LABWORKS Exchange Portal

Administrator's Guide
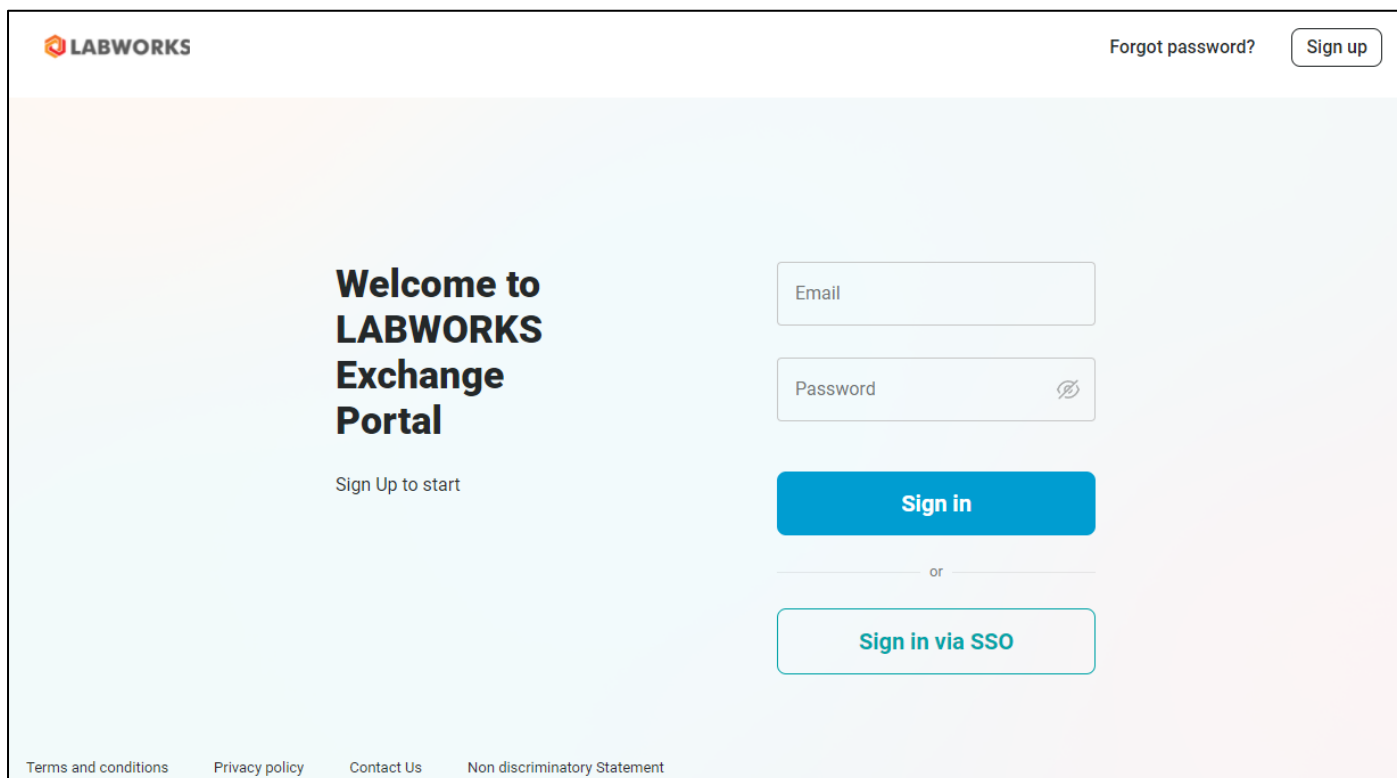
Last update: May, 2022

Contents

About the Exchange Portal

LABWORKS Exchange Portal is a web application that is intended to order samples with analyses from the laboratory. It is integrated with the LABWORKS Enterprise LIMS system.

The application consists of 2 global parts:

- Consumer portal
  - Here, consumers can add new orders, view and manage their own orders or orders owned by other users.
- Administrative portal
  - Here, administrators can manage the portal.

This document describes the Administrative part of the portal.

Please note that names for some properties can be customized by global administrators on the Portal Customization screen. We will use default names in this document. So do not be confused if you see a discrepancy. The following properties can have other names in the portal than names we use in this guide:

- Organization
- Order form
- Catalog
- Catalog item
- Analysis
- Role
- Location code
- Sample
- Analysis method

- LIMS

Also, the portal itself may not be called an Exchange Portal, but how it is configured by administrators.

To order tests, users should have an account in the portal and the "Active" status.

Users can be members of specific organizations or have the access to all organizations.

Every user has user roles. If a user is a member of several organizations, he/she can have different roles in these organizations. Roles can be global or custom. User roles determine what functionality is available on the portal.

Every order can be created for one organization. Organizations have members (users) and the roles that users can play in this organization.

Order forms are the basis on which orders are created. They can have the set of necessary order or sample fields that consumers should fill in, list of catalog items (samples with analyses) to determine what can be ordered. Organizations should use order forms to allow users to add orders, it means that organizations and order forms should be associated with each other.

Exchange Portal Workflow

The workflow is the following:

1. **Organization**

First, administrators should create an organization, specify its details and addresses, domains list. The organization should be active.
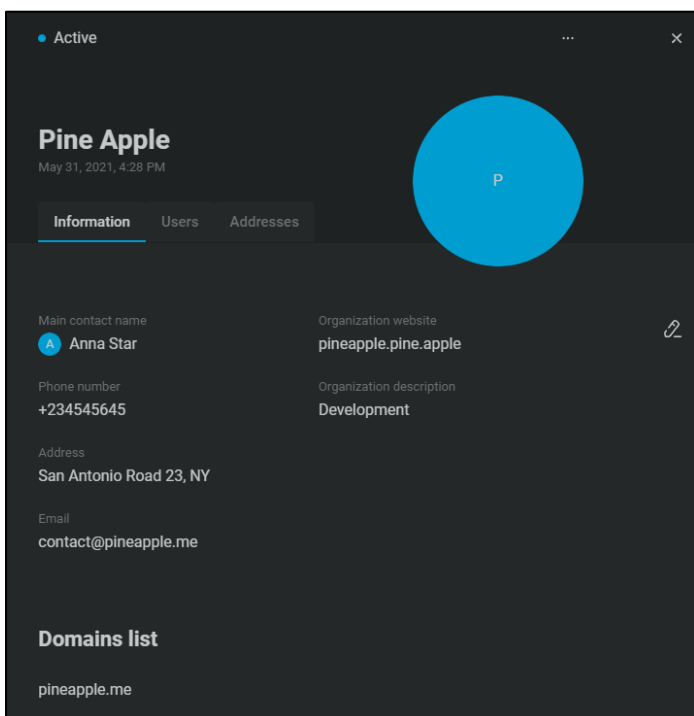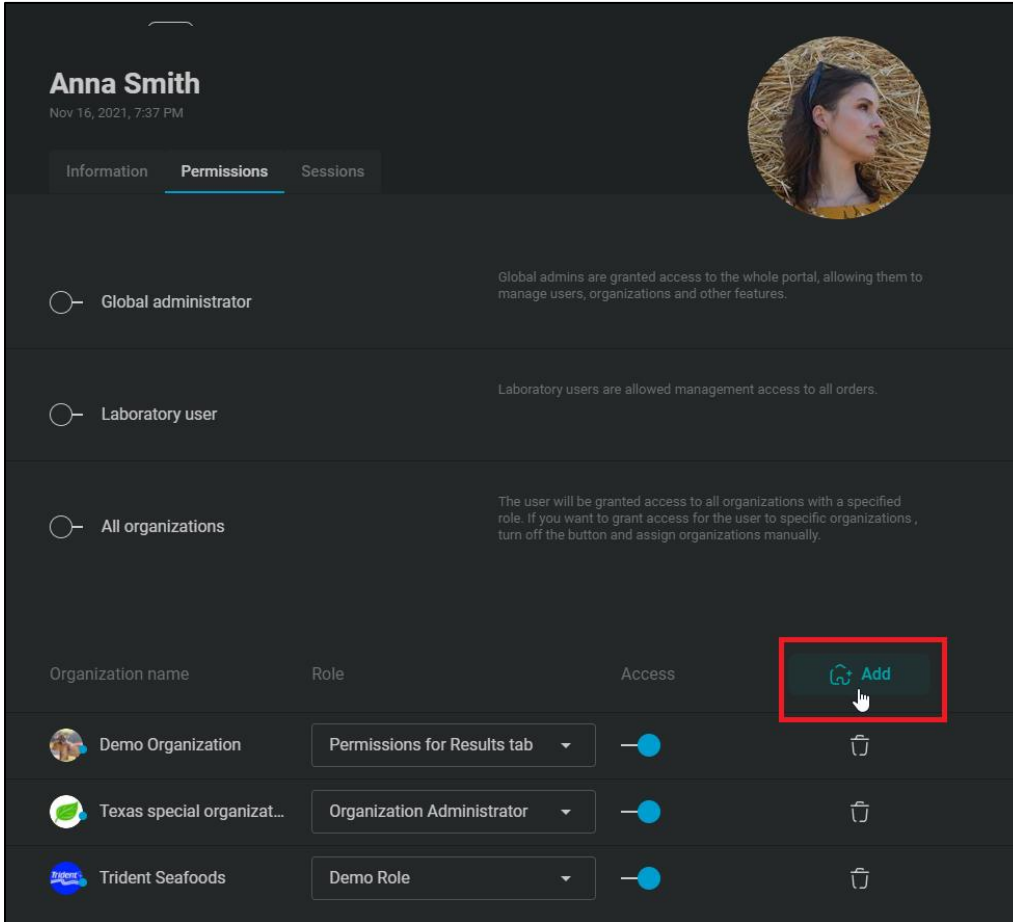

2. **Order creator and/or order owner**

Consumers should be members of this organization.

It can be done in 5 ways:
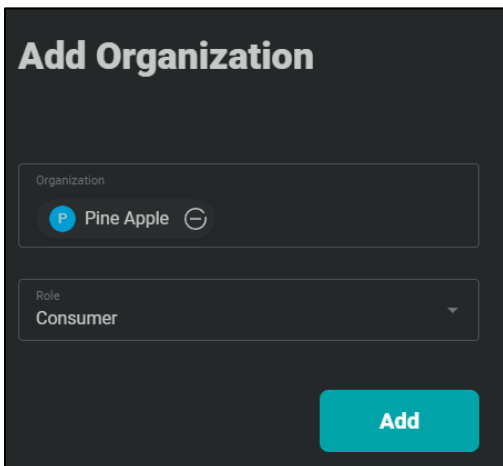
2.1. Add organization to user

If this user already exists in the system, an admin can open his/her details (Permissions tab) and click the Add button to add this user to the needed organization.

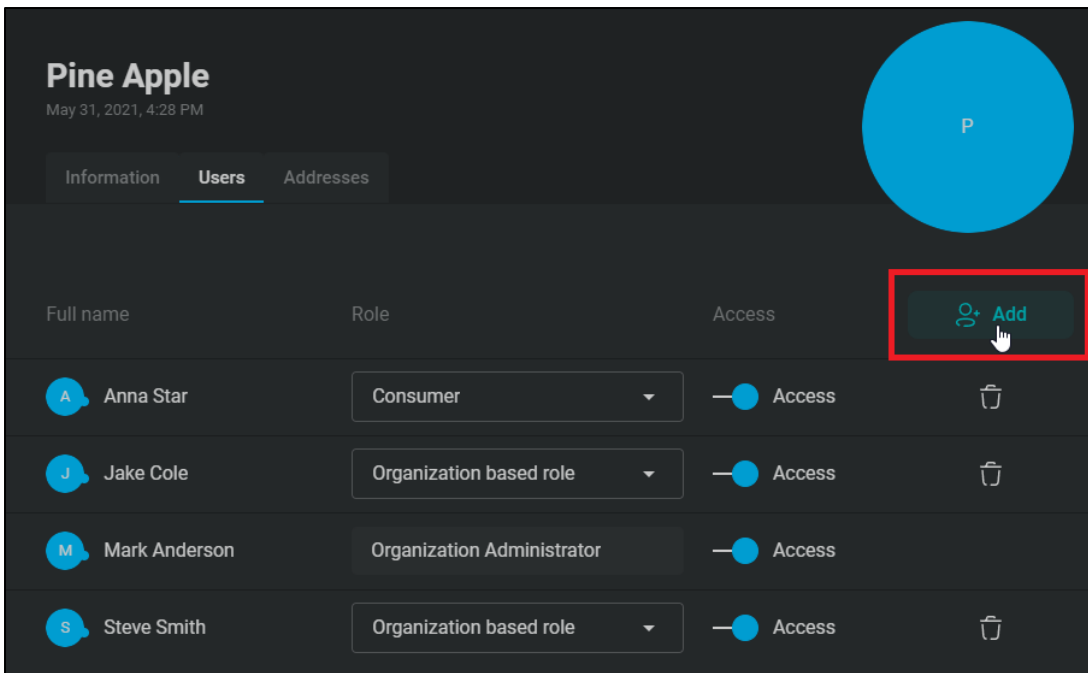The Add Organization dialog will be open, where the admin should select the needed organization and specify the user role in this organization. Click the Add button to add this user to this organization.

2.2. Add user to organization

If this user already exists in the system, an admin can open the organization details (Users tab) and click the Add button to add a new member to this organization.

The Add User dialog will be open, where the admin should select the needed user and specify the user role in this organization. Click the Add button to add this user to this organization.

2.3. Invite user
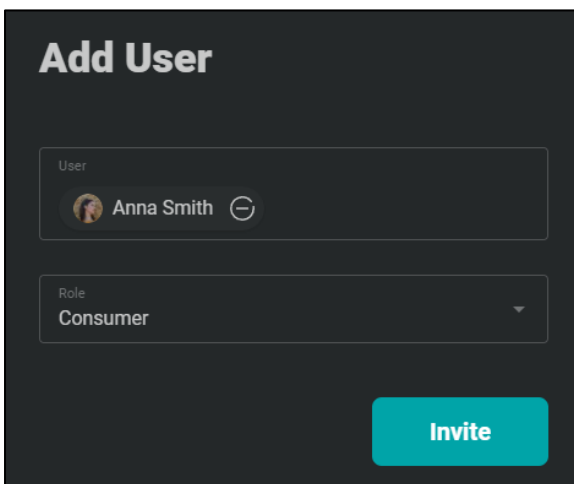
If the user does not exist in the system, we can invite this user. Open the Users List screen by clicking the Users button on the Left menu or on the Administrative Dashboard.
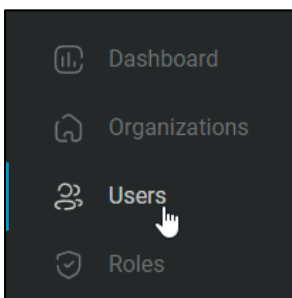
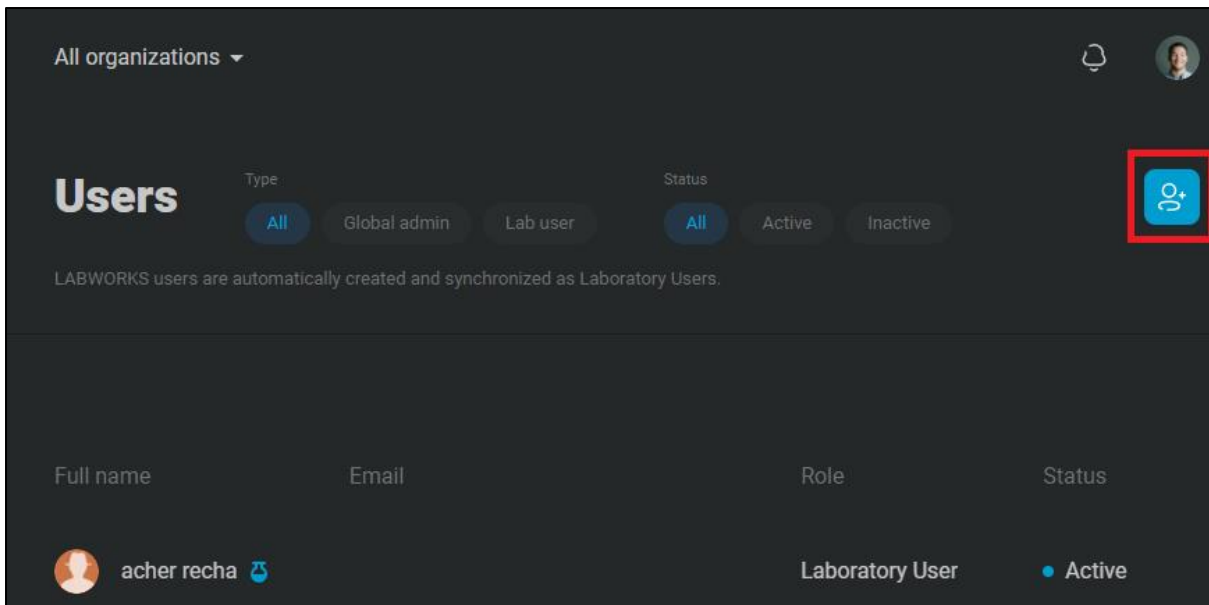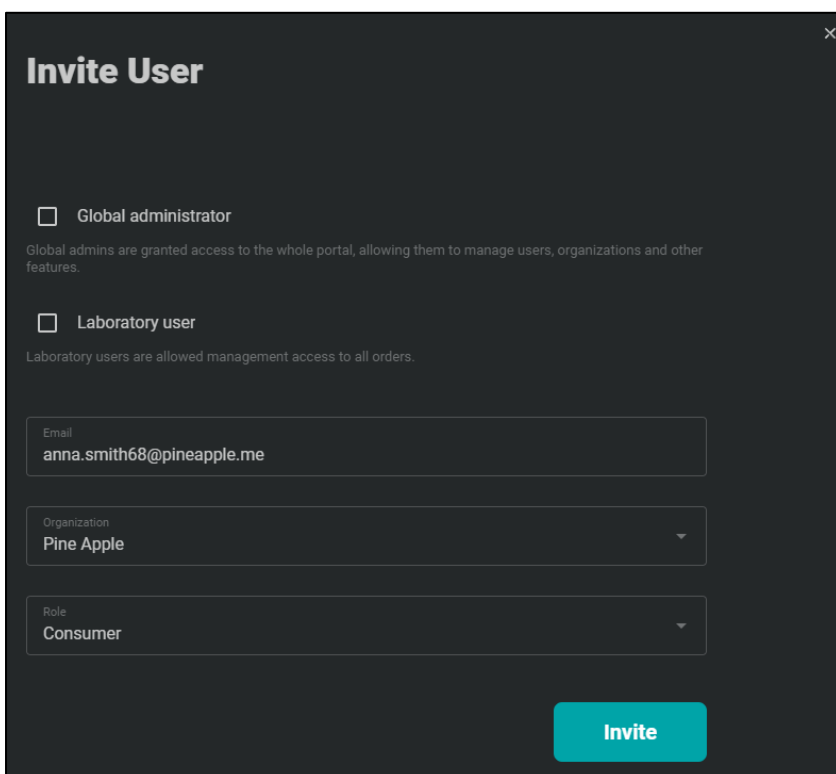Click the Invite user button on the right-top corner of the screen.

The Invite User dialog will be open.

Enter the user email, select the needed organization and specify the role for this user in this organization. Click the Invite button. The user will receive the email with the invitation link. By clicking this link, the user will be redirected to the Sign Up screen, where he/she should enter all information, accept the Terms and Conditions and the Privacy Policy, and click the Sign Up button. After that, the workflow depends on global portal settings.
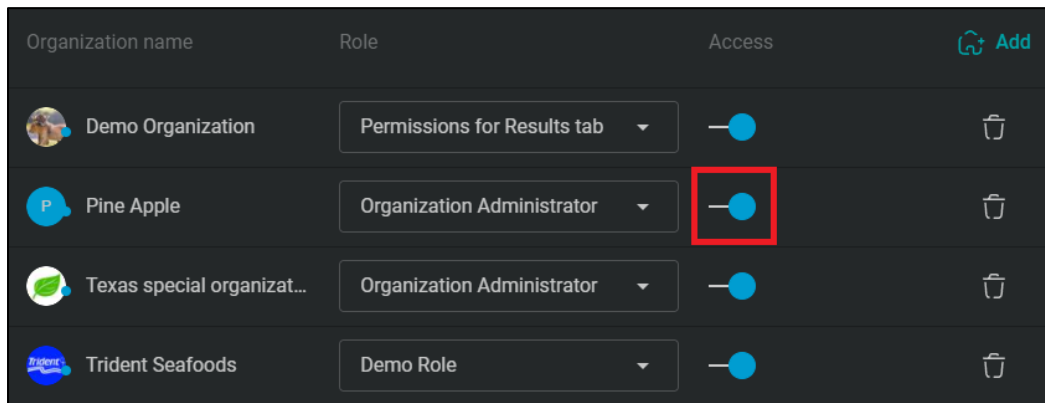
2.4.   Self-registration

If self-registration is enabled, the user can register in the portal by himself. In that case, the domain of the user's email address will be mapped with the list of domains specified for this organization. And the user becomes an organization member if the email address is included into the organization domains.

2.5.   Invite user during organization creation

Users can be invited when creating a new organization.

Please find more information in the Users Registration Workflow section and other corresponding sections of this document.
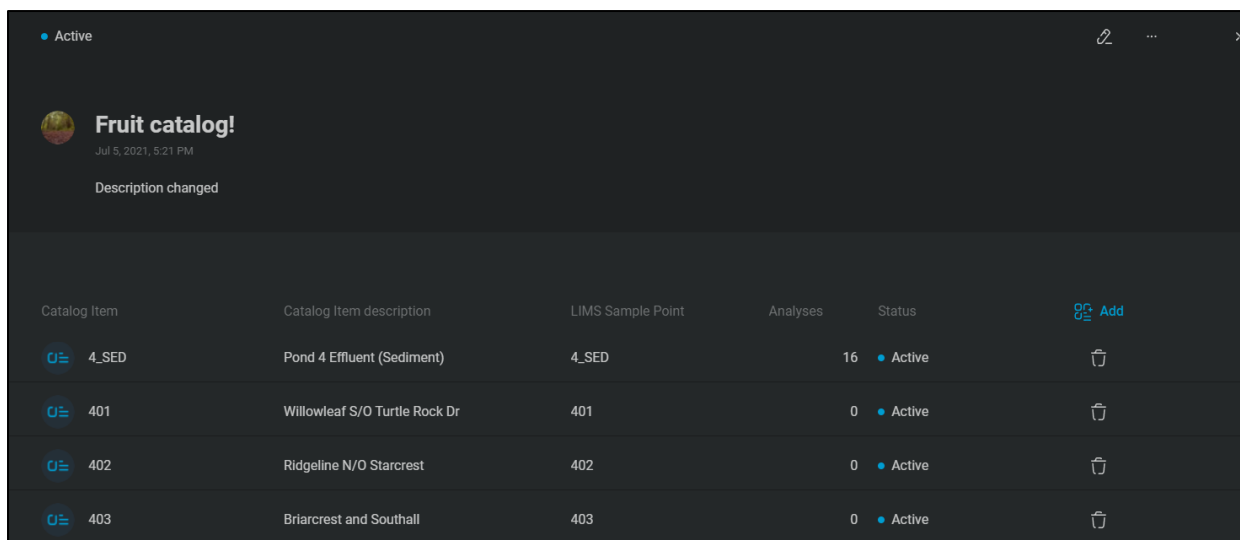
The user should be active and should have access to this organization.

3. Catalog

There should be an active catalog with items available for ordering - location codes from the laboratory (future samples with analyses).

