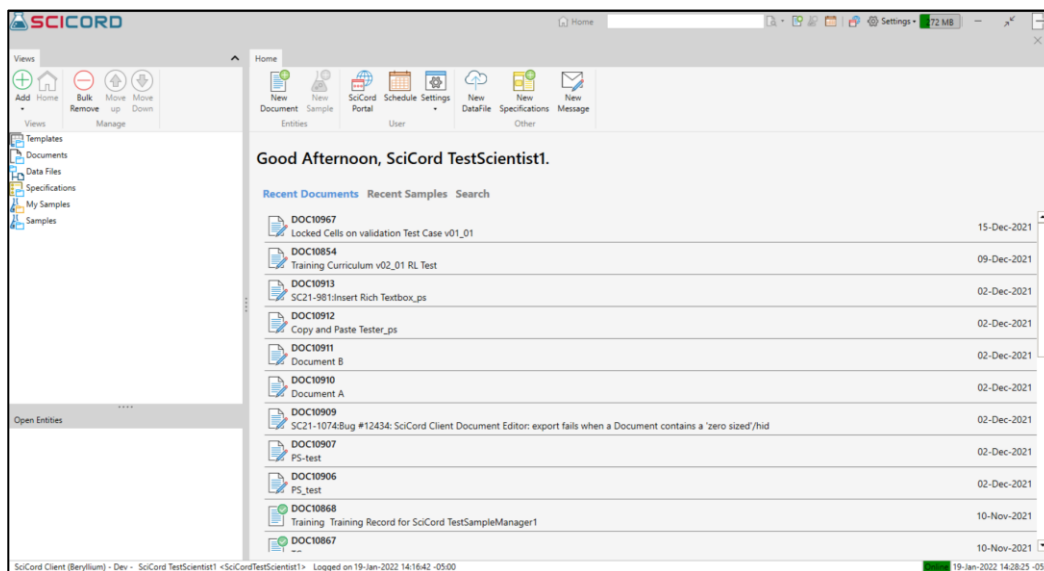


Drop list selection for length of Validity. Options to Copy to Clipboard, Generate a Short URL, and Close dialog.

- **Rename:** to rename an entity
- **New Document:** takes user to a dialogue to select the template for a new document
- **New Sample:** takes user to a dialogue to create a new sample

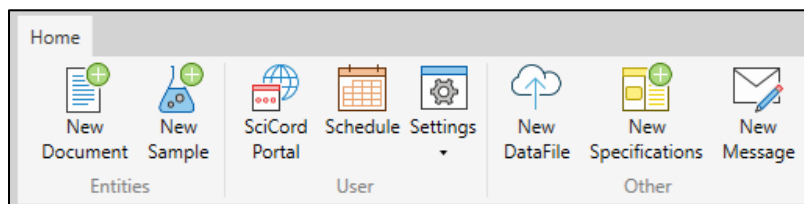
Main 'Views' Pane

Upon login, the user is greeted and shown a list of **Recent Documents**, **Recent Samples**, and **Search** accessed.



Welcome Screen Home View

Shown here is a close up of the **Home** tab functions on the **Welcome** screen. The **Home** tab is divided into 3 sections: **Entities**, **User**, and **Other**



- **Entities:** allows for creation of **New Document** and **New Sample**.
- **User:**
 - **SciCord Portal** one click access to the SciCord Portal login
 - **Schedule:** opens the users work request schedule
 - **Settings:** functions include:
 - **Change Password** - dialogue to change password
 - **Save Preferences** - save user desired selections for Welcome Screen
 - **Load Preferences** – load user desired selections for Welcome Screen

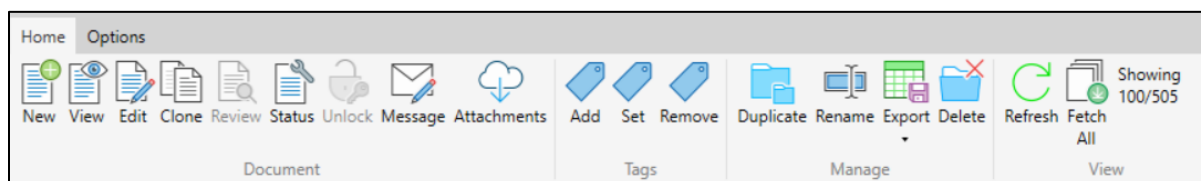
- **Active Content Link**- connects users' phone to the Client. Use it as a Barcode scanner or send images (Available in 2.1 or newer version)
- **Help** – downloads the SciCord User Guide
- **About SciCord** – version information for SciCord Client
- **Other:** will open a dialog that allows for creation of **New Data File, New Specification, New Message**

SciCord Client: Views

Home Tab

Home tab will vary depending on the type of view that the user has accessed. The **Home** tabs are grouped and divided into sections with icons and tool tips to guide the user to complete tasks.

See **Documents** view example below:



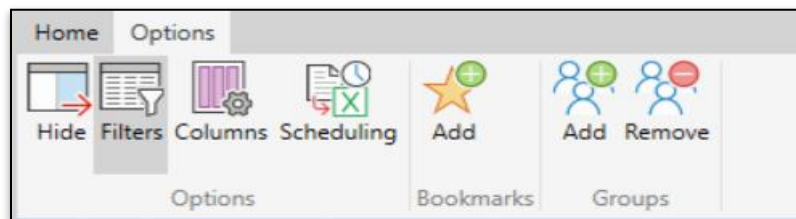
* The **Manage** and **View** sections of the **Home** tab are consistent for all views.

Options Tab

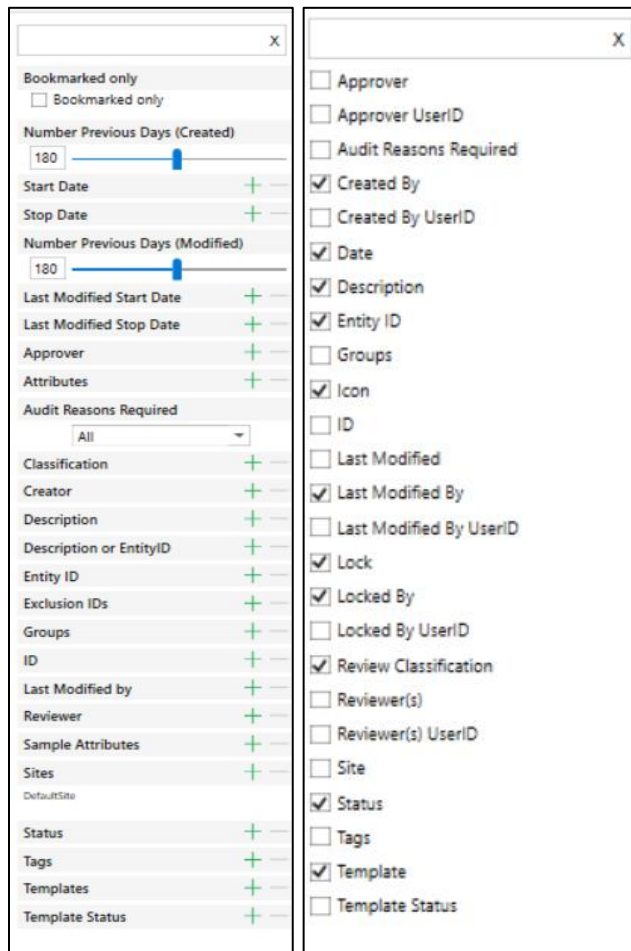
The Views Pane allows the user to quickly access from a list of views that the user may choose to include in their views list. Each of the pre-defined views are unique with their own filtering capabilities.

Tip: The User may add multiple versions of the same View and rename them if they choose; this may be beneficial to the user if they would like to filter each of the views differently.

Filters: In the **Options** tab the user can reveal a hidden pane that is on the right of the SciCord Client screen. To access the **Filters** and **Columns** function navigate to:



- **Options** tab in upper toolbar
- **Hide** is used to close the **Filters, Columns, and Scheduling** pane.
- **Filters** and **Columns** icons are present may be used to sort and present data that is relevant to the User. The Default columns included on each specific 'View' pane vary depending on which View is selected. Below is an example image (from the Documents View) of the Filters and Columns that a User may choose to include in their various Views.



Filters View

Columns View

- Dialogs and/or drop lists will prompt the user for criteria to set for Filters. A slider can be used for date criteria as well as a text box for numerical entry
- Checkboxes are used to set criteria for Column filtering
- Green '+' symbol the user may add one or multiple filters
- Red '-' symbol the user may remove one or more filters

Once the filters are set, the user may sort by selecting the Column header in the specific 'View' pane, which will order the data either ascending or descending. Example below:

**Denoted by the downward arrow in the Date column, to display it is sorted in descending order. An upward facing arrow denotes ascending order.*

Current Amount	Amount	Current Location	Date	Created By	Review Classification
100	Units	Main Lab	27-Aug-2021 11:26:15	SciCord TestSamp	PeerReview

- **Scheduling** used to create recurring reports that will be sent to logged in user email. Click the dots “...” next to “Schedule”; a dialog with drop list for the Cron Expression will appear to make schedule selection.

Set schedule and click the Create button to schedule recurring data extraction. Results will be sent to your email inbox.

Schedule

0 0 * * * ...

At 00:00

Description

Do not notify if View is empty

Create

Cron Expressions ×

Every day at Midnight ▾

Every top of the hour

Every mid of the hour

Every day at Midnight

Every day at Noon

Every week on Monday at Midnight

Every week on Monday at Noon

Every month at Midnight of the first

Every month at Midnight of the 15th

Every year on January the first at Midnight

Views Pane

There are five options available within the Views pane. Every user is allowed access to these five functions. Hovering the mouse over Add, Home, and Bulk Remove icons will reveal a tool tip description of each item.

- **Add:** Drop list options used to create and add navigation views. Available views:

- | | |
|--------------------------------------|-------------------------------------|
| <input type="radio"/> Documents | <input type="radio"/> Work Requests |
| <input type="radio"/> Data Files | <input type="radio"/> Templates |
| <input type="radio"/> Groups | <input type="radio"/> Users |
| <input type="radio"/> Inventory | <input type="radio"/> My Approve |
| <input type="radio"/> Requests | <input type="radio"/> My Documents |
| <input type="radio"/> Messages | <input type="radio"/> My Data Files |
| <input type="radio"/> Resources | <input type="radio"/> My Reports |
| <input type="radio"/> Reports | <input type="radio"/> My Resources |
| <input type="radio"/> Results | <input type="radio"/> My Review |
| <input type="radio"/> Samples | <input type="radio"/> My Samples |
| <input type="radio"/> Sent Messages | <input type="radio"/> My Templates |
| <input type="radio"/> Specifications | <input type="radio"/> My Users |

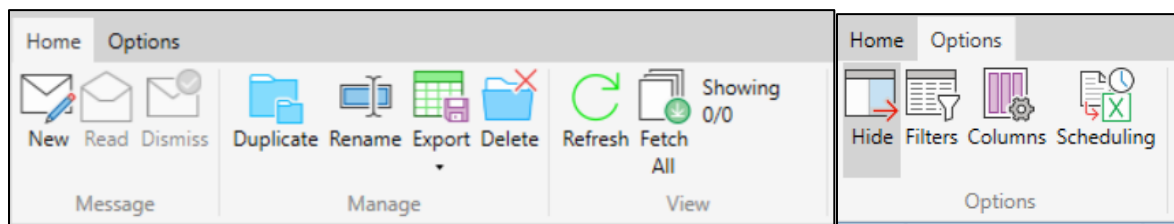
- **Home:** one click navigation
- **Bulk Remove:** opens a dialog to remove multiple views
- **Move Up:** select a view to move up in the list of views
- **Move Down:** select a view to move down in the list of views
- **^:** used to collapse the



to the Home dashboard dialog to remove multiple
move up in the list of views
to move down in the list of
Views ribbon

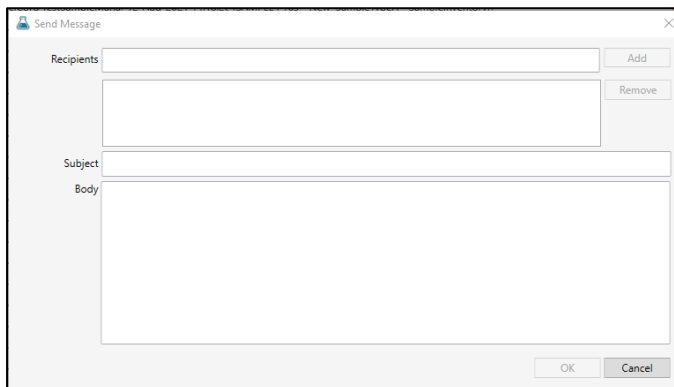
Messages View

Below is an image of the functions associated with the Messages View. There are three sections: **Message, Manage, View.**

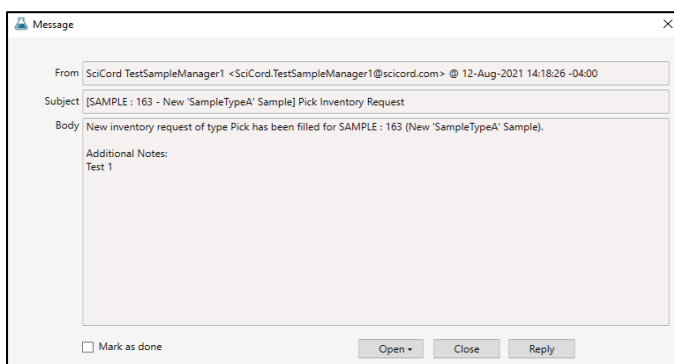


In the **Message** section, from left to right the functions are:

- **New Message** – a dialogue that allows a user to send a Message (Subject and Body) to users with access to the SciCord Client. Once typing begins, a selection of system users appears in the Recipients field to Add to the message.

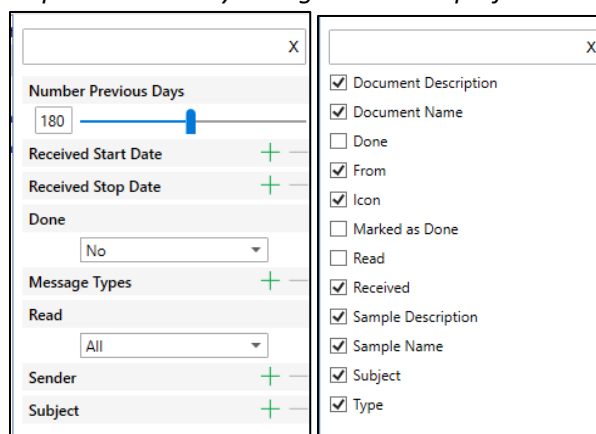


- **Read Message** – The user is allowed to Read the Message that has been selected.



- **Dismiss** - The user can 'Dismiss' or mark as done on the Read Message dialogue or they can select the Dismiss icon as seen above in the Messages Functions ribbon.

**Tip: The User may change their mail preferences by using the Options tab Filters.*



Messages default Filters and Columns

The **Manage and **View** sections of the **Home** tab are consistent for all views.*








- **Duplicate** – Create a copy of the current view
- **Rename** – user can rename the message view
- **Export View** – allows the User to Save as an Excel file the Messages View


- **Delete** – removes the messages view
- **Refresh** – allows the View page to be refreshed
- **Fetch All** – shows the number of Messages included in the Messages View. When Fetch All is used, all messages will be displayed. If there are no Messages, then this will appear as '0/0'.

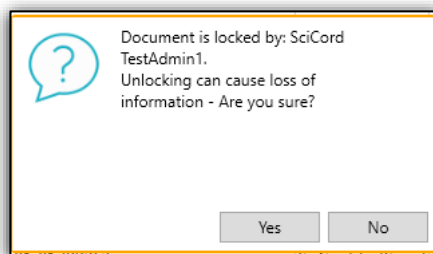
Documents View

The Documents View lists all the Documents in the SciCord Client.

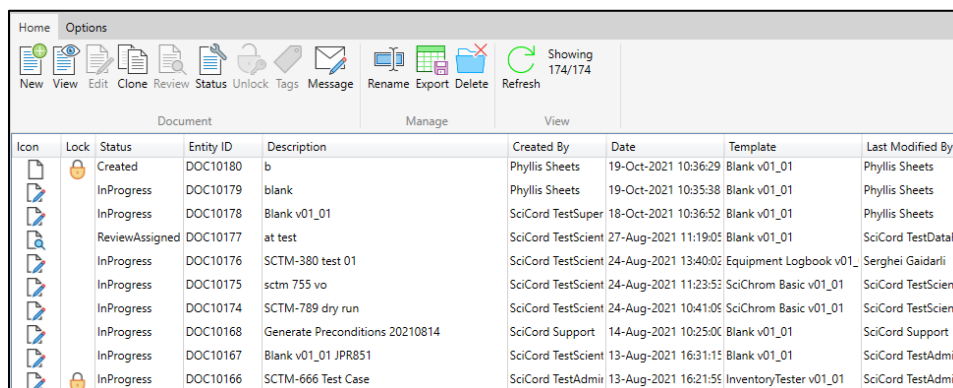
Icon and **Lock** column appear in the Documents View. The icon meanings are described:

Icon	Meaning
	Created Status
	Cancelled Status
	Rework Requested Status
	In Progress Status
	Review Assigned Status
	Approve Assigned Status
	Complete Status

In the **Lock** column, the  will appear if the Document is currently in use by another user. If a user chooses to unlock the document, then a dialogue will appear:



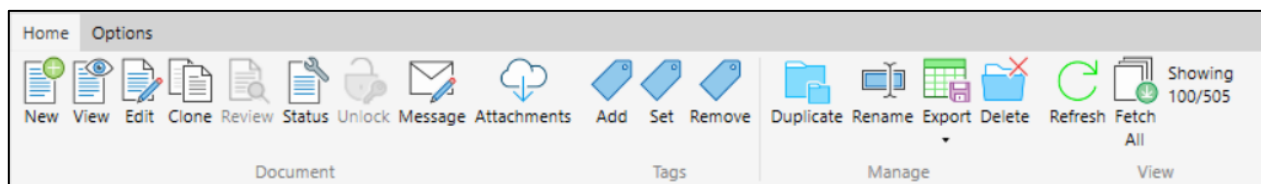
**Only users with Document_Unlock permission can perform this action.*



Icon	Lock	Status	Entity ID	Description	Created By	Date	Template	Last Modified By
		Created	DOC10180	b	Phyllis Sheets	19-Oct-2021 10:36:29	Blank v01_01	Phyllis Sheets
		InProgress	DOC10179	blank	Phyllis Sheets	19-Oct-2021 10:35:38	Blank v01_01	Phyllis Sheets
		InProgress	DOC10178	Blank v01_01	SciCord TestSuper	18-Oct-2021 10:36:52	Blank v01_01	Phyllis Sheets
		ReviewAssigned	DOC10177	at test	SciCord TestScient	27-Aug-2021 11:19:05	Blank v01_01	SciCord TestDataR
		InProgress	DOC10176	SCTM-380 test 01	SciCord TestScient	24-Aug-2021 13:40:02	Equipment Logbook v01_	Sergei Gaidarli
		InProgress	DOC10175	sctm 755 vo	SciCord TestScient	24-Aug-2021 11:23:53	SciChrom Basic v01_01	SciCord TestScient
		InProgress	DOC10174	SCTM-789 dry run	SciCord TestScient	24-Aug-2021 10:41:05	SciChrom Basic v01_01	SciCord TestScient
		InProgress	DOC10168	Generate Preconditions 20210814	SciCord Support	14-Aug-2021 10:25:00	Blank v01_01	SciCord Support
		InProgress	DOC10167	Blank v01_01 JPR851	SciCord TestScient	13-Aug-2021 16:31:15	Blank v01_01	SciCord TestAdmin
		InProgress	DOC10166	SCTM-666 Test Case	SciCord TestAdmin	13-Aug-2021 16:21:55	InventoryTester v01_01	SciCord TestAdmin

Document view illustrating Documents view Lock icon

The Home tab Documents view functions (from left to right) are:



**Hover the mouse over each icon to view the tool tip for each.*

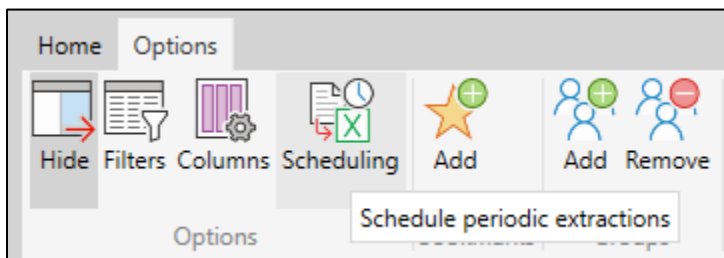
- **New:** Document_Edit permission required
- **View:** Document_View permission; opens document with a ribbon stating:
 - "READ ONLY VIEW Changes to the document will not be persisted."
- **Edit:** Document_Edit permission required
- **Clone:** Document_Clone permission; clones selected document
- **Review:** Document_Review permission required; user is assigned to Review the Document
- **Status:** Document Status Update permissions required.
- **Unlock:** Document_Unlock permission required
- **Message:** Create a Message for the Selected Document
- **Attachments:** download selected document attachment or attachments
- **Tags:** opens dialog to create a tag for entity. Add, Set, or Remove tags.

The **Manage and **View** sections of the **Home** tab are consistent for all views.*

- **Duplicate:** Create a copy of the current view
- **Rename:** Renames the Document view

- **Export:** Allows the User to Save as an Excel File the Documents View
- **Delete:** Deletes the Document view currently displayed
- **Refresh:** Refresh Documents List
- **Fetch All** shows the number of Messages included in the Messages View. When Fetch All is used, all messages will be displayed. If there are no Messages, then this will appear as '0/0'.

The Options tab Documents view functions (from left to right) are:



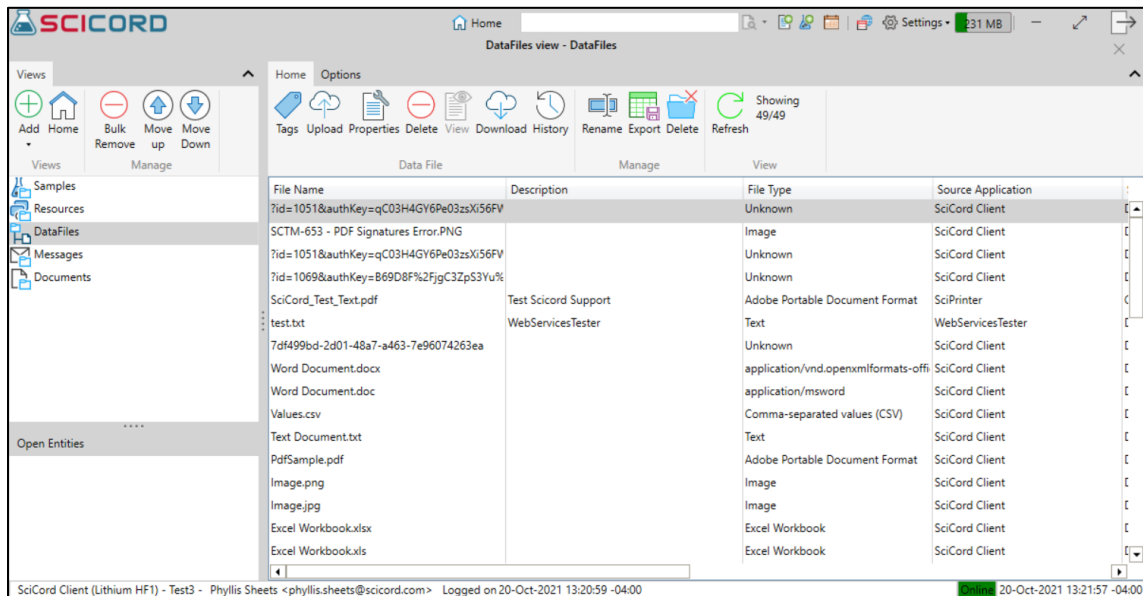
**Hover the mouse over each icon to view the tool tip for each.*

- **Hide:** using this icon will close the filters/columns display
- **Filters:** filter data to locate or narrow to locate an entity
- **Columns:** checkboxes used to reveal columns to be shown in entity view
- **Scheduling:** See page 14 for explanation
- **Bookmarks Add:** Add to MyDocuments– Allows the user to add the selected Document to their personal 'MyDocuments' View
- **Groups Add:** Add the selected Document(s) to one or more Groups
- **Groups Remove:** Remove the selected Document(s) to one or more Groups

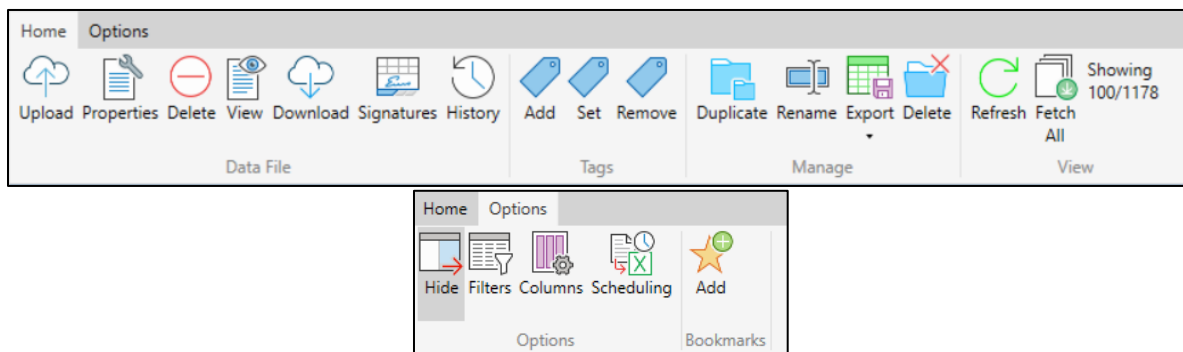
The user may add any Filter to the View and any additional column.

DataFiles View

The SciCord Client supports the storage of generic files, called 'Data Files' throughout the system. Data Files may be uploaded to the system using the SciCord Client or the SciCord Portal. Once a Data File is added to the system it can be used as an attachment in any document and may be shared with other users.



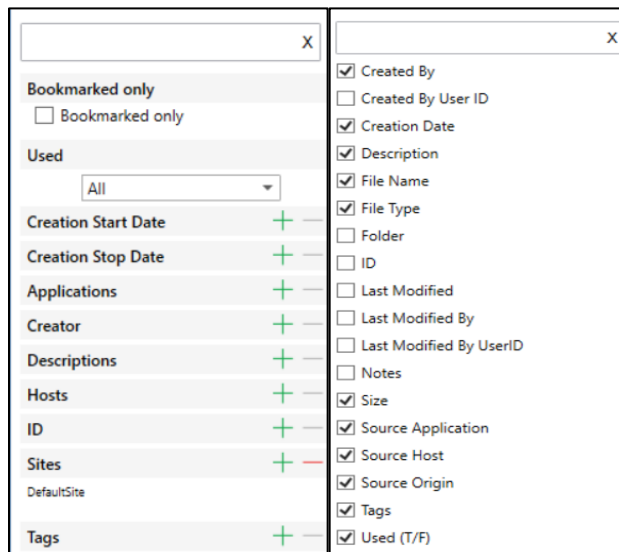
The Icons present in the Data Files view are from left to right:



- **Upload:** DataFile_Create permission required; A dialogue will appear allowing the user to Upload a File, Set Tags, and provide any Notes
- **Properties:** DataFile_Edit permission required; user may change the File Name, Folder, Description, Tags, and Notes of a Data File
- **Delete:** DataFile_Delete permission required; User may Delete any Data File from the System
- **View:** DataFile_View permission required for browsing, inspection, and download of Data Files
- **Download:** The User may Download the Data File
- **Signatures:** view and manage electronic signatures of Data Files
- **History:** view history of data files
- **Tags:** **Add, Set, Remove** Data File tags; depending on the action to perform the following permissions will be required: DataFile_Create, DataFile_Delete, DataFile_Edit, DataFileFolder_Management

*The **Manage** and **View** sections of the **Home** tab are consistent for all views.

Below are the Filter and Column choices provided to the User for sorting Data Files and presenting information that is relevant to the User.



Filters View

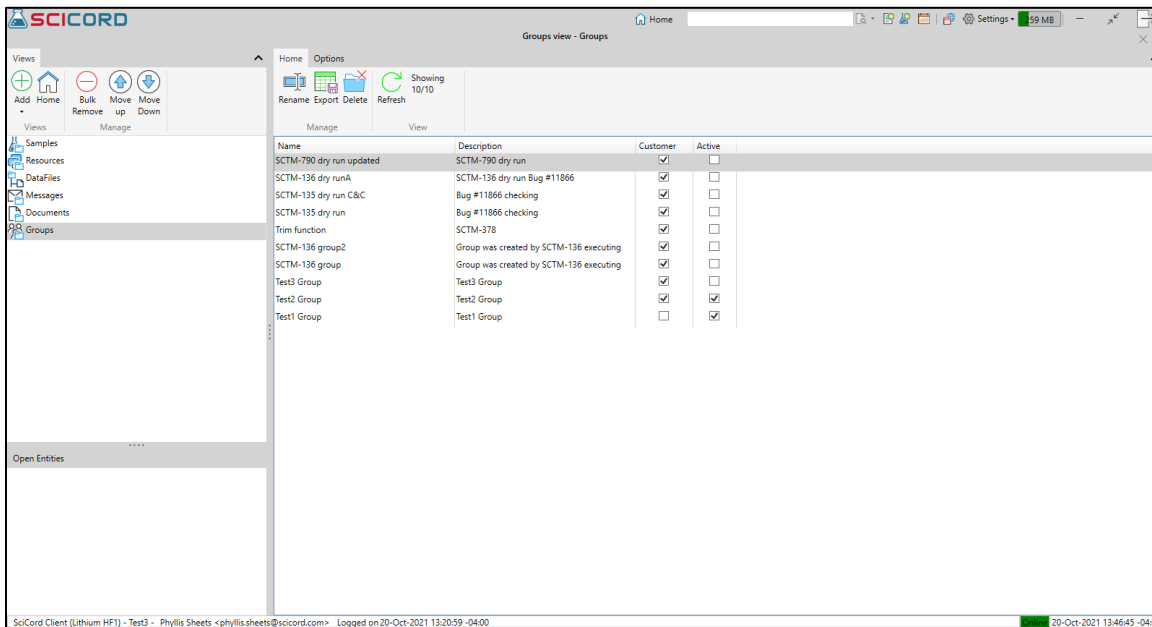
Columns View

Groups View

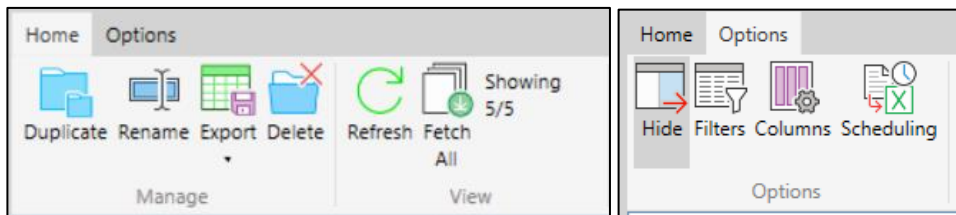
The user can define and manage 'Groups' for the purpose of assigning and filtering entities. Groups are defined in the SciCord Portal by an Administrator, and include the Group Name, a Description, Active flag, and Customer flag.

In the SciCord Client, Users will be able to add, or remove, Documents to all Groups that they are a member of. The user will not be allowed to add, or remove, any Documents to Groups that they are not a member of.

The Groups View shows to the user which Groups that they are a member of.

