

Getting Started with LDMS for PHIA

This guide outlines the steps Frontier Science recommends that laboratories follow when getting started with LDMS and the PHIA project once LDMS is installed.

More documentation for LDMS and contact information for user support can be found at www.ldms.org.

Step 1: Create use accounts

Before you can begin using LDMS, you must create accounts for your users. When LDMS is installed, a temporary ADMIN account is created. The ADMIN account should be used to create an account for your first users, after which it should be removed.

1. Log on to LDMS with the user *ADMIN* and the password *admin*.
2. On the **Administration** menu, click **User Configuration**.
3. Click **New User**.
4. In the **User Name**, **Real Name**, and **Initials boxes**, enter the information for the user.
5. Click **OK**.
6. In the **Password** boxes, enter a password for the user.

LDMS passwords are not case sensitive.
7. With the user selected in the **User ID** box, look in the **Menu Permissions** section. Click the **Full** header.

This will select all permissions available for the user.
8. (Optional) Select the **System Administrator Capabilities** check box.

Three users should be designated as system administrators. Normal laboratory users should not be system administrators.
9. On the **Database** menu, click **Save**.

Step 2: Remove the temporary ADMIN user account

After at least one user with system administrator capabilities has been created, the temporary ADMIN user account should be removed.

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1. Log on to LDMS as a user with system administrator capabilities.

Do not use the ADMIN account.
2. On the **Administration** menu, click **User Configuration**.
3. In the **User ID** box, select *ADMIN*.
4. Click **Delete**.
5. When you receive the “Are you sure you want to delete this user?” message, click **Yes**.

Step 3: Enable import as-is

Import-as-is allows you to automatically store items from LDMS shipments directly to a special import freezer in Storage Management when a shipment is received.

1. On the **Administration** menu, click **System Configuration**, and then click the **Import** tab.
2. Select the **Allow automatic storage of imported samples** check box.
3. On the **Database** menu, click **Save**.

Step 4: Enable automatic frozen date and time settings

When specimens are stored, the frozen date and time can automatically be set to the current date and time if the specimen doesn't have a frozen date or time already specified.

1. On the **Administration** menu, click **System Configuration**, and then click the **Storage** tab.
2. Select the **Set Frozen Date/Time to Current Date/Time** check box.
3. On the **Database** menu, click **Save**.

Step 5: Disable Permanent delete from storage setting

By default, if a specimen is removed from Storage Management, it will automatically be designated as “never store.” Never store means that the specimen will not be listed when assigning storage locations to specimens in Storage Management. For PHIA, this setting should be disabled.

1. On the **Administration** menu, click **System Configuration**, and then click the **Storage** tab.
2. Deselect the **Permanent Delete Default Setting** check box.
3. On the **Database** menu, click **Save**.

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Step 6: Verify that PHIA LDMS preloads are available

Preloads are specimen entry templates that will automatically fill in certain expected information based on visit criteria.

1. On the **Administration** menu, click **Define Preloads**.
2. In the **Saved Preloads** box, look for a preload that begins with your two letter country code (such as *SZ, UG, TZ*, and other country codes)
3. Verify that all expected preloads for your country are listed.

If you are missing any preloads, perform an export in LDMS. Performing an export will download any available preload changes. If you do not see the expected preload after exporting, contact LDMS User Support for assistance.

Step 7: Set label defaults

The default label setting determines format and size will be initially selected when printing specimens. Both the format and size can be changed manually when labels are generated.

1. On the **Administration** menu, click **Label Setup**.
2. In the **Group** box, select *PHIA*.
3. In the **Label Format** box, select *PHIA Barcode*.
4. In the **Label Size** list, select *Barcode Label 35*.
5. Click **OK**.
6. When you receive the “Are you sure you want to save this setting?” message, click **Yes**.

Step 8: Set printer configuration

For LDMS to generate labels and reports correct, a default printer must be specified.

