

Clinical Informatics System for Trials and Research



STAMS

Specimen Tracking and Management System

User Guide

CISTAR Operation Team

Revision Sheet

Release No.	Date	Revision Description
Rev. 0	9/01/2020	STAMS User's Guide for first cistar release.

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1 GENERAL INFORMATION

System Overview

Specimen Tracking and Management System (STAMS) is a web-based application built by NINDS Intramural IT, Information Management Section, for sample tracking and management solution for samples in a repository (tank) of a laboratory.

STAMS automatically assigns a unique identifier (barcode) to each sample and provides traceability and the ability to easily find the sample and its history.

STAMS is used primarily by researchers; it is suitable for anyone wanting to track samples in a laboratory. It is flexible enough to handle any number of different sample types. For each different sample type that you create, you can add fields to store the different information. Each sample type can be represented by unique image of your choice.

Every sample has an owner (or source), An owner or source of a sample is the entity on whose behalf you are storing the sample. This may be a patient, derived samples or anything you want to associate the samples with. As with sample types, you add the fields to hold the information that you want to keep like protocol number, volume, passage, etc.

STAMS provides full searching of samples using Sample Id, protocol number and other fields associated with sample. You can search and then export all the information into spreadsheet.

STAMS allows any repository to be replicated. As well as showing you the path to where containers are stored, it also shows you where exactly in a certain container specific samples are. STAMS allows containers of any shape (box, circular or Pie configuration) and size to be replicated and also allow the user to custom build the container for the needs.

STAMS incorporates advanced functionality such as bar-coding, barcode reading, import/export and much more.

Points of Contact

STAMS team may be contacted at cimssupport@mail.nih.gov for installation, technical issues or any other trouble shooting.

Help Desk

The NIH help desk website can be accessed at <http://itservicesdesk.nih.gov/support/> (assign tickets to NINDS_CIMS_SUPPORT) for any emergency assistance.

2 SYSTEM SUMMARY

STAMS is a web-based application and is accessible directly through the CiSTAR platform. This system is used for tracking and managing the specimen stored in the labs. STAMS have various roles (Principal Investigator, Lab User, Lab Admin & System Admin) and privileges based on the roles and privileges the accessibility of samples and various features of the application are controlled. The information related to samples is entered using the web user interface; the system assigns a unique id for the sample stored in the database. This id is utilized to generate the barcode, which can be printed using the barcode printer on the label. The label is struck on the vial and stored in the box/container/freezer. The barcode reader is used scan the barcode; the system will automatically pull the sample information on the screen based on the input from barcode reader.

System Configuration

STAMS is web-based application.. The user will also need the barcode printer and barcode reader to print the label or lookup the sample while retrieving the sample from the repository.

User Access Levels

STAMS have various roles and privileges to control accessibility the system and samples stored in the repository. Below are the roles in STAMS application

1. Lab User (LU): The LU can access the protocols and sample to which the PI has provided access. Lab user can add patient/source and enroll them into a protocol.
2. Lab Admin (LA): The LA can add Sources, Printers, Repository, Box Types and Cell Types to the system
3. System Admin (SA): The SA has all the privileges of LA plus access to all the protocols of the lab and add/edit users into the system.

3 GETTING STARTED

3.1 How to login to CiSTAR

In order to access STAMS, the user must login to the CISTAR platform using the following website address. [https:// https://cistar.ninds.nih.gov/](https://cistar.ninds.nih.gov/)

CiSTAR
Clinical Informatics System for Trials and Research

Enter your Username and Password

Username:

Password:

clear

[Request A New Account](#) | [Forgot your username?](#) | [Forgot your password?](#)

For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

Warning Notice

This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

All information this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

Clinical Informatics System for Trials and Research (CISTAR) System

National Institutes of Health
Center for Information Technology
Website: <http://cit.nih.gov>

National Institutes of Health
National Institute of Neurological Disorders & Stroke
Website: <http://www.ninds.nih.gov>

NIH
Center for Information Technology

NIH
National Institute of Neurological Disorders and Stroke

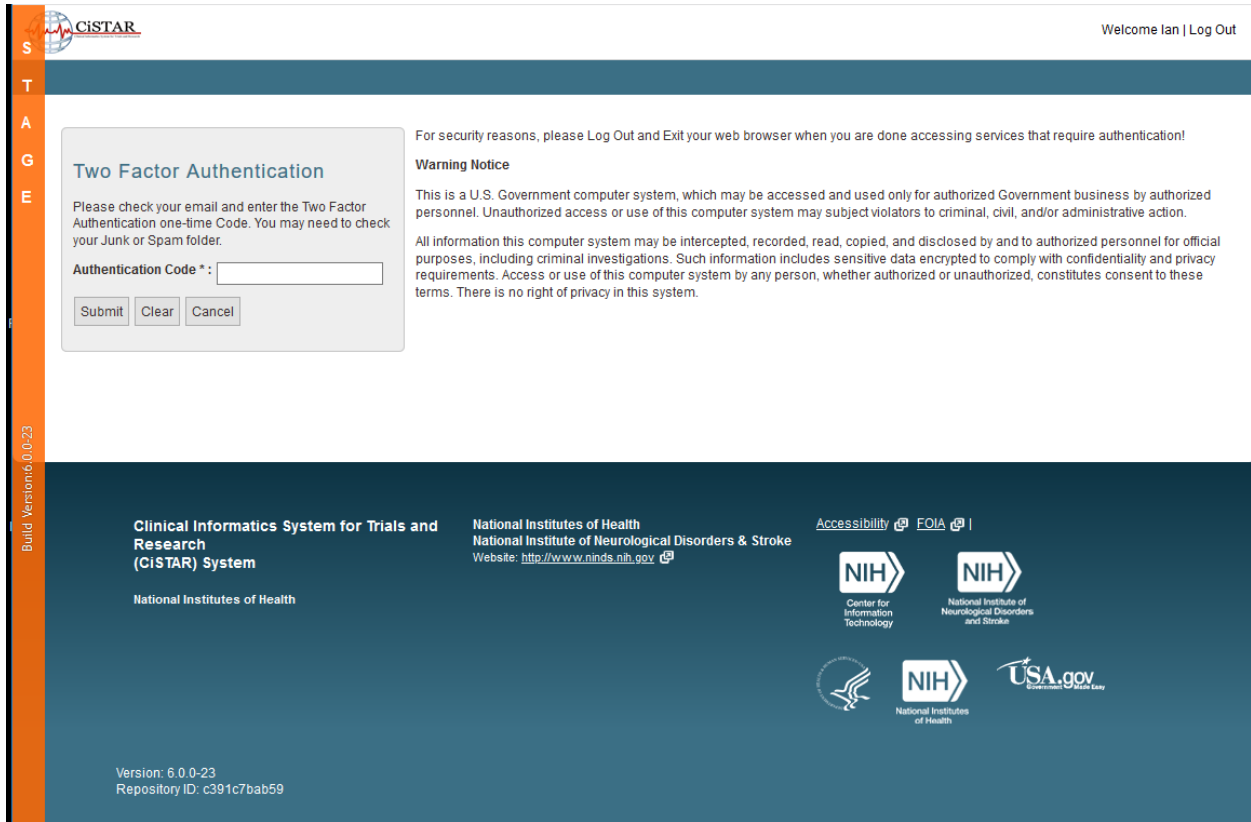
NIH
National Institutes of Health

USA.gov
Department of Health and Human Services

Build Version:

The user will provide their username and password and click on “LOGIN” button.

3.1.2. Two Factor Authentication



After logging in, the “Two Factor Authentication” page will be open.

The user will receive an email from “DCB BRICS”. The user has to copy/paste the one-time code and click on the “Submit” button.

An example of Two Factor Autothentication Code email from DCB BRICS:

Two Factor Authentication Code :- CISTAR - STAGE



Hello,

This email is to inform you that your Two Factor Authentication one-time Code is 88146; this code will expire in 10 minutes.

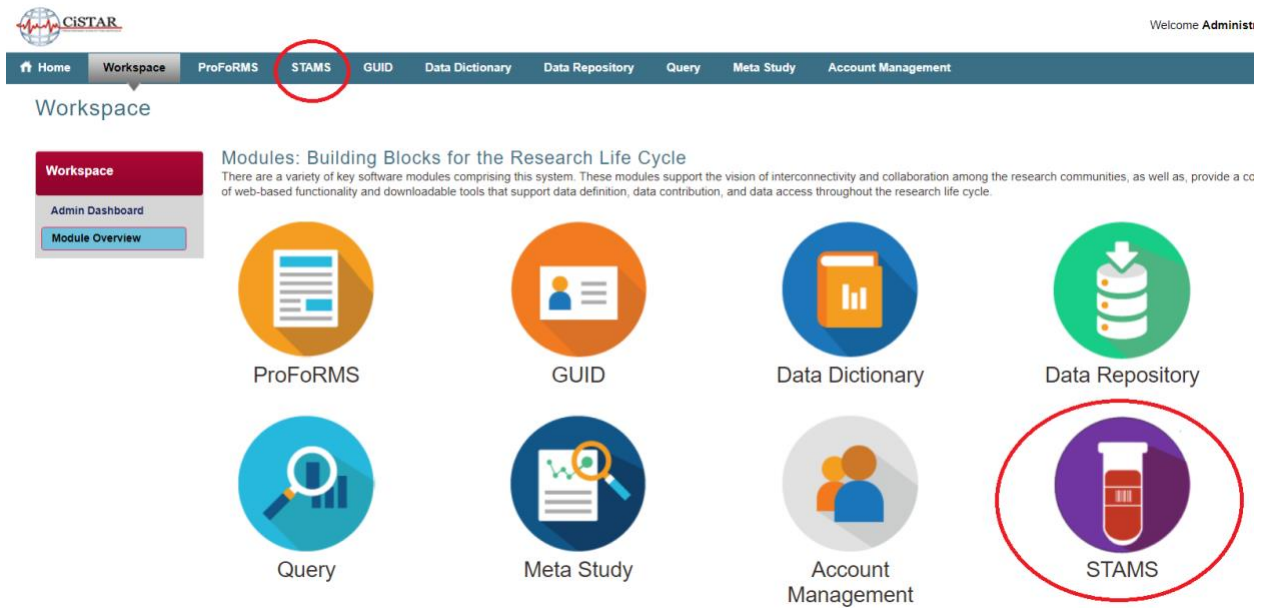
Please do not respond to this email as this mailbox is unmonitored, direct any questions to dcbbrics@nih.gov.

Thank you,
CISTAR Operations at NIH/CIT

3.1.3 STAMS System Home Page

After passing the “Two Factor Authentication”, the “Workspace” page is open.

The user clicks on “STAMS” image or clicks on “STAMS” tab to go into the STAMS system.





Welcome Administrator, Ian | Log Out

Navigation: Home | Workspace | ProFoRMS | **STAMS** | GUID | Data Dictionary | Data Repository | Query | Meta Study | Account Management

Manage Repositories
Specimen Tracking & Management

My Repositories | Configure Repository | Manage Subjects | Reports | Site Administration

Select a repository to track and maintain samples.

Add Edit Delete Search: []

Name	Description
<input type="checkbox"/> Animal Repository	Animal Repository
<input type="checkbox"/> First Repository	In Stage
<input type="checkbox"/> First Test Repository 1	First Test Repository 1
<input type="checkbox"/> normal repository	normal repository
<input type="checkbox"/> Test-BioRepository	Test- BioRepository
<input type="checkbox"/> TNS- Test human Brain TNS- Test human BrainTN@-	TNS- Test human Brain TNS- Test human BrainTNS- Test human BrainTNS- Test human BrainTNS- Test hu@

Showing 1 to 6 of 6 entries (0 row selected of 6) First Previous 1 Next Last

Clinical Informatics System for Trials and Research (CiSTAR) System
National Institutes of Health
National Institute of Neurological Disorders & Stroke
Website: <http://www.ninds.nih.gov>

NIH Center for Information Technology | NIH National Institute of Neurological Disorders and Stroke | USA.gov

Enter your Username and Password

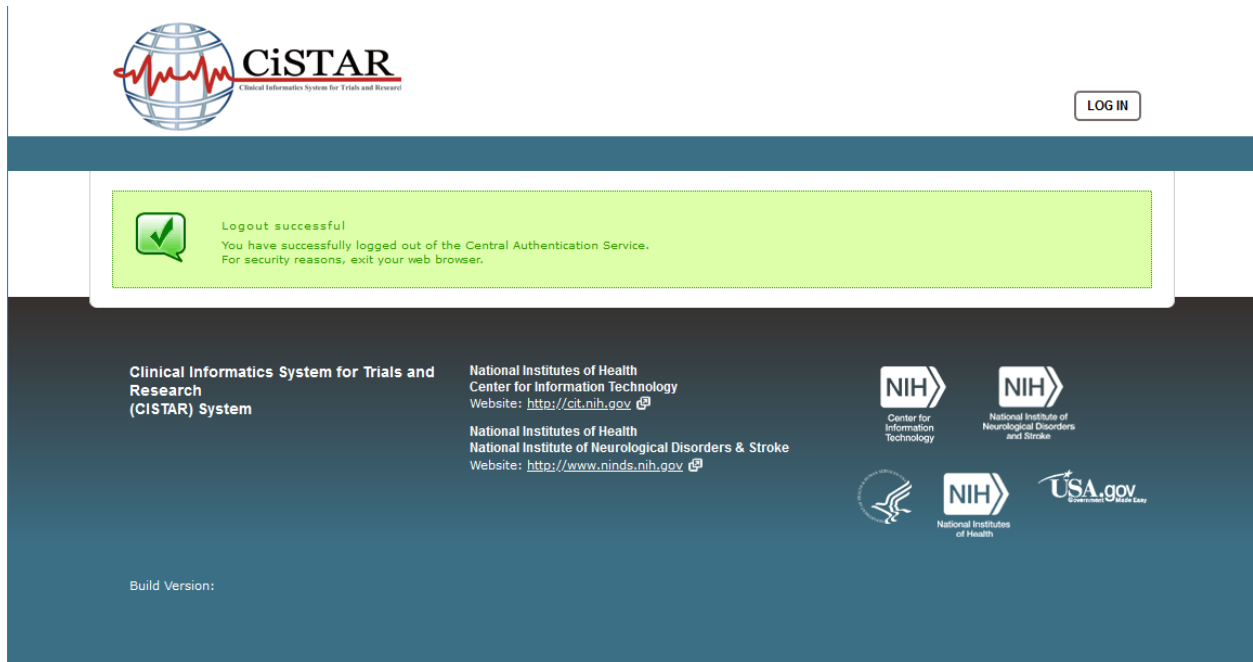
[Request A New Account](#) | [Forgot your username?](#) | [Forgot your password?](#)

3.3 Exit System

To exit the application, click on “Log Out” link at right top corner of the user interface.



The system will display the below page



4 USING THE SYSTEM

Following are the list of features, functions and different UI constructs of the STAMS system. Each of them are further described in subsections

4.1 Home Page

STAMS homepage contains the following features for all roles

- Username and current role are displayed on the top of the page.
- The left navigation bar contains the following menu items

Manage Repository, Configure Repository, Manage Subjects, Reports, and Site Administration.

Select a repository by clicking on the name of the Repository to track and maintain samples.



Welcome Administrator, Ian | Log Out

Home Workspace ProFoRMS **STAMS** GUID Data Dictionary Data Repository Query Meta Study Account Management

Manage Repositories STAMS Specimen Tracking & Management

My Repositories Select a Repository

Configure Repository Select a repository to track and maintain samples.

Manage Subjects Add Edit Delete Search:

Reports

Site Administration

Name	Description
<input type="checkbox"/> Animal Repository	Animal Repository
<input type="checkbox"/> First Repository	In Stage
<input type="checkbox"/> First Test Repository 1	First Test Repository 1
<input type="checkbox"/> normal repository	normal repository
<input type="checkbox"/> Test-BioRepository	Test- BioRepository
<input type="checkbox"/> TNS- Test human Brain TNS- Test human BrainTN@-	TNS- Test human Brain TNS- Test human BrainTNS- Test human BrainTNS- Test human BrainTNS- Test hu@

Showing 1 to 6 of 6 entries (0 row selected of 6) First Previous 1 Next Last

Clinical Informatics System for Trials and Research (CiSTAR) System National Institutes of Health National Institute of Neurological Disorders & Stroke Website: <http://www.ninds.nih.gov> Accessibility | FOIA

National Institutes of Health

NIH Center for Information Technology NIH National Institute of Neurological Disorders and Stroke USA.gov

4.2 Add/Edit/Delete a Repository

4.2.1 Adda Repository

To add a Repository in the STAMS system, click on “Add” and enter the name and description of the Repository.

STAMS

Specimen Tracking & Management

Select a Repository

Select a repository to track and maintain samples.

