



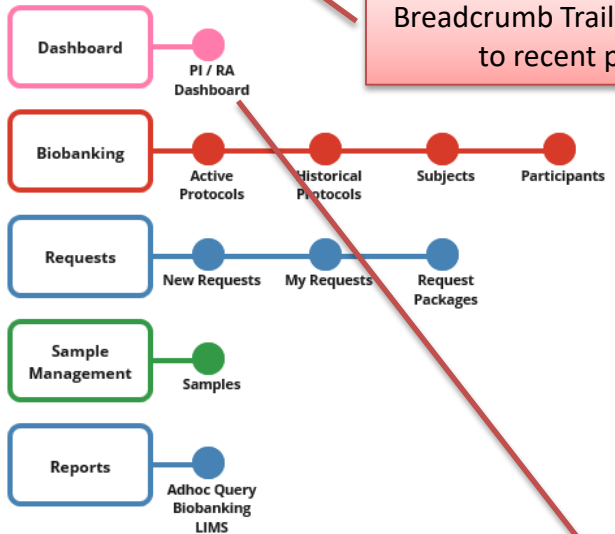
# LabVantage User Manual: Reporting Features

- Sample Family
- Sample Lifecycle
- Searching & Viewing Data
- Creating Reports

# Navigating the Database



Add Subject / Subject List / LIMS Menu

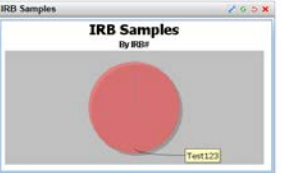
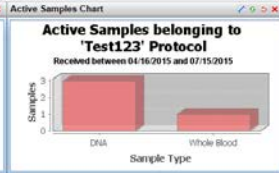
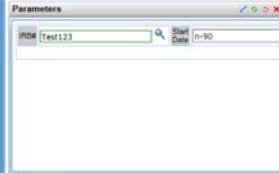
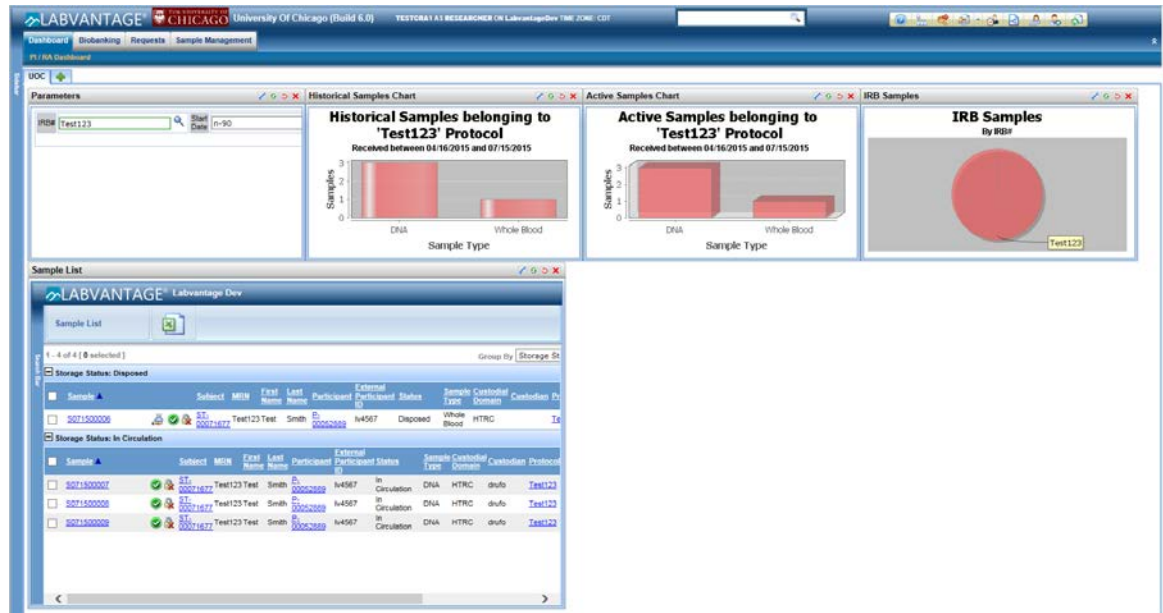


Breadcrumb Trail – takes you back to recent prior pages

Click on any of the tramstops to access that page

Change password Or Log off










The PI/RA Dashboard provides you with an overview of your IRB protocols



Sample ID	Subject	MRN	TEST Name	Last Name	Participant ID	External Participant ID	Status	Sample Type	Container	Protocol
3021500009	00211672	Test123 Test	Smith	0002369	0002369	0002369	Disposed	Whole Blood	HTRC	Test123
3021500007	00211672	Test123 Test	Smith	0002369	0002369	0002369	In Circulation	DNA	HTRC	drufs Test123
3021500006	00211672	Test123 Test	Smith	0002369	0002369	0002369	In Circulation	DNA	HTRC	drufs Test123
3021500008	00211672	Test123 Test	Smith	0002369	0002369	0002369	In Circulation	DNA	HTRC	drufs Test123


# Understanding The Sample Family

- LabVantage uses the concept of a sample family to organize specimens and samples. A sample family consists of a parent sample (this is the specimen, e.g., whole blood or tonsil) and its child samples (these are the samples that came from the parent, e.g., plasma or OCT tumor)

Sample	Subject	MRN	First Name	Last Name	Participant	External Participant ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol
<input type="checkbox"/> <a href="#">S091500009</a>	   <a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Consumed	Whole Blood	HTRC		<a href="#">Test123</a>
<input type="checkbox"/> <a href="#">S091500010</a>	  <a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>
<input type="checkbox"/> <a href="#">S091500011</a>	  <a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>
<input type="checkbox"/> <a href="#">S091500012</a>	  <a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		PBMC	HTRC		<a href="#">Test123</a>

Parent Sample

Child Samples

- You can tell which samples are parents by looking for the beaker icon: 
- Hint: parent samples will have a status of disposed and a disposition of consumed

# Understanding The Sample Family

If you would like to view further information on the Sample Family, check the box next to the parent sample, then click on the Navigators button and select Sample Navigator

LIMS Menu / Sample List

List Control View as PDF View as Excel Picklist Search Navigators

Search By Study i

[ 0 selected ] 1 - 8 of 8 (8 of 50) Group By None

Sample	MRN	First Name	Last Name	Participant	External Participant
<input checked="" type="checkbox"/> 5071900010	00112233	Minnie	Mouse	P-00077736	
<input type="checkbox"/> 5071900011	00112233	Minnie	Mouse	P-00077736	
<input type="checkbox"/> 5071900012	00112233	Minnie	Mouse	P-00077736	
<input type="checkbox"/> 5071900013	00112233	Minnie	Mouse	P-00077736	
<input type="checkbox"/> 5071900014	00112233	Minnie	Mouse	P-00077736	
<input type="checkbox"/> 5071900015	00112233	Minnie	Mouse	P-00077736	
<input type="checkbox"/> 5071900016	00112233	Minnie	Mouse	P-00077736	