4. Order form

There should be an active order form that includes one or several active catalogs with active samples and analyses.
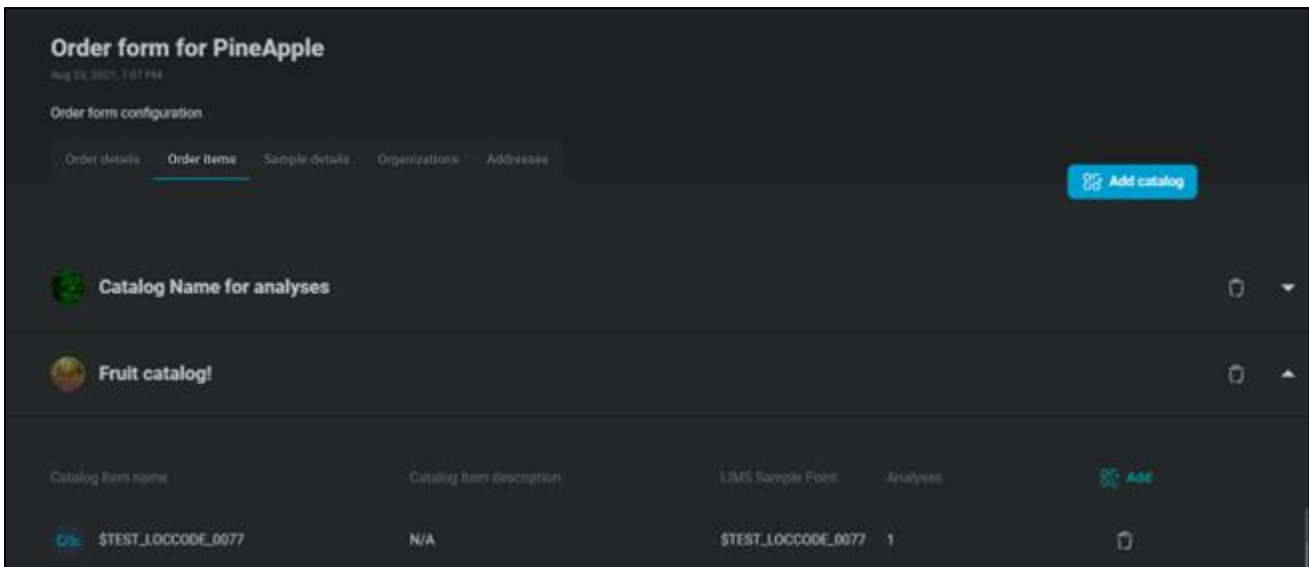
This order form can contain additional order fields (customizable): relevant for the entire order or all samples in the order.
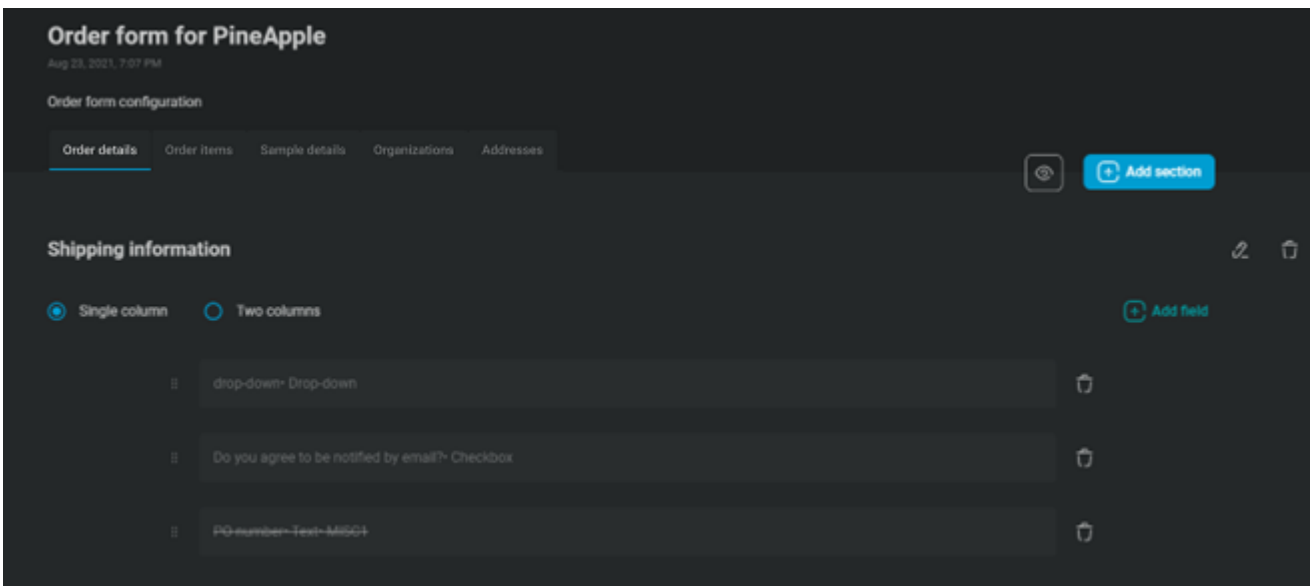
And/or additional sample fields (customizable): relevant for each sample in the order.
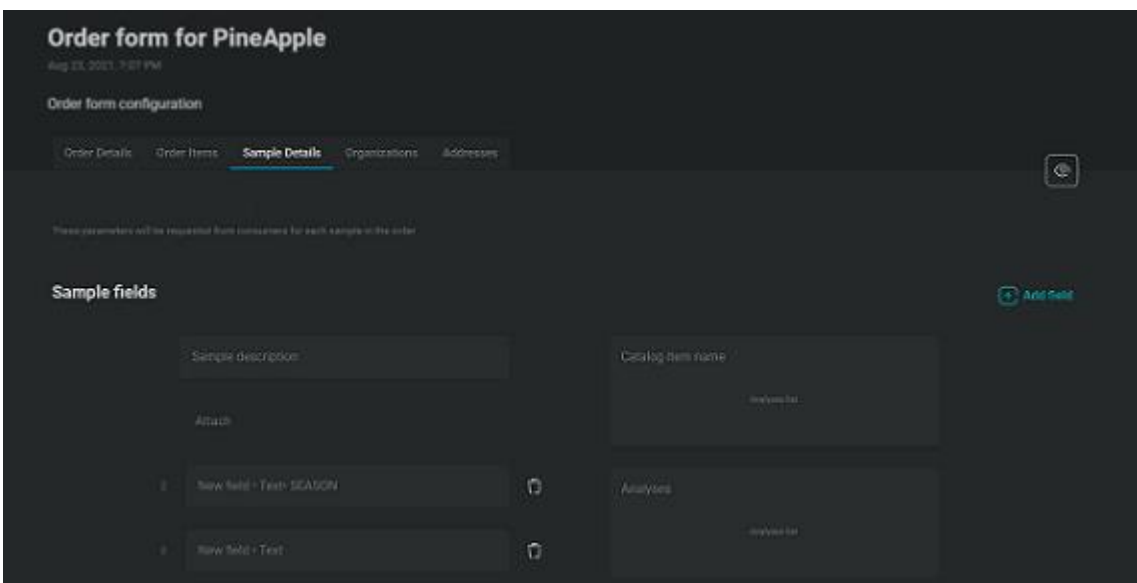
This order form should be associated with your organization (or all organizations).
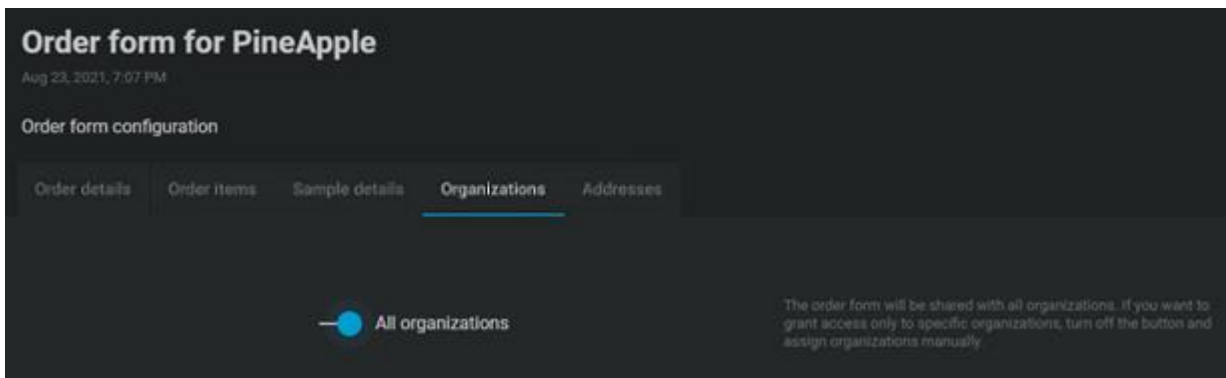
And this organization should have the access to this order form.

5. Orders

When all necessary data is configured by administrators, a consumer can create new orders.

First, the order creator should select an organization for the order and specify the order owner. Creators can add orders for themselves or for another order owner, if there are permissions for that. Once an organization is selected, the consumer can choose one of the order forms associated with this organization (if several order forms are available).

To create orders for themselves, users should have the *Manage own orders* permission in this organization. It means that the following users can do it:

- Global administrators
- Lab users
- Org administrators of this organization
- Consumers of this organization
- Members of this organization with a custom role that contains the *Manage own orders* permission

To create orders for other users, creators should have the *Manage consumer's orders* permission in this organization. It means that the following users can do it:

- Global administrators
- Lab users
- Org administrators of this organization
- Members of this organization with a custom role that contains the *Manage consumer's orders* permission

The list of available organizations also depends on these permissions.

On the next step, the order creator can select one or several catalog items (samples) that are available for this order form, specify the list of analyses, add comments, attachments, fill sample fields if they exist. Sample fields are specified by administrators on the Order Form Details – Sample Details tab. Only active catalog items with analyses included to the active catalogs of this order form can be selected. Also, additional analyses can be selected, if they are present in catalogs of this order form, even if they are not included to the added catalog item.

Consumers can add empty (custom) samples that are not based on catalog items, but in that case, the order creator should add comments to describe what should be done in the laboratory. Or they can add custom analyses. These analyses should be present in active catalogs of this order form, inside active catalog items.

Order creators can remove not needed samples and analyses. Also, on this step, users can see details of catalog items and analyses according to names and descriptions configured for catalogs used by this order form.

On the next step, consumers can select organization addresses that were specified for this organization (invoice, report, CC addresses) based on the organization settings. Or add a custom address if it is allowed by administrators on the Order Form Details – Addresses tab. And fill additional order fields. The sections with these additional fields are specified by administrators on the Order Form Details – Order Details tab. Addresses can be configured on a per organization basis.

Addresses specified as default for the organization will be displayed by default. If an administrator turned on the Auto-apply for any address, it cannot be changed by consumers.

On the last step, order creators can see all ordered items, addresses, and order details fields. They can check and save the order as a draft or submit it.

When the order is submitted, it becomes available for the laboratory. All the provided information is synced (ordered samples with analyses, comments, addresses, and additional fields values). The laboratory users can create ordered samples in the LIMS and make tests. Also, laboratory users can open the Exchange Portal and see the details of orders, order attachments.

For empty (custom) samples, the laboratory can add all needed analyses according to discussions with the order owner/creator.

The progress can be seen on the Order Details dialog. Also, on this dialog, users can add order attachments and participate in discussions.

On the Order Details dialog, users can print labels, print the entire order, submit draft orders, edit orders in the Draft or Submitted statuses, clone orders (reorder), or cancel not onboarded yet orders (they will be moved to the Draft status or completely deleted).

The Order Details contain the Ordered Items tab, where it is displayed what was ordered by users of the portal.

The Order Details tab displays addresses, additional order fields and general order information.

On the Discussions tab, users can discuss the order with administrators or laboratory users.

On the Attachments tab, users can add attachments not to specific samples, but to the entire order, view, or remove them. Also, on this tab sample attachments and attached to messages files and images are listed.

The results and results reports are available for consumers on the Order Details screen – Results tab. Reports can be automatically pushed by the Crystal Report generator or manually added by LIMS laboratory users in the portal. On this tab, users can see what was done in the laboratory. All information on this tab is sourced from LIMS, except for the sample details fields.

Users can see orders associated with this user (as the owner) and orders created for organizations in which users have the *View orders list* permission. If users have the *Manage own orders* permission in the organization for which the order was created, they can manage their orders: edit, submit, reorder. Users with the *Manage consumer's orders* permission in the organization for which the order was created can manage all organization orders. Only users with the *View results* permission can open the Results tab.

Exchange Portal sample statuses depend on statuses mapping with LIMS sample statuses configured by global administrators (see the Portal Customization section of this document).

Order statuses depend on the following rules:

- Draft – The order is under work now; the laboratory does not know about this order.
- Submitted – The order appears on LIMS and the laboratory can onboard it.
- In progress – When at least one sample in the order has the portal "Received" status or the "In progress" status (according to the mapping). It means that the laboratory has onboarded the order and it cannot be edited anymore.
- Completed – When all samples in the order have the portal "Completed" status (according to the mapping). The order is considered completed in the laboratory.

Roles and permissions

Available functionality of the portal depends on the role and specified for this role permissions. Users can have different roles in different organizations in which they are members.

1. Global administrators
   a. For such administrators all functions and pages are available. They have all mentioned in this document permissions.
      i. Exception: manually adding result reports.

b. They are not members of organizations; they can work with all organizations.

c. Only Global administrators can customize the portal, set the Global admin or the Laboratory user roles to other users, manage catalogs, and add organizations.

d. Only Global administrators can allow other users to have access to all organizations with any global role.

e. Only Global administrators can share order forms with all organizations.

f. Only Global administrators can receive support requests.

2. Organization administrators

    a. All functions except the following ones are available for Organization administrators:

        i. Portal customization

        ii. Catalog management

        iii. Adding new organizations

        iv. Setting the Global admin or the Laboratory user roles to other users

        v. Setting All organizations access to users

        vi. View audit trails

    b. Only Global administrators and Organization administrators can manage user roles.

    c. Only Global administrators and Organization administrators can set the Organization administrator role to other users.

    d. This role can be given on a per organization basis or globally for all organizations.

3. Laboratory users

    a. Have access only to the Consumer part of the portal.

        i. All permissions except for the *View audit trails* permission

    b. They are not members of organizations; they can work with all organizations.

    c. Laboratory users can receive this role from administrators or can be LIMS lab users.

        i. LIMS lab users

            1. Automatically synchronized LIMS users.

            2. Have permissions of the Laboratory role.

            3. Can be set as Global administrators and take both roles.

            4. Only LIMS lab users can upload results reports manually.

4. Consumers

    a. Have access only to the Consumer part of the portal.

    b. Can add and manage orders only for themselves.

    c. Cannot see hidden fields.

    d. Cannot view audit trails.

    e. This role can be set on a per organization basis or globally for all organizations.

5. Users with custom roles

    a. Have custom roles on a per organization basis or one global role for all organizations.

    b. Permissions depend on their roles. See more details in the Roles Management section of this document.
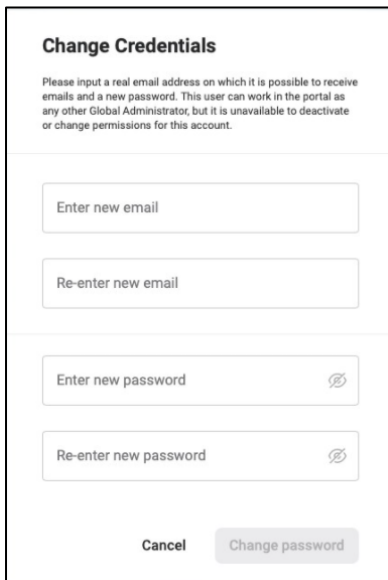
Get Access to the Administrative Portal

When there are no users in the system, only the Master Administrator can get access to the application.

Please use the following credentials to sign in:

      Email: master-admin@changecredentials.com

      Password: MASTER

Input these credentials on the **Sign in** screen and click the **Sign in** button. You will be redirected to the **Change Credentials** dialog.

You need to change the password and the email for the Master Admin account. Please input a real email address on which it is possible to receive emails, and a new password. This user can work in the portal as any other global administrators, but it is unavailable to deactivate this account or change permissions for it. Write down these credentials for future needs.

After the credentials are changed, you need to upload the license and configure the application. Please see corresponding sections in this document for more details.

When the system is already configured, there are 4 ways to become an Exchange Portal's administrator:

- Another administrator can invite you.
  - o You will receive an email with instructions.
  - o Follow the link in the email and sign up.
- Self-registration
  - o If self-registration is allowed, you can click the **Sign up** button at the right-top corner on the **Sign in** screen and sign up.
    -
  - o Once another administrator gives you administrative permissions, you can access the Administrative part of the Portal.

- LIMS lab users
  - If you have access to the LABWORKS Enterprise LIMS, your account will be automatically synchronized with the LABWORKS Exchange Portal.
  - A Global administrator can set the Global Admin role to you.
  - Follow links to orders in LIMS or sign in using the Sign In screen.
    - Please note that you need to restore your password for the first time to open the application using the Sign in screen.
- SSO users
  - It depends on the system settings. For some organizations, users can have accounts in another system and they can get the access to the portal using these accounts.
  - It is similar to other applications, where you possibly used the Google account for signing in.
  - After you registered as SSO user, another administrator can give you administrative permissions.

To get the access to the Administrative part of the portal, you need to be a global administrator, org administrator, or a user with custom role that includes at least one administrative permission.
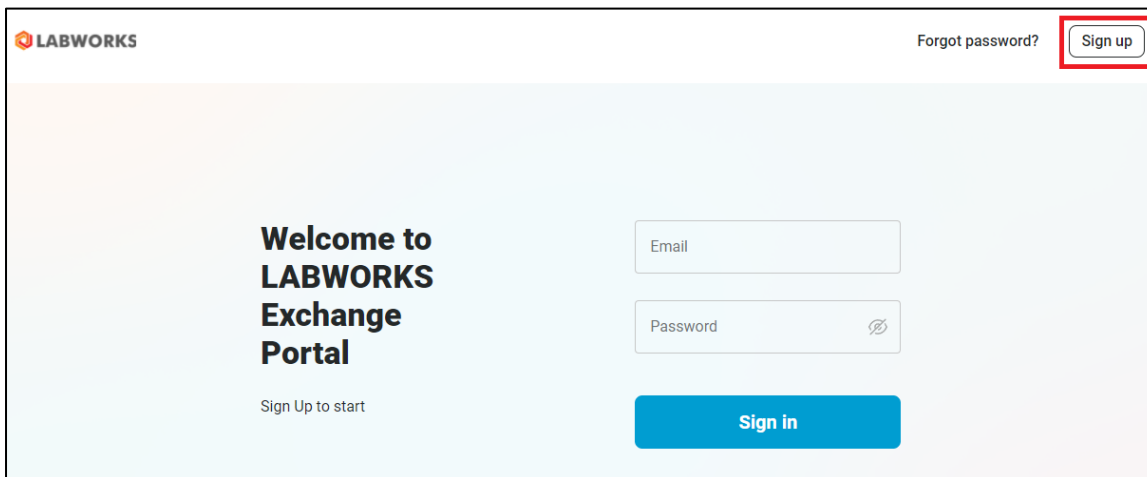
Users Registration Workflow

User registration workflow depends on the following settings:

- Self-registration – If it is enabled, users can register in the portal by themselves.
- When self-registration is allowed, users can receive the Active status if the auto-approve setting is enabled.
- If the auto-approve setting is disabled, self-registered users should be approved or rejected by administrators.
- Users can be invited by administrators regardless of the self-registration and auto-approve settings.
- Special rules apply to SSO users; see the SSO Users section of this document.

Self-registration flow

If self-registration is disabled, users can register only using the SSO or be invited by administrators.

If self-registration is enabled, users can click the **Sign up** button on the **Sign In** screen, open the **Sign Up** dialog and register in the system.


If the email domain part is specified in the list of domains in active organizations, the user is added to the system as a member of these organizations, receives the Pending status and the Consumer role in these organizations.
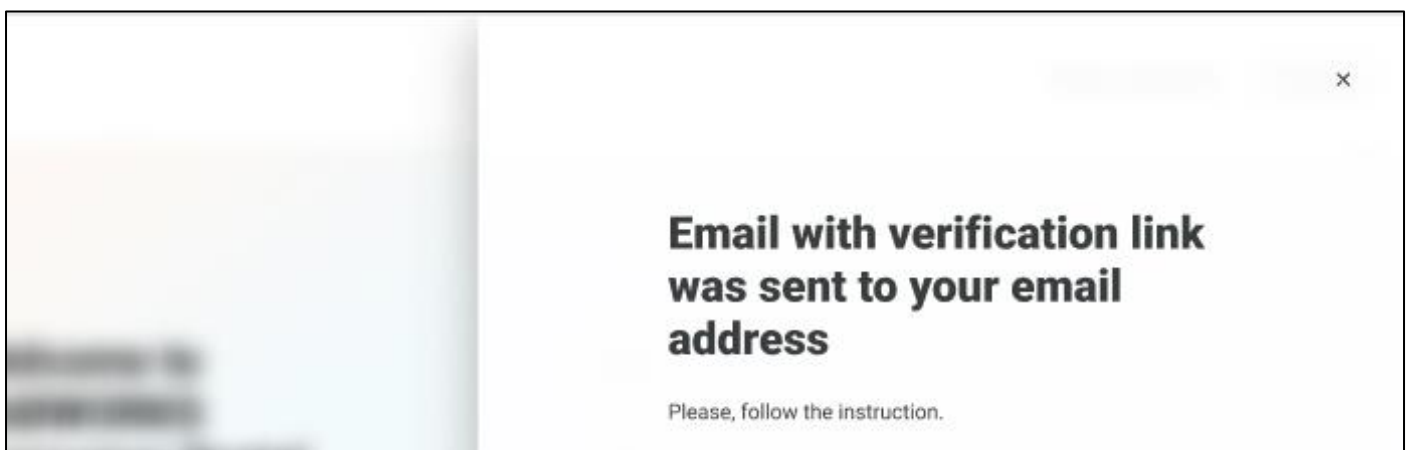
The email with the email verification link is sent to this user. The user should click this link and he/she will be redirected to the Sign In screen with the notification that the email is verified. Until that, the user cannot work with the application, orders cannot be created for him/her.

Further workflow depends on the auto-approval setting.

If the auto-approve is enabled, the user will receive the Active status and can input credentials on the **Sign In** screen, click the **Sign in** button and log into the portal.
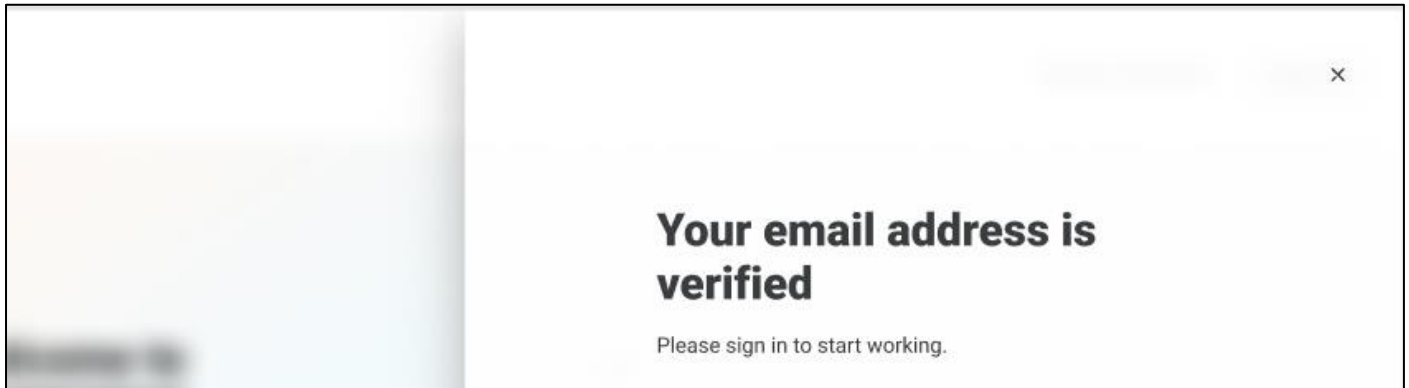

If the auto-approve is disabled, the user status will be kept as Pending even after the email verification.
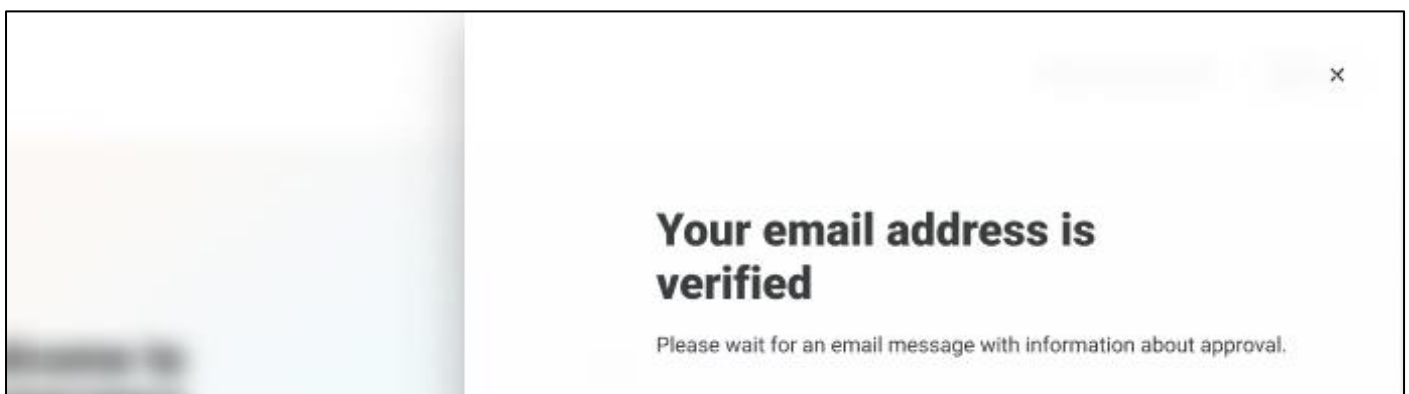
Administrators should open the **User Details** screen for this user, click the "…" menu icon, activate or deactivate the user. To open the User Details, the administrator should have the *View user details* permission inside at least 1 associated with this user organization. To change the user status, the administrator should have the *Change user record* permission in all the organizations of this user.
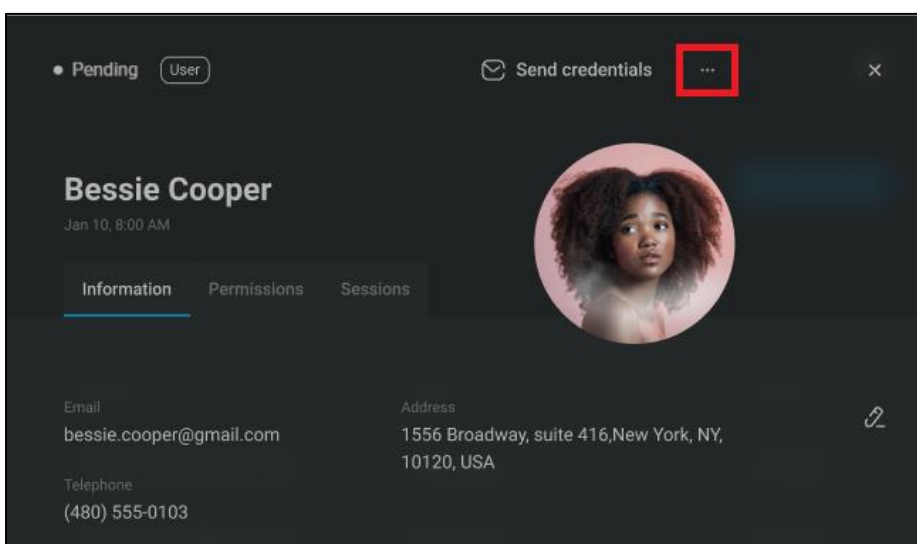
If the administrator wants to allow the user to work with the portal, the Activate menu option should be selected.
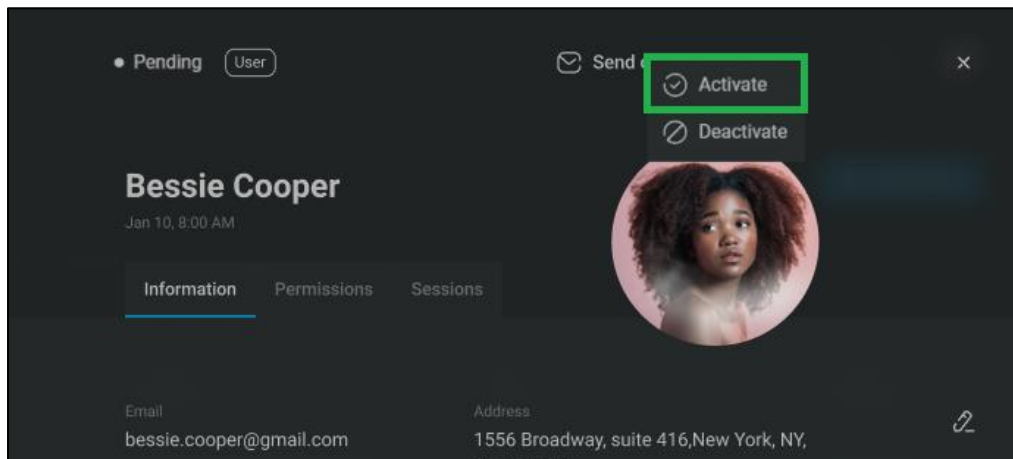
The user will receive the Active status and will be notified that he/she got access to the portal. The user just needs to open **Sign In** screen and log in with his/her credentials

If the administrator wants to reject the user, the Deactivate menu option should be selected.
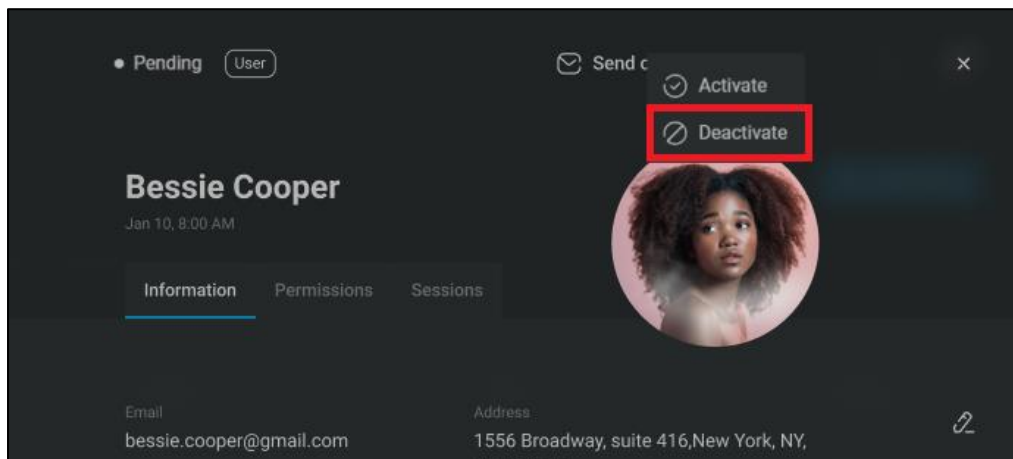

The user will receive the Inactive status and will not be able to work in the system until he/she is activated by administrators.