Search:

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Animal Repository	Animal Repository
<input type="checkbox"/>	First Repository	In Stage
<input type="checkbox"/>	First Test Repository 1	First Test Repository 1
<input type="checkbox"/>	Human Brain Repository	Human Brain Repository
<input type="checkbox"/>	normal repository	normal repository
<input type="checkbox"/>	Test-BioRepository	Test- BioRepository
<input type="checkbox"/>	TNS- Test human Brain TNS- Test human BrainTN@-	TNS- Test human Brain TNS- Test human BrainTNS- Test human BrainTNS- Test human BrainTNS- Test hu@

Showing 1 to 7 of 7 entries (0 row selected of 7) First Previous **1** Next Last



Welcome Administrator, Ian | Log Out

Home Workspace ProFoRMS **STAMS** GUID Data Dictionary Data Repository Query Meta Study Account Management

Switch Box

Manage Repositories

My Repositories

Configure Repository

Manage Subjects

Reports

Site Administration

STAMS

Repository Information

Repository Information

Name*

Description

Edit a Repository

To change the name or description of a Repository, select the Repository and click on “Edit”

Delete a Repository

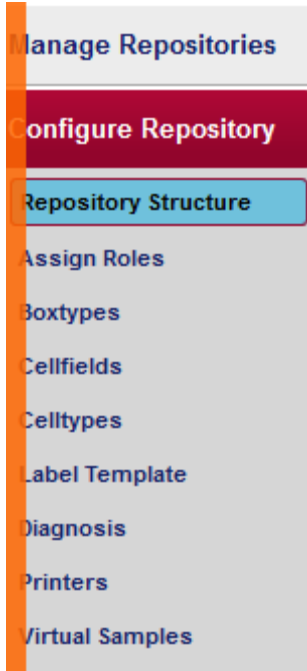
To delete a Repository, select the Repository and click on “Delete”

4.2.2 Access to Repository

4.2.2.1. Configure Repository

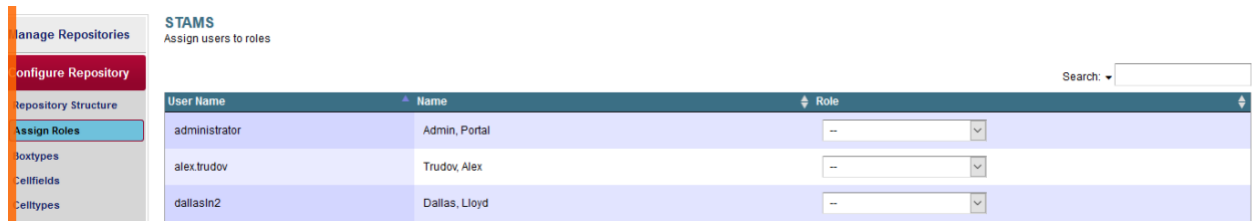
In order to access the features under Configure Repository menu, the user needs the “Configure Repository” privilege. To give a user ‘Configure Repository’ privilege, go to “Site Administration” then “Roles & Privileges” and select “Configure Repository”

Under the “Configure Repository” menu the following features are available : Assign Roles, Boxtypes, Cellfields, Celltypes, Label Template, Diagnosis, Printers, Virtual Samples.



4.2.2.2. Assign Roles

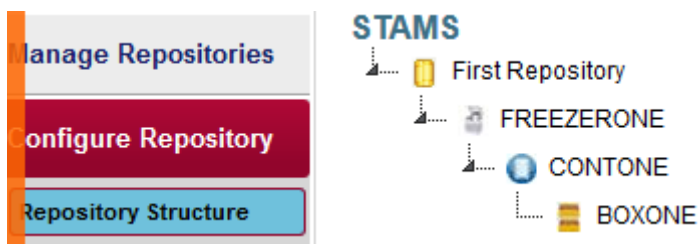
To add user to repository, click on “Assign Roles” link from left menu:



Select any role through the “Role” dropdown following the username and “Save”. The user will be able to access the repository.

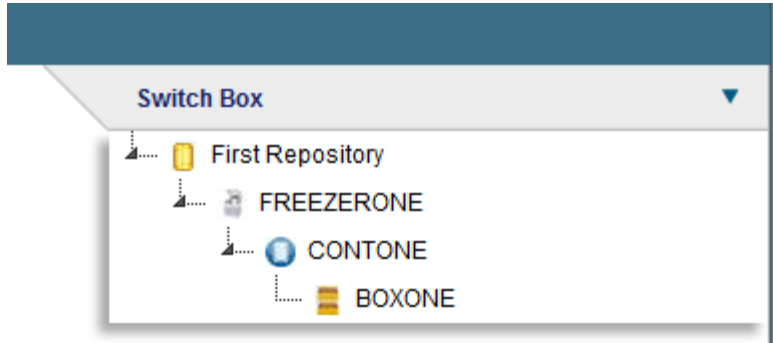
4.2.3 Access the repository menu tree

Click on the “Repository Structure” left menu



4.2.3.2 Switch Box shortcut.

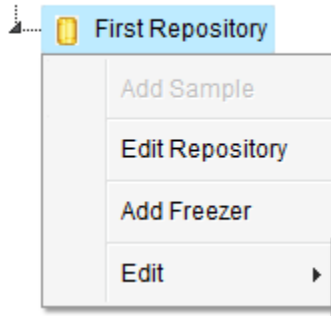
Click on "Switch Box" at right top of the user interface.



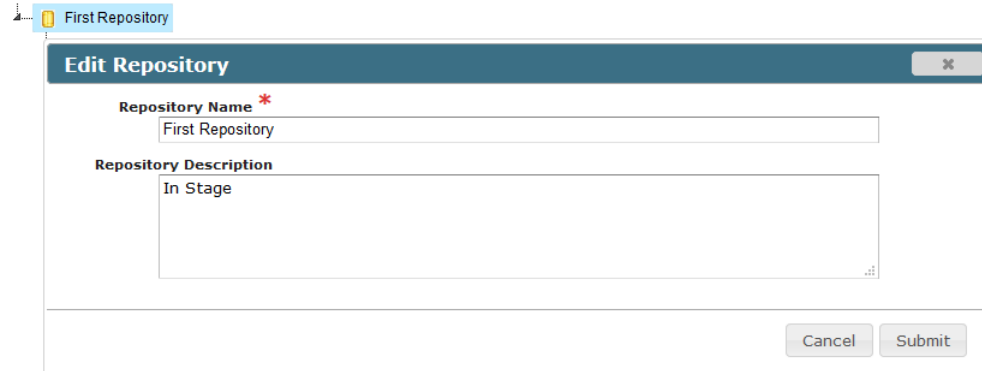
4.2.4 Modify a Repository

Right click on the repository to "Edit Repository"

STAMS



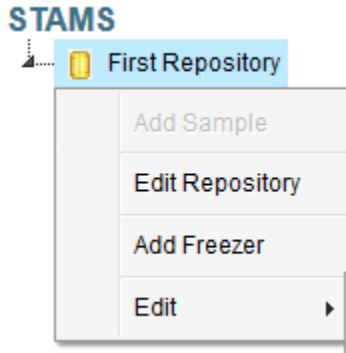
STAMS



4.3 Add/Modify/Delete a Freezer

4.3.1 Add a Freezer to a Repository

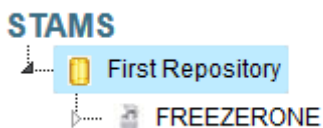
To add a Freezer to repository, select “Add Freezer” in the right click context menu on a repository



System displays a text field to enter name for the new Freezer as in below picture. Enter the name of the Freezer and click enter to save the new name.

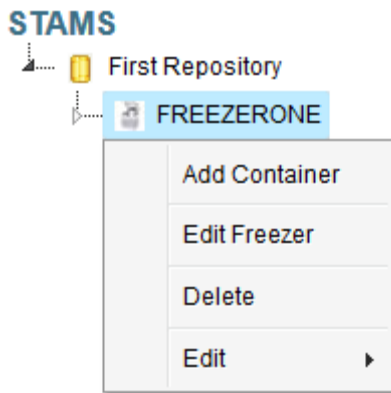


New freezer will be added the repository as shown in the menu tree below.



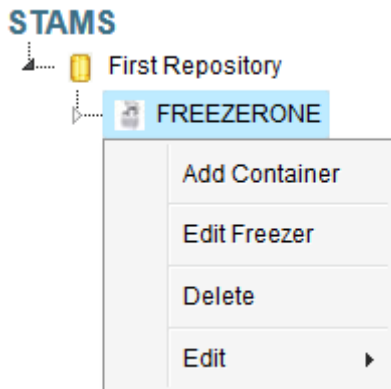
4.3.2 Modify a Freezer

Following actions are available to perform on a Freezer on right click on the freezer name : Add Container, Edit Freezer, Delete, and Edit.



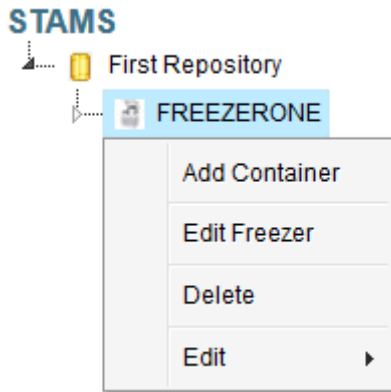
4.3.3 Add Container to a Freezer

Refer to section 4.4.



4.3.4 Delete a Freezer

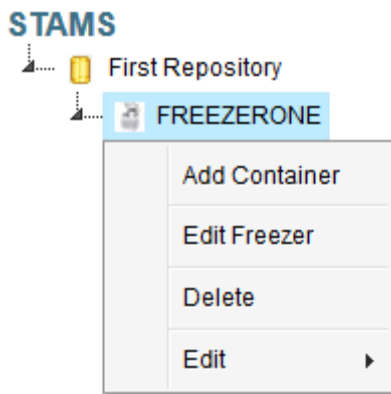
To delete a Freezer, right click on the freezer name and select "Delete" . It deletes the Freezer from the system.



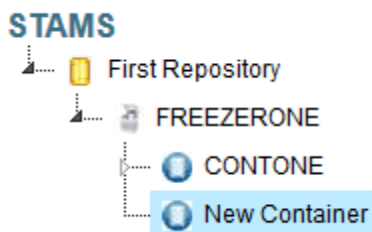
4.4 Add/Delete a Container

4.4.1 Add a Container to a Freezer

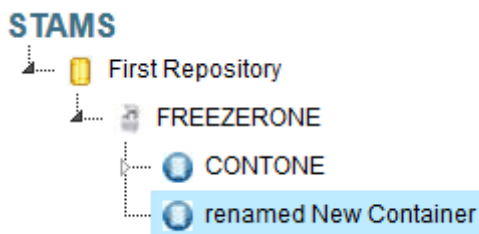
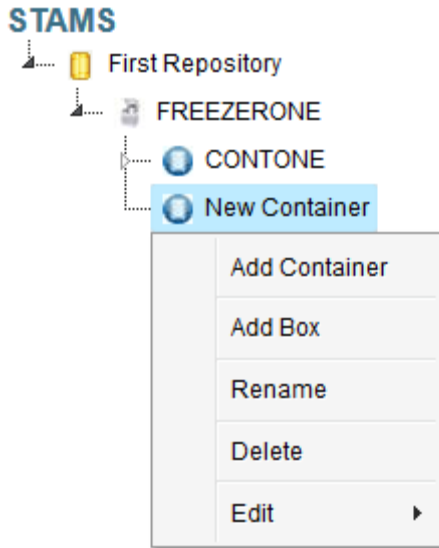
To add a Container to a Freezer, select “Add Container” in the right click context menu, the system will display the pop-up window as shown below.



the “New Container” is created as in below.

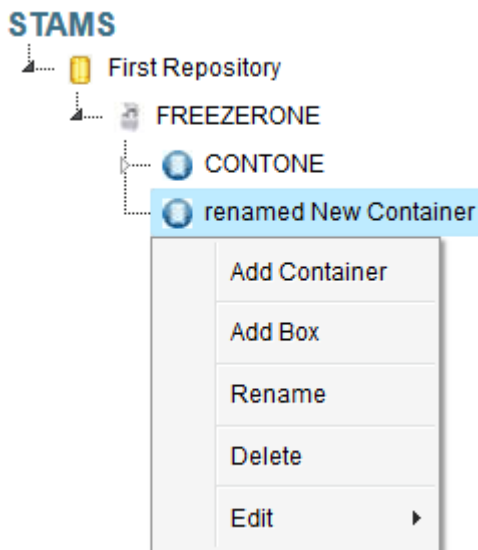


Right-click on the “New Container” and click on “Rename” to give it a new name.



4.4.2 Actions on a Container

Five actions can be performed to a Container: Add Container, Add Box, Rename, Delete, and Edit.



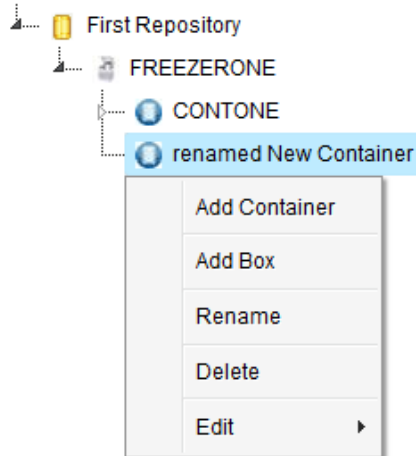
4.4.2.1 Add Container

A Container can have another containers within it.

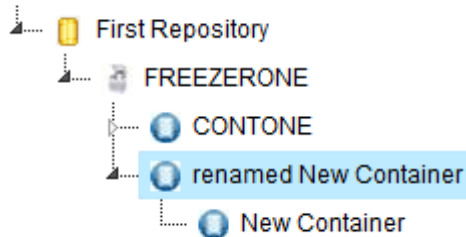
Click "Add Container" on a Container, a new container will be added.

User can rename the newly created container b.

STAMS

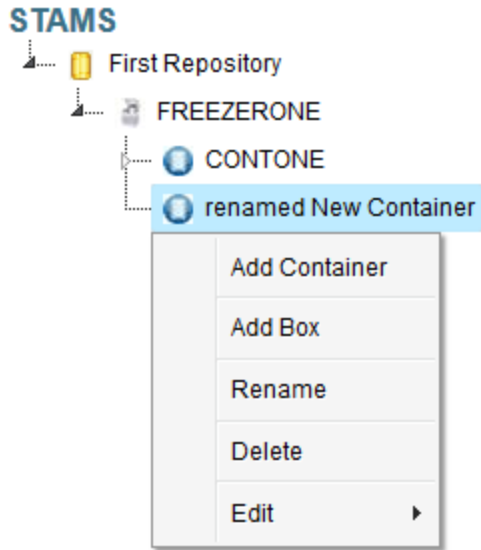


STAMS



4.4.2.2 Rename Container

To rename a new container, right click on the container and click on 'Rename'. Enter the modified name and click enter to save the new name.

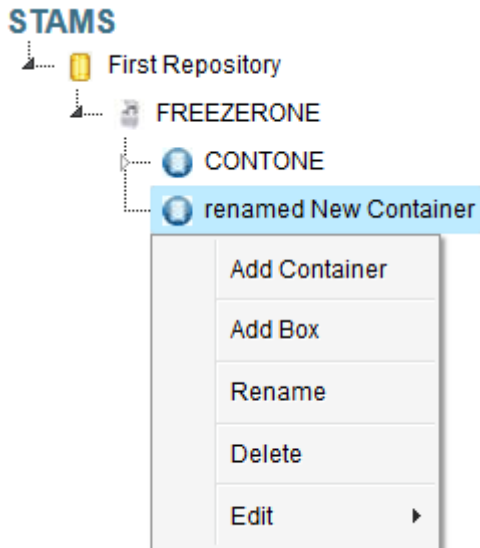


4.4.2.3 Add Box

Refer to section 4.5

4.4.2.4 Delete Container

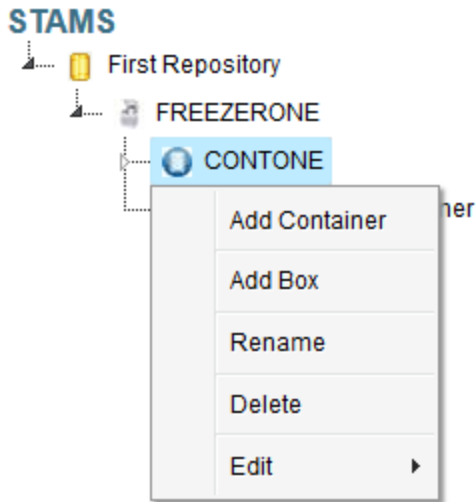
To delete a Container, right click on the container name and select “Delete” . It deletes the Container from the system.



