# **General Information**

LDMS

- > LDMS for the Web guides are available for Specimen Management, Storage, and Shipping.
  - Show all Reference Guides
    - discuss availability at the end of training
- LDMS for the Web is an application used to log and track specimens collected for clinical trials. These specimens will be shipped for long-term storage at the repository
- > LDMS for the Web manual is available via Help in LDMS for the web.
- > Access the application via <u>www.webldms.org</u>
  - Use Firefox, Chrome, or Internet Explorer to access the website.
    - These browsers have been tested for LDMS for the Web.
- > Login ID and password is managed by Frontier Science
  - o Temporary password is only good for 24 hours; contact Frontier Science if it needs to be reset.
  - Password standards: Uppercase Letter, Lowercase letter, number, symbol
- > Tabs for various modules: Specimen Management, Storage, Shipping, Reports, Labels, and Administration

# **User Management**

Accounts for individual users are created and maintained by LDMS User Support. To perform the following tasks, you will need to contact LDMS User Support for assistance:

- Create New User
- Reset User Password
- Manage User Access

LDMS User Support E-mail: <u>Idmshelp@fstrf.org</u> Phone: (716) 834-0900 x7311

# **Specimen Management**

The Specimen Management page allows you to manage the details of specimen records and related information for patient enrollments.

- > Each participant's information is displayed on its own page
- Scroll arrow allows you to display other participant screens; scrolling through your database one participant at a time
  - Scroll bar allows you to fast forward through your database
- > Filters (left-hand side) narrow the scope of the database
- > Use this page to view visit/sample information
  - Lab Processing Chart outlines samples expected for particular visits
    - This study has two LPCs one for ACTG sites and another for Non-Network sites
  - View visit information for a particular study:
    - Visit name (ie. 0 Ent)
    - Collection date
    - Primary samples collected from the participant (click to see aliquots associated with primary)
    - Aliquots generated during processing of the primary tubes. These aliquots are what will be stored then shipped.
  - Subsequent visits will appear on the same page (scroll through records to show an example)
    - > Point out Patient information at top
    - > Visit information mid screen
    - > **Primary grid** (only displays primaries from the highlighted visit above)
    - > Aliquot grid (only displays aliquots from the highlighted primary above)
  - Edit opens page to allow for additional detail:
    - Primary Edit; V Talk through all fields
      - Processing Tech initials/Processing Date/Processing Time
        - will cascade to the aliquots
    - Aliquot Edit; ▼ Talk through all fields
      - Frozen date/time
      - Reports can be generated to let you know if you completed all processing fields
      - Print labels
  - Global Specimen ID unique identifier; system-generated; -00, -01, 02, etc.

- Used to QA/QC shipments, prior to shipping
- Various sample codes: hover for description

# Quick Add

- 1. Select Quick Add from the Specimen Management menu bar.
- 2. Use the **Template Filters** to narrow the selection of available Templates by selecting REPRIEVE in the **Project** field
  - Templates allow for quick data entry and will populate the expected collections and derivatives

emplate	
Template Filters	
Project	
REPRIEVE	•
ID2	_
	•
Visit	
Visit Unit	
	•
Clear Filters	

- 3. Select the desired Template from the available options. Note any Template Comments.
  - The LPC notes the correct template to select, please ensure you have the correct LPC for your laboratory (ACTG or Non-Network)

Template	<b>•</b>
A5332 ENTRY	- ACTG SITES
A5332 ENTRY	- NON-NETWORK SITES
A5332 ENTRY	- VERSION 2 LPC
A5332 MONTH	12 - ACTG SITES
A5332 MONTH	12 - NON-NETWORK SITES
A5332 MONTH	12 - VERSION 2 LPC
A5332 MONTH	24 - ACTG SITES
A5332 MONTH	24 - NON-NETWORK SITES

#### 4. Enter the

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- Participant Information (PID),
- Clinic
- SID
- Draw Date (Date Collected from Participant) in the appropriate sections.
  - Prompted to cascade draw date to Received Dates for primary

Patient Information		
Project	REPRIEVE	*
PID	07897891 -	*
OPIDs		Add OPID
	OPID	
Enrollment Information		
PROTOCOL	A5332	
Visit Information		
Clinic	201 🗸	
SID	NOSID	
Draw Date	23/Apr/2015	*
Visit Value	0	Ent

- 5. Enter the following in the Primary grid for each Primary:
  - Draw Time (Time of Collection)
  - Received Time (Time received in Lab)
  - Note: copy/paste
- 6. Click Add. The Success message appears.