Invitation flow

Regardless of the self-registration and auto-approval settings, users can be invited to the portal by administrators.

Administrators that have the *Invite user* permission can click the **Invite user** button on the Users Management page and open the **Invite User** dialog.
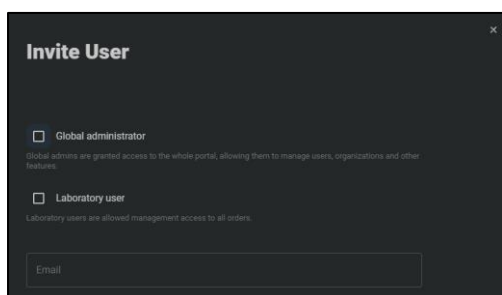
On this screen, they can specify the user's email, organization, and the role.

If the user already exists in the system, his/her data will be updated and the user will be notified about that.

If the user is not registered yet, the invitation email will be sent to this email address.
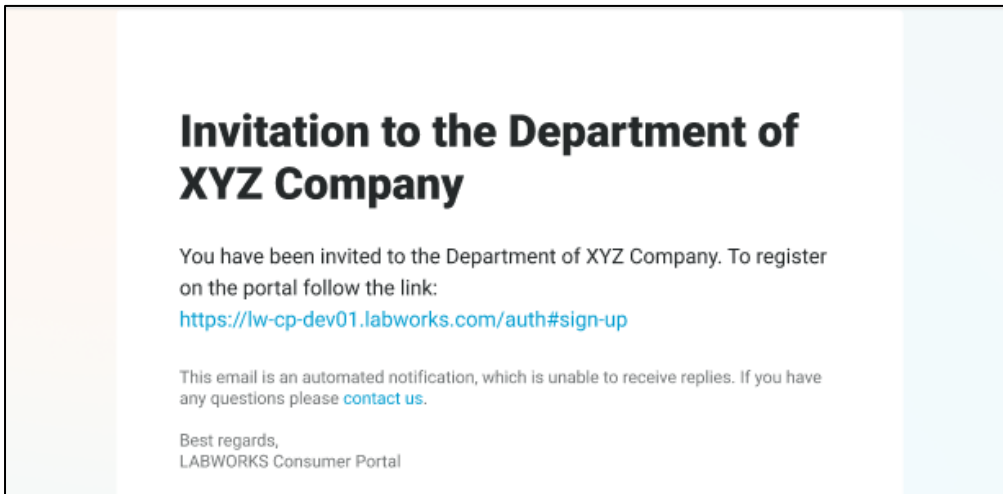
The user should click the invitation link and the **Sign Up** dialog will be open. After the user registers, the email is considered as verified, user status becomes Active, and the user can log into the portal via the **Sign In** screen. Until the user went through the sign up process, this account has the Pending status and the email is not verified, so the user cannot work with the application.

Another way to invite a new user is to open the **Organization Details** dialog for an organization where you want to invite the user. Open the Users tab and click the **Add** button. To open the Organization Details, the administrator should have the *View organization details* permission. To invite users, the *Invite user* permission in this organization is needed.
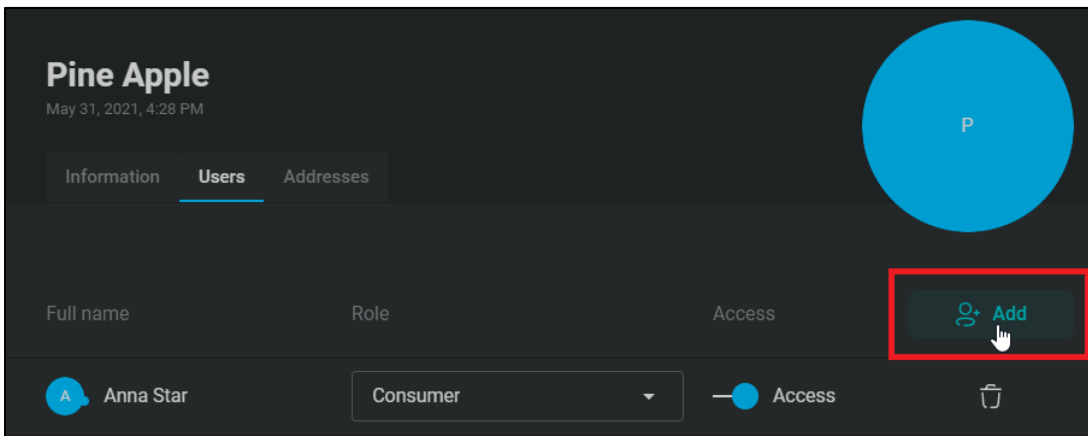
After clicking the **Add** button, the **Add User** dialog will be open, where the admin should input the email address of the user, press Enter, and specify the user role in this organization.

Click the **Invite** button, If the user is not registered yet, the invitation email will be sent to this email address. Further workflow is the same as for users invited via the **Invite User** dialog described above.

LIMS lab users

LIMS laboratory users do not need to register in the portal. They are automatically synchronized and considered as portal users with the LIMS lab user role.

LIMS lab users can open the portal in 2 ways: direct links from LIMS and via the **Sign In** screen as other users.

Clicking the Order management button in the header of the LIMS will open the Exchange Portal's list of orders in a separate browser tab and will log the laboratory user automatically.
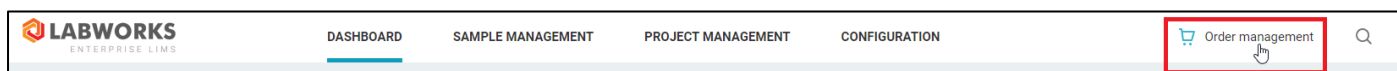
Also, LIMS laboratory users can click links to Order IDs to open the default tab of the **Order Details** or the Number of attachments to open the Attachments tab of the **Order Details**.

To log in as other users via the **Sign In** screen, first of all, LIMS lab users should reset their passwords using the **Forgot password?** button from the **Sign In** screen of the Exchange Portal or the link provided in the warning message if any password was used to sign in.

The **Forgot password?** dialog will be open. Then users should input the email address from the LIMS account and click the **Send link** button.

The email with the password restoration link will be sent to this email address. If click on it, the **New Password** dialog will be open. Users need to specify and confirm a new password, and click the **Change password** button.
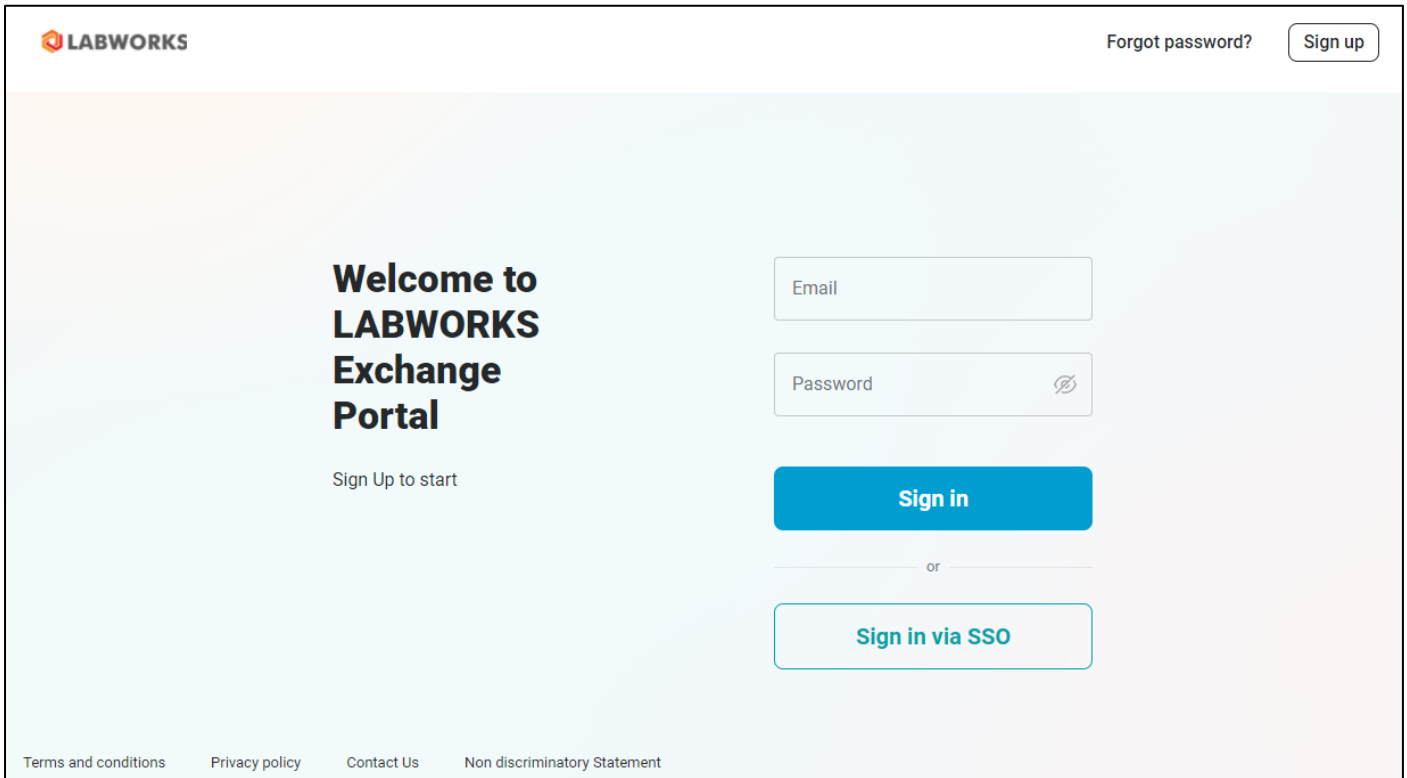

Then they can enter the email and the new password on the **Sign In** screen and click the **Sign in** button to log into the portal. The new password can be used later for authorization in the portal. It can work together with direct links from LIMS.

Sign In

LABWORKS Exchange Portal is a web application, so you need a web browser to access the system.

Supported desktop browsers:

- Google Chrome
- Safari

Supported mobile browsers:

- Chrome
- Safari

Please make sure that your browser is updated to the latest version.

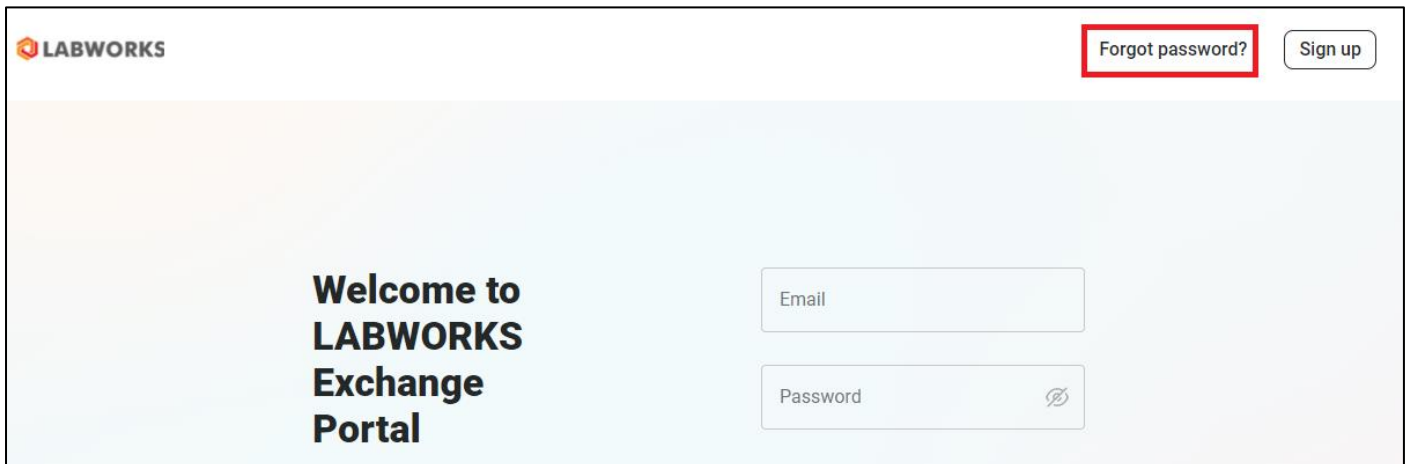The following information is required to access LABWORKS Exchange Portal:

1. URL-address of LABWORKS Exchange Portal in your network.
2. Your email address and password.

The first screen you see when you access the LABWORKS Exchange Portal for the first time is the **Sign In** screen. Once you fill up the form and click the **Sign in** button, the system will validate provided credentials and allow you to access the main interface of the application.

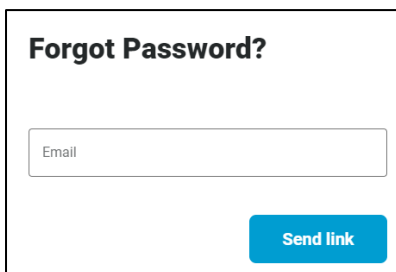Only users with the Active status can sign in and work with the portal.

Restore password

If you forgot your password, you can click the **Restore password** button at the right-top corner on the **Sign In** screen.
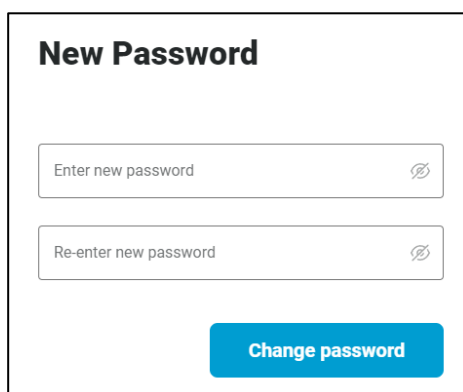

Then you should input your email address and click the **Send link** button.

You will receive an email with the link. If you click on it, the **New Password** dialog will be open. Specify and confirm a new password, and click the **Change password** button.

Enter your email and the new password on the **Sign In** screen and click the **Sign in** button to log into the portal.
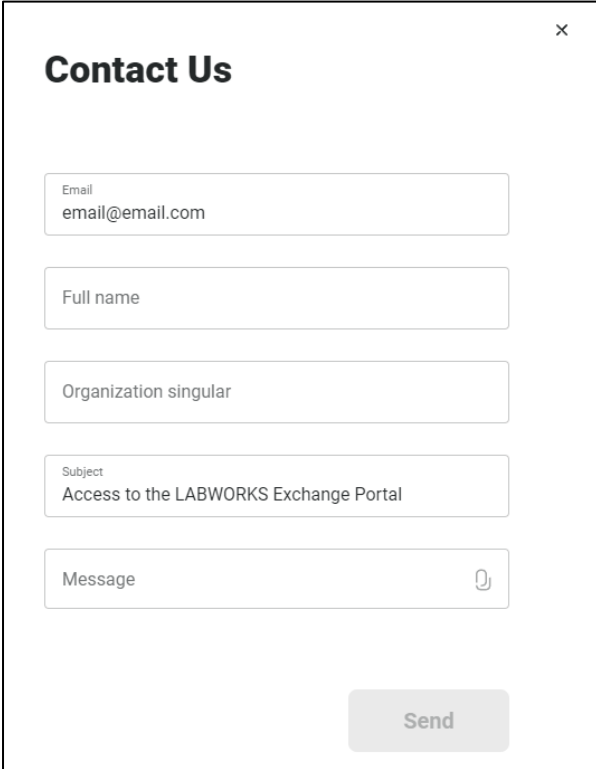

Sign In – Contact Us

If you have any questions, you can write a support request.

Click the **Contact us** button at the bottom of the **Sign In** screen.

The **Contact Us** dialog will be open.

Fill in the email address to which you want to receive a reply, your full name, organization. Specify the subject and your question. You can add attachments to your message if needed. Click the **clip** icon and select one or more files on your computer.

Click the **Send** button to send a support request and wait for the answer.

SSO Users

If a global administrator configured the SSO authentication, users can get access to the portal, using their accounts in the SSO provider.

Open the **Sign In** screen and click the **SSO button** (it will be labeled according to the system settings, e.g., "Sign in via Google").

If an account with the user's email address already exists in the portal, the user can authorize in the SSO provider and be signed into the Exchange Portal. The account should have the Active status in the portal.

If such an account does not exist in the portal, clicking on the **SSO button** will redirect the user to the **Sign Up** screen for SSO users.
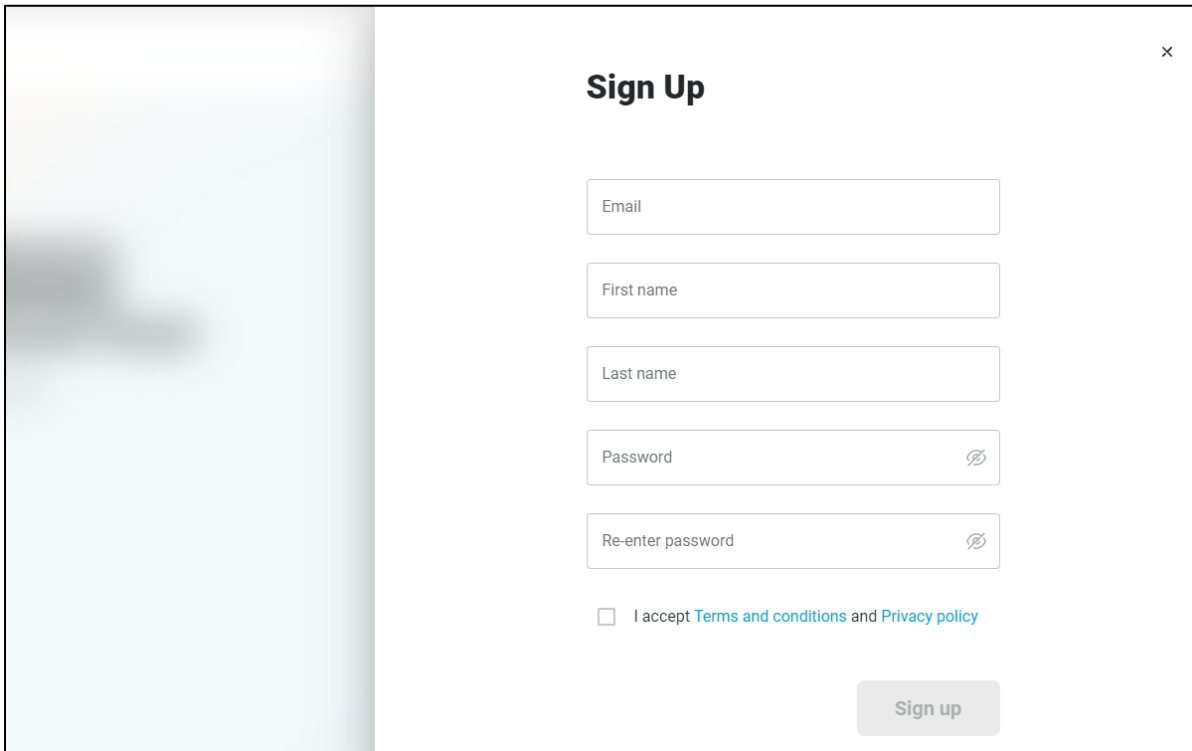
All fields will be filled with values from the SSO provider if they are specified in this system. The user needs to fill all other required fields, accept the Terms and Conditions and Privacy Policy, and click the **Sign up** button. The email domain part should present in the list of domains inside any active organization. SSO users can register with the predefined Consumer role as members of these organizations. Administrators can open SSO **User Details** and change permissions if needed.

The user will be signed into the portal after clicking the **Sign up** in successful cases.

The following rules are applied to SSO users:

- Email verification is not needed for them. We assume that using SSO accounts works the same as email verification.
- The self-registration setting does not affect SSO users. New users will be redirected to the Sign Up even if the self-registration is not allowed.
- The auto-approve setting does not affect SSO users. Even if the auto-approve is disabled, new SSO users receive the Active status. We assume that we trust the SSO provider users.
- SSO users have the same features of internal pages as other portal users according to their roles. They can use usual workflow to logging in, can reset passwords, etc.
- Successful login or registration of SSO users work as verifying emails and auto-approval of users with the Pending status if administrators' approval is needed.
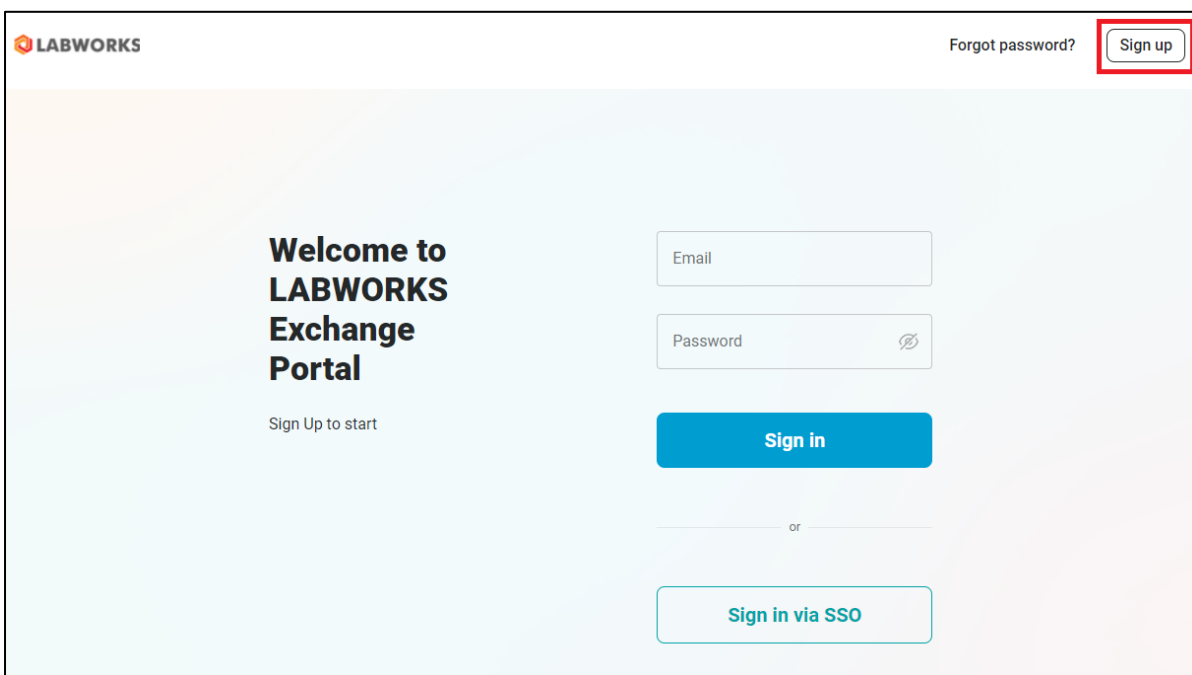
Sign Up

If self-registration is allowed, you can open the **Sign Up** screen and register in the portal.

To open the screen, click the **Sign up** button at the right-top corner of the **Sign In** page.
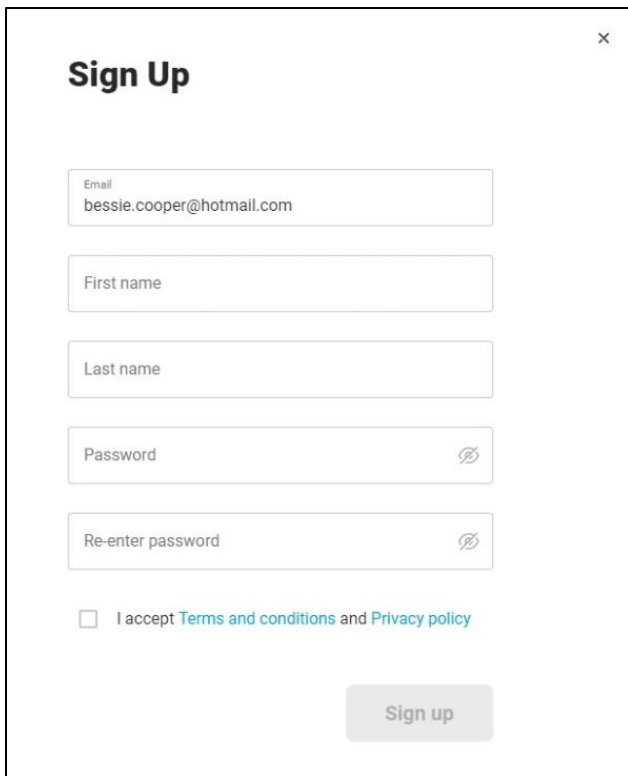
Please specify your email, first name, last name, and the password.

You can open and read the Privacy Policy and Terms and conditions and you should accept them.

Click the **Sign up** button to register in the portal.

If auto-approve is allowed by administrators, you will receive the verification email. Click the provided link and verify your email address. And then you will be able to input your credentials and sign into the system via the **Sign In** screen.

If auto-approve is restricted, wait until you receive the approval from administrators.

The domain of your email address will be mapped with domains specified by administrator for organizations, and you will become members of these organizations.

If you were invited by an administrator, you will receive the invitation email. Click the link in this email, and you will be redirected to the **Sign Up** screen where you can enter all your data and click the **Sign up** button. After that, you will receive the Active status and you can sign into the portal and be a member of the organization in which you were invited with the specified user role. Email verification is also needed.