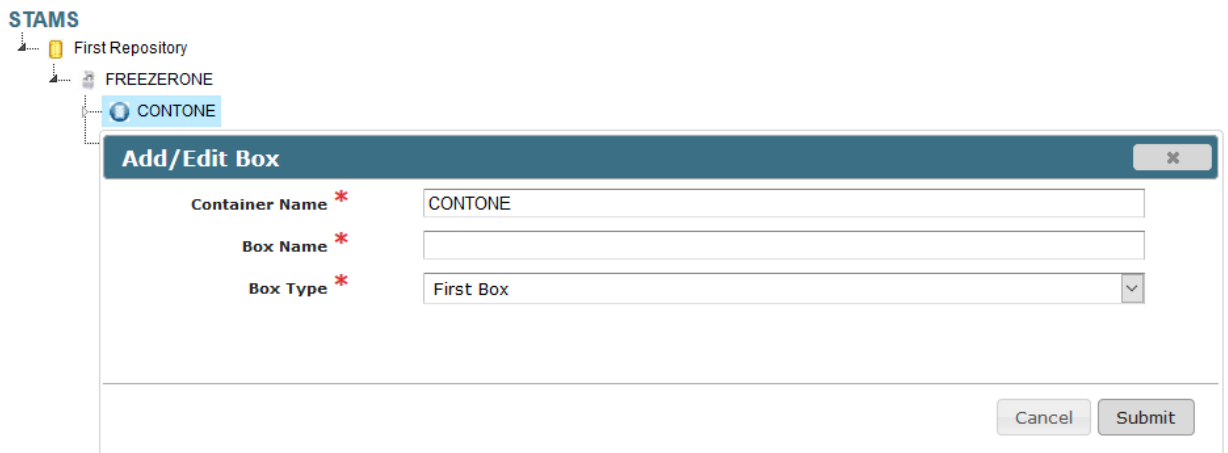
4.5 Add a Box to a Container

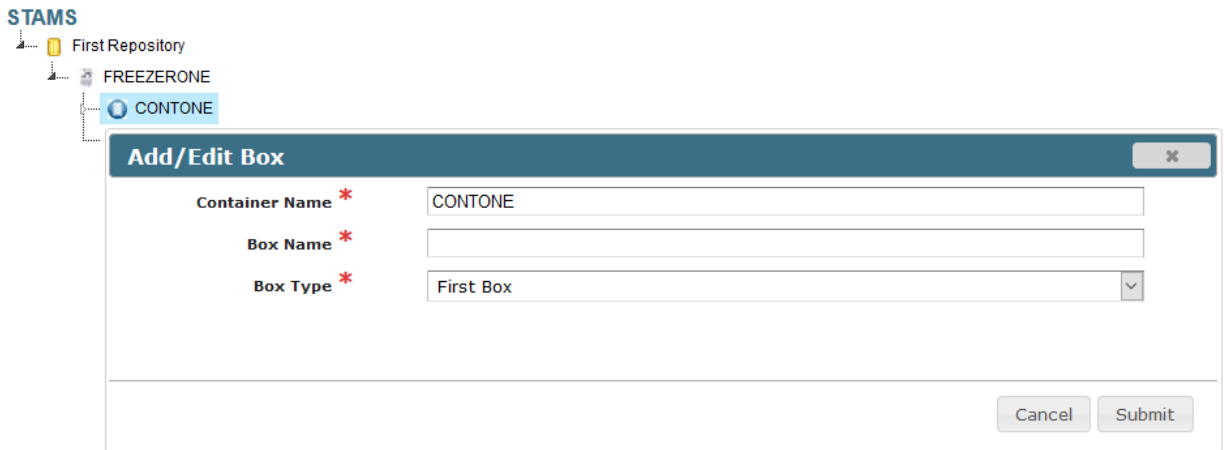
Note: In order to add 'New boxes', the 'Box types' have to be defined in the system. Refer to section 4.5.2 and 4.5.2.1 on how to define Box Types in the system.

To add a box to the Container, select "Add Box" in the right click context menu of a Container

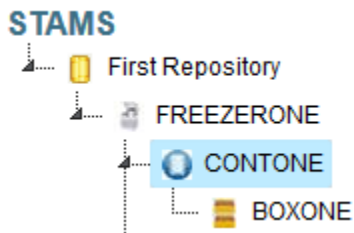


System will display the pop-up window as shown below.



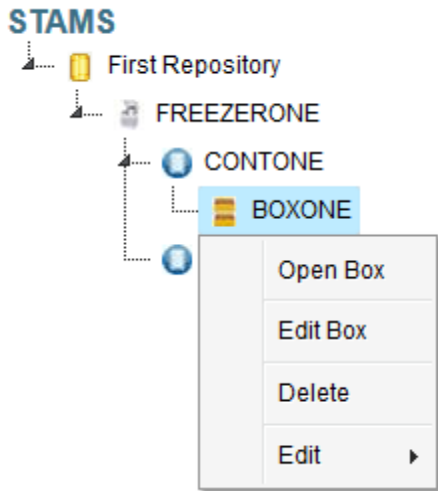


Enter the Box name and select “Submit” button to add a Box to the selected Container, new Box will be added to the Container as shown in the menu tree below.



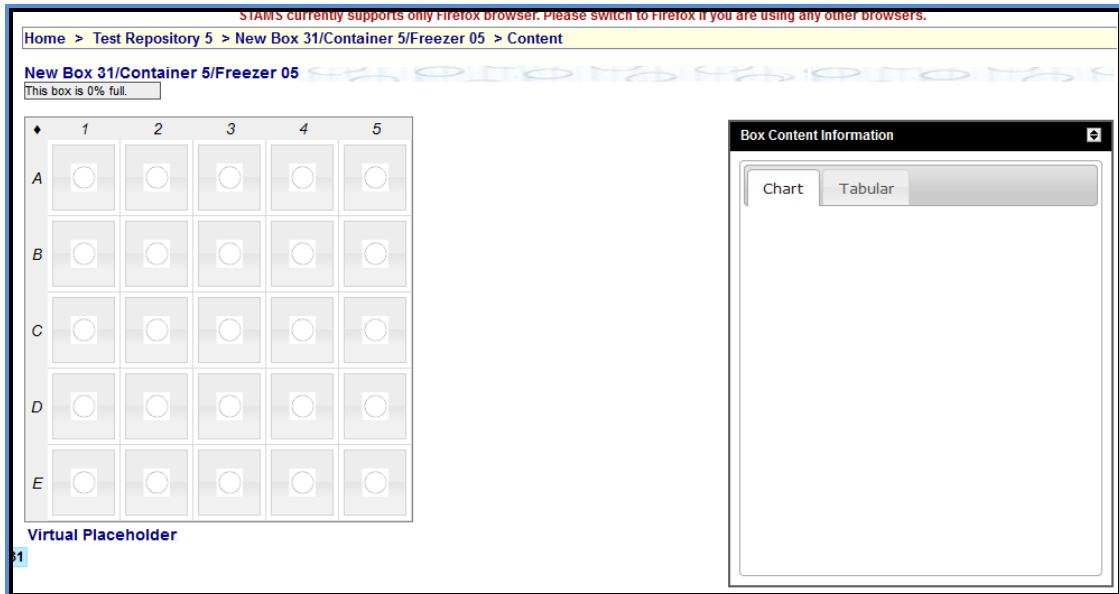
4.5.1 Open/Modify/Delete a Box

The following actions are available to perform on a Box: Open Box, Edit Box, Delete, and Edit.



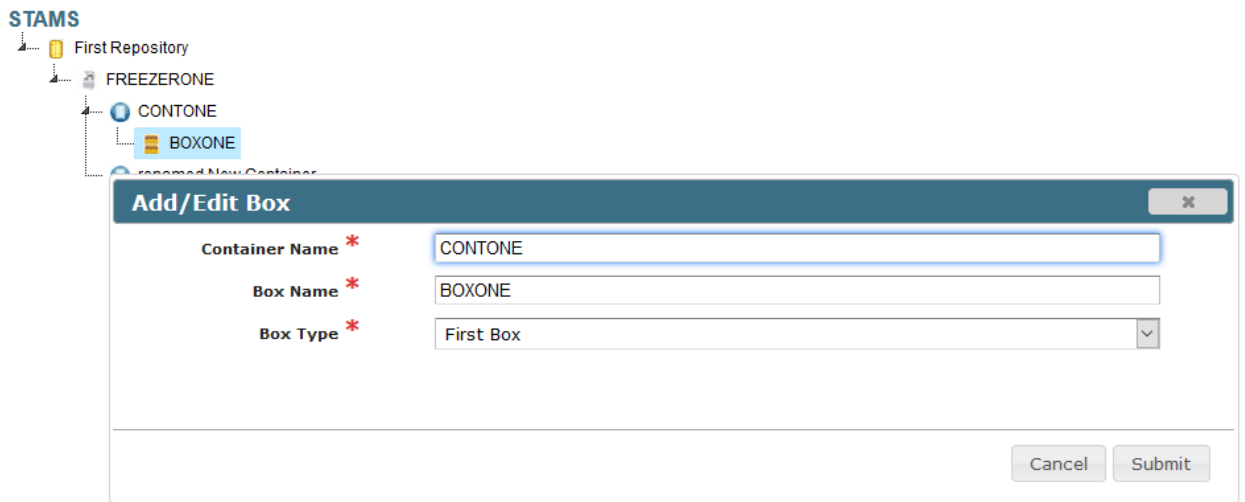
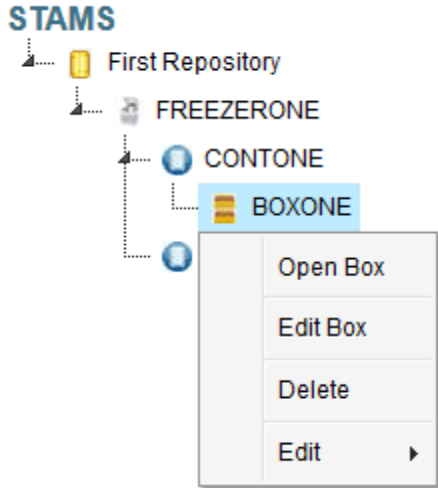
4.5.1.1 Open Box

This menu action will display the box information as shown below



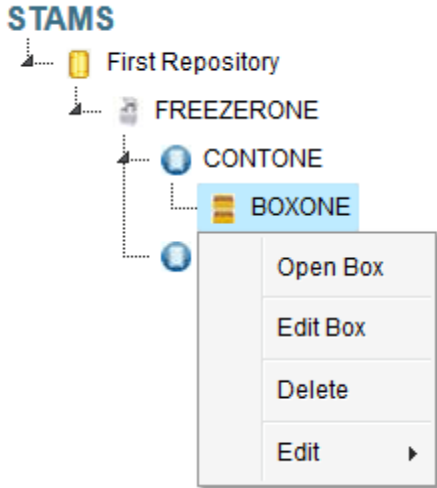
4.5.1.2 Edit a box

To edit the Box as shown below. When this menu is selected, UI allows user to edit the Box and to save the Box.



4.5.1.3 Delete a Box

To delete a Box, right click on it and select the “Delete” button. It deletes the Box from the system



4.5.2 Add a Box Type.

To define/add a “Box Type” in the system, user should be assigned to one of “System Admin” & “Lab Admin” roles.

On the left menu, click on a “Boxtypes” sub menu under “Configure Repository” menu.

A table is displayed where the user can “Add” a Box Type by clicking on “Add” button.



4.5.2.1 Add a Box Type Details:

Enter the following information to add a Box Type:

“Name” – Name of the “Box Type”

“Coordinated” or “Non-coordinated” radio buttons –

Display “Coordinate” –

Four options are available in this drop down. A selection indicates the Row & Column header names format either as Number and/or Alpha combination. This is a flexible feature to suffice the needs of a Lab.

Row & Column text boxes – System allows specifying the number of rows and columns to the “Box Type” table. This feature allows user to control the table size and display.

STAMS

[] Box Type information

Name * First Box

Layout * Coordinated Non-Coordinated (user-organized)

Display Coordinate * A,1

Rows * 10

Columns * 10

Type * Default

Box Grid *

	A	B	C	D	E	F	G	H	I	J
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Reset Cancel

After entering/selecting above information, click “Save” button to save the Box Type or “Cancel” to cancel the operation. A table is displayed for all boxes created for a Container

STAMS

My Box Types

Select a box type to view or perform an action.

Add Edit Delete

Search:

Name	Rows	Columns	Type	Display Coordinate
<input type="checkbox"/> First Box	10	10	Default	A,1

Showing 1 to 1 of 1 entries (0 row selected of 1)

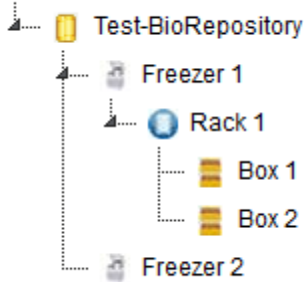
First Previous 1 Next Last

4.6 Organizing Repository/ organizing the tree structure:

The system organizes and arranges items (boxes, freezers, and containers) in an alphabetical order based on the title of the freezers, containers, and boxes,.

System will automatically sort the values for freezer/container/ box names in ascending or descending order.

STAMS



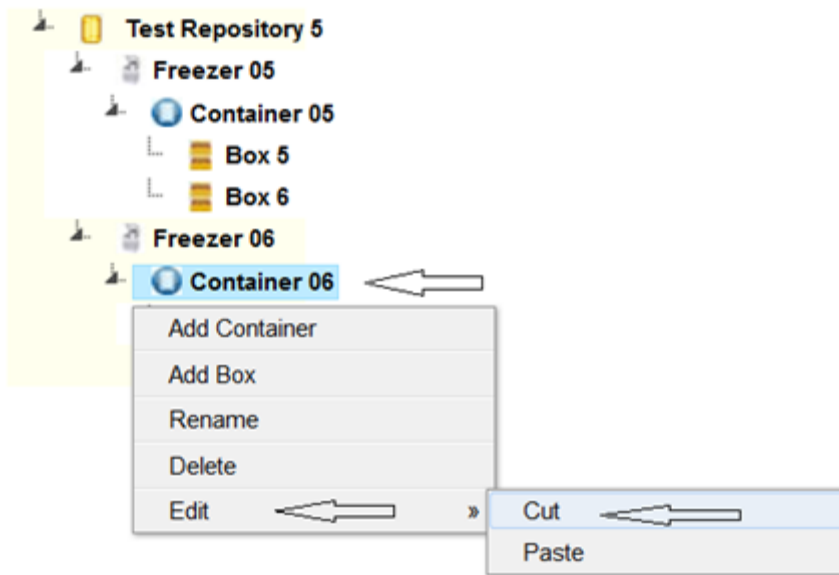
4.7 Move boxes to different containers and containers to different freezers:

4.7.1 Move containers to different freezer:

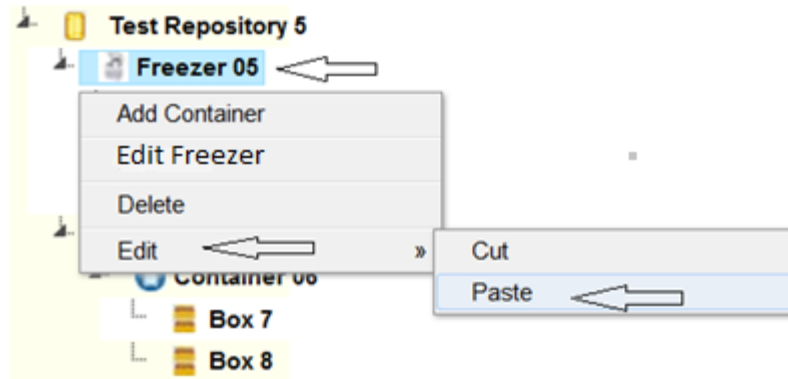
To move containers to different freezer, follow the steps below and see the examples:

(In order to move container from Freezer 06 to Freezer 05:

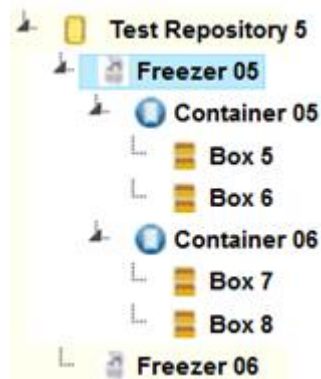
Step 1: Right click on the container (Container 06) under the freezer (Freezer 06) to see “Edit” button. “Cut” and “Paste” options will be displayed after hover on “Edit” button. Click on “Cut” button to move the container to different freezer.



Step 2: Right click on different freezer (Freezer 05) to see “Edit” button. “Cut” and “Paste” options will be displayed after hover on “Edit” button. Click on “Paste” button to move the container (container 06) to different freezer (Freezer 05).



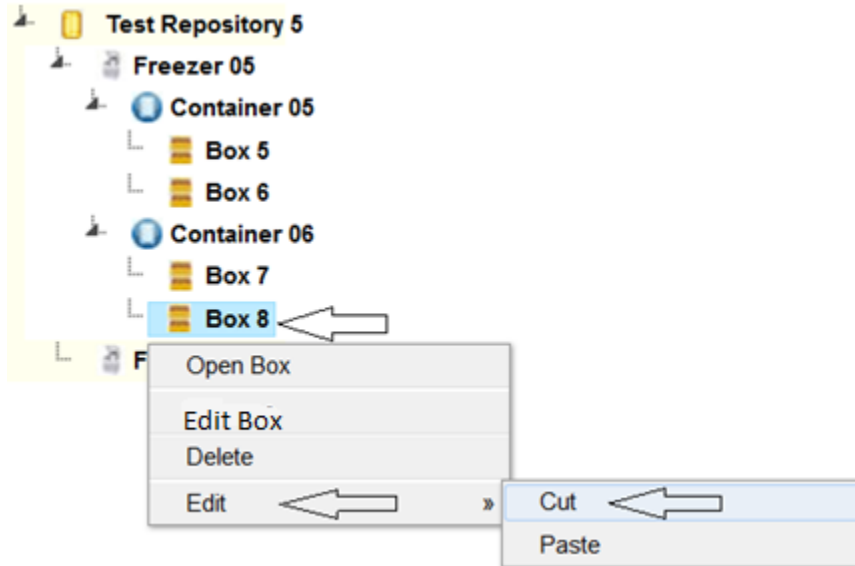
Step 3: The container will be moved to the different freezer like below (container 06 from Freezer 06 to Freezer 05).