# Understanding The Sample Family

From here you can view the Sample Detail Report or see the Family Tree

The screenshot displays a LIMS interface for editing sample details. The breadcrumb trail is 'LIMS Menu / Sample List / Edit Sample S071900010 Details'. The 'Navigator' pane on the left shows a tree structure under 'S071900010' with a sub-section 'Child Samples' containing six items: S071900011, S071900012, S071900014, S071900015, and S071900016. A red bracket groups these items with the text 'Family Tree'. The main content area has two tabs: 'Sample History Report' and 'Sample Detail Report', with the latter highlighted by a red box. Below the tabs is a table with columns: Sample, Sample Attributes, Received Tissue Details, Received Fluid Details, Histology, Audit, and Comm. The table contains the following data:

Sample	Sample Attributes	Received Tissue Details	Received Fluid Details	Histology	Audit	Comm
Sample Id	S071900010	Protocol ID	98Testing			
Status	Disposed	Disposition	Consumed			
Container Type	LavenderTube-EDTA	Current Quantity	0.000ml			
Current Width		Current Height				
Collection Site	_P524	Specimen Received Date & Time	7/26/19 9:08 AM			
Disease						
Surgical Pathology Number	<input type="text"/>	Parent Sample ID	S071900013			

At the bottom of the interface, there are additional tabs: Attributes, Auxiliary Studies, Aliases, Treatments, Procedures, Comments, Discrepancies, and Pare.

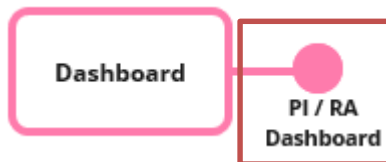
# Understanding Sample Lifecycle

- The status of a sample, in combination with disposition and custodial domain, explains where the sample is in the sample lifecycle
- The below chart will help you understand if the sample is stored in the HTRC, has been picked up and is no longer in the HTRC's storage, or if a sample was not banked due to adverse conditions

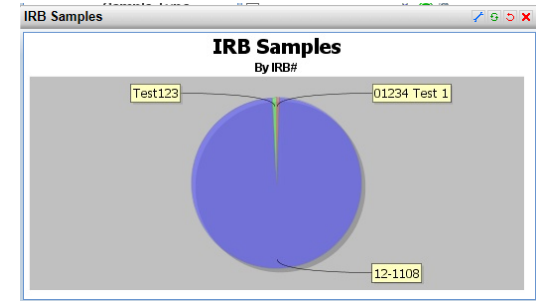
Status	Disposition	Custodial Domain	Meaning
In Circulation	n/a	HTRC	Stored in biobank
In Circulation	n/a	Transit	Sample was previously withdrawn from the biobank
3 <sup>rd</sup> Party Transfer	n/a	HTRC	Sample was picked up same day (ie. fresh tissue picked up same day)
In Prep	n/a	HTRC	Sample is being processed and is not ready to be dispersed/stored
Disposed	Rejected	HTRC	This is a sample that was created automatically by the software and there was not enough biospecimen to fulfill it
Disposed	Specific Reason	HTRC	These are samples that were not banked for specific reasons, like "entirely submitted for diagnostics"
Disposed	Consumed	HTRC	This is a parent sample that was consumed in order to create child samples

# Accessing Data- Dashboard

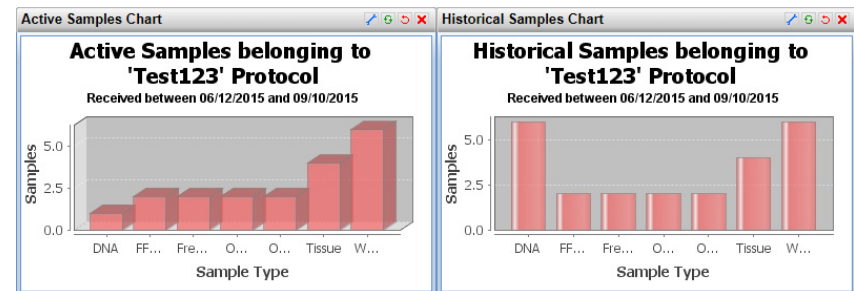
- Now that you understand the concept of the sample family and the sample lifecycle, it is time to learn how to view data and create reports
- There are many ways to view your data within LabVantage. The easiest way to see a overview of your data is to utilize the PI/RA Dashboard



- You can click on the slice of the pie graph you're interested in to view all of the data associated with that protocol

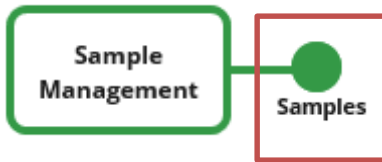


- You can also click on the bar graphs to see specific data on sample types



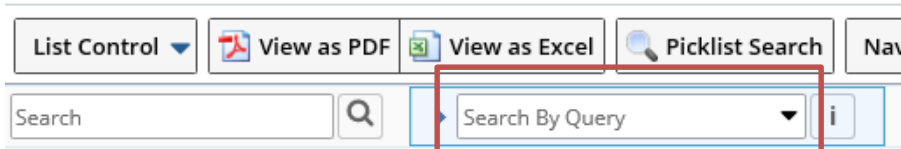
# Searching and Viewing Data

- Alternately, if you are looking for specific data or more complex searching ability, go to the Samples Tramstop



- The Search By Query option works well for quick and simple searches, like looking for all samples from a patient with a specific MRN or looking for all samples banked under a specific IRB protocol number

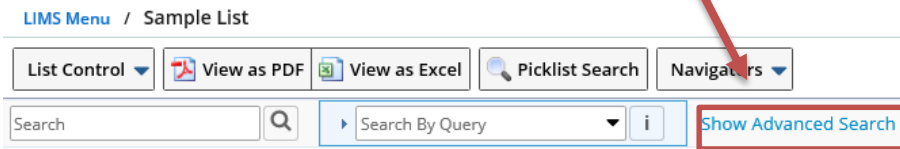
- From this page, you can do a quick search using the Search By Query options



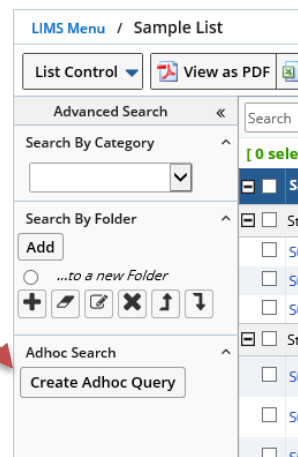


# Searching and Viewing Data

- Alternatively, you can do a more complex search by using the Create Adhoc Query feature
- Click on Show Advanced Search to open the side bar
- The Adhoc Query option works well for more complicated searches, like searching for all DNA samples collected for a specific protocol that were previously withdrawn