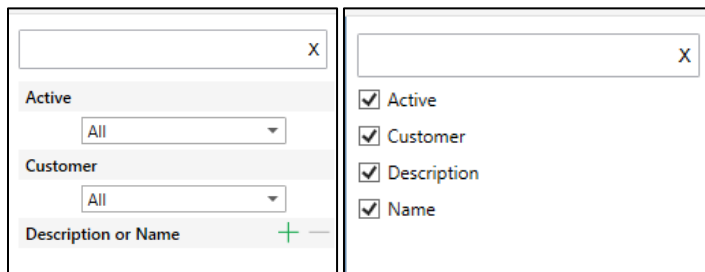


The Icons that are associated with the Groups View are, from left to right:



The action items listed in **Groups view; **Home** and **Options** tab, **Manage**, **View**, and **Options** sections are consistent for all views*

Below are images of the Filters and Columns available to the User in the Groups View:



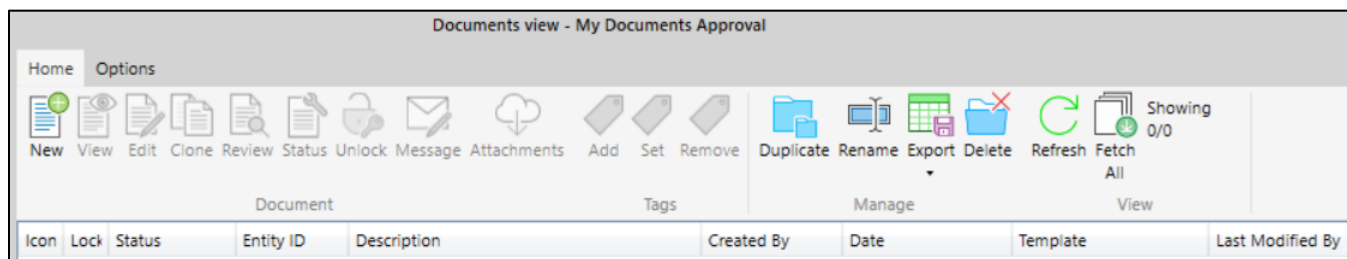
Filters View

Columns View

MyApprove View

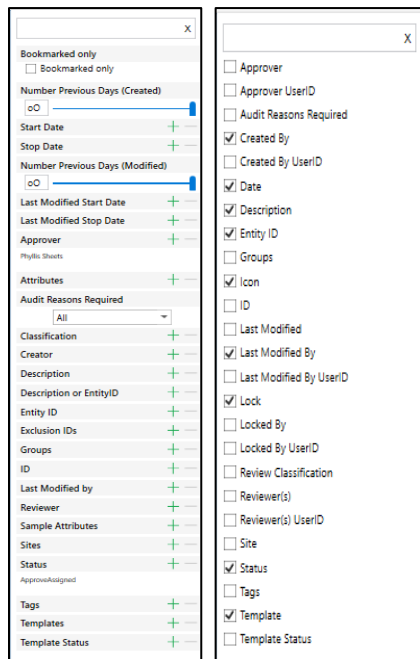
The MyApprove View is a special implementation of a Documents view. This view displays Documents in 'ApproveAssigned' status only, where the assigned approver is the current active User.

A user that is assigned approver of a document, meaning in 'ApproveAssigned' status, the document will appear in the 'MyApprove' View.



**Although many of these icons are viewable, only a few are selectable depending on the users' actions and set permissions*

Below are the Filters and Columns that a user may use to sort and display the details of the MyApprove View.



Filters View

Columns View

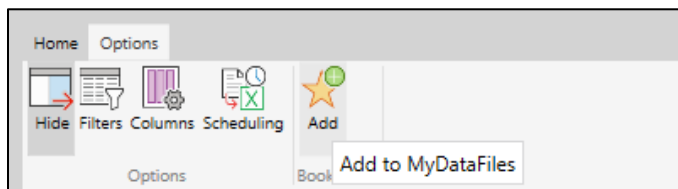
Bookmarking Function

This function allows a user to create a saved shortcut list for the logged user. This feature is in the **Options** tab, **Add Bookmarks**, and contextually when focused on an entity.

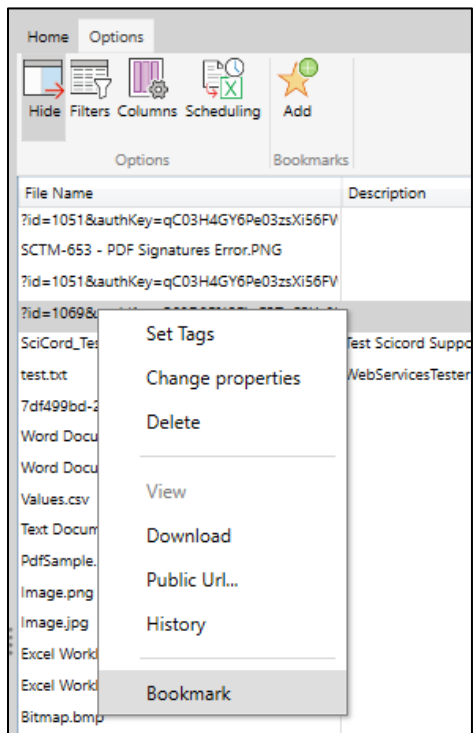
Bookmarks are available for the following views:

- Documents
- Samples
- Data Files
- Resources
- Templates
- Users
- Reports

Once an item is bookmarked it can be viewed in the users 'My' view. (ex: My DataFiles, MyDocuments, etc.)



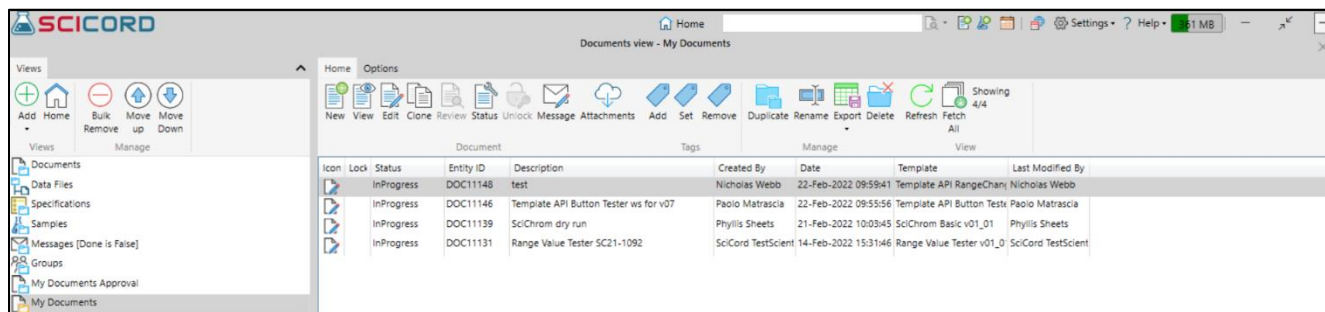
Toolbar view



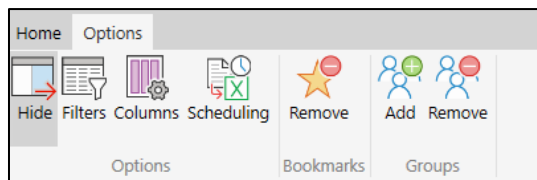
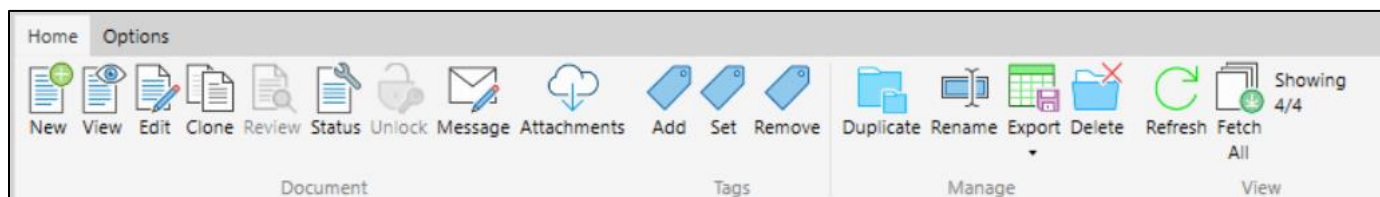
Contextual view

MyDocuments View

The 'My' View is a bookmarking functionality. The user can quickly access and manage Documents that have either been created by the user, or that they decided to include in their MyDocuments View by using the **Bookmark** function.

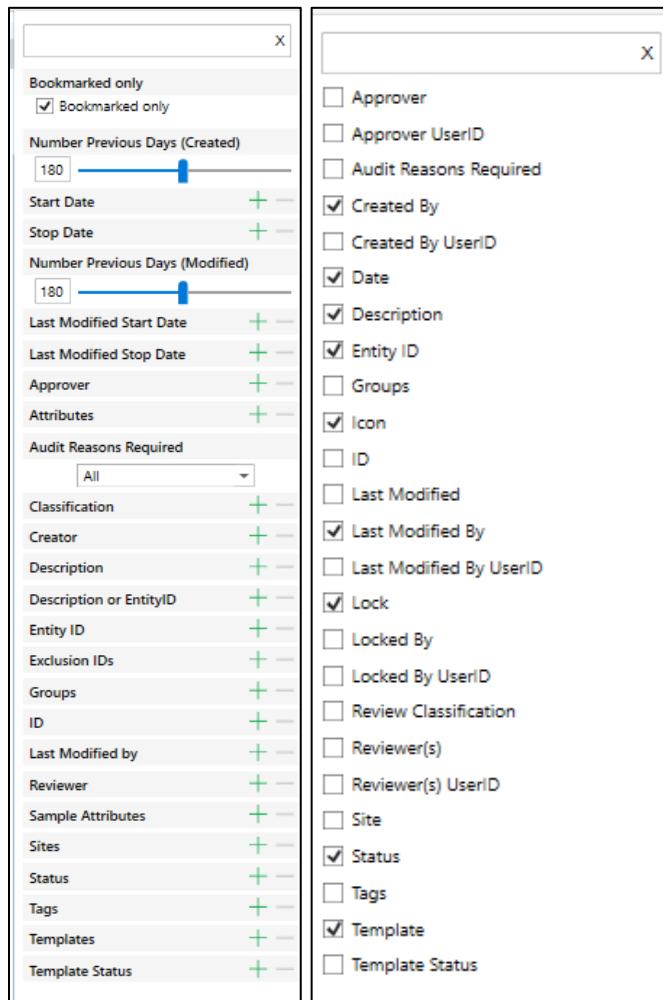


Below are the icons associated with the **Home** and **Options** tab **MyDocuments** View



The **Home and **Options** tab icons available are consistent for Document and MyDocuments views.*

Below are images of the default Filter and Column settings that a user may use to sort and display the details of the **MyDocuments** view.



Filters View

Columns View

MyDataFiles View

The 'My' View is a bookmarking functionality. Using the **MyDataFiles** function the user can include the generic DataFiles into their 'My' View.

The **Bookmark/Add** icon appears in the **Options** tab DataFiles toolbar, or the user can right-click on any Data File and an option to **Bookmark** will be available.

MyResources View

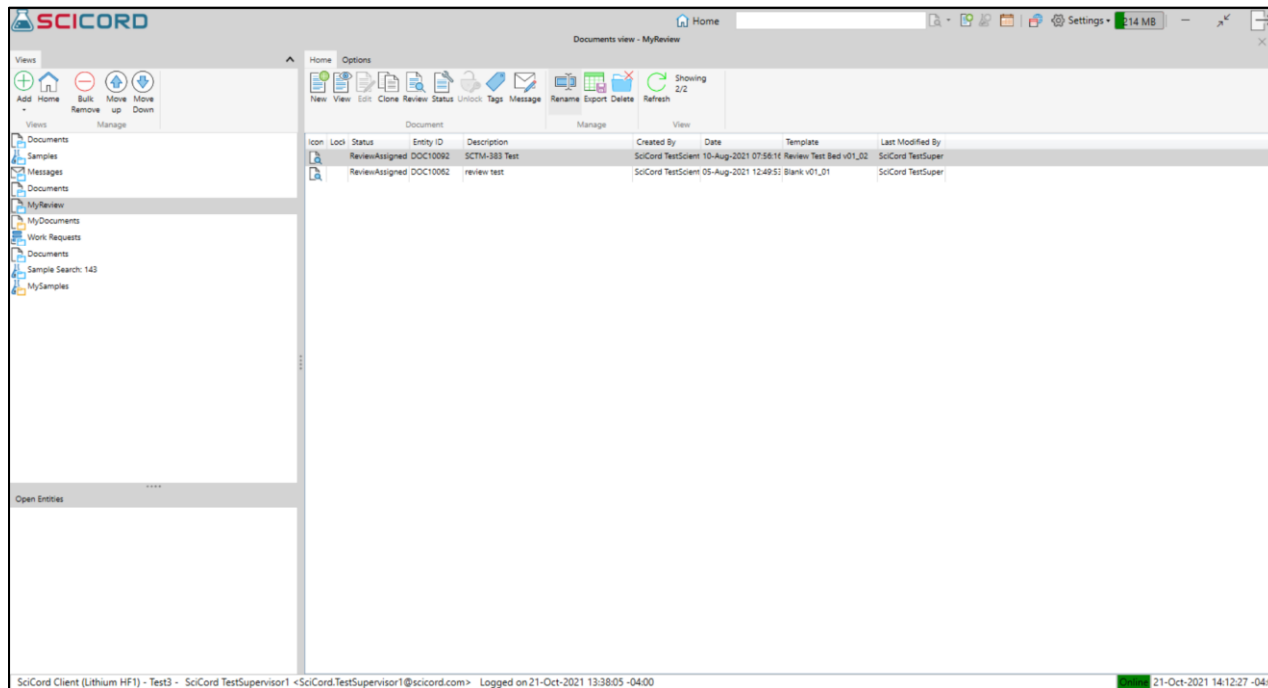
The 'My' View is a bookmarking functionality. The user can quickly access and manage Resources that have either been created by the user or that they decided to include in their MyResources View.

The **Bookmark/Add** icon appears in the **Options** tab DataFiles toolbar, or the user can right-click on any Resource and an option to **Bookmark** will be available.

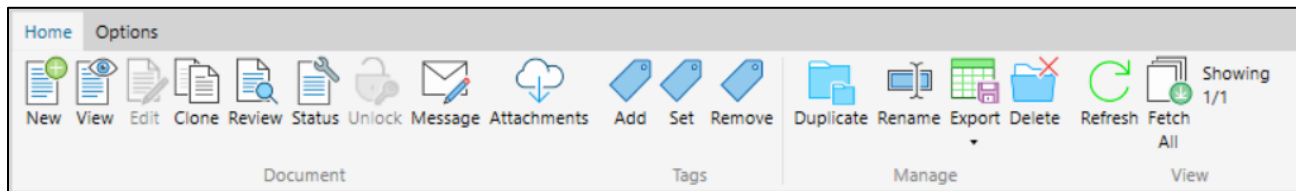
MyReview View

The **MyReview** view is a special implementation of a Documents View. This view displays documents in **ReviewAssigned** status only, where the assigned reviewer is the current active user.

The 'My' View is a bookmarking functionality. The user can quickly access and manage Documents assigned to them for review.



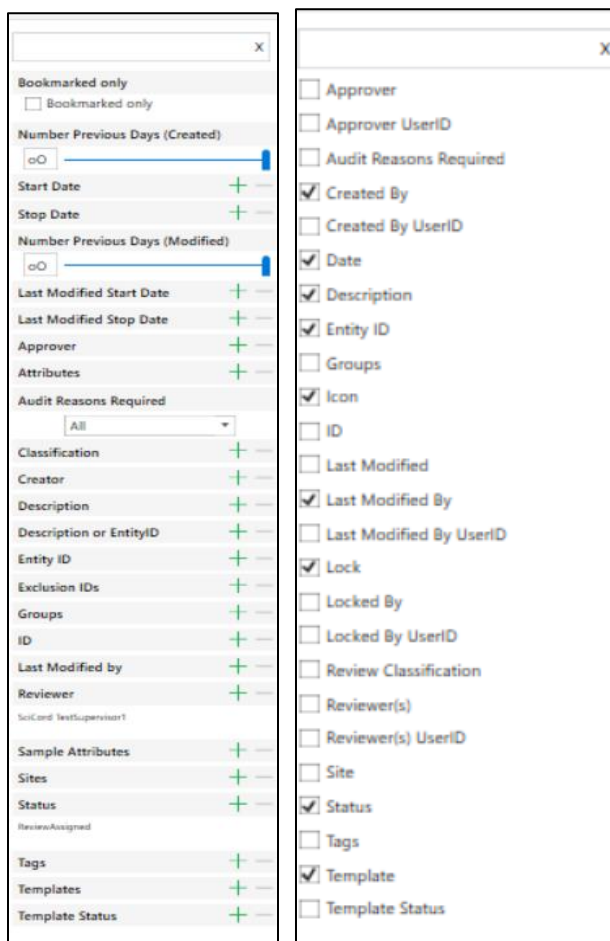
The Icons in the MyReview View toolbar can be seen below:



Important Icons are the 'Open Document for Review', the 'Modify Document Status', and potentially the 'Create a message for the selected Document'. These icons allow the Reviewer to:

- open the Document to complete Review
- to modify the Status
- and to write a message to the Users involved with the Document

Below are the Filters and Columns available for selection in the MyReview View:



Filters View

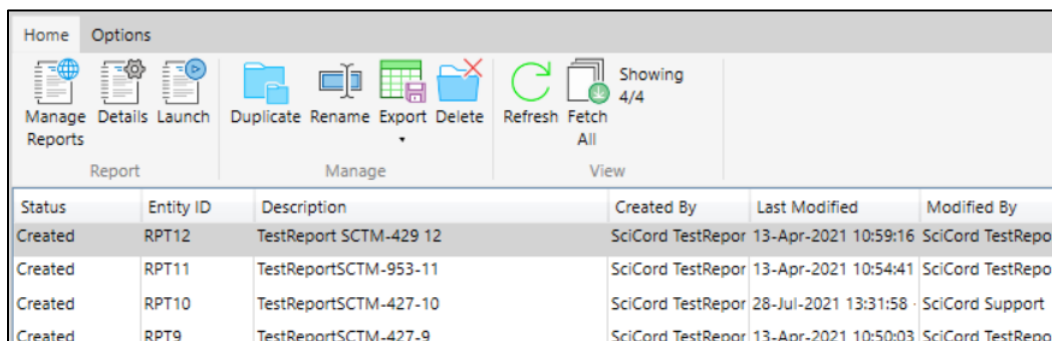
Columns View

My Reports View

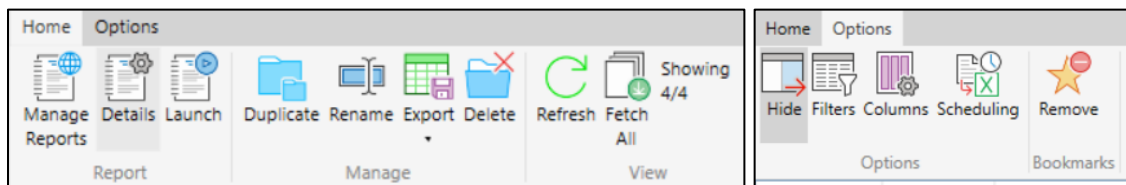
The 'My' View is a bookmarking functionality. The user can quickly access and manage Reports that have either been created by the user, or that they decided to include in their MyReports View.

By using the **Bookmark** function the user can include Reports into their 'My' View. The **Bookmark** icon appears in the **Reports** toolbar, or the user can right-click on any **Reports** in the **Reports** View and an option to **Bookmark** will be available for selection.

The action items listed in **MyReports view; the **Home** and **Options** tab, **Manage**, **View**, and **Options** sections are consistent for all views*

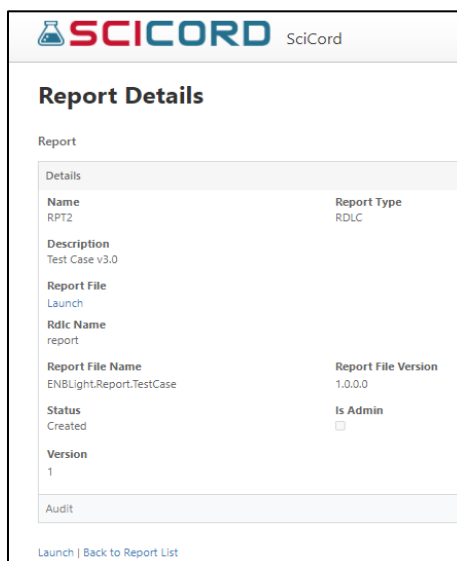


Status	Entity ID	Description	Created By	Last Modified	Modified By
Created	RPT12	TestReport SCTM-429 12	SciCord TestRepor	13-Apr-2021 10:59:16	SciCord TestRepor
Created	RPT11	TestReportSCTM-953-11	SciCord TestRepor	13-Apr-2021 10:54:41	SciCord TestRepor
Created	RPT10	TestReportSCTM-427-10	SciCord TestRepor	28-Jul-2021 13:31:58	SciCord Support
Created	RPT9	TestReportSCTM-427-9	SciCord TestRepor	13-Apr-2021 10:50:03	SciCord TestRepor



Home toolbar, **Reports** section, functions:

- **Manage Reports:** action will open the SciCord Portal Reports Index page
- **Details:** action will open the SciCord Portal Report Details page to show Report Name, Report Type, Description, Report File – Launch option, Rdlc Name, Report File Name, Report File Version, Status, Is Admin checkbox, and Version information.



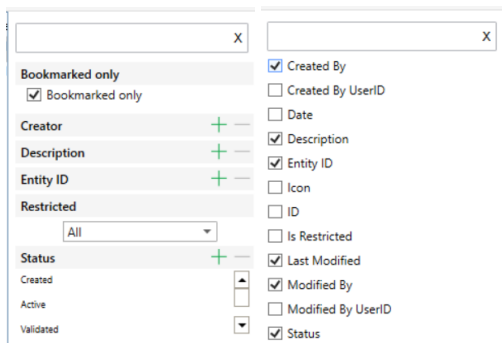
Report Details	
Report	
Details	
Name	Report Type
RPT2	RDLC
Description	
Test Case v3.0	
Report File	
Launch	
Rdlc Name	
report	
Report File Name	Report File Version
ENBLight.Report.TestCase	1.0.0.0
Status	Is Admin
Created	<input type="checkbox"/>
Version	
1	
Audit	
Launch Back to Report List	

- Launch:** action will open the **SciCord Portal Report Configuration** details with fields for Date From, Date To, drop list for Category, drop list for Site, Show button, Report File Name, Report File Version, Report File Upload Date, and Report File Uploader.



The screenshot shows the SciCord interface for configuring a report. At the top, it says 'Report "Test Case v3.0"' and 'TestCase Report v03 - Shows Environment Config records'. Below this are several input fields: 'Date From' (25-Aug-2021), 'Date To' (25-Sep-2021), 'Category' (All), and 'Site' (All). A 'Show' button is located below these fields. At the bottom, there are four key-value pairs: 'Report File Name' (ENBLight.Report.TestCase), 'Report File Version' (1.0.0.0), 'Report File Upload Date' (12-Aug-2021 13:18:21 +00:00), and 'Report File Uploader' (SciCord Support <SciCordSupport@scicord.com>).

The Filters and Columns for MyReports Views are displayed here:



The screenshot shows two side-by-side panels for configuring MyReports Views. The left panel, labeled 'Filter view', has a search box and a list of filter categories: 'Bookmarked only' (with a checked 'Bookmarked only' option), 'Creator', 'Description', 'Entity ID', 'Restricted' (with a dropdown set to 'All'), and 'Status' (with a dropdown showing 'Created', 'Active', and 'Validated'). The right panel, labeled 'Columns view', has a search box and a list of columns with checkboxes: 'Created By' (checked), 'Created By UserID', 'Date', 'Description' (checked), 'Entity ID' (checked), 'Icon', 'ID', 'Is Restricted', 'Last Modified' (checked), 'Modified By' (checked), 'Modified By UserID', and 'Status' (checked).

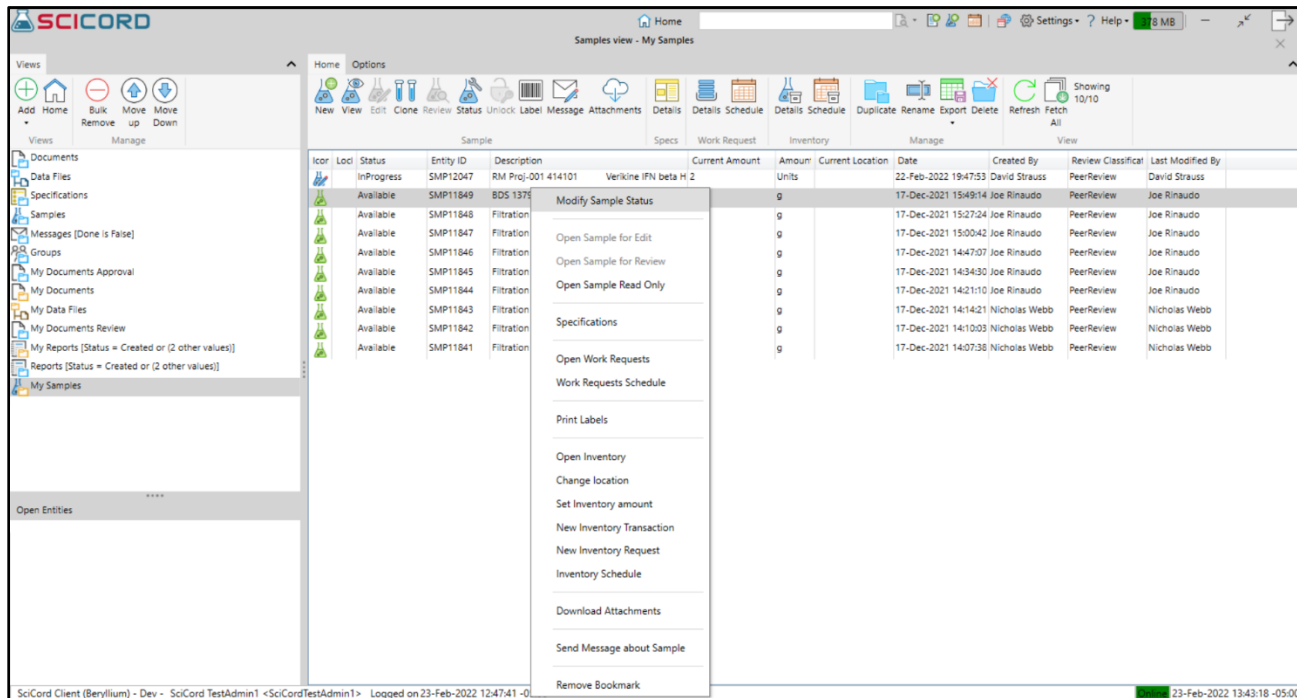
Filter view

Columns view

MySamples View

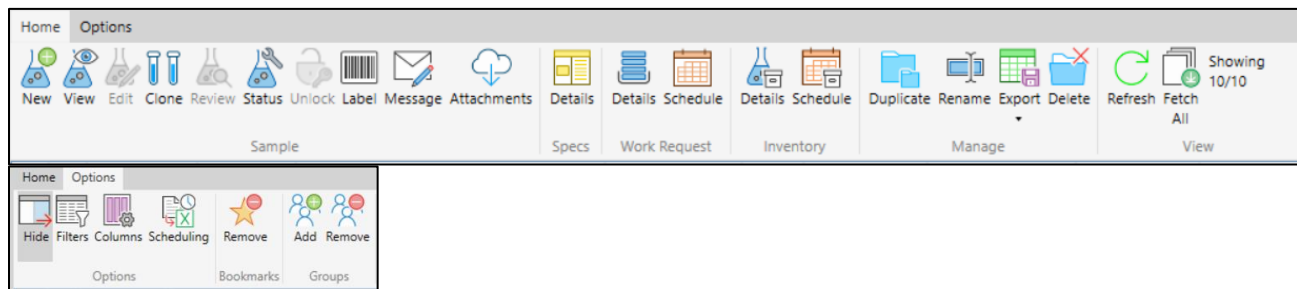
The 'My' View is a bookmarking functionality. The user can quickly access and manage Samples that have either been created by the user, or that they decided to include in their MySamples View.

By using the 'Add to MySamples' function the user can include Samples into their 'My' View. The 'Add to MySamples' icon appears in the Samples toolbar, or the user can right-click on any Sample in the Samples View and an option to 'Add to MySamples' will be available for selection



MySamples view with contextual view menu options

Below are the icons present in the MySamples View:



From the MySamples Toolbar the User can:

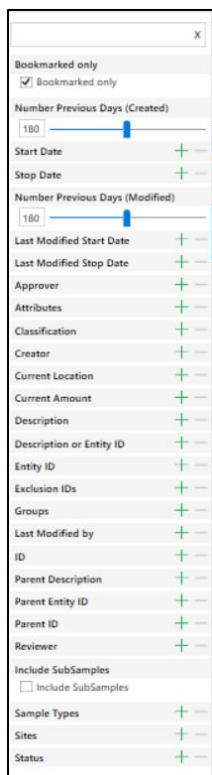
- **New** – create a new sample
- **View** a Sample
- **Clone** a sample
- Modify Sample **Status**
- **Label** – create a label for sample
- Send **Message** about the **Sample**
- **Attachments** – download an attachment for selected sample
- **Specification Details** with options to **Save, Add, Close, or Refresh, or Export**. User will also have the option to **Toggle** the details of multiple **Specification**

- **Work Request Details** - with options to **Save, Add, Close, Refresh, Export, View and Edit** (dependent upon SampleWorkRequest_Edit permission) **Sample**
- **Work Request Schedule** – displays a calendar view of **Work Requests** for selected **Sample**
- **Inventory Details - Home and Tools** tab view with options to **Close, Refresh, Toggle, Export Transactions and Requests**
- **Inventory Schedule** – Calendar view of **Inventory Transactions**

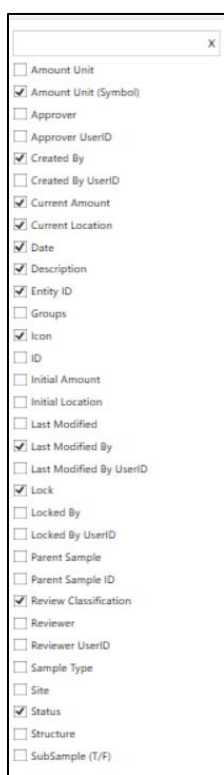
The action items listed in **MySamples view; **Home** tab, **Manage** and **View** sections are consistent for all views*

Options tab functions: The user may also **Remove Bookmark** and **Add** or **Remove Samples** from the **MySamples Groups** View.