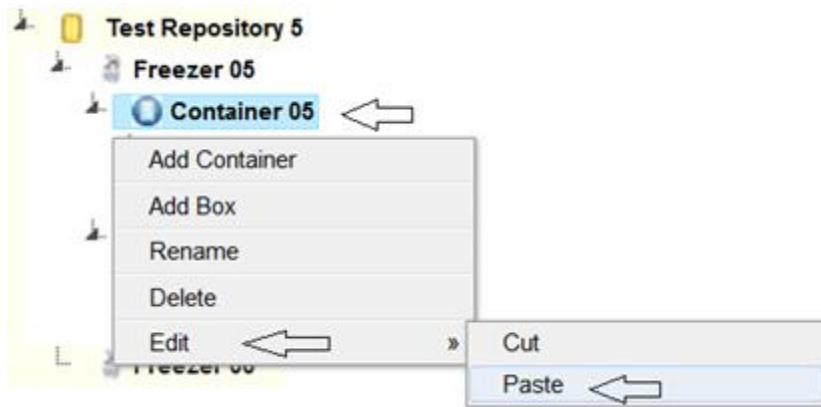
4.7.2 Move boxes to different containers:

To move boxes from one container to different container: Follow below steps and see examples:

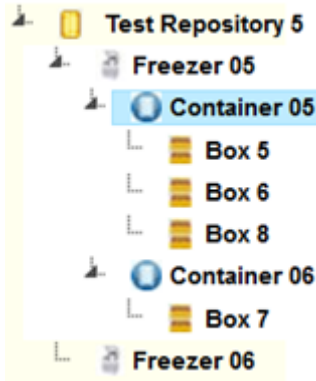
Step 1: In order to move boxes from one container to another, right click on the Box to see “Edit” button. “Cut” and “Paste” options will be displayed after hover on “Edit” button. Click on “Cut” button to move the Box to different container. (For example, Box 8 under Container 06)



Step 2: Right click on container (container 05) to see “Edit” button. “Cut” and “Paste” options will be displayed after hover on “Edit” button. Click on “Paste” button to move the Box 8 to different container as shown below.



Step 3: The Box will be moved to the different container like below (from container 06 to container 05):



4.8 Add/Modify/Delete Cell Types

Cell Type

To define/add a “Cell Type” in the system, user should be assigned to one of “System Admin” & “Lab Admin” roles. Go to left menu, click on “Celltypes” sub menu under “Configure Repository” menu.

A table is displayed where the user can add a “Cell Type” with clicking on “Add” button.

The screenshot shows the 'STAMS My Cell Types' interface. On the left is a navigation menu with 'Configure Repository' highlighted. The main area has a search bar and 'Add', 'Edit', and 'Delete' buttons. Below is a table with the following data:

Icon	Name	Description	Unit	Cryo Solution	Note	Parent
	DNA		mL			Whole Blood
	Plasma		mL			Whole Blood
	Serum		mL			Whole Blood
	Whole Blood		mL			

At the bottom, it says 'Showing 1 to 4 of 4 entries (0 row selected of 4)' and has navigation buttons: 'First', 'Previous', '1', 'Next', 'Last'.

4.8.1 Add New Cell Type

Enter the following information to add a Cell Type and click “Save” button to save the Cell type or click “Cancel” button to cancel the operation.


Cell Icon– Click on any Cell Icon (required).

Cell Name: Cell name is mandatory (required).

Description: Enter the description of the cell
Cryo solution: Other/ 30% BSA + CRYOSOLUTION (1.1)/FCS+DMSO+MEM
Note: Additional notes related to the cell type

STAMS

[+] Cell Type information



Name*

Description

Unit

Cryo Solution

Parent

Note





The new cell type will appear in the table as shown below.

STAMS

My Cell Types

Select a cell type to view or perform an action.

Search:

<input type="checkbox"/>	Icon	Name	Description	Unit	Cryo Solution	Note	Parent
<input type="checkbox"/>		DNA		mL			Whole Blood
<input type="checkbox"/>		Plasma		mL			Whole Blood
<input type="checkbox"/>		Serum		mL			Whole Blood
<input type="checkbox"/>		Whole Blood		mL			

Showing 1 to 4 of 4 entries (0 row selected of 4) First Previous **1** Next Last

4.8.2 Edit cell type information





To edit a cell type, check on cell type and click on "Edit" button.

STAMS

My Cell Types

Select a cell type to view or perform an action.

Search:


Icon	Name	Description	Unit	Cryo Solution	Note	Parent
<input checked="" type="checkbox"/> 	DNA		mL			Whole Blood
<input type="checkbox"/> 	Plasma		mL			Whole Blood
<input type="checkbox"/> 	Serum		mL			Whole Blood
<input type="checkbox"/> 	Whole Blood		mL			


Showing 1 to 4 of 4 entries (1 row selected of 4) First Previous **1** Next Last

The system will pop up the below window. Select a cell icon (required), enter the name (required), other fields and select the image to represent cell type and click on the “Save” button to update the Cell Type.

STAMS

[] Cell Type information





Name*

Description

Unit

Cryo Solution

Parent

Note

4.8.3 Delete cell type from the system





To delete a “Cell Type”, check on cell type and click on “Delete” button to delete “Cell Type” from the system.

STAMS

My Cell Types

Select a cell type to view or perform an action.

Add Edit Delete Search:

Icon	Name	Description	Unit	Cryo Solution	Note	Parent
<input checked="" type="checkbox"/>	 DNA		mL			Whole Blood
<input type="checkbox"/>	 Plasma		mL			Whole Blood
<input type="checkbox"/>	 Serum		mL			Whole Blood
<input type="checkbox"/>	 Whole Blood		mL			

Showing 1 to 4 of 4 entries (1 row selected of 4) First Previous 1 Next Last

System will pop up window: "Are you sure you wish to delete the selected cell type?"

Click on "OK" button to delete the cell type from the system.

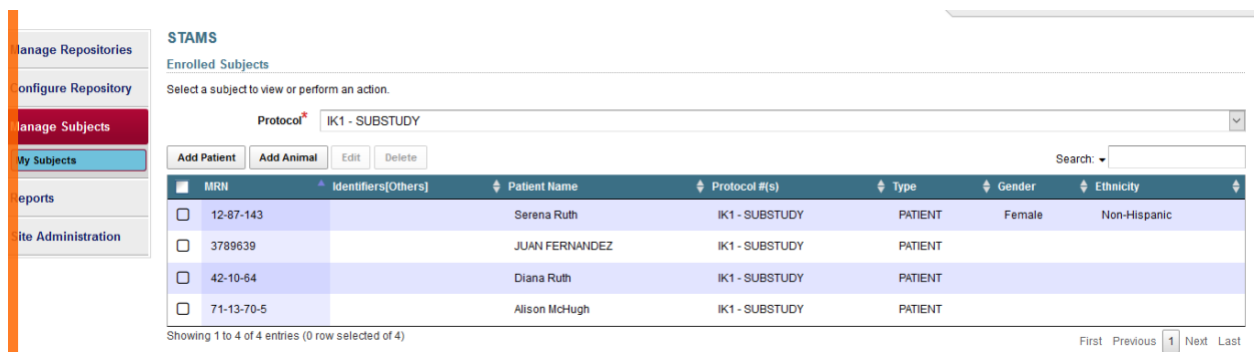
4.9 Add/Import Patients/Animals to Protocols

A patient/animal information can be added directly into STAMS or it can be imported from ProFoRMS module. **4.9.1 To add Patients/Animals**

To add Patients/Animals, click "Manage Subjects" from left menu and select protocol number from dropdown. Click on "Add Patient" to add a patient or click on "Add Animal" to add an animal.

4.9.1.1 To add Patients

Click on "Add Patient" to add a patient.



STAMS
Enrolled Subjects

Select a subject to view or perform an action.

Protocol: IK1 - SUBSTUDY

Add Patient Add Animal Edit Delete Search:

MRN	Identifiers(Others)	Patient Name	Protocol #(s)	Type	Gender	Ethnicity
<input type="checkbox"/>	12-87-143	Serena Ruth	IK1 - SUBSTUDY	PATIENT	Female	Non-Hispanic
<input type="checkbox"/>	3789639	JUAN FERNANDEZ	IK1 - SUBSTUDY	PATIENT		
<input type="checkbox"/>	42-10-84	Diana Ruth	IK1 - SUBSTUDY	PATIENT		
<input type="checkbox"/>	71-13-70-5	Alison McHugh	IK1 - SUBSTUDY	PATIENT		

Showing 1 to 4 of 4 entries (0 row selected of 4) First Previous 1 Next Last

To add patient, click "Add Patient" button, create patient page opens. Enter the required fields to add new patient to the protocol. Important point to note here is

that, new patient created here can be assigned/added to other protocols as well using the multi select list “Related Protocols” as shown in below picture.

STAMS

[] Source Information

Get From Proforms

Patient/Source Name*

First Name [PII]

Address[PII]

State

Country

Alternate Phone [PII]

Date of Birth Format: YYYY-MM-DD

Ethnicity

Related Protocols

Diagnosis Hemolyzed

Type of Other Id (e.g. HMC)

Salutation

Last Name [PII]

City

Zip

Phone [PII]

Gender

Race

Medical Record Number

Notes

Other Id

Save Reset Cancel

4.9.1.2 To import Patients from ProFoRMS moldule

The user can click “Get From Proforms” button to import patient from proforms.



Click Save to add/create the new Patient. A page appears here that display all the added Patients to the selected Protocol.

4.9.1.3 To add animal

To add Patients/Animals, click “Manage Subjects” from left menu and select protocol number from dropdown. Click on “Add Patient” to add a patient or click on “Add Animal” to add an animal.

Select protocol number from dropdown and click on “Add Patient” to add a patient.

STAMS

Enrolled Subjects

Select a subject to view or perform an action.

Protocol* IK1 - SUBSTUDY

Add Patient Add Animal Edit Delete Search:

MRN	Identifiers[Others]	Patient Name	Protocol #(s)	Type	Gender	Ethnicity
<input type="checkbox"/> 12-87-143		Serena Ruth	IK1 - SUBSTUDY	PATIENT	Female	Non-Hispanic
<input type="checkbox"/> 3789639		JUAN FERNANDEZ	IK1 - SUBSTUDY	PATIENT		
<input type="checkbox"/> 42-10-64		Diana Ruth	IK1 - SUBSTUDY	PATIENT		
<input type="checkbox"/> 71-13-70-5		Alison McHugh	IK1 - SUBSTUDY	PATIENT		

Showing 1 to 4 of 4 entries (0 row selected of 4) First Previous 1 Next Last

STAMS

[] Source Information

Animal Name*

Facility ID

Related Protocols

- IK1 - SUBSTUDY
- TEST_FEB13
- 0777-01-12281978-NP
- TESTPROTOCOL
- 1923423423457

Save Reset Cancel

4.9.2 Edit/Delete Patients/Animals information

Here user can choose to “Edit” or “Delete” the Patients/Animals from the system.

STAMS

Enrolled Subjects

Select a subject to view or perform an action.

Protocol* IK1 - SUBSTUDY

Add Patient Add Animal Edit Delete Search:

MRN	Identifiers[Others]	Patient Name	Protocol #(s)	Type	Gender	Ethnicity
<input checked="" type="checkbox"/> 12-87-143		Serena Ruth	IK1 - SUBSTUDY	PATIENT	Female	Non-Hispanic
<input type="checkbox"/> 3789639		JUAN FERNANDEZ	IK1 - SUBSTUDY	PATIENT		
<input type="checkbox"/> 42-10-64		Diana Ruth	IK1 - SUBSTUDY	PATIENT		
<input type="checkbox"/> 71-13-70-5		Alison McHugh	IK1 - SUBSTUDY	PATIENT		

Showing 1 to 4 of 4 entries (1 row selected of 4) First Previous 1 Next Last

4.10 Add /Modify/Delete Virtual Sample

4.10.1 Add Virtual Sample

Any user that has access to a Repository can add a Sample.

Note: A Cell Type, Protocol, and Patient must be added in the system before adding a sample.

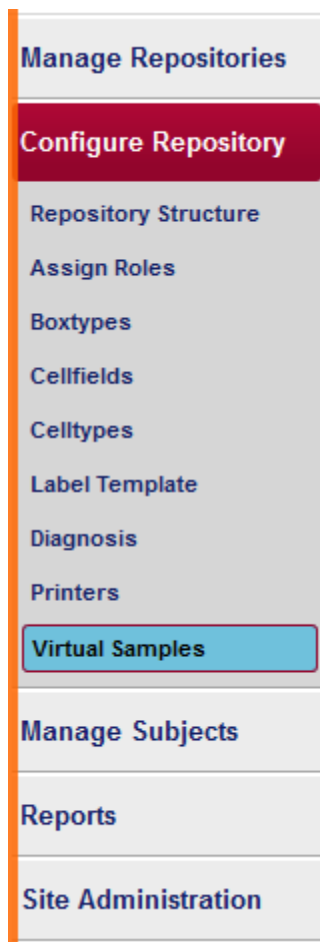
A Sample can be added to the System via

1. Virtual Placeholder
2. From a Box context menu – This feature allows directly creating a Sample to the Box without going through a Virtual Placeholder

Option 1 is used when user does not exactly know the location of the Container/Freezer/Box to add the Sample. This could occur in the practical scenarios and system allows users to add Samples using this option

Option 2 is used when user is certain of the location where the Sample should be added. (Refer to section 4.12 for details on how to use this Option)

Using Option 1, to add a Sample in the system, click on “Virtual Samples” sub menu under “Configure Repository” menu.



STAMS
Virtual Placeholder

To work with a sample, while creating it, system provides a feature to save the sample information until it is finalized. A temporary area holds the sample information and is termed as a "Virtual Placeholder" in the system. System takes the UI directly to create the Virtual Placeholder when a new sample is added.

The UI for virtual place holder display look like in below:

1. "Configure Repository"->"Virtual Samples"-> Virtual Placeholder
2. Add sample information on the right side

Select all mandatory  information and click "Save Sample" button.

1. Cell type name (refer to section 4.6 on how to add a Cell type)
2. Project protocol number (from proforms)
3. Source/Patient (refer to section 4.7 on how to add a Patient to a Protocol)
4. Date Frozen (this is not required for some repository)
5. Frozen by

Add Sample Information:

Cell Type Information	
Cell/Sample Type Name*	slab cell type second cell
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number*	IK1 - SUBSTUDY
Source/Patient*	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	Format: YYYY-MM-DD
Time Type	--- Select ---
Time Collected	(H:MM AM/PM)
Sample Number	
Date Frozen*	Format: YYYY-MM-DD
Time Frozen	(H:MM AM/PM)
Frozen By*	wang, lan

Additional Sample Information	
Sample Barcode	
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	/ml
Volume	1 ml
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples

Save Sample Reset Cancel

Sample will be saved and shown under Virtual place holder.

Manage Repositories

- Configure Repository
- Repository Structure
- Assign Roles
- Boxtypes
- Cellfields
- Celltypes
- Label Template
- Diagnosis
- Printers
- Virtual Samples

Manage Subjects

Reports

Site Administration

STAMS

Virtual Placeholder

Serum Whole Bl... DNA

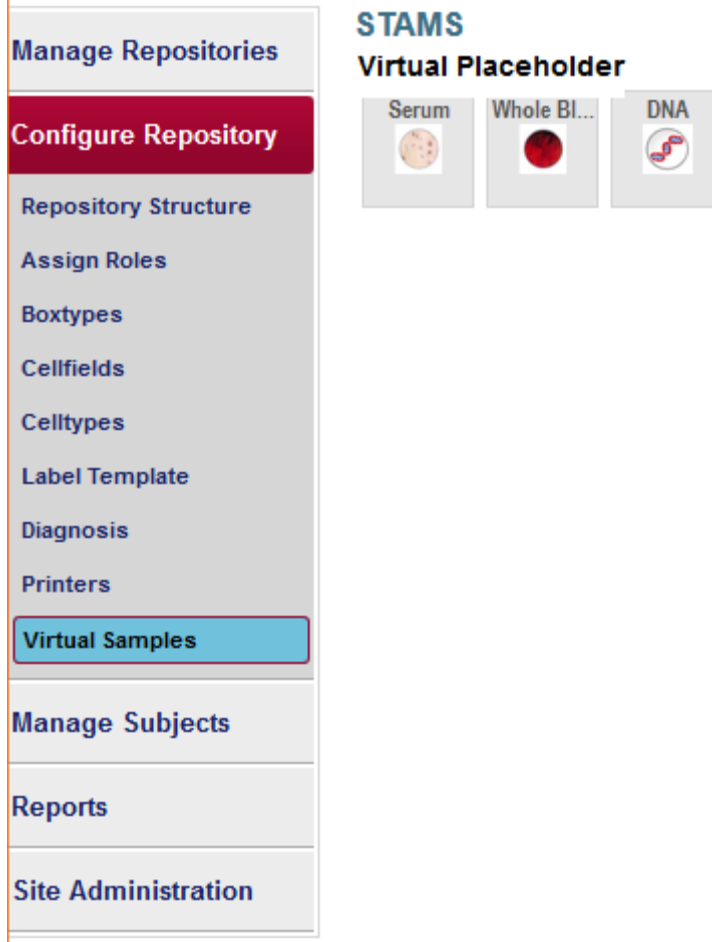
Add Sample Information:

Cell Type Information	
Cell/Sample Type Name*	Whole Blood DNA Serum Plasma
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number*	IK1 - SUBSTUDY
Source/Patient*	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	Format: YYYY-MM-DD
Time Type	-- Select --
Time Collected	(H:MM AM/PM)
Sample Number	
Date Frozen*	Format: YYYY-MM-DD
Time Frozen	(H:MM AM/PM)
Frozen By*	wang, lan

Additional Sample Information	
Sample Barcode	
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	/ml
Volume	1 ml
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples

The link "Virtual Samples" available on the left sub menu

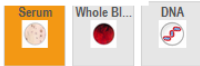


4.10.2 Edit Virtual Sample

In order to edit virtual sample from Virtual Placeholder, click on the virtual Sample and click "Edit" button.

