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



SOP_R6: MANAGEMENT OF SAMPLES AND TRACKING USING ITEMTRACKER™

Disclaimer

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Out of date documents must not be relied upon and should be destroyed.

2	05/12/16 07/10/16	Update contact list New DI details	AS AS	PL 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
Rev	Date	Amendment	Approved by	Authorised by

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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_{TM}, 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_{TM}, records details of the specimen, its location, consent, ethics number and the ultimate use of the material.

Each record is allocated a unique Itemtracker_{TM}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.

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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.

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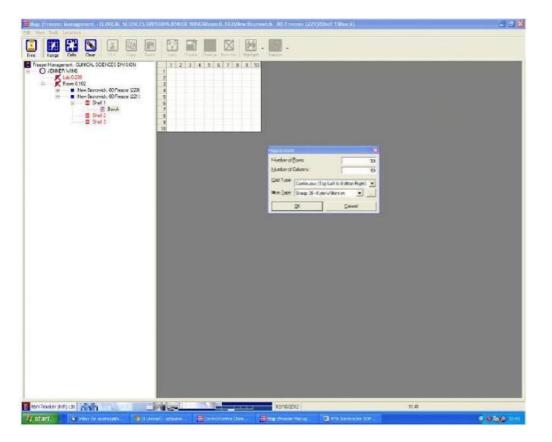
Item Track	er [Log In]		×
	ltemTracker International) Limited	()}	1
Los and an and the			and the second se
Login Details			
Login Details User Name:	bbax		

🌐 Control Centre [ItemTracker] 🗔 🗖 🔀				
<u>File View Tools</u>				
Map	Yel Samples			
ItemTracker (Int'l) Lt	_		N.	
User: bbax	CAPS	11/10/	2012	

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.

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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.

Map Create	20		×
Number of <u>B</u> ows:		1	ī
Number of	Columns:	1	ī
<u>G</u> rid Type:	Custom Labelling	-	1
Item <u>T</u> ype:	Alpha Rows, Alpha Colu Alpha Rows, Numeric C Numeric Rows, Alpha C	olumns	1
	Continuous (Top Left to Continuous (Bottom Rig	Bottom Right)	

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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

Create Sample		X
Edit Move Tools		
PROJECT Group	03-	
	Batch 1	
No. of Sample(s)	1	
Store Sample(s)	Yes	-
Lock Sample(s)	No	•
PI	Dr X	-
Sample ID		* * * * * * *
Date of Birth		•
Access database reference		
Research Ethics Expiry Date	09/09/9999	-
Sample DATE		-
Sample TYPE		-
Research Ethics Committee number		-
HTA Rules state :	Tissue can be stored under I	the HTA lisenc 🝷
Stored under HTA license?	No	-
Select Value	ti-Value Create	Cancel

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

Lock	
ItemTracker (Int'l) Ltd	
Lock To:	•
Lock GROUP 03 - Dr X	
Location(s)	
Unlock Lock Canc	el

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

🇰 Control Centre [ItemTracker] 🗔 🗖 🔯						
File View	Tools					
E	Data Import 🔸 Delimited					
Ę						
CI COL	Map Samples					
ItemTracker (Int'i) Ltd						
User:	CAPS 12/10/2012					

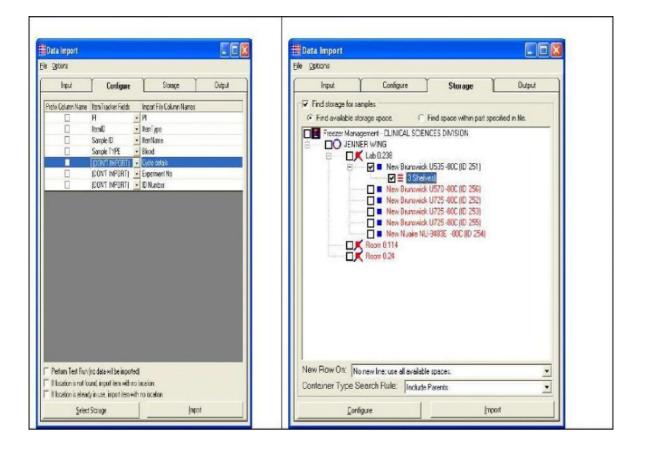
This will bring you to the importing data screen. In order for the data to be correctly imported from Excel, it is important that the headings of each column match the headings in Itemtracker.