Below are the Filters and Columns that may be selected by the user to sort and display MySample Details:



Filters View

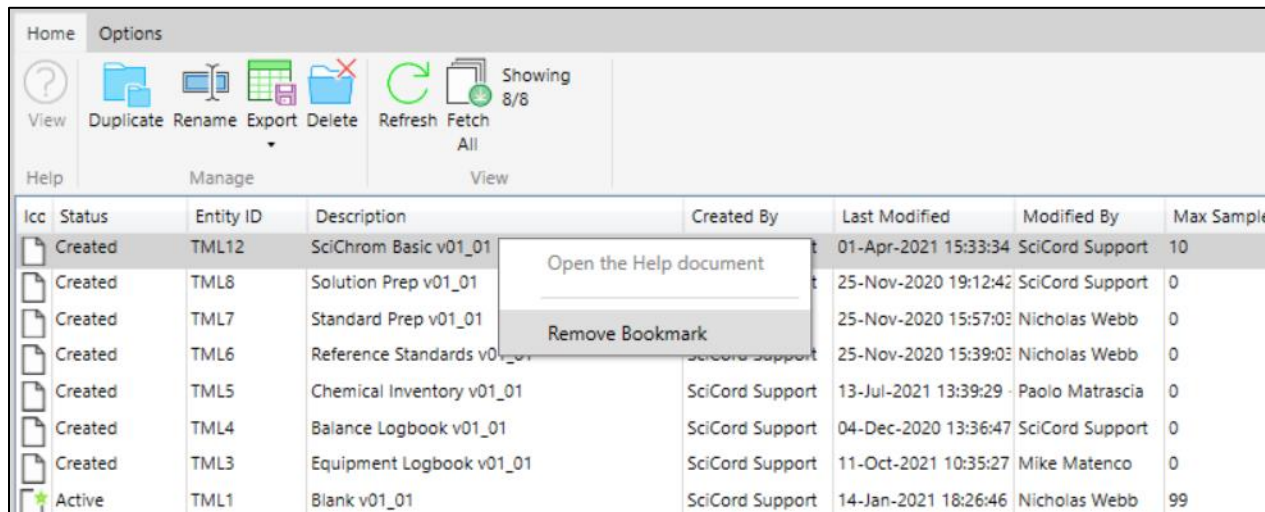


Columns View

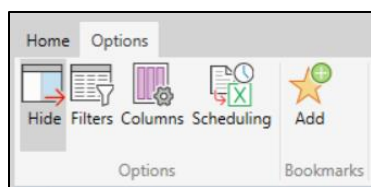
MyTemplates View

The 'My' View is a bookmarking functionality. The user can quickly access and manage Templates that the user decides to include in their **MyTemplates** View.

The user can go to **Options** tab, **Bookmarks Add** or, right-click on any Template in the Template View and an option to **Bookmark** will be available to add the selection to **MyTemplates** view.



Icon	Status	Entity ID	Description	Created By	Last Modified	Modified By	Max Sample
	Created	TML12	SciChrom Basic v01_01	SciCord Support	01-Apr-2021 15:33:34	SciCord Support	10
	Created	TML8	Solution Prep v01_01	SciCord Support	25-Nov-2020 19:12:42	SciCord Support	0
	Created	TML7	Standard Prep v01_01	SciCord Support	25-Nov-2020 15:57:03	Nicholas Webb	0
	Created	TML6	Reference Standards v01_01	SciCord Support	25-Nov-2020 15:39:03	Nicholas Webb	0
	Created	TML5	Chemical Inventory v01_01	SciCord Support	13-Jul-2021 13:39:29	Paolo Matraschia	0
	Created	TML4	Balance Logbook v01_01	SciCord Support	04-Dec-2020 13:36:47	SciCord Support	0
	Created	TML3	Equipment Logbook v01_01	SciCord Support	11-Oct-2021 10:35:27	Mike Matenco	0
	Active	TML1	Blank v01_01	SciCord Support	14-Jan-2021 18:26:46	Nicholas Webb	99

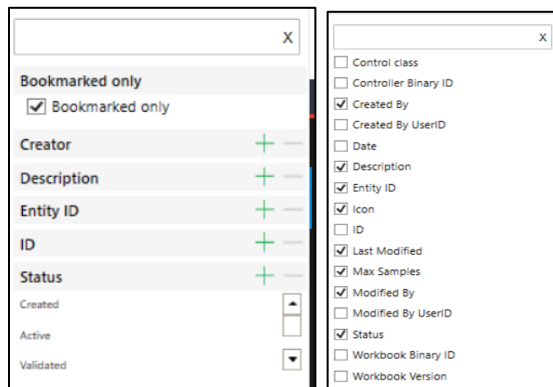


The **MyTemplates** Toolbar:

- **Help** – if a Help document is associated to a template this action will open the document
- **Duplicate** – create a copy of the current view
- **Rename** – Rename the templates view shown in the **Views** pane
- **Export** – export the MyTemplates view as an excel worksheet
- **Delete** – action to delete the MyTemplates view currently shown
- **Refresh** – refreshes the current view
- **Fetch All** - the current # of templates being shown/the # of templates in the SciCord Client

**Options tab functions are consistent with other 'My' views.*

The Filters and Columns available to the User for the MyTemplates view are seen below:



Filters View

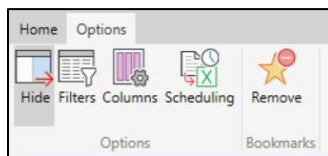
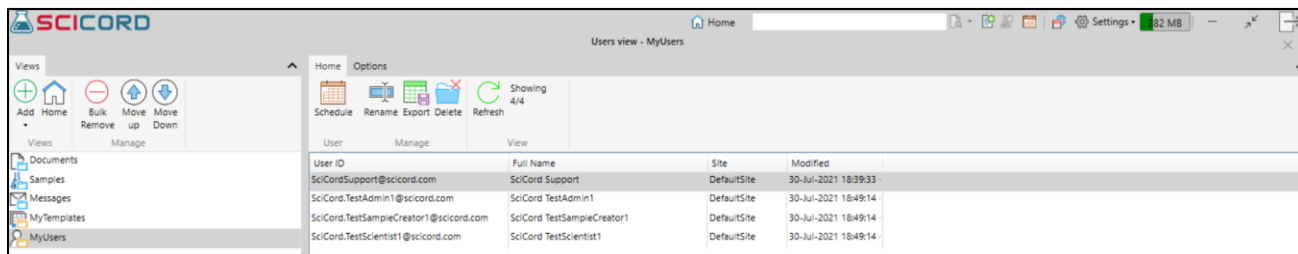
Columns View

MyUsers View

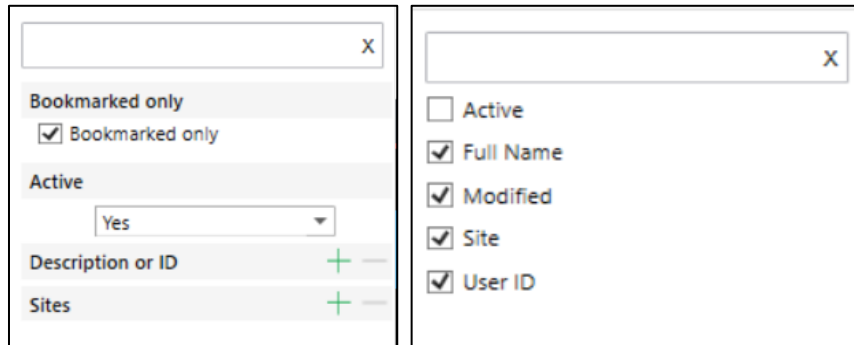
The 'My' View is a bookmarking functionality. The user can quickly access and manage Templates that the user decides to include in their **MyUsers** View.

The user can go to **Options** tab, **Bookmarks Add** or, right-click on any User in the **MyUsers** View and an option to **Bookmark** will be available to add the selection to **MyUsers** view.

The **Schedule** function will open a calendar view of the users **Work Request** schedule. All other functions are the same as other 'My' views.

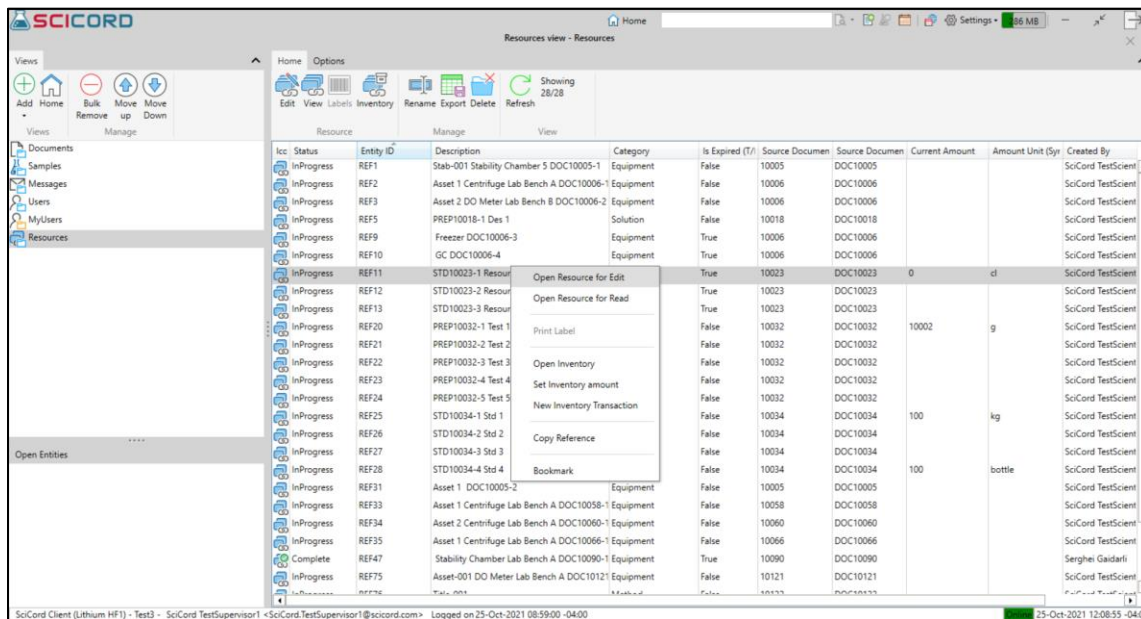


Below are the Filters and Columns available to the User to filter and display User details.

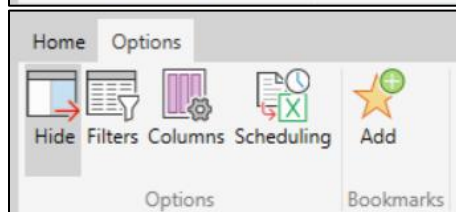
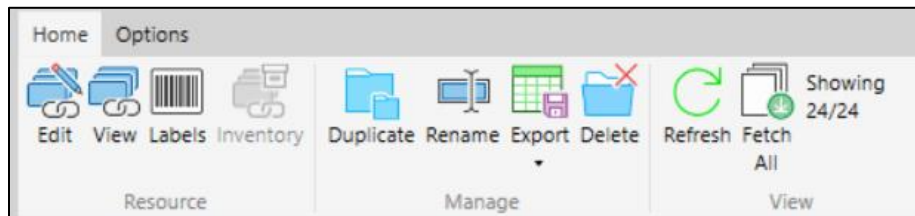


Resources View

The Resources View implements a specific filtered and customizable view for Resources that are available in the SciCord System. Users may add new Resources views and rename at their pleasure; this can be an advantage when the user wants to create a filtered list of Resources. Resources are initially restricted to the User's Site. These Resources can be copied to the Client Clipboard and referenced within Documents on the Client.



Below is the Resources View Toolbar.

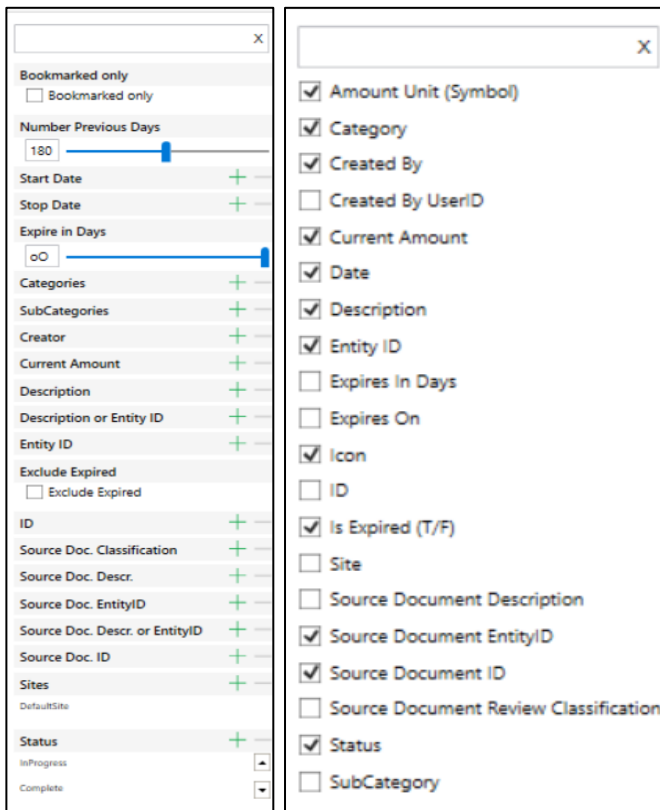


The Resources Toolbar includes, from left to right, functions:

- **Edit** – action will open the source document for edit
- **View** – action will open the source document for view
- **Labels** – action will print labels for selected resource
- **Inventory** – action will open the inventory and associated transactions for the resource

All functions in the **Manage, **View**, **Options**, and **Bookmarks** are consistent within the SciCord Client.*

Below are the Filters and Columns that may be used by the User to sort and display Resource details.

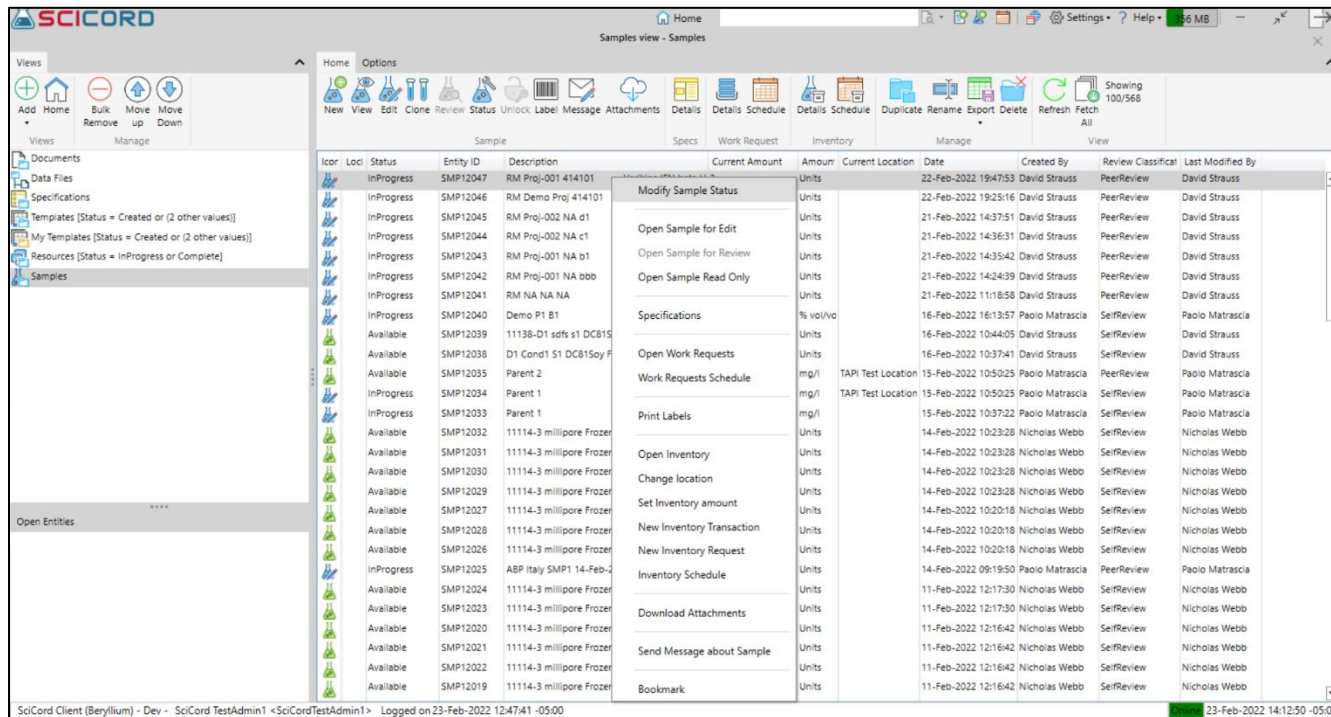


Filters View

Columns View

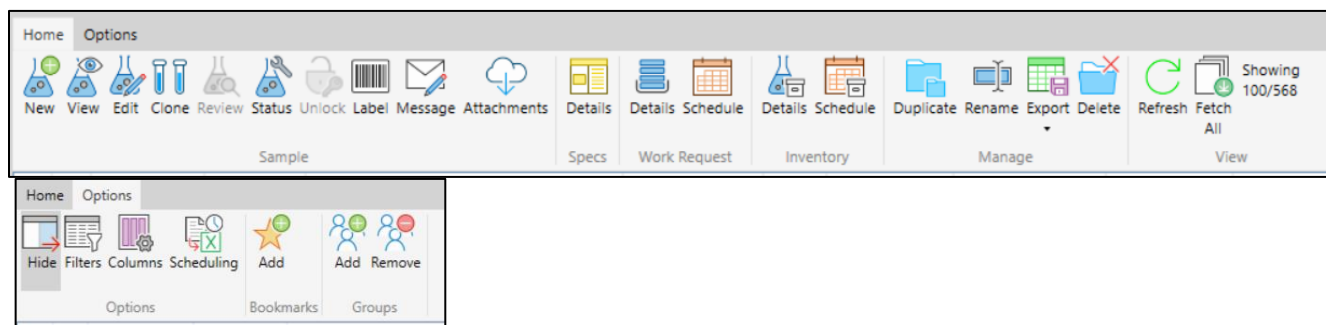
Samples View

The Samples view implements a specific filtered and customizable view for Samples that are in the SciCord System. The Samples that appear in the Samples View are initially restricted to the User's Site.



Samples View shown with contextual menu options

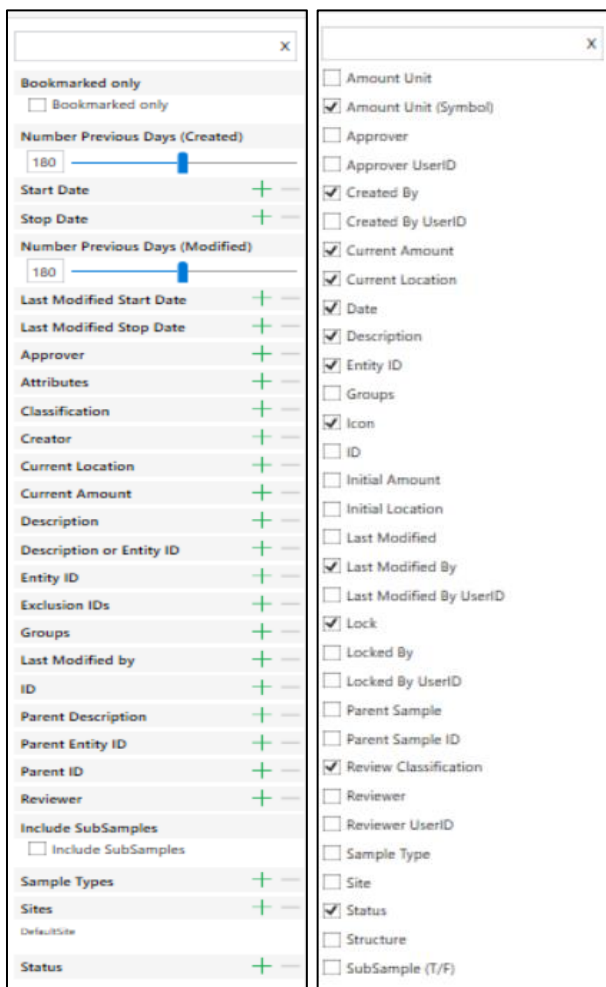
The Samples View Toolbar includes the following Icons:



- **New** – action to create a new sample
- **View** – action to view a selected sample
- **Edit**- action to open sample for edit
- **Clone** – action to clone the selected sample
- **Review** – if the user is assigned as sample reviewer, this action is enabled
- **Status** – action to modify the sample status
- **Unlock** – action to unlock a selected sample
- **Label** – print labels for selected sample
- **Message** – create and send messages for selected sample

The **Specifications, Work Requests, Inventory, Manage, and View sections** of the **Home** tab are consistent and previously covered in the **MySamples** view.

Below are the Filters and Columns that may be used by the User to sort and display the Sample details

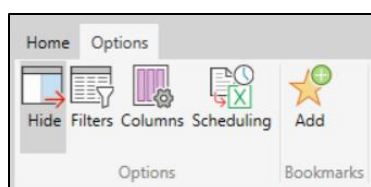
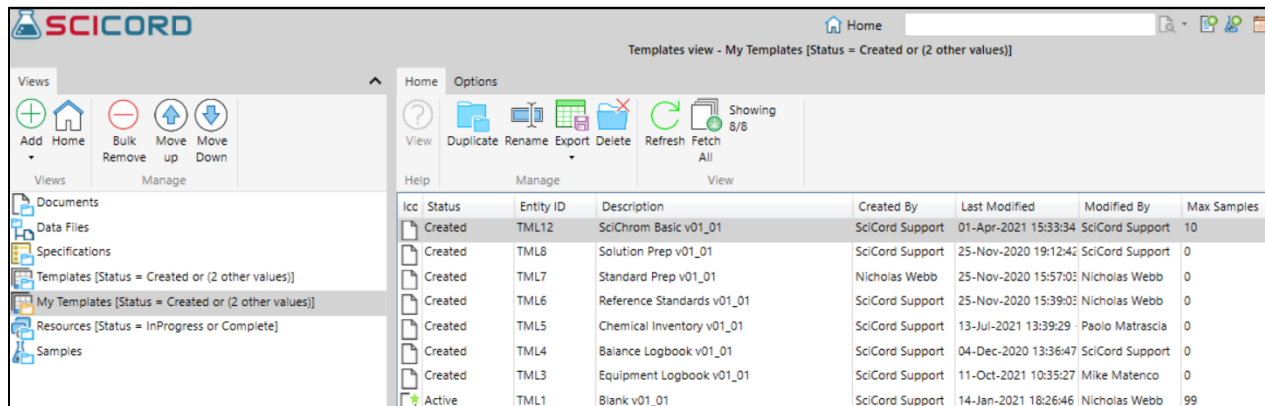


Filters View

Columns View

Templates View

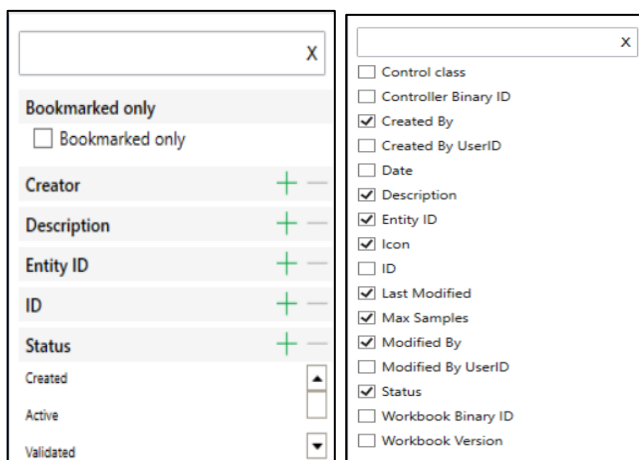
The Templates View is a list of all the Templates in the SciCord System that are available to the user. The View will show the Status of the Template as Created, Active, Validated, or Inactive. The user can create multiple Templates Views and rename them as the user pleases.



The **MyTemplates** Toolbar:

- **Help** – if a Help document is associated to a template this action will open the document
- **Duplicate** – use to create a copy of the current view
- **Rename** – Rename the templates view shown in the **Views** pane
- **Export** – export the MyTemplates view as an excel worksheet
- **Delete** – action to delete the MyTemplates view currently shown
- **Refresh** – refreshes the current view
- **Fetch All** - the current # of templates being shown/the # of templates in the SciCord Client

Below are the Filters and Columns that the User may use to sort and display the Template details.

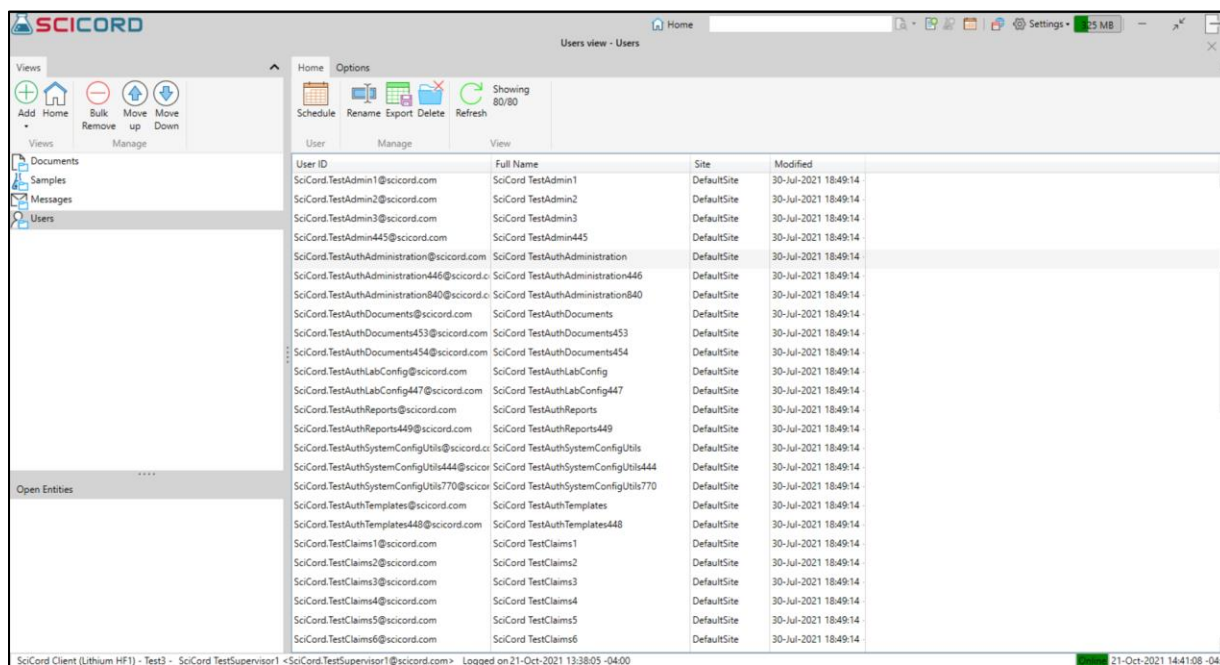


Filters View

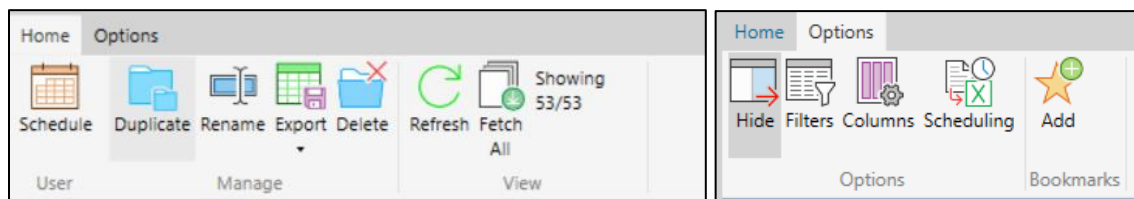
Columns View

Users View

The Users View implements a specific filtered and customizable View of the Users that are in the SciCord System.



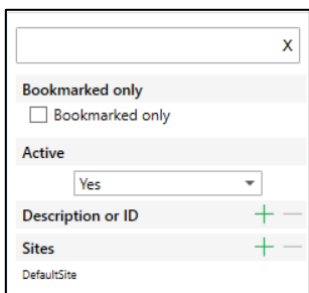
Below are the toolbar functions associated with the Users View.



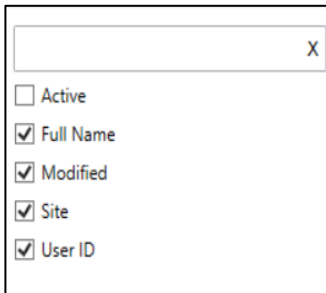
- **Schedule** – action will open the selected users **Work Request** schedule.

All other sections in the **Home and **Options** tab are consistent with **MyUsers** view previously discussed.*

Below are the Filters and Columns associated with the Users View.



Filters View

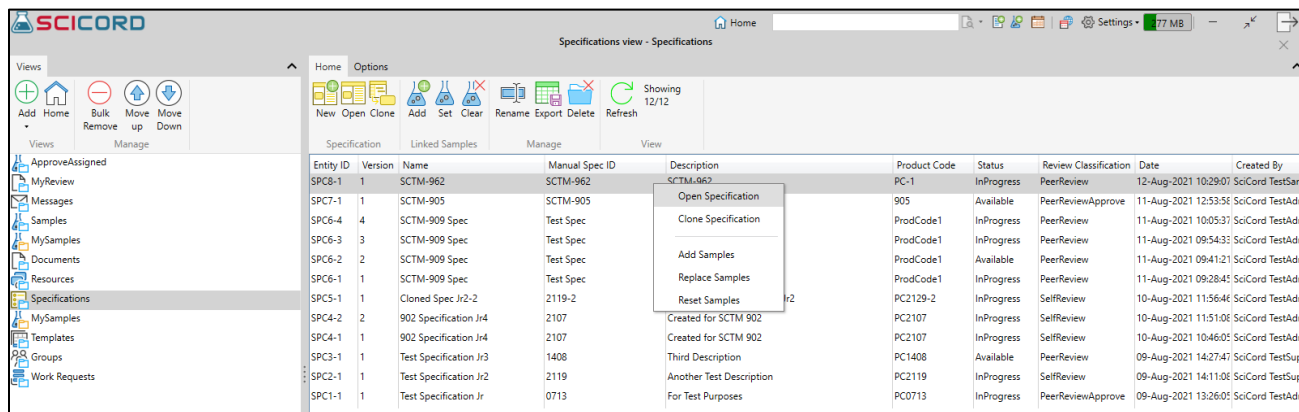


Columns View

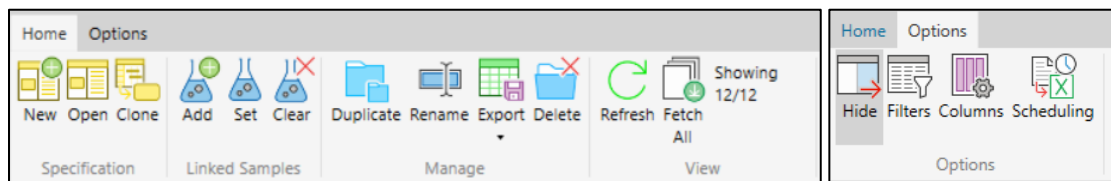
Specifications View

The Specifications view implements a specific filtered and customizable view for Specifications that are in the SciCord System. The Specifications that appear in the Specifications View are initially filtered to the User's Site.

The View will show the Entity ID, Version, Name, Manual Spec ID, Description, Product Code, Status, Review Classification, Date and Creator of the Specification. The user can create multiple Specification Views and rename them as the user pleases.

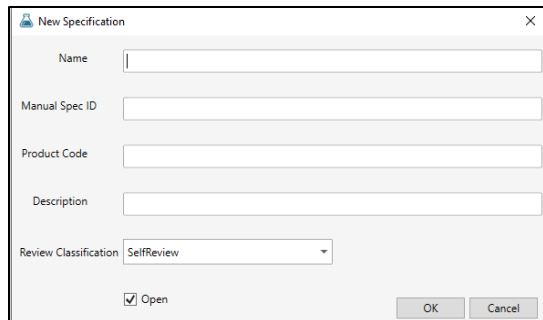


Specification's view shown with contextual options



The **Home** toolbar functions are -

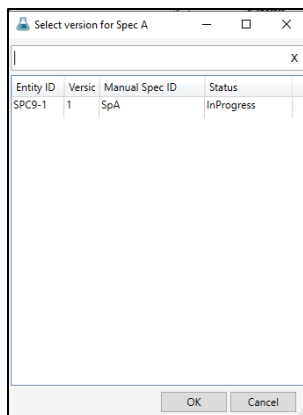
Specification:



New Specification dialog

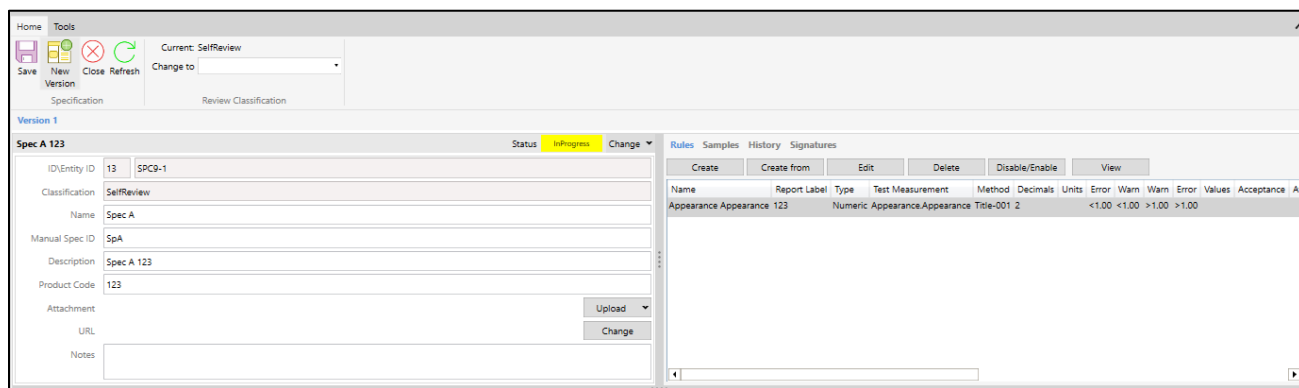
- **New** – Dialog for new specification includes, Name, Manual Spec ID, Product Code, Description, Review Classification drop list with selections for SelfReview, PeerReview, PeerReviewApprove. An Open checkbox to have the Specification open for edit.