STAMS

Virtual Placeholder



Serum -



Cell Type Information	
Cell/Sample Type Name	Serum
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number	IK1 - SUBSTUDY
Source/Patient	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-07-03
Time Type	NONE
Time Collected	
Sample Number	
Date Frozen	2020-07-03
Time Frozen	
Frozen By	Mersha, Meg

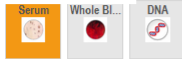
Additional Sample Information	
Sample Barcode	400021
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	
Volume	1 mL
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples

Processed Person Information:

Sample Processed By	Mersha, Meg on 2020-07-22
Sample Last Updated By	Mersha, Meg on 2020-07-22

Update the Cell Type name, Protocol/Project Number, Source/Patient, Date Frozen and click on “Save Sample” button to edit sample.

Virtual Placeholder



Serum -




Print Barcode

Edit Serum Sample Information:

Cell Type Information	
Cell/Sample Type Name*	Serum
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number*	IK1 - SUBSTUDY
Source/Patient*	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-07-03
Time Type	--- Select ---
Time Collected	(H:MM AM/PM)
Sample Number	
Date Frozen*	2020-07-03
Time Frozen	(H:MM AM/PM)
Frozen By*	Mersha, Meg

Additional Sample Information	
Sample Barcode	400021
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	/mL
Volume	1 mL
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples
Processed Person Information:	
Sample Processed By	Mersha, Meg on 2020-07-22
Sample Last Updated By	Mersha, Meg on 2020-07-22

 **Print Barcode**

Edit Serum Sample Information:

Cell Type Information	
Cell/Sample Type Name*	Serum
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number*	IK1 - SUBSTUDY
Source/Patient*	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-07-03
Time Type	--- Select ---
Time Collected	(H:MM AM/PM)
Sample Number	
Date Frozen*	2020-07-03
Time Frozen	(H:MM AM/PM)
Frozen By*	Mersha, Meg

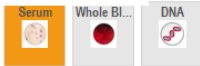
Additional Sample Information	
Sample Barcode	400021
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	/mL
Volume	1 mL
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples
Processed Person Information:	
Sample Processed By	Mersha, Meg on 2020-07-22
Sample Last Updated By	Mersha, Meg on 2020-07-22

4.10.3 Delete Virtual Sample from Virtual place holder:

To delete a sample, click a sample and click on the "Delete" button.

STAMS

Virtual Placeholder



Serum -



Cell Type Information	
Cell/Sample Type Name	Serum
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number	IK1 - SUBSTUDY
Source/Patient	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-07-03
Time Type	NONE
Time Collected	
Sample Number	
Date Frozen	2020-07-03
Time Frozen	
Frozen By	Mersha, Meg

Additional Sample Information	
Sample Barcode	400021
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	
Volume	1 mL
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples

Processed Person Information:

Sample Processed By	Mersha, Meg on 2020-07-22
Sample Last Updated By	Mersha, Meg on 2020-07-22

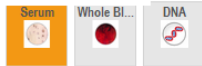
The system will prompt you to confirm as shown below
Click "OK" button to delete the sample from the Virtual place holder.

4.10.4 View History of a Virtual Sample

To view the history of a sample, select a sample and click on the "View History" button.

STAMS

Virtual Placeholder



Serum -



Cell Type Information	
Cell/Sample Type Name	Serum
Cell Type Description	
Cell Type Note	
Cryo Solution	

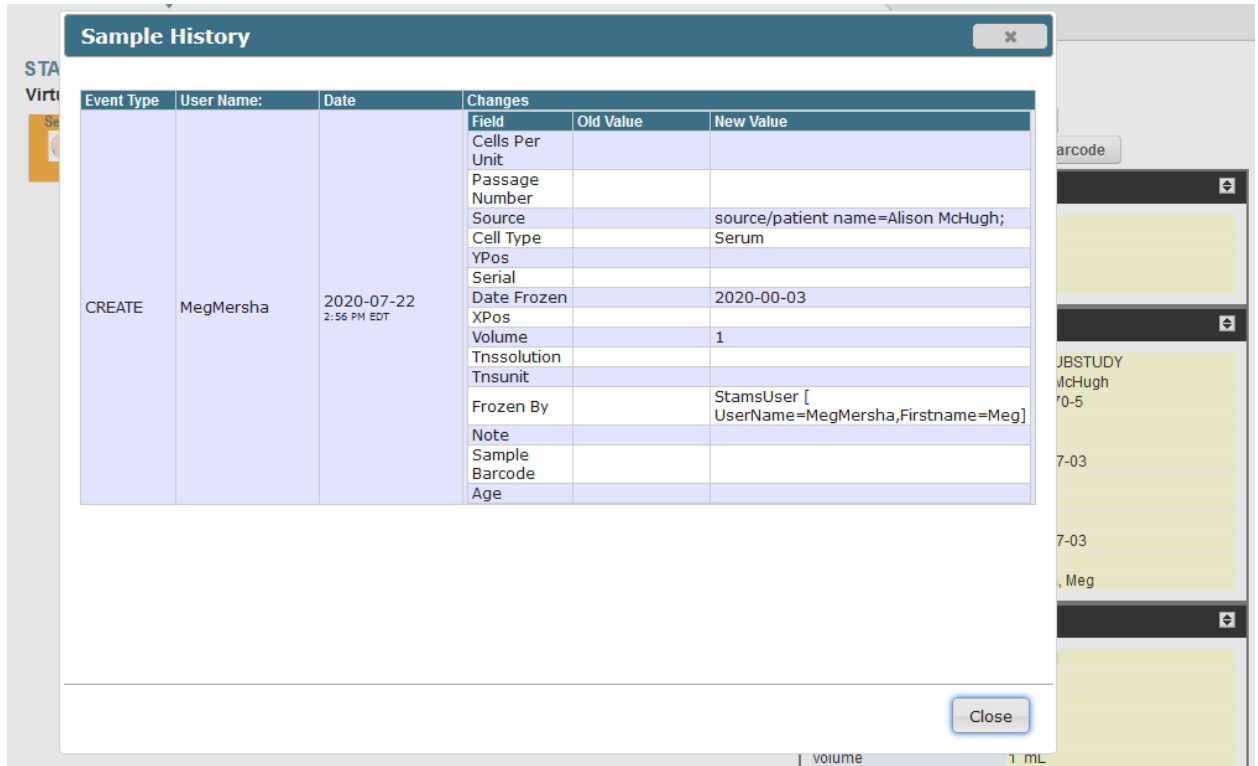
Source/Patient Sample Information	
Protocol/Project Number	IK1 - SUBSTUDY
Source/Patient	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-07-03
Time Type	NONE
Time Collected	
Sample Number	
Date Frozen	2020-07-03
Time Frozen	
Frozen By	Mersha, Meg

Additional Sample Information	
Sample Barcode	400021
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	
Volume	1 mL
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples

Processed Person Information:

Sample Processed By	Mersha, Meg on 2020-07-22
Sample Last Updated By	Mersha, Meg on 2020-07-22

System displays the history of the sample in a new tab as shown below.



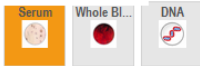
4.10.5 Print Barcode from Virtual place holder

A barcode can be printed to affix on the vial where the Sample is stored. To print the barcode of a sample, select a virtual Sample (**Note: The sample information display time varies from 1 to 5 seconds depending on the network speed**).

from Virtual place holder and click “Print Barcode” icon

STAMS

Virtual Placeholder



Serum -



Cell Type Information	
Cell/Sample Type Name	Serum
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number	IK1 - SUBSTUDY
Source/Patient	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-07-03
Time Type	NONE
Time Collected	
Sample Number	
Date Frozen	2020-07-03
Time Frozen	
Frozen By	Mersha, Meg

Additional Sample Information	
Sample Barcode	400021
Position X / Y	N/A
Serial No.	
TNS Solution	
Cells Per Unit	
Volume	1 mL
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples

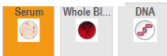
Processed Person Information:

Sample Processed By	Mersha, Meg on 2020-07-22
Sample Last Updated By	Mersha, Meg on 2020-07-22

System will provide to select options like below to select printer names, label template, and number of copies to print.

STAMS

Virtual Placeholder



Serum -



Print Barcodes

Sample Barcode(s):

Printer Names:

Label Template: *

Number of Copies: *

Cancel Print Barcodes

Cell Type Information	
Cell/Sample Type Name	Serum
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number	IK1 - SUBSTUDY
Source/Patient	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-07-03
Time Type	NONE
Time Collected	
Sample Number	
Date Frozen	2020-07-03
Time Frozen	
Frozen By	Mersha, Meg

Additional Sample Information	
Volume	1 mL
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples

Processed Person Information:

Sample Processed By	Mersha, Meg on 2020-07-22
Sample Last Updated By	Mersha, Meg on 2020-07-22

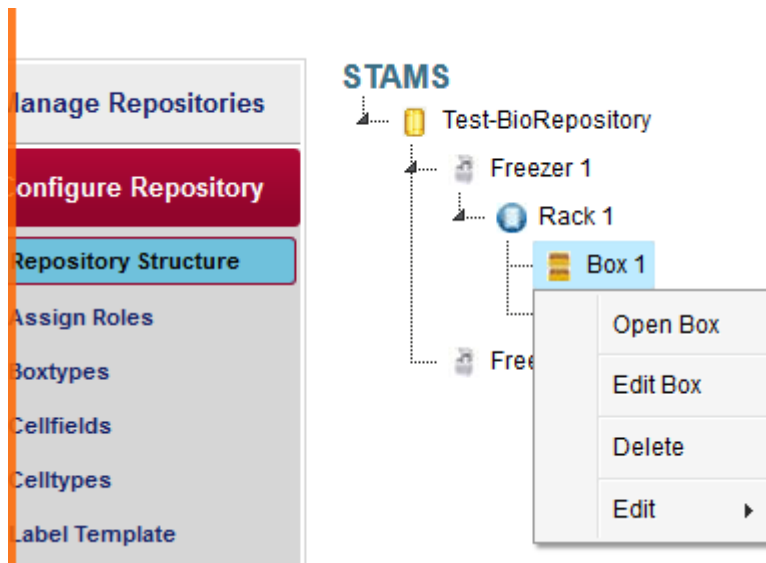
Select the options and click "Print Barcodes" button.

System will print sample barcode information on the label utilizing the predesigned sample barcode template.

4.10.6 Copy/Cut/Paste Virtual Sample

A sample can be taken from a Virtual Placeholder to new or existing box






































Right click on the box and select the "Open Box" button.



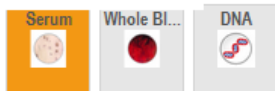
Virtual Samples added to the Virtual Placeholder will display underneath the Box.

STAMS

Box 2/Rack 1/Freezer 1

	1	2	3	4	5	6	7	8	9
1	Serum 								
2									
3									
4									
5									
6									
7									
8									
9									

Virtual Placeholder




















































































Copy sample from Virtual place holder to Box:

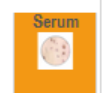
To copy a sample, select a sample and click on the “Copy” button, the system will display the context menu as shown below.

STAMS

Box 2/Rack 1/Freezer 1

	1	2	3	4	5	6	7	8	9
1									
2									
3									
4									
5									
6									
7									
8									
9									

Virtual P



✕

Cell Type: Serum
 Patient Name: Alison McHugh
 Date Frozen: 07/03/2020

Copy
Cut
Delete
Print Barcode

Click “Copy” button to copy the Virtual Sample. Now on the main table above the placeholder area, user can select one or more cells in it. To do that, select a cell in the box do a left click on mouse, hold and drag the mouse to select multiple cells. Here system will show a context popup with menu as shown in below picture.

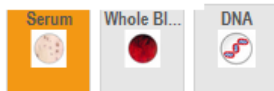
STAMS

Box 2/Rack 1/Freezer 1

	1	2	3	4	5	6	7	8	9
1	Serum								
2									
3									
4									
5									
6									
7									
8									
9									

[Close] | [Empty Clipboard and Close]
 Copy Serum @Random Position in Virtual Repository to the selected cell [Remove]

Virtual Placeholder




















































































Click “Copy” button **Copy** in the box to paste the Sample copied from Virtual Placeholder area. This will paste the selected sample into all of selected cells within the table for the Box.

To relocate the sample from virtual Placeholder area, select the sample and click on “Cut” button, the sample will be copied to the clip board. Select a new empty space in the box where it has to be relocated

STAMS

Box 2/Rack 1/Freezer 1

	1	2	3	4	5	6	7	8	9
1									
2									
3									
4									
5									
6									
7									
8									
9									

Virtual P












































































Cell Type: Serum
Patient Name: Alison McHugh
Date Frozen: 07/03/2020

Copy Cut Delete Print Barcode

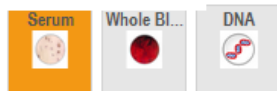
Select the cell in the Box and click on Relocate link **Relocate** in the context menu to move the sample to new space.

STAMS

Box 2/Rack 1/Freezer 1

	1	2	3	4	5	6	7	8	9
1	Serum 								
2									
3									
4	<div style="border: 1px solid black; background-color: #ffffcc; padding: 5px;"> [Close] [Empty Clipboard and Close] Relocate Serum @Random Position in Virtual Repository to the selected cell [Remove]</div>								
5									
6									
7									
8									
9									

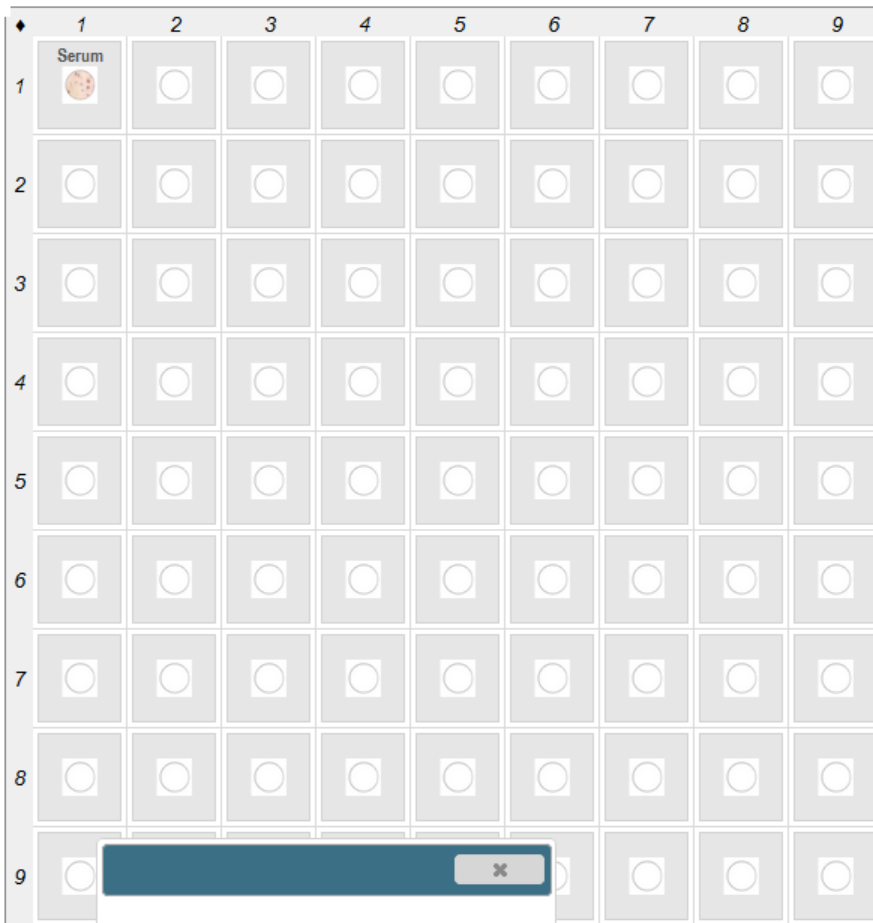
Virtual Placeholder



4.10.7 Delete a Virtual Sample under a box

STAMS

Box 2/Rack 1/Freezer 1



Virtual Placeholder



Cell Type: Serum
Patient Name: Alison McHugh
Date Frozen: 07/03/2020

Copy Cut Delete Print Barcode

4.10.8 Print barcode of a Virtual Sample or multiple virtual samples under a box.
There is only "Print Barcode" action for multiple selected virtual samples at "Virtual Placeholder" under a box

STAMS

Box 2/Rack 1/Freezer 1

	1	2	3	4	5	6	7	8	9
1	Serum								
2									
3									
4									
5									
6									
7									
8									
9									

Virtual P



Cell Type: Serum
Patient Name: Alison McHugh
Date Frozen: 07/03/2020

Copy Cut Delete Print Barcode

8									
9									

Virtual Placeholder



Print Barcode

4.11 Add /Edit/Delete a Sample directly to a Box

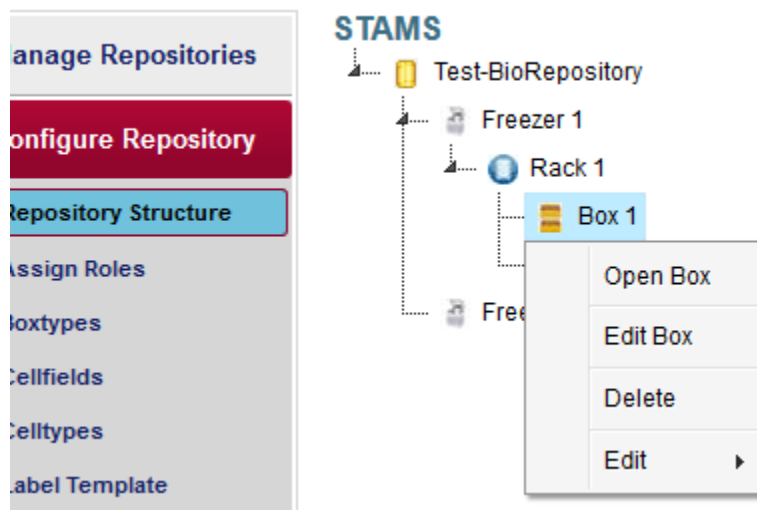
4.11.1 Add Sample to a New/ Existing BOX of a Repository

4.11.1.1 Open a box of a repository

To add a sample directly to a Box in the system, there are two ways to open a box of a repository.

