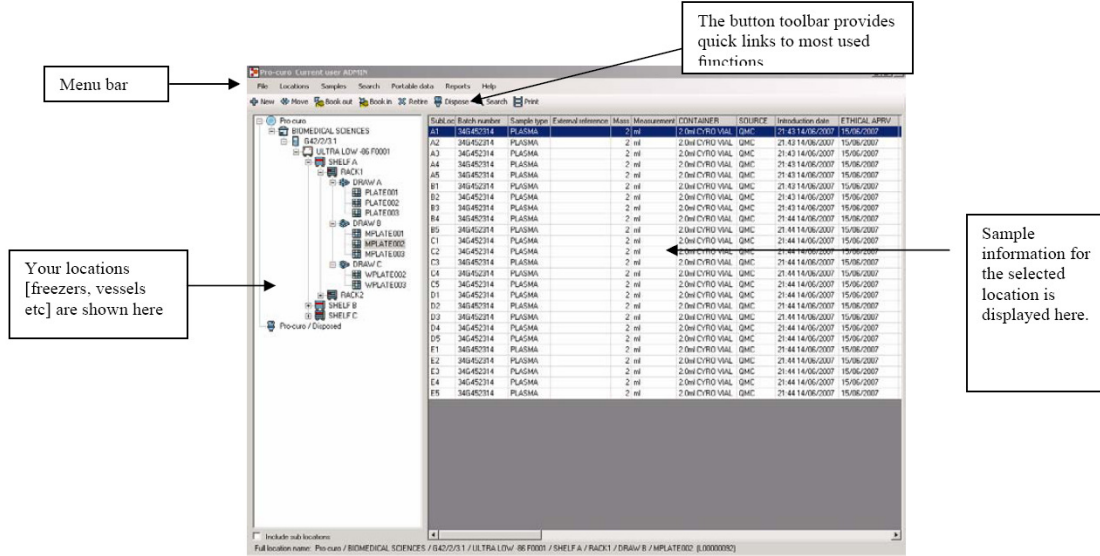


Pro-curo user manual.

Getting started

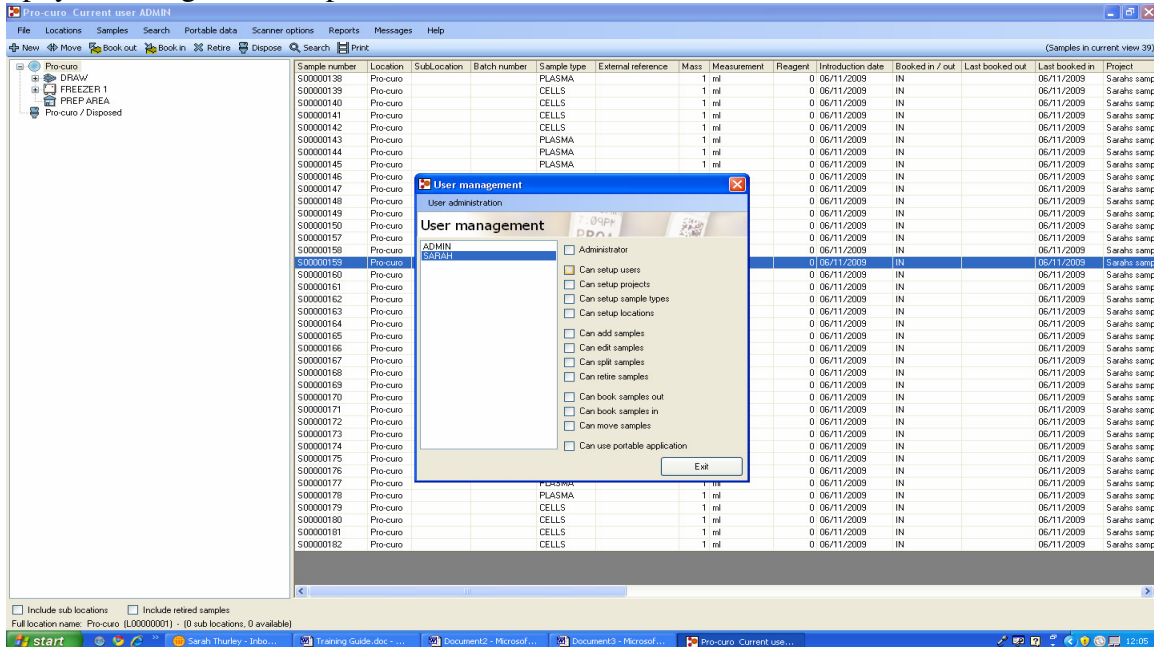


- Company details

The company details need to be set up before you begin in pro-curo this is done by going in to file – setup – company details then enter your details in this box.

- Users (Anyone who will want access to the system)

Everyone who uses the system must have a login name and password. To set each person up you must go file-setup-users.