- **Clone** – opens a dialog to select and clone a sample



- **Open** – open the specification for edit has fields for:
 - **Toolbar options for: Specification** section - **Save, New Version, Close, Refresh** and **Review Classification** section with drop list option to change the review classifications. A tab with the **Version** is located above the specification name.
 - Information on the left side of the Specification view pane:
 - **ID/Entity ID**
 - **Classification**
 - **Name**
 - **Manual Spec ID**
 - **Description**

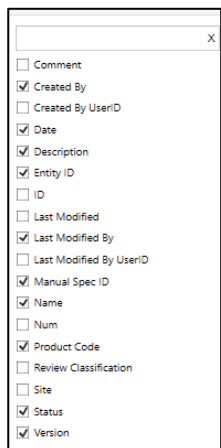
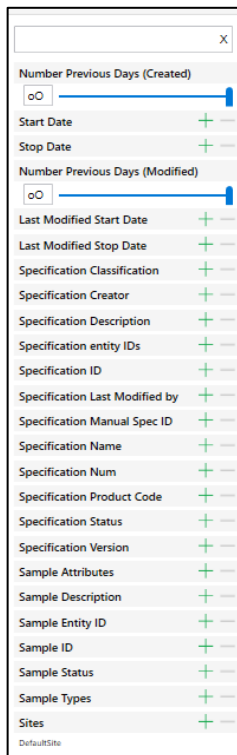
- **Product Code**
- **Attachment** – Upload from local file or a Data File
- **URL** – option to Change the URL button
- **Notes** – free text field



Open Specification showing all attributes

All other sections in the **Home and **Options** tab are consistent with all views.*

Below are the default Filters and Columns associated with the Specifications View:



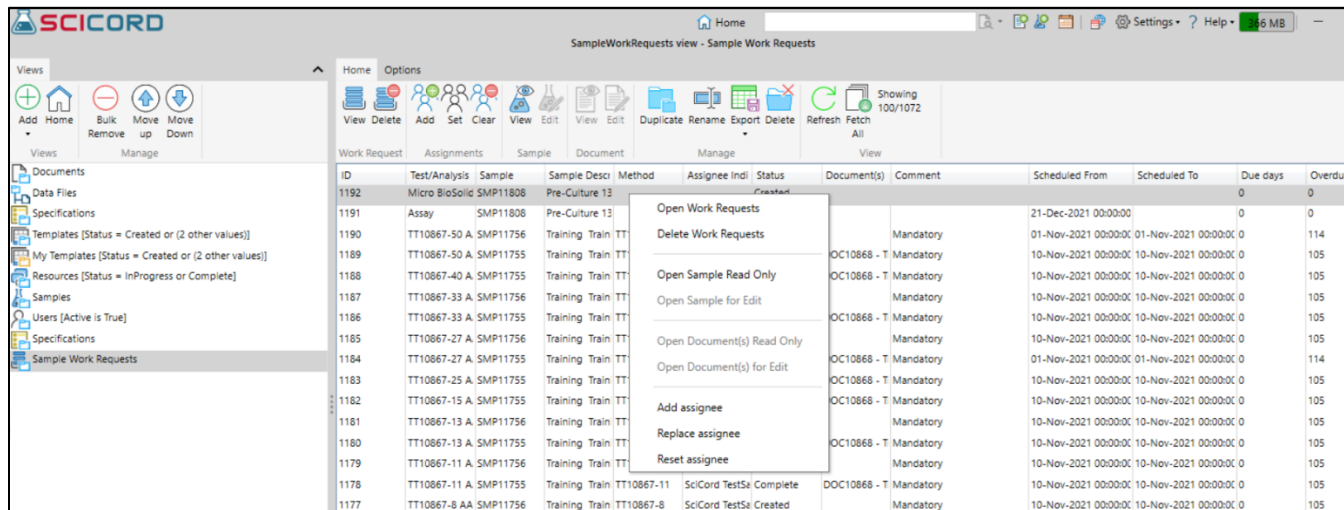
Filter's view

Columns view

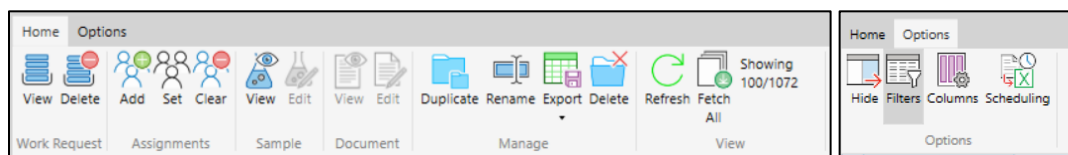
Work Requests View

The Work Requests view implements a specific filtered and customizable view for Work Requests that are in the SciCord System. The Work Requests that appear in the Work Requests View are initially filtered to the User's Site.

The View will show the Entity ID, Test Analysis, Sample, Sample Description, Method, Assignees, Status, Experiments, Comments, Scheduled From, Scheduled To, Due Days, Overdue days, Replicates, Hours expected, Hours spent, Date, Created By, Last Modified By. The user can create multiple Work Requests Views and rename them as the user pleases.



Sample Work Request View

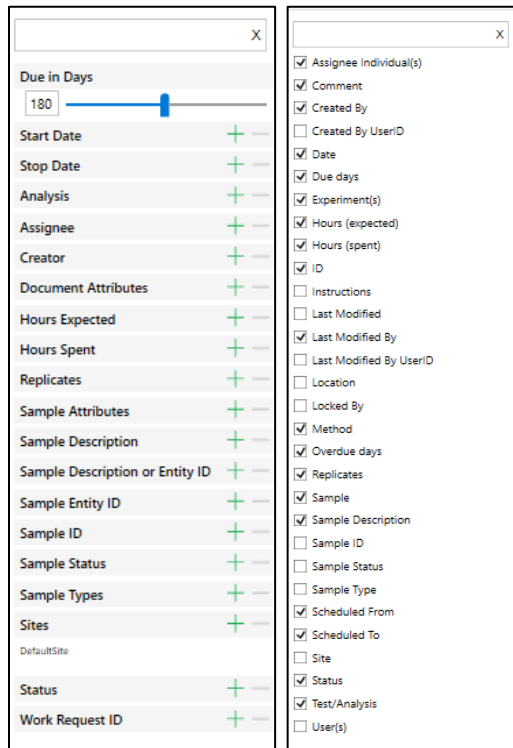


The **Home** toolbar functions are -

- **Work Request Section –**
 - **View:** selection will open the Work Request in read only mode
 - **Delete:** action will open a dialog asking if the user is sure they want to delete the selected work request. Button to select Yes or No.
- **Assignments Section -**
 - **Add:** selecting a work request select **Add** will open a dialog to select a user to add to the **Work Request**. A checkbox is available for **“Only my site”**
 - **Set:** action will replace a user that is assigned to a Work Request with another user by opening a dialog box to select a different user.
 - **Clear:** will reset all assignees associated to the selected **Work Request**
- **Sample Section -**
 - **View:** opens the sample in read only mode
 - **Edit:** opens the sample for edit
- **Document Section -**
 - **View:** opens the document in read only mode
 - **Edit:** opens the document for edit

All other sections in the **Home and **Options** tab are consistent with all views.*

Below are the default Filters and Columns associated with the Work Requests View:



The left screenshot shows the 'Filter's view' with a 'Due in Days' slider set to 180 and a list of filterable fields including Start Date, Stop Date, Analysis, Assignee, Creator, Document Attributes, Hours Expected, Hours Spent, Replicates, Sample Attributes, Sample Description, Sample Description or Entity ID, Sample Entity ID, Sample ID, Sample Status, Sample Types, Sites, Status, and Work Request ID.

The right screenshot shows the 'Column's view' with a list of selectable columns including Assignee Individual(s), Comment, Created By, Date, Due days, Experiment(s), Hours (expected), Hours (spent), ID, Instructions, Last Modified, Last Modified By, Last Modified By UserID, Location, Locked By, Method, Overdue days, Replicates, Sample, Sample Description, Sample ID, Sample Status, Sample Type, Scheduled From, Scheduled To, Site, Status, Test/Analysis, and User(s).

Filter's view

Column's view

Reports View

The Reports view implements a specific filtered and customizable view for Reports that are in the SciCord System. The Reports that appear in the Reports View are initially filtered to the User's Site.

Reports view - Reports [Status = Created or (2 other values)]

Home Options

Manage Reports Details Launch Duplicate Rename Export Delete Refresh Fetch All

Status	Entity ID	Description	Created By	Last Modified	Modified By
Created	RPT24	Paolo Tests - DO NOT USE	SciCord Support	07-Jan-2022 17:50:00	SciCord Support
Created	RPT23	ABP Surface Water Report	Joe Rinaudo	07-Jan-2022 18:33:54	Joe Rinaudo
Created	RPT22	GBT Upstream Report	David Strauss	07-Jan-2022 15:02:13	David Strauss
Active	RPT21	Report with Filters	Paolo Matraschia	06-Jan-2022 14:46:13	Paolo Matraschia
Created	RPT20	Cahir Final CoFA with Bob's signatures v0	Joe Rinaudo	20-Dec-2021 18:54:29	Joe Rinaudo
Created	RPT19	ABP Cahir Final CoFA Report	David Strauss	16-Sep-2021 12:13:09	David Strauss
Created	RPT18	ABP AER Cahir Final Effluent 2021 Report	David Strauss	16-Sep-2021 13:23:32	David Strauss
Created	RPT17	ABP ERF 6.2A New EMR Cahir 2021 Report	David Strauss	16-Sep-2021 13:50:17	David Strauss
Created	RPT16	Equipment list Calibration Duo in 31 days	David Strauss	24-Jun-2021 19:27:34	David Strauss

Report's view

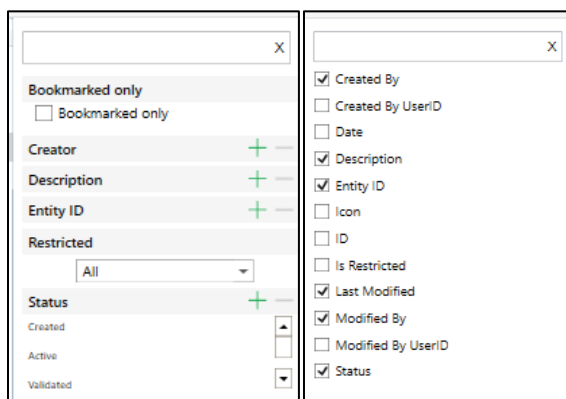


The Home toolbar shows:

- **Reports section:**
 - **Manage Reports** - opens the SciCord Portal Reports Index
 - **Details:** opens the SciCord Portal Report Details page of the selected report
 - **Launch:** opens the SciCord Portal report configuration page and a **Show** button.

All other sections in the **Home and **Options** tab are consistent with all views.*

Below are the default Filters and Columns associated with the Reports View:

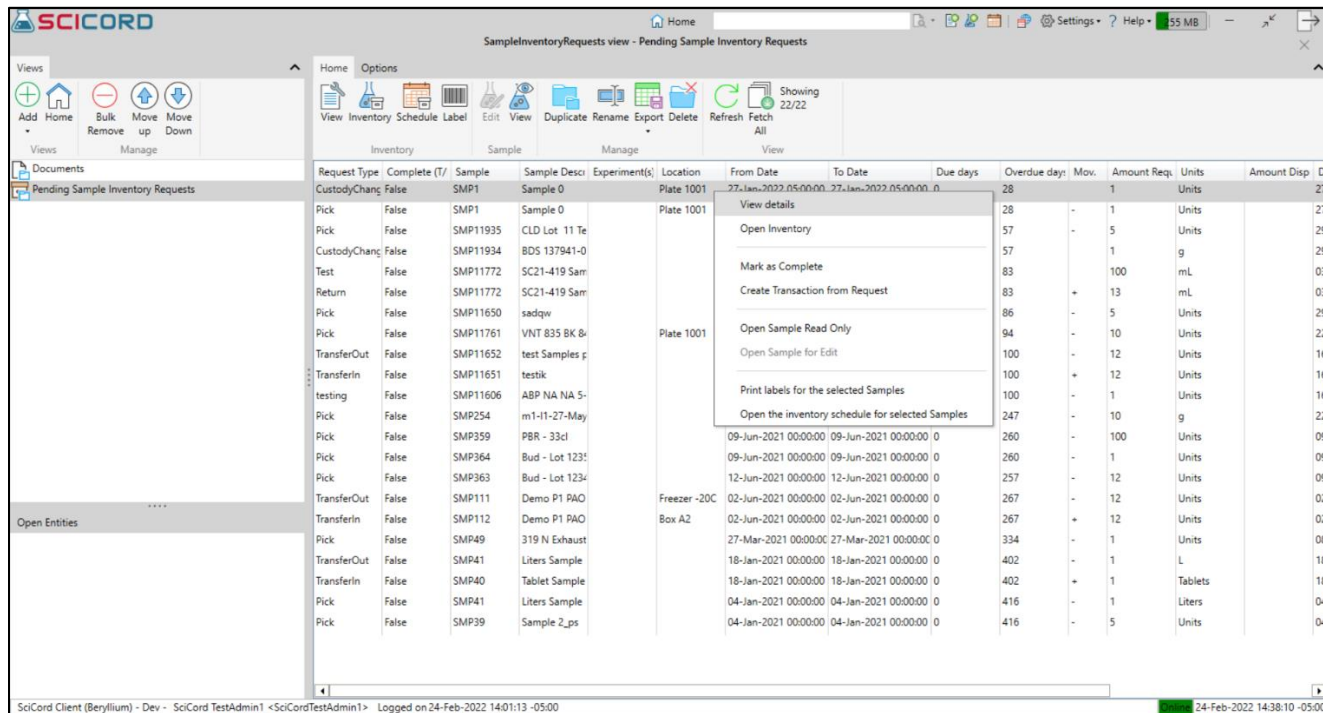


Filter's view

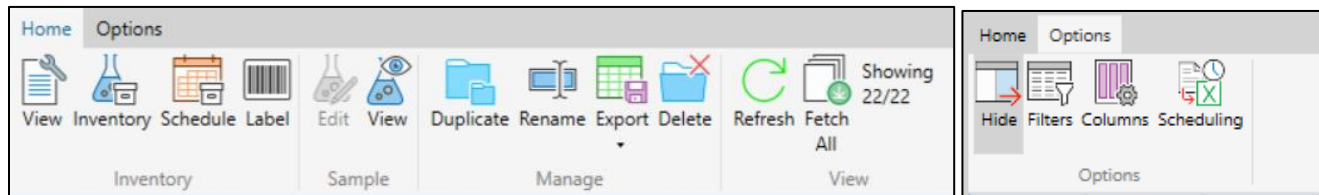
Column's view

Sample Inventory Requests View

The Sample Inventory Requests view implements a specific filtered and customizable view for Sample Inventory Requests that are in the SciCord System. The Sample Inventory Requests that appear in the Sample Inventory Requests View are initially filtered by Status.

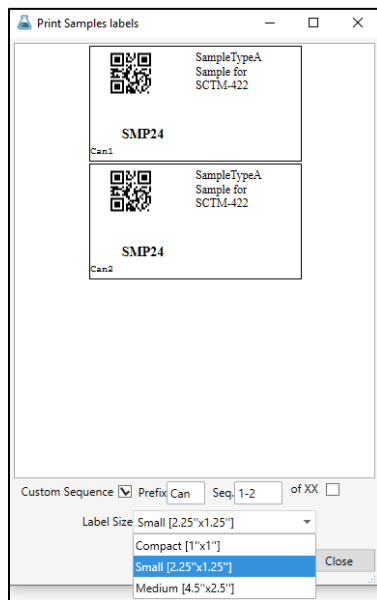


Samples Inventory Request view shown with contextual menu options



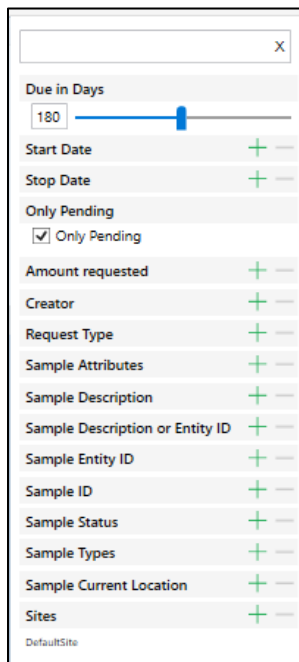
The **Home** tab options are:

- **Inventory section –**
 - **View** – opens a dialog to show the request details
 - **Inventory** – opens the sample inventory requests page
 - **Schedule** – opens calendar view of the sample inventory requests
 - **Label** – opens the print labels dialog, options to select **Label Size**, create **Custom Sequence**, **Print** or **Close**
 - **Sample section – Edit or View** the sample inventory request

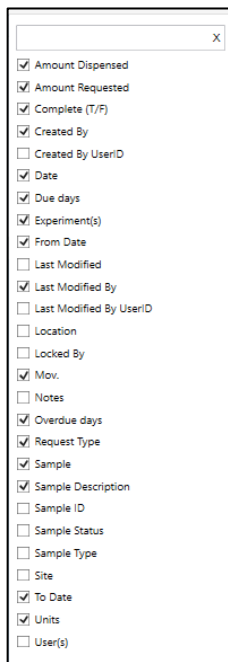


All other sections in the **Home and **Options** tab are consistent with all views.*

Below are the default Filters and Columns associated with the Sample Inventory Request View:



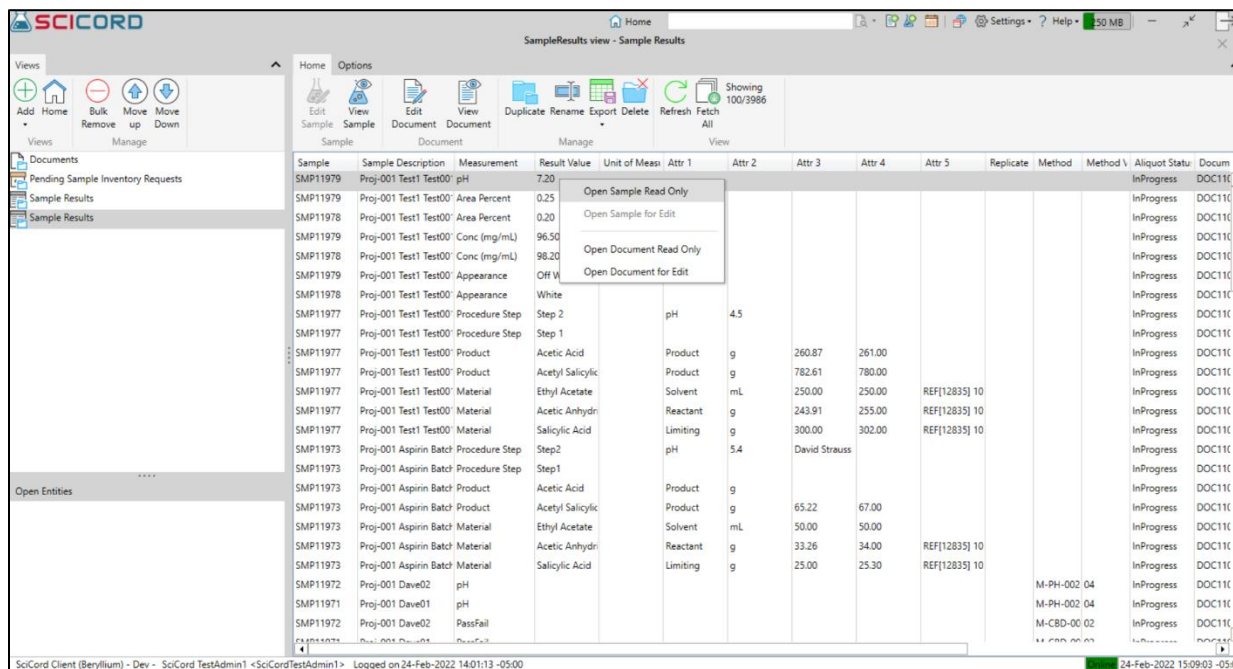
Filter's view



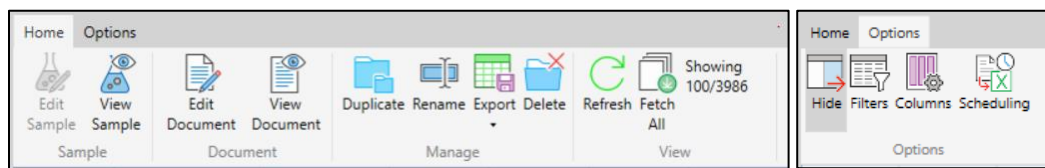
Column's view

Samples Results View

The Sample Results View implements a specific filtered and customizable view for Sample Results View that are in the SciCord System. The Samples Results View that appear in the Samples Results View are initially filtered by the user's site and Only Pending.



Sample Results view shown with contextual menu options

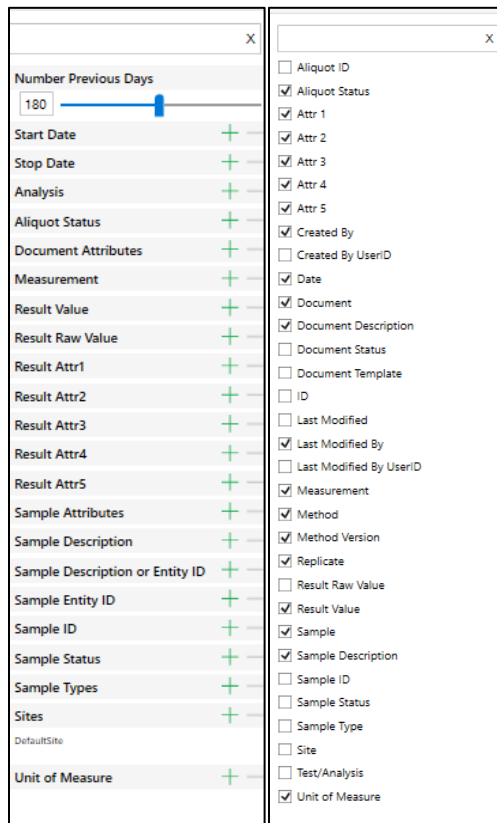


The **Home** toolbar options are:

- **Inventory section:**
 - **Edit Sample** – if sample is not in 'Available' status, user can edit the sample
 - **View Sample** – opens the sample in read only mode
- **Document section:**
 - **Edit Document** – if document is not in 'Complete' or 'Cancelled' status, user will be able to edit the document
 - **View Document** – opens the document in read only mode

All other sections in the **Home and **Options** tab are consistent with all views.*

Below are the default Filters and Columns associated with the Sample Results View:



Filter's view

Column's view

Specifications

Functions

A user is able manage sample specifications if they have the Sample_Edit permission. There are sliding panes available to expand your views of the specification.

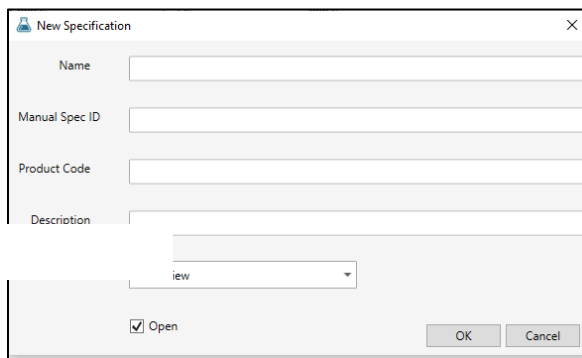
The user can create a specification, add samples to the specification, create rules, create versions, view sample results, show the history of the specification, and all signatures associated. An export of all the data to an Excel spreadsheet is also available.

The **Home** toolbar functions are shown below:

Specification:

- **New** – Dialog for new specification includes, Name, Manual Spec ID, Product Code, Description, Review Classification drop list with selections for SelfReview, PeerReview, PeerReviewApprove. An Open checkbox to have the Specification open for edit.

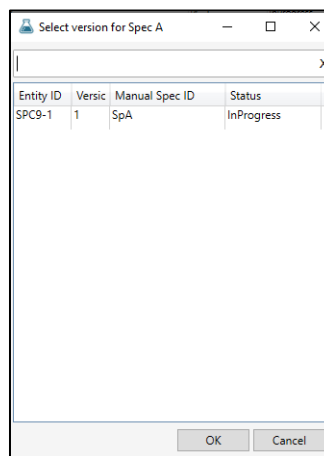
New Specification dialog



The 'New Specification' dialog box contains the following fields and controls:

- Name: Text input field
- Manual Spec ID: Text input field
- Product Code: Text input field
- Description: Text input field
- Review Classification: Drop-down menu with 'iew' selected
- Open: Checked checkbox
- OK and Cancel: Buttons at the bottom right

- **Clone** – opens a dialog to select a sample to clone



The 'Select version for Spec A' dialog box displays a table with the following data:

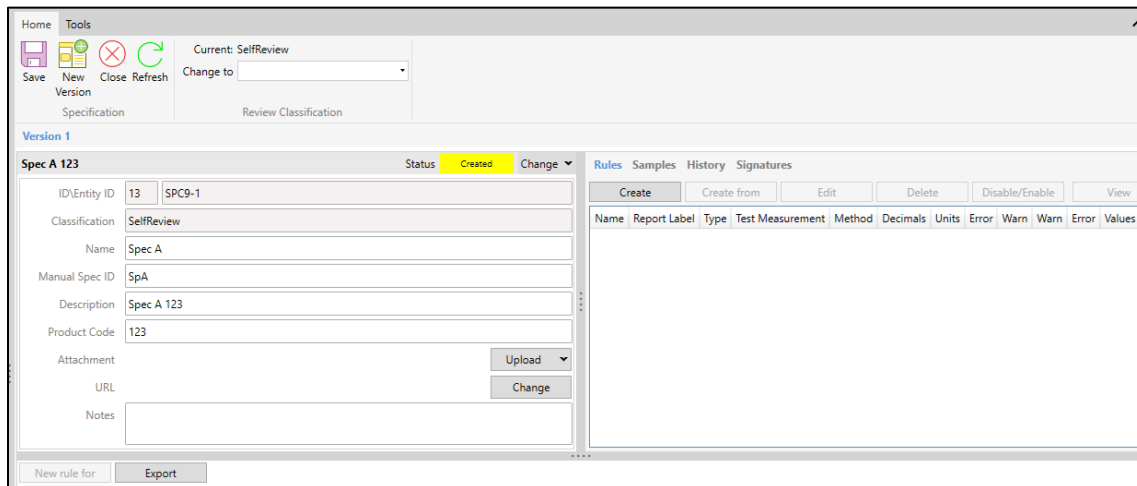
Entity ID	Versic	Manual Spec ID	Status
SPC9-1	1	SpA	InProgress

Buttons for OK and Cancel are located at the bottom right.

