

St George's University of London – HTA Research Licence 12335			
Title: Doc	Management of Samples and tracking using ITEMTRACKER	Author: G Cockerill New Author : P. Lympany	Date: 2 <sup>nd</sup> October 2012 Date :20 <sup>th</sup> March 2018
No.:	SOP_R6	Version: 3	Review Date: March 2020



**SOP\_R6: MANAGEMENT OF SAMPLES AND TRACKING USING ITEMTRACKER™**

**Disclaimer**

When using this document, please ensure that the version you are using is the most up to date either by checking on the SGUL/PORTAL/RESEARCH/HTA web page for any new versions or contact the HTA Coordinator to confirm the current version.

**Out of date documents must not be relied upon and should be destroyed.**

3	March 2018	Reviewed & Amended (New Author)	AS	PL
3	July 2017	Reviewed and PD contact details updated	AS	PL
3	July 2017	Reference to HTA codes updated	PL	HTLRG
3	July 2017	Reviewed and PD contact details	PL	HTLRG
2	05/12/16	Update contact list	AS	PL
2	07/10/16	New DI details	AS	MF
2	17/03/16	Issue for use	GC	HTLRG
1	31/10/12	Issue for use	GC	HTLRG
0	30/10/12	Issue for review	GC	HTLRG
<b>Rev</b>	<b>Date</b>	<b>Amendment</b>	<b>Approved by</b>	<b>Authorised by</b>

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## 1 Purpose/Background

- 1.1 This SOP sets out the use of the Itemtracker™ software as a tool to aid in the tracking and management of HTA freezer samples within St George's University of London.

## 2 Scope

- 2.1 This SOP relates only to activities covered by the HTA Licence 12335 (Storage of relevant material which has come from a human body for a scheduled purpose).

## 3 Overview

- 3.1 Itemtracker™, is a networked sample management database that is held on the secure SGUL server. Access requires a password and is restricted to authorized users. Itemtracker™, records details of the specimen, its location, consent, ethics number and the ultimate use of the material.

Each record is allocated a unique Itemtracker™ ID number.

- 3.2 All specimens of human biological material that contain human cells that are stored for research purposes must be entered into Itemtracker™, including Organs, tissue, blood, plasma, cells etc. Samples can be either stored with a Research Ethics Number or if this is expired, they can be archived under the HTA license (12335). Please note that samples that do not have ethics must comply with HTA requirements and cannot be used for research until ethics approval has been obtained.

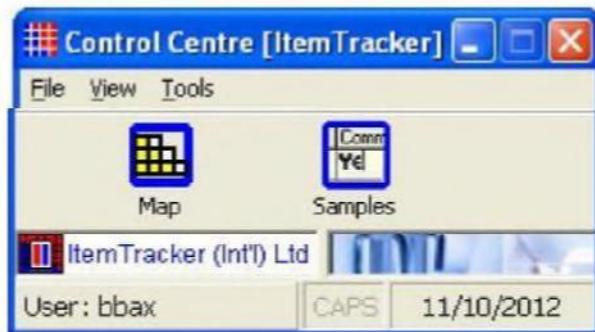
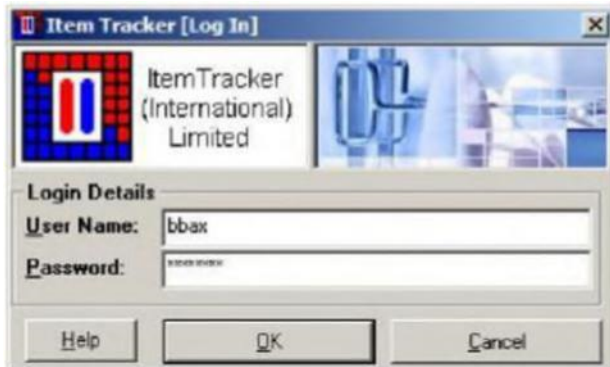
- 3.3 The Itemtracker™ database is accessed from the client computers; the program is installed by the SGUL IT department, under the authorization of research group leaders. Each group maintains its confidentiality and will only have access to their own samples.