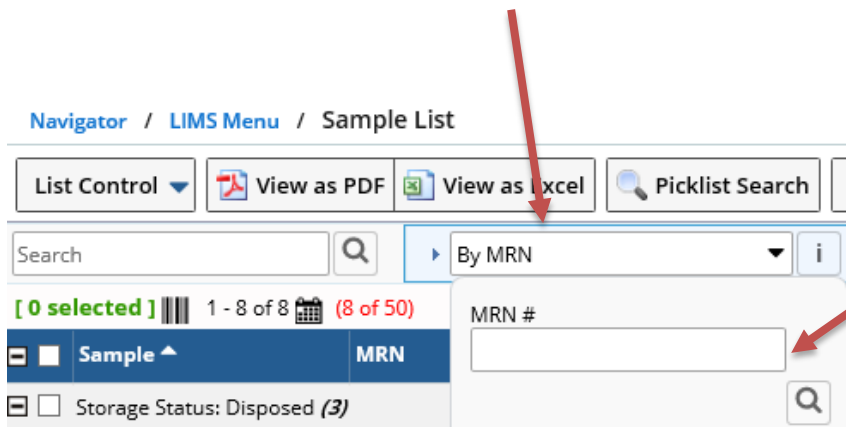
- Then click on the “Create Adhoc Query” button



# Searching and Viewing Data: Search by Query

## Using the Search By Query Option

- Let's say you want to view all samples collected for a specific patient:
  - “Joe Test”
  - MRN= 45689996
- Select the Search By Query Option for MRN



The screenshot shows a web interface for a LIMS system. At the top, there is a breadcrumb trail: "Navigator / LIMS Menu / Sample List". Below this, there are several buttons: "List Control" (with a dropdown arrow), "View as PDF" (with a PDF icon), "View as Excel" (with an Excel icon), and "Picklist Search" (with a magnifying glass icon). A red arrow points to the "View as Excel" button. Below the buttons, there is a search bar with a magnifying glass icon. To the right of the search bar, there is a dropdown menu currently set to "By MRN". A red arrow points to the search field within this dropdown menu. Below the search bar, there is a table with columns "Sample" and "MRN". The table shows "1 - 8 of 8" items, with "(8 of 50)" in red text. The first row is highlighted in blue. Below the table, there is a filter for "Storage Status: Disposed (3)".

Type 45689996 into the search field and click the magnifying glass to view the search results

# Searching and Viewing Data: Search by Query

- Here are the search results:

1 - 5 of 5 [ 0 selected ] Group By   Select All  Collapse All

**Storage Status: Disposed**

Sample	Subject	MRN	First Name	Last Name	Participant	External Participant ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol	Reserved Storage Path	Storage Path	Collection Site
<input type="checkbox"/> <a href="#">S091500009</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Consumed	Whole Blood	HTRC		<a href="#">Test123</a>			SS-00001212
<input type="checkbox"/> <a href="#">S091500029</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Other (Please refer to notes field)	Tissue	HTRC		<a href="#">Test123</a>			SS-00000031

**Storage Status: In Circulation**

Sample	Subject	MRN	First Name	Last Name	Participant	External Participant ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol	Reserved Storage Path	Storage Path	Collection Site
<input type="checkbox"/> <a href="#">S091500010</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		<a href="#">/freezer1/s2/r1/d1/p1/B071500019/A4</a>	
<input type="checkbox"/> <a href="#">S091500011</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		<a href="#">/freezer1/s2/r1/d1/p1/B071500019/A5</a>	
<input type="checkbox"/> <a href="#">S091500012</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		PBMC	HTRC		<a href="#">Test123</a>		<a href="#">/freezer1/s2/r1/d1/p1/B071500019/A6</a>	

- Try to change the Group By option to None. This will change the order in which your samples are displayed. Now, you should be able to view a parent sample with its children together

1 - 5 of 5 [ 0 selected ] Group By

Sample	Subject	MRN	First Name	Last Name	Participant	External Participant ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol	Reserved Storage Path	Storage Path	Collection Site
<input type="checkbox"/> <a href="#">S091500009</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Consumed	Whole Blood	HTRC		<a href="#">Test123</a>			SS-00001212
<input type="checkbox"/> <a href="#">S091500010</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		<a href="#">/freezer1/s2/r1/d1/p1/B071500019/A4</a>	
<input type="checkbox"/> <a href="#">S091500011</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		<a href="#">/freezer1/s2/r1/d1/p1/B071500019/A5</a>	
<input type="checkbox"/> <a href="#">S091500012</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		PBMC	HTRC		<a href="#">Test123</a>		<a href="#">/freezer1/s2/r1/d1/p1/B071500019/A6</a>	
<input type="checkbox"/> <a href="#">S091500029</a>	<a href="#">ST-00075654</a>	456889996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Other (Please refer to notes field)	Tissue	HTRC		<a href="#">Test123</a>			SS-00000031

# Searching and Viewing Data: Search by Query

- Our search results show that there were 2 parent samples banked for Joe Test:

1 - 5 of 5 [ 0 selected ] Group By None ▼

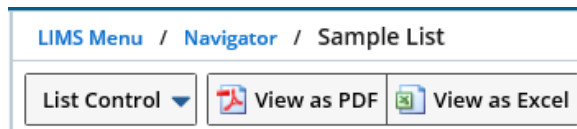
Sample	Subject	MRN	First Name	Last Name	Participant	External Participant ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol	Reserved Storage Path	Storage Path	Collection Site
<input type="checkbox"/> <a href="#">S091500009</a>	<a href="#">SI-00075654</a>	45688996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Consumed	Whole Blood	HTRC		<a href="#">Test123</a>			SS-00001212
<input type="checkbox"/> <a href="#">S091500010</a>	<a href="#">SI-00075654</a>	45688996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		/freezer1/s2/r1/d1/p1/B071500019/A4	
<input type="checkbox"/> <a href="#">S091500011</a>	<a href="#">SI-00075654</a>	45688996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		/freezer1/s2/r1/d1/p1/B071500019/A5	
<input type="checkbox"/> <a href="#">S091500012</a>	<a href="#">SI-00075654</a>	45688996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		PBMC	HTRC		<a href="#">Test123</a>		/freezer1/s2/r1/d1/p1/B071500019/A6	
<input type="checkbox"/> <a href="#">S091500029</a>	<a href="#">SI-00075654</a>	45688996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Other (Please refer to notes field)	Tissue	HTRC		<a href="#">Test123</a>			SS-00000031

- The first parent sample is a whole blood sample that has 3 children, 2 plasma samples and 1 PBMC sample
- The second parent sample is a tissue sample that was not banked, with the reason being “Other.” To view the reason why it was not banked:
  - Check the box next to the sample
  - Press the drop-down menu on the Navigators button
  - Choose Sample Navigator
  - Click on the comments tab

Sample	Sample Attributes	Received Tissue Details	Received Fluid Details	Histology	Audit	Comments	Cus
Processing Instructions							
Notes		The tissue was entirely submitted for diagnosis					

# Searching and Viewing Data: Search by Query

- You can export the information displayed from the search by clicking either View as PDF or View as Excel



- You can click on the hyperlinks to view additional information

1 - 5 of 5 [ 0 selected ] Group By: None [v]