Clone sample dialog

- **Open** – open the specification for edit has fields for:
 - **Toolbar options for: Specification** section - **Save, New Version, Close, Refresh** and **Review Classification** section with drop list option to change the review classifications. A tab with the **Version** is located above the specification name.
 - Information on the left side of the Specification view pane:
 - **ID/Entity ID**
 - **Classification**

- **Name**
- **Manual Spec ID**
- **Description**
- **Product Code**
- **Attachment – Upload from local file or a Data File**
- **URL – option to Change the URL button**
- **Notes – free text field**

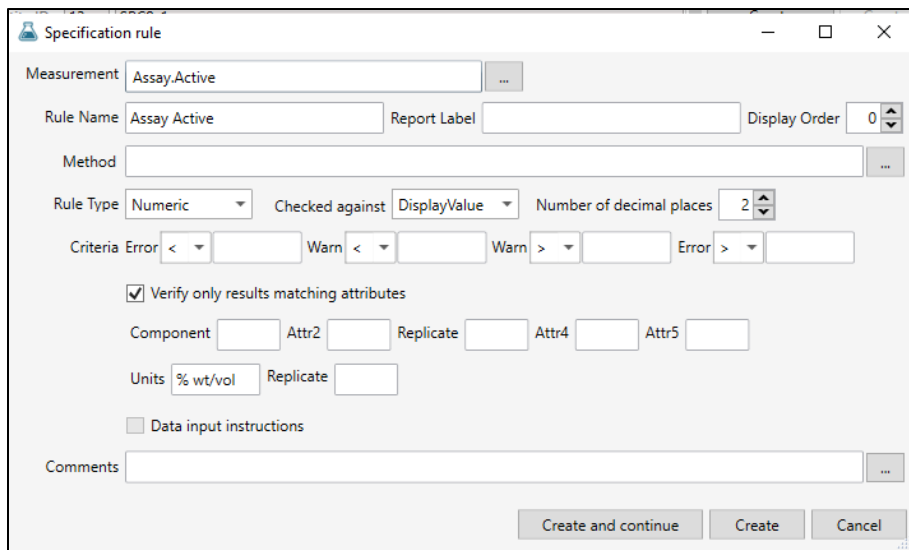


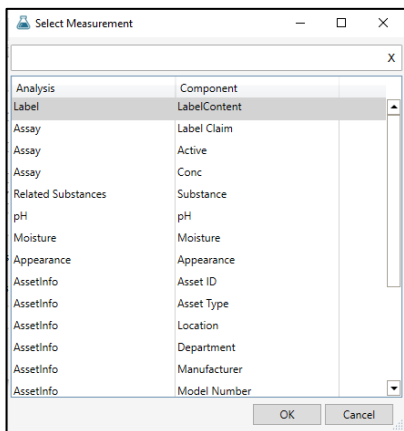
Shown here is a Created Specification for edit

- Information on the right side of the Specification view pane:
 - Tabs for **Rules, Samples, History, and Signatures**

Rules

Create a **Specification Rule** dialog:





- **Measurement** – selecting the “...” will open a Select Measurement dialog. These measurements are set up in the SciCord Portal Laboratory Configurations
 - **Rule Name** is automatically populated once the **Measurement** is selected.
 - **Report Label** – free text
 - **Display Order** – numeric values to assign order
 - **Method** - selecting the “...” will open a Select Resource dialog. The methods used are created from resource documents in the Client.
 - **Verify only results matching attributes** – checkbox to

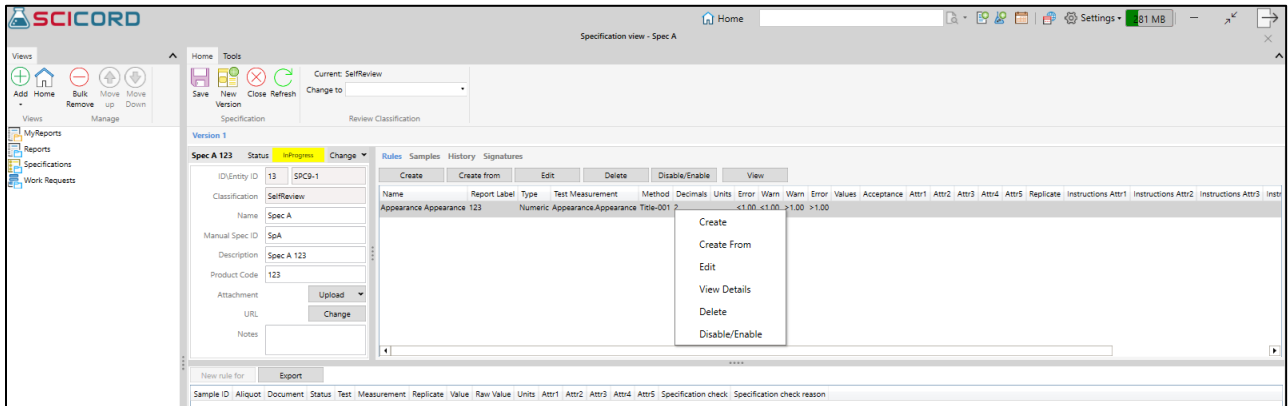
activate attributes set in the SciCord Portal Laboratory Configurations

- **Comments** - selecting the “...” will open a dialog to expand the comments box
- **Rule Type** – Numeric or Text

If **Numeric Rule Type** is selected:

- **Checked against** – drop list values set in the SciCord Portal Laboratory Configurations
- **Number of decimal places**
- **Criteria Error** – drop list selection of “≤” or “<” and a text box display to 2 decimal places
- **Criteria Warn** - drop list selection of “≤” or “<” and a text box display to 2 decimal places
- **Criteria Warn** - drop list selection of “≥” or “>” and a text box display to 2 decimal places
- **Criteria Error** - drop list selection of “≥” or “>” and a text box display to 2 decimal places
- If **Text Rule Type** is selected:
 - **Checked against** - drop list values set in the SciCord Portal Laboratory Configurations
 - **Criteria Expected values** – selecting the “...” will open a dialog to expand the text box
 - **Acceptance values** - selecting the “...” will open a dialog to expand the text box
- **Data input instructions** – checkbox to activate for Measurements with Instruction Label Attributes defined in the SciCord Portal Laboratory Configurations. Selecting the “...” will open a dialog to expand the text box

Buttons to **Create and Continue**, **Create**, and **Cancel**. Once the Specification is created



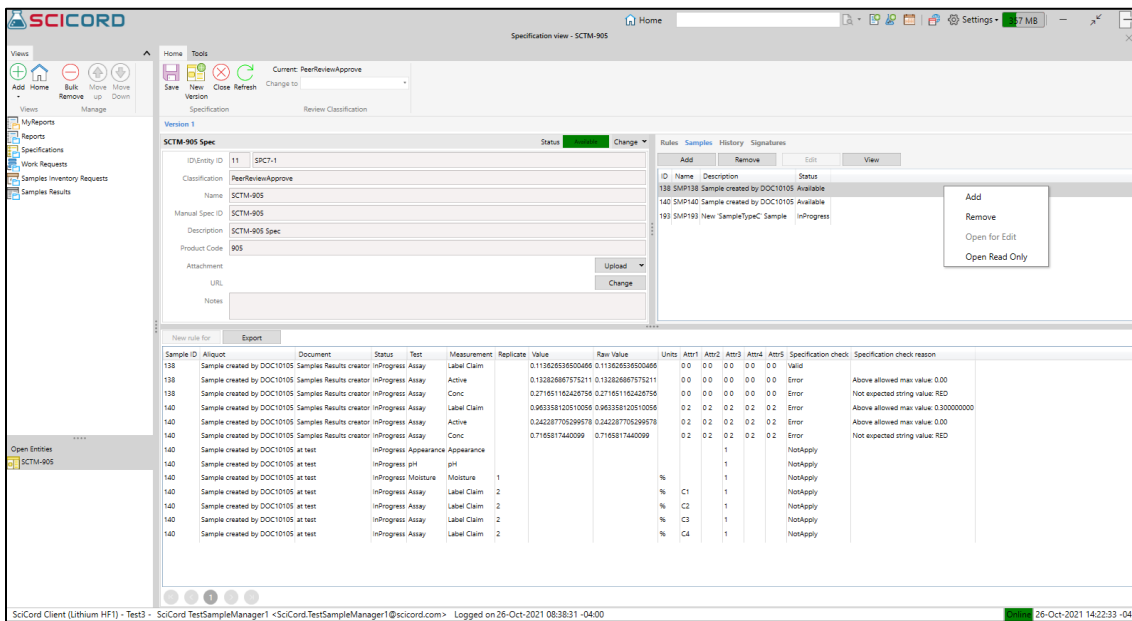
Specification Rule shown with contextual menu and all available columns and data.

Once a specification has been created the available buttons are:

- **Create**- create a rule dialog opens
- **Create from** – copies a rule from a selected rule and opens the dialog to create it
- **Edit**
- **Delete**
- **Disable/Enable** – toggles the flag to enable or disable a specification
- **View** – opens for view

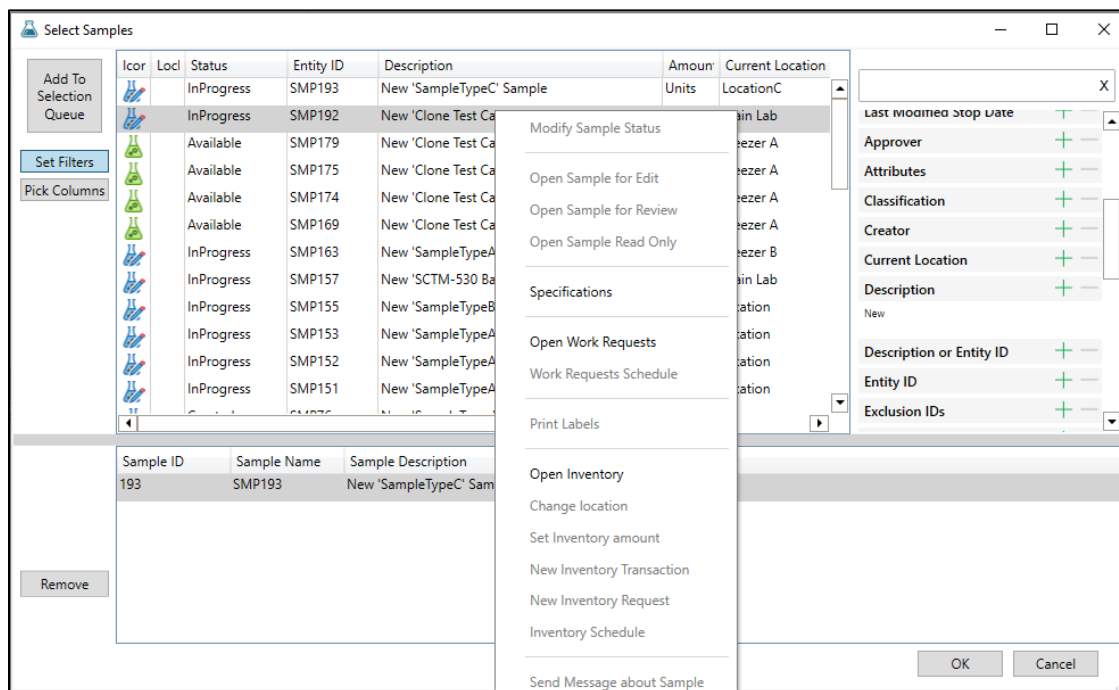
Samples

The Samples tab is available to **Add, Remove, Edit, and View** the samples for the specification. The user may use the toolbar options or the contextual menu options to complete these tasks.



To **Add** samples to a specification:

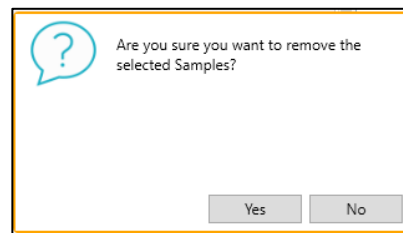
- ✓ Select **Add** button
- ✓ **Select Samples** dialog opens



- ✓ Select sample(s), using **Filters** if needed to **Add To Selection Queue**.
- ✓ Click OK, the Specification Samples tab is updated to show the sample selected

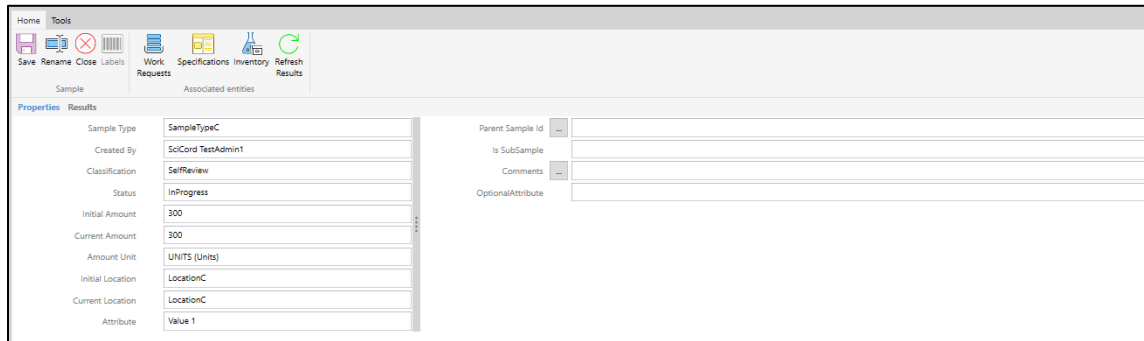
To **Remove** the sample from the **Specification**

- ✓ Select the Sample
- ✓ Click Remove
- ✓ A message appears asking if you are sure you want to remove the selected Samples, click **Yes** or **No**
- ✓ The sample has been removed

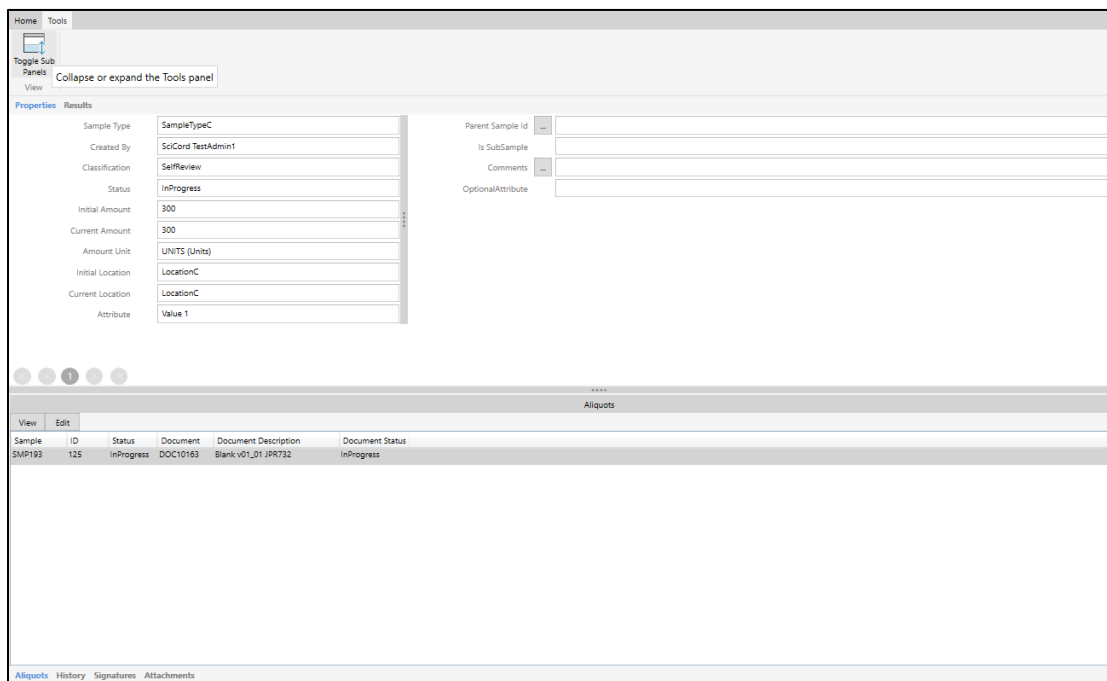


To **Edit** the sample associated to the **Specification**

- ✓ Select the Sample
- ✓ Click Edit
- ✓ Dialog opens showing the **Sample Properties**, toolbar options

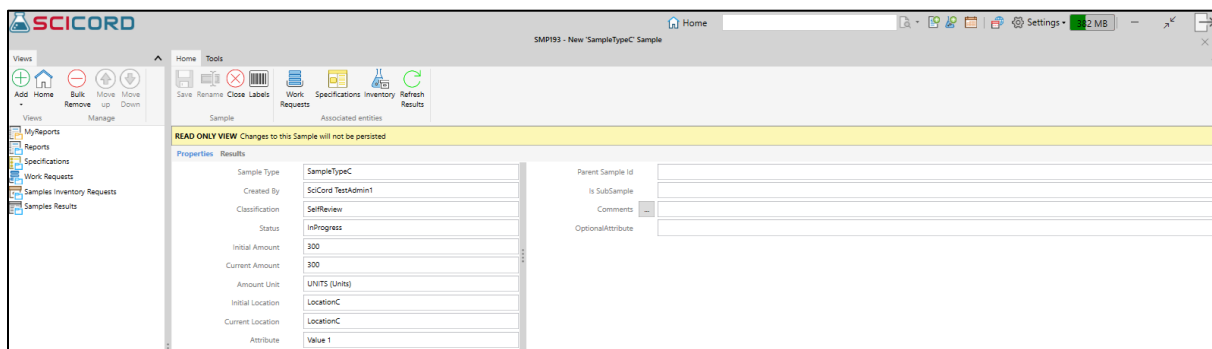


Sample Properties Home tab shown with toolbar options



Sample Properties Tools tab with subpanel toggle to reveal subpanel options – Aliquots, History, Signatures, Attachments

To use the **View** button, this action will reveal the **Sample Properties** shown with yellow ribbon to designate the user is viewing in **Read Only View**



History

The Specification History tab has checkboxes for **System**, **Specification**, and **Rules**. These checkboxes filter the Target Column data. Columns for Date, Author, Target, Event Type, Property, Value, Previous Value, AuditID

Date	Author	Target	Event Type	Property	Value	Previous Value	AuditID
26-Oct-2021 14:35:04 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1333
26-Oct-2021 14:15:03 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1332
13-Aug-2021 14:29:10 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Close				1272
13-Aug-2021 14:29:10 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1271
13-Aug-2021 13:51:08 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Close				1270
13-Aug-2021 13:51:08 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1269
12-Aug-2021 09:47:24 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Close				1149
12-Aug-2021 09:47:24 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1148
12-Aug-2021 09:46:19 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1147
12-Aug-2021 09:46:19 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	StatusChange	SpecificationStatus	Available	ApproveAssigned	1146
12-Aug-2021 09:46:36 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1145
12-Aug-2021 09:46:36 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	StatusChange	SpecificationStatus	ApproveAssigned	ReviewAssigned	1144
12-Aug-2021 09:45:03 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1143
12-Aug-2021 09:45:03 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	StatusChange	SpecificationStatus	ReviewAssigned	InProgress	1142
12-Aug-2021 09:41:04 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1141
12-Aug-2021 09:41:04 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	ModifiedEntry	ReviewClassification	PeerReviewApprove	SelfReview	1140
12-Aug-2021 09:40:08 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	ReviewClassificationChange	ReviewClassification	PeerReviewApprove	SelfReview	1139
12-Aug-2021 09:37:40 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1138
12-Aug-2021 09:37:40 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	StatusChange	SpecificationStatus	InProgress	Cancelled	1137
12-Aug-2021 09:35:55 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	Save				1136
12-Aug-2021 09:35:55 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	System	StatusChange	SpecificationStatus	Cancelled	InProgress	1135
11-Aug-2021 15:48:17 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	System	Close				1129
11-Aug-2021 15:48:17 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	System	Save				1128
11-Aug-2021 15:43:40 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	System	SpecificationRule Remove	Rule	AssayLabel Claim		1127
11-Aug-2021 15:43:33 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	System	SpecificationRule Remove	Rule	AssayLabel Claim		1126
11-Aug-2021 15:43:17 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	System	SpecificationRule InitiaEntry	Rule AssayConc / IonPriority	0		1125
11-Aug-2021 15:43:17 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	System	SpecificationRule InitiaEntry	Rule AssayConc / Instructors4815			1124
11-Aug-2021 15:43:17 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	System	SpecificationRule UpdateData	Rule AssayConc / Instructors4815			1123

Signatures

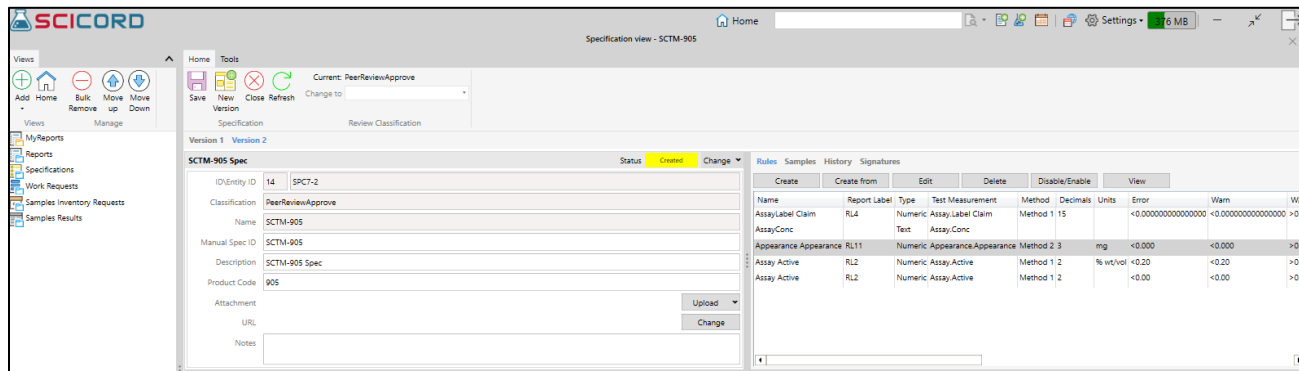
This Signatures tab will display all signatures associated with the Specification. There are columns to show **Signature Date**, **Created By**, **Signature Type**, and **Signature Meaning**.

Signature Date	Created By	Signature Type	Signature Meaning
12-Aug-2021 09:44:11 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	Reviewer	As reviewer
12-Aug-2021 09:45:56 -04:00	SciCord TestSampleManager1 <SciCord.TestSampleManager1@scicord.com>	Approver	As approver

Specification signatures show the time and date of the signature, the user id of the Reviewer and the Approver.

Create New Version

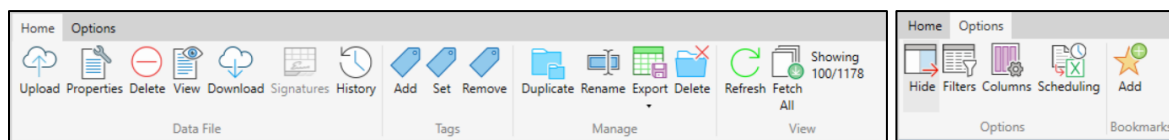
Using the New Version button in the toolbar will create a copy of the previous version. The user can then go in and manage any updates or changes needed.



Version 2 of the Specification is denoted in a blue tab located under the New Version button

Data Files

Dependent on User permissions, options may Upload, Delete, View, view Properties, Download, view History, create a public URL, View or Manage Signatures of Data Files.



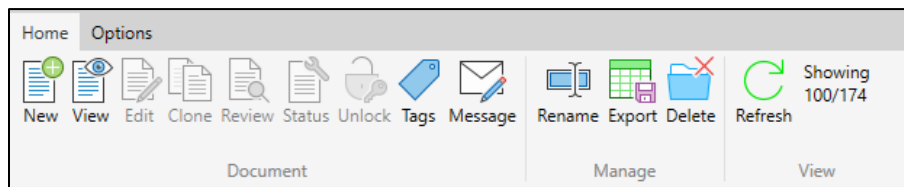
Document Editor

A User is able open any Document for Edit if they have the Document_Edit permission. After a Document has been edited and closed an electronic signature will be required.

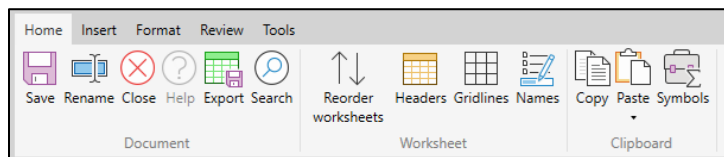
Functions

Document Editor Functions appear when the User opens a Document for Edit or Review, however only changes that are made to a Document in Edit mode will be saved. Many of these functions are like functions in Excel and Word. Below are images of the Document Editor Toolbar.

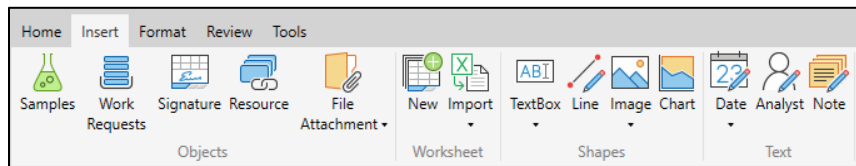
**See the SciCord Icons and Meanings section for a description of each of the icons.*



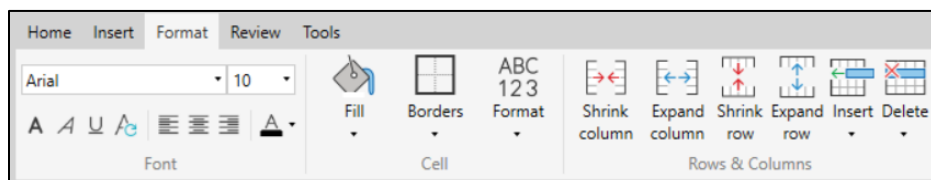
Documents View Home tab



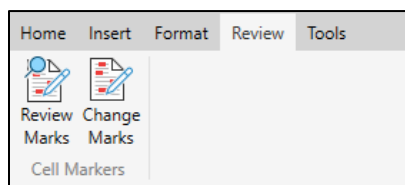
Document editor Home tab



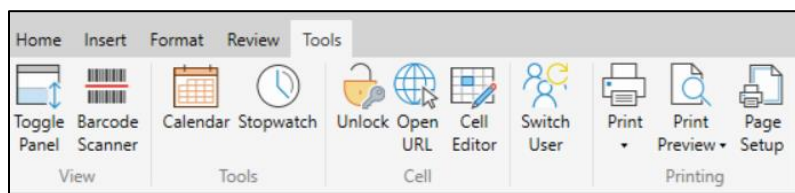
Document editor Insert tab



Document editor Format tab




Document editor Review tab



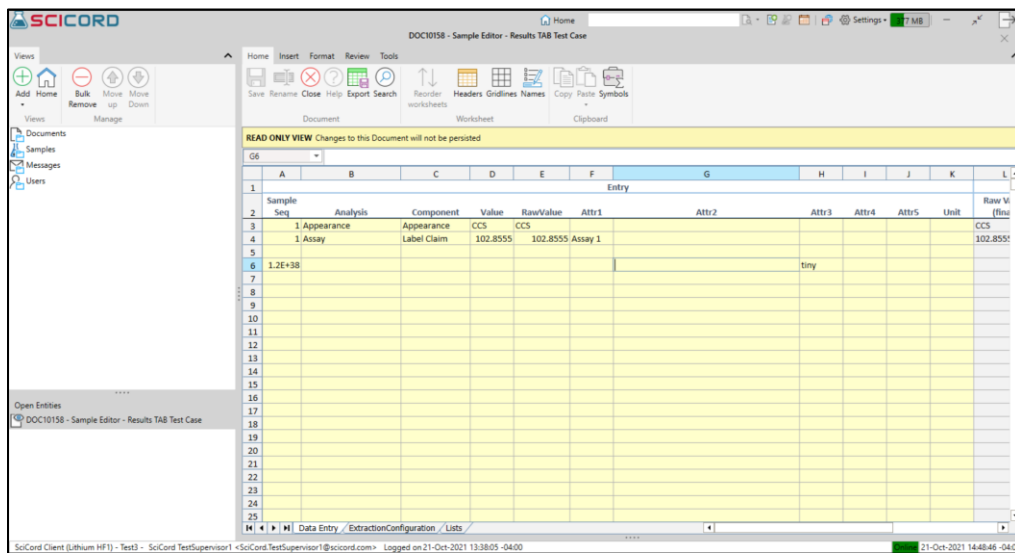
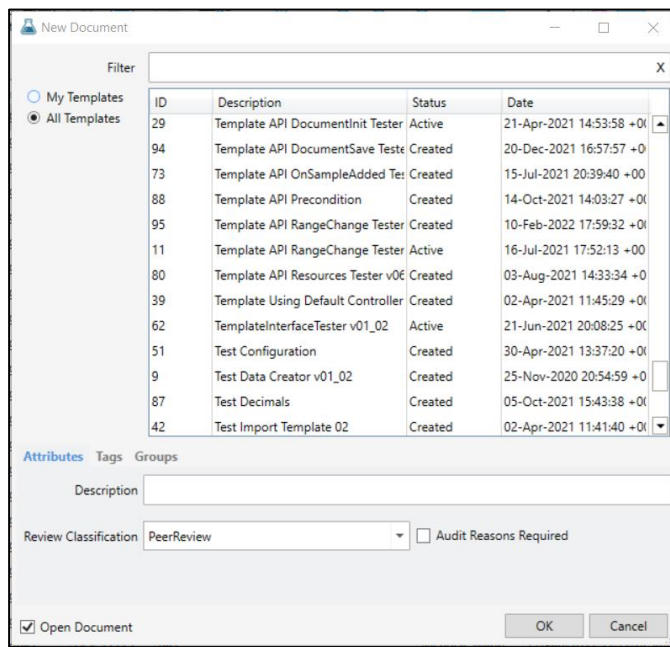
Document editor Tools tab

Create a Document

To create a Document:

- ✓ select the **New Document** icon () in the system toolbar or in a **(My)Documents** View
- ✓ A **New Document** dialogue will appear.
- ✓ The **New Document** dialogue provides buttons for a view of either 'All Templates' or 'My Templates'
- ✓ **Filter** bar can be dynamically filtered by recording text
- ✓ Select a template from the list
- ✓ **Attributes, Tags, Groups** can be added to the document. These add additional filters for the document being created.
- ✓ Record a **Description** for the selected Template
- ✓ Set the **Review Classification** (SelfReview, PeerReview, PeerReviewApprove).

- ✓ **Open Document** checkbox is checked by default. This will automatically open the user document
- ✓ After **'OK'** is selected the document will be opened if the 'Open Document' flag is selected.



Read Only Mode document

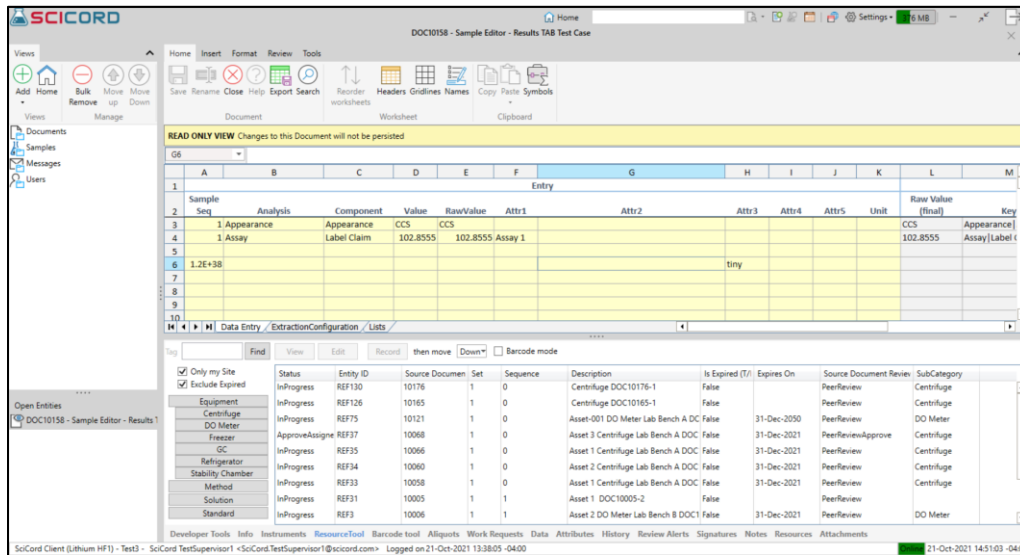
Note: When a Document is opened for Read-only the Document will open with a yellow ribbon (as seen on the image above). This denotes that the Document is in Read-only mode and no changes will be saved.

File Attachments

File attachments may be inserted, viewed, or downloaded. When a document is open for edit:

- ✓ Files may be inserted as an attachment using the Insert tab, File Attachment icon, from local file or a data file.
- ✓ Files can be drag and dropped into a document.
- ✓ Contextual Insert Attachment, Insert Data File

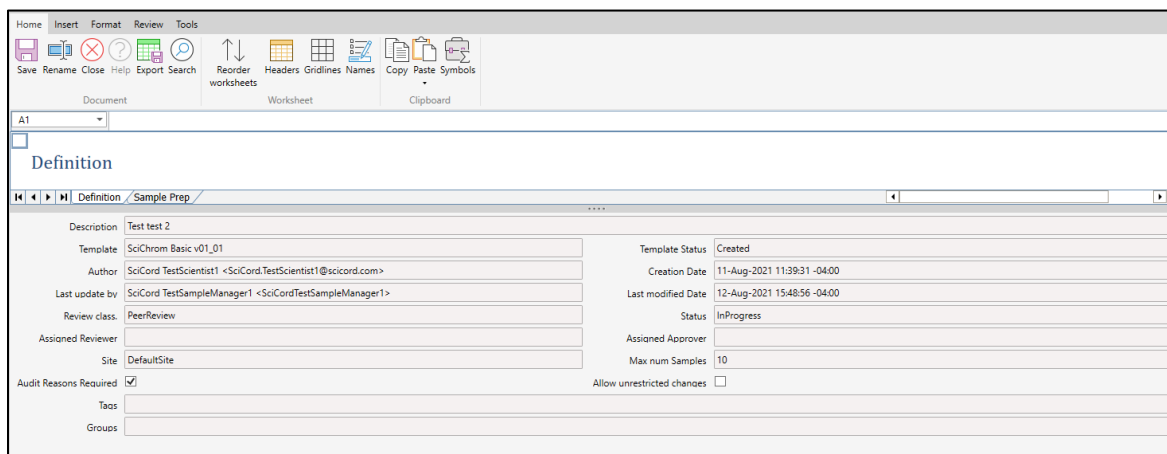
Documents View Subpanels



The screenshot displays the SciCord client interface. The main window shows a data table with columns for Sample, Seq, Analysis, Component, Value, RawValue, Attr1, Attr2, Attr3, Attr4, Attr5, Unit, Raw Value (final), and Key. Below the table, there is a subpanel list with columns for Status, Entity ID, Source Document, Set, Sequence, Description, Is Expired (T/F), Expires On, Source Document Review, and SubCategory. The subpanel list includes entries for various equipment and assets, such as Centrifuge, DO Meter, and Refrigerator.

Subpanels can be accessed by pulling up on the gray bar “.....” at the bottom of the client interface.