## 4 Contents

Logging on	5.0
Creating a new storage location	6.0
Creating new samples	7.0
Locking/ Unlocking samples for editing	8.0
Importing from Excel onto Itemtracker	9.0
Searching for stored samples/ History/ Auditing	10.0
Printing labels from Itemtracker	11.0
Training	12.0

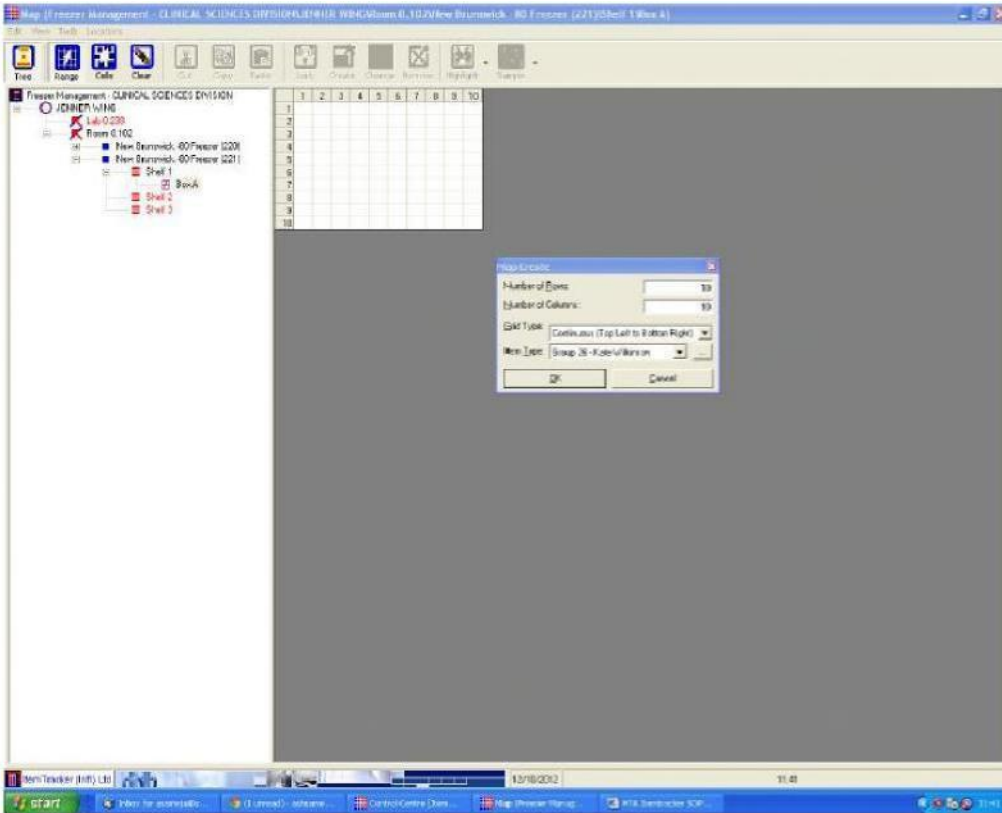
## 5 Logging on

After clicking onto the Itemtracker client software logo on the desktop, the user will be required to log on. This is done by first entering your username (which is your SGUL username) and then entering your password in the space below.

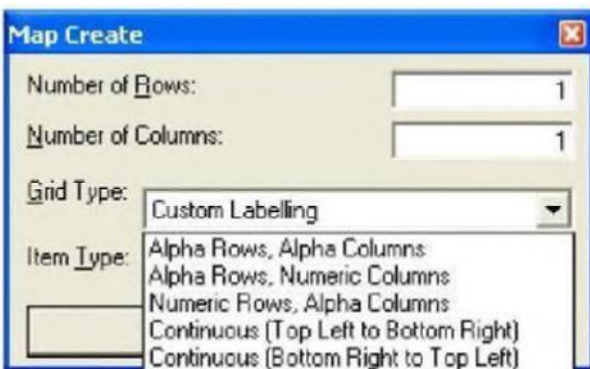


## 6.0 Creating a new storage location

Once logged onto Itemtracker, you will see under the map screen a list of your group's room numbers and the freezers contained within. Each freezer will have a number of shelves assigned to it; each of these shelves can be assigned a rack/ box or other container types into which samples can be added.



Once the desired freezer shelf is selected, right click and select **NEW PART**. Then name the part (e.g. box 1), you will then be asked for the dimensions of the container (rows and columns) which can be customized to your needs.