If self-registration is restricted, you can have the access to the portal only by invitations from administrators or via SSO.
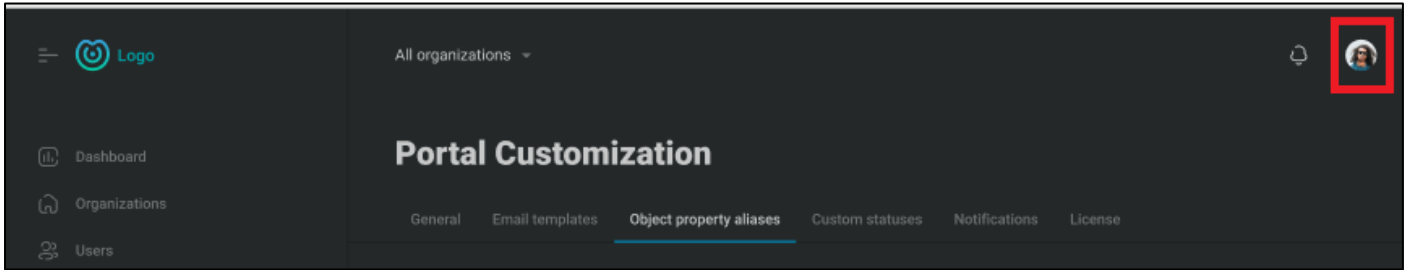
Select Portal

If a user has permissions to the Administrative part of the application and to the Consumer part of the application, the Select Portal screen will be open after signing in.
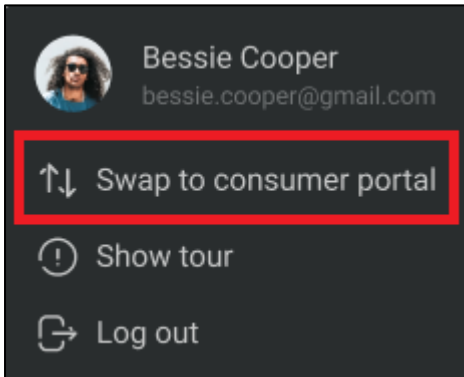
Select the Administrative Portal "dark" option to navigate to the Administrative part of the application.
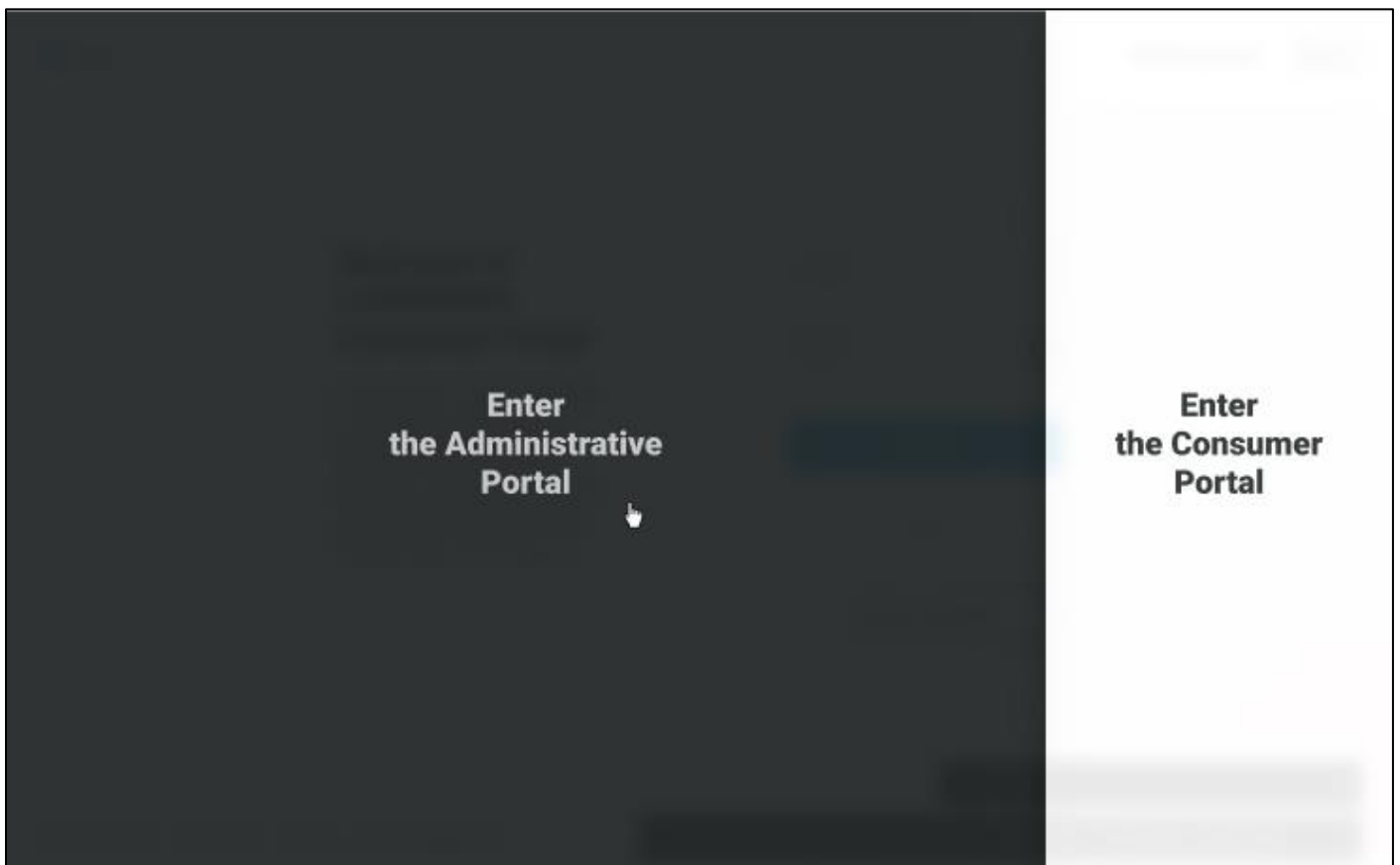
If you are working with the Administrative part of the portal and want to go to the Consumer part of the portal, click the user logo at the top-right corner of the screen to open the **User menu**.

Select the Swap to consumer portal menu option.

Repeat these steps if you are working with the Consumer part of the portal and want to go to the Administrative part.

Application Interface

Upon a successful sign in to the LABWORKS Exchange Portal, the admin is navigated to the main area of the application interface. All screens in this area share the same layout consisting of two components:

1. **Administrative Header** is shared between all screens. It contains organization global filter, notifications and the user profile menu.

   a.
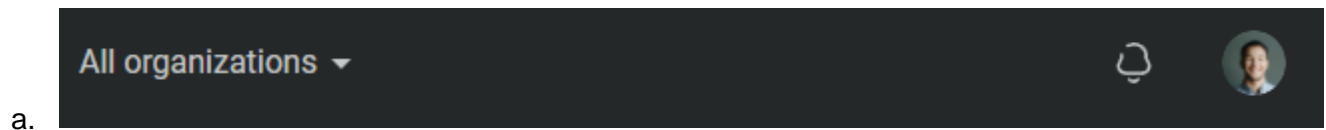
2. **Left menu** displays screen-specific information.

   a.
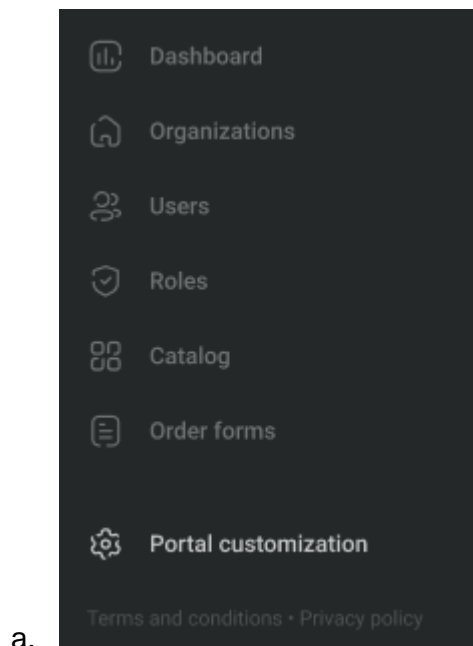
The **Left menu** is used to switch between the areas (depending on the current administrator permissions):

1. Dashboard with quick links to all screens and the full list of notifications.
2. Organizations Management serves for working with organizations.
3. Users Managements serves for viewing, inviting, or editing users.
4. Roles Management serves for configuring roles and permissions in the system.
5. Catalog Management serves for creating and managing catalogs with available for ordering samples and analyses.
6. Order Forms serves for configuring fields and adding catalogs for orders.
7. Portal customization serves for configuring the portal and its global settings.

Click the Privacy policy link to open and read the Privacy policy; click the Terms and conditions link to open and read the Terms and conditions.

Additional footer link may be configured by administrators. Click on it to see the details.
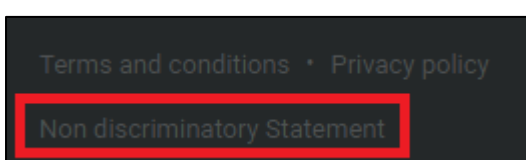
By clicking the **bell icon** , you can open the **Notifications pop-up** and see your system notifications.
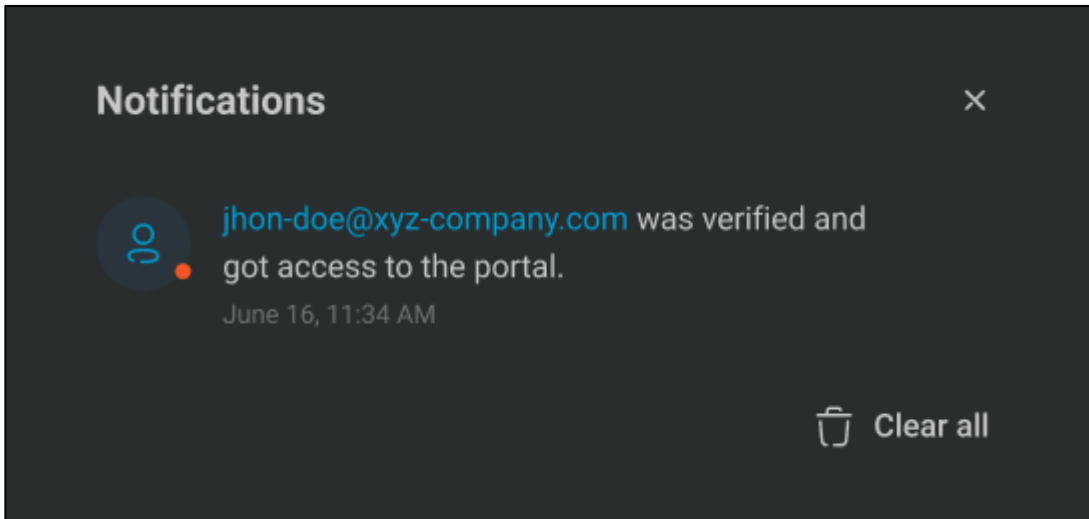

When there are unread notifications, the bell icon and these items are marked with the orange circle.

On the **Notifications pop-up,** there are only notifications received in bounds of the Notification timeframe, that was configured by global administrators on the Portal Customization page. It means that some notifications will disappear after this timeframe is reached. E.g., if 24 hours timeframe is configured for the system, you will see only notifications received during the last 24 hours.

Click the **trash** icon to remove not needed items or click the **Clear all** button to delete all notifications.
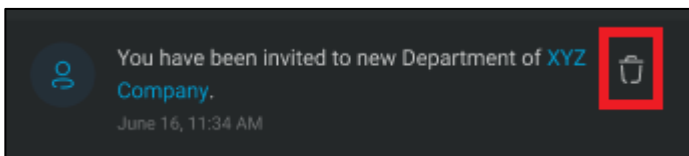
You can filter all screens by selecting a specific organization in the Organization filter.
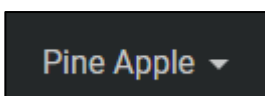
Or work with all organizations in the system.
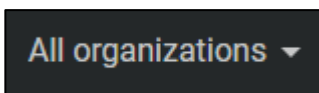
The **User menu** is used to navigate to the **Administrative Profile** screen and sign out of the application to end the session. You can also open the tour with tips how to work with the Administrative part of the portal or swap to the Consumer part.

Bessie Cooper
bessie.cooper@gmail.com

↑↓ Swap to consumer portal

ⓘ Show tour

⤇ Log out
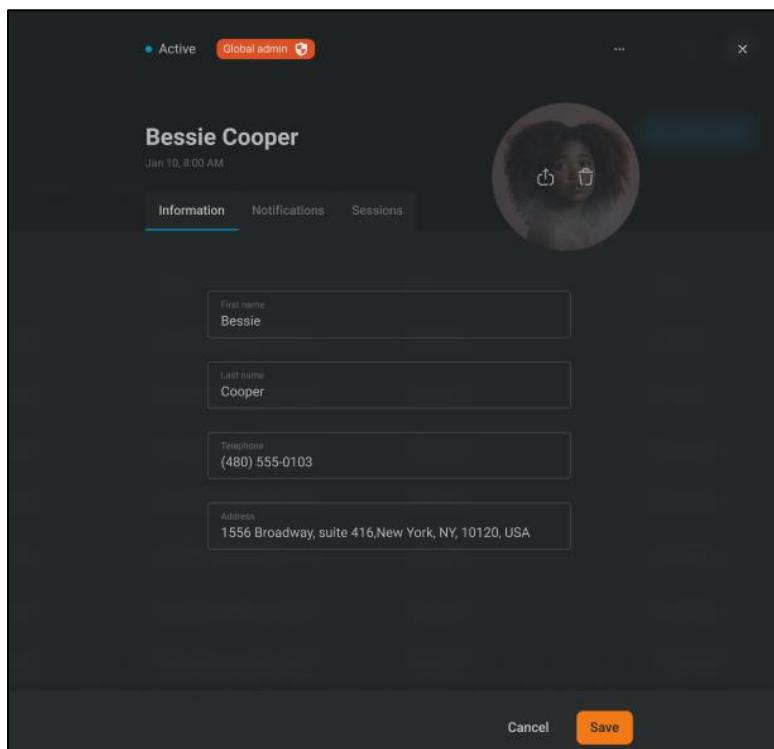
Administrator Profile
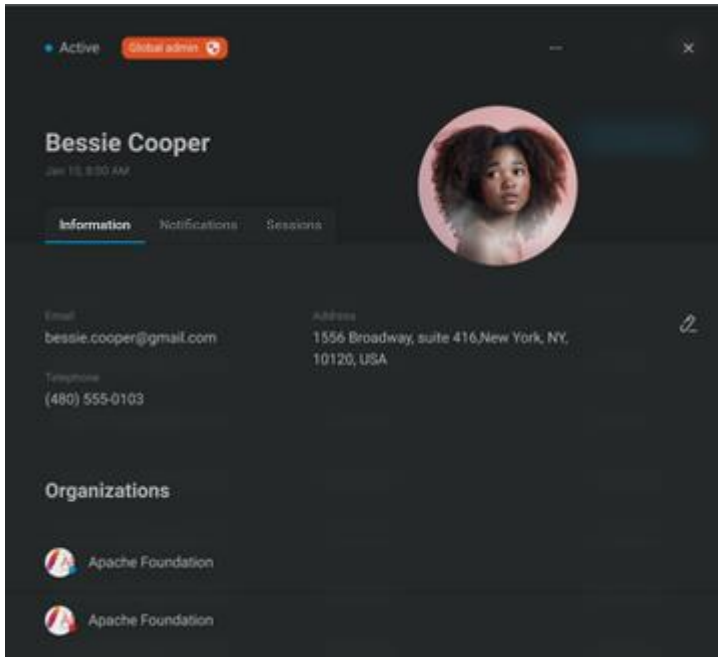
Click on your logo in the Header of any page to open the **User menu** .

Click on your name in the User menu and the Administrative Profile will be open.
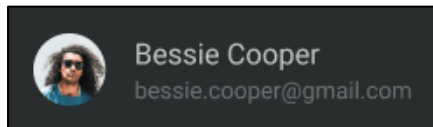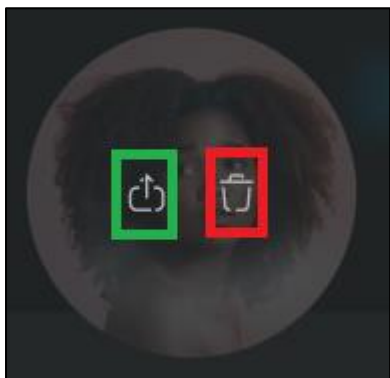

On the **Information tab**, you can see or edit your data, see organizations you are a member of.
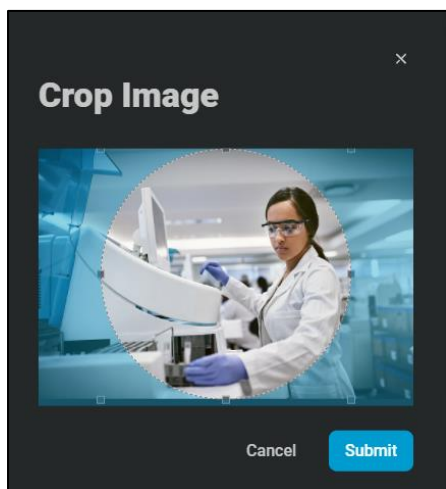
To edit your information, click the pencil icon . The edit mode for the dialog will be enabled.

The avatar can be uploaded on this screen. Click the upload icon to select the picture on your computer or device, or click the trash icon to remove the picture.

Once you selected the picture on your device, the **Crop Image** dialog is open.

You can crop the image and click the **Submit** button to upload the logo. This picture will be used in the portal for this account.

Update all other data if needed and click the **Save** button to apply changes.

On the **Notifications tab**, you can configure receiving of email notifications and internal notifications.
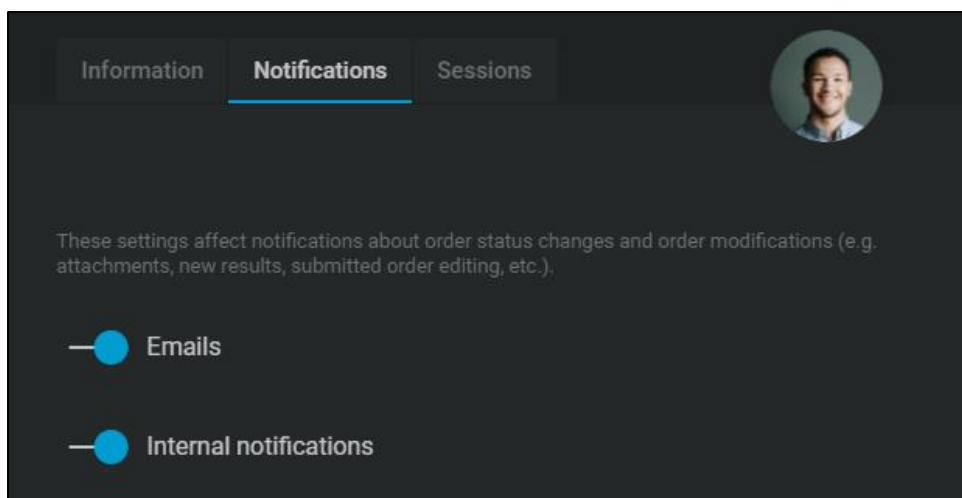
- If you switch off the **Emails** toggle, you will not receive email notifications on your email address.
- If you switch off the **Internal notifications** toggle, you will not receive internal notifications (see details in the Application Interface section of this document about the **Notifications pop-up**).

These settings will affect not all notifications, but only notifications about changes of your orders:

- Orders creation
- Order status updates
- Submitted order modifications (e.g., attachments, new results, order editing, etc.)

Notifications logic depends on global configurations by administrators: notifications can be sent to the order owner, organization administrator, specially selected laboratory users, or organization CC addresses on specified by admins events. Notifications about new messages in discussions depend on whether you follow the discussion or not. Administrators can configure only the default state of it. You can switch it on/off on a per order basis (see more details in the Order Details – Discussions tab section of this guide). All users will receive general notifications regardless of your personal settings on the Consumer Profile (for example, invitations to organizations).

Open the **Sessions tab** to see all your sessions.
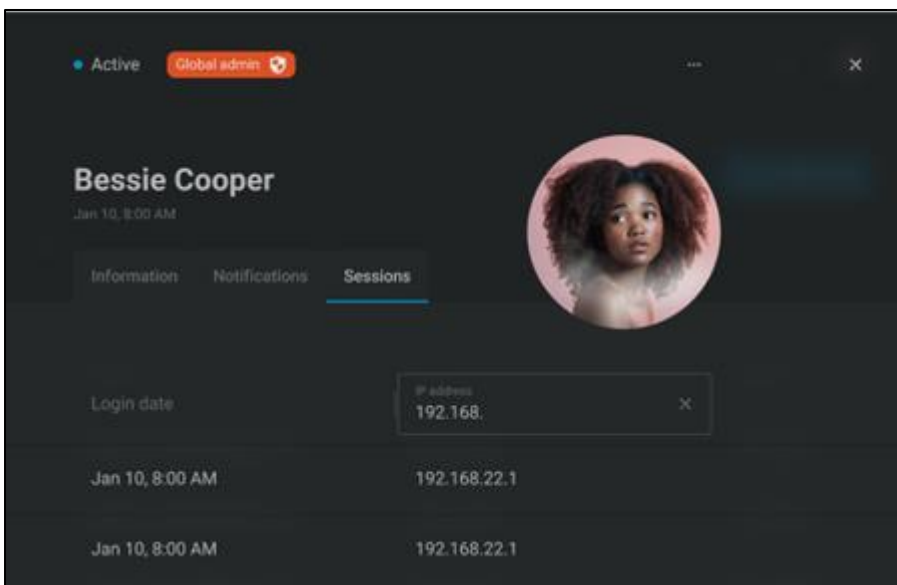
If you want to change the password, click on the "…" icon, select the Change password option, and open the **Change password** dialog.
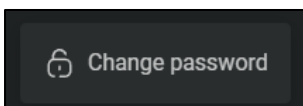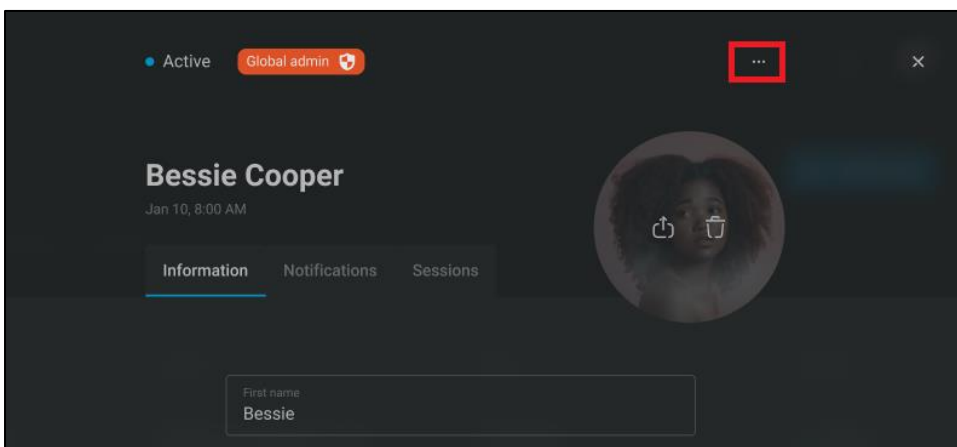
On the **Change password** dialog, you need to input your current password and a new one.

Click the **Change password** button to confirm changes or cancel the operation by clicking the **Cancel** button.

Administrative Dashboard
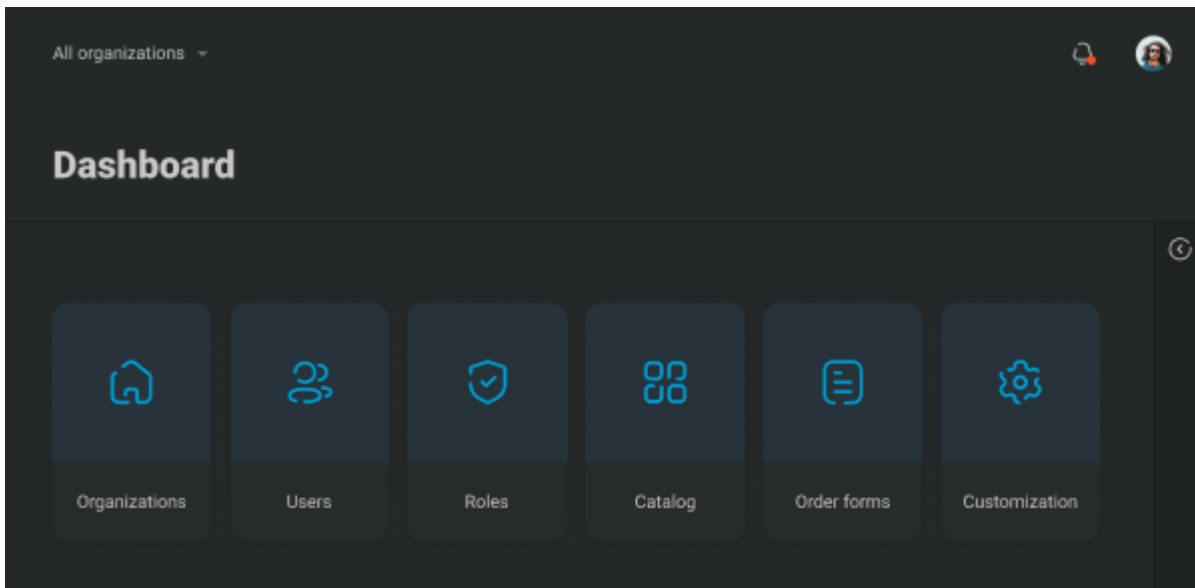
From this page you can open any screen of the Administrative Portal (depending on permissions) and see all your administrative notifications.
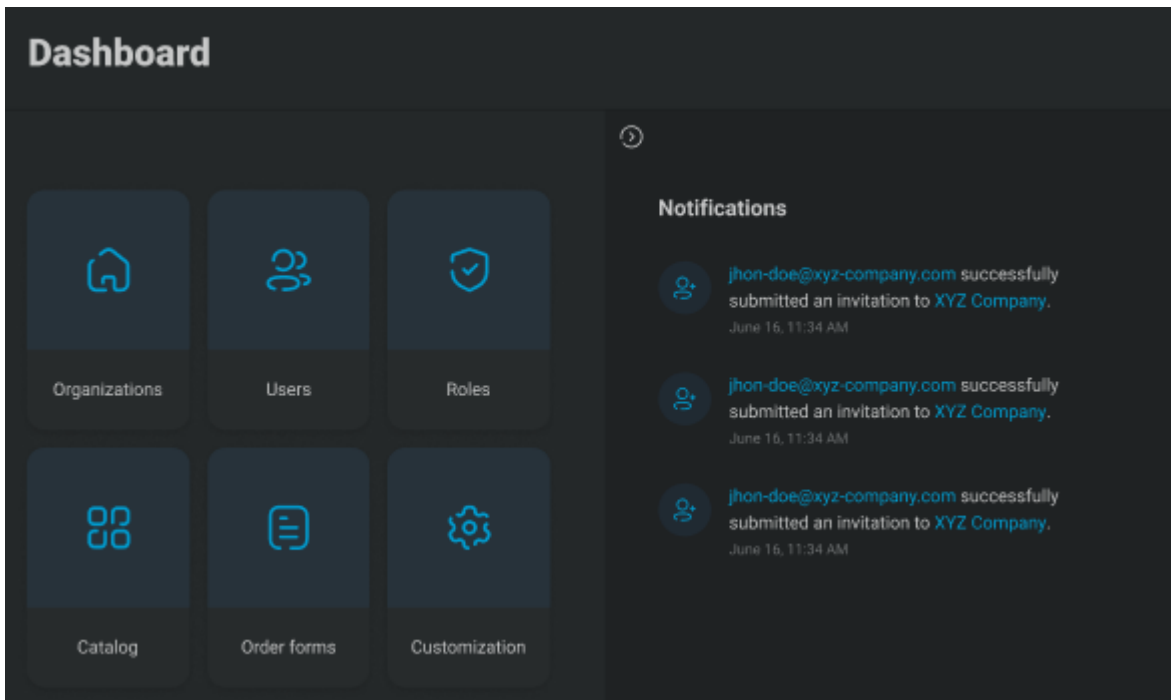
The panel with notifications can be expanded or collapsed by clicking the arrow icons .