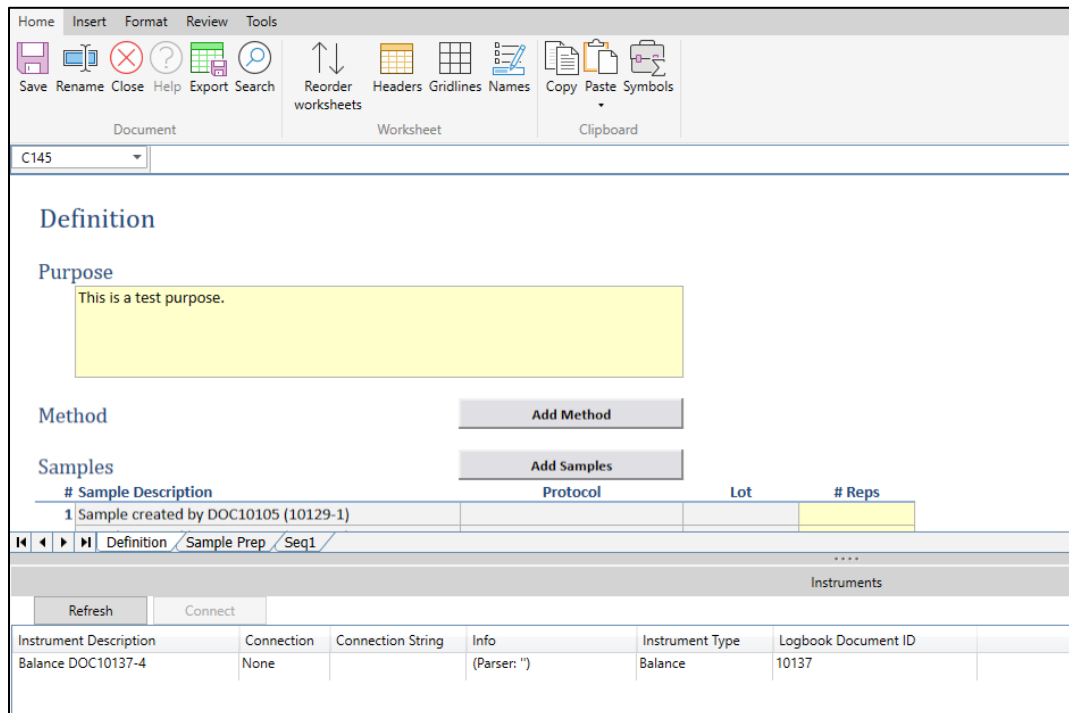
All Documents in the SciCord Client have Subpanels; however, each subpanel varies depending on the structure of the Template and whether there is any instrument interfacing. Some basic features include:



The screenshot shows a subpanel titled 'Definition' for a document. The subpanel contains the following information:

- Description: Test test 2
- Template: SciChrom Basic v01_01
- Author: SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>
- Last update by: SciCord TestSampleManager1 <SciCord.TestSampleManager1>
- Review class: PeerReview
- Assigned Reviewer:
- Site: DefaultSite
- Audit Reasons Required:
- Teas:
- Groups:
- Template Status: Created
- Creation Date: 11-Aug-2021 11:39:31 -04:00
- Last modified Date: 12-Aug-2021 15:48:56 -04:00
- Status: InProgress
- Assigned Approver:
- Max num Samples: 10
- Allow unrestricted changes:

Subpanel – Info tab



The screenshot displays the SciCord ELN/LIMS Client interface. At the top, there is a ribbon menu with tabs for Home, Insert, Format, Review, and Tools. Below the ribbon are various icons for document and worksheet management, including Save, Rename, Close, Help, Export, Search, Reorder worksheets, Headers, Gridlines, Names, Copy, Paste, and Symbols. The main area is divided into sections: Definition, Purpose (containing a text box with 'This is a test purpose.'), Method (with an 'Add Method' button), and Samples (with an 'Add Samples' button). Below these sections is a table with columns for #, Sample Description, Protocol, Lot, and # Reps. The table contains one row: '1 Sample created by DOC10105 (10129-1)'. Below the table are navigation buttons (Home, Back, Forward, Print) and a subpanel titled 'Instruments'. The 'Instruments' subpanel has 'Refresh' and 'Connect' buttons and a table with columns: Instrument Description, Connection, Connection String, Info, Instrument Type, and Logbook Document ID. The table contains one row: 'Balance DOC10137-4', 'None', '(Parser: ')', 'Balance', '10137'.

#	Sample Description	Protocol	Lot	# Reps
1	Sample created by DOC10105 (10129-1)			

Instrument Description	Connection	Connection String	Info	Instrument Type	Logbook Document ID
Balance DOC10137-4	None		(Parser: ")	Balance	10137

Subpanel – Instruments tab

Home Insert Format Review Tools

Save Rename Close Help Export Search Reorder worksheets Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

C145

Definition

Purpose
This is a test purpose.

Method Add Method

Samples Add Samples

#	Sample Description	Protocol	Lot	# Reps
1	Sample created by DOC10105 (10129-1)			

Definition / Sample Prep / Seq1

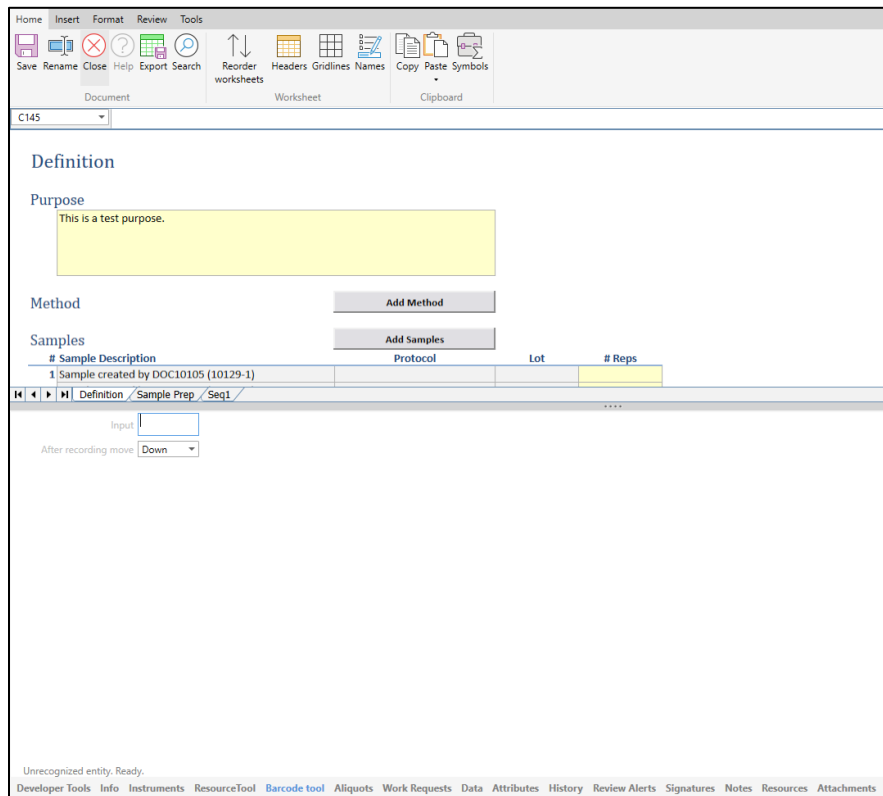
Tag Find View Edit Record then move Down Barcode mode

Only my Site
 Exclude Expired

Status	Entity ID	Source Document	Set	Sequence	Description	Is Expired (T/)	Expires On	Source Document Review	SubCategory
InProgress	REF131	10176	1	1	Refrigerator DOC10176-2	True	21-Sep-2021	PeerReview	Refrigerator
InProgress	REF130	10176	1	0	Centrifuge DOC10176-1	False		PeerReview	Centrifuge
InProgress	REF126	10165	1	0	Centrifuge DOC10165-1	False		PeerReview	Centrifuge
InProgress	REF75	10121	1	0	Asset-001 DO Meter Lab Bench A DC	False	31-Dec-2050	PeerReview	DO Meter
Complete	REF47	10090	1	0	Stability Chamber Lab Bench A DOC	True	10-Aug-2021	PeerReviewApprove	Stability Chamber
ApproveAssigne	REF37	10068	1	0	Asset 3 Centrifuge Lab Bench A DOC	False	31-Dec-2021	PeerReviewApprove	Centrifuge
InProgress	REF36	10067	1	0	Asset 2 Centrifuge Lab Bench A DOC	False	31-Dec-2021	PeerReview	Centrifuge
InProgress	REF35	10066	1	0	Asset 1 Centrifuge Lab Bench A DOC	False	31-Dec-2021	PeerReview	Centrifuge
InProgress	REF34	10060	1	0	Asset 2 Centrifuge Lab Bench A DOC	False	31-Dec-2021	PeerReview	Centrifuge
InProgress	REF33	10058	1	0	Asset 1 Centrifuge Lab Bench A DOC	False	31-Dec-2021	PeerReview	Centrifuge
InProgress	REF31	10005	1	1	Asset 1 DOC10005-2	False		PeerReview	
InProgress	REF9	10006	1	2	Freezer DOC10006-3	True	01-Aug-2021	PeerReview	Freezer
InProgress	REF10	10006	1	3	GC DOC10006-4	True	02-Aug-2021	PeerReview	GC
InProgress	REF3	10006	1	1	Asset 2 DO Meter Lab Bench B DOC1	False	31-Dec-2021	PeerReview	DO Meter
InProgress	REF2	10006	1	0	Asset 1 Centrifuge Lab Bench A DOC	False	30-Dec-2021	PeerReview	Centrifuge
InProgress	REF1	10005	1	0	Stab-001 Stability Chamber 5 DOC10	False	31-Dec-2050	PeerReview	Stability Chamber

Developer Tools Info Instruments ResourceTool Barcode tool Aliquots Work Requests Data Attributes History Review Alerts Signatures Notes Resources Attachments

Subpanel – Resource Tool



The screenshot displays the SciCord ELN/LIMS Client interface. At the top is a ribbon menu with tabs for Home, Insert, Format, Review, and Tools. Below the ribbon are three groups of icons: Document (Save, Rename, Close, Help, Export, Search), Worksheet (Reorder worksheets, Headers, Gridlines, Names), and Clipboard (Copy, Paste, Symbols). A dropdown menu shows 'C145'. The main content area is titled 'Definition' and contains a 'Purpose' section with a yellow text box containing 'This is a test purpose.'. Below this are 'Method' and 'Samples' sections, each with an 'Add Method' and 'Add Samples' button respectively. A table is visible with columns for '# Sample Description', 'Protocol', 'Lot', and '# Reps'. The first row contains '1 Sample created by DOC10105 (10129-1)'. At the bottom, there is an 'Input' field and a dropdown menu labeled 'After recording move' with 'Down' selected. A status bar at the very bottom reads 'Unrecognized entity. Ready.' and contains a list of menu items: Developer Tools, Info, Instruments, ResourceTool, Barcode tool, Aliquots, Work Requests, Data, Attributes, History, Review Alerts, Signatures, Notes, Resources, Attachments.

Subpanel – Barcode Tool

Home | Insert | Format | Review | Tools

Save Rename Close Help Export Search Reorder worksheets Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

C145

Definition

Purpose
This is a test purpose.

Method

Samples

#	Sample Description	Protocol	Lot	# Reqs
1	Sample created by DOC10105 (10129-1)			
2	Sample created by DOC10105 (10129-2)			

Resources

Description	Expiry/Calibration Due Date
REF[104] Balance DOC10137-4	

Chromatography

Testing Method	Worksheet Name	Empower Path
1	Seq1	

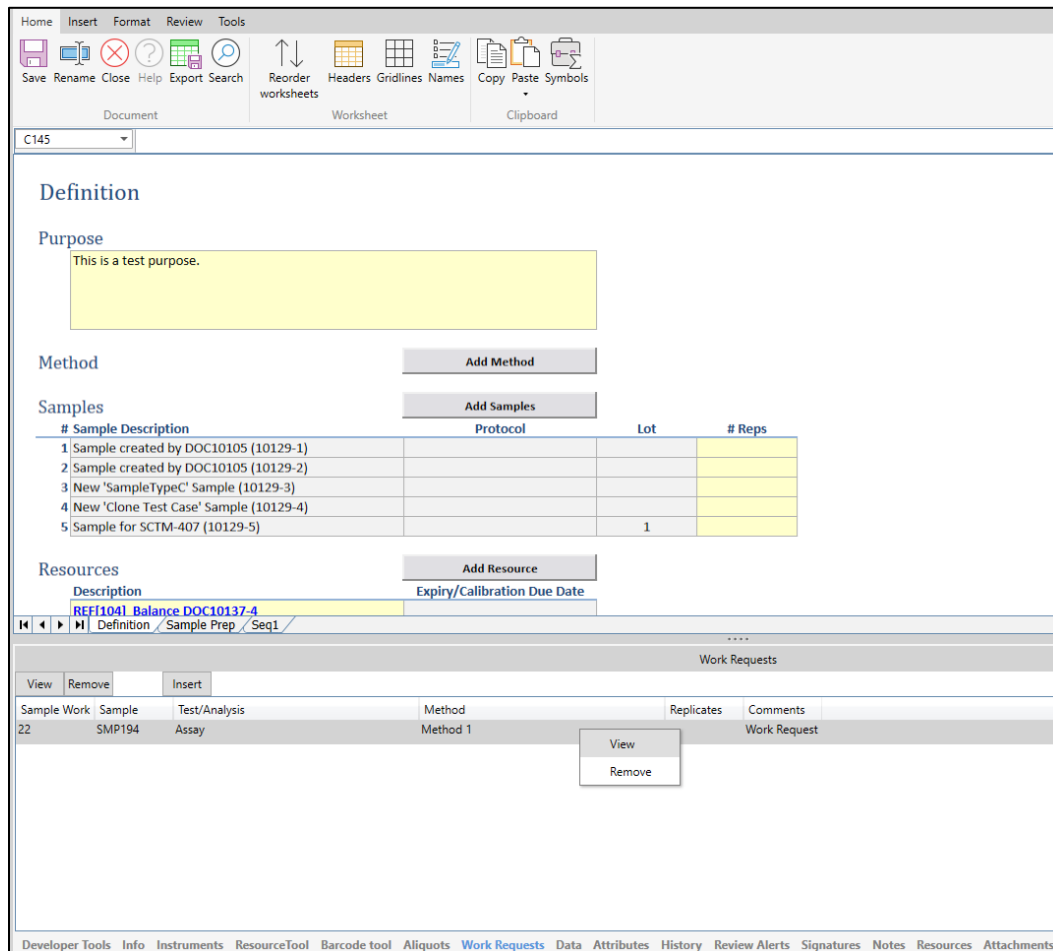
Definition / Sample Prep / Seq1

Aliquots

View	Edit	Work Requests	Inventory	Label	Insert	
Set	Sequence	Aliquot ID	Sample ID	Description	Status	Classification
0	0	95	142	Sample created by DOC10105	InProgress	SelfReview
0	1	96	141	Sample created by DOC10105	InProgress	SelfReview

Developer Tools | Info | Instruments | ResourceTool | Barcode tool | Aliquots | Work Requests | Data | Attributes | History | Review Alerts | Signatures | Notes | Resources | Attachments

Subpanel – Aliquot’s tab



Definition

Purpose
This is a test purpose.

Method Add Method

Samples Add Samples

#	Sample Description	Protocol	Lot	# Reps
1	Sample created by DOC10105 (10129-1)			
2	Sample created by DOC10105 (10129-2)			
3	New 'SampleTypeC' Sample (10129-3)			
4	New 'Clone Test Case' Sample (10129-4)			
5	Sample for SCTM-407 (10129-5)		1	

Resources Add Resource

Description	Expiry/Calibration Due Date
REF1041 Balance DOC10137-4	

Definition / Sample Prep / Seq1

Work Requests

View	Remove	Insert	Sample Work	Sample	Test/Analysis	Method	Replicates	Comments
			22	SMP194	Assay	Method 1		Work Request

View Remove

Developer Tools Info Instruments ResourceTool Barcode tool Aliquots Work Requests Data Attributes History Review Alerts Signatures Notes Resources Attachments

Subpanel – Work Request tab

Home Insert Format Review Tools

Save Rename Close Help Export Search Reorder Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

READ ONLY VIEW Changes to this Document will not be persisted

CellResourceMet1

Purpose

ATT[135] Structured Data Verification

Samples [Add Sample](#)

Ex-Actuator

Seq	Sample ID	Description	Project	Lot	Interval	Cans	First Target % w/w	Comp2 Target % w/w	Comp3 Target % w/w	Last Target % w/w
1	10	Demo 010Project 010Batch	010Project	010Lot	BOL	2	61	62	63	64
2	9	Demo 009Project 009Batch	009Project	009Lot	BOL	4	71	72	73	74
3	8	Demo 008Project 008Batch	008Project	008Lot	MOL	6	81	82	83	84
4	7	Demo 007Project 007Batch	007Project	007Lot	EOL	8	91	92	93	94
5	6	Demo 006Project 006Batch	006Project	006Lot	EOL	10	96	97	98	99

Documents Attachment or Reference Version

Samples / Configure / Canisters / Resources / Firedown / Extract / Dilute / Procedure / Sequences / Suitability / Spl1 / Spl2 / Spl3 / Spl4 / Spl5

Data

Export

Set	Seq	Aliquot	Test	Measurement	Value	RawValue	Units	Attr1	Attr2	Attr3	Attr4	Attr5	Replicate	Method	Method Ver.	Export
0	0	Demo 010Project 010Batch	APSD	Actuation Weight	3500.0	3500	mg/act			BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Canister Name	S1C2	S1C2				BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Comment	Comment 2	Comment 2				BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition	9.5	9.5238095238095	%		Stage 2	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition	8.7	8.7301587301587	%		Stage 1	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition	7.9	7.9365079365079	%		Induction Port	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition			%	First	Pre Sep	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition			%	First	Capsule	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition			%	First	Inhaler	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition	11.3	11.287477954144	%	First	Stage 6	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition			%	First	Pre Sep	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition	10.8	10.758377425044	%	First	Induction Port	BOL			2			<input checked="" type="checkbox"/>
0	0	Demo 010Project 010Batch	APSD	Deposition	10.8	10.846560846560	%	First	Stage 1	BOL			2			<input checked="" type="checkbox"/>

Developer Tools Info Instruments ResourceTool Barcode tool Aliquots Work Requests Data Attributes History Review Alerts Signatures Notes Resources Attachments

Subpanel – Data tab

Home Insert Format Review Tools

Save Rename Close Help Export Search Reorder worksheets Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

A1

Preconditions

A Specification having following rules must exist or can be created (Criteria are just a suggestion)

Measurement	Rule Type
pH.pH	Numeric Rule, Checked against Display Value, Number of decimal places: 3
Appearance.Appearance	Text Rule, Checked against Display Value

Instructions

Step	Expected Result
1 On Definition sheet, record a description for each available resource and record a status of "active" for each.	The resources and resource status are recorded.
2 Save the document and verify the resources are created.	An aliquot is created for each resource in aliquot set 2 and aliquot set 3. The recorded description forms the aliquot name. ID column is set. The status of each aliquot is "InProgress".
3 * 2 Samples linked to a Specification as of Preconditions	4 rows are displayed in the Definition worksheet Sample Table. The 4 selected samples are displayed in the Definitions worksheet sample table.

Instructions / Definition / Results / Skip / AutomationConfiguration / ExtractionConfigurationV2

Attributes

Export

Name	Value	Attr1	Attr2	Attr3	Attr4	Attr5
COLUMN_USAGE	10.23	2	Seq1	LastBracketPlates		
COLUMN_USAGE	30.41	2	Seq-R1	LastBracketPlates		
COLUMN_USAGE	1.3	2	Seq1	LastBracketTailing		
COLUMN_USAGE	1.5	2	Seq-R1	LastBracketTailing		
COLUMN_USAGE	12	2	Seq1	NumInjs		
COLUMN_USAGE	13	2	Seq-R1	NumInjs		
COLUMN_USAGE	20170605	2	Seq1	ExtractionDate		
COLUMN_USAGE	20170705	2	Seq-R1	ExtractionDate		

Developer Tools Info Instruments ResourceTool Barcode tool Aliquots Work Requests Data Attributes History Review Alerts Signatures Notes Resources Attachments

Subpanel – Attributes tab

Home Insert Format Review Tools

Save Rename Close Help Export Search Reorder worksheets Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

READ ONLY VIEW Changes to this Document will not be persisted

CellResourceMett

Purpose

ATT[135] Structured Data Verification

Samples

Ex-Actuator

Seq	Sample ID	Description	Project	Lot	Interval	#	First Target % w/w	Comp2 Target % w/w	Comp3 Target % w/w	Last Target % w/w
1	10	Demo 010Project 010Batch	010Project	010Lot	BOL	2	61	62	63	64
2	9	Demo 009Project 009Batch	009Project	009Lot	BOL	4	71	72	73	74
3	8	Demo 008Project 008Batch	008Project	009Lot	MOL	6	81	82	83	84
4	7	Demo 007Project 007Batch	007Project	007Lot	EOL	8	91	92	93	94
5	6	Demo 006Project 006Batch	006Project	006Lot	EOL	10	96	97	98	99

Documents Attachment or Reference Version

Samples / Configure / Canisters / Resources / Firedown / Extract / Dilute / Procedure / Sequences / Suitability / Spl1 / Spl2 / Spl3 / Spl4 / Spl5

History

GoTo Revert Cell Value Selected Cells Worksheet All Cells Shapes Attachments System AddToReason View Session 1 Export

Sig?	Date	Author	Event Type	Display Value	Raw Value	Reason	Address	Source	Reviewed By	Review Date	Worksheet	AuditID
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:43 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	7.0000	7	InitialEntry	Spl1ISDI\$45	Default			Spl1	29390
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:43 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	3.0000	3	InitialEntry	Spl1ISDI\$44	Default			Spl1	29389
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:42 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	1.0000	1	InitialEntry	Spl1ISDI\$43	Default			Spl1	29388
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:42 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	9.0000	9	InitialEntry	Spl1ISDI\$42	Default			Spl1	29387
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:41 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	5.0000	5	InitialEntry	Spl1ISDI\$41	Default			Spl1	29386
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:41 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	6.0000	6	InitialEntry	Spl1ISDI\$40	Default			Spl1	29385
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:41 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	2.0000	2	InitialEntry	Spl1ISDI\$39	Default			Spl1	29384
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:40 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	4.0000	4	InitialEntry	Spl1ISDI\$38	Default			Spl1	29383
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:40 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	8.0000	8	InitialEntry	Spl1ISDI\$37	Default			Spl1	29382
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:38 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	6.0000	6	InitialEntry	Spl1ISDH\$45	Default			Spl1	29381
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:37 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	1.0000	1	InitialEntry	Spl1ISDH\$44	Default			Spl1	29380
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:36 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	9.0000	9	InitialEntry	Spl1ISDH\$43	Default			Spl1	29379
<input checked="" type="checkbox"/>	28-Sep-2021 16:57:35 -04:00	Robert Lumley <robert.lumley@scicord.com>	InitialCellEntry	7.0000	7	InitialEntry	Spl1ISDH\$42	Default			Spl1	29378

Developer Tools Info Instruments ResourceTool Barcode tool Aliquots Work Requests Data Attributes History Review Alerts Signatures Notes Resources Attachments

Subpanel – History tab

Home Insert Format Review Tools

Save Rename Close Help Export Search Reorder worksheets Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

READ ONLY VIEW Changes to this Document will not be persisted

CellResourceMet1

Purpose

Samples [Add Sample](#)

ATT[135] Structured Data Verification

Ex-Actuator

Seq	Sample ID	Description	Project	Lot	Interval	# Cans	First Target % w/w	Comp2 Target % w/w	Comp3 Target % w/w	Last Target % w/w
1	10	Demo 010Project 010Batch	010Project	010Lot	BOL	2	61	62	63	64
2	9	Demo 009Project 009Batch	009Project	009Lot	BOL	4	71	72	73	74
3	8	Demo 008Project 008Batch	008Project	009Lot	MOL	6	81	82	83	84
4	7	Demo 007Project 007Batch	007Project	007Lot	EOL	8	91	92	93	94

Samples / Configure / Canisters / Resources / Firedown / Extract / Dilute / Procedure / Sequences / Suitability / Spl1 / Spl2 / Spl3 / Spl4 / Spl5

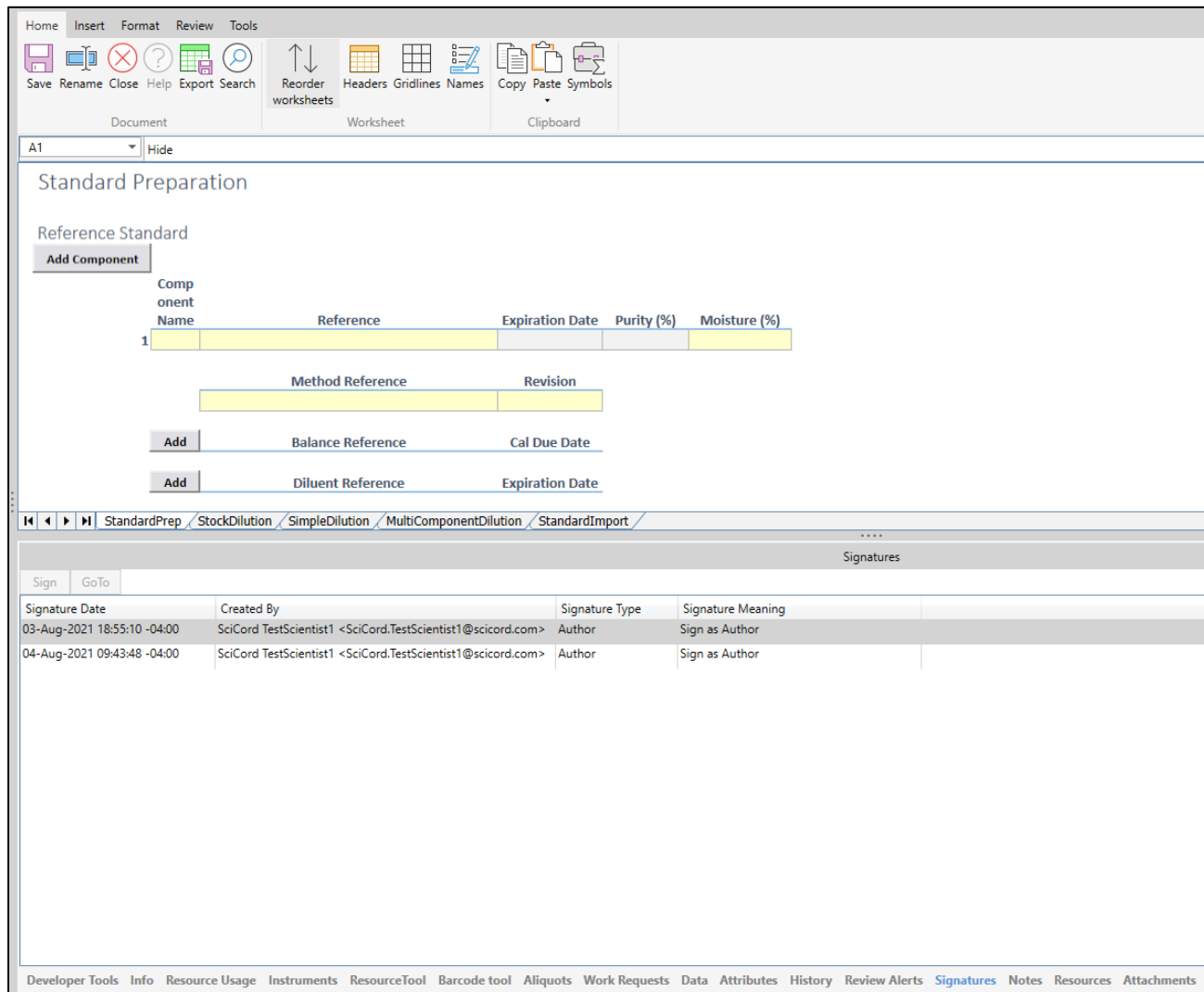
Review Alerts

GoTo Export

Alert	Address	Display Value	Raw Value	Reviewed By	Review Date
Document Template not validated at the time of creation	1				
Document Template not validated at the time of creation		Document creat			
Unlocked cell	5				
Unlocked cell	Canisters:\$K\$8	yes	yes		
Unlocked cell	Canisters:\$K\$9	yes	yes		
Unlocked cell	Canisters:\$K\$70	yes	yes		
Unlocked cell	Canisters:\$K\$10	yes	yes		
Unlocked cell	Canisters:\$K\$13	yes	yes		
Unknown resource expiration or calibration due date at the time of recording	32				
Unknown resource expiration or calibration due date at the time of recording	Resources:\$F\$1: REF[125] STD10	REF[125] STD10			
Unknown resource expiration or calibration due date at the time of recording	Resources:\$F\$1: REF[126] STD10	REF[126] STD10			

Developer Tools Info Instruments ResourceTool Barcode tool Aliquots Work Requests Data Attributes History [Review Alerts](#) Signatures Notes Resources Attachments

Subpanel – Review Alerts tab



The screenshot displays the 'Standard Preparation' subpanel. At the top, there is a ribbon with tabs for Home, Insert, Format, Review, and Tools. Below the ribbon are icons for various actions like Save, Rename, Close, Help, Export, Search, Reorder worksheets, Headers, Gridlines, Names, Copy, Paste, and Symbols. The main area is titled 'Standard Preparation' and contains a 'Reference Standard' section with an 'Add Component' button. Below this is a table with columns for Component Name, Reference, Expiration Date, Purity (%), and Moisture (%). There are also buttons for adding Method Reference, Balance Reference, and Diluent Reference. At the bottom, there is a 'Signatures' tab with a table showing signature details.