Click on user administration, and then add in user name, you can then define how much the user can do with in the system. If full admin rights are needed then select administrator otherwise select what you want the user to be able to do with in the system e.g moving samples, disposing of samples etc

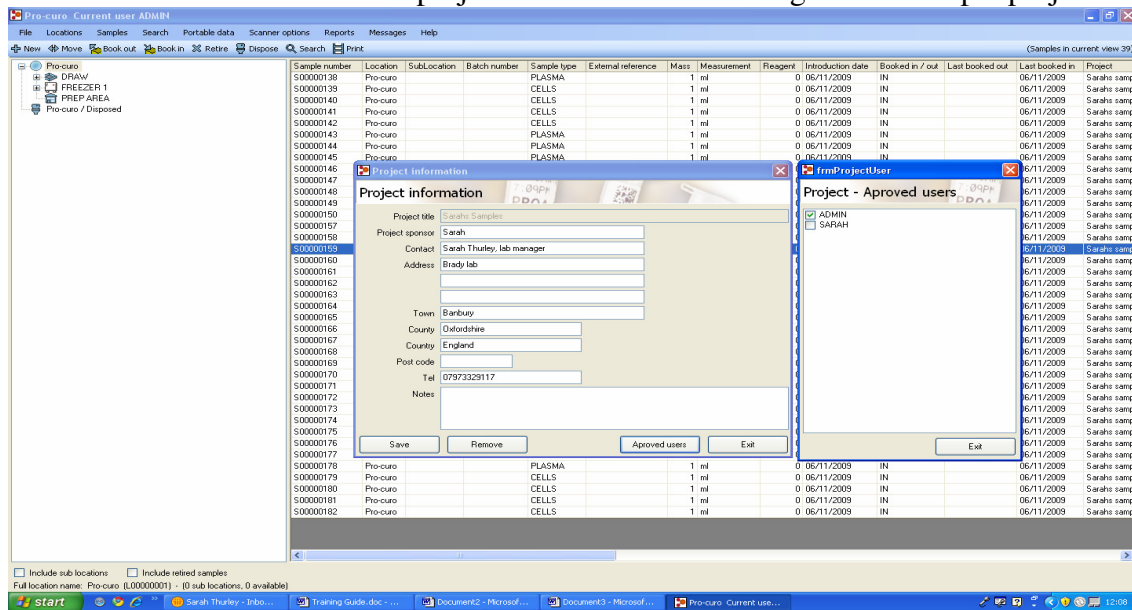
When a user is created initially their password is their login name, the system will then ask them to change this the first time they login. If a password is forgotten then the administrator can force a password change and this will default their password back to their login name.

If you remove a user and then later want to re add them it is not possible, as you have effectively retired that user and as they will have actions against that login name the system does not allow you to then duplicate the person.

- **Research projects**

Research projects are needed so that you can have multiple departments using pro-curo, research projects will then have users added to them.

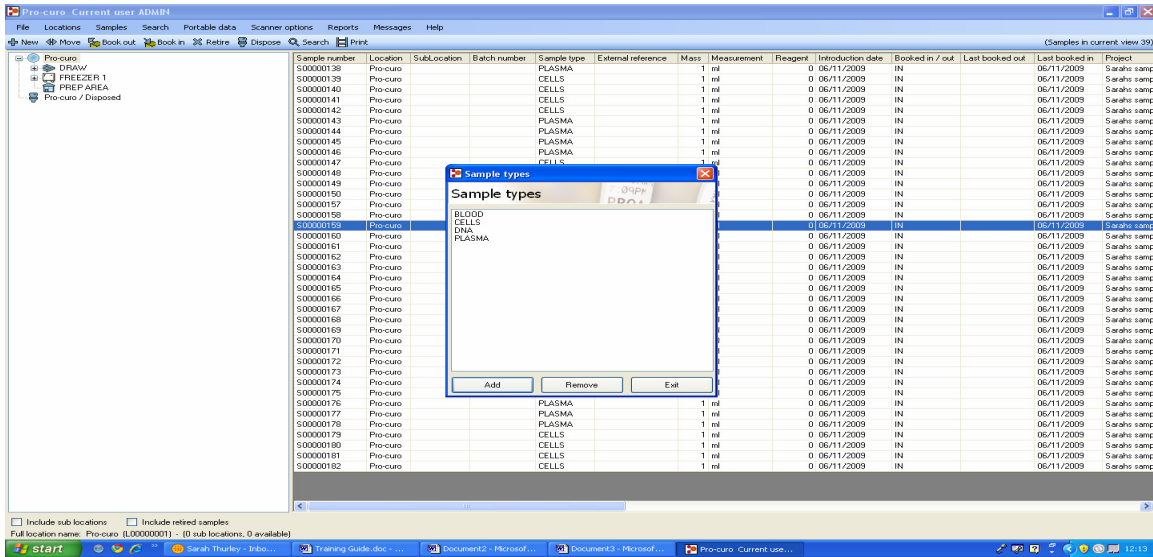
Several users can be added to a project and a user can be assigned to multiple projects.



- **Sample types**

This will allow you to select what the sample is that you are entering into the system when adding a sample.