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Input	Con	figure	S	lorage	γ	Outp	ul
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÷	Study		samples samples	RBC	10	118	-
	Study		samples	RBC	10	118	
	Study		samples	RBC	10	118	
1	Study		samples	RBC	10	118	
2	Study	Patient L		RBC	10	118	
2	Study		samples	Plasma	10	118	2
	Study	Patient L		Plasma	10	118	- 2
	Study		samples samples	RBC	10	118	
				RBC	10	118	2
	Study		samples		10		5
	Study		samples	Plasma		118	1
1	Study	Patient L		Plasma	10	118	
÷	Study	Patient L		RBC	10	118	
1	Study	Patient L		RBC	10	118	
1	Study		samples	Plasma	10	118	1
1	Study		samples	Plasma	10	118	
1	Study	Patient L		RBC	10	118	
1	Study		samples	RBC	10	118	
1	Study	Patient L		Plasma	11	119	
1	Study	Patient L		Plasma	11	119	
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-	Study	Patient L		RBC	11	119	
1	Study	Patient L		RBC	11	119	
1	Study		samples	RBC	11	119	
1	Study	Patient L		RBC	11	119	
\$	Study	Patient L		Plasma	11	119	1
1	Study	Patient L		RBC	11	119	1
1	Study	Patient L		RBC	11	119	
1	Study		samples	ABC	11	119	1
1	Study	Patient L		ABC	11	119	
1	Study	Patient L	samples	Plasma	11	119	- 7

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.

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10 Searching for stored samples/ Auditing

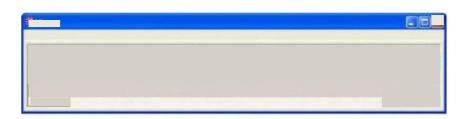
To locate or check any samples previously entered onto the database, go to the SAMPLES window, from the main log in screen. Use the search panel, enter the desired fields in order to retrieve your samples and press the RETRIEVE button.

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ar Set Rebrieve Lock Unlock Audit	Creat	e Change F	Remove	Map History Print			
Approximate Records To Get				YPE Stored under HTA license?	PI	PROJECTItemID	InputDiate
Bobiosesale Hectoria To diec j		15/03/2011		No			
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time and anop	- 2	15/03/2011		No I			
-		15/03/2011		No			
		15/03/2011		No			
🗔 Fields		15/03/2011		No			
BC Properties		15/03/2011		No			
Sample DATE		15/03/2011		No			
Sample TVPE		18/03/2011		No			
Research Ethics Committee number		18/03/2011		No			
HTA Rules state		18/03/2011		No			
Stored under HTA Icense?		18/03/2011		No			
E Chuner		18/03/2011		No			
PI PI		19/03/2011		No			
E Sample		18/03/2011		No			
PROJECT		18/03/2011		No			
✓ ItemID		18/03/2011		No			
✓ InputDate		18/03/2011	Serum	No			
CreatedBy		19/03/2011	Seium	No			
2 LockedBy		18/03/2011	Seium	No			
ChangeDate		18/03/2011	Serum	No			
2 Ecitedity		18/03/2011	Serum	No			
(e) Entering		18/03/2011		No			
		18/03/2011		No			
		18/03/2011		No			
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		24/03/2011		No			
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		25/03/2011		No			
		25/03/2011	Serum	No			

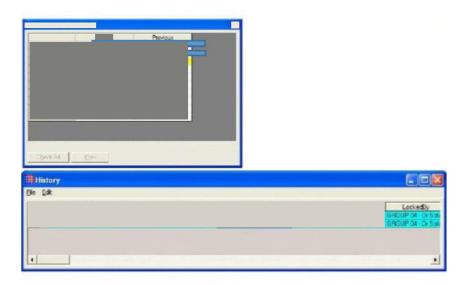
Itemtracker™ also provides functionality to audit individual locations. To bring up the location auditing window, select the **location auditing** window from the menu option from the **auditing** menu.

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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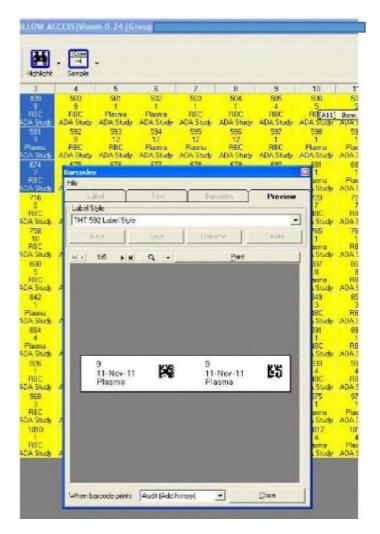
	Cusent	Previous	
PI	Nidh		
Sample ID	P0013		
AuditDiate	31/08/2012 16:05:51	08A05/2012 15:56:33	
PROJECT	PIPR4		
Clinical Sciences	JENNER WING	JENNER WING	
Room	Room		
Freezer Type	Saryo Freezer BOC	Sanyo Freezer 80C	
Shelf	Shell 2	Shell 2	
Rack / Box	Box 1	Box 1	
Pos	43	A3	
	~		

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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 ItemtrackerTM

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_{TM} 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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11-Nov-11

Plasma

12 Training

11-Nov-11

Plasma

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.

L 3

13 References

https://www.hta.gov.uk/ www.itemtracker.com 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) so that amendments can be reviewed and implemented.

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15 Contacts - DIs and PDs

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	PDs	Mr. Paul Carter
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	_	
		Dr. Carol Shiels Ext. 0729 <u>Email: cshiels@sgul.ac.uk</u>
	_	