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## 7 Creating new samples

To create a new sample/ samples, select the location in the container and click on the CREATE icon along the top of the screen. This will present you with the create sample dialogue box, which contains a number of required fields to be completed. The required fields are: Sample ID, DATE, TYPE, research ethics committee number and a Y/N question relating to whether or not the sample is stored under the HTA license. The name of the PI also needs to be added, this is selectable from the PI drop down menu.

Once the fields have been filled in, click on the create tab along the bottom of the dialogue box and the sample will be entered in the space previously selected in the container.

In order to create multiple samples, simply follow the steps above and select the edit/ copy tab at the top

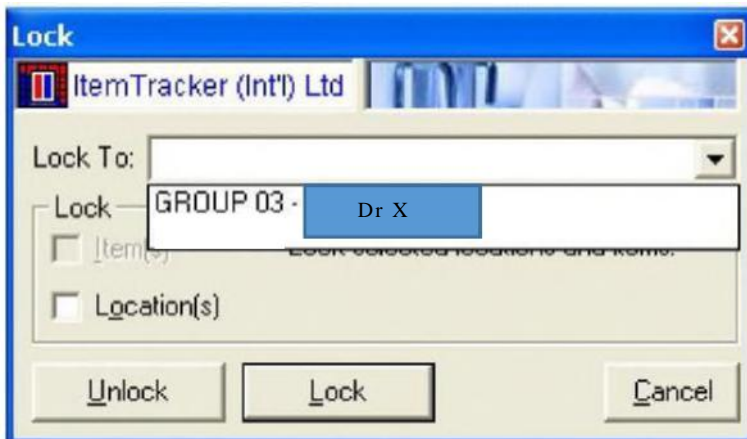
of the dialogue box. Enter the number of copies you wish to create; once this is done you will be able to edit various properties without having to enter all of the details individually.

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### 8.0 Locking/ Unlocking samples for editing

Once a specimen is created you may need to lock it to yourself or your group in order to edit it. Select the entry to be locked, click the LOCK icon. If you are in sample view, the entry will automatically be locked to you. Choose who the specimen should be locked to from the drop down list. Select LOCK button

### 9.0 Importing from Excel onto Itemtracker

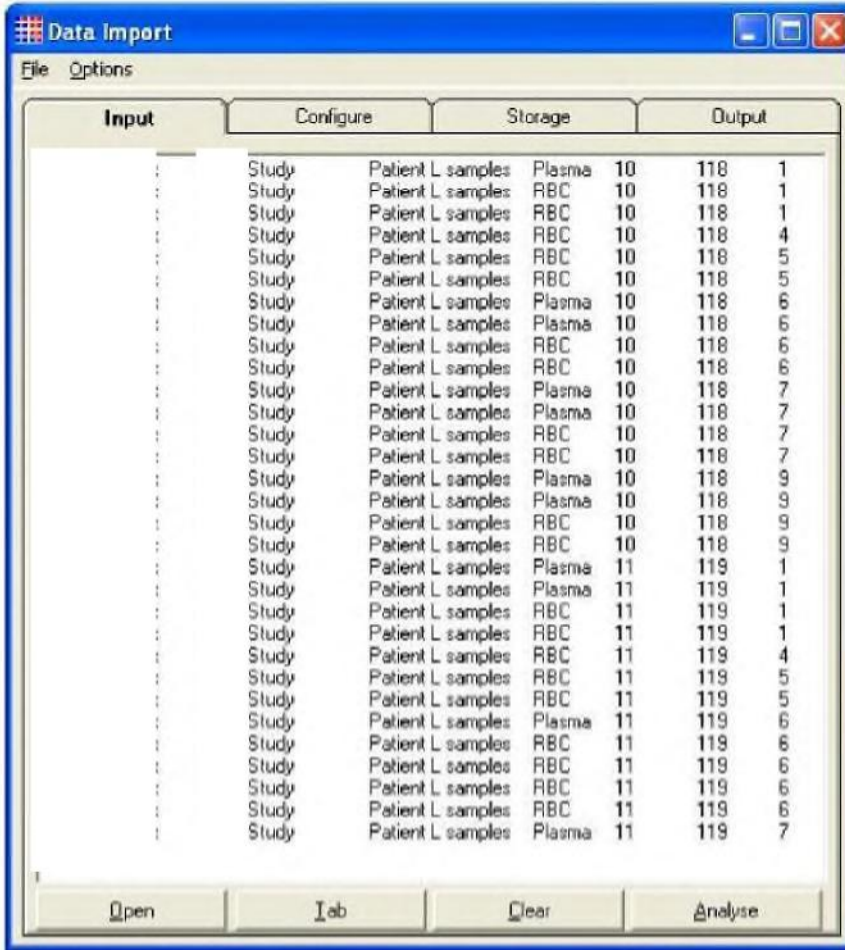


From the log in screen, select Tools/ Data Import/ Delimited.