Note: Processing information will be added after processing takes place.

#### Printing Labels:

- 1. Click on Specimen Management and locate the record just entered, using Patient Filters.
- 2. Click the dropdown arrow at the Visit level and select Print Labels.



- 3. Select REPRIEVE in the Format box.
- 4. Select the Laser Label 6 size.
- 5. Enter the number of label spaces that you wish to **Skip**. You may need to do this if using a sheet of labels that you have used previously (i.e., missing labels).
- 6. Click Generate Labels. A PDF file that contains the labels is generated.

		0500-001N1F00-001 0222222F A5332 13/Feb/2015 09:00 BLD SST SER N/A 1.80 ML 0 Ent	0500-001N2H00-001 0222222F A5332 13/Feb/2015 09:00 BLD SST SER N/A 1.80 ML 0 Ent	0500-001N3G00-001 0222222F A5332 13/Feb/2015 09:00 BLD EDT PL1 N/A 1.80 ML 0 Ent
0500-001N4D00-001	0500-001N4D00-002	0500-001N4D00-003	0500-001N5J00-001	0500-001N6C00-001
022222F A5332	022222F A5332	022222F A5332	022222F A5332	0222222F A5332
13/Feb/2015 09:00	13/Feb/2015 09:00	13/Feb/2015 09:00	13/Feb/2015 09:00	13/Feb/2015 09:15
BLD EDT BLD N/A	BLD EDT BLD N/A	BLD EDT BLD N/A	BLD SPO PL1 N/A	URN NON URN N/A
1.50 ML 0 Ent	1.50 ML 0 Ent	1.50 ML 0 Ent	1.80 ML 0 Ent	1.00 ML 0 Ent

Note the skipped label positions.

#### Once processing has been completed:

- 7. Click Edit to complete the following information for each Primary:
  - Processing Tech Initials (cascade to all aliquots of this primary)
  - Processing Time (cascade to all aliquots of this primary)

#### Note: Processing Date and Frozen Date default to Received Date

- 8. Click SAVE.
- 9. Click the Edit button next to each Aliquot. Enter the following:
  - Frozen Date/Time (appropriate for each sample type).
  - Adjust the following, as needed:
    - Condition Code Missing aliquot, QNS, etc
    - · Comments
    - Reason Sample Not Collected
    - · Aliquot volume

10. Click Save.

# Storage

Specimen Management	Storage	Shipping	Reports	Labels	Administration

The Storage page is used to create a virtual representation of the storage structure at your lab. We will build a box, a shelf, and a Storage Structure.

### NOTES:

- Configuring these items should only need to happen one time in your lab.
- REPRIEVE samples must be stored in freezers.

### **Configuring a Storage Container Template**

- 1. Select **Container Templates** from the Storage menu bar item.
- 2. Configure the desired box specifications, indicating the following:
  - Name,
  - Number of Rows,
  - Number of Columns, and any desired order and labeling information.
- 3. Click **Save Template**. The newly-created container template will be available in the **Saved Templates** listing.

#### Storage

Container Templates									
	Saved Templates REPRIEVE Box Add New								
Template Configuration -									
Name	REPRIEVE Box *								
Number of Rows	9								
Number of Columns									
Positions Only									
Coordinate Order	Row/Column ×								
Column Labeling	Numeric v Left to Right v								
Row Labeling	Alphabetic 👻 Top to Bottom 👻								
Fill Order	Left to Right, Top to Bottom								
Excluded Positions									
Preview	·								
	B         B.1         B.2         B.3         B.4         B.5         B.6         B.7         B.8         B.9								
	C C1 C2 C3 C4 C5 C6 C7 C8 C9								
	<b>D</b> D,1 D,2 D,3 D,4 D,5 D,6 D,7 D,8 D,9								
	E E,1 E,2 E,3 E,4 E,5 E,6 E,7 E,8 E,9								
	F F.1 F.2 F.3 F.4 F.5 F.6 F.7 F.8 F.9								
	<b>G</b> G,1 G,2 G,3 G,4 G,5 G,6 G,7 G,8 G,9								
	H H.1 H.2 H.3 H.4 H.5 H.6 H.7 H.8 H.9								
	I I.1 I.2 I.3 I.4 I.5 I.6 I.7 I.8 I.9								
	Save Template Delete Template								

### Adding a Storage Unit

- 1. Select Stored Samples from the Storage menu bar item.
- 2. Select Add Storage Unit from the Actions box.