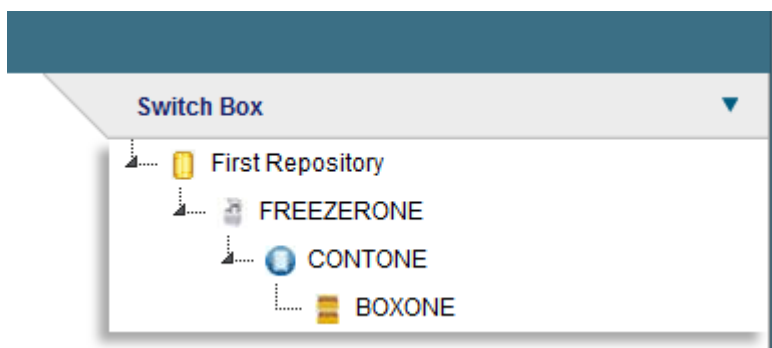
Option 1: select a repository, then, click “Configure Repository” left menu, the repository structure tree shows up for the selected Repository.

Following actions are available to perform on a Box that appears on the right click context menu as shown below. Click on “Open box” link to open the box.



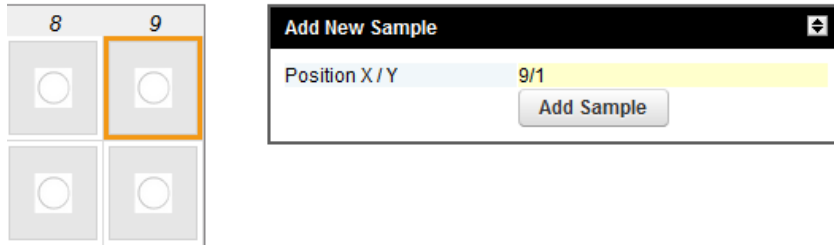
Option 2: use “Switch Box” shortcut to open the box -

Click on “Switch Box” at right top of the user interface.

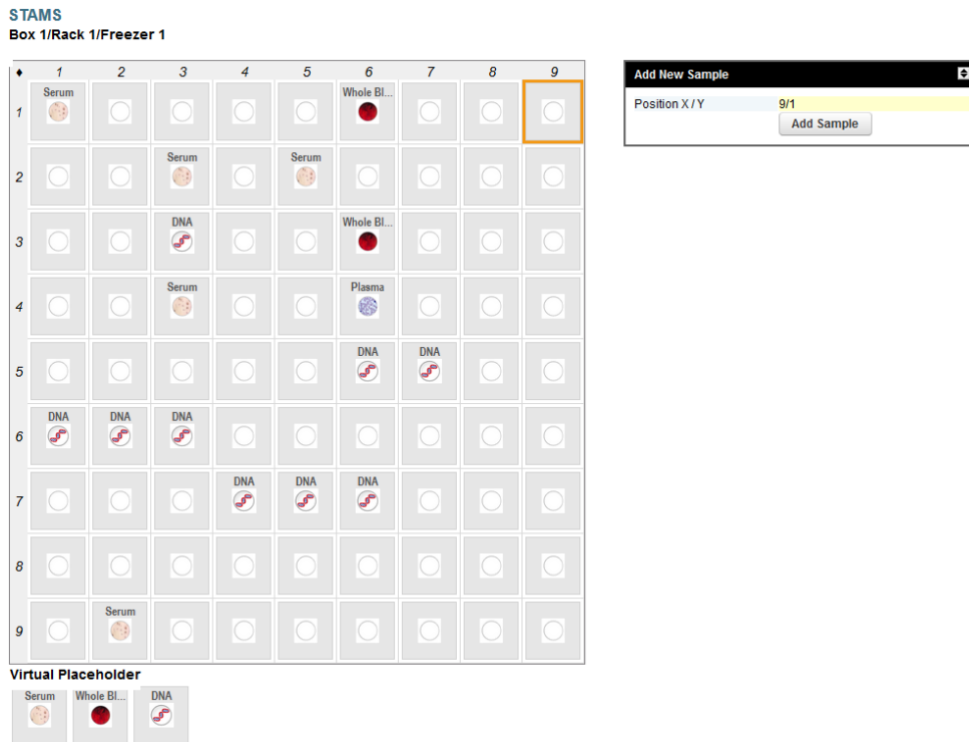


4.11.1.2 Add a Sample to the box

To add a sample, select an empty cell and “Add New Sample” frame appears on the right of the page. It will display the position of the cell.



Click on the “Add Sample” button.



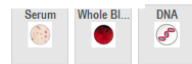
The system will display the fields to be entered next the box as shown below.

STAMS

Box 1/Rack 1/Freezer 1

	1	2	3	4	5	6	7	8	9
1	Serum					Whole BI...			
2			Serum		Serum				
3			DNA			Whole BI...			
4			Serum			Plasma			
5						DNA	DNA		
6	DNA	DNA	DNA						
7				DNA	DNA	DNA			
8									
9		Serum							

Virtual Placeholder



Edit Sample Information:

Cell Type Information	
Cell/Sample Type Name*	DNA
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number*	IK1 - SUBSTUDY
Source/Patient*	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	Format: YYYY-MM-DD
Time Type	--- Select ---
Time Collected	(H:MM AM/PM)
Sample Number	
Date Frozen*	Format: YYYY-MM-DD
Time Frozen	(H:MM AM/PM)
Frozen By*	wang, lan

Additional Sample Information	
Sample Barcode	
Position X / Y	9/1
Serial No.	
TNS Solution	
Cells Per Unit	
Volume	1 ml
Concentration	
Age	
Passage Number	

Edit Sample Information:

Cell Type Information

Cell/Sample Type Name* DNA
Cell Type Description
Cell Type Note
Cryo Solution

Source/Patient Sample Information

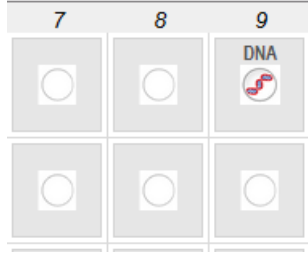
Protocol/Project Number* IK1 - SUBSTUDY
Source/Patient* Alison McHugh
MRN 71-13-70-5
Other Id
Patient Note
Date Collected Format: YYYY-MM-DD
Time Type --- Select ---
Time Collected (H:MM AM/PM)
Sample Number
Date Frozen* Format: YYYY-MM-DD
Time Frozen (H:MM AM/PM)
Frozen By* wang, lan

Additional Sample Information

Sample Barcode
Position X / Y 9/1
Serial No.
TNS Solution
Cells Per Unit /ml
Volume 1 ml
Concentration
Age
Passage Number
Note
Sample Parent Info Independent Sample, No Parent
Sample Tracking Remaining Samples
Processed Person Information:
Sample Processed By on

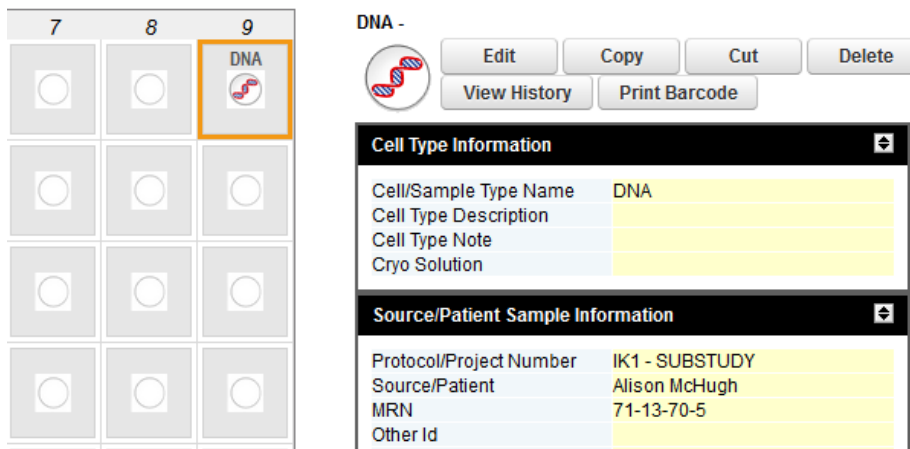
Save Sample Reset Cancel

Select the Cell Type name, Protocol /Project number, Source/Patient, Date frozen, frozen by and click on “Save Sample” button to add new sample. New Sample will be added to the selected cell.

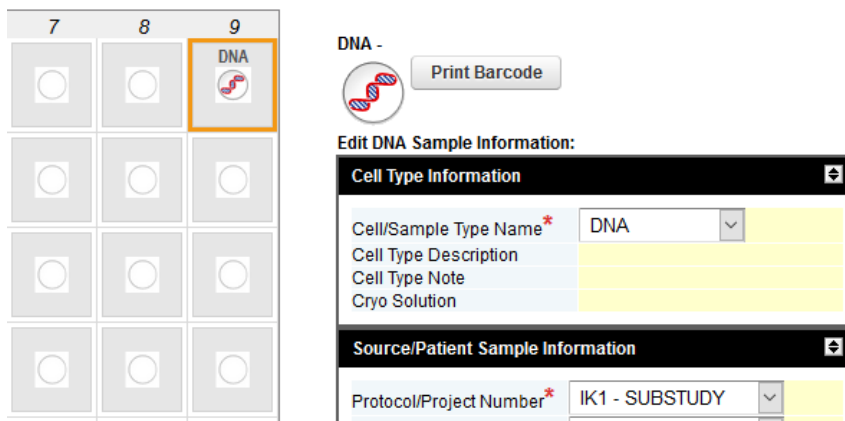


4.11.2 Edit Sample from the Box

To edit a sample, select a sample and click on the “Edit” button.



System will display the fields regarding sample information next to the box as shown below.



Edit the Values in all fields and click “Save Sample” button.

Update the Protocol/Project Number, Source Patient, Date, Frozen by and click on “Save Sample” button to edit sample.

Print Barcode

Edit DNA Sample Information:

Cell Type Information

Cell/Sample Type Name*	DNA
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information

Protocol/Project Number*	IK1 - SUBSTUDY
Source/Patient*	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-08-20
Time Type	--- Select ---
Time Collected	
Sample Number	
Date Frozen*	2020-08-20
Time Frozen	
Frozen By*	wang, lan

Additional Sample Information

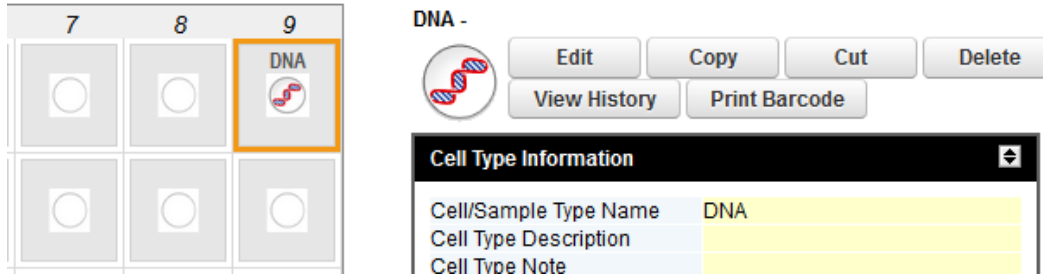
Sample Barcode	400154
Position X / Y	9/1
Serial No.	
TNS Solution	
Cells Per Unit	
Volume	1
Concentration	
Age	
Passage Number	
Note	
Sample Parent Info	Independent Sample, No Parent
Sample Tracking	Remaining Samples
Processed Person Information:	
Sample Processed By	wang, lan on 2020-08-18
Sample Last Updated By	wang, lan on 2020-08-18

Save Sample
Reset
Cancel

4.11.3 Copy/Aliquot/Cut a Sample inside a BOX:

4.11.3.1 Copy/Aliquot sample inside the same BOX:

To copy/Aliquot a sample from one Cell to different cell, select a Sample and click on the “Copy” button next to the box.

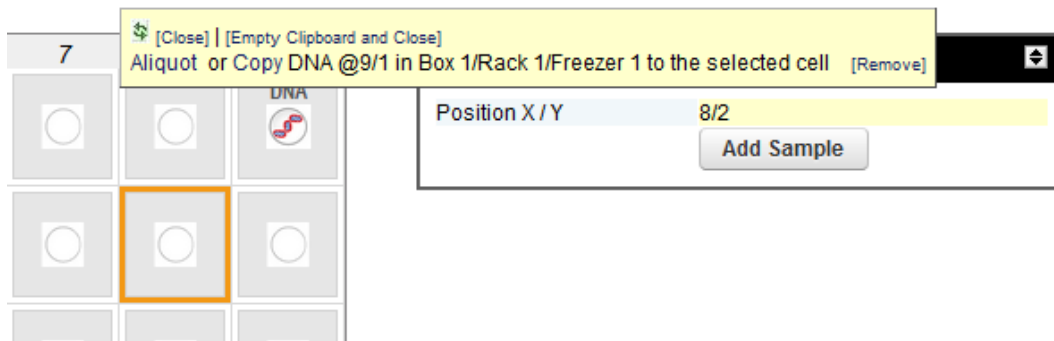


Click on the empty cell inside the box and “copy” link [Copy](#) and “Aliquot” link [Aliquot](#) will be displayed as below.

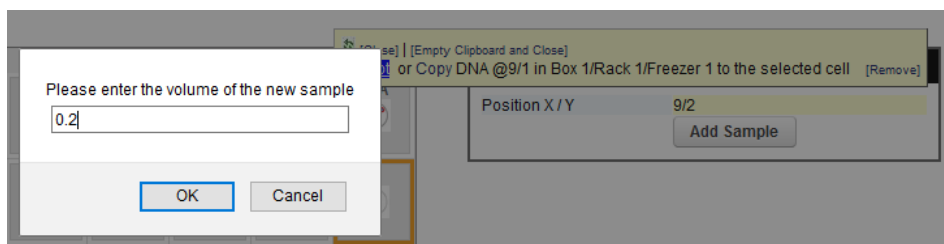
Sample will be copied to the selected cell after clicking “copy” link [Copy](#) from the clipboard.

Or, Sample will be aliquoted to the selected cell after clicking “Aliquot” link [Aliquot](#) from the clipboard.

as below.



Note: click on “Aliquot” link [Aliquot](#), System will give small popup message like below to enter the volume of the new sample. Enter the volume as 0.2 for example and click “OK” button:



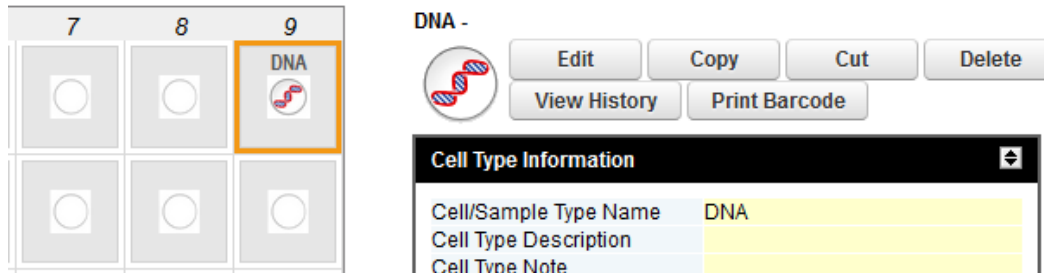
The new sample will be saved with 0.2 ML volume to the selected cell inside the box.