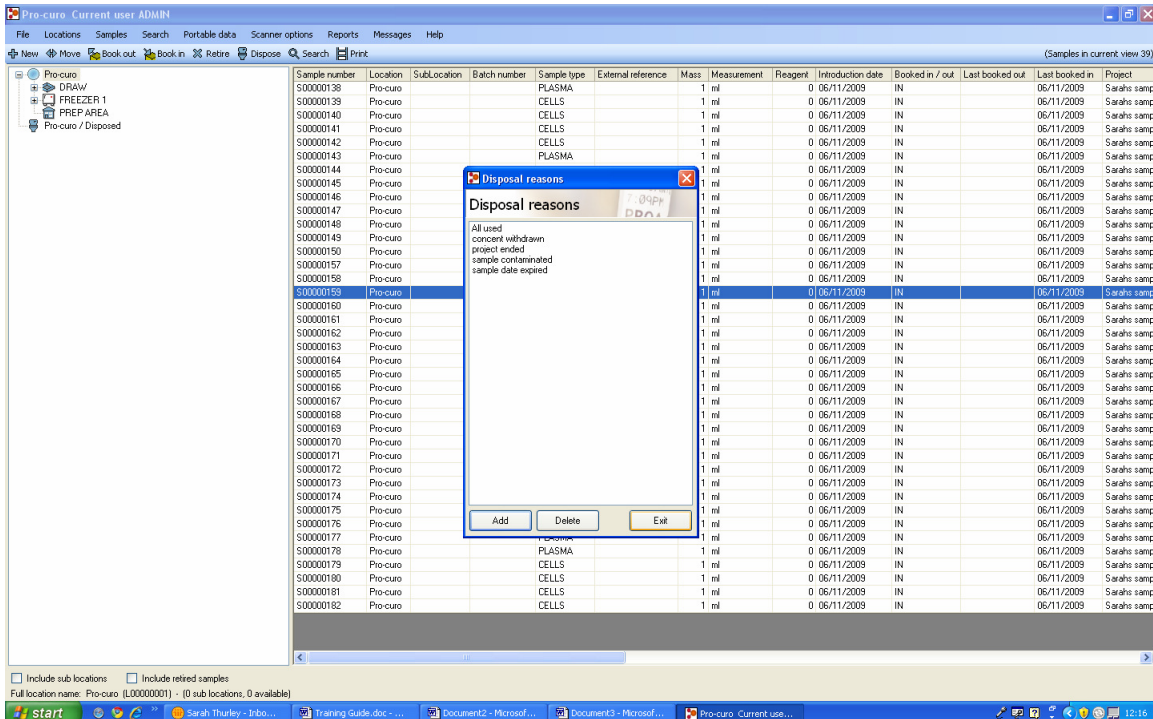
You can add as many sample types as desired.



- Disposal reasons

When a sample is disposed of a reason for disposal is needed you can add this through the file-setup-disposal reasons. The disposal reason will be shown in the history of the sample

You can then add as many reasons as needed, and if needed delete the reasons also



- User fields for samples

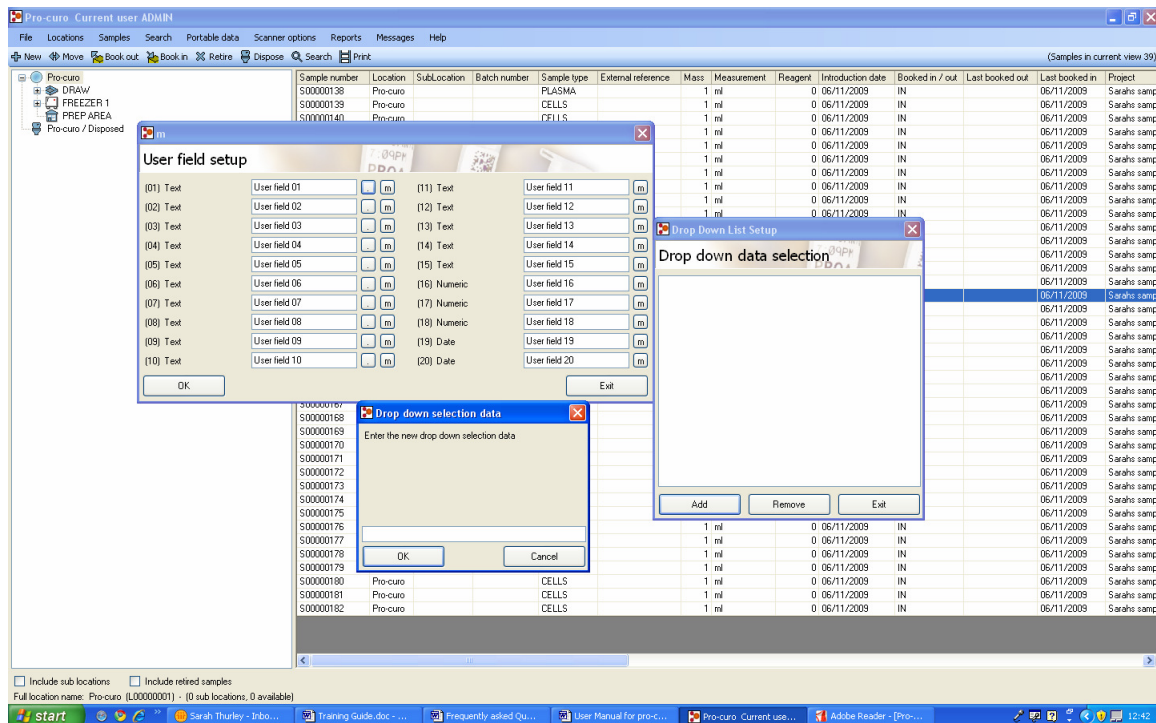
In addition to the pre-formatted fields which you can't change, you have 20 user definable fields, where the headings can be changed to represent any data specific to your

samples, the first 10 of your user fields can be pre-loaded with a list of possible values, this allows quick data entry and a reduction of errors [it is possible for these 10 fields to be either only selectable or where users are able to update the list by typing new information into the field (selected within the system settings)]

The next 5 user fields are free flow fields where users can enter anything, then the following 3 are alphanumeric and the final 2 fields are calendar fields, the user is asked to select a date from the graphical calendar, this is to make sure that there can be no miss understanding of what date format to use.