1. On the **Administration**, click **Printer Configuration**.
2. In the **Report Printer** list, select the name of the printer you will use to print reports, such as shipping manifests.
3. In the **Label Printer** list, select the name of the printer you will use to print specimen labels.
4. Click **OK**.
5. If you receive a “Do you want to change your default printer?” message, click **Yes**.

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Step 9: Create a test result entry template

Before using the Test Result Entry tool, you must create a template to use.

Note: Before you can open the Test Result Entry tool, it must be activated for your laboratory by LDMS User Support.

Warning: Once a template is created, it cannot be modified.

1. On the **Tools** menu, click **Test Result Entry**, and then click the **Template** tab.
2. In the **Template Name** box, enter a name for the template.
3. In the **Group** box, select *PHIA*.
4. In the **Geenius Default Setting** and **QA Testing Schema** boxes, select the settings appropriate for your country and laboratory type.
5. In the **Test Suite** section, click **Add**.
6. In the **Test** box, select the test.
7. In the **Open for EID** box, select the setting appropriate for your country and laboratory type.

If *Y* is selected, the test will default to blank when the **VID** is *EID*.
8. (As needed) Repeat the previous steps to add more tests to the **Test Suite** section.
9. On the **Database** menu, click **Add**.

Step 10: PHIA freezer setup

New PHIA laboratories are set up as satellite laboratories. After the laboratory receives LDMS training, the satellite laboratory storage items and configurations need to be removed, and the configurations for central laboratories need to be added.

Configure “PHIA DBS Box” container

1. On the **Tasks** menu, click **Storage Management**.
2. Click the **Configuration** tab.
3. Select the **Container** option.
4. Enter the following information:

| Option | Enter or Select This Value |
|--------|----------------------------|
| Label | PHIA DBS box |

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| Option | Enter or Select This Value |
|-----------------|------------------------------|
| No. of Columns | 1 |
| No. of Rows | 24 |
| Labeling Method | Numeric Rows and Columns |
| Fill Order | Bottom to Top, Left to Right |
| Coordinates | Row, Column |

5. On the **Database** menu, click **Add**.

Configure “PHIA Plasma Box” container

1. On the **Tasks** menu, click **Storage Management**.
2. Click the **Configuration** tab.
3. Select the **Container** option.
4. Enter the following information:

| Option | Enter or Select This Value |
|---------------------|-------------------------------------|
| Label | PHIA Plasma Box |
| No. of Columns | 9 |
| No. of Rows | 9 |
| Exclusion Type | Corner(s) |
| Exclusion Selection | Lower Right |
| Labeling Method | Alphabetic Rows and Numeric Columns |
| Fill Order | Left to Right, Top to Bottom |
| Coordinates | Row, Column |

5. On the **Database** menu, click **Add**.

Configure “PHIA Rack” level

1. On the **Tasks** menu, click **Storage Management**.
2. Click the **Configuration** tab.
3. Select the **Level** option.
4. Enter the following information:

| Option | Enter or Select This Value |
|----------------|----------------------------|
| Label | PHIA Rack |
| No. of Columns | 5 |
| No. of Rows | 5 |

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| Option | Enter or Select This Value |
|-----------------|-------------------------------------|
| Labeling Method | Alphabetic Rows and Numeric Columns |
| Fill Order | Top to Bottom, Right to Left |
| Coordinates | Row, Column |

5. On the **Database** menu, click **Add**.

Configure PHIA shelf level

1. On the **Tasks** menu, click **Storage Management**.
2. Click the **Configuration** tab.
3. Select the **Level** option.
4. Enter the following information:

| Option | Enter or Select This Value | |
|-----------------|------------------------------|------------------------------|
| | Satellite Laboratory | Central Laboratory |
| Label | PHIA Shelf Satellite Lab | PHIA Shelf Central Lab |
| No. of Columns | 3 | 5 |
| No. of Rows | 1 | 1 |
| Labeling Method | Positions Only | Positions Only |
| Fill Order | Left to Right, Top to Bottom | Left to Right, Top to Bottom |
| Coordinates | Row, Column | Row, Column |