- **3.** Define the following:
  - Storage Unit Name
  - Type
  - Temperature
  - Rows (how many shelves)5
  - Columns, etc.
- 4. Click Save.

5. Click the Edit dropdown arrow to add levels (shelves) to the unit.

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new	Edit 👻
	Add New Level
	Print labels
	Delete

6. Click Add New Level and define the shelf (how many racks or boxes fit on the shelf).

new	
Create Level	
From Template	<b>v</b>
Name	shelf *
Number of Rows	1 *
Number of Columns	5 *
Positions Only	
Coordinate Order	Row/Column ~
Column Labeling	Alphabetic 👻 Left to Right 👻
Row Labeling	Alphabetic 👻 Top to Bottom 👻
Fill Order	Left to Right, Top to Bottom 💌 Reset
Excluded Positions	~
Preview	•
	1     2     3     4     5   Continue Cancel

## Adding Additional Levels to the Storage Unit

Levels and containers can be added to an existing storage unit if space permits, based on its configuration.

**Note**: If the storage unit is configured to hold 5 shelves and there are currently 5 shelves in the unit, you will not be able to add additional shelves.

New Freezer	Edit Ju
	Add New Level
	Print labels
	Delete

- Click the **Edit** selection box next to a shelf the **Storage Unit** to add additional **Levels** (shelves), if space permits in the freezer.
- Click the **Edit** selection box next to a **Shelf** to add additional **Containers**, if space permits on the shelf.

### **Storing Samples**

1. Highlight the desired box and click the Edit selection box (drop down arrow).



- 2. Select Store Samples.
- 3. Select Patient Filters to locate the new record. E.g., Project, Received Date
- 4. Specimens available to be stored will populate the Available Specimens grid.
- 5. Select the desired specimens by using **Ctrl** or **Shift** keys.
- 6. Click Add. The selected specimens populate the Selected Specimens grid
- 7. Click Continue.
- 8. Select the box position for the indicated specimen **or** click to select **Auto-fill all from selected position**. Click **Continue**.

Select Position for 0500-	001M3	K00-I	002 (	1 of 2	)—						
Position	1						*				
Preview											
		1	2	3	4	5	6	7	8	9	
		10	11	12	13	14	15	16	17	18	
		19	20	21	22	23	24	25	26	27	7
		28	29	30	31	32	33	34	35	36	
		37	38	39	40	41	42	43	44	45	
		46	47	48	49	50	51	52	53	54	
		55	56	57	58	59	60	61	62	63	
		64	65	66	67	68	69	70	71	72	
		73	74	75	76	77	78	79	80	81	
											Auto-fill all from selected position
											Continue

#### Storage

9. The samples will be stored in the designated positions within the box.

- 🧃 [A, 1] BOX 1	Edit 🔻
[ 01 ] 0500-001M3K00-002	Edit
[ 02 ] 0500-001M3K00-003	Edit 🔻

10. Click Edit for the box in which samples were just stored.

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11. Click the **Report** dropdown arrow to generate the **Container Report** to assist in the physical storage of the specimens.

	Reports 👻					
Storage Detai	il					
Container						
Empty Storag	e Locations					

# Reports

## **Generating Reports**

		Report Cat	egories	Specimen	-		
		Report		Specimen Log Report	-		
Filter Criteria							
Specimen Date	-	22/Dec/2014	- Add				
Field	Operator	Value					
Project	=	FRONTIER					Delete
Specimen Date	-	22/Dec/2014					Delete
		File Type	PDF (*.pd	f) erate Report		¥	

- 1. Click Reports on the LDMS for the Web menu bar.
- 2. Select a category in the Report Categories box.
- 3. **Select** a report in the **Report** box.
- 4. Add one or more filters to narrow down the information to be displayed on the report.
- 5. File type should be set to .PDF.
- 6. Click **Generate Report.** The report will be generated in the designated format. You may need to open or download the report, depending on your web browser's default.