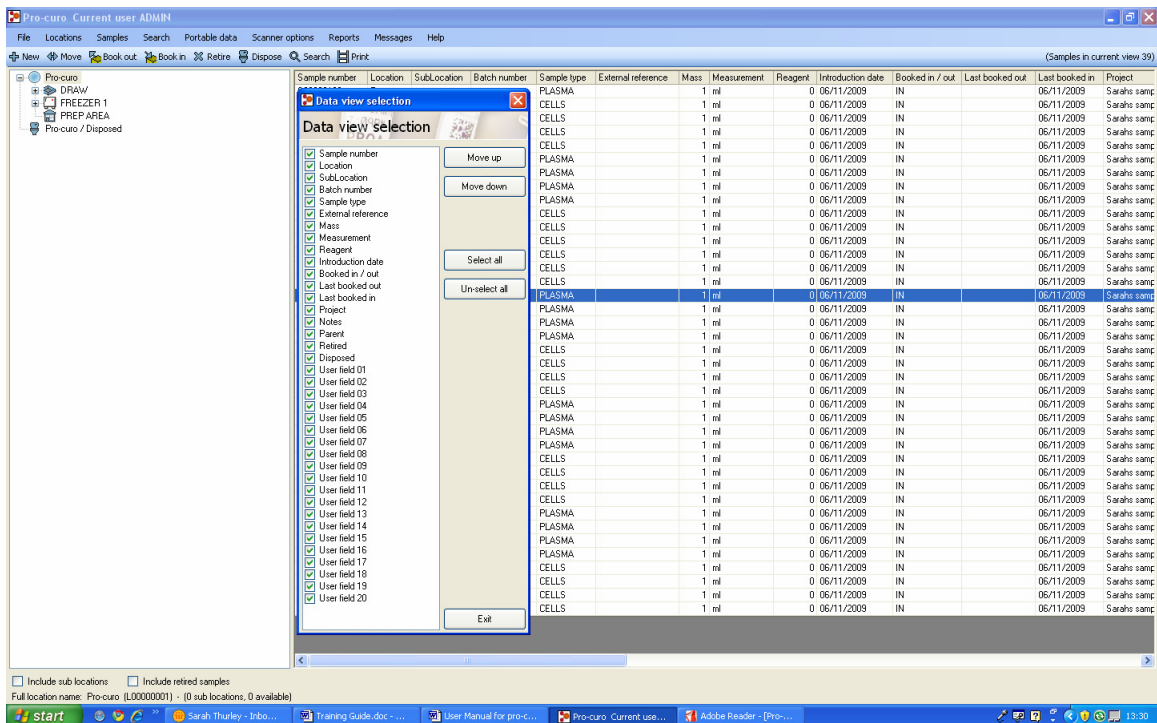
The user fields can be defined under File, set-up, user fields. Finally in user field set up you can define if a field is to be mandatory. If you select the m next to the a certain user fields if you click this the sample can not be added unless this field is filled in.

To make them strict drop down only or drop down and type in there is a check box on the system settings screen accessed from the main file menu and setup icon



- **Order columns**

The columns can be placed in the desired order so that you can see the most relevant to your lab. So if you use external reference and batch number daily you may wish to have these visible in the first few columns.



- Labels setup

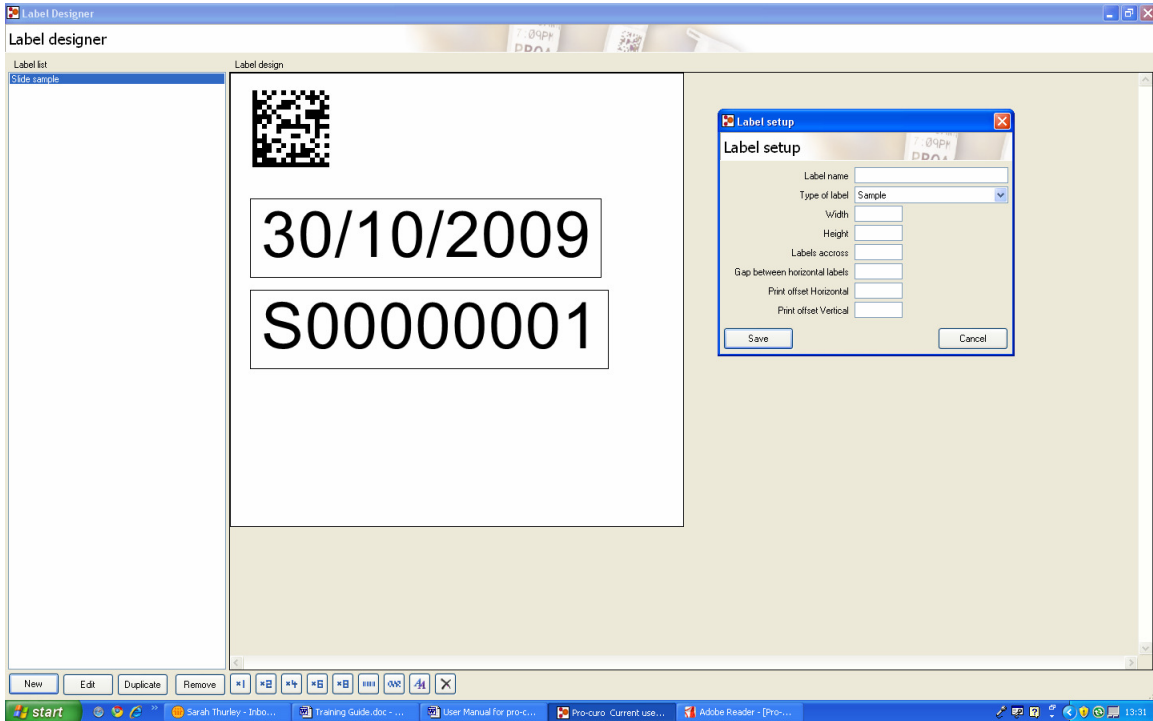
The graphical label designer is for groups that have higher numbers of label templates and have a requirement for greater flexibility than the BASIC label designer can offer. The label designer screen is access from the main setup menu, the designer shows the current template names on the left hand side of the screen, using the buttons at the bottom left side of the screen you can choose to create a new label template [which allows you to enter a label name and set the height, width and format of the label] or remove/edit an existing template, when you highlight a label template on the left of the screen the right screen changes to show a graphical representation of that template.