Component Name	Reference	Expiration Date	Purity (%)	Moisture (%)
1				

Signature Date	Created By	Signature Type	Signature Meaning
03-Aug-2021 18:55:10 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	Author	Sign as Author
04-Aug-2021 09:43:48 -04:00	SciCord TestScientist1 <SciCord.TestScientist1@scicord.com>	Author	Sign as Author

Subpanel – Signatures tab

Home Insert Format Review Tools

Save Rename Close Help Export Search Reorder worksheets Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

I40

Standard Preparation

Reference Standard

Add Component

Component Name	Reference	Expiration Date	Purity (%)	Moisture (%)
1				

Method Reference Revision

Add Balance Reference Cal Due Date

Add Diluent Reference Expiration Date

StandardPrep / StockDilution / SimpleDilution / MultiComponentDilution / StandardImport

Notes

New Append Remove GoTo Export

Created By	Date	Note Text	Note Location
SciCord TestSampleM	27-Oct-2021 14:57:51	Test Comments and Notes	StandardPrep!G\$6

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Subpanel – Notes tab

Home Insert Format Review Tools

Save Rename Close Help Export Search Reorder worksheets Headers Gridlines Names Copy Paste Symbols

Document Worksheet Clipboard

140

Standard Preparation

Reference Standard

Add Component

Component Name	Reference	Expiration Date	Purity (%)	Moisture (%)
1				

Method Reference Revision

Add Balance Reference Cal Due Date

Add Diluent Reference Expiration Date

StandardPrep / StockDilution / SimpleDilution / MultiComponentDilution / StandardImport

Resources

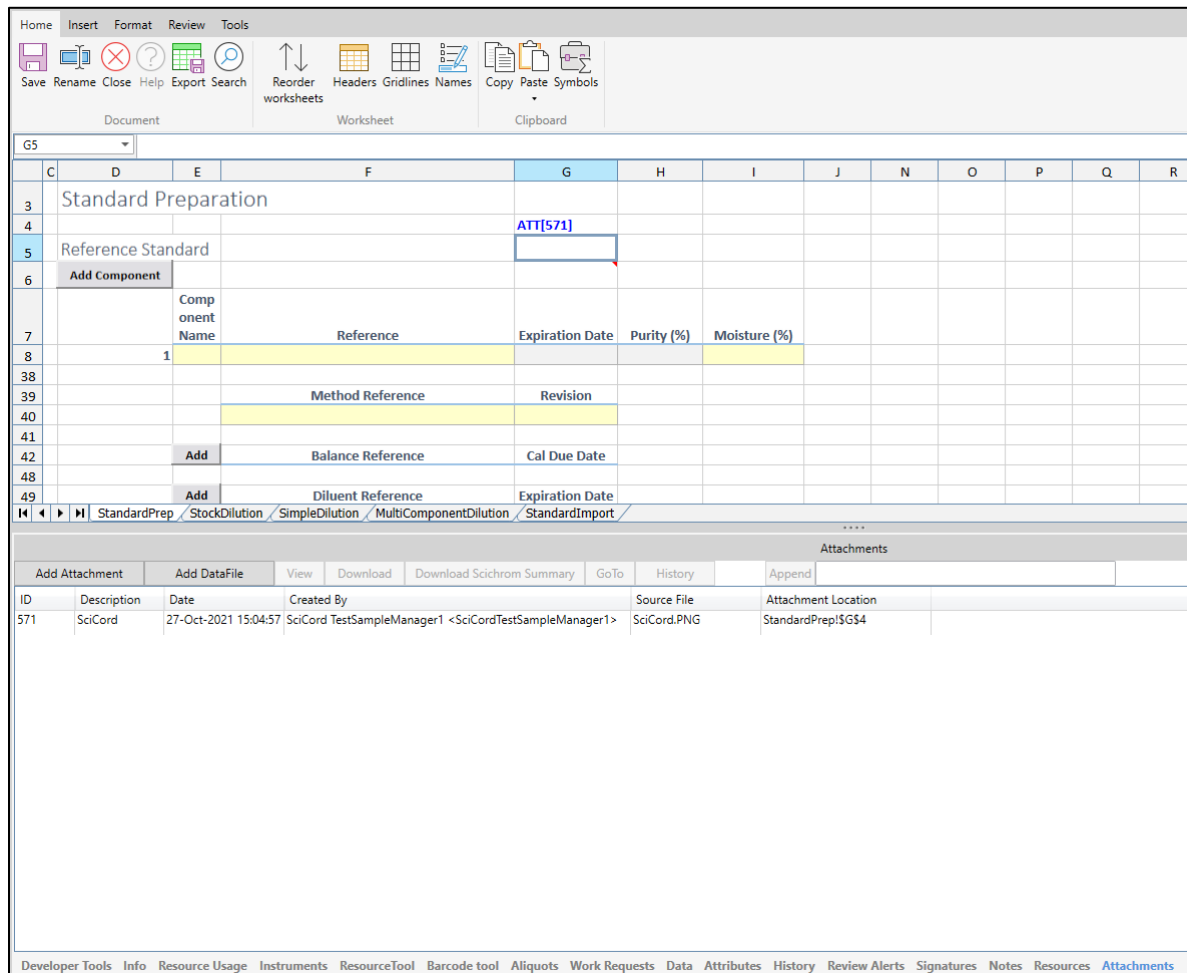
Inventory Relationships Chart

Refresh Edit View Inventory Set amount Use amount Return amount

Resource	Description	Amount in Inventory	Used by experiment	Unit
REF5	PREP10018-1 Des 1			
REF11	STD10023-1 Resource1 <08032021> ActiveCurrent	0		cl
REF12	STD10023-2 Resource2 <08032021> ActiveCurrent			
REF13	STD10023-3 Resource3 <08032021> ActiveExpired			

Developer Tools Info Resource Usage Instruments ResourceTool Barcode tool Aliquots Work Requests Data Attributes History Review Alerts Signatures Notes Resources Attachments

Subpanel – Resources tab



The screenshot displays the SciCord ELN/LIMS Client User Guide interface. The top section shows a ribbon with tabs: Home, Insert, Format, Review, and Tools. Below the ribbon are various icons for document and worksheet management, including Save, Rename, Close, Help, Export, Search, Reorder worksheets, Headers, Gridlines, Names, Copy, Paste, and Symbols.

The main area is a spreadsheet with columns labeled C through R and rows numbered 3 through 49. The spreadsheet contains the following data:

Component Name	Reference	Expiration Date	Purity (%)	Moisture (%)
1				
Method Reference		Revision		
Add	Balance Reference	Cal Due Date		
Add	Diluent Reference		Expiration Date	

Below the spreadsheet is an Attachments panel with the following data:

ID	Description	Date	Created By	Source File	Attachment Location
571	SciCord	27-Oct-2021 15:04:57	SciCord TestSampleManager1 <SciCordTestSampleManager1>	SciCord.PNG	StandardPrep!\$G\$4

The bottom of the interface shows a navigation bar with various tool tabs: Developer Tools, Info, Resource Usage, Instruments, ResourceTool, Barcode tool, Aliquots, Work Requests, Data, Attributes, History, Review Alerts, Signatures, Notes, Resources, and Attachments.

Subpanel – Attachment’s tab

Additional panels may be present such as Training Assignments or Moisture Interface depending on context.

- **Info:** displays information such as the document’s description, original template, author, review class, status, etc.
- **Resource Tool:** allows the user to view Resources based on Categories or to manually Search based on Name or Document Number and to Record the Resource into the opened Document.
- **Instruments:** The user can connect to an instrument that is recorded in the Document, retrieve readings from the instrument and view the Calibration Due Date, it’s last check date and the outcome.
- **Barcode Tool:** The user may record a resource into the Document by using the Barcode Tool
- **Aliquots:** The user can review the Aliquots (Samples) that have been associated with the Document.
- **Data:** The Data tab lists all the Data from the Document that is being extracted. The Data includes Aliquots, Test (Analyses), Method, Method Version, Measurement, Value and Raw Value, the Unit, and configurable Attributes 1-5.

- **Attributes:** Metadata, configured by the Template Developer, that is stored by the document and viewable to the user. Such metadata may also be used for reporting purposes.
- **History:** The user can view the history of any cell, worksheet, or workbook. Record of all dates and times of any document creation or modifications.
- **Review Alerts:** The user may view Review Alerts that are associated with the document. This function could lead a reviewer to potential issues with a document.
- **Signatures:** each electronic signature that is conducted within the document is listed; the Date, Signee, Signature Type and Meaning are recorded.
- **Notes:** allows a user to make Notes/Comments in any cell of the document. The user may create new Notes or Append old Notes. Each Note contains data on who it was Created By, the Date, the Note Text and Note Location. Once the document is in Complete status, the notes will disappear.
- **Resources:** a web linking any Resources used to the current Document.
- **Attachments:** this dialogue screen shows any item that is attached in the document. It provides details on the Description, Date recorded, Created By which User, and Source File.

Other Items that can be included in the Subpanel include:

- FD10 Interface, Raman Interface, GeoPyc Interface, Sympatec Interface, DVS Interface, and Usage Log

Structured Data

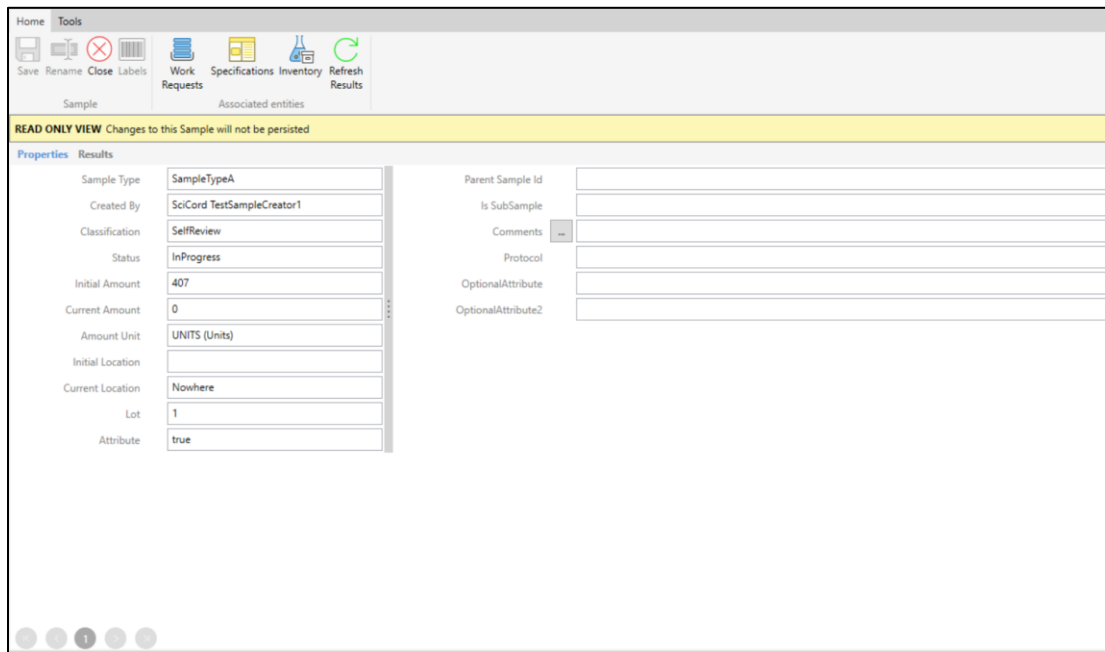
Structured Data is available and can be configured based on customer specific business logic. Structured Data consists of System Configuration information, such as Lists, Data extracted from Documents in the form of Analysis and Component Results, and Document Attributes in the form of ConfigAttribute Results.

Sample Editor

Properties

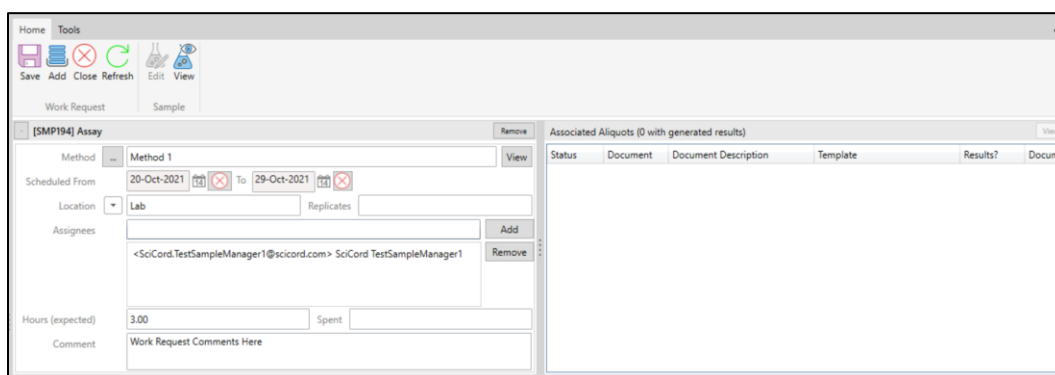
A user must have the Sample_Edit permission to Open a Sample for Edit and the Sample must be in either Created or In Progress/Rework Requested Status. A User may not Edit a Sample that is in Cancelled, Review, Approve or Available Status. The Sample Edit view opens onto the Sample's Properties tab. On the Left Panel of the Sample Properties are the Mandatory Sample Attributes that are configured using the SciCord Portal. The Right Panel contains Sample Properties that are Optional and configured using the SciCord Portal. Only the Attributes on the Right Panel can be Edited after the Sample has been Created.

Below are examples of Attributes that can be configured in the Portal as either Mandatory or Optional.



Sample Work Requests

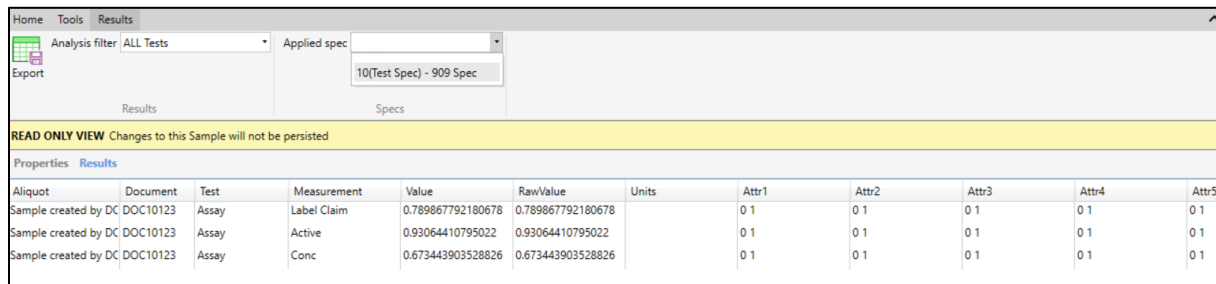
A user with the Sample_Edit permission may 'Add' Work Requests to a Sample. **Work Requests** are configurable using the SciCord Portal and a **Method, Location,** and **Comment** may be associated with each individual Work Request. The right-hand pane of the Work Requests interface provides a table for associated Aliquots, representing testing performed for a specific Sample and Analysis. The user may select and View the Document.



The Subpanel shows the User the Attachments, Aliquots, History, Comments, and Signatures tabs.

Sample Results

The Sample Editor provides a Results tab that is a view of the Structured Results/Data as related to the current Aliquot. An 'Export' function allows the User to save the listed results as an Excel (.xlsx) or Comma Separated Values (.csv) File on their machine.



Home Tools Results

Analysis filter: ALL Tests Applied spec: 10(Test Spec) - 909 Spec

Export

Results Specs

READ ONLY VIEW Changes to this Sample will not be persisted

Properties Results

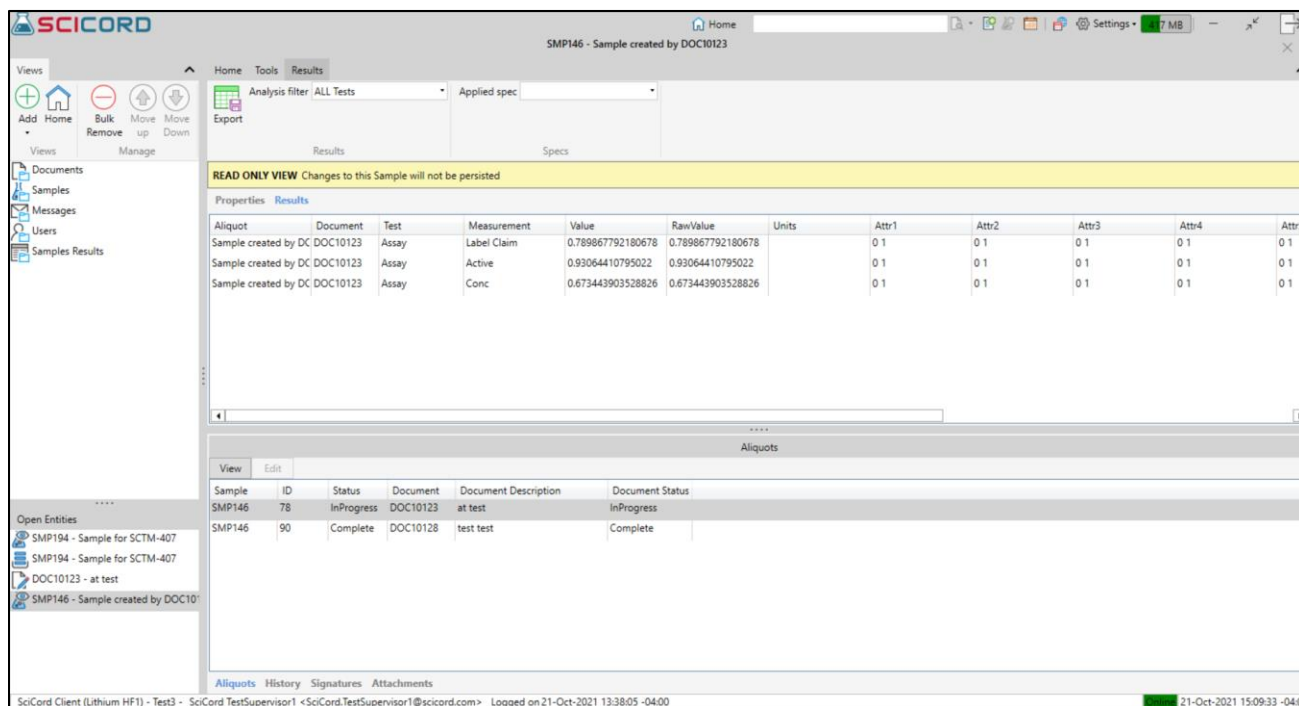
Aliquot	Document	Test	Measurement	Value	RawValue	Units	Attr1	Attr2	Attr3	Attr4	Attr5
Sample created by DC	DOC10123	Assay	Label Claim	0.789867792180678	0.789867792180678		0 1	0 1	0 1	0 1	0 1
Sample created by DC	DOC10123	Assay	Active	0.93064410795022	0.93064410795022		0 1	0 1	0 1	0 1	0 1
Sample created by DC	DOC10123	Assay	Conc	0.673443903528826	0.673443903528826		0 1	0 1	0 1	0 1	0 1

Samples Subpanel

In the Sample Editor, the Subpanel shows the User the Attachments, Aliquots, History, and Signatures tabs of the selected Sample.

Attachments

A User may browse Attachments and Add Attachments up to 20MBs. Attachments may also be added to the Sample from DataFiles. The User may Append the Attachment Description by typing into the Append bar and then selecting 'Append'. Although a User may Remove an Attachment, they can also easily Restore an attachment by 'Include Removed', selecting the Removed Attachment, and then selecting the 'Remove/Restore' button.



Home Tools Results

Analysis filter: ALL Tests Applied spec: 10(Test Spec) - 909 Spec

Export

Results Specs

READ ONLY VIEW Changes to this Sample will not be persisted

Properties Results

Aliquot	Document	Test	Measurement	Value	RawValue	Units	Attr1	Attr2	Attr3	Attr4	Attr5
Sample created by DC	DOC10123	Assay	Label Claim	0.789867792180678	0.789867792180678		0 1	0 1	0 1	0 1	0 1
Sample created by DC	DOC10123	Assay	Active	0.93064410795022	0.93064410795022		0 1	0 1	0 1	0 1	0 1
Sample created by DC	DOC10123	Assay	Conc	0.673443903528826	0.673443903528826		0 1	0 1	0 1	0 1	0 1

Aliquots

View	Edit	Sample	ID	Status	Document	Document Description	Document Status
		SMP146	78	InProgress	DOC10123	at test	InProgress
		SMP146	90	Complete	DOC10128	test test	Complete

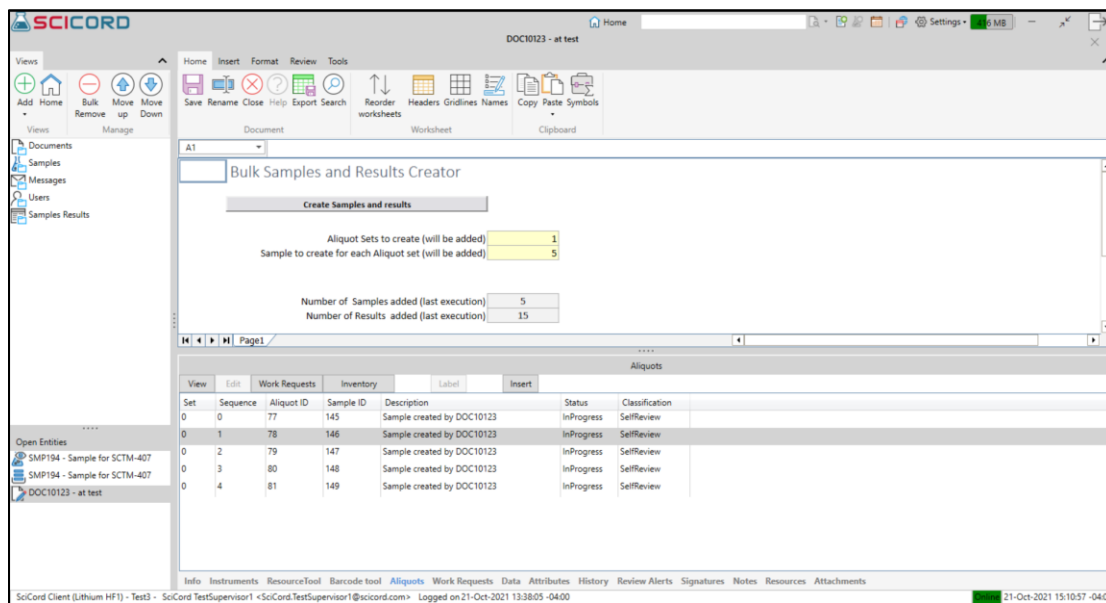
Aliquots History Signatures Attachments

SciCord Client (Lithium HF1) - Test3 - SciCord TestSupervisor1 <SciCord.TestSupervisor1@scicord.com> Logged on 21-Oct-2021 13:38:05 -04:00

21-Oct-2021 15:09:33 -04:00

Aliquots

Aliquots are instances where a parent Sample is introduced into a Document. Each single association between a Sample and a Document will represent a unique Aliquot ID. The User may either View or Edit the Document that the Aliquot is associated with by selecting the View/Edit buttons.



The screenshot displays the SciCord ELN/LIMS Client interface. The main window is titled 'DOC10123 - at test'. The 'Bulk Samples and Results Creator' window is open, showing the following configuration:

- Aliquot Sets to create (will be added): 1
- Sample to create for each Aliquot set (will be added): 5
- Number of Samples added (last execution): 5
- Number of Results added (last execution): 15

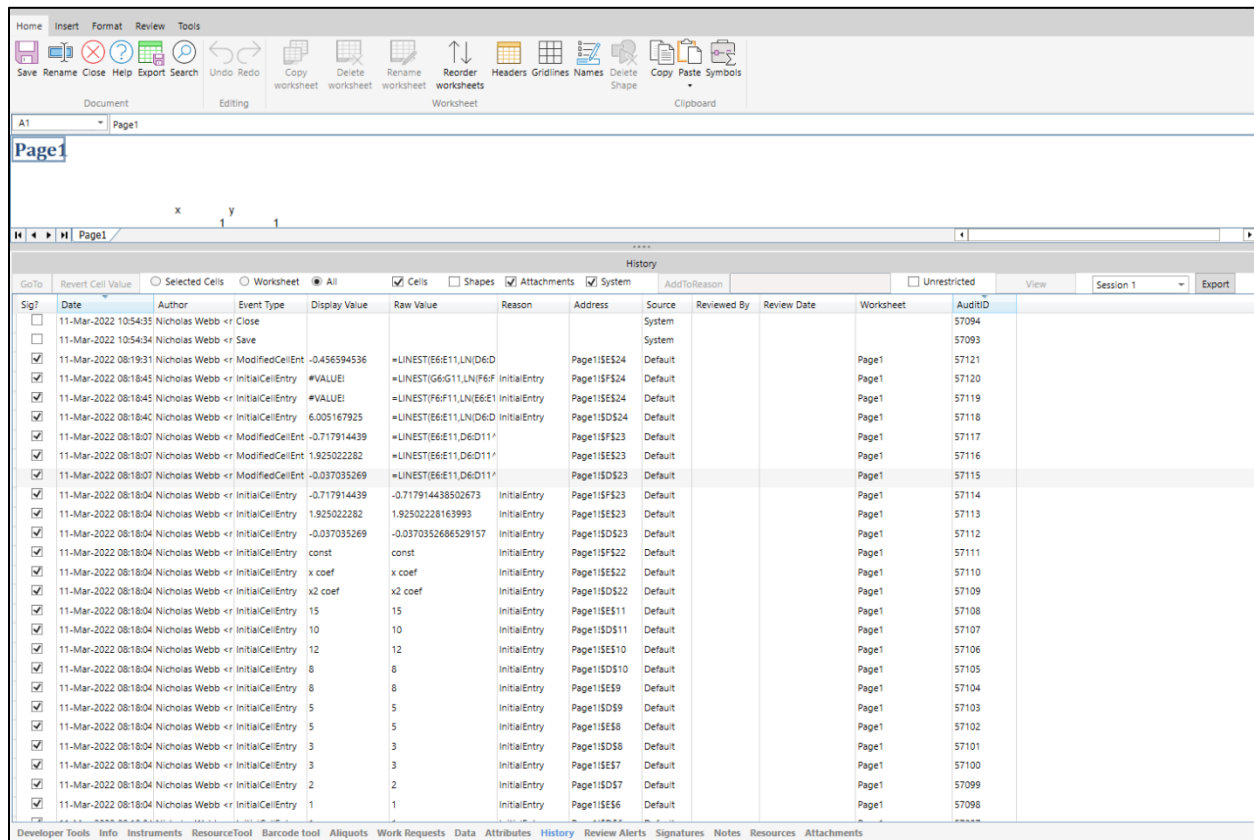
Below the configuration, the 'Aliquots' table is visible, showing a list of aliquots created by the user. The table has the following columns: Set, Sequence, Aliquot ID, Sample ID, Description, Status, and Classification.

Set	Sequence	Aliquot ID	Sample ID	Description	Status	Classification
0	0	77	145	Sample created by DOC10123	InProgress	SelfReview
0	1	78	146	Sample created by DOC10123	InProgress	SelfReview
0	2	79	147	Sample created by DOC10123	InProgress	SelfReview
0	3	80	148	Sample created by DOC10123	InProgress	SelfReview
0	4	81	149	Sample created by DOC10123	InProgress	SelfReview

The status bar at the bottom indicates the user is logged in as 'SciCord TestSupervisor1' on 21-Oct-2021 at 15:10:57.

History

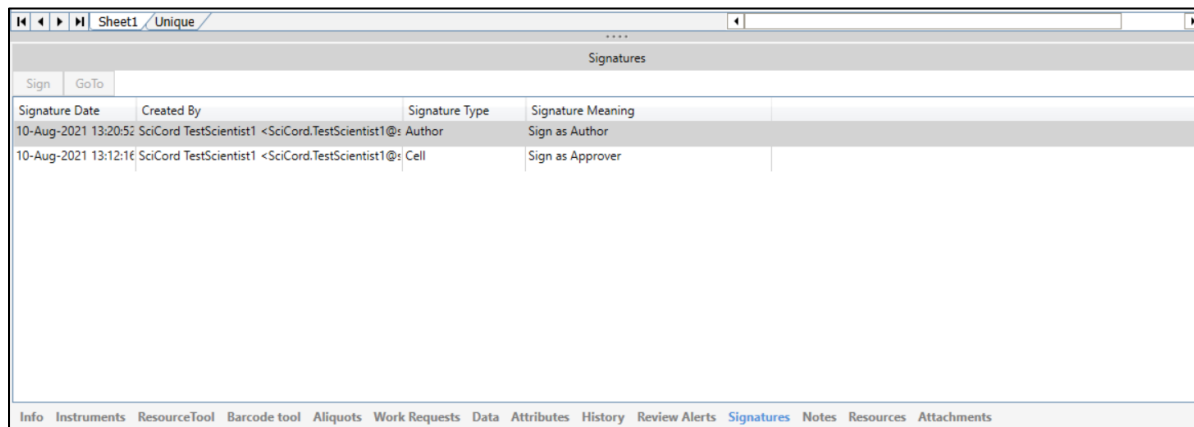
The History tab provides visibility and partial management of auditable events performed on a Sample. In a Sample Open for Edit a User can select events from the History table and append a reason via the 'AddToReason' button which will appear in the Reason column of the table.



Sig?	Date	Author	Event Type	Display Value	Raw Value	Reason	Address	Source	Reviewed By	Review Date	Worksheet	AuditID
<input type="checkbox"/>	11-Mar-2022 10:54:35	Nicholas Webb <r	Close					System				57094
<input type="checkbox"/>	11-Mar-2022 10:54:34	Nicholas Webb <r	Save					System				57093
<input checked="" type="checkbox"/>	11-Mar-2022 08:19:31	Nicholas Webb <r	ModifiedCellEnt	-0.456594536		=LN(E6:E11, LN(D6:D	Page1\$F524	Default			Page1	57121
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:45	Nicholas Webb <r	InitialCellEntry	#VALUE!		=LN(E6:E11, LN(F6:F	Page1\$F524	Default			Page1	57120
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:45	Nicholas Webb <r	InitialCellEntry	#VALUE!		=LN(E6:E11, LN(E6:E1	Page1\$F524	Default			Page1	57119
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:40	Nicholas Webb <r	InitialCellEntry	6.005167925		=LN(E6:E11, LN(D6:D	Page1\$F524	Default			Page1	57118
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:07	Nicholas Webb <r	ModifiedCellEnt	-0.717914439		=LN(E6:E11, D6:D11'	Page1\$F523	Default			Page1	57117
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:07	Nicholas Webb <r	ModifiedCellEnt	1.925022282		=LN(E6:E11, D6:D11'	Page1\$F523	Default			Page1	57116
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:07	Nicholas Webb <r	ModifiedCellEnt	-0.037035269		=LN(E6:E11, D6:D11'	Page1\$F523	Default			Page1	57115
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	-0.717914439			Page1\$F523	Default			Page1	57114
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	1.925022282			Page1\$F523	Default			Page1	57113
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	-0.037035269			Page1\$F523	Default			Page1	57112
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	const	const		Page1\$F522	Default			Page1	57111
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	x coef	x coef		Page1\$F522	Default			Page1	57110
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	x2 coef	x2 coef		Page1\$F522	Default			Page1	57109
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	15	15		Page1\$F511	Default			Page1	57108
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	10	10		Page1\$F511	Default			Page1	57107
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	12	12		Page1\$F510	Default			Page1	57106
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	8	8		Page1\$F510	Default			Page1	57105
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	8	8		Page1\$F509	Default			Page1	57104
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	5	5		Page1\$F509	Default			Page1	57103
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	5	5		Page1\$F508	Default			Page1	57102
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	3	3		Page1\$F508	Default			Page1	57101
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	3	3		Page1\$F507	Default			Page1	57100
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	2	2		Page1\$F507	Default			Page1	57099
<input checked="" type="checkbox"/>	11-Mar-2022 08:18:04	Nicholas Webb <r	InitialCellEntry	1	1		Page1\$F506	Default			Page1	57098

Signatures

The Sample Editor supports Digital Signatures for Author(s) and Reviewer(s). The Signatures tab displays all Signatures applied to a Sample, including final Approval signatures of Samples with 'PeerReviewApprove' classification and 'Complete' status. The user may also select a pending signature by a user as Author or Reviewer and sign by providing the proper password and meaning.





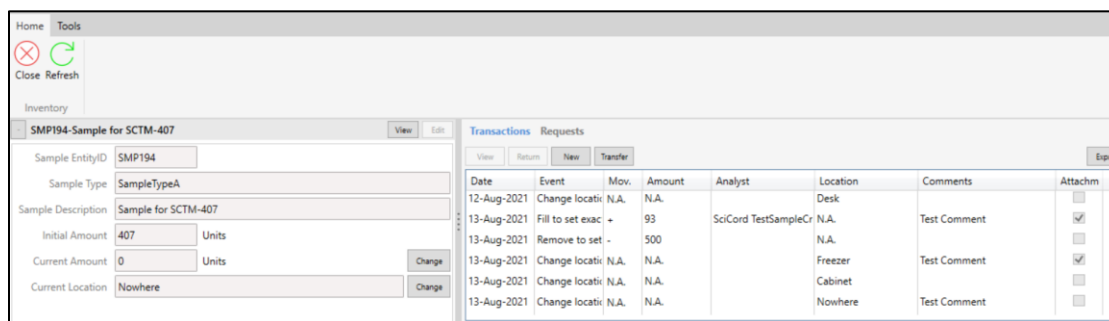
Sign	GoTo	Signature Date	Created By	Signature Type	Signature Meaning
<input type="checkbox"/>		10-Aug-2021 13:20:52	SciCord TestScientist1 <SciCord.TestScientist1@>	Author	Sign as Author
<input type="checkbox"/>		10-Aug-2021 13:12:16	SciCord TestScientist1 <SciCord.TestScientist1@>	Cell	Sign as Approver

Sample Inventory

The SciCord Solution supports Samples Inventory management and custody tracking across Samples' family. Inventory transaction can be booked and planned through previously entered inventory requests. The Samples Family is defined through the Parent-Sample relationship. A Sample may have multiple children and each child may have other children as well.