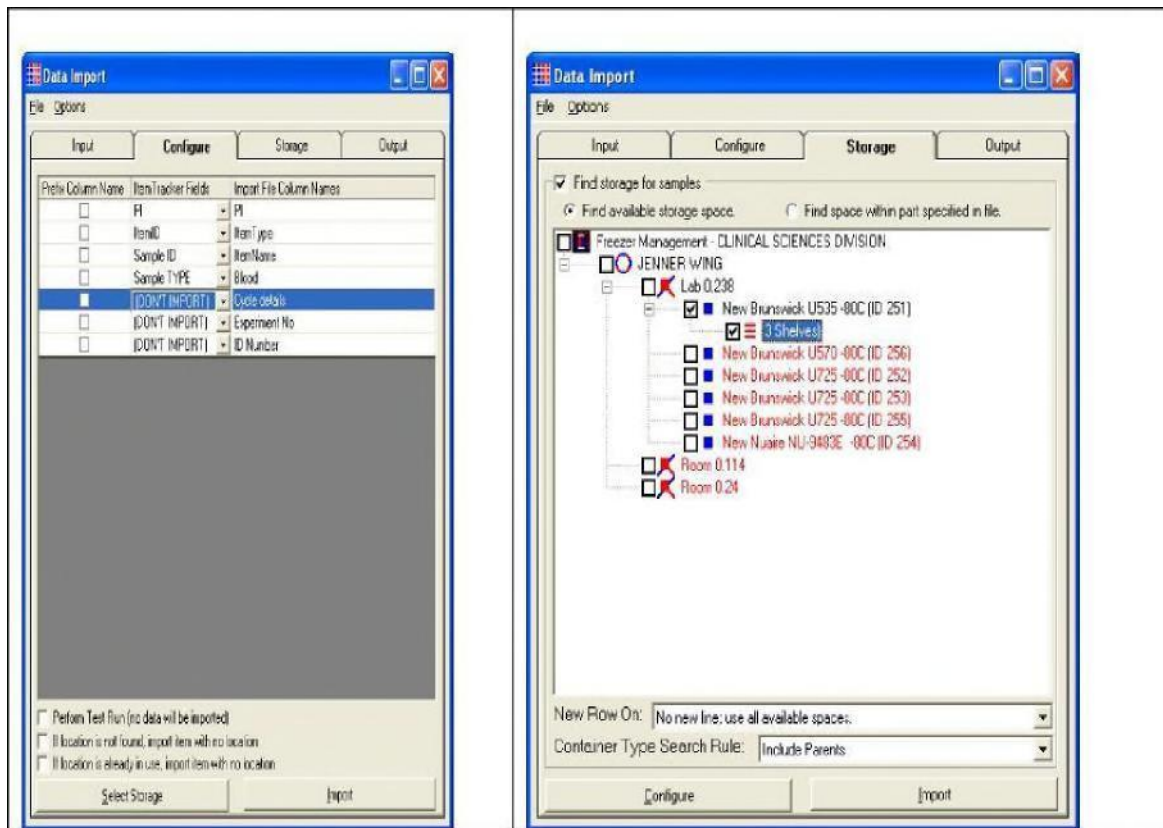


This will bring you to the importing data screen. In order for the data to be correctly imported from Excel, it is important that the headings of each column match the headings in Itemtracker.