Using the toolbar at the bottom right of the screen you can choose to change the magnification of the graphical representation [options are x2, x4, x6 and x8] this allows you to work with both large labels and very small label designs. The next set of buttons allow you to add Linear barcodes, 2D Datamatrix barcodes and text/Database fields[you can choose ANY field including user fields to appear on the label]. The last two buttons allow you to remove fields from the label and test-print the template.

The designer allows for unlimited label designs (templates) to be created and named any thing you wish to call them.

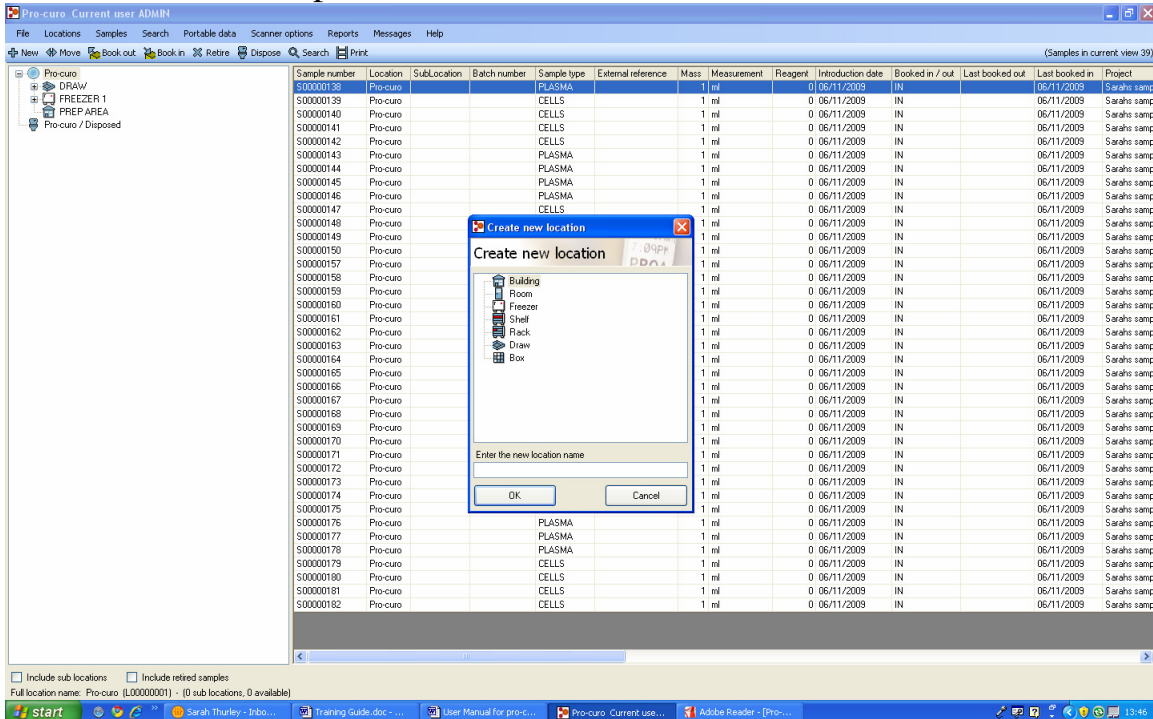
Printing a label couldn't be simpler, when you highlight a sample record (or multiple records using Ctrl or Shift keys) you can click the print button, here you will get the

Label selection screen, simply select the printer you wish to print to and the template you wish to print and click OK. The label will then be produce