Here, users can see the history of all notifications regardless the timeframe setting that was configured on the Portal Customization page, and items cannot be removed.

Portal Customization
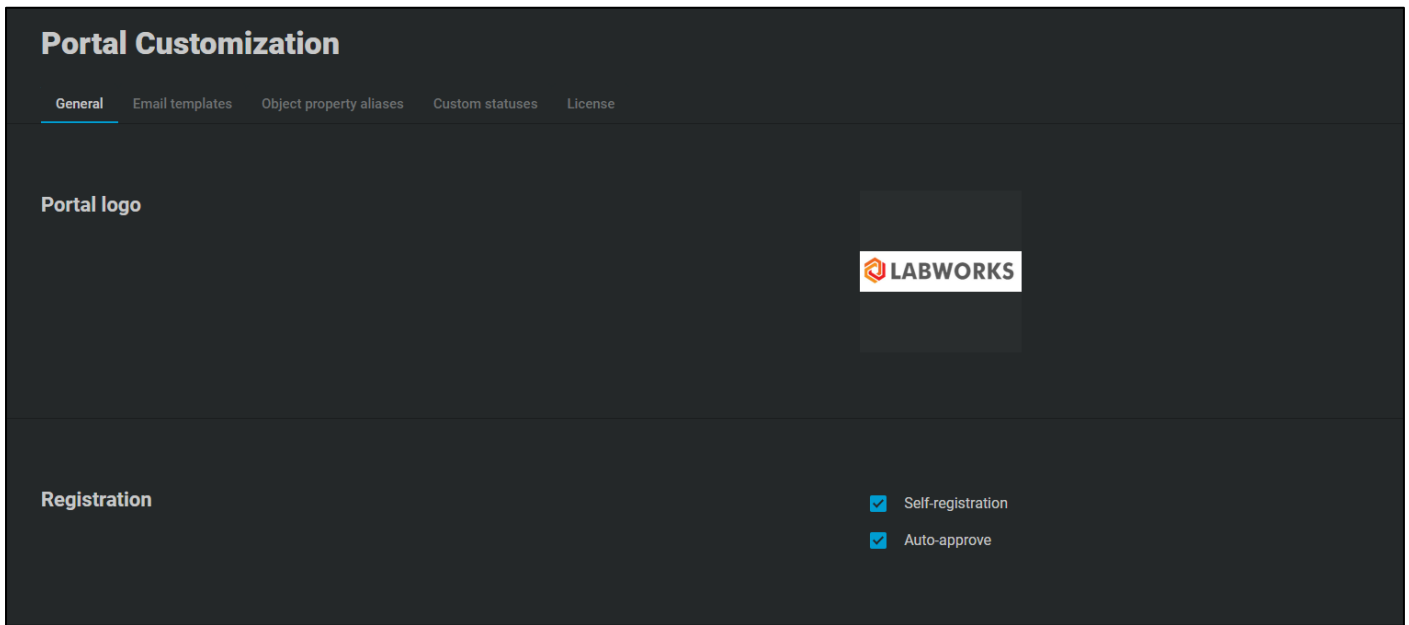
The Portal Customization screen allows you to configure and brand your application. Only users with the Global Administrator role can customize the portal.

Click on the **Customization** button at the bottom of the Left menu to open the **Portal Customization** screen.
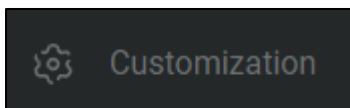
The Portal Customization page is divided into several tabs.

General tab

The General tab serves to configure general portal settings. Please do not forget to click the **Save** button to apply your changes.

Branding

On this tab you can brand the application:

- Upload logo of your portal and set the application title.
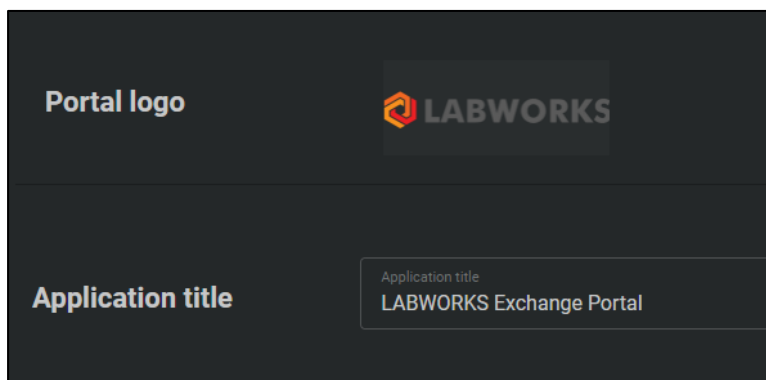
- Specify the title and message that will be displayed on the Sign In page.
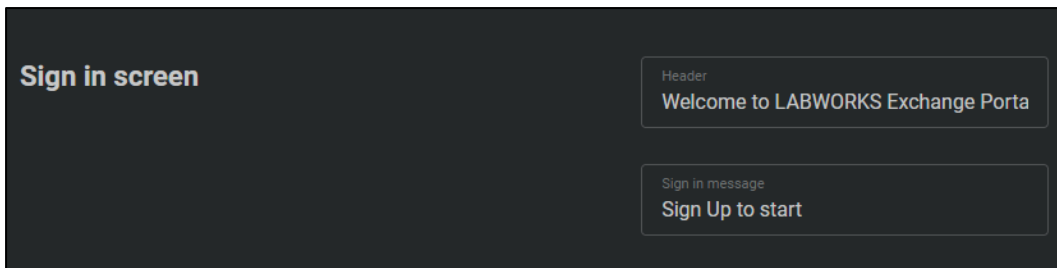
- Upload the Privacy Policy and Terms and Conditions. Please use html or txt files. You can click on the uploaded file to check how the page will look like.

- Set limitation of the maximum size of logos and attachments in MB. This limitation will be applied to logos/avatars, attachments that can be added on the Order Details - Attachments tab, Order Details - Discussions tab, Create Order Wizard - attachments for order items, reports attached manually on the Order Details - Results tab.
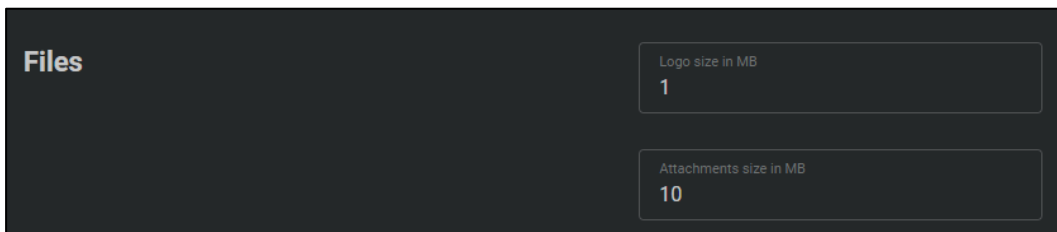
- You can add an additional footer link with the needed for your organization content, for example, some statement required by laws. Configure whether the link should be displayed on internal pages only, on the Sign In screen (public page) or on all screens. Input the label of this link. And upload html or txt file with the content.
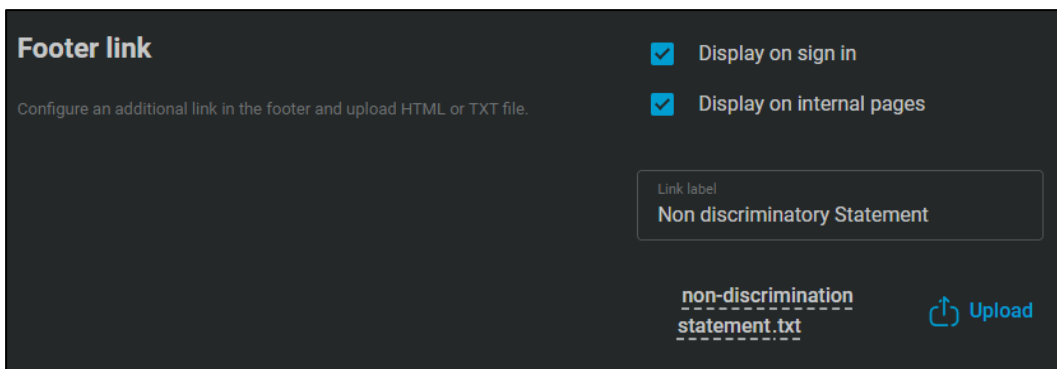
- You can add and customize the display of the data collection statement that we use cookies or collect data when users use the site. Check the checkbox if you want the banner to be displayed. Enter text. And after saving the changes, all users will see a banner with this text until they close it.

- o
- o It will look this way:

- o

Order settings

- Specify the order prefix that will be used before order numbers for all orders in the system and configure whether order attachments should be pushed to LIMS. For example, if you set the order prefix as "ORD-", order numbers will look as ORD-1, ORD-2, etc.

- o
- If you need to receive compliance to view analyses results from users, you can check the "Require user consent to display results" checkbox and configure the text. In that case, all users will see a special banner with this text and they have to click the Consent button to see tables with analyses and their results on the Order Details – Results tab. But they always can download result reports.

- o
- o It will look this way:

- o

- • Consumers are able to search orders by predefined parameters: Order number, Sample ID, LIMS Sample ID from LIMS, or the owner's name. Also, you can configure additional properties that can be used for the search: select one or several options from all available order details fields and sample details fields configured for portal's order forms by other administrators. These settings will apply to all organizations so we recommend consistency when setting up custom order fields – in other words, recommend administrators to use the same field name across different order forms if the field has the same meaning across the order forms, even if they are used in different organizations.

    - o
    - o It will look this way:

    - o
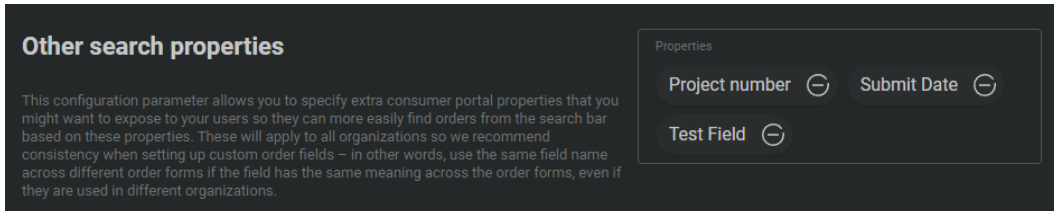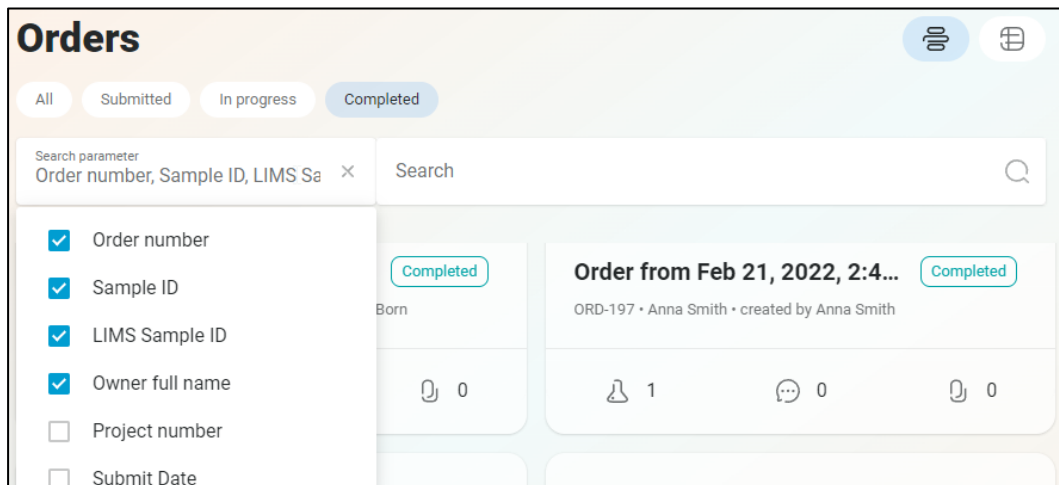
Registration section
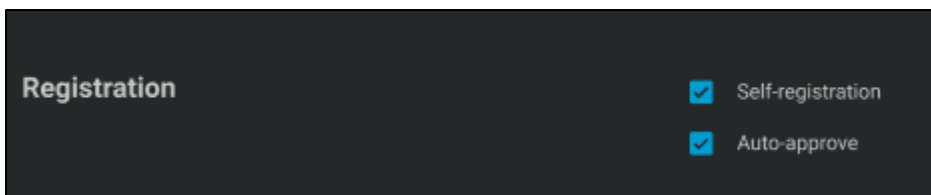
This section serves to configure users' registration workflow. You can check the Users Registration Workflow section of this document for more details how your settings will work.
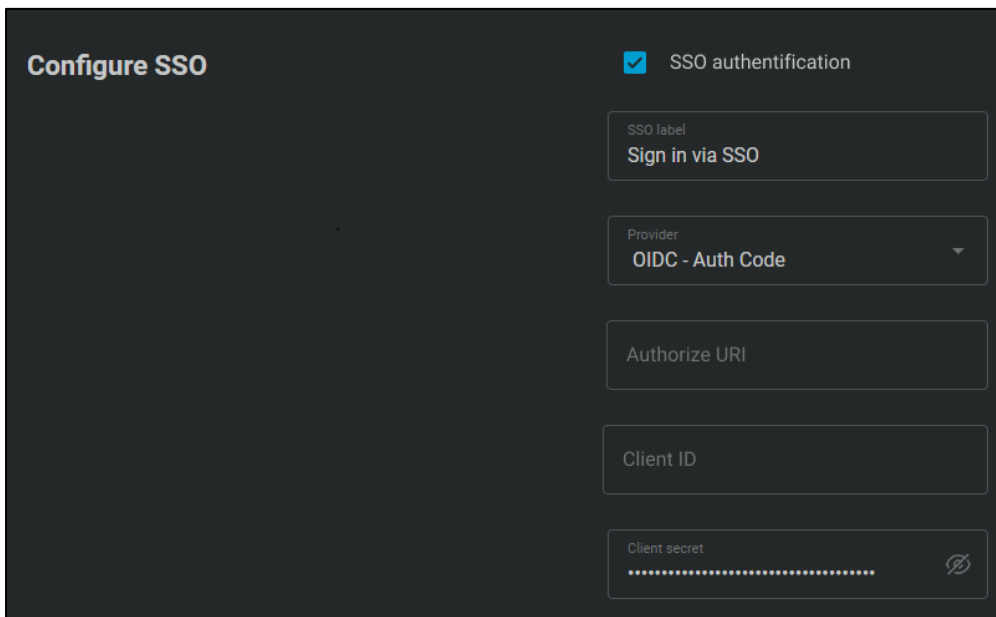
If self-registration is allowed, users can independently register in the system.

If self-registration is restricted, users can get the access to the portal only by invitations or via SSO.

If auto-approve is turned on, new self-registered users will receive the "Active" status after registration, they can login and use the portal.

If auto-approve is turned off, new users will receive the "Pending" status after registration, and administrators should approve or reject them on the **User Details** screen.

Configure SSO section

You can allow and configure Single Sign On in this section. If you use a third-party system with user authentication, you can integrate it with the Exchange Portal and allow users of your SSO provider to log into the portal.

Please specify the button label that should be displayed on the **Sign In** screen, select protocol, add the authorize URI, your Client ID, and the Client secret key.
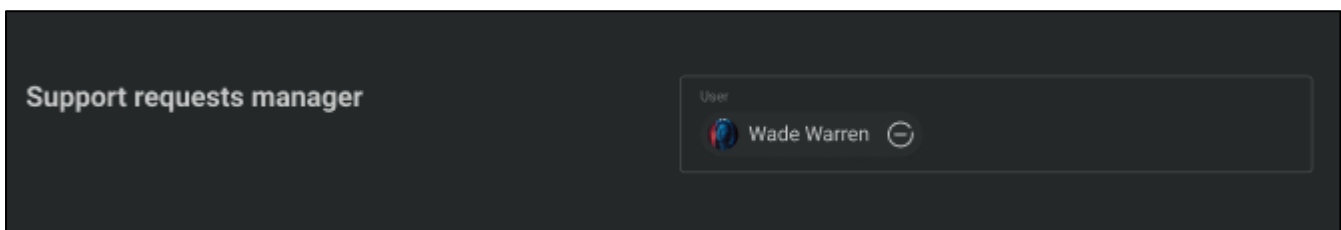
If SSO is enabled, users can get access to the portal using their accounts from the specified protocol, so they do not need to register in the portal via usual workflow.

In the current version, the one protocol is available – OpenID Connect.

Please note that the email domain part should be present in the list of domains inside any active organization to allow new users to register via SSO. Create an organization for SSO users or add domains to any existing organization.

See more details in the SSO Users section of this document.

Support requests manager section

Please specify here users that should receive emails about support requests sent by the Contact Us dialog. Only global administrators can be selected. By default, the Master Admin account is specified as a receiver of support requests.

Email templates tab

On this tab, administrators can configure emails that will be received by users in the following cases:

- When a new user has been invited to an organization.
- When an existing user has been invited to an organization.
- When a user resets the password.
- When a user should confirm his/her email.
- When an order status has been changed.

Also, you can configure the text for the footer of these emails and all other email notifications.

Use available variables according to the hints. They will be replaced with real values in real emails.

You can get a test email by clicking on the **Send test email** button. Please check your inbox and see how emails will look like for receivers.

Invitation to organization for new users can be sent in the following cases:

- The user was invited to the system by administrators using the **Invite User** dialog.

- The user was invited to the system by administrators using the Organization Details – Add user dialog.
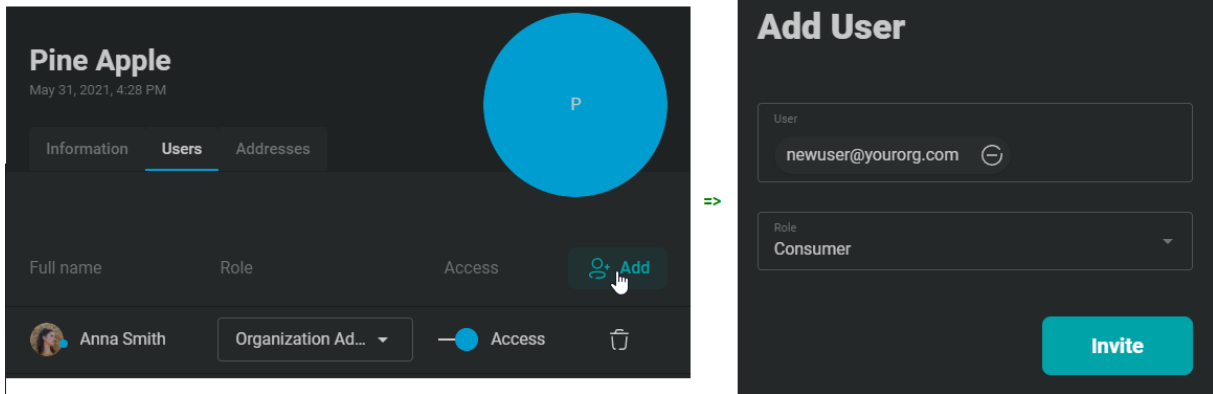
- The user was invited during the organization creation.

This email should contain the invitation link to allow users to register in the portal.

Invitation to organizations for existing users can be sent in the following cases (let's assume that the user is a member of organization A):

- An administrator can open the Organization B details – Users tab, click the Add button, select one or several existing users on the Add User dialog.
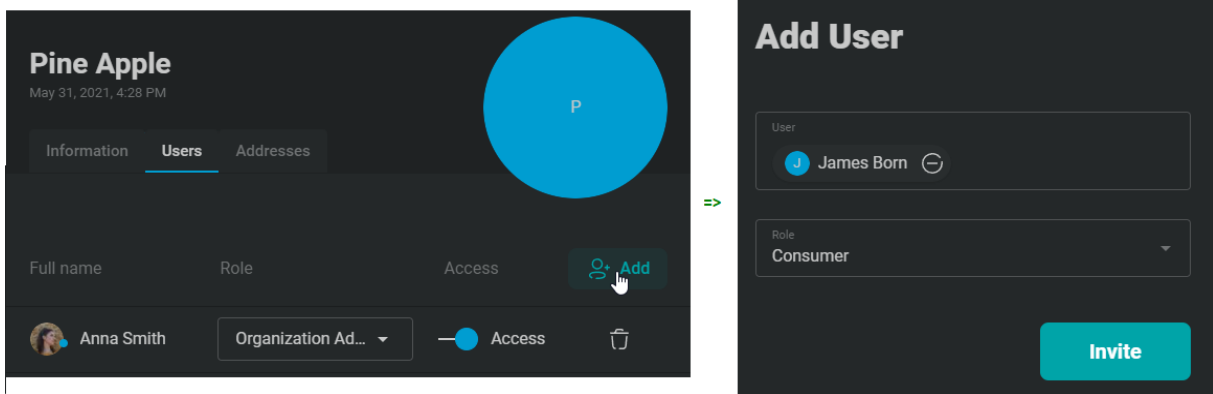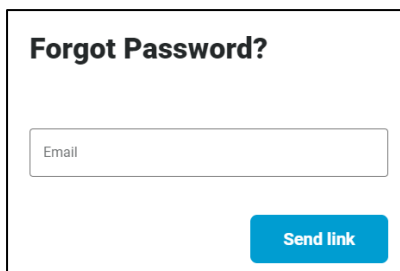
- An administrator can open the User Details – Permissions tab, click the Add button, select the organization B on the Add Organization dialog.
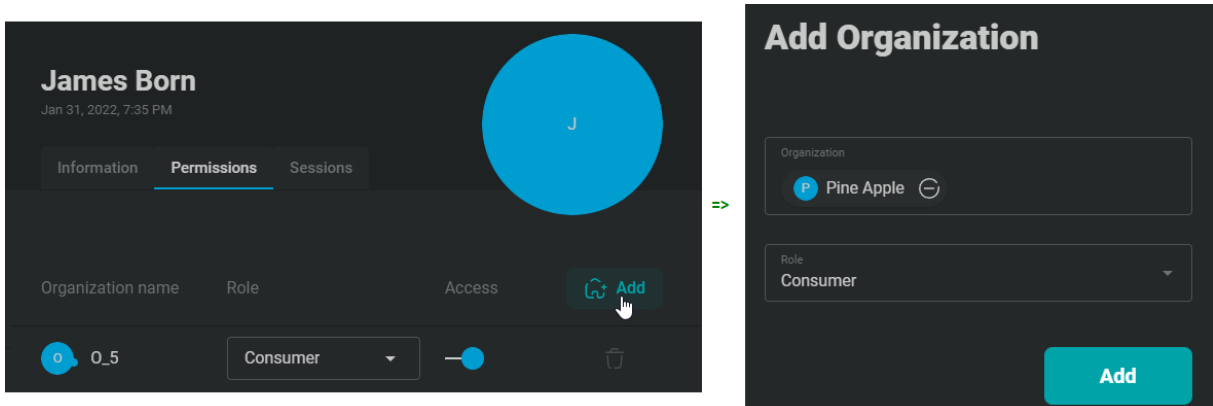
In these cases, the user will be invited to the organization B and we need to notify him/her about that. The invitation link is not needed.

The Reset password email is needed when a user wants to reset the password.

- The user can click the Forgot password? button on the Sign In screen and input the email address on the Reset password dialog.

- An administrator can click the Send credentials button on the User Details.
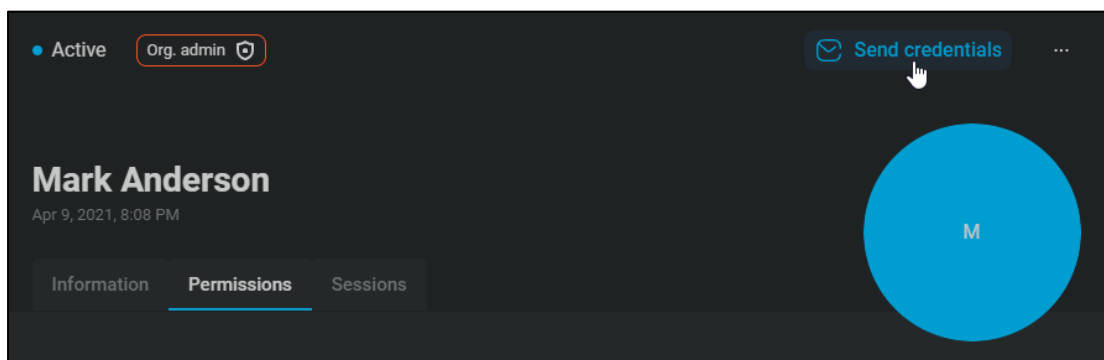
The Confirm email template is needed to provide users with the email verification link. All users (except SSO users and synced LIMS lab users) should confirm their emails to get access to the portal.

The Order status template is used for notifying users about order status changes. These notifications depend on settings (see the Portal Customization – Notifications tab section of this document).

Other email notifications cannot be configured, they are hard-coded. For example, notifications about activating or deactivating users, emails about mentions in discussions, about new orders and order results received from LIMS.

Click the **Save** button to apply your changes.