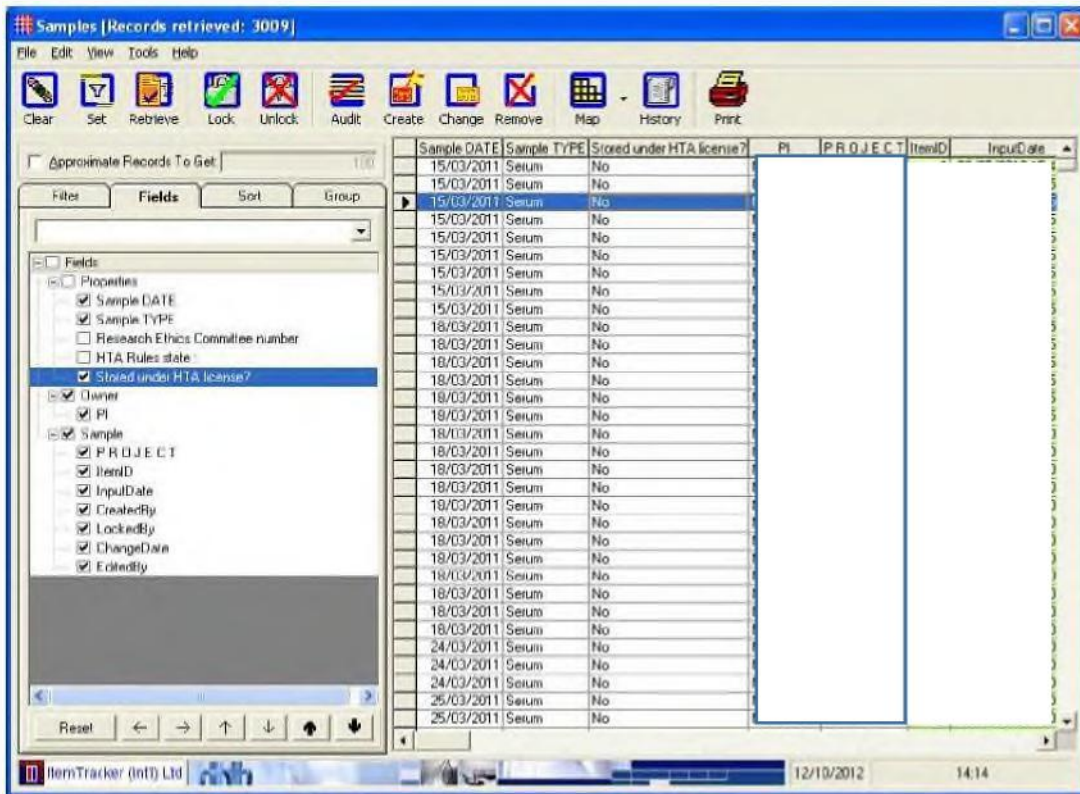
To help with this, there is a template that will be sent to each group to avoid confusion. Once all of the sample details have been added into the template, this can be copied and pasted onto the data import screen. Once this is done, left click the ANALYSE button, this will configure the samples. The next step is to choose a storage location. Click on the storage tab and select find storage for samples/ find available storage space – this will bring up your group’s room and freezer locations. Simply select the Freezer,shelf, and then container you’d like the samples to be stored in and click IMPORT.



## 10 Searching for stored samples/ Auditing

To locate or check any samples previously entered onto the database, go to the SAMPLES window, from the main log in screen. Use the search panel, enter the desired fields in order to retrieve your samples and press the RETRIEVE button.

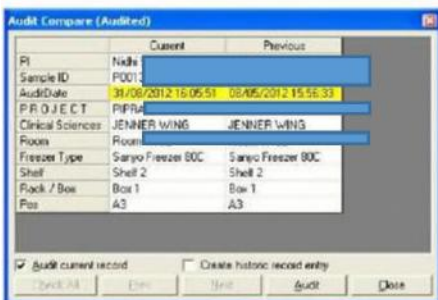
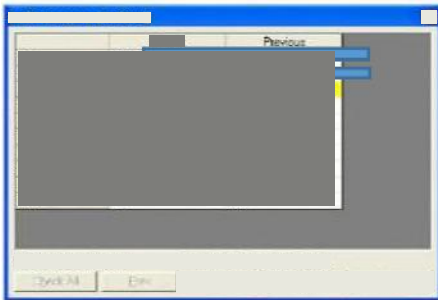
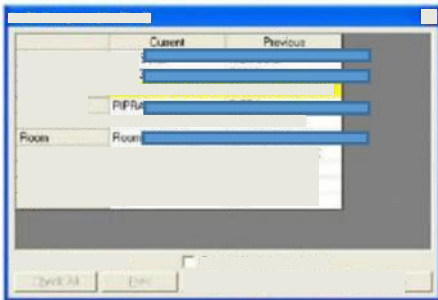




Itemtracker™ also provides functionality to audit individual locations. To bring up the location auditing window, select the **location auditing** window from the menu option from the **auditing** menu.