Specimer Specimer	1 Processi	ing Rep g Report	ort	$\geq$	Se RE Re	arch by PRIEVI ceived	e and Date						
PID/ID1 0123456B	Project/Prot REPRIEVE A5332	-	SID/II A533	<b>D3</b> 21234L	<b>VIC</b> 0.0	) 0 Ent	Clinic A001	OPID					
Primary Spec ID	Global Spec ID	Other Spec ID	PRI	ADD	Volume	Spec Date	Spec Time	Rec Date	Rec Time	Total Cell Count	Proc Date	Proc Time	Proc By
	0500-001MXB00-000		BLD	SST	20.00 ML	12/Feb/2015	11:12	12/Feb/201	5		12/Feb/2015		
Aliq Spec ID	Global Spec ID	Other Spec ID	DER	Sub A/D	Volume	Grp/Prot			Frozen Date	Frozen Time	Proc Date	Proc Time	Proc By
	0500-001MXB00-001		SER	N/A	1.00 ML	REPRIEV	E A5332		12/Feb/2015		12/Feb/2015		
	0500-001MXB00-002		SER	N/A	1.00 ML	REPRIEV	E A5332		12/Feb/2015		12/Feb/2015		
	0500-001MXB00-003		SER	N/A	1.00 ML	REPRIEV	E A5332		12/Feb/2015		12/Feb/2015		
	0500-001MXB00-004		SER	N/A	1.00 ML	REPRIEV	E A5332		12/Feb/2015		12/Feb/2015		
	0500-001MXB00-005		SER	N/A	1.00 ML	REPRIEV	E A5332		12/Feb/2015		12/Feb/2015		

# Specimens Not in Storage Report

Specimer	ns Not in Stor	age Repor	5								
Sectored on: P	FOR THE AS332										
Specimen ID	Global Spec ID	Pid/ID1	Spec Date	Pri	Add	Der	Sub A/D	VID	Volume	Condition	Status
	0500-001M1J00-001	07897891	16/Apr/2015	BLD	SST	SER	N/A	0.00 Ent	1.80 ML	SAT	Not Stored
	0500-001M2F00-00	07897891	16/Apr/2015	BLD	SST	SER	N/A	0.00 Ent	1.80 ML	SAT	Not Stored
	0500-001M3K00-00	07897891	16/Apr/2015	BLD	EDT	PL1	N/A	0.00 Ent	1.80 ML	SAT	Not Stored
	0500-001M4B00-00	07897891	16/Apr/2015	BLD	EDT	BLD	N/A	0.00 Ent	1.50 ML	SAT	Not Stored
	0500-001M4B00-00	07897891	16/Apr/2015	BLD	EDT	BLD	N/A	0.00 Ent	1.50 ML	SAT	Not Stored
	0500-001M4B00-00	07897891	16/Apr/2015	BLD	EDT	BLD	N/A	0.00 Ent	1.50 ML	SAT	Not Stored
	0500-001M5G00-00	07897891	16/Apr/2015	BLD	SPO	PL1	N/A	0.00 Ent	1.80 ML	SAT	Not Stored
	0500-001M6A00-00	07897891	16/Apr/2015	URN	NON	URN	N/A	0.00 Ent	1.00 ML	SAT	Not Stored
	0500-001M7D00-00	07897891	16/Apr/2015	BLD	SST	SER	N/A	12.00 Mo	1.80 ML	SAT	Not Stored
	0500-001M8H00-00	07897891	16/Apr/2015	BLD	SPO	PL1	N/A	12.00 Mo	1.80 ML	SAT	Not Stored

# Shipping

### **Creating New Shipments**

- 1. Click on the **Shipping** menu bar item. The **Pending Shipments** page displays.
- 2. Select Create Shipment in the Actions box.

Add New	-
Create Shipment	

The Pending Shipment Preview window opens.

					Create Shipment	
General	Shipping Des	tination	Contact at Sending Lab	Shipment Notes	Shipment Contents	
Shipment	Date	24/Jan	/2015 💌	*		
Format		LDMS	~	*		
Temperatu	ire	Dry Ic	el 💌	*		

- 3. On the General tab, complete the **Shipment Date**, **Format**, and **Temperature** fields.
- 4. Click on the **Shipping Destination** tab.
  - Type 999 in the Lab Number field to locate Biomedical Research Institute (BRI), the destination for REPRIEVE shipments.
  - Select the **Contact Person** for the shipment.