Original sample value will change to original volume minus 0.2 ML.

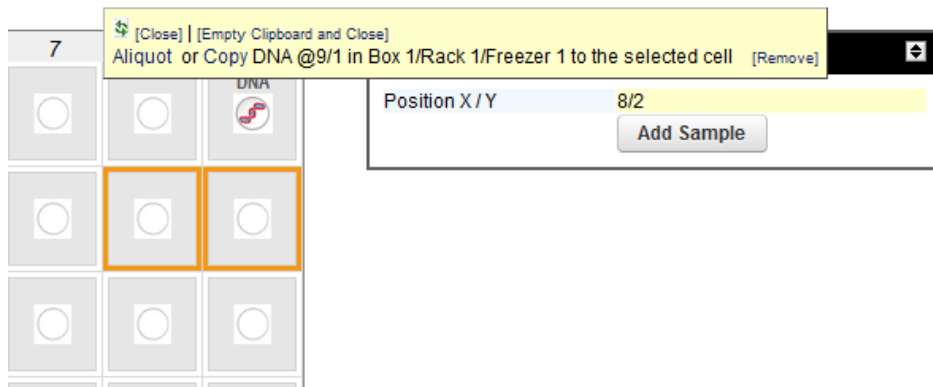
Original sample value will change to original volume minus (0.2* cell number) ML for multiple cells.

4.11.3.2 Copy/Aliquot sample to multiple cells inside the same BOX:

To copy/aliquot a sample from one cell and paste to multiple cells, select a sample and click on the “Copy” button next to the box. To Paste **Copy** or Aliquot **Aliquot** the copied sample click on an empty space in the box, the system will display the context menu as shown below.

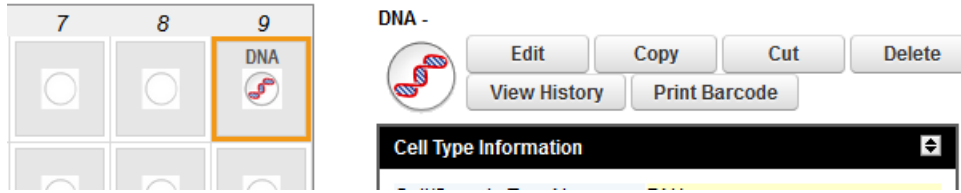


Select the empty cell and hold left mouse button and drag to select multiple cells to paste **Copy** or to aliquot **Aliquot**.



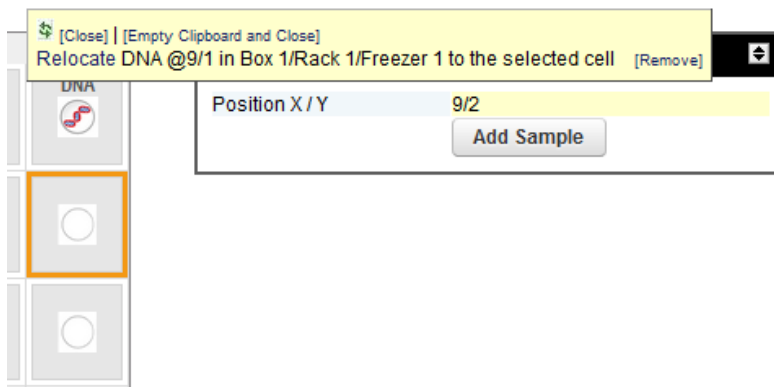
4.11.3.3 Cut/relocate sample inside the same BOX

To relocate the sample in the box, select a sample and click on the “Cut” button next to the box

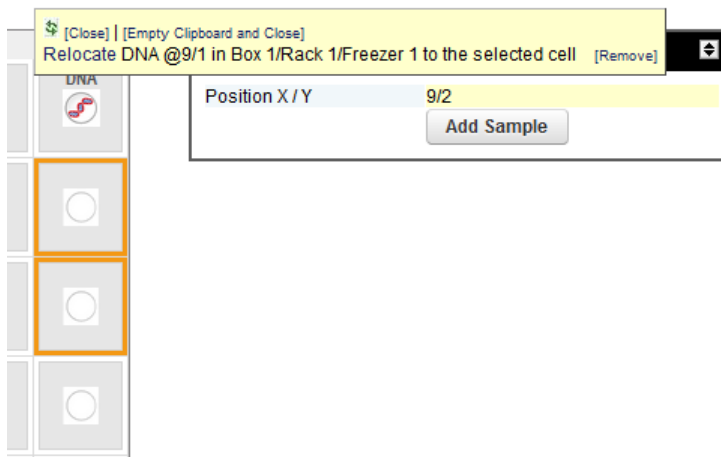


To relocate click on an empty space in the box, the system will display the context menu as shown below.

Click on the Relocate link **Relocate** in the context menu to move the sample to new space.



4.11.3.4 Cut/relocate sample to multiple cells inside the same BOX

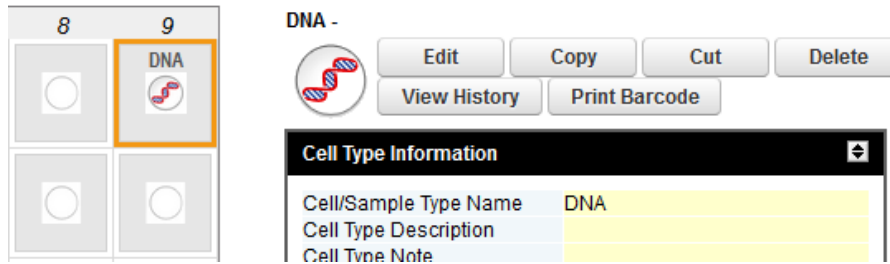


4.11.4 Copy/aliquot/cut sample from one box to another box:

4.11.4.1 Copy/aliquot sample from one box to another box:

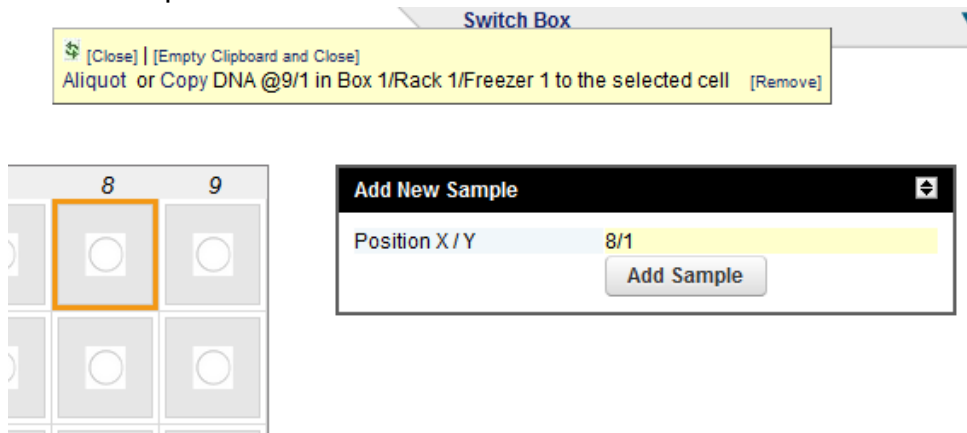
Step 1:

Open a Box and select a Sample and click on the “Copy” button next to the box.



Step 2:

Open another box. Click on the cell inside the box to view “Copy” link [Copy](#) and “Aliquot” link [Aliquot](#) from clipboard and click on “copy” [Copy](#) or “aliquot” [Aliquot](#) from the clipboard.



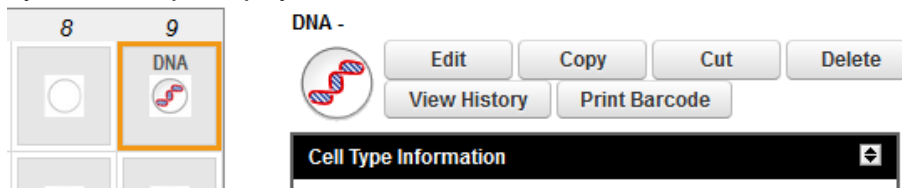
Sample will be copied to the different box after clicking “copy” link [Copy](#) or “aliquot” link [Aliquot](#) from the clipboard.

4.11.4.2 Copy/aliquot sample from one box to multiple cells in another box.

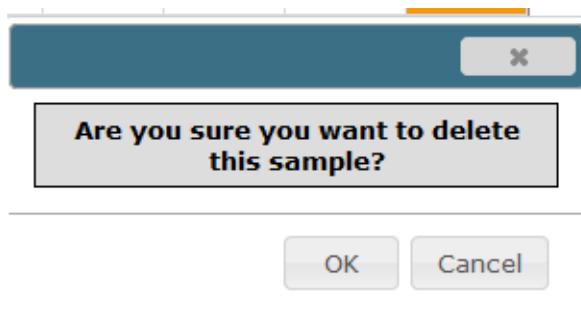
Note: Sample can be **copied/aliquoted/relocated** from one box to multiple cells in a different box.

4.11.5 Delete Sample from the Existing Box

To delete a Sample, select a sample and click on the “Delete” button. The system will prompt you to confirm as shown below



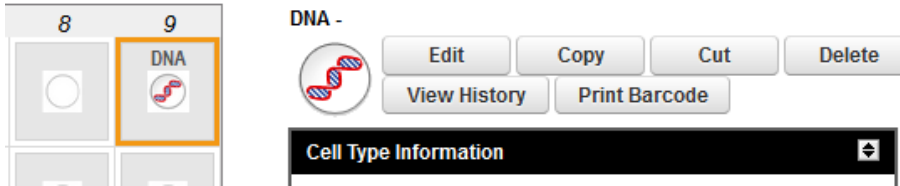
Click “OK” button, the system will prompt you “Are you sure you want to delete this sample”.



Click on “OK” button to delete the Sample from the box.

4.11.6 View History of a Sample

To view the history of a sample, select a sample and click on the “View History” button. The system displays the history of the sample in a new tab as shown below.

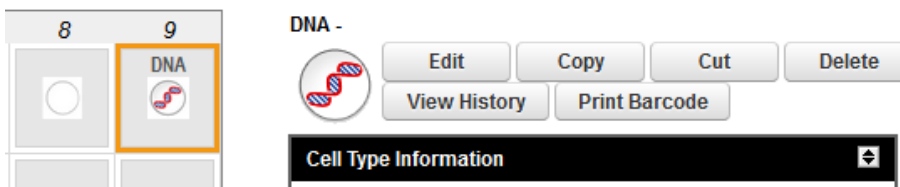


Sample history will be displayed like below.

Sample History					
Event Type	User Name:	Date	Changes		
			Field	Old Value	New Value
CREATE	wangla	2020-08-18 2:55 PM EDT	Cells Per Unit		
			Passage Number		
			Source		source/patient name=Alison McHugh;
			Cell Type		DNA
			YPos		9
			Serial		
			Date Frozen		2020-08-20
			XPos		1
			Volume		1
			Tnnsolution		
			Tnsunit		
			Frozen By		StamsUser [UserName=wangla,Firstname=lan]
			Note		
			Sample Barcode		400154
Age					

4.11.7 Print Sample Barcode

To print the barcode of a Sample, select a Sample from box, select click on the "Print Barcode" button.



System will provide to select options like below to select Printer Names (refer to section 4.15), Label template (Refer to section 4.14) and number of copies to print.

Print Barcodes

Sample Barcode(s): 400154

Printer Names:

Label Template:* Label 1

Number of Copies:* 1

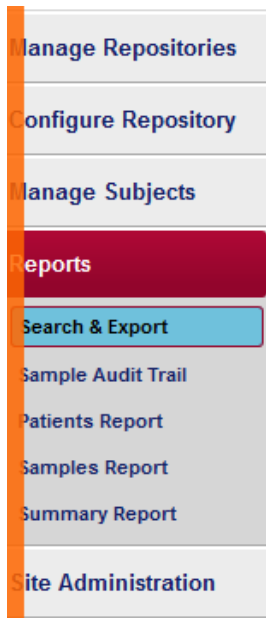
Cancel Print Barcodes

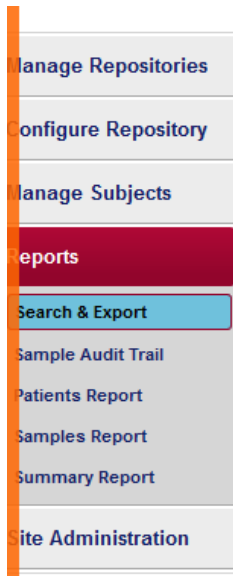
Select the options and click “Print Barcode” button.

The system will print sample barcode information on the label utilizing the predesigned sample barcode template.

4.12 Search & Export Samples

Samples can be searched using the Search feature in the system. Also, they can be exported into a spreadsheet. To search for a Sample, under the “Reports” menu on the left side, select the “Search & Export”.






STAMS

[-] Search & Export

A small square button with a plus sign inside.

Click , pick up one from the dropdown. Options in the drop down are “Barcode” or “Protocol Number” or “Patient” or “Source Name” or “Cell Type” or “Cell Type Note/Description” or “Stored By” or “Created Date” or “MRN” or “Other ID” or “Comments”

Select one of the options and click on  to finish one condition.

Continue to click  for the next condition.

When all conditions are done, hit the “Search” button to get the results.

STAMS

[-] Search & Export

Search

STAMS

[-] Search & Export

Sample Type contains "blood" ✕

A small square button with a plus sign inside.

STAMS

[] Search & Export

Sample Type contains "blood" ✕

Protocol Number

✕

Search results will be displayed like below

STAMS

[] Search & Export

+

Search:

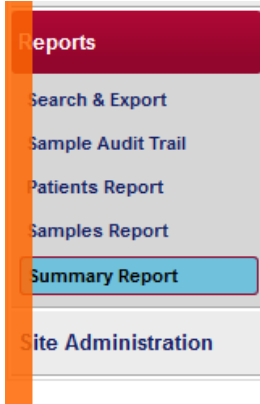
Barcode	Sample Path	X, Y Position	Type Name	Patient Name	MRN	Other Id	Race	Sample Date	Concentration	Volum	Diagnosis	Protocol Number
400055	Box 1/Rack 1/Freezer 1	2, 5	Whole Blood	Jane Doe	42-10-64		Other	07/10/2020 00:00:00		1.0		11-N-001
400062	Box 1/Rack 1/Freezer 1	0, 5	Whole Blood	Alison McHugh	71-13-70-5			N/A		1.0		IK1 - SUBSTUDY

Showing 1 to 2 of 2 entries First Previous **1** Next Last

4.13 Scanning the Labels:

System assigns a unique id for the sample stored in the database. This id is utilized to generate the barcode, which can be printed using the barcode printer on the label. The label is struck on the vial and stored in the box/container/freezer. The barcode reader is used scan the barcode; the system will automatically pull the sample information on the screen based on the input from barcode reader while searching using "Search" field by using the Scanner instrument. After searching using scanner, system redirects to the page where it will retrieve and list all the samples.

On the sub menu "Summary Report" under "Reports", enter sample barcode 400154, for example, and click "Search" button.



STAMS

[] Search Filters

Enter a value to search and perform an action

Search Repository

Search

The list of samples with barcode 400154 will be listed.

STAMS

[] Search Filters

Enter a value to search and perform an action

Search Repository

Search

Download

Search:

Barcode	Sample Path	X, Y Position	Type Name	Patient Name	MRN	Other Id	Rac	Sample Date	Concentratio	Volum	Diagnosi	Protocol Numbe
400154	Box 1/Rack 1/Freezer 1	0, 8	DNA	Allison McHugh	71-13-70-5			08/20/2020 00:00:00		1.0		IK1 - SUBSTUDY

Showing 1 to 1 of 1 entries

First Previous Next Last

Click on the barcode link (400154 link), it will bring the user to the box with the sample.

DNA -

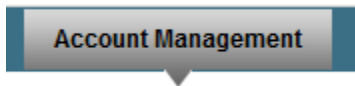
Cell Type Information	
Cell/Sample Type Name	DNA
Cell Type Description	
Cell Type Note	
Cryo Solution	

Source/Patient Sample Information	
Protocol/Project Number	IK1 - SUBSTUDY
Source/Patient	Alison McHugh
MRN	71-13-70-5
Other Id	
Patient Note	
Date Collected	2020-08-20
Time Type	NONE
Time Collected	
Sample Number	
Date Frozen	2020-08-20
Time Frozen	
Frozen By	wang, lan

Additional Sample Information	
Sample Barcode	400154
Position X / Y	9/1
Serial No.	
TNS Solution	
Cells Per Unit	
Volume	1 mL

4.14 Assign User to the system (System admin only)

To assign a user to STAMS system through “**Account Management**” application.



Step 1:

Click on the “Account Management/Request Additional Privileges” left menu, Add “Stams” and/or “Stams Admin” in “Privileges” table.