Every time an action is performed on a sample which changes it, a history record is created. There are two windows related to viewing the history for samples -the **history** and **audit** windows

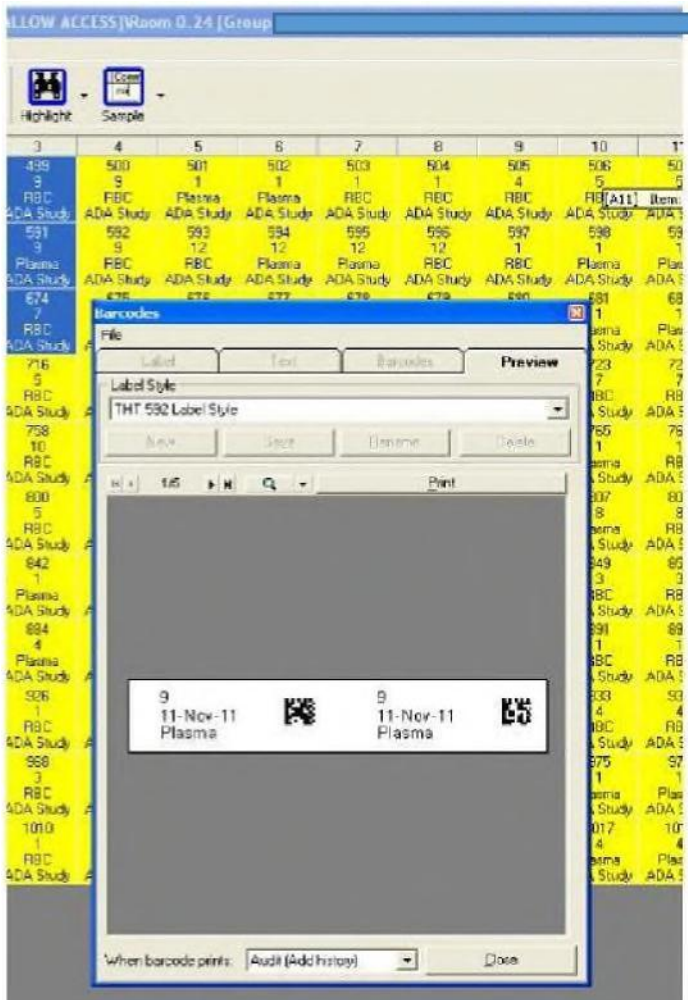
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The audit window shows the current state of the sample compared to its previous state. When samples are changed, the date and time of the change, the computer on which the changes were made, the user who made the changes plus any other useful information are automatically recorded. This provides a complete auditable history for all samples.

### 11 Printing labels from Itemtracker™

Labels can be created from the MAP screen. To print labels select **Tools/ print labels/ Sample labels**. Simply highlight the labels you'd like to print from your container, which are customized to print the **I.D, DATE** and **Sample type**. Your printer command will be directed to the nearest network Brady IP300 printer to your lab. The labels are Freezerbondz™ labels designed to adhere to sample tubes stored either at room temperature or previously frozen tubes. They will also adhere to tubes stored in Cryogenic vessels.



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## 12 Training

All staff members using the Itemtracker software will undergo three training sessions which will cover the following:

- 1) Basic introduction to Itemtracker use and it's applications. Getting started, how to perform everyday tasks.
- 2) Allocation of group and research users and their corresponding projects. Creating storage containers, samples and importing data from excel spreadsheets.
- 3) Searching for and sorting data, printing labels, history and auditing.

## 13 References

<https://www.hta.gov.uk/>  
[www.itemtracker.com](http://www.itemtracker.com)  
[www.bradyid.com](http://www.bradyid.com)

## 14 Amendment of SOPs

If, in the course of applying this document, the user identifies a modification which will improve this document, please bring the suggested changes to the attention of the Person Designated (PD) ([asameja@sgul.ac.uk](mailto:asameja@sgul.ac.uk)) so that amendments can be reviewed and implemented.

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## 15 Contacts - DIs and PDs

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