			Create Shipment	
General	Shipping Destinat	tion Contact at Sending Lab	Shipment Notes Shipment Contents	
		Conta	act 🍥 Lab Number 🔿 Lab Name 🔿 New Lab	
	999	Biomedical Research Insti	itute. (BRI) 👻	
-Shipping (	Destination			
Lab Nam	e B	iomedical Research Institute. (		Delete Destination
Lab Num	ber 9	99		
LIMS Type	e Li	DMS 👻		
Address I	Line 1 1	2264 Wilkins Avenue, Bay F		
Address I	Line 2			
City	R	tockville		
State	М	D		
Zip Code	2	0852		
Country	U	Inited States		
- Contact In	formation			
Contact P	Person J	ohn Ward		Delete Contact
Room Nu	imber			
Phone Nu	umber (3	301) 881-7636		
Fax Num	ber (3	301) 770-9811		
E-mail	bi	rirepository@aol.com		
L				
			Ship Save Close	

- 5. Click on the **Contact at Sending Lab** tab and complete the information: **Name**, **Phone Number**, and **E-mail**.
- 6. Enter any desired Shipment comments on the Shipment Notes tab.

### **Adding Storage Containers**

1. Click to open the Shipment Contents tab.

General	Shipping De	stination	Contact at Sending Lab	Shipment Notes	Shipment Contents			
Shipping Bo	oxes							Add New
Rows	Columns	Labeling (	Drder	Labeling Method		Fill Order		
4							•	
Storage Co	ntainers							Add New
Contain	er							
Batch Sto	rage Report	Shipping	Container Report	int Labels				

2. Click Add New above the Storage Containers grid. The available Storage Containers appear.

	Storage Containers
K	< 1-6 of 7 (Page 1 / 2 ) > >
🖃 🖀 -80 FREEZER	View Error Report Unavailable
E [ 01 ] ACTG SHELF	View Error Report Unavailable
E 02 ] HPTN//TN SHELF	View Error Report Unavailable
E 03 ] WIHS/MACS SHELF	View Error Report Unavailable
E 04 ] MISC GROUPS SHELF	Select
E C 05 SHELF 5	Select
E . [ 01 ] RACK 1	Select
[ 01 ] SHIPPED SAMPLES	Select
[ 02 ] REPRIEVE BOX 1	Select
[ 03 ] REPRIEVE BOX 2	Select
	Select
[ 03 ] RACK 3	Select
[ 04 ] RACK 4	Select

3. Locate the desired storage container and click **Select** to add the Container to the shipment. The selected storage container will display in the **Pending Shipment Preview**.

**Note**: If adding multiple containers, it will be necessary to click Add New and locate each container separately.

### Shipping

Rows					Add Nev
	Columns	Labeling Order	Labeling Method	Fill Order	Sort O
•					•
rage Co	ntainers				Add Nev
Contain	er				
-80 FR	EEZER / SHE	LF 5 / RACK 1 / REPRI	EVE BOX 1		Remove 💌
-80 FR	EEZER / SHE	ELF 5 / RACK 1 / REPRI	EVE BOX 2		Remove 💌
atch Sto	rage Report	Shipping Container Rep	ort Print Labels		

4. Scroll down. Click **Save** to save the batch. The new batch will appear in the **Pending Shipments** listing.

### **Generating Shipping Reports**

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1. Click Edit/Ship drop down arrow on the batch in the Pending Shipments listing.



2. Select the **Batch Storage Report**. File type should be set to **.PDF** and click **Generate Report**.

Batch Stora	ige Report											
Batch No. 138	Setup Date: 13/Feb/;	2015										
Specimen ID	Global Spec ID	Other Spec ID	Group/Prot	PID/ID1	VID	Spec Date	Spec Time	Prim	Add	Der	Sub A/D	Volume
Storage Location:	0500-001N1F00-001 REPRIEVE FREEZE	R / A5332 Rack	REPRIEVE A5332 / Serum / 001	0222222F	0.00 Ent	13/Feb/2015	9:00	BLD	SST	SER	N/A	1.80 ML
Storage Location:	0500-001N2H00-001 REPRIEVE FREEZE	R / A5332 Rack	REPRIEVE A5332 / Serum / 002	022222F	0.00 Ent	13/Feb/2015	9:00	BLD	SST	SER	N/A	1.80 ML