Stams	Active	No Expiration Date
Stams Admin	Active	No Expiration Date

Request Additional Privileges

Account Privileges

Search:

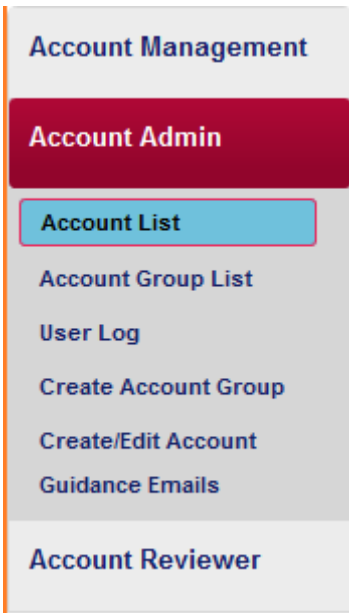
PRIVILEGE	STATUS	EXPIRATION DATE
Query	Active	No Expiration Date
Query Tool Admin	Active	No Expiration Date
Reporting Admin	Active	No Expiration Date
Stams	Active	No Expiration Date
Stams Admin	Active	No Expiration Date
Study Admin	Active	No Expiration Date

Showing 16 to 21 of 21 entries

First Previous 1 2 Next Last

Step 2:

Click on the "Account Admin/Account List" menu on the left side.



Under the "Account List" table, find and click on the user's username.

Account Management

Account Management

Account Admin

Account List

Account Group List

User Log

Create Account Group

Create/Edit Account

Guidance Emails

Account Reviewer

Account List

Status: All Download Search:

USERNAME	NAME	EMAIL	INSTITUTION	SUBMITTED	LAST UPDATED	STATUS
trial_two-1574347578763	Prasannakumar, Sindhu	sindhu2.prasannakumar@nth.gov	NINDS	2019-11-19	2019-11-21	Withdrawn
vmannur	Mannur, Vivek	vivek.mannur@nih.gov	NINDS	2019-02-13	2020-08-04	Active
wangla	Wang, Lan	wangla@nih.gov	NINDS	2019-02-13	2020-07-17	Active
yogi-1568231346111	Khanal, Yogaraj	yogaraj.khanal@nih.gov		2019-02-13	2019-02-13	Inactive

Showing 76 to 79 of 79 entries First Previous 1 2 3 4 5 6 Next Last

Add “Stams” and/or “Stams Admin” in “User Account Privileges” table. Edit and “Save” this page.

Stams	Active	No Expiration Date
Stams Admin	Active	No Expiration Date

User Account Privileges

PRIVILEGE	STATUS	EXPIRATION DATE
Account	Active	No Expiration Date
Account Admin	Active	No Expiration Date
Account Reviewer	Active	No Expiration Date
Admin	Active	No Expiration Date
Biosample Orders Admin	Active	No Expiration Date
Data Dictionary	Active	No Expiration Date
Data Repository	Active	No Expiration Date
Dictionary Admin	Active	No Expiration Date
Dictionary eForm	Active	No Expiration Date
GUID	Active	No Expiration Date
GUID Admin	Active	No Expiration Date
Meta Study	Active	No Expiration Date
Meta Study Admin	Active	No Expiration Date
ProFoRMS	Active	No Expiration Date
ProFoRMS Admin	Active	No Expiration Date
Query	Active	No Expiration Date
Query Tool Admin	Active	No Expiration Date
Reporting Admin	Active	No Expiration Date
Stams	Active	No Expiration Date
Stams Admin	Active	No Expiration Date
Study Admin	Active	No Expiration Date

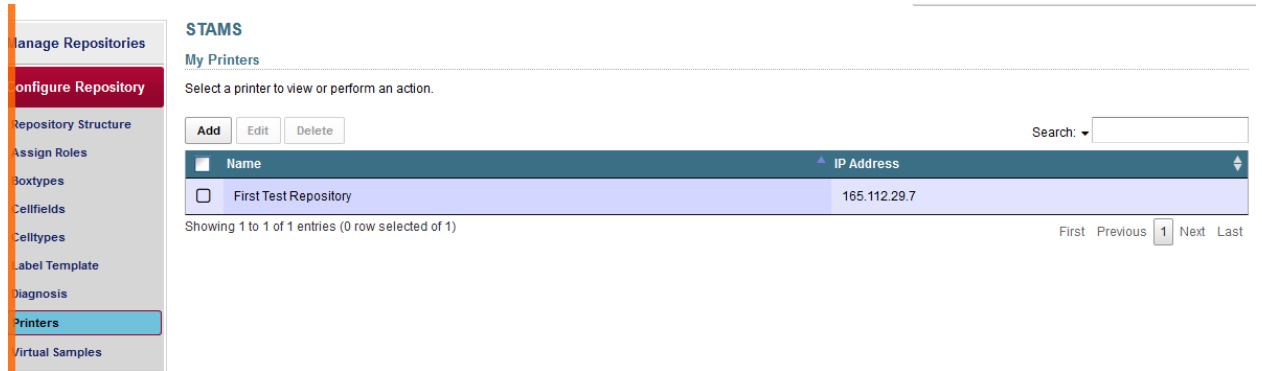
4.15 Add Users to a protocol (Lab Admin only)

To add user to Protocol through **PROFORMS** application.

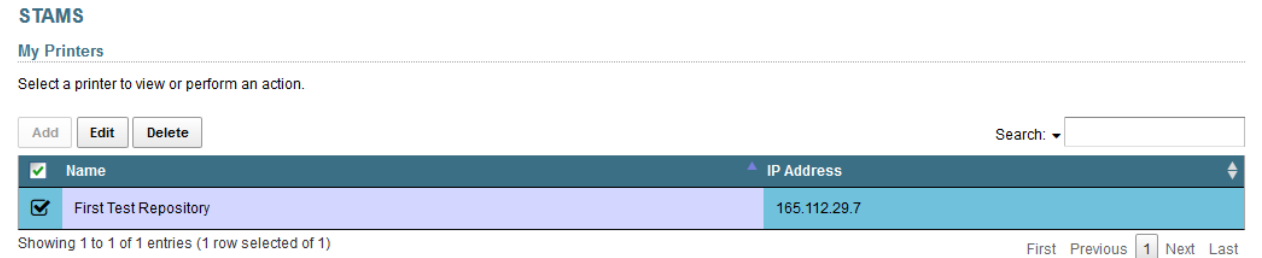
4.16 Add/Edit/Delete a printer (System Admin & Lab Admin)

To add a Printer in the system, click “Printers” left sub menu under “Configure Repository” for the selected Repository.

To add a printer, click on “Add” button.



To Edit/Delete a printer, select (check) a printer, and click on “Edit” or “Delete” button.



Enter the name of the new printer (required) and the IP Address (required)



Enter the name of the new printer (required) and the IP Address (required)

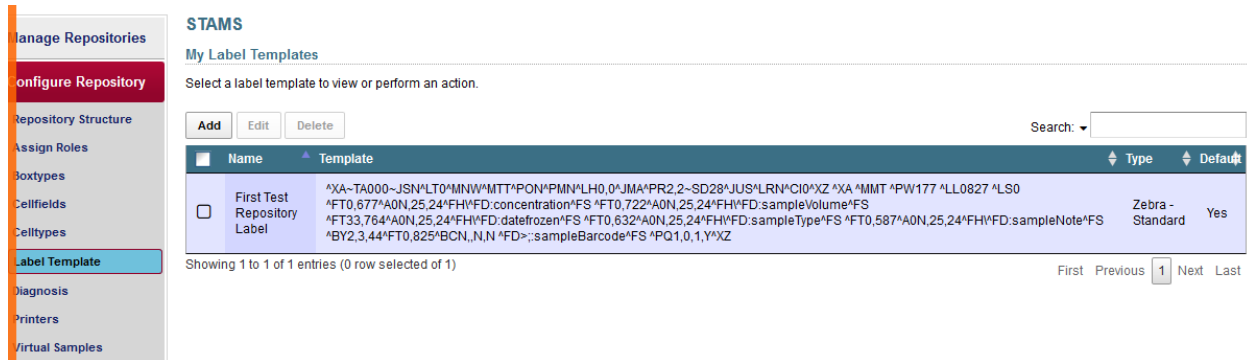
Select "Save" to add/update the printer.

4.17 Label Template (System Admin and Lab admin only)

To add a Label Template in the system, click "Label Template" left sub menu under "Configure Repository" for the selected Repository.



To add/Edit/Delete a Label Template, on the left side, selects "Label Template".



To add a new Label Template, click "Add" button from below page.

STAMS

My Label Templates

Select a label template to view or perform an action.

Search:

<input type="checkbox"/>	Name	Template	Type	Default
<input type="checkbox"/>	First Test Repository Label	^XA~TA000~JSN^LT0^MNW^MTT^PON^PMN^LH0,0^JMA^PR2,2~SD28^JUS^LRN^CI0^XZ^XA^MMT^PW177^LL0827^LS0^FT0,677^A0N,25,24^FH^FD:concentration^FS^FT0,722^A0N,25,24^FH^FD:sampleVolume^FS^FT33,764^A0N,25,24^FH^FD:datefrozen^FS^FT0,632^A0N,25,24^FH^FD:sampleType^FS^FT0,587^A0N,25,24^FH^FD:sampleNote^FS^BY2,3,44^FT0,825^BCN,,N,N^FD>::sampleBarcode^FS^PQ1,0,1,Y^XZ	Zebra - Standard	Yes

Showing 1 to 1 of 1 entries (0 row selected of 1) First Previous **1** Next Last

To edit/delete a Label Template, click "Edit" or "Delete" button from below page.

STAMS

My Label Templates

Select a label template to view or perform an action.

Search:

<input checked="" type="checkbox"/>	Name	Template	Type	Default
<input checked="" type="checkbox"/>	First Test Repository Label	^XA~TA000~JSN^LT0^MNW^MTT^PON^PMN^LH0,0^JMA^PR2,2~SD28^JUS^LRN^CI0^XZ^XA^MMT^PW177^LL0827^LS0^FT0,677^A0N,25,24^FH^FD:concentration^FS^FT0,722^A0N,25,24^FH^FD:sampleVolume^FS^FT33,764^A0N,25,24^FH^FD:datefrozen^FS^FT0,632^A0N,25,24^FH^FD:sampleType^FS^FT0,587^A0N,25,24^FH^FD:sampleNote^FS^BY2,3,44^FT0,825^BCN,,N,N^FD>::sampleBarcode^FS^PQ1,0,1,Y^XZ	Zebra - Standard	Yes

Showing 1 to 1 of 1 entries (1 row selected of 1) First Previous **1** Next Last

Enter the Label Name; Select the Type ("Zebra – Standard") and the Template (The "Template" text area above is for the text generated for the label designed using the respective printer label design software. It is entered by IT support team.) and click "Save" button to save the Template.

STAMS

[.] Label Template information

Name*

Type*

Default Yes No

Template*

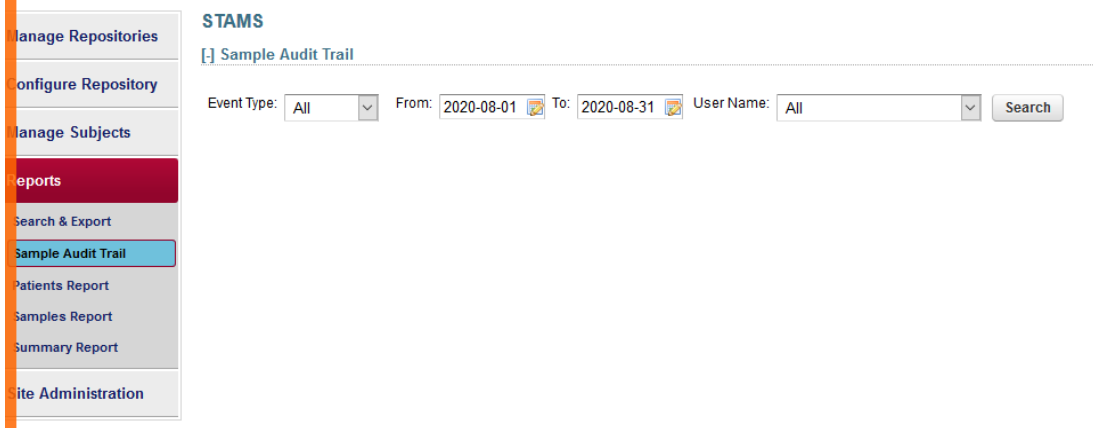
Note: The "Template" text area above is for the text generated for the label designed using the respective printer label design software.

4.18 Audit Trail (Available for all roles)

To view the sample history, click “Sample Audit Trail” left sub menu under “Report” menu for the selected Repository.



To view the sample history, on the left side, selects “Sample Audit Trail”.



Select Audit trail event type as All/create/Update/Delete, From Date, To Date information and User, and Click “Search” button to view the Sample history.

Sample History for the entire system will be displayed based on the search.

STAMS

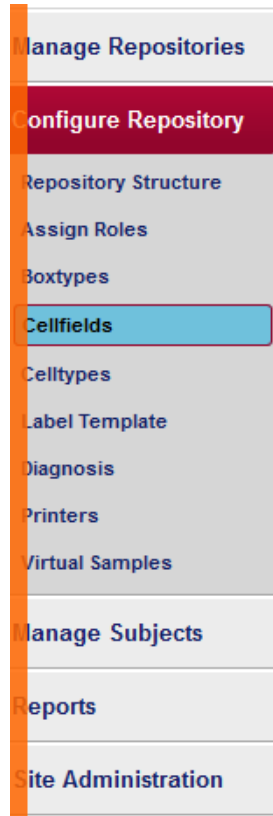
[.] [Sample Audit Trail](#)

Event Type: From: To: User Name:

Event Type	User Name:	Date	Changes
DELETE	MegMersha	2020-08-04 10:03 AM EDT	Field
			Cells Per Unit
			Passage Number
			Source
			Cell Type
			YPos
			Serial
			Date Frozen
			XPos
			Volume
			Tnssolution
			Tnsunit
			Frozen By
			Note
			Sample Barcode
Age			
DELETE	MegMersha	2020-08-04 10:03 AM EDT	Field
			Cells Per Unit
			Passage Number
			Source
			Cell Type
			YPos
			Serial
			Date Frozen
			XPos
			Volume
			Tnssolution
			Tnsunit
			Frozen By
			Note
			Sample Barcode
Age			

4.19 Cell Fields (System Admin and Lab admin only)

To set the Selected Cell fields to display for the Sample(While adding new sample in the system), click “Celltypes” left sub menu under “Configure Repository” menu for the selected Repository.



Select “Cell fields” from the Left menu and click.

It will show below page where the user can select the checkboxes of the cell fields to make it hidden. Cell type is administrative screen which provides hard and soft attributes specific to a cell. Hard attributes are required for a cell to define. Soft attributes are flexible which can be included or excluded for a cell. Cell fields UI allows system admin /Lab admin to exclude or include the soft attributes visibility on the “add or modify” sample UI fields.

Manage Repositories

Configure Repository

Repository Structure

Assign Roles

Boxtypes

Cellfields

Celltypes

Label Template

Diagnosis

Printers

Virtual Samples

Manage Subjects

Reports

Site Administration

STAMS
Select the Cell Fields to be hidden.

[+] Cell Fields

Select the Cell Fields to be hidden.
(Check/Uncheck All)

Cell Type Information

Cell/Sample Type Name

Cell Type Note

Source/Patient Sample Information

Protocol/Project Number

Date Frozen

Patient Note

Time Type

Time Frozen

Additional Sample Information

Sample Barcode

Serial No.

Cells Per Unit

Concentration

Passage Number

Sample Parent Info

Sample Processed By

Cell Type Description

Cryo Solution

Source/Patient

Frozen By

Date Collected

Time Collected

Sample Number

Position X / Y

TNS Solution

Volume

Age

Note

Sample Tracking

Sample Last Updated By

No Cell Information will be hidden

Save Reset

4.20 Projects/Protocols (System Admin)

Projects/Protocols are automatically populated or show for every user. Protocols are created and assigned at Proforms application.

4.21 Reports (Available for all roles)

To View the STAMS report click on the left side “Reports” menu. There are **Patients Report, Samples Report and Summary Report.**



This system will display Reports as shown below

STAMS
Protocol - Samples Report

Download Search:

Id	Protocol#	Patient	Cell Type	Sample Barcode
1	IK1 - SUBSTUDY	Alison McHugh	First Cell Type	400015
2	IK1 - SUBSTUDY	Alison McHugh	First Cell Type	400015
3	IK1 - SUBSTUDY	Alison McHugh	First Cell Type	400015
4	TEST STUDY JULY 7	First name 3 Last name 3	First Cell Type	400019
5	TEST STUDY JULY 7	First Animal	First Cell Type	400023
6	TEST STUDY JULY 7	First Animal	First Cell Type	400023
7	TEST STUDY JULY 7	First Animal	First Cell Type	400023
8	TEST STUDY JULY 7	First Animal	First Cell Type	400023
9	TEST STUDY JULY 7	First Animal	First Cell Type	400023
10	TEST STUDY JULY 7	First Animal	First Cell Type	400023
11	TEST STUDY JULY 7	First Animal	First Cell Type	400023
12	TEST STUDY JULY 7	First Animal	First Cell Type	400023
13	TEST STUDY JULY 7	First Animal	First Cell Type	400023
14	TEST STUDY JULY 7	First Animal	First Cell Type	400023
15	TEST STUDY JULY 7	First Animal	First Cell Type	400023

Showing 1 to 15 of 35 entries First Previous **1** 2 3 Next Last

5 ACRONYMS AND ABBREVIATIONS

STAMS: Specimen Tracking and Management System

PI : Principal Investigador

LU : Lab Usar

LA : Lab Admin

SA : System Admin