Sample	Subject	MRN	First Name	Last Name	Participant	External Participant ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol	Reserved Storage Path	Storage Path	Collection Site
<input type="checkbox"/> <a href="#">S091500009</a>	<a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Consumed	Whole Blood	HTRC		<a href="#">Test123</a>			SS-00001212
<input type="checkbox"/> <a href="#">S091500010</a>	<a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		/freezer1/s2/r1/d1/p1/B071500019/A4	
<input type="checkbox"/> <a href="#">S091500011</a>	<a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		Plasma	HTRC		<a href="#">Test123</a>		/freezer1/s2/r1/d1/p1/B071500019/A5	
<input type="checkbox"/> <a href="#">S091500012</a>	<a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		In Circulation		PBMC	HTRC		<a href="#">Test123</a>		/freezer1/s2/r1/d1/p1/B071500019/A6	
<input type="checkbox"/> <a href="#">S091500029</a>	<a href="#">ST-00075654</a>	45689996	Test	Joe	<a href="#">P-00057462</a>		Disposed	Other (Please refer to notes field)	Tissue	HTRC		<a href="#">Test123</a>			SS-00000031

\*\*Remember that parent samples will have the beaker icon

# Searching and Viewing Data: Search by Query

- If you click on the sample number hyperlink, it will open up the sample details
- Here are the details for a parent specimen, S081900249
- You can click on the Sample Detail Report, for even more details

View Sample S081900249 Details

Sample	Sample Attributes	Received Tissue Details	Received Fluid Details	Histology	Audit	Comments	Custody	Package Acknowledgement
Sample Id	S081900249	Protocol ID	98Testing	SMS Subject Id	ST-00094042			
Status	Disposed	Disposition	Consumed					
Container Type	LavenderTube-EDTA	Current Quantity						
Current Width		Current Height						
Collection Site	_P524	Specimen Received Date & Time	8/27/19 11:05 AM					
Disease		Parent Sample ID	S081900254					
Surgical Pathology Number	<input type="text"/>							

Attributes	Auxiliary Studies	Aliases	Treatments	Procedures	Comments	Discrepancies	Par
OD 260							
260/280							
DNA Concentration							
Cell Concentration							
Cell Viability							
Specific Tissue Location							
DNA Concentration Units	ng/ul						

**Sample Detail**

**Sample S081900249**

Description

Notes

**Sample Attributes**

Protocol	98Testing	SampleID	S081900249
Storage Status	Disposed	GLP	N
SampleType	Whole Blood	Prep Type	
Pooled		Container	LavenderTube-EDTA
Mass/Volume		Concentration	
Conditional Approval		Data Restrictions	N
Disposition Status	Consumed		

**Custody Information**

Location/Package		Custodial Domain	HTRC
Custodian		COC	N

**Clinical Information**

Restriction Class ID		Consent	
Participant ID	P-00077761	Site	SS-00001706
External Participant ID		Event	
Species		Subject	ST-00094042
Collection Method		Collection Date	8/27/19 11:05 AM

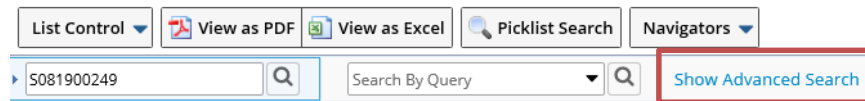
# Searching and Viewing Data: Search by Query

- Here are some of the most common Search by Query elements:
  - By MRN
    - Search by MRN
  - By Last Name
    - Search by last name
  - By Protocol
    - Search by IRB protocol number
  - By Protocol and Sample Type
    - Search by IRB protocol number and sample type (i.e. Plasma or FFPE tumor)
  - Paired Samples by Protocol
    - Search for paired samples (e.g., tumor and normal from same parent sample) collected under a specific IRB protocol

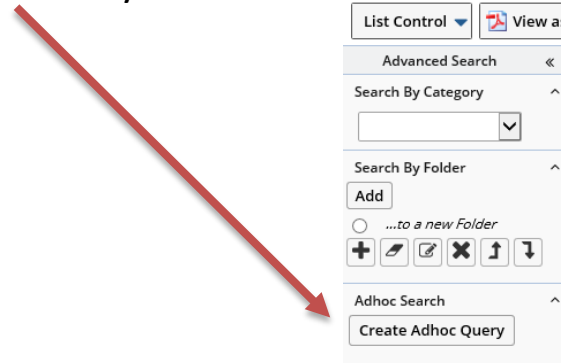
# Searching and Viewing Data: AdHoc Query

## Using the AdHoc Query Option

- Adhoc Queries work better than Search By Queries for more complicated searches
- Let's say you want to view all samples that were collected for the IRB protocol "98Testing" between the dates of 8/1/2019 - 8/31/2019
- From the Samples page, select "Show Advanced Search"



- On the left panel press the "Create Adhoc Query" button.





# Searching and Viewing Data: AdHoc Query

Since you want to look for samples that are in the protocol "98Testing" *and* were received between 8/1/2019 to 8/31/2019, you should select Meet ALL of the criteria

Adhoc Query

Search Now Count Results Save Query Delete Query Close

Sample

- Sample
- Sample Type
- Notes
- Disposal Date
- Received By
- Sample Family
- Study Site
- Collection Date
- Received Date**
- Subject

Select A Saved Query: (New Query)

Meet  All  Any

Protocol is 98Testing

Received Date between 08/01/2019 3:27 PM 08/31/2019 3:27 PM

New Criteria Group

You would include protocol and received date (use the received date from the sample family node) in the criteria group

# Searching and Viewing Data: AdHoc Query

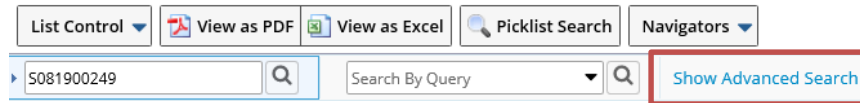
- Once you've created your AdHoc query, hit Search Now to view results
- Select specific samples or all and export this page as a PDF or to Excel