- 3. Next, repeat steps and select the **Shipping Container Report**. File type should be set to **.PDF** and click **Generate Report**.
  - Shipping Container Report Batch Number: 138 Legend: Add Der Specimen/Han Other Spec ID PID/ID1 Box Size: 9 X 9 Sorted by 6 Shipping Box: Ser X 0
- 4. Save this report, a printed copy should be included in the shipment

### **Performing Shipment QA/QC**

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Batch Number	Shipment Format	Destination Lab	Shipment Temperature	Setup Date	Ship Dat
119	LDMS	999	Dry Ice	26/May/2015	26/May, Edit/Ship 💌
					Generate Manifest Batch Storage Report Shipping Container Report Print labels
					QA/QC QA/QC report
					Delete

1. Click the Edit/Ship dropdown arrow to select QAQC. The QAQC Entry window opens.

#### Shipping

										,	
3ele onta	ct a co ainer 1	ontaine of 1	er	A	5332 L	IRINE			*		
	Α	в	С	D	Е	F	G	н	Т	Dealthea (Deau(Oelarea))	
1	2									Clobal Speaimen ID	1,A
2	:				-	-				Scanned Global	JE00000E-01
-		_	_	_	_				-	Specimen ID	null
3										Performed By	
4										Other Specimen ID	
5						_				Comments	
-		_	_	_	_				-	Specimen ID	500\15000010
6										Primary	URN
7										Additive	NON
8		-	-							Sub Add/Dor	N/A
-									-	Broject	DEDDIEVE
9										ID1	09999991
D			(414.0			:	- (	-		ID2	A5332
Pas	is spe	cimen	(AII+P	<u> </u>	-all Sp	ecime	n (Ait+	+)		Draw Date	10/Mar/2015
Fill C	Order			То	p to B	ottom,	Left to	Right		Draw Time	08:55
Cont	tainer	Туре		St	orage					Time	null null
										Visit	0 Ent
										Volume	1 ML

 Ensure the specimen in the physical location in the box agrees with the information displayed in the QAQC Entry window. Pass Specimen, if they agree. Fail Specimen, if they do not. Click Save. Generate the QAQC report, if desired.

#### **Creating the Shipping File**

1. Click the Edit/Ship button for the batch in the Pending Shipments list.

Ship Save Close

2. At the bottom of the **Pending Shipment Preview** page, scroll down, and click **Ship**, Click **OK**. The shipment message appears and the shipping file generates. **Save** the shipping file to the desired location.



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This file must be sent to the Receiving lab. For shipments to BRI (Lab 999) this file should be emailed to the laboratory <u>brirepository@afbr-bri.com</u>.

#### **Generating the Manifest Report**

- 1. Select **Shipment History** in the Shipping menu listing.
- 2. Click the **View** button dropdown arrow and select **Generate Manifest**.
- 3. File type should be set to .PDF. Click Generate Report. Save the report to the desired location.
- 4. A printed copy of this report must be included in the shipment

Note: Report displays QAQC Complete

#### Shipping Manifest Batch Number: 119 QA/QC Complete Setup Date: 26/May/2015 Shipped: Yes Ship Date: 26/May/2015 Shipped From: Shipped To: Lab ID: Lab ID: 999 Biomedical Research Institute. (BRI) 12264 Wilkins Avenue, Bay F Lab Name: Lab Name: 20852 Rockville United States MD Country: Country: Contact: Contact: John Ward (301) 881-7636 Phone #: Phone #: (301) 770-9811 Fax #: Fax #: brirepository@aol.com E-mail: E-mail: Number of Specimens 1 Comments: Shipping Manifest Box Name: A5332 URINE Batch Number: 119 Setup Date: 26/May/2015 Shipped: Yes Ship Date: 26/May/2015 Spec Date or Spec Sub Spec ID Global Spec ID Group/Prot PID/ID1 VID Clinic Harvest Date Time Prim Add Der A/D Volume Pos 500V15000010 JEQ006DL-01 REPRIEVE A53320999999L 0 Ent 201 10/Mar/2015 08:55 URN NON URN N/A 1 ML 1, A