Object property aliases tab
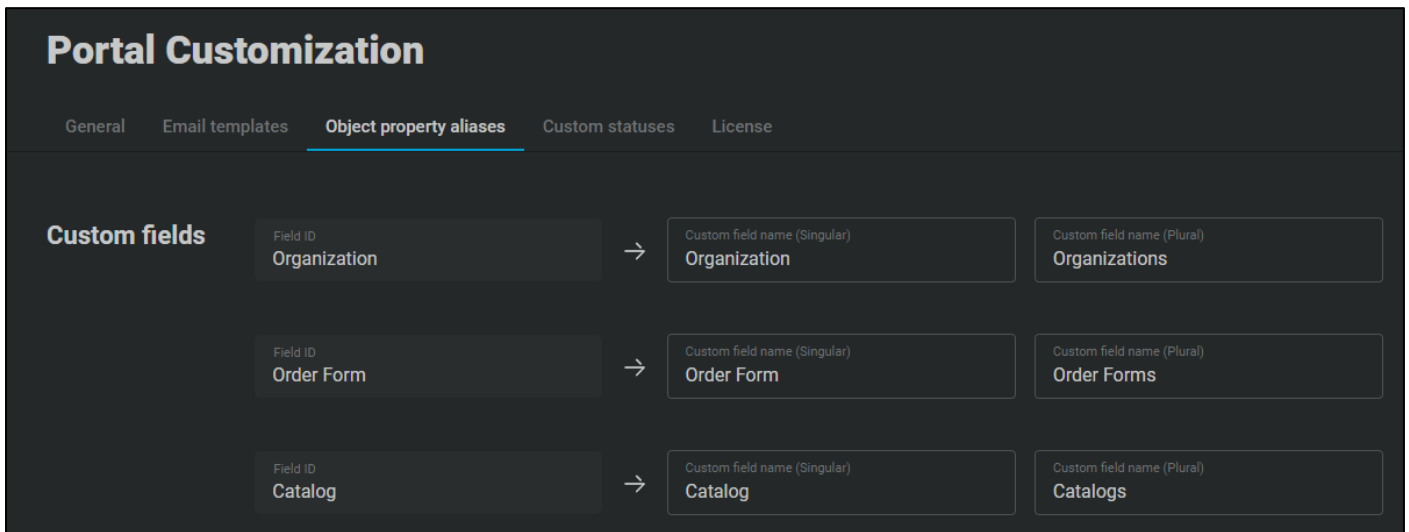
On this tab, administrators can configure aliases that will be used for naming different properties in the portal. For example, if you configure aliases for the Organization parameter as "Department" and "Departments", users will see these terms in the portal.
In this document, we will use default terms for all properties.

Click the **Save** button to apply your changes.

Custom statuses tab
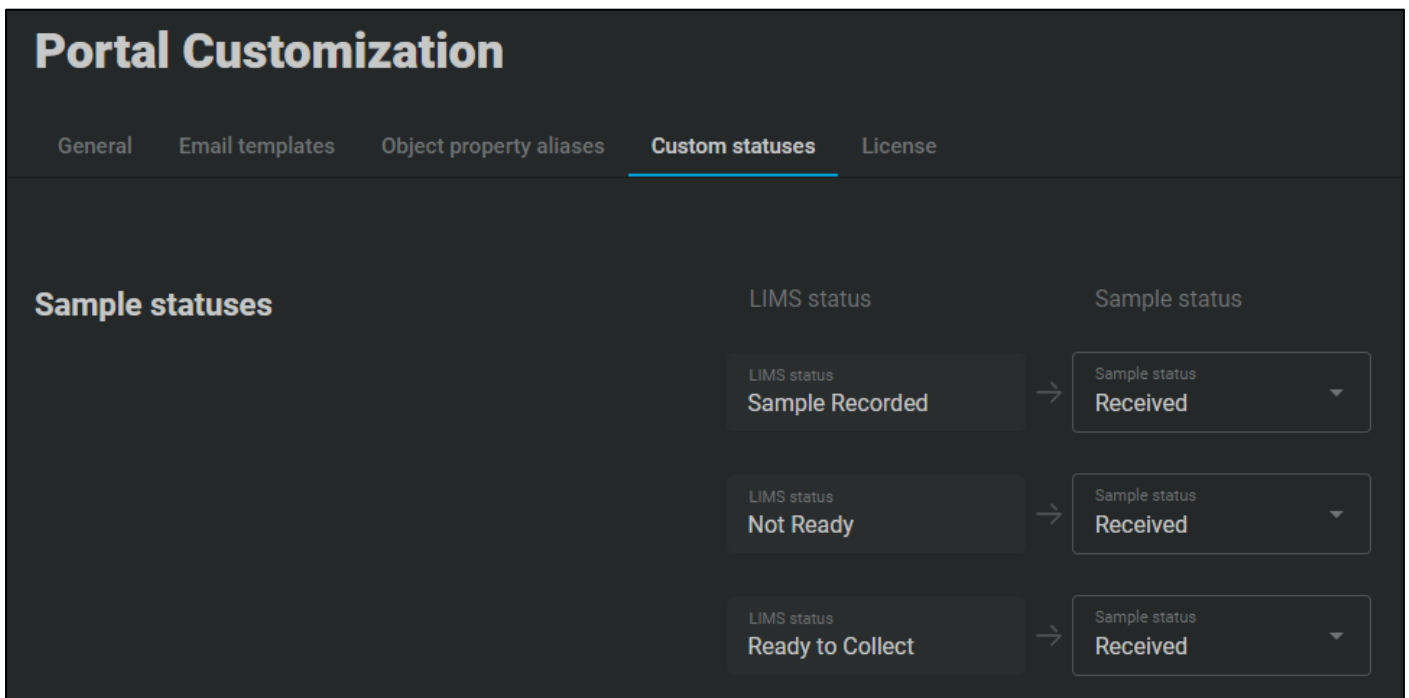
Laboratories can configure sample statuses using the Workflow Architect. Exchange Portal users do not need to see all internal laboratory statuses, so administrators can map every LIMS sample status to one of the following Exchange Portal statuses:

- Received
- In Progress

- Completed

Click the **Save** button to apply your changes.

The order status depends on the sample statuses:
- When a user saved an order as a draft, it has the "Draft" status.
- When an order is submitted by users, it receives the "Submitted" status and shows in LIMS, the laboratory can onboard it.
- If at least 1 sample in the order is in the status "Received", the order status becomes "In progress".
- If at least 1 sample in the order is in the status "In progress", the order status becomes "In progress".
- If all samples in the order are in the status "Completed", the order status is also "Completed".

When the order status is changed by users manually or by the described above rules, users will receive email and internal notifications about order status changes, only if it is configured on the Notifications tab.

Notifications tab

On this tab, administrators can configure globally the logic of notifications, laboratory users that should receive these notifications, and notifications timeframe.

In the table, you can select who should be notified about order updates by the following events:

- Order status became Draft
- Order status became In progress
- Order status became Submitted
- Order status became Completed
- Modifications of submitted orders (e.g., attachments changes, new results, order editing, etc.)

And also, which default state of the "Follow discussion" setting should be set for chosen users: receive notifications about new messages in discussions or not. The bell icon on the **Order Details – Discussions tab** serves for receiving notifications of new messages in the discussion of this order. When it is crossed out, users will not receive such notifications.
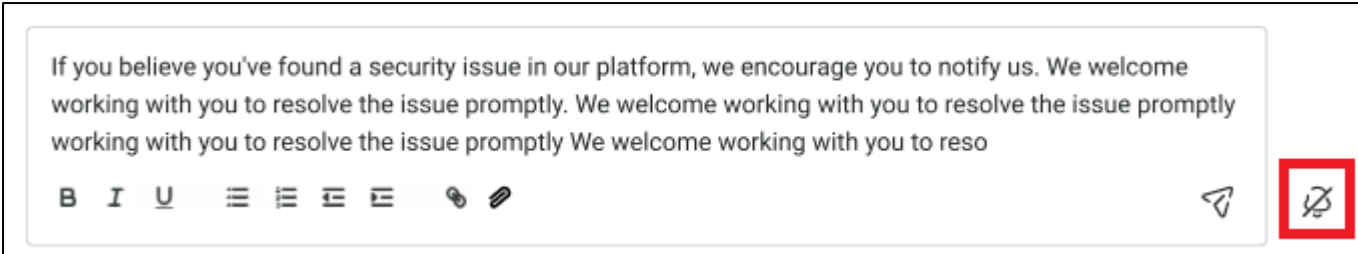
If it is not crossed out, notifications will be sent.

If checkboxes for the Discussion (default setting) row are checked, for all orders the selected users have access to, the bell icon will be turned on by default and these users will receive notifications about new messages in discussions. But they can turn this setting off on a per order basis.

There are 4 columns in the table:

- Notify order owner – If checked, order owners will receive emails and system notifications about their order updates (depending on the event).
- Notify org administrator – If checked, org administrators will receive emails and system notifications about order updates (depending on the event) on all orders created for organizations where they play this role.
- Notify org CC – If checked, the specified emails in the CC addresses of organizations will receive email notifications about order updates (depending on the event) if these orders are created for these organizations.
- Notify lab receivers – If checked, the specified below Laboratory receivers will get emails and system notifications about order updates (depending on the event) for all orders in the system.

Email notifications will be sent to user's email addresses. Internal notifications will be sent to users inside the portal and will be displayed in the **Notifications pop-up** (and on the **Admin Dashboard** for administrators).
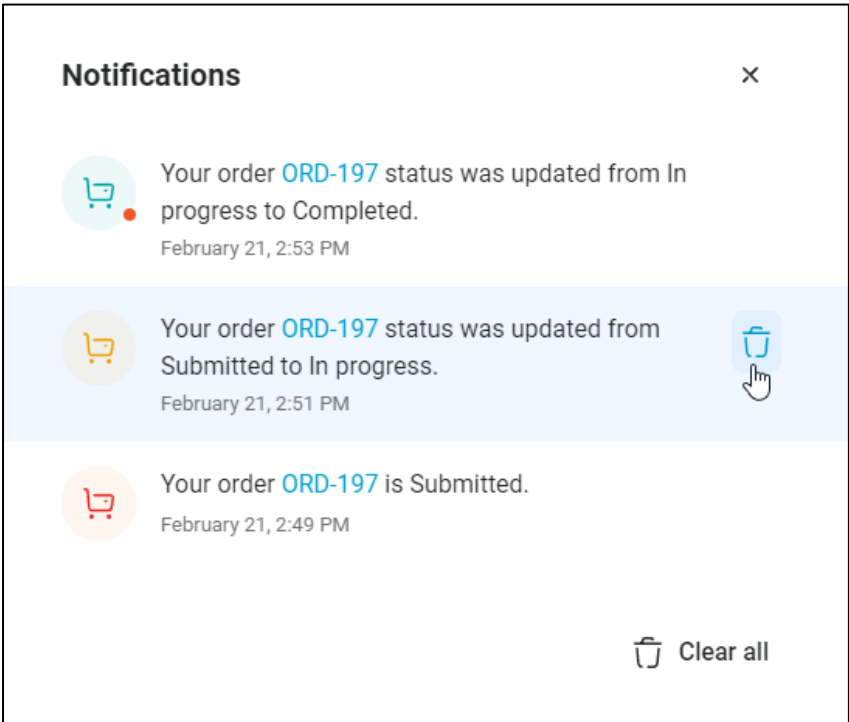
Organization CC addresses are not portal's users, so they cannot receive internal notifications, just emails. And also, they cannot open the **Order Details** screen and turn the bell icon off not to be notified about new messages in discussions. But administrators can turn off receiving of such emails by CC addresses on a per organization basis on the **Organization Details screen – Addresses tab**.
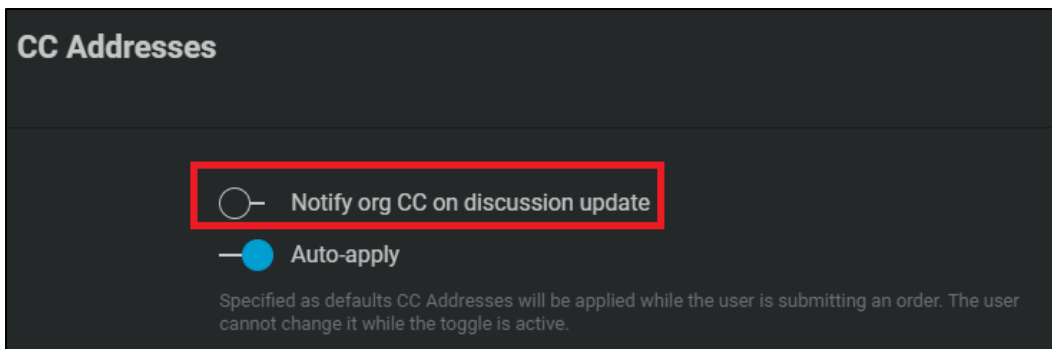
In addition, each user can set whether he/she wants to receive notifications about order changes on the **User Profile – Notifications tab**.
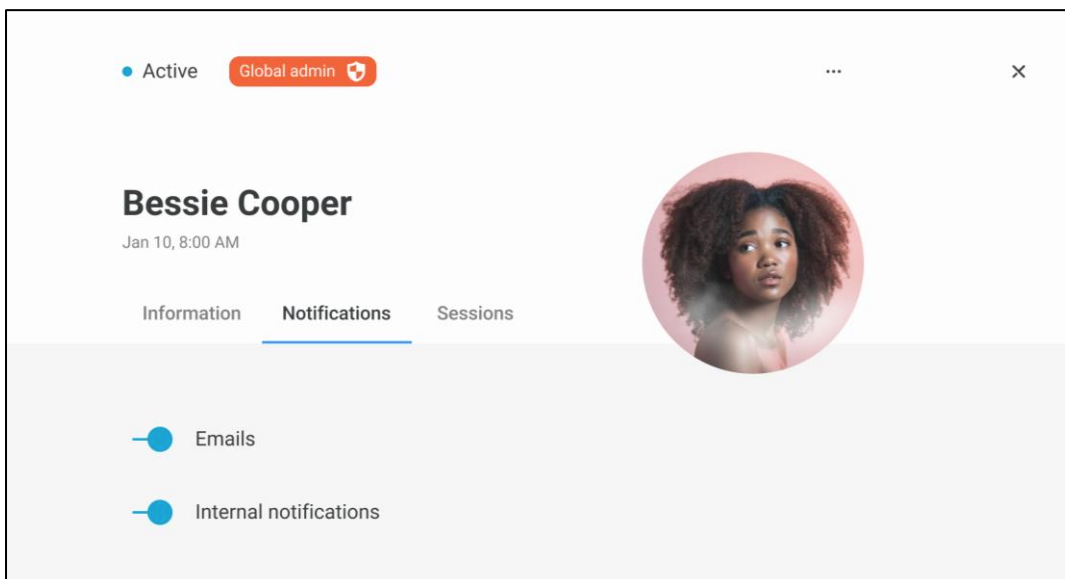
If the user switches off the **Emails** toggle, he/she will not receive email notifications.

If the user switches off the **Internal notifications** toggle, he/she will not receive internal notifications.

These settings will affect not all notifications, but only notifications about changes of user's orders:

- Orders creation
- Order status updates
- Modifications of submitted orders (e.g., attachments changes, new results, order editing, etc.)

All users will receive general notifications regardless of their personal settings on the **User Profile** (for example, invitations to organizations). Notifications about new messages in discussions depend on whether users follow the discussion or not.

The **Laboratory receivers** section allows you to select which lab users should receive notifications about order updates if it is configured in the table above. We recommend at least notifying the laboratory of new

submitted orders. In this section you can see a list of all lab users and select who is responsible for receiving notifications.
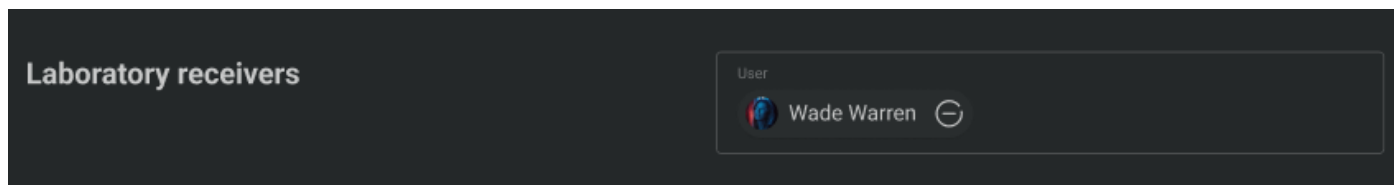
In the **Notifications configuration** section, you can limit the timeframe in hours and minutes for notifications that will be displayed for users in the **Notifications pop-up**.
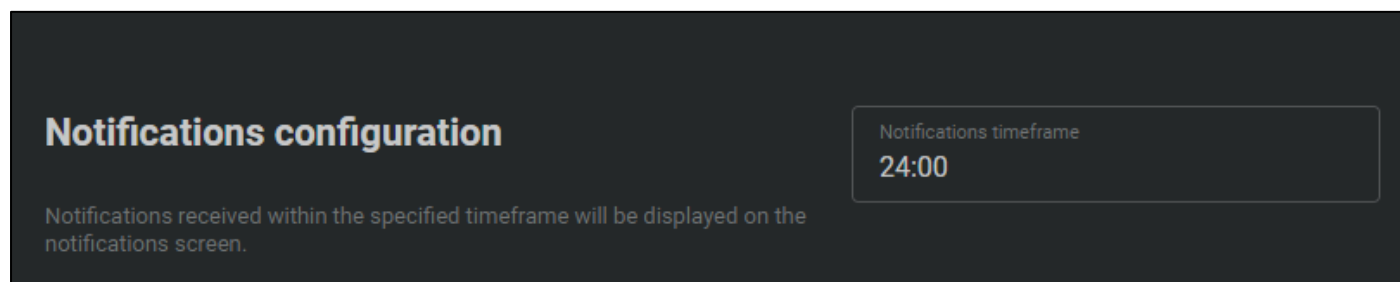
The **Notifications pop-up** can be open by clicking the bell icon in the header.

For example, if this parameter is configured as 24:00, users will see notifications received during the last 24 hours on the **Notifications pop-up**.
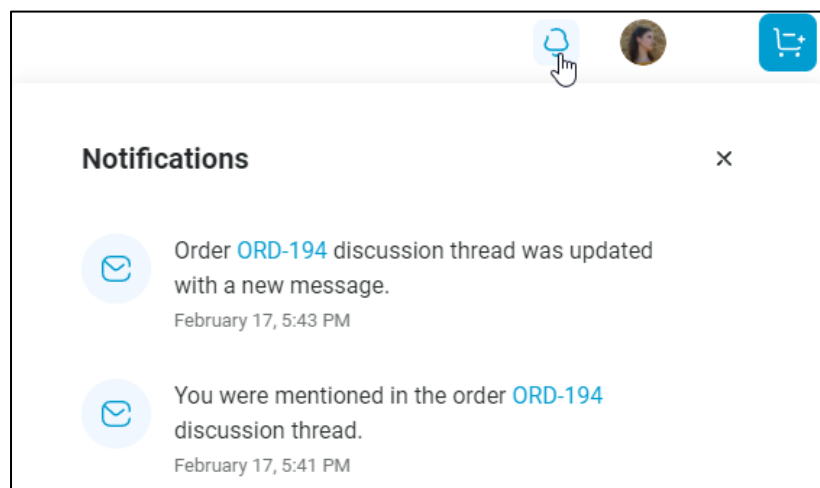
This setting does not affect administrator's notifications displayed on the **Administrative Dashboard**. The history of all notifications is available here.

Click the **Save** button to apply your changes.

License

For the application to be available for users to work, you need to obtain a license from the LABWORKS.

If the valid license is not applied, global administrator will be redirected to the **License** tab of the **Portal Customization** screen right after logging in. Other screens are unavailable.

If the license is uploaded and valid, but it should be changed, click the "gear" **Customization** button at the bottom of the Left menu to open the **Portal Customization** screen.
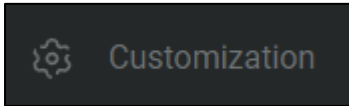
Open the **License** tab of the **Portal Customization** screen.
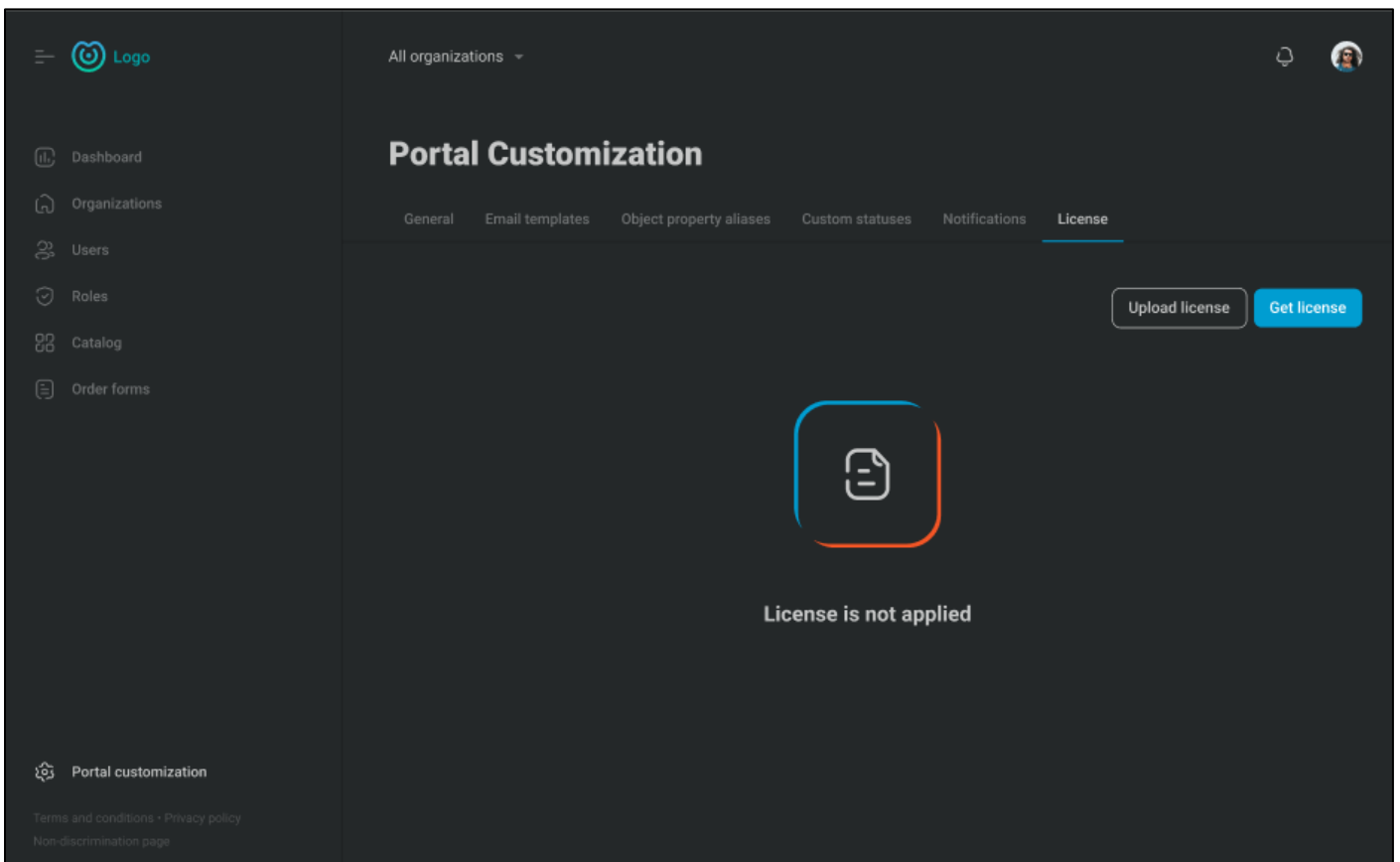
Click on the **Get license** button and a file with information about the server will be downloaded.
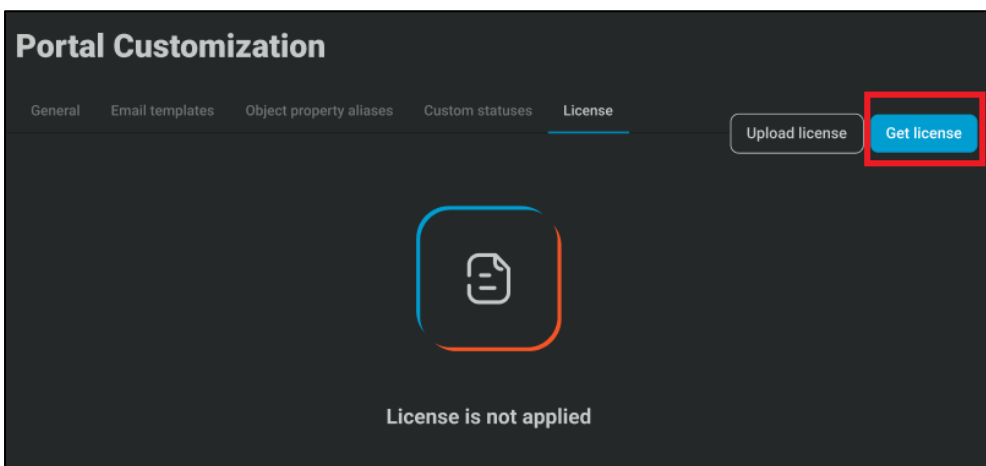
You should send this file to support@labworks.com and order a license.

