

Inspection Readiness – Generating Reports in LDMS


In the **Reports** module of the LDMS there are several reports that will support inquiries that may occur during an audit or inspection. This guidance document is not a comprehensive list of the reports available in the application. In addition, the **Data Retrieval** [Windows] and **Customer Report Builder** [Web] allows the user to design and define their own reports that are exported to a flat text file. Please refer to the **User Manual** for more information for the standard or User defined reports. See the **Resources** section at the end of the document.

Specimen Management

Specimen Processing and Specimen Log Report

These reports provides the user with a specific set of information for each of their logged specimens. Both reports will provide the user with the participant, primary/aliquot information, and Specimen/Receive dates and times for each of their specimens. The Specimen Log report includes Comments and Condition codes. The Processing report provides the user with the processing information (if available) for the given specimens, specifically the Total Cell Count, Processing Date(Primary and Aliquot), Processing Time(Primary and Aliquot), Processed By Initials, Frozen Date, and Frozen Time.

Windows

1. On the LDMS toolbar, click the **Reports** icon
2. Click on **Specimen** in the **Category** grid at the top left of the Reports screen
3. Click on **Specimen Processing Report** or **Specimen Log Report** in the Description window
4. In **Selection Criteria**, set one of more **Fields** to search
Example: **Field:** ACTG Protocol **Operator:** '=' **Value:**P1093
5. Click **Add** after each search item
6. Click the **Execute**  button on the LDMS toolbar
7. The report will generate in the Crystal Report window.

Web

1. On the LDMS menu bar, hover over **Reports** and click **Standard Reports**.
2. Select **Specimen** in the Report Categories box.
3. Select **Specimen Processing Report** or **Specimen Log Report** in the Report box.
4. Set one or more **Filter Criteria**, click **Add** after each


- Example: **Field:** ACTG Protocol **Operator:** '=' **Value:** P1093
5. Set **File Type** to PDF
 6. Click **Generate** Report

Storage

Storage Detail Report

This report will display the current storage position of specimens along with specified set of specimen information. The specimens included in the report are determined by setting search or filter criteria. The returned specimen results are then sorted and displayed by container.

Windows

1. On the LDMS toolbar, click the **Reports** icon
2. Click on **Storage** in the Category grid at the top left of the Reports screen
3. Click on **Storage Detail** in the Description
4. In **Selection Criteria**, set one of more **Fields** to search
Example: **Field:** ACTG Protocol **Operator:** '=' **Value:** P1093
5. Click **Add** after each search item
6. Click the **Execute**  button on the LDMS toolbar
7. The report will generate in the Crystal Report window.

Web


1. On the LDMS menu bar, hover over **Reports** and click **Standard Reports**.
2. Select **Storage** in the Report Categories box
3. Select **Storage Detail** in the Report box
4. Set one or more **Filter Criteria**, click **Add** after each
Example: **Field:** ACTG Protocol **Operator:** '=' **Value:** P1093
5. Set **File Type** to PDF
6. Click **Generate Report**

Shipping

Shipped Specimen Report Detail and Summary

The Shipped Specimen Report will list outgoing shipments and include Shipment number, Shipment Date, Destination, Total Number of specimens (applicable to search criteria) included in the shipment. The **Detail** report includes a specified set of specimen information. The **Summary** report only lists the total of specimens, no line listing of specimens is included.

Windows

1. On the LDMS toolbar, click the **Reports** icon
2. Click on **Shipping** in the **Category** grid at the top left of the Reports screen
3. Click on **Shipped Specimen Report – Detail** or **Shipped Specimen Report – Summary** in the Description window
4. In **Selection Criteria**, set one of more **Fields** to search
Example: **Field:** ACTG Protocol **Operator:** '=' **Value:** P1093
5. Click **Add** after each search item
6. Click the **Execute**  button on the LDMS toolbar
7. The report will generate in the Crystal Report window.

Web


1. On the LDMS menu bar, hover over **Reports** and click **Standard Reports**.
2. Select **Shipping** in the Report Categories box.
3. Select **Shipped Specimen Report – Detail** or **Shipped Specimen Report – Summary** in the Report box.
4. Set one or more **Filter Criteria**, click **Add** after each
Example: **Field:** ACTG Protocol **Operator:** '=' **Value:** P1093
5. Set **File Type** to PDF
6. Click **Generate Report**

Administration

User permissions report

This report provides the user with a summary of all the users in the LDMS and lists their current permissions within the LDMS.

Windows

1. On the LDMS toolbar, click the **Reports** icon
2. Click on **Admin** in the Category grid at the top left of the Reports screen.
3. Select **User Permissions** from the Description list
4. Click the **Execute**  button on the LDMS toolbar


Web

1. On the LDMS menu bar, hover over **Reports** and click **Standard Reports**.
2. Select **Admin** in the Report Categories box.
3. Select **User Permissions** in the Report box.
4. Set **File Type** to PDF
5. Click **Generate Report**

Transaction Log Report

This log is a historical record of all transactions performed by users in your LDMS database. Generating the report as a Comma Separated text file allows the user to easily search the contents in Excel. If you are researching the history of a specimen, use the Global Specimen ID to search for all entries relating to that specimen.

Windows

1. On the LDMS toolbar, click the **Reports** icon
2. Click on **Admin** in the Category grid at the top left of the Reports screen.
3. Select **User Permissions** from the Description list
4. Select **Transaction Log Report** in the Report box.
5. In **Selection Criteria**, for **Field** select a start date or date range
Example: **Field:** Transaction Date **Operator:** '>=' **Value**=use calendar to choose date
6. Click **Add**
7. Click the **Execute**  button on the LDMS toolbar
8. In **Crystal Reports**, export as a **Microsoft Excel (.xls)** file
9. **Open** report in **Excel** and **Review**

Web

1. On the LDMS menu bar, hover over **Reports** and click **Standard Reports**.
2. Select **Admin** in the Report Categories box.
3. Select **Transaction Log Report** in the Report box.
4. In **Filter Criteria**, at minimum set a start date or date range
Example: **Field:** Start Date **Operator:** '>=' **Value**=use calendar to choose date
5. Set **File Type** to **Microsoft Excel (.xls)**
6. Click **Generate Report**
7. **Open** report in **Excel** and **Review**

Resources

Windows

<https://www.ldms.org/resources/ldms/windows/#reports/win/reports-running-built-in-reports.html>

<https://www.ldms.org/resources/ldms/windows/#reports/win/reports-running-custom-data-retrieval-reports.html>

Web

<https://www.ldms.org/resources/ldms/web/#reports/web/reports-preset-running.html>

<https://www.ldms.org/resources/ldms/web/#reports/web/reports-custom-about.html>