General use

- Location set up

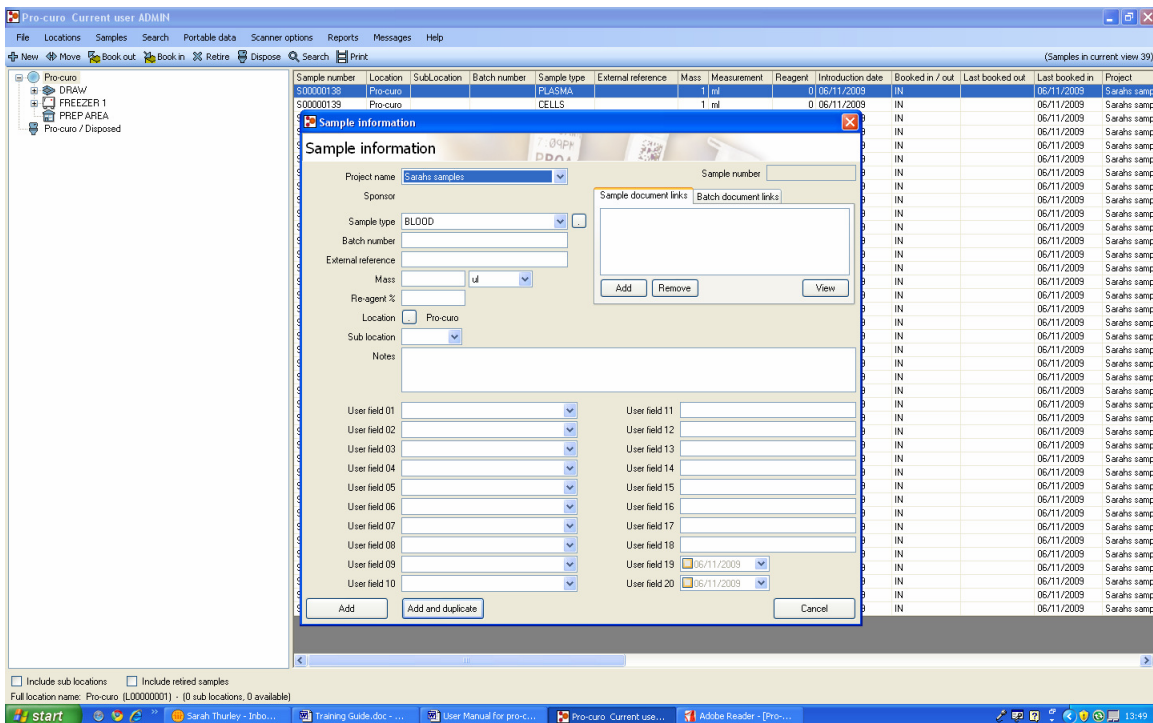


To set up a location go to location then select new location, this will bring up a selection box in which you can select what the location type will be from building to freezer to box. Once this is selected you can name the location something more relevant to your personal set up for example room may be lab 1.1 and freezer may be -80 freezer2.

- **Sample set up**

The pro-curo system is shipped with a number of preformatted fields, which can be used to form the basis of any sample inventory system; Projects can be assigned to samples that will enable you to quickly view just your projects samples and also to restrict them from the view of your colleges. The project name also relates to the samples owner.

In addition to this field with the sample type field, which can be pre-loaded with sample types your groups will be using (although new sample types can be added in at any time). Other pre-formatted fields are Batch no [numerated patient ID or donor ID], External reference [any unique data already contained on the sample, such as a pre printed barcode number], Mass [volume, weight] and a large notes fields that can allow copy and paste from any other Windows application.

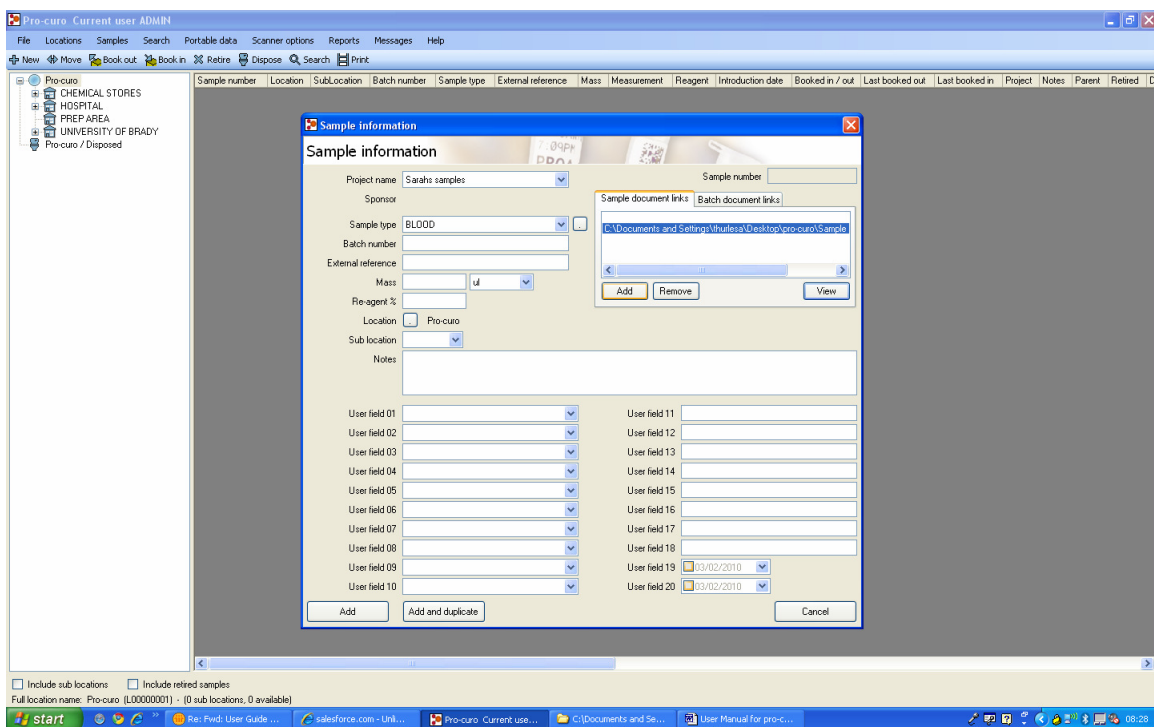


Once the sample has been created then you then have the options to add the sample or add and duplicate, if you are assign several similar samples at the same time.

- Sample and Batch document links

To add a document to a sample simply click on add this will then allow you to select a document that you want to add to the sample. Click on Open and this will attach. To view these documents highlight it in the box and select view.

If you want to batch add documents the process is the same as above however you need to select the tab batch document links. You can only do this if you are in a sample with a batch number. When you add a document to the batch document link this document will then be accessible from all samples that have the sample batch number