Sample	MRN	First Name	Last Name	Participant	External Participant ID	Sample Family ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol	Reserved Storage Path	Storage Path	Collect
<input type="checkbox"/> 5081900118	00112233	Minnie	Mouse	P-00077736		SF-190814-00001	Disposed	Consumed	Whole Blood	HTRC		98Testing			SS-0000
<input type="checkbox"/> 5081900119	00112233	Minnie	Mouse	P-00077736		SF-190814-00001	In Circulation		Plasma	HTRC		98Testing			
<input type="checkbox"/> 5081900120	00112233	Minnie	Mouse	P-00077736		SF-190814-00001	In Circulation		Plasma	HTRC		98Testing			
<input type="checkbox"/> 5081900121	00112233	Minnie	Mouse	P-00077736		SF-190814-00001	In Circulation		Plasma	HTRC		98Testing			
<input type="checkbox"/> 5081900122	00112233	Minnie	Mouse	P-00077736		SF-190814-00001	In Circulation		Buffy Coat	HTRC		98Testing			
<input type="checkbox"/> 5081900123	00112233	Minnie	Mouse	P-00077736		SF-190814-00001	In Circulation		Buffy Coat	HTRC		98Testing			
<input type="checkbox"/> 5081900124	00112233	Minnie	Mouse	P-00077736		SF-190814-00001	In Circulation		Buffy Coat	HTRC		98Testing			
<input type="checkbox"/> 5081900125	000001111111	Daffy	Duck	P-00077738		SF-190816-00001	Disposed	Consumed	Whole Blood	HTRC		98Testing			SS-0000
<input type="checkbox"/> 5081900126	000001111111	Daffy	Duck	P-00077738		SF-190816-00001	In Prep		Plasma	HTRC		98Testing			
<input type="checkbox"/> 5081900127	000001111111	Daffy	Duck	P-00077738		SF-190816-00001	In Prep		Plasma	HTRC		98Testing			
<input type="checkbox"/> 5081900128	000001111111	Daffy	Duck	P-00077738		SF-190816-00001	In Prep		Plasma	HTRC		98Testing			
<input type="checkbox"/> 5081900129	000001111111	Daffy	Duck	P-00077738		SF-190816-00001	In Prep		Buffy Coat	HTRC		98Testing			
<input type="checkbox"/> 5081900130	000001111111	Daffy	Duck	P-00077738		SF-190816-00001	In Prep		Buffy Coat	HTRC		98Testing			
<input type="checkbox"/> 5081900131	000001111111	Daffy	Duck	P-00077738		SF-190816-00001	In Prep		Buffy Coat	HTRC		98Testing			
<input type="checkbox"/> 5081900189	1234568	test	hema	P-00077741	123456	SF-190821-00001	Disposed	Consumed	Whole Blood	HTRC		98Testing			SS-0000
<input type="checkbox"/> 5081900190	1234568	test	hema	P-00077741	123456	SF-190821-00001	In Circulation		Plasma	HTRC	mfekete	98Testing		/B081900017	
<input type="checkbox"/> 5081900191	1234568	test	hema	P-00077741	123456	SF-190821-00001	In Circulation		Plasma	HTRC	mfekete	98Testing		/B081900017	
<input type="checkbox"/> 5081900192	1234568	test	hema	P-00077741	123456	SF-190821-00001	In Circulation		Plasma	HTRC	mfekete	98Testing		/B081900017	
<input type="checkbox"/> 5081900193	1234568	test	hema	P-00077741	123456	SF-190821-00001	In Circulation		Buffy Coat	HTRC	mfekete	98Testing		/B081900017	
<input type="checkbox"/> 5081900194	1234568	test	hema	P-00077741	123456	SF-190821-00001	Disposed	Rejected	Buffy Coat	HTRC		98Testing			

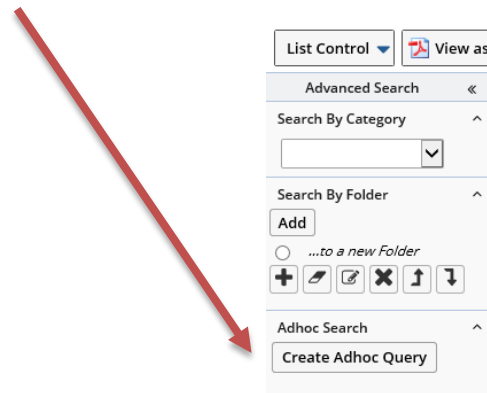
# Searching and Viewing Data: AdHoc Query

## Using AdHoc Query Option with more details

- Let's say you want to view all Plasma and Whole Blood samples that were collected for the IRB protocol "98Testing" between the dates of 8/1/2019 – 8/31/2019
- From the Samples page, select "Show Advanced Search"



- On the left panel press the "Create Adhoc Query" button.



# Searching and Viewing Data: AdHoc Query

For this search, you would create an adhoc query like this:

The screenshot shows the AdHoc Query interface with the following components:

- Buttons:** Search Now, Count Results, Save Query, Delete Query, Close.
- Left Panel:** A list of search criteria including Sample Type, Notes, Disposal Date, Received By, Sample Family, Study Site, Collection Date, Recieved Date, Subject, Disease, Tissue, Initialmass, Initialmass Units, Initialvolume, Initialvolume Units, and Participant.
- Query Configuration:**
  - Select A Saved Query:** (New Query)
  - Criteria Group 1:** **Meet ALL of the Criteria Groups** (selected). Criteria: Sample Type is Plasma OR Sample Type is Whole Blood. Logic: Meet ANY.
  - Criteria Group 2:** **Meet ALL of the Criteria Groups** (selected). Criteria: Protocol is 98Testing AND Recieved Date between 08/01/2019 and 08/31/2019. Logic: Meet ALL.
  - New Criteria Group** button.

Annotations:

- Criteria Group 1:** Your first Criteria Group will look for Plasma samples OR Whole Blood samples. Use Meet ANY for this Criteria Group
- Criteria Group 2:** Your second Criteria Group will look for the protocol "98Testing" AND the date range. Use Meet ALL for this Criteria Group
- New Criteria Group button:** You will need 2 Criteria Groups for this search. Use the New Criteria Group button to add Criteria Groups
- Overall Logic:** Lastly, select Meet ALL of the Criteria Groups– this means that ALL of the criteria from both Criteria Groups must be met

# Searching and Viewing Data: AdHoc Query

- Once you've created your AdHoc query, hit search to view results
- Select specific samples or all and export this page as a PDF or to Excel

LIMS Menu / Sample List

List Control View as PDF View as Excel Picklist Search Navigators

S081900249 Search By Query Show Advanced Search

[ 0 selected ] 1 - 29 of 29 Group By None

Sample	MRN	First Name	Last Name	Participant	External Participant ID	Sample Family ID	Status	Disposition	Sample Type	Custodial Domain	Custodian	Protocol	Reserved Storage Path	Storage Path
<input type="checkbox"/>	S081900034	000001111111	Daffy	Duck	P-00077738	SF-190801-00005	Disposed	Consumed	Whole Blood	HTRC		98Testing		
<input type="checkbox"/>	S081900035	000001111111	Daffy	Duck	P-00077738	SF-190801-00005	Disposed	Disposed	Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900036	000001111111	Daffy	Duck	P-00077738	SF-190801-00005	Disposed	Disposed	Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900037	000001111111	Daffy	Duck	P-00077738	SF-190801-00005	Disposed	Disposed	Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900041	00112233	Minnie	Mouse	P-00077736	SF-190801-00006	Disposed	Consumed	Whole Blood	HTRC		98Testing		
<input type="checkbox"/>	S081900042	00112233	Minnie	Mouse	P-00077736	SF-190801-00006	In Prep		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900043	00112233	Minnie	Mouse	P-00077736	SF-190801-00006	In Prep		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900044	00112233	Minnie	Mouse	P-00077736	SF-190801-00006	In Prep		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900048	00112233	Minnie	Mouse	P-00077736	SF-190801-00006	In Circulation		Whole Blood	HTRC		98Testing		
<input type="checkbox"/>	S081900118	00112233	Minnie	Mouse	P-00077736	SF-190814-00001	Disposed	Consumed	Whole Blood	HTRC		98Testing		
<input type="checkbox"/>	S081900119	00112233	Minnie	Mouse	P-00077736	SF-190814-00001	In Circulation		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900120	00112233	Minnie	Mouse	P-00077736	SF-190814-00001	In Circulation		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900121	00112233	Minnie	Mouse	P-00077736	SF-190814-00001	In Circulation		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900125	000001111111	Daffy	Duck	P-00077738	SF-190816-00001	Disposed	Consumed	Whole Blood	HTRC		98Testing		
<input type="checkbox"/>	S081900126	000001111111	Daffy	Duck	P-00077738	SF-190816-00001	In Prep		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900127	000001111111	Daffy	Duck	P-00077738	SF-190816-00001	In Prep		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900128	000001111111	Daffy	Duck	P-00077738	SF-190816-00001	In Prep		Plasma	HTRC		98Testing		
<input type="checkbox"/>	S081900189	1234568	test	hema	P-00077741	123456	Disposed	Consumed	Whole Blood	HTRC		98Testing		
<input type="checkbox"/>	S081900190	1234568	test	hema	P-00077741	123456	In Circulation		Plasma	HTRC	mfekete	98Testing		/B081900017
<input type="checkbox"/>	S081900191	1234568	test	hema	P-00077741	123456	In Circulation		Plasma	HTRC	mfekete	98Testing		/B081900017
<input type="checkbox"/>	S081900192	1234568	test	hema	P-00077741	123456	In Circulation		Plasma	HTRC	mfekete	98Testing		/B081900017
<input type="checkbox"/>	S081900214	000001111111	Daffy	Duck	P-00077738	SF-190821-00004	Disposed	Consumed	Whole Blood	HTRC		98Testing		
<input type="checkbox"/>	S081900215	000001111111	Daffy	Duck	P-00077738	SF-190821-00004	In Circulation		Plasma	HTRC	mfekete	98Testing		/B081900017