When the LABWORKS sends you the license file, go back to the **License** tab, click the **Upload license** button, and select this file on your computer. The license should be applied within 7 days of its creation.
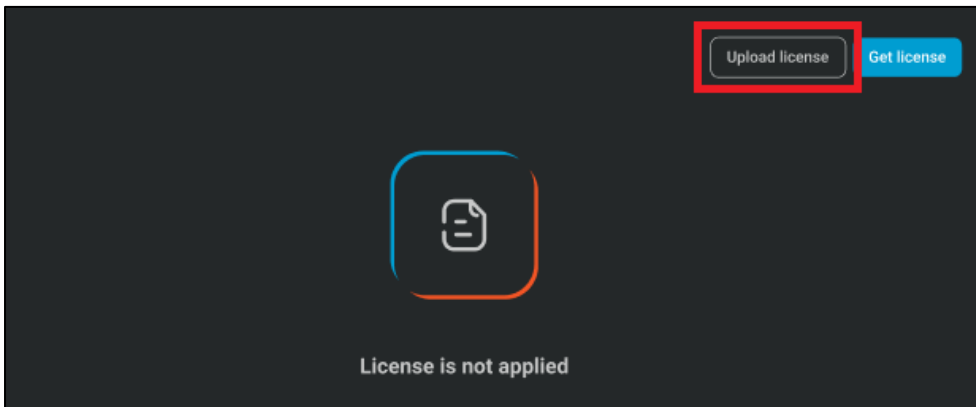
Once the license is uploaded, you can see its details.
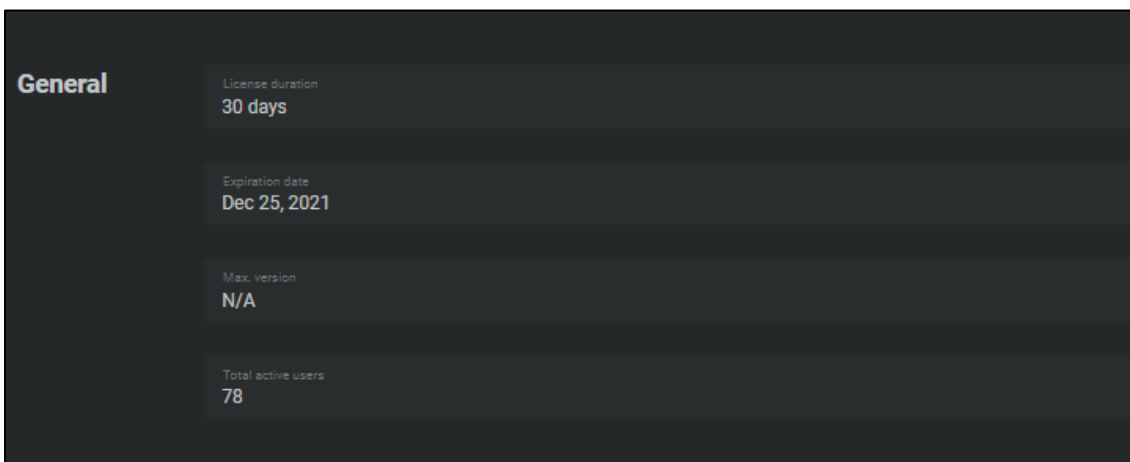
Please pay attention to the possible restrictions indicated in the license:

- License duration and expiration date
    - Do not forget to get a new license before the current one is expired.
- Max version
    - If your application version has reached the Max version of the license, users cannot work with the Exchange Portal.
- Total number of active users
    - When this limit is reached, new users cannot be added to the system with the "Active" status.
    - It does not affect synchronized LIMS lab users.

User Management

Users are user accounts that can access the portal and use its functionality.

On the User Management area of the Administrative part of the portal, admins can manage users: view users in the list, filter them according to their needs, see user details and edit them. To work with users, you should have the *View user list* permission in at least 1 your organization.

Users List

The **Users List** screen can be open by clicking the **Users** button in the Left menu or on the Dashboard.
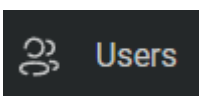
On this page, a list of all portal users is displayed as a table with the following columns:

- Full name
- Email
- Role
- Status

The list of displayed users depends on your role permissions: you can see all users associated with the organizations in which you have the *View user list* permission.

LIMS laboratory users are automatically synchronized to the system from the LABWORKS Enterprise LIMS and they are displayed in the list along with Exchange Portal users as laboratory users.

Users who have not verified their emails are not displayed.

Some users are marked with special icons according to their roles:

- - Global Administrators

- - Org administrators (if the user has the org administrator role in at least 1 organization)

- - Laboratory users (including LIMS lab users)

If the user has more than 1 role, you will see the + N icon in the Role column.
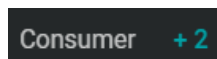
Hover the mouse over to open the list of all user organizations and roles in them.
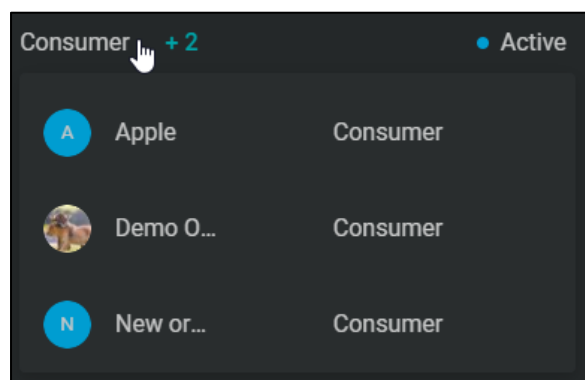
Users can have 3 statuses:

- **Active** – Active users can work with the portal.
- **Pending** – If self-registration is allowed, but auto-approve is turned off, registered users will receive the Pending status and administrators should activate or deactivate them. Until such users are activated, they cannot sign into the portal and work with it.
- **Inactive** – Inactive users are not able to sign into the portal, they do not receive notifications.

Use sorting and contextual filters to sort or find users according to your needs.
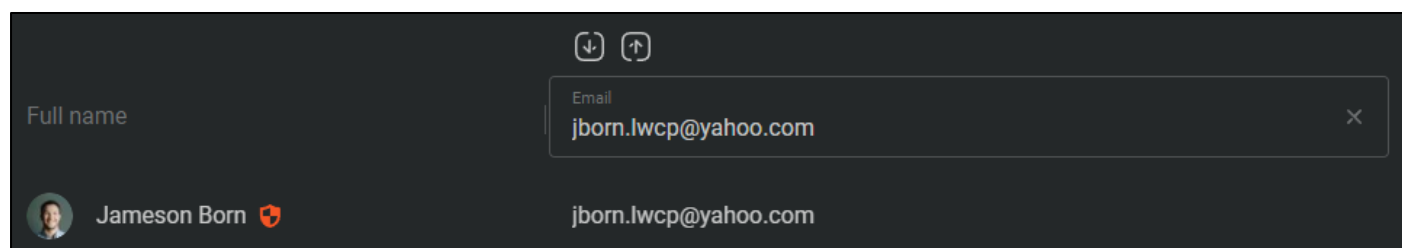
Also, you can use global filters by the Type or by the Status to find users quickly. Only global administrators can filter users by their types.
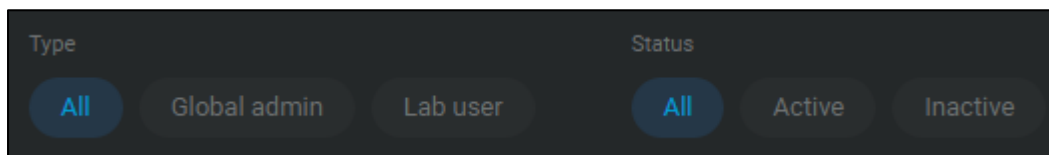
And users can be filtered by the organization as all items on other portal screens.
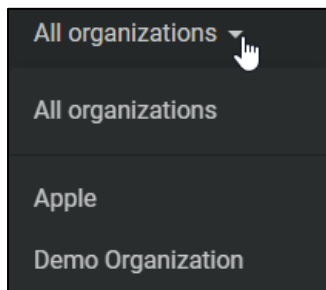
Invite User

Administrators that have the *Invite user* permission can click the **Invite user** button on the Users List screen and open the **Invite User** dialog.
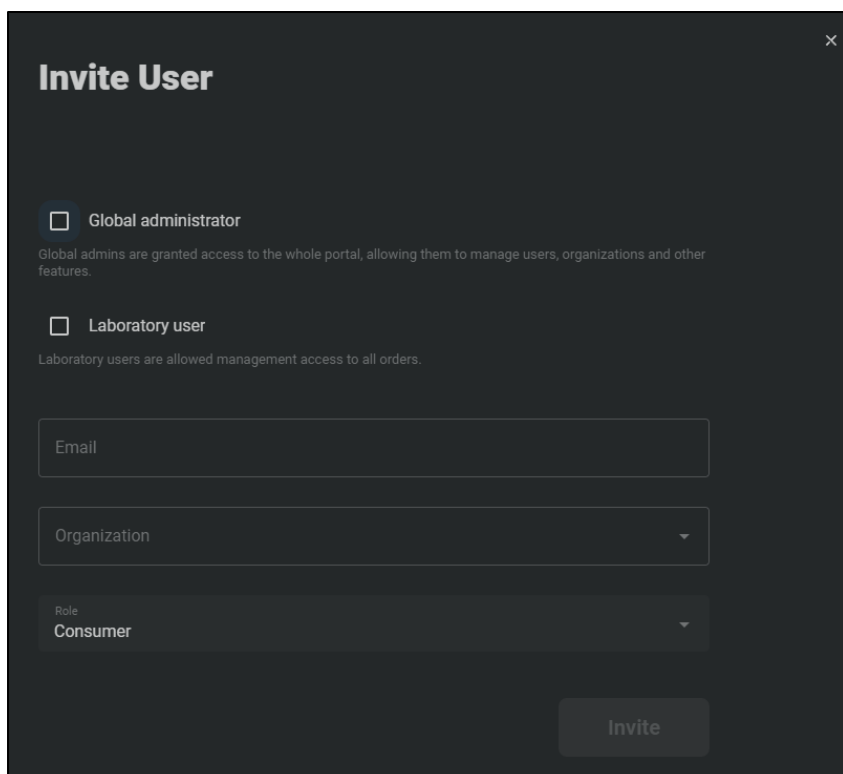
Invited users can be Global administrators or Laboratory users, in that case, it is not needed to specify the organization for them, because global admins and laboratory users work with all organizations.

For other users, you need to select one of active organizations and specify one of active user roles available for this organization. Please note, that you can see only organizations of which you are a member and in which you have a role with permission to *Invite users*. To set the user role, you need to have the *Set user role* permission in the selected organization, otherwise the invited user will have the Consumer role.

The Org administrator role can be given to other users only by global administrators or org administrators.

And for all users the email address should be entered.

When all fields are filled, click the **Invite** button. An invitation email will be sent to the specified email address. Invited user should click the link in the email, and he/she will be navigated to the **Sign Up** screen. Once all needed information is entered and the **Sign up** button is clicked, the user is considered as a new Active user, a member of the selected organization with the specified user role. First, this user needs to verify his/her email. And after that the user can log into the portal and use the application.

User Details

Administrators can click on any user record in the **Users List** to open the **User Details** dialog.
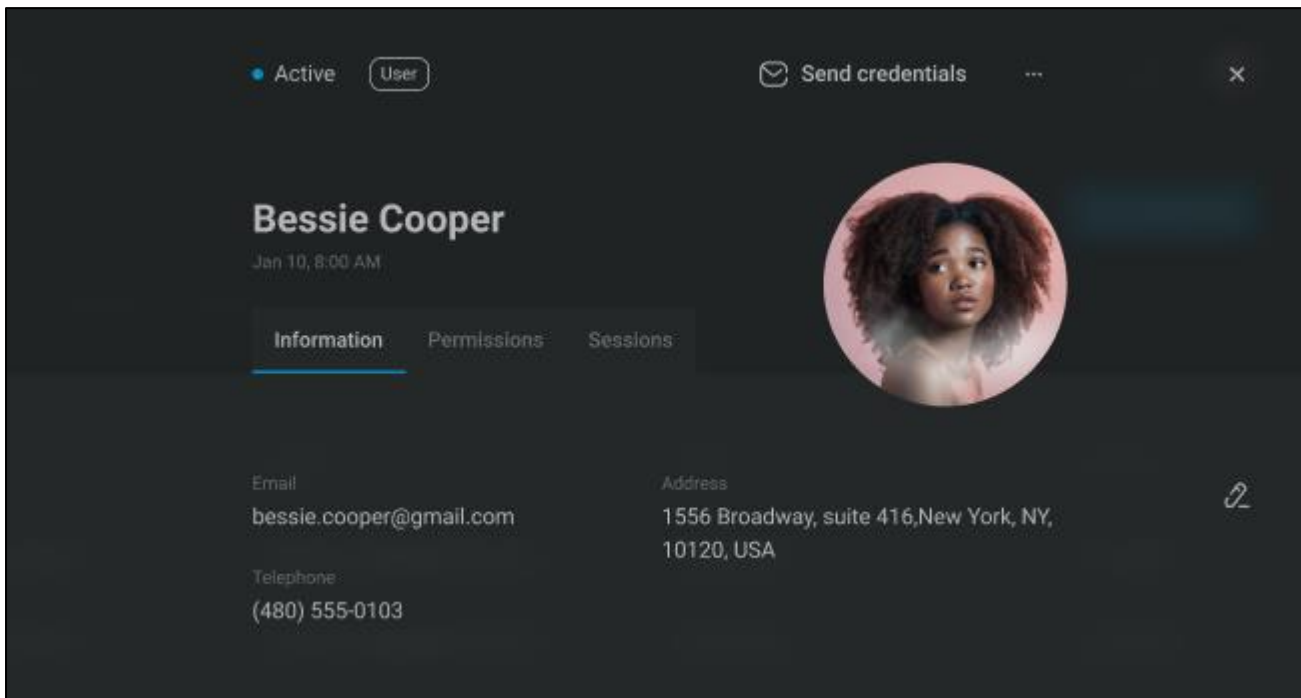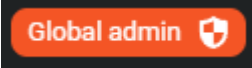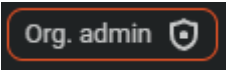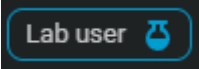
The User Details screen can be open by the following ways:

- Click the user row on the Users List screen.
- Click the user row on the Organization Details – Users tab.

To open the User Details, the administrator should have the *View user details* permission inside at least 1 associated with this user organization.

At the header of the screen, you can see the user's name, status and the user type:

- Global admin if the user has the Global admin role in the system.

- Org admin if the user has the Org administrator role in at least 1 organization.

- Lab user for Exchange Portal laboratory users

- LIMS lab users for synchronized from LIMS users.

- User for all other users with custom roles or the Consumer role.

If the user whose details are open needs to reset the password, click the **Send credentials** button and the email with the password restoration link will be sent to this user.
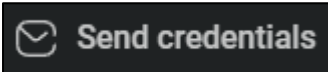
The user can click this link, open the **New Password** dialog, enter a new password, save it, and then use this new password to sign into the portal.

To activate or deactivate the user, click the "…" icon and open the menu. You need to have the *Change user record* permission in all the organizations of this user.
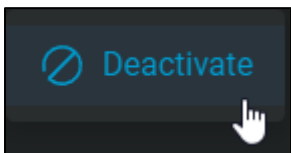
Inactive users will not be able to log into the portal and work with it.

On this dialog, the user information is displayed divided into 3 tabs.

Information tab

On the **Information tab**, you can see the user data: Email, Phone number, Address. To edit it, click the

pencil icon . The administrator should have the *Edit user details* permission in at least 1 organization

associated with this user to make these changes.

In the edit mode, you can change the user First name, Last name, Email, Phone number, and Address. Click the **Save** button to apply changes, or the **Cancel** button to return to the view mode without any changes.

Permissions tab

On the **Permissions tab**, all the data about user organizations and roles are displayed. Please note that you cannot change permissions, if the **User Details** of your account are open.
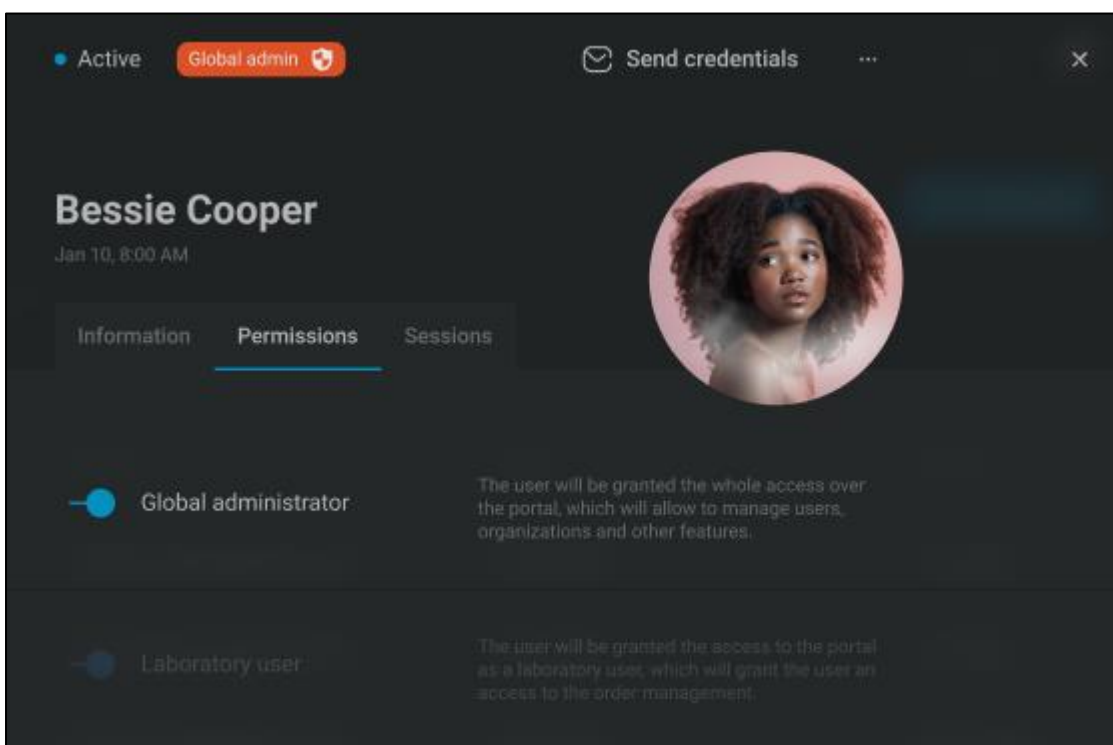
If the user is Global administrator, the **Global administrator** switcher is turned on. In that case, the user is not related to particular organizations, he/she is granted the access over the whole portal, which will allow to manage users, organizations and other features. If you need to change the user permissions, you can turn this toggle on. Only global administrators can give the Global admin role to other users.
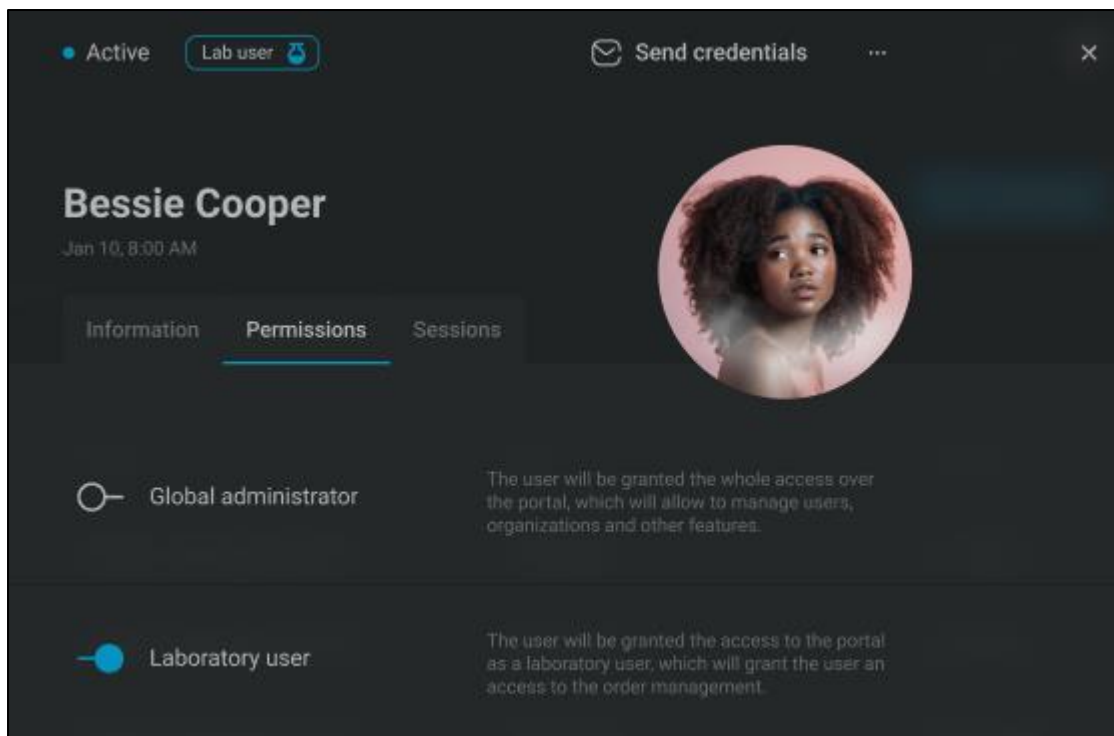
If the user is a Laboratory user, the **Laboratory user** switcher is turned on. In that case, the user is not related to particular organizations either, he/she is granted the access to the portal as a laboratory user, so they can work only with orders. If you need to change the user permissions, you can turn this toggle on. Only global administrators can give the Laboratory user role to other users.

LIMS lab users' permissions cannot be changed. They only can receive/lose the Global admin role in addition to the Lab user role.

If the user is not Global administrator or Laboratory user, the list of all organizations in which the user is a member is displayed. Or the user can have the access to all organizations with one role. This role should be a global role, which means the role related to all organizations in the system. See more details about roles in the corresponding section of this document.

Only global administrators can give users access to all organizations (except lab users, LIMS lab users and other global admins, since they already can work with all the organizations). If you want to grant access for the user to specific organization, switch the **All organizations** button off and assign organizations manually.

If the user is a member not of all organizations, you can see the list of them and user roles on the Permissions tab: the list of all organizations in which this user is a member and in which you have the *View user details* permission.

To open the details of the organization (if you have the *View organization details* permission in this organization), click on its name. The **Organization Details** dialog will be open. See more information in the Organization Details section of this document.
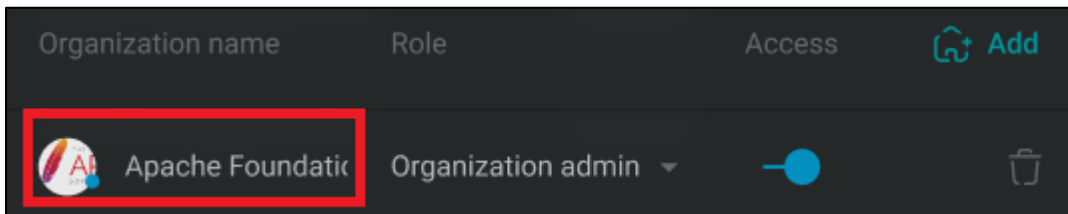
To change the role, select the needed option in the **Role** drop-down. To do that, you need to have the *Set user role* permission in this organization. Only global administrators and org administrators can give the Org admin role to other users.
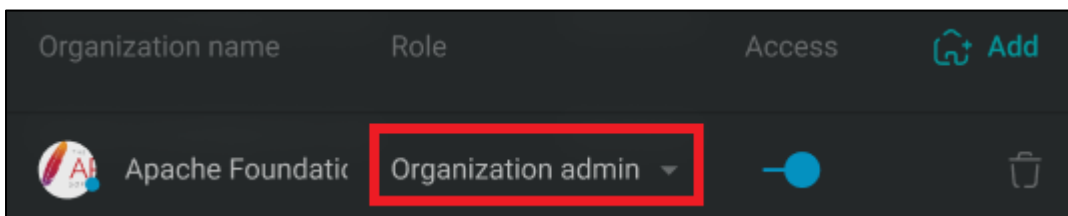
So that the user can no longer work with a specific organization, turn off the **Access** switcher. To perform this operation, you need to have the *Change user access status* permission in this organization.
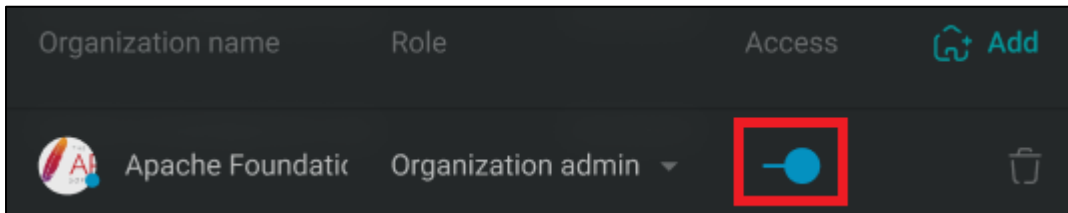
To remove the user from members of an organization, click on the **trash** icon. The *Change user access status* permission in this organization is also needed to perform this action.
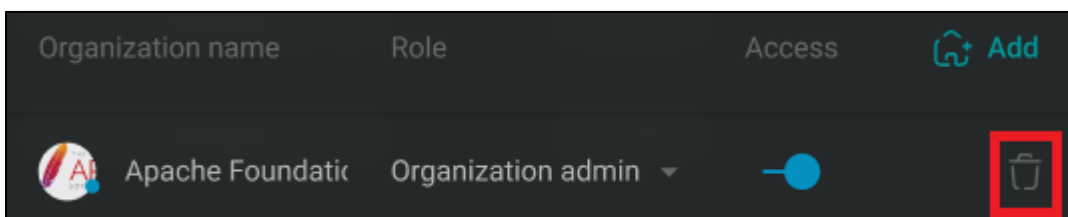
To add the user to a new organization as a member, click on the **Add** button. You can do it if the user is active and you have the *Invite user* permission in the organization you want to add the user to.
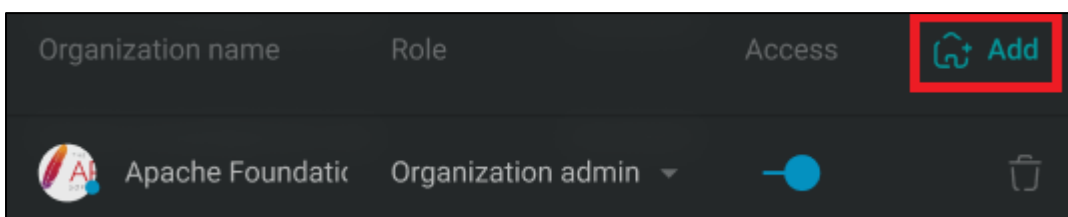
The **Add Organization** dialog will be open.
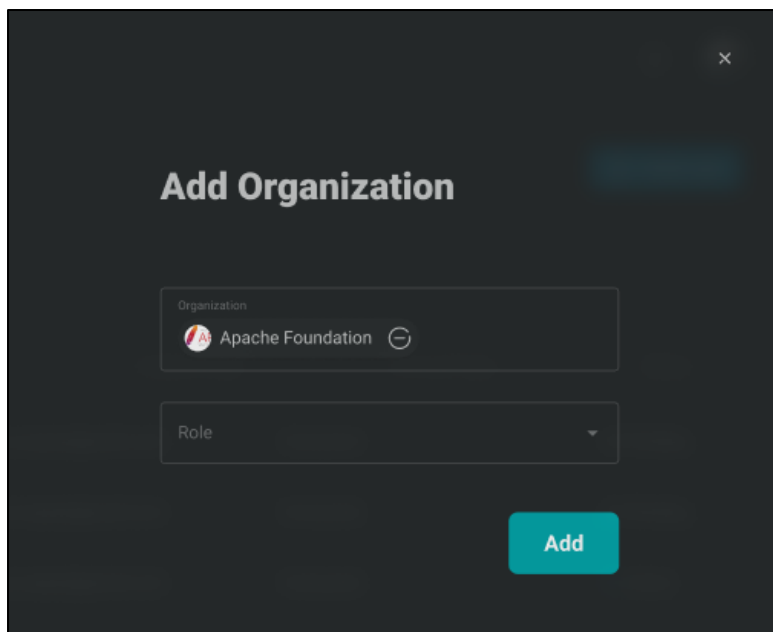
On this dialog, you can select one or several organizations in which this user is not a member and you have the *Invite user* permission. If you have the *Set user role* permission in the selected organizations, you can choose one of active roles associated with them. Otherwise, the user will be invited with the Consumer role. Only global administrators and org administrators can give the Org admin role to other users.