- Sample management

Book in/out and move

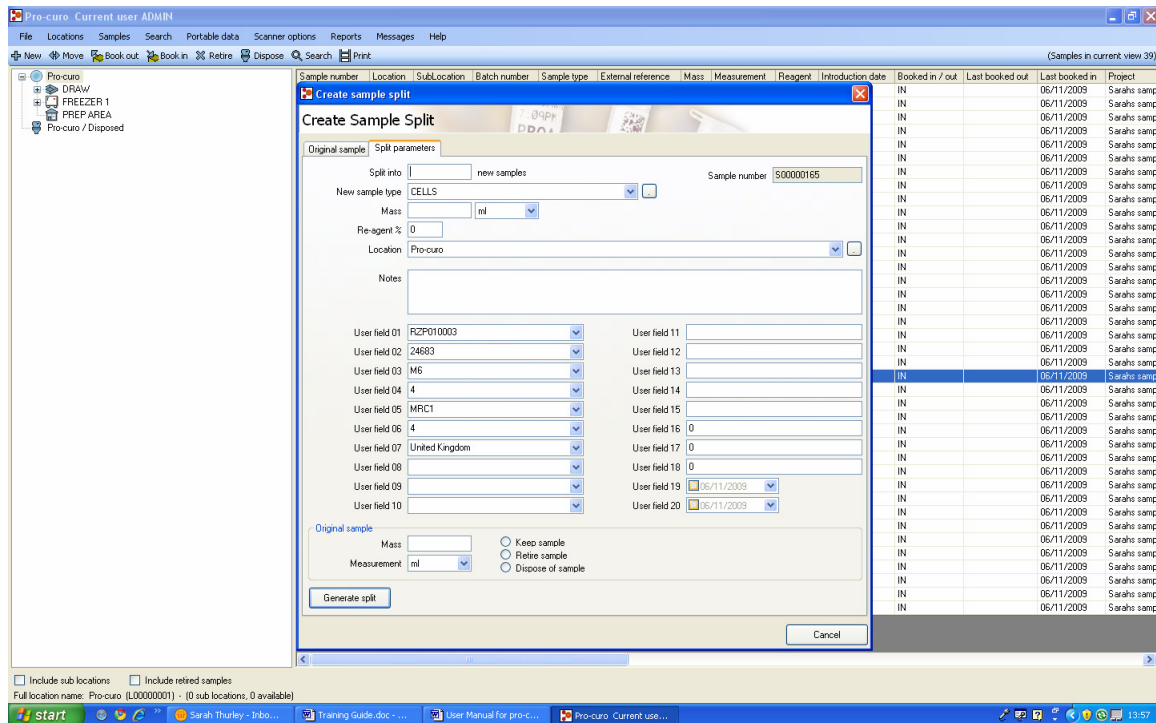
Once samples have been entered into the system, it is very quick and easy to book in/out the samples or move the samples through the system. The book in/out function allows you to highlight a sample or a range of samples [using standard Microsoft terms, hold down Ctrl and click the samples you want, or click the first sample, hold down Shift key and click the last sample, this will select all samples between the two] and click the book out button to signify that the samples have been temporarily removed from the

inventory system, [note the samples background color then changes from white to brown] then when the samples are returned to the inventory system you would highlight the sample or range of samples and click the book in button.

Moving samples is done just as easily, select a sample or range of samples click on the move button, this then brings up a location selection screen, where you select the new samples location, click OK and the samples are moved. [Its even possible to move whole locations, just click on the box, shelf or freezer and click move, its the same process as moving samples].

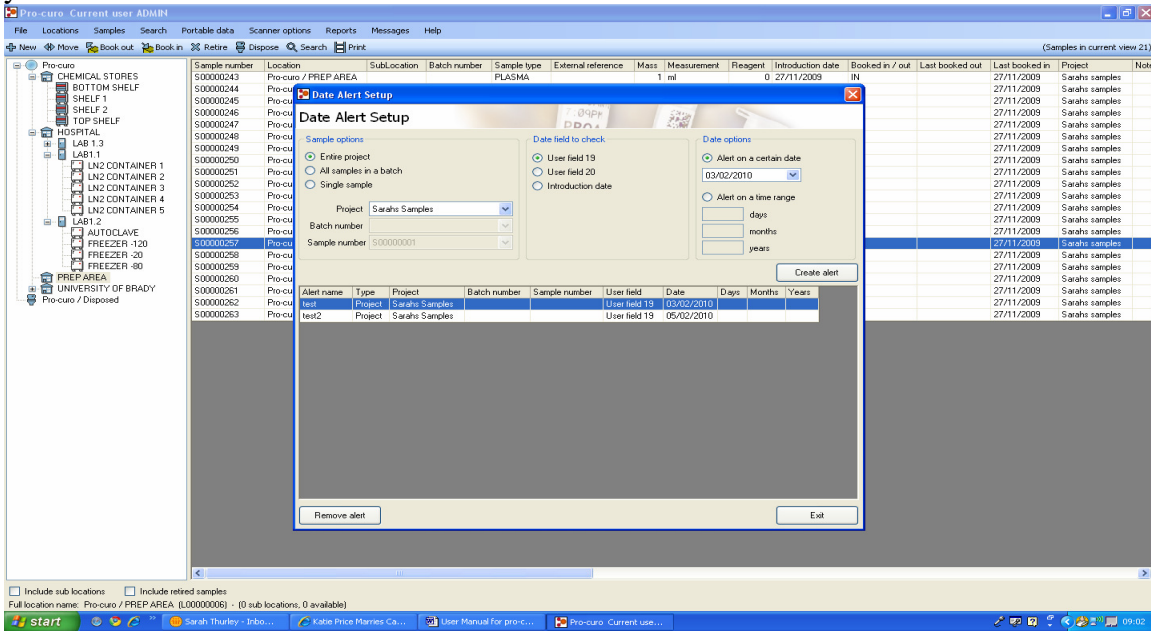
- **Split function**

At any point a sample can be “split” either due to processing or aliquoting what ever the reason the split function allows you to automatically create new samples from an exiting sample. During the split operation you decide how many new samples to create, what sample type the new samples will be and their individual mass, the system then creates the samples for you in a single operation [full parent child audit trails are recorded, see history section]. The function is particular time saving if for example you have a sample of whole blood that you wish to spin down into 25 samples of Plasma, or have a section of tissue that you wish to extract DNA etc from.