# Searching and Viewing Data: AdHoc Query Data Element Dictionary Part 1

AdHoc Search	AdHoc Search Description	BF Example	Tissue Example
Sample	Sample Number	S031606245	S031606247
Sample Type	Sample Type (child)	DNA	OCT Diseased
Sampletype Description	Sample Type (child)	DNA	OCT Diseased
Sample Family	Sample Family ID #	SF-160325-00013	SF-160325-00014
Study Site	Study Site ID #	SS-00001279	SS-00001279
StudySite Description	Study Site Desc. (Where Specimen Was Processed)	_P524	_P524
Collection Date	Specimen Received Date/Time	3/2/16 10:25 AM	3/25/16 12:39 PM
Recieved Date	Date Sample was entered into LV by HTRC	3/25/16 12:26 PM	3/25/16 12:45 PM
Subject	Subject ID #	ST-00076083	ST-00076083
Birth Date	DOB	5/26/81 12:00 AM	5/26/81 12:00 AM
Gender Flag	Gender (M OR F OR U)	M	M
MRN#	MRN #	6666666666666666	6666666666666666
Race	Race	White or Caucasian.	White or Caucasian.
Ethnicity	Ethnicity	Not Hispanic/Not Latino	Not Hispanic/Not Latino
First Name	First Name	Testing	Testing
Middle Name	Middle Name	Nick	Nick
Last Name	Last Name	Tester1	Tester1
Disease	Disease ID #		DS-00000002
Tissue	Tissue Only: Tissue ID #		TS-00000110
Tissue Description	Tissue Description		Colon
Initialmass	Tissue Parent Specimen Mass		1.0000000000
Initialmass Units	Tissue Parent Specimen Mass Unit		g
Initialvolume	BF Parent Specimen Volume	4.0000000000	
Initialvolume Units	BF Parent Specimen Volume Unit	ml	
Participant	Participant ID #	P-00058724	P-00058724
Externalparticipant	External Participant ID	External ID Test123	External ID Test123
Participant Status	Participant Status	Enrolled	Enrolled
Enroll Date	Participant Enroll Date	10/6/15 12:00 AM	10/6/15 12:00 AM
Completed Date	Participant Completed Date		
Withdrawal Date	Participant Withdrawal Date		
Height	Tissue Child Sample Height		0.5000000000
Length	Tissue Child Sample Length		0.5000000000
Width	Tissue Child Sample Width		0.5000000000
Dimension Unit	Tissue Child Sample Dimension Unit		cm
Participant Consented	Participant Consented (Y or N)	Y	Y
Surgery Process Time	Tissue Only: Surgery to Process Time		0-30 Minutes
Actual Collection Date & Time	BF Only: Actual Collection (Draw Date/Time)	3/1/16 12:53 PM	

# Searching and Viewing Data: AdHoc Query Data Element Dictionary Part 2

AdHoc Search	AdHoc Search Description	BF Example	Tissue Example
Processed Date	BF Only: Processing Date/Time	3/2/16 11:02 AM	
Surgical Methods	Tissue Only: Surgical Method		Total Colectomy
Confirmed By	Confirmed By	HTRC	HTRC
Sysuser Description	Sysuser Description	HTRC User ID	HTRC User ID
Disabled Flag	Disabled Flag	N	N
Email	Email	htrc@bsd.uchicago.edu	htrc@bsd.uchicago.edu
Defaultdepartment	Defaultdepartment	HTRC	HTRC
Confirmed Date	Date Sample was confirmed in LV by HTRC	3/25/16 12:00 AM	3/25/16 12:00 AM
Protocol	Protocol	Test2015	Test2015
Study Description	Study Description	IRB Protocol Template	IRB Protocol Template
Delinkable Flag	Delinkable Flag (Y or N)	N	N
Duration	Duration of Protocol	369	369
Units of Measurement	Duration of Protocol Units	Years	Years
Anticipated Start Date	Anticipated Start Date of Protocol	7/31/15 12:00 AM	7/31/15 12:00 AM
PI User	PI User	TestPI	TestPI
Storage Status	Storage Status of Sample	In Circulation	In Circulation
Storageisposal Status	Storageisposal Status		
Is it an Externally processed Sample ?	Externally Proecessed Sample (Y or Blank)		y
Surgical Method	surgical method		
Surgical Pathology Number	Surgical Pathology Number		S-13123456
Parent Sample Type ID	Parent Sample Type (DR LOOK INTO THIS)	Whole Blood	Tissue
Samplotype Description	Parent Sample Type	Whole Blood	Tissue
Notes	n/a		
Active Flag	Active Flag	Y	Y
Custodial Domain	Custodial Domain	HTRC	HTRC
Container Type	Parent Sample Container Type (ie lavender tube)		
Current Location	Current Storage Location	/B031600052/A2	/B031600052/A3
Custodian	Custodian	drufo	drufo
Quantity	Current Sample Quantity (Volume or Mass)	0.5000000000	0.5000000000
Reserved Location	Reserved Location		
Sample Type	Sample type (child)	DNA	OCT Diseased
260/280	Attribute- 260/280	2	
Cell Concentration	Attribute- cell concentration	4	
Cell Viability	Attribute- cell viability	5	
DNA Concentration	Attribute- DNA concentration	3	
OD 260	Attribute- OD 260	1	
Specific Tissue Location	Attribute- specific tissue location		Specific Colon Location
Breast-ER(var:Breast-ERdataset:1 )Breast-ER(Standard) rep:1	Tissue Only: Test Results		Positive
Breast-HER2(var:Breast-HER2dataset:1 )Breast-HER2(Standard) rep:1	Tissue Only: Test Results		Negative
Breast-PR(var:Breast-PRdataset:1 )Breast-PR(Standard) rep:1	Tissue Only: Test Results		Negative