A user must have the SampleInventory_Edit, SampleInventory_View, SampleInventoryRequest_Edit, or SampleInventoryRequest_View permission to be able to open the SampleInventory view. Depending on the permission granted the user will be able to edit or view the Inventory Requests and Inventory Transactions. A user with any of the above-mentioned permissions will be able to export all Inventory Requests for all the Samples as an Excel or CSV file. A user with the SampleInventory_Edit or SampleInventory_View permission may export all Inventory Transactions as an Excel or CSV file.

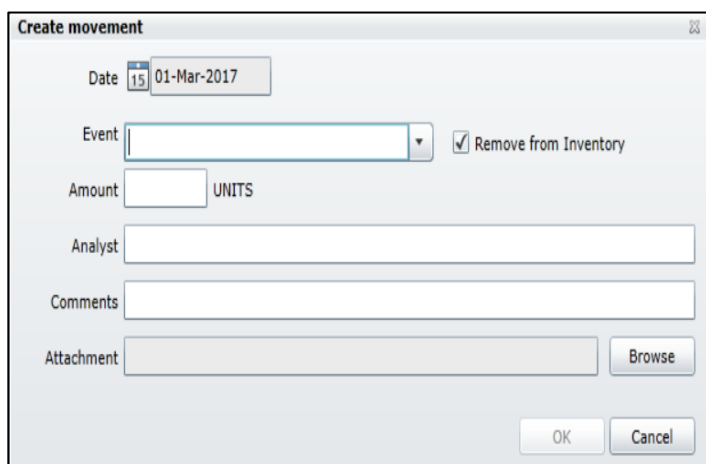
There are a couple of ways to access the Sample Inventory: 1) From a 'Samples' or 'MySamples' View, the user may select a Sample, and in the Sample Toolbar, click the 'Open the Sample Inventory' button ; 2) If a Sample is opened in either Edit or Read Only Mode, the user may click the 'Open the Sample Inventory' button in the toolbar .



Date	Event	Mov.	Amount	Analyst	Location	Comments	Attachm
12-Aug-2021	Change locati	N.A.	N.A.		Desk		<input type="checkbox"/>
13-Aug-2021	Fill to set exac	-	93	SciCord TestSampleCr	N.A.	Test Comment	<input checked="" type="checkbox"/>
13-Aug-2021	Remove to set	-	500		N.A.		<input type="checkbox"/>
13-Aug-2021	Change locati	N.A.	N.A.		Freezer	Test Comment	<input checked="" type="checkbox"/>
13-Aug-2021	Change locati	N.A.	N.A.		Cabinet		<input type="checkbox"/>
13-Aug-2021	Change locati	N.A.	N.A.		Nowhere	Test Comment	<input type="checkbox"/>

Inventory Transactions

Inventory Transactions are used to record actual movements from or into the Inventory. The Transaction can either be recorded from scratch or created following a previous Inventory Request (see Inventory Requests). In the latter case, the system will keep the link between the Request and the Transaction. To create Inventory Transactions a User must have the SampleInventory_Edit permission.



Create movement

Date: 15 01-Mar-2017

Event: Remove from Inventory

Amount: UNITS

Analyst:

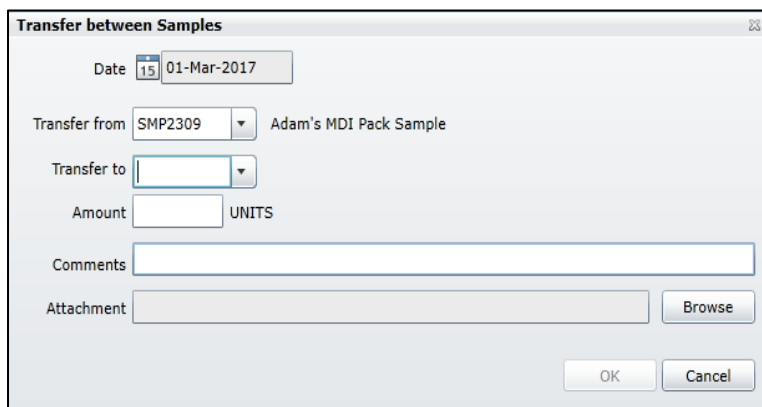
Comments:

Attachment:

A user may set the Transaction Date, set an Event (Pick, Return, Fill, TransferIn, TransferOut, Disposal), set an Amount to be removed or added to the current amount, record an Analyst the amount was dispensed to or returned from, record any Comments or any Attachments. With each

transaction the SciCord System will automatically record the user who recorded the data, local time, and system timestamp.

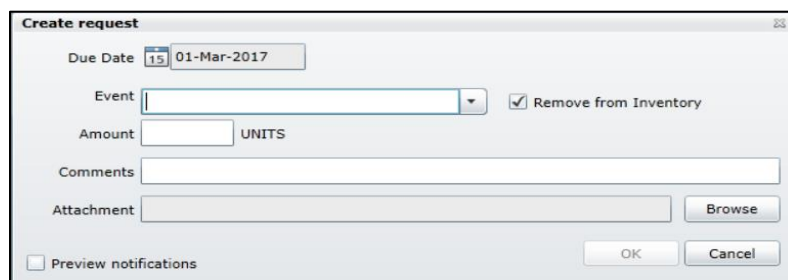
A user may also Transfer material between Samples. A user with the SampleInventory_Edit permission may conduct a Transfer. A Transfer will generate two transactions: one removing material from the Source and the other adding material to the selected 'Transfer to' Sample.



The Transactions may be exported as either an Excel file (.xlsx) or as a CSV (.csv) file.

Inventory Requests

Inventory Requests are made by users, generally Scientists, to request a quantity of a particular Sample or to book a restitution. Inventory Requests track only the request of the material, while the actual movement from or into the inventory will be recorded by creating corresponding Inventory Transactions. Only the User with the SampleInventory_Edit or SampleInventoryRequest_Edit are able to create Inventory Requests and mark/unmark existing requests as 'Complete'.



When creating a Request a user may set a Due Date, select an Event (Pick/Return), set an amount to be added (Pick) or removed (Return), make a comment, or record an attachment. As each Request is completed the SciCord System will automatically record the user who made the request, the local time/system timestamp, and allows a User to send notification of the Created Request to the interested parties. The Requests may be exported as either an Excel file (.xlsx) or as a CSV (.csv) file.

Enhanced Location management

Ability to define nested locations. A location can be a building, a room, an equipment, a box, etc.

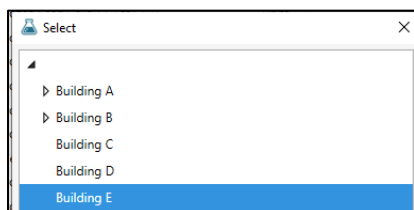
A location will have the following attributes:

- Name, mandatory and unique across the system
- Description, optional
- Barcode, optional and unique across the system
- A parent location - mandatory
- A position relative to the parent location - see below
- A flag that mandates each child to this container to have a position set
- A flag that allows (or not) to have more than one child in the same position



Change location dialog box with the following fields:

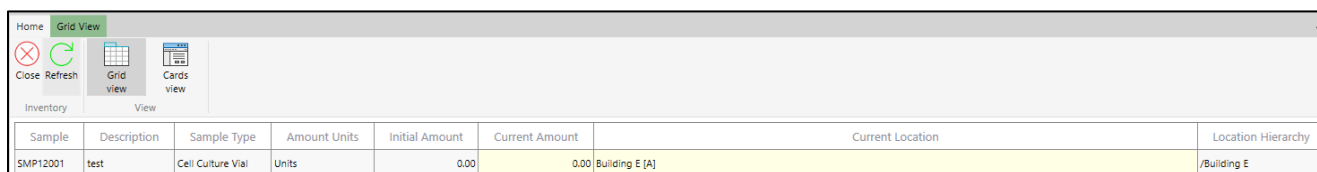
- Location: Building E (with a Browse button)
- Position: A
- General Notes: Test Note
- Attachment: (with a Browse button)
- OK and Cancel buttons at the bottom.



Select dialog box showing a list of buildings:

- Building A
- Building B
- Building C
- Building D
- Building E (highlighted)

Inventory Change Location



Inventory Change Location screenshot showing a table with the following data:

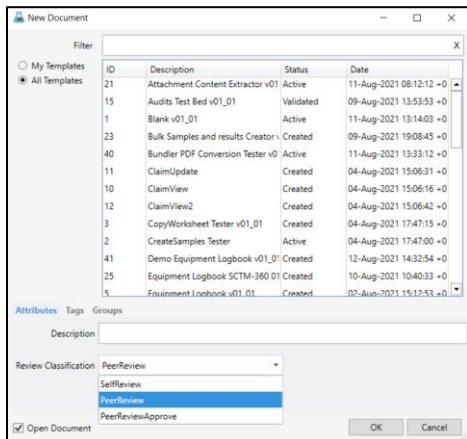
Sample	Description	Sample Type	Amount Units	Initial Amount	Current Amount	Current Location	Location Hierarchy
SMP12001	test	Cell Culture Vial	Units	0.00	0.00	Building E [A]	/Building E

Document and Sample Life Cycle

The SciCord Solution provides Document and Sample Management capabilities for SciCord generated Documents and Samples. Document and Sample management includes support for authenticated electronic signatures and controlling the review and approval processes.

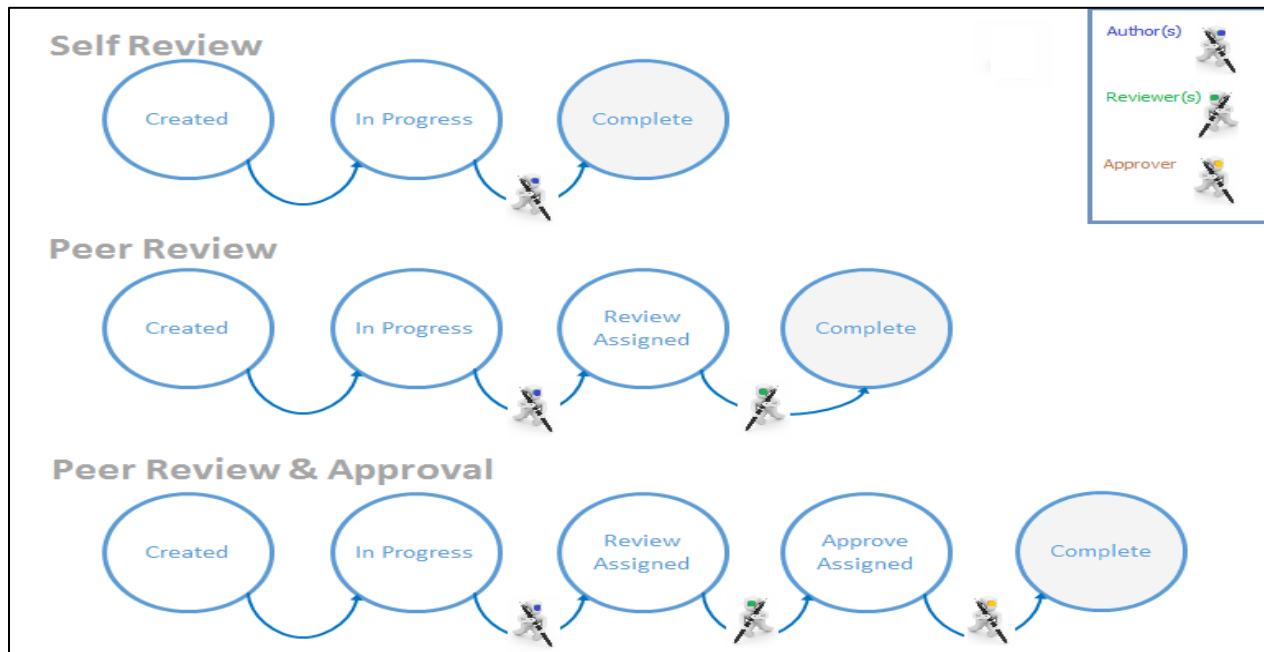
Document Life Cycle

The Life Cycle (Workflow) is determined by the user at the creation of the Document by selecting a Review Classification from the drop-list, however, the workflow may be changed afterwards by selecting the Document and then selecting the **'Modify Status'** in the Documents or MyDocuments toolbar. Only a user with one of the **Document_ReviewClassUpdate** permissions is allowed to modify the Document workflow.



Review Classifications

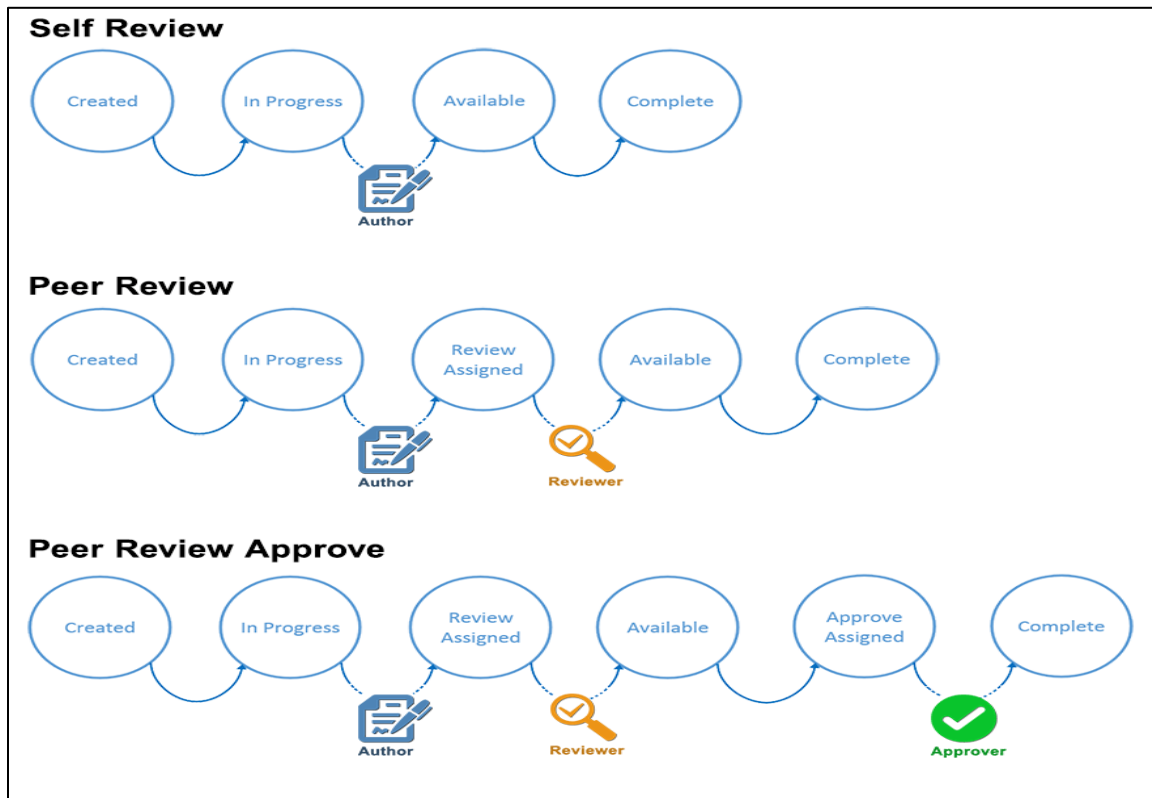
Below is an example of each Document Workflow (Review Classification)



Sample Life Cycle

As part of the Sample Type configuration, the Sample Type will have a default Review Classification (Workflow) upon creation. This Workflow may be changed only by a user with one of the **Sample_ReviewClassUpdate** permissions. To do so, the User would have to select the Sample in the Sample/MySample View and then select the **'Modify Status'** button in the toolbar. From the Sample Status dialogue, the user will be able to modify the workflow.

Below is an example of each Sample Workflow (Review Classification)



Electronic Signatures

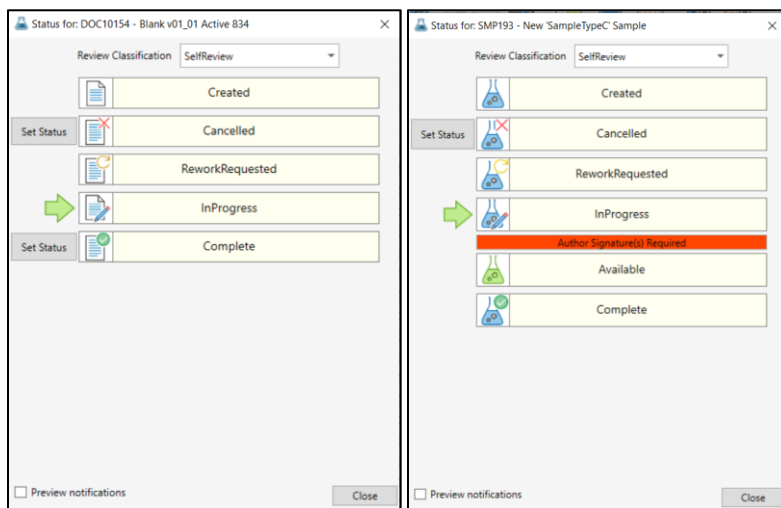
The Document/Sample Editor supports in-line management of digital Signatures for Author(s), Reviewer(s). A Signatures tab in the subpanel displays all signatures applied to the Document, including final Approval signatures of Documents with 'PeerReviewApprove' classification and 'Complete' status.

Self-Review

The Self Review workflow process includes the Document or Sample Creation, InProgress, and Complete phase. A Document or Sample may also be Cancelled or a Rework Requested. A Sample may be set to 'Available'

By selecting 'Set Status' besides 'Complete', or any of the phases (if available) the Document will be in Complete Status.

Below are images of the Workflow for a **SelfReview** Document and Sample.



Self-Review Document

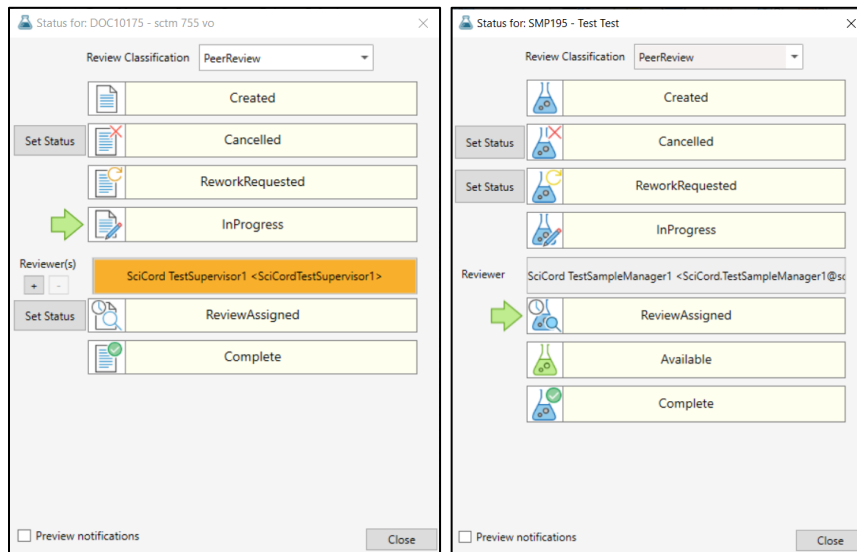
Self-Review Sample

**Note: Samples include an 'Available' phase in their Life Cycle.*

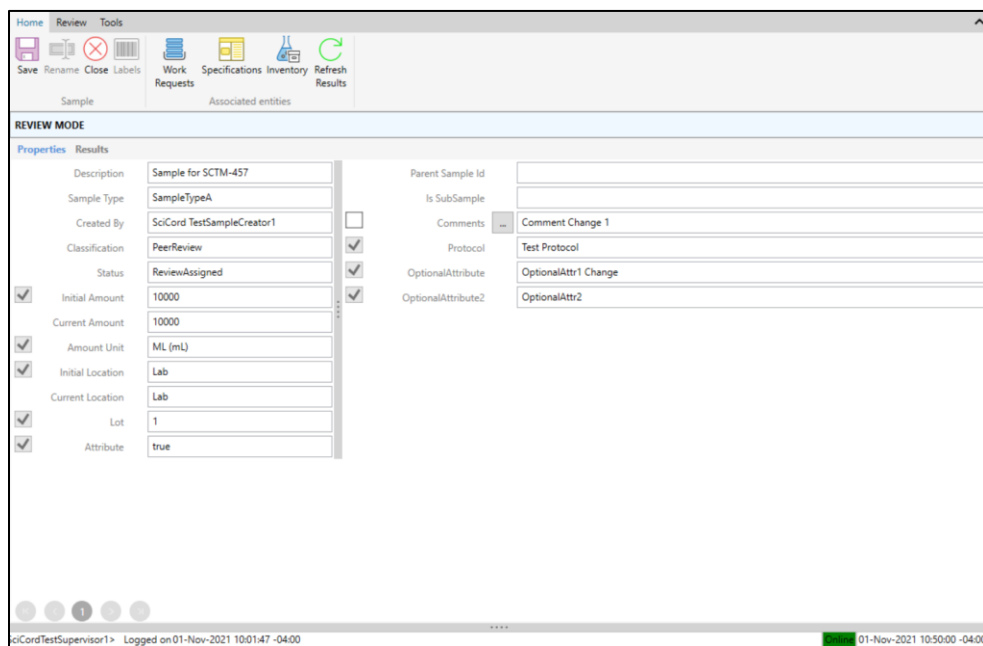
Peer Review

The Peer Review workflow process includes the Document or Sample creation, InProgress, Review (ReviewAssigned), and Completion. A user may also choose to set the Document or Sample to Cancelled, or have the Document or Sample be Reworked (ReworkRequested).

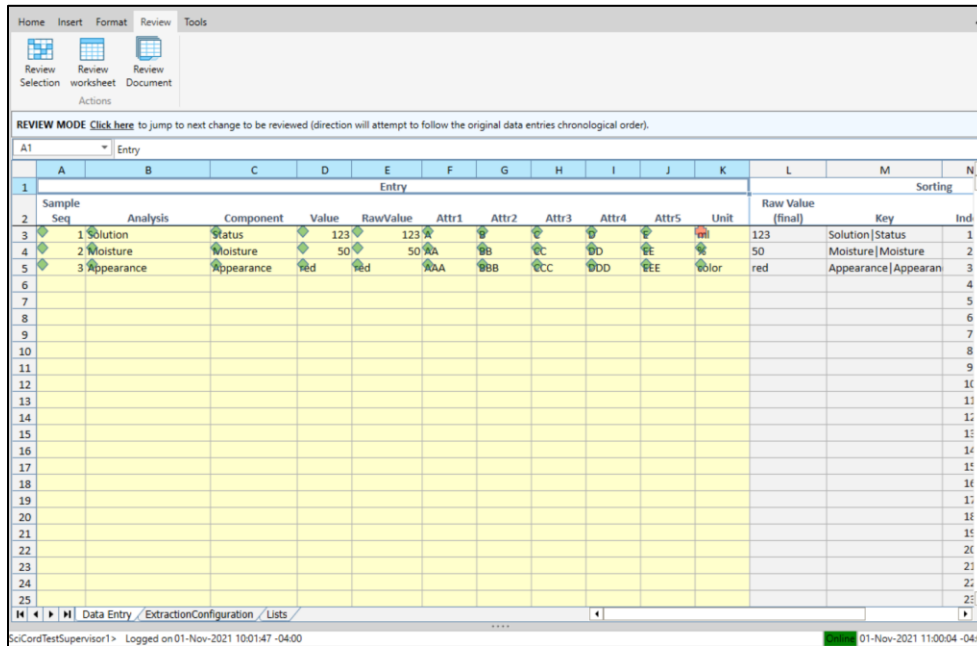
If the user were to select the 'Set Status' icon besides the Cancelled text, the Document will be in a Cancelled state. If the user would select the 'Reviewer' then the user would be able to select from a dialogue box, the Reviewer who would Review the Document.



Below are images of the Workflow for a **Peer Review** Document and Sample.



Sample in Review Mode



Sample Seq	Analysis	Component	Value	RawValue	Attr1	Attr2	Attr3	Attr4	Attr5	Unit	Raw Value (final)	Key	Ind
1	Solution	Status	123	123							123	Solution Status	1
2	Moisture	Moisture	50	50	AA	BB	CC	DD	EE		50	Moisture Moisture	2
3	Appearance	Appearance	red	red	AA	BB	CC	DD	EE	Color	red	Appearance Appearan	3

Document in Review Mode

When a Reviewer opens a Document for Review, they will notice several symbols within the Document related to their Review.



- The visible entry in the cell is the initial entry.



- The visible entry in the cell is not the initial entry and the history of the cell should be reviewed using the History subpanel.

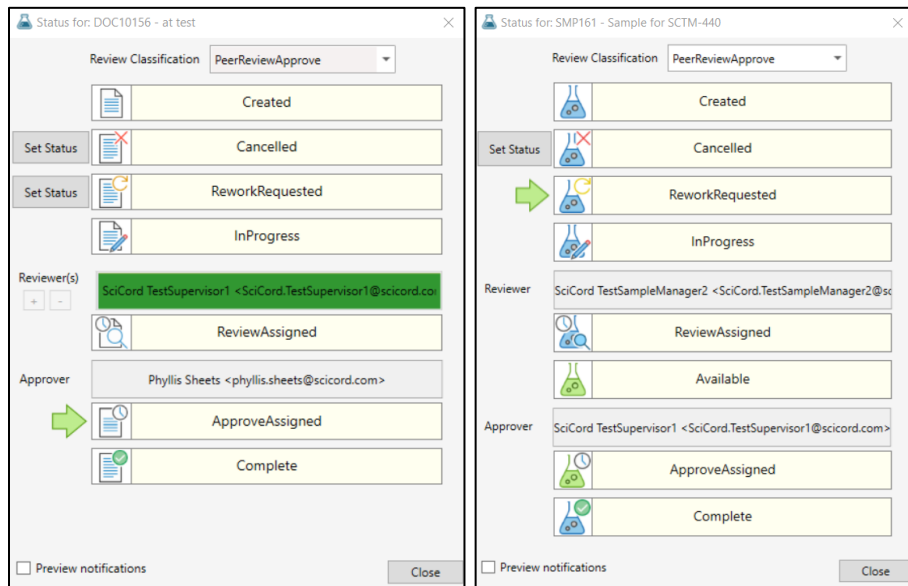
The Review may also view the subpanel Review Alerts tab, which highlights events requiring attention for the current Document. Examples of Review alerts are: Unlocking a cell, Balance not stable at time of recording, Balance not checked on day of usage, Instrument Calibration past due date at time of recording, or Document Template not validated at time of Document Creation.

Peer Review Approve

The typical PeerReviewApprove workflow process for a Document or Sample would include the Document or Sample creation, InProgress phase, ReviewAssigned, and ApproveAssigned. At any point a User may Cancel or assign the Document or Sample to ReworkRequested.

The green depicts which stage of the workflow process (Reviewed) that the Document or Sample (Rework Requested) is on. In this example the Document is in the ApproveAssigned phase of the workflow process.

Below are images of the **PeerReviewApprove** workflow for a Document and Sample.




Document in PeerReviewApprove

Sample in PeerReviewApprove











Document Review

Documents that are assigned to the user for review may easily be viewed in the MyReview View. The default filtering of this View is Status: ReviewAssigned and Reviewer: the user's name. If there is a need, the user may change these default settings to include other users as well.
























From the MyReview view the user can select a Document and then click on the 'Open Document for Review',  icon. After selecting the icon, the Document will open and be able to be Reviewed. Also, the User may view either the Documents or MyDocuments view and, looking at the icon column, determine whether a Document is in Review status by observing the 'Open Document for Review' icon. If the Document is in Review status, only the user who has been assigned to Review will be allowed to access the Document for Review.

SciCord Icons and their Meanings

SciCord Icon	SciCord Icon Meaning
	Create a Document
	Open Document for View/Read Only Mode
	Open Document for Edit
	Clone a Document
	Review a Document
	Modify Document Status
	The Review Classification is set to Approve Assigned
	The Review Classification is set to Review Assigned
	Document is In Progress
	The Document is Cancelled
	Rework Requested Document
	The Document is Complete
	Unlock a Document/Sample
	The Document/Sample is locked
	Refresh the SciCord Client
	Fetch All
	Duplicate View
	Export View or Save this Document as a Local Excel File
	Bookmark - Add to My "x" View, where x is any view

	Bookmark - Remove from My "x" View, where x can be any view
	Add to Groups
	Remove from Groups
	Message Alert
	New Message
	Read Message
	Dismiss Message
	Create a Sample
	View Sample
	Edit Sample
	Clone Sample
	Review Sample
	Modify Sample Status
	Sample Status is In Progress
	Sample Status is Available
	Sample Status is Cancelled
	Sample Status is Rework Requested
	Sample Status is Review Assigned
	Sample Status is Approve Assigned
	Sample Status is Complete
	Print Labels for Selected Samples
	Open Sample Inventory
	Open Inventory Calendar
	View Sample Work Requests







	Delete Sample Work Requests
	Close and Save Changes
	Open the Sample Work Request Calendar
	Open Sample Specifications
	Add Sample Specification
	Clone Sample Specification
	Close View
	Move a View in the View pane up
	Move a View in the View pane down
	Create or Add a new navigation view
	Home Dashboard
	Bulk Remove/Delete
	Delete View
	Rename a View/Document/Sample
	Set Tags
	Documents View
	MyDocuments View
	Samples View
	MySamples View
	Data Files View
	MyDataFiles View
	Groups View
	Inventory Requests View
	Messages View

	Resources View
	MyResources View
	Reports View
	MyReports View
	Results View
	Sent Messages
	Specifications View
	Work Requests View
	Templates View
	MyTemplates View
	User View
	MyUsers View
	MyApprove View
	MyReview View
	Download files
	Upload files
	Data File Properties
	Delete Data File
	Data File History
	Data File Signature
	Settings
	Open SciCord Portal
	Open Resource Read Only

	Open Resource for Edit
	Print Labels for Selected Resource
	Open Resource Inventory
	Resource in Review Status
	Resource Status is Complete
	Resource Status is Cancelled
	Help
	Login
	Logout
	Save
	Search
	Copy Worksheet
	Delete Worksheet
	Rename Worksheet
	Reorder Worksheets
	Toggle Worksheet Headers
	Show Gridlines
	Names Manager
	Delete Shape
	Copy
	Paste
	Symbols
	Insert Signature

	Insert File Attachment
	Create New Worksheet
	Import from a Workbook
	Insert Textbox
	Insert Line
	Insert Image
	Insert Chart
	Insert Date
	Insert Analyst
	Insert Note
	Bold
	Italicize
	Underline
	Left Justify
	Center Justify
	Right Justify
	Text Color
	Word Wrap
	Cell Fill color
	Cell Border
	Cell Format
	Shrink Columns
	Expand Columns
	Shrink Row

	Expand Row
	Insert new rows or columns
	Delete rows or columns
	Review Marks
	Change Marks
	Toggle Subpanel
	Barcode Scanner
	Display Calendar
	Stopwatch
	Open URL
	Cell Editor
	Switch User
	Print Entire Workbook, Current Page, or Selection
	Print Preview for Workbook, Current Page, or Selection
	Printer Page Setup
	Scheduling
	Hide
	Manage Reports
	View Report Details
	Launch Report
	Redo
	Settings
	Columns

	Filters
	Close Current Page
	Expand or Collapse Tools Panel
	Review Selection– provides the Reviewer the ability to ‘Review’ each cell in a worksheet individually. By selecting the icon, the Review symbol will be removed.
	Review Worksheet– provides the Reviewer the ability to ‘Review’ each worksheet in totality. By selecting the icon, the Review symbols will be removed from the worksheet.
	‘Mark Document as Reviewed’ – provides the Reviewer the ability to ‘Review’ the workbook in totality. By selecting the icon, the Review symbols will be removed from all areas of the workbook.