5. On the **Database** menu, click **Add**.

Configure PHIA freezer

1. On the **Tasks** menu, click **Storage Management**.
2. Click the **Freezer Cfg** tab.
3. Enter the following information:

| Option | Enter or Select This Value | |
|-------------|----------------------------|--------------------|
| | Satellite Laboratory | Central Laboratory |
| Label | PHIA Satellite Lab | PHIA Central Lab |
| Type | Freezer | Freezer |
| Temperature | -20 C | -80 C |

4. In the **Level Types** box, click and drag either the *PHIA Shelf Satellite Lab* or *PHIA Shelf Central Lab* (de-

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pending on your laboratory), and drop it to the **Configuration Design** box.

In the **Level** window, in the **Number** box, enter 4.

5. In the **Level Types** box, click and drag the PHIA Rack to the **Configuration Design** box.
6. In the **Sub Level Of** box, select the first shelf.
7. In the **Number box**, enter the appropriate number:
 - For PHIA satellite laboratories, enter 3.
 - For PHIA central laboratories, enter 5.
8. Repeat the above steps to add *PHIA Racks* to each available shelf.
9. On the **Database** menu, click **Add**.

Step 11: Remove training data

These steps must be completed *after* the laboratory receives LDMS training.

Remove existing freezers and configurations

Note: These steps only need to be completed for central laboratories. This step removes the configurations and storage items that are used for satellite laboratories.

1. On the **Tasks** menu, click **Storage Management**.
2. On the **Main View** tab for each existing freezer, do the following:
 - Select the freezer.
 - On the **Database** menu, click **Delete**.
3. Click the **Configuration** tab.
4. For each existing container and level in the **Configurations** box, do the following:
 - Select the configuration
 - On the **Database** menu, click **Delete**.

Unship training shipments

Warning: You must have the original shipping file. It must be saved in its default location on a drive with the shipment number. For example, if you are unshipping shipment number 123, the shipping file must be located at C:\123\123. If you do not have the original shipping file, contact LDMS User Support.

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1. On the **Tasks** menu, click **Shipping**, and then click the **View Shipment** tab.
2. On a shipment to be removed, right-click, and then click **Unship**.
3. When you see the “Do you have the shipping file?” message, click **Yes**.
4. In the **Select Drive** list, select the location of the original shipping file, and then click **OK**.
5. Click the **Setup** tab, and then deselect all specimens.
6. On the **Database** menu, click **Save**.
7. When you see the “Do you really want to modify this shipment” and “Do you really want to save an empty shipment” messages, click **Yes**.
8. Click the **View Shipment** tab, right-click the shipment, and then select **Delete Batch**.
9. When you see the “Do you want to delete this batch?” message, click **Yes**.

Delete training specimens

1. On the **Tasks** menu, click **Specimen Management**.
2. On the **Database** menu, click **Delete**.
3. When you see the “Are you sure you want to delete this record?” message, click **Yes**.
4. On the **Database** menu, click **Previous**.
5. Repeat the previous steps until all training records have been deleted.

Add central laboratory freezer

Note: These steps only need to be completed for *central laboratories*.

1. On the **Tasks** menu, click **Storage Management**.
2. Click the **Main View** tab.
3. On the **Database** menu, click **Add**.
4. In the **Add** window, click **FREEZER**.
5. Select the *PHIA Central Lab* freezer configuration, and then click **OK**.
6. In the **Name** box, enter a name for the freezer, and then click **OK**.

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Step 12: Check LDMS user manual

You should have the latest version of the LDMS User Manual available on the laptop in PDF. The most recent version of the user manual, as well as additional LDMS resources, can be found at www.ldms.org.