# Creating Reports

- You now have the skills to use an Adhoc Query to search for data within LabVantage
- Next, you will learn how to utilize the Adhoc Query to create customized reports



- From the LIMS menu, click on the Adhoc Query Biobanking tramstop
- Important! You must perform the Adhoc Query from this tramstop in order to create a report. Accessing the Adhoc Query from other pages using the Create Adhoc Query button  will not allow you to utilize these reporting features




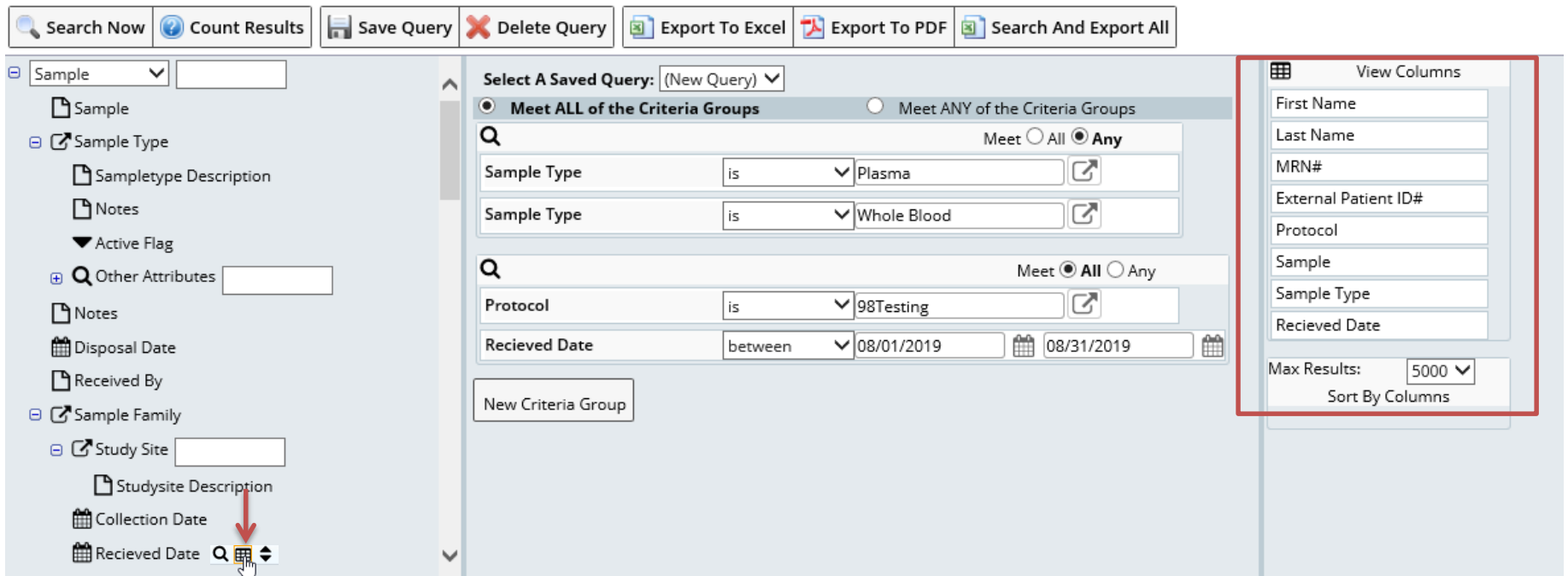
# Creating Reports

- Let's say you want to view all Plasma and Whole Blood samples that were collected for the IRB protocol "98Testing" between the dates of 8/1/2019-8/31/2019 AND you want your report to include the following elements: first name, last name, MRN, external patient ID, IRB protocol, sample number, sample type, and date received
- First, set up your Adhoc Query as though you were doing a simple search

The screenshot displays the 'Adhoc Query' interface. At the top, there are buttons for 'Search Now', 'Count Results', 'Save Query', 'Delete Query', and 'Close'. On the left, a tree view shows various fields: Sample Type, Notes, Disposal Date, Received By, Sample Family, Study Site, Collection Date, Received Date, Subject, Disease, Tissue, Initialmass, Initialmass Units, Initialvolume, Initialvolume Units, and Participant. The main area shows two criteria groups. The first group is titled 'Meet ALL of the Criteria Groups' and contains two criteria: 'Sample Type is Plasma' and 'Sample Type is Whole Blood'. The second group is titled 'Meet ALL of the Criteria Groups' and contains two criteria: 'Protocol is 98Testing' and 'Received Date between 08/01/2019 and 08/31/2019'. A 'New Criteria Group' button is visible at the bottom.

# Creating Reports


- Now, add the elements that you want to appear in the report by clicking on the View Columns icon 

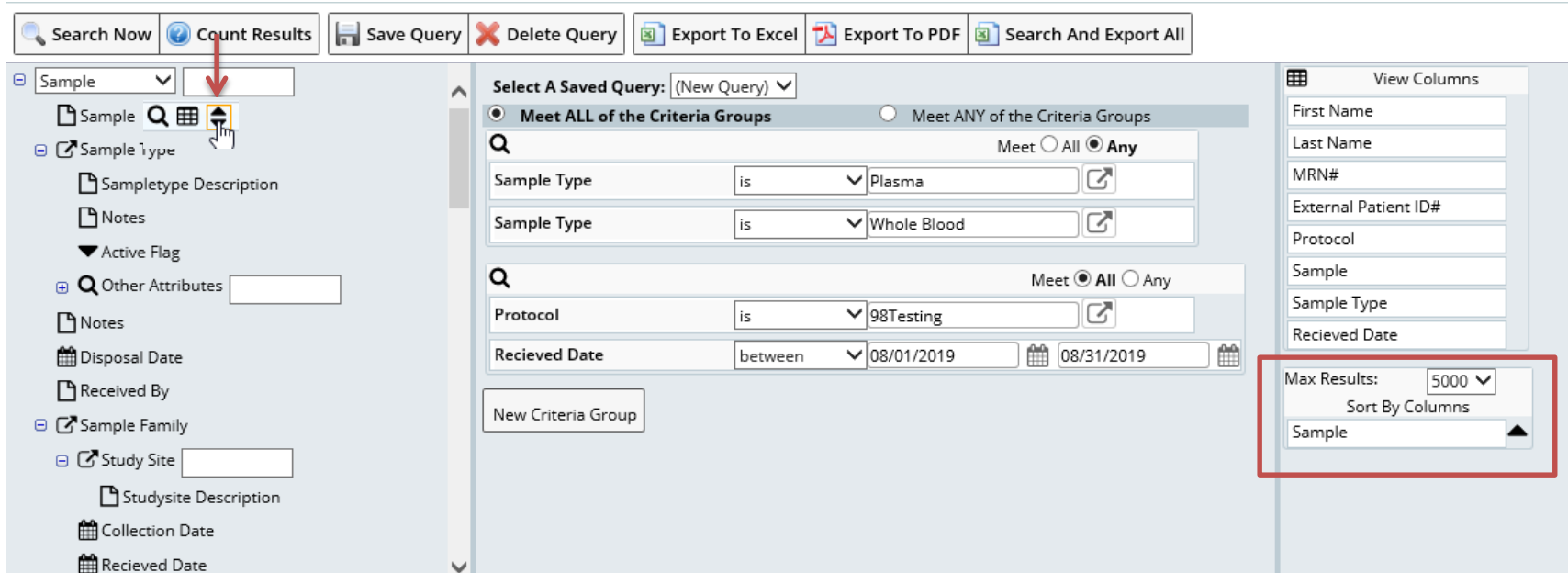


The screenshot displays a software interface for creating reports. At the top, there is a toolbar with buttons for 'Search Now', 'Count Results', 'Save Query', 'Delete Query', 'Export To Excel', 'Export To PDF', and 'Search And Export All'. Below the toolbar, the main interface is divided into several sections:

- Left Panel:** A list of search criteria including 'Sample', 'Sample Type', 'Sampletype Description', 'Notes', 'Active Flag', 'Other Attributes', 'Notes', 'Disposal Date', 'Received By', 'Sample Family', 'Study Site', 'Studysite Description', 'Collection Date', and 'Received Date'. A red arrow points to the 'View Columns' icon (a grid with a hand) next to 'Received Date'.
- Center Panel:** A query builder section titled 'Select A Saved Query: (New Query)'. It features two criteria groups. The first group is set to 'Meet ALL of the Criteria Groups' and contains two criteria: 'Sample Type is Plasma' and 'Sample Type is Whole Blood'. The second group is set to 'Meet ALL Any' and contains two criteria: 'Protocol is 98Testing' and 'Received Date between 08/01/2019 and 08/31/2019'. A 'New Criteria Group' button is located at the bottom of this section.
- Right Panel:** A 'View Columns' panel, highlighted with a red border, which lists the columns to be included in the report: 'First Name', 'Last Name', 'MRN#', 'External Patient ID#', 'Protocol', 'Sample', 'Sample Type', and 'Received Date'. Below the list, there are controls for 'Max Results: 5000' and 'Sort By Columns'.

# Creating Reports

- Now add the element that you would like the report sorted by using the Add to Sort By Column icon 



The screenshot displays a query builder interface with the following components:

- Toolbar:** Search Now, Count Results, Save Query, Delete Query, Export To Excel, Export To PDF, Search And Export All.
- Left Panel:** A tree view of fields including Sample, Sample type, Sampletype Description, Notes, Active Flag, Other Attributes, Disposal Date, Received By, Sample Family, Study Site, Studysite Description, Collection Date, and Received Date. A red arrow points to the 'Add to Sort By Column' icon (a grid with an upward arrow) next to the 'Sample' field.
- Center Panel:** 'Select A Saved Query: (New Query)'. It shows two criteria groups:
  - Group 1:** 'Meet ALL of the Criteria Groups'. Criteria: 'Sample Type is Plasma' and 'Sample Type is Whole Blood'.
  - Group 2:** 'Meet ALL of the Criteria Groups'. Criteria: 'Protocol is 98Testing' and 'Received Date between 08/01/2019 and 08/31/2019'.
- Right Panel:** 'View Columns' section with a list of fields: First Name, Last Name, MRN#, External Patient ID#, Protocol, Sample, Sample Type, and Received Date. Below this list, a 'Sort By Columns' dropdown is set to 'Sample', and a 'Max Results' dropdown is set to '5000'. A red box highlights the 'Sort By Columns' and 'Max Results' settings.

# Creating Reports

- Now, click either Search Now (and then Export to Excel or Export to PDF) or Search and Export All to view your report

	A	B	C	D	E	F	G	H
1	First Name	Last Name	MRN#	External Patient ID#	Protocol	Sample	Sample Type	Recieved Date
2	Daffy	Duck	000001111111		98Testing	S081900034	Whole Blood	08/01/2019 11:05 AM
3	Daffy	Duck	000001111111		98Testing	S081900035	Plasma	08/01/2019 11:05 AM
4	Daffy	Duck	000001111111		98Testing	S081900036	Plasma	08/01/2019 11:05 AM
5	Daffy	Duck	000001111111		98Testing	S081900037	Plasma	08/01/2019 11:05 AM
6	Minnie	Mouse	00112233		98Testing	S081900041	Whole Blood	08/01/2019 11:12 AM
7	Minnie	Mouse	00112233		98Testing	S081900042	Plasma	08/01/2019 11:12 AM
8	Minnie	Mouse	00112233		98Testing	S081900043	Plasma	08/01/2019 11:12 AM
9	Minnie	Mouse	00112233		98Testing	S081900044	Plasma	08/01/2019 11:12 AM
10	Minnie	Mouse	00112233		98Testing	S081900048	Whole Blood	08/01/2019 11:12 AM
11	Minnie	Mouse	00112233		98Testing	S081900118	Whole Blood	08/14/2019 10:24 AM
12	Minnie	Mouse	00112233		98Testing	S081900119	Plasma	08/14/2019 10:24 AM
13	Minnie	Mouse	00112233		98Testing	S081900120	Plasma	08/14/2019 10:24 AM
14	Minnie	Mouse	00112233		98Testing	S081900121	Plasma	08/14/2019 10:24 AM
15	Daffy	Duck	000001111111		98Testing	S081900125	Whole Blood	08/16/2019 10:35 AM
16	Daffy	Duck	000001111111		98Testing	S081900126	Plasma	08/16/2019 10:35 AM
17	Daffy	Duck	000001111111		98Testing	S081900127	Plasma	08/16/2019 10:35 AM
18	Daffy	Duck	000001111111		98Testing	S081900128	Plasma	08/16/2019 10:35 AM
19	test	hema	1234568		98Testing	S081900189	Whole Blood	08/21/2019 9:21 AM
20	test	hema	1234568		98Testing	S081900190	Plasma	08/21/2019 9:21 AM
21	test	hema	1234568		98Testing	S081900191	Plasma	08/21/2019 9:21 AM
22	test	hema	1234568		98Testing	S081900192	Plasma	08/21/2019 9:21 AM
23	Daffy	Duck	000001111111		98Testing	S081900214	Whole Blood	08/21/2019 11:04 AM
24	Daffy	Duck	000001111111		98Testing	S081900215	Plasma	08/21/2019 11:04 AM
25	Daffy	Duck	000001111111		98Testing	S081900216	Plasma	08/21/2019 11:04 AM
26	Daffy	Duck	000001111111		98Testing	S081900217	Plasma	08/21/2019 11:04 AM
27	Fake	Fake	FakeFake		98Testing	S081900249	Whole Blood	08/27/2019 11:06 AM
28	Fake	Fake	FakeFake		98Testing	S081900250	Plasma	08/27/2019 11:06 AM
29	Fake	Fake	FakeFake		98Testing	S081900251	Plasma	08/27/2019 11:06 AM
30	Fake	Fake	FakeFake		98Testing	S081900252	Plasma	08/27/2019 11:06 AM

# For Additional Help...

- Please see the HTRC website for more information and to find additional training resources: <https://htrc.uchicago.edu>
- Or email the LabVantage administrators at: [labvantage@bsd.uchicago.edu](mailto:labvantage@bsd.uchicago.edu)