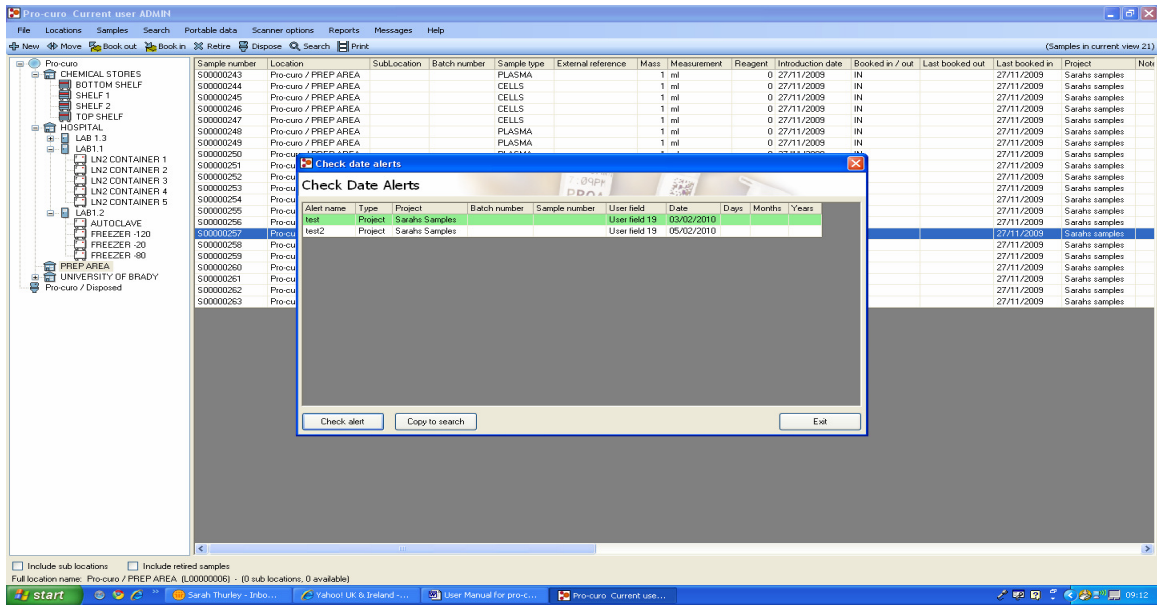


- Date alerts

Date alerts can be set up by going to file, admin and selecting date alerts. Once on the screen shown below you can select weather to have an individual alert or a group alert, you can select which date field you wish to run the alert on then finally the date at which you wish the date alert to occur on.



Once you have set up a date alert has been set up you can check on date alerts by going to samples, date alerts and then you can click on date alerts this will show the date alert groups that are now due to be brought to you attention in green as seen below



Disposal of a sample in Pro-curo

The power of a fully auditable system doesn't stop when a sample has been used and thrown away, ALL disposed samples are never deleted, instead they are moved to a disposed of location, where they can not be edited or changed but where the fully audit trail [history] can still be viewed. There is an extra warning within the system when you chose to dispose of a sample as it is permanent and can not be undone in any circumstance.

History of the sample

Perhaps the most important function within the Whole inventory system, each transaction performed within the system has a history record created detailing what the transaction was and when and by whom it was done. This feature provides a TOTAL audit trail for your samples. There is nothing that can be done within the system that does not have an associated history record.

ID	Sample number	Action type	Action	Technician	Date / Time
100	500000052	IMPORT	Sample imported from Excel Spread sheet. Project Swahili samples Sample type PLASMA Batch number External ref Mass T Measurement ml Reagent U Location Pro-curo Sub location	ADMIN	09/04/03/11/2009
141	500000052	Movement	Sample moved to Pro-curo / DRAW / BD01	ADMIN	09/16/03/11/2009
180	500000052	Movement	Sample moved to Pro-curo / DRAW / BD02 Sub location v.1 on portable by ADMIN 01/01/2004 09:13:29	ADMIN	09/30/03/11/2009
181	500000052	Movement	Sample moved to Pro-curo / DRAW / BD02 Sub location v.1 on portable by ADMIN 01/01/2004 09:13:29	ADMIN	09/30/03/11/2009
347	500000052	Book out	Sample booked OUT	ADMIN	13:58/06/11/2009
348	500000052	Book in	Sample booked IN	ADMIN	13:58/06/11/2009
349	500000052	Book out	Sample booked OUT	ADMIN	13:58/06/11/2009
350	500000052	Book in	Sample booked IN	ADMIN	13:58/06/11/2009

- Import / export

The system is designed with a data import function which enable sample information to be imported into the system via fixed structure Microsoft excel (*.xls) template. This function can be used as the initial import for sample data from an existing system or as a regular import of data from a sample collection site.

The first thing to do is to generate the import file template this is done by clicking the import /export spreadsheet button that can be found under the reports menu on the main toolbar area. Here you can chose to create a template will ALL pro-curo fields in [this includes your user definable fields] or to create the template with just the fields that you usually see on in the main and search view screen. The system will prompt you to give this import / export spreadsheet a name for reference purposes.

The data can be filled in when required and the template can be saved any number of times with a different filename and sent out to the various collection sites etc. When the spreadsheets have been filled in you can click on the import data tab on the same screen and chose to open a template file, once open you will see on screen the data that is proposed to be imported, once happy you click the import button. The system will begin a verification process to make sure that the data is suitable for importing, if the data needs to be modified a screen will be displayed to advise you of the specific rows and columns of data that need attention.

Once imported the system will automatically produce a unique Pro-curo reference for your sample and book it into the database [the history windows will show that the sample was imported into the system rather than entered manually].