Click the **Add** button to invite the user. He/she will become a member of the selected organizations with the specified role.

Sessions tab
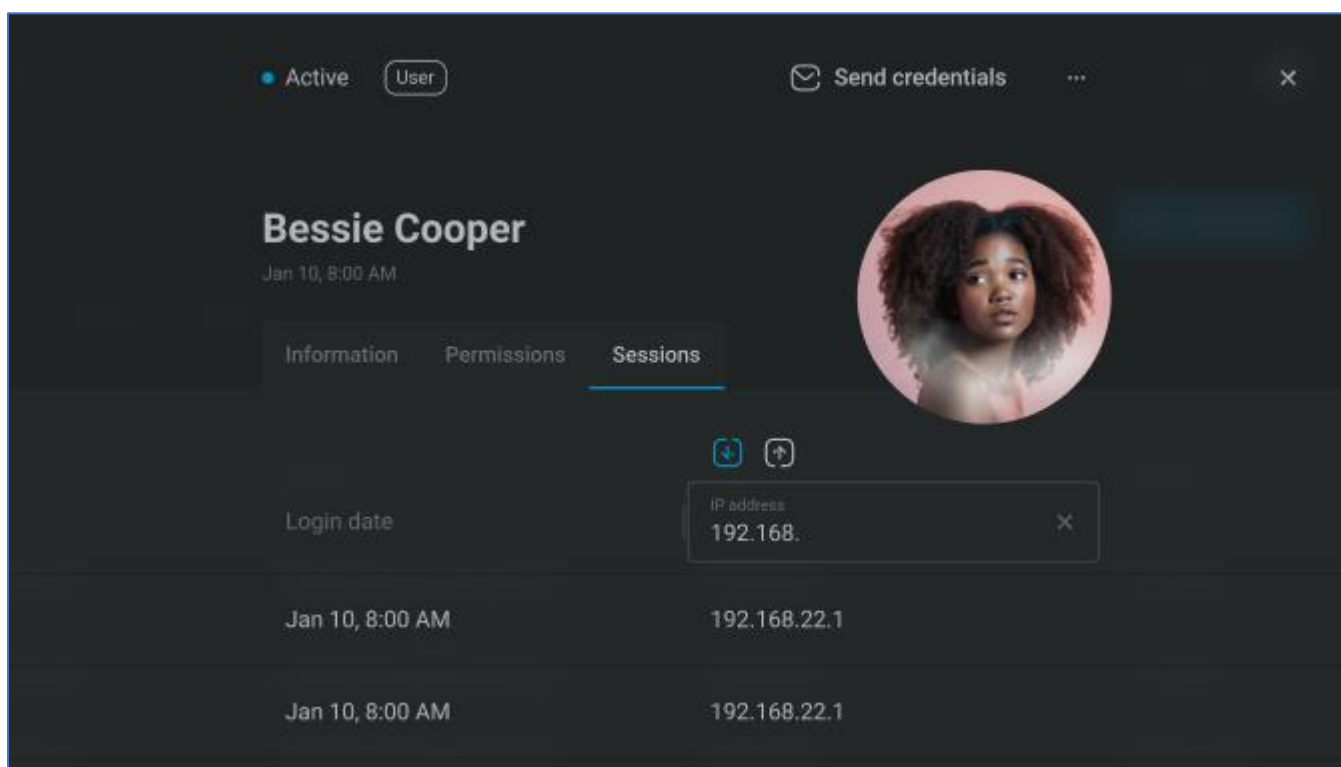
On the Sessions tab of the **User Details** dialog, the list of all user sessions is displayed. You can see the login date-time and the IP address. Use filtering to find needed records. To open this tab, you should have the *View user sessions* permission in at least 1 organization associated with this user.

Organization Management
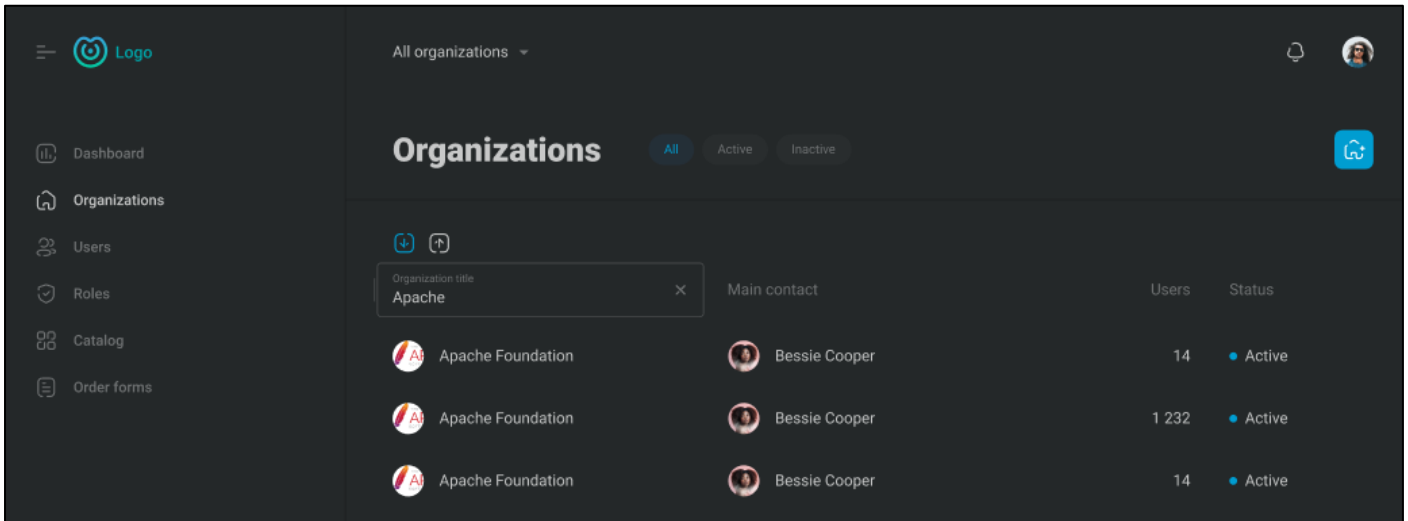
Organizations are the various companies or offices that are part of your system, departments, institutions, etc. Each organization includes a number of users - its members. Organizations can have a number of roles that users can play in them. When consumers create a new order, they must select which organization this order is for, as well as one of the order forms available to this organization, which will be used as the basis for this order.

The Organization Management area is intended to manage organizations. Administrator should have the *View organization details* permission in at least 1 associated with him/her organization to work with organizations.

Click the **Organization** button in the Left menu or the Dashboard to open the **Organizations List** screen.
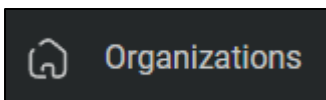
Organizations List
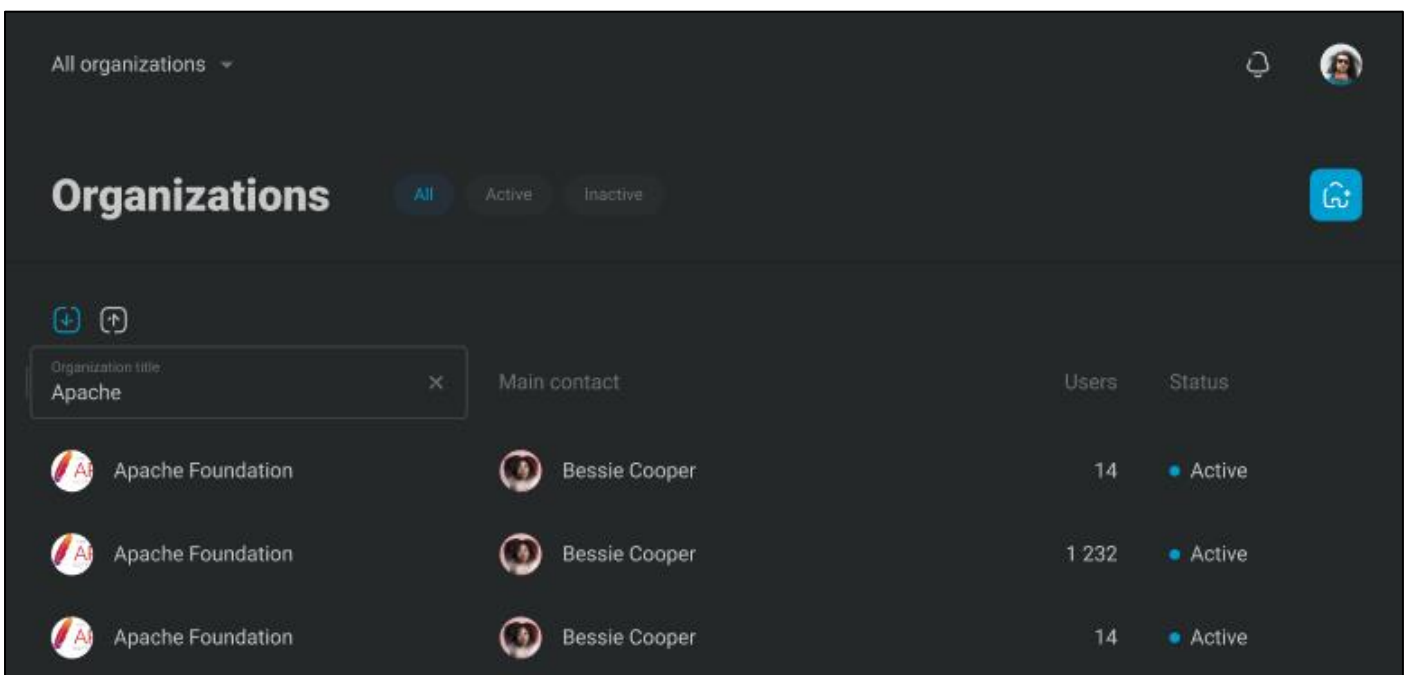
This screen displays the list of organizations in the portal with their names, main contacts, number of members, and the status.

The organizations list depends on permissions of the current administrator: you will see only organizations where you are a member and where you have a role with the *View organization details* permission. Global administrators can see and manage all organizations.

Use quick filters at the top of the screen to filters organizations by statuses.
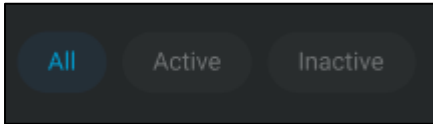
To find needed items, apply sorting or contextual filters in the table.
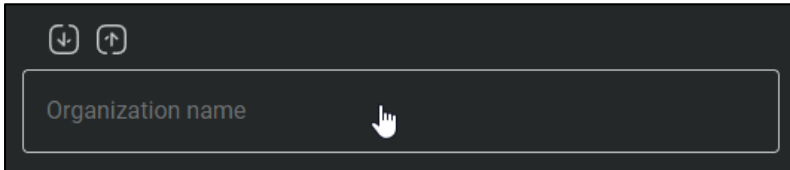
Also, organizations can be filtered by the organization global filter as all items on other portal screens.
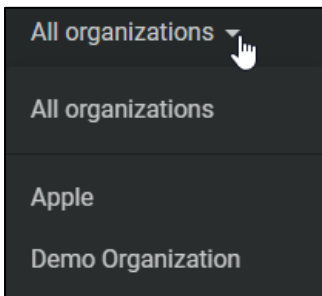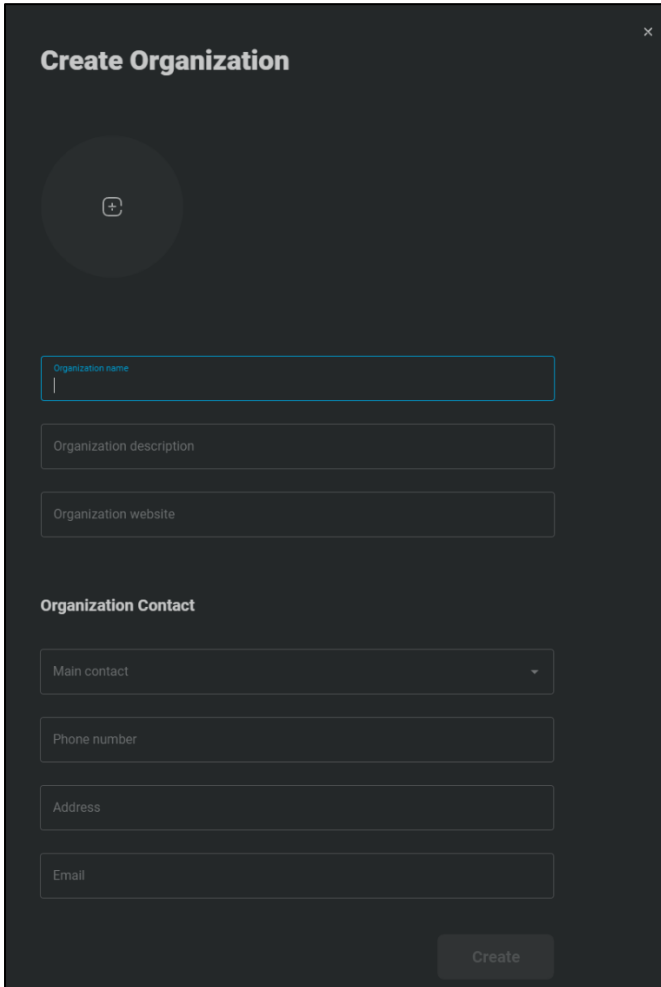
To open details of any organization, click on its row. The **Organization Details** dialog will be open.

Only global administrators can create new organizations. Click on the **Create organization** button in the top right corner to add a new organization. The Create Organization dialog will be open.

Create Organization

Specify the Organization name, description and the website if needed.

Upload the logo of the organization. Click the **plus** icon and select one of pictures on your computer or device.

The **Crop Image** dialog will be open.

Select the needed area and click the **Submit** button.

You can change the logo if needed, just hover the mouse over the picture, click the **trash** icon to remove it or the **upload** icon to select another picture.
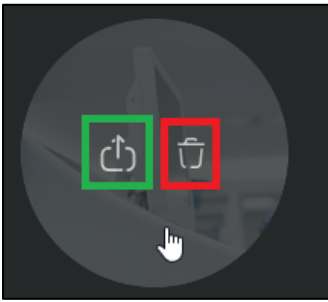
Optionally, you can specify the main contact: the main contact's name, phone number, address, and email.

You can select one of existing in the system active users (except global administrators and laboratory users) or invite a new user to the portal. In that case, input the email of this user and the invitation email will be sent to the address at the moment of the organization creation. This user should click the invitation link in this email, register in the portal, and log in via the **Sign In** screen.

The user that was selected as the organization main contact will receive the org administrator role in this organization.

Click the **Create** button to add a new organization.

Organization Details

The Organization Details screen can be open by the following ways:

- Click on a row on the Organizations List screen.
- Click on an organization on the User Details – Organizations tab.
- Click on an organization on the Role Details – Organizations tab.
- Click on an organization on the Order Form Details – Organizations tab.

You can see and edit the organization details on this dialog, activate or deactivate it.
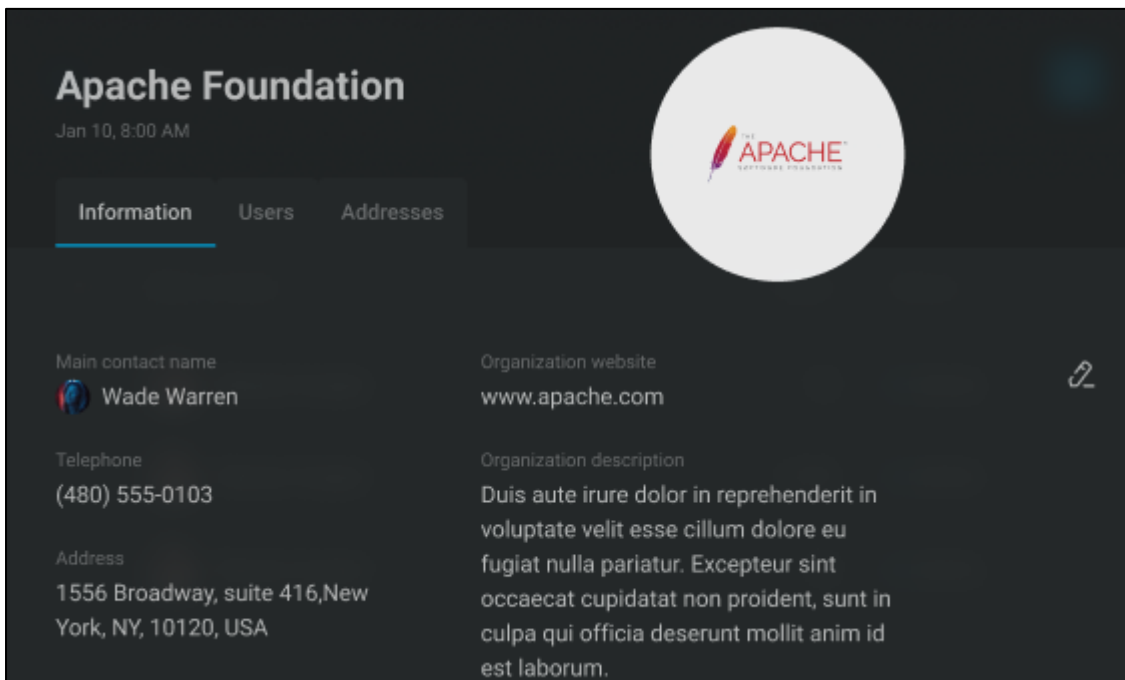
Click on the "…" ⬚ icon to open the menu and select the needed option – Activate or Deactivate. These operations are available only to administrators with the *Change organization status* permission in this organization.
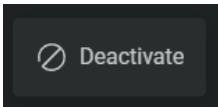
Inactive organizations will not be available for adding new users and orders to them.

On the **Organization Details** dialog, the organization information is displayed divided into 3 tabs.

Information tab

On this tab, all the general data about the organization is displayed.

To edit the organization information, you should have the *Edit organization details* permission in this organization.

Click the **pencil** icon at the right-top corner of the screen. The dialog will be open in the edit mode.
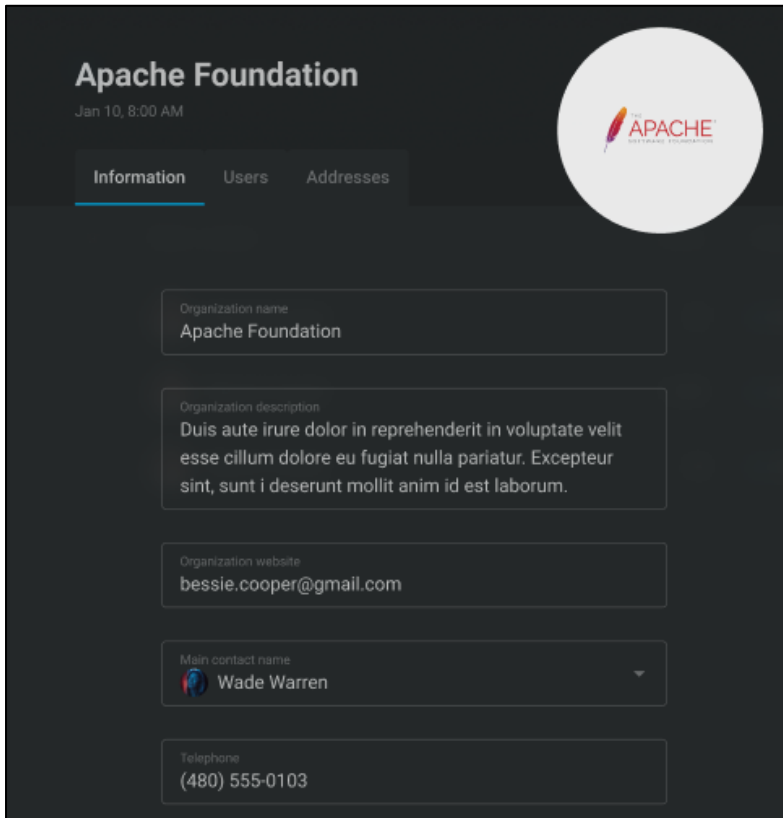
You can remove or edit the logo, change the organization name, description, website, main contact's user, phone number, address, and the email. Click the **trash** icon to remove the logo or the **upload** icon to select another picture.
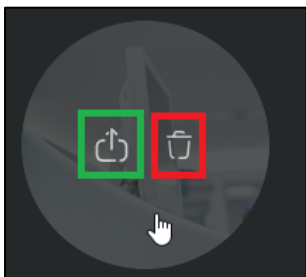
As the main contact, you can choose one of active members of this organization (except global administrators and lab users as they are not members of particular organizations and can work with all of them) with the enabled access to this organization. This user will not receive the org administrator role in this organization, the current role will be kept. So, if you want to make this user an org administrator, open the Users tab of the **Organization Details** dialog and change the role.

In the edit mode, the Domains list section is available for editing.
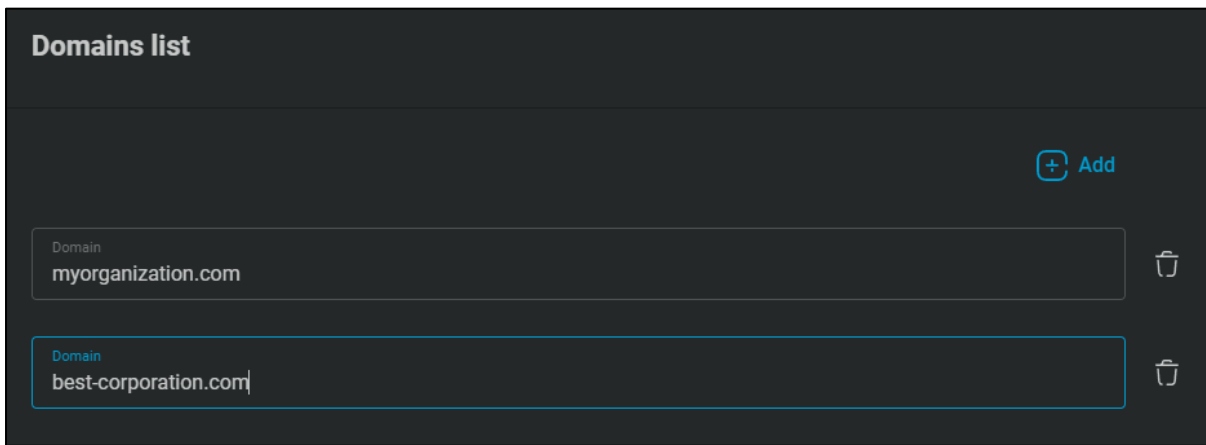
When new users register in the portal, the domain part of their emails will be mapped with all domains specified for existing organizations. If the domain in the user's email address matches the one specified in your organization, the user will be automatically added to it. For example, if you have the "xyz-company.com" as one of your domains, users with email addresses like name@xyz-company.com will become members of your organization upon registration.

Click the **Add** button to add one more domain.
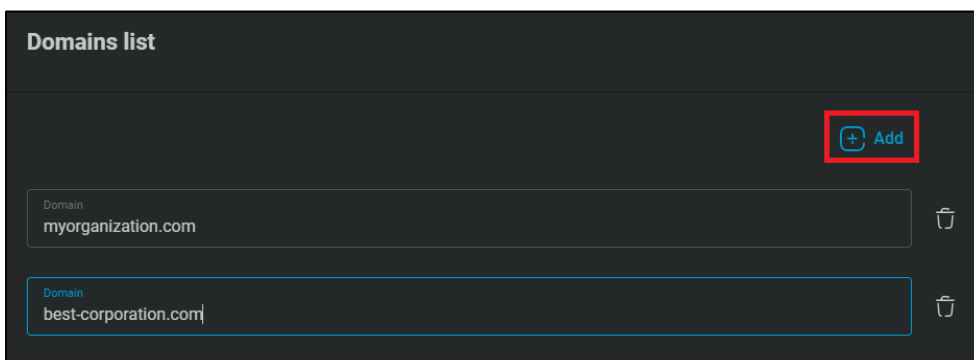
Click the **trash** icon to remove the item.
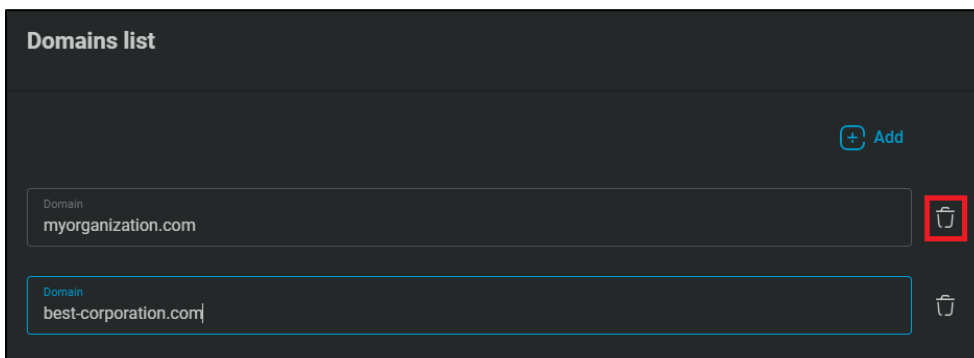
When all information is edited, click the **Save** button to apply your changes or the **Cancel** button to reset them.

Users tab

On the **Users tab** you can see the list of users belonging to this organization and their roles in it.

All members of the organization are displayed here (except lab users and global admins as they are not members of particular organizations, they work with all of them), if their email addresses have been verified.

Active users are marked with the blue circle.
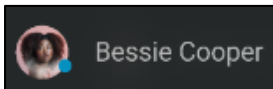
Inactive users are marked with the red circle.
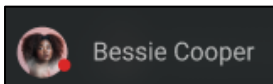
Click on a row to open the **User Details** dialog if you have the *View user details* permission in this organization.

If you have the *Set user roles* permission in the organization you can change a user role.
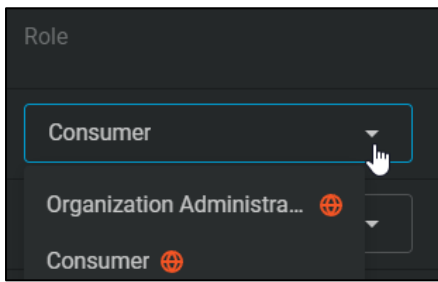
Roles of users with access to all organizations cannot be changed.

Global administrators or organization administrators can pick the Organization administrator role.

If you have the *Change user access status* permission, you can turn on or turn off the access to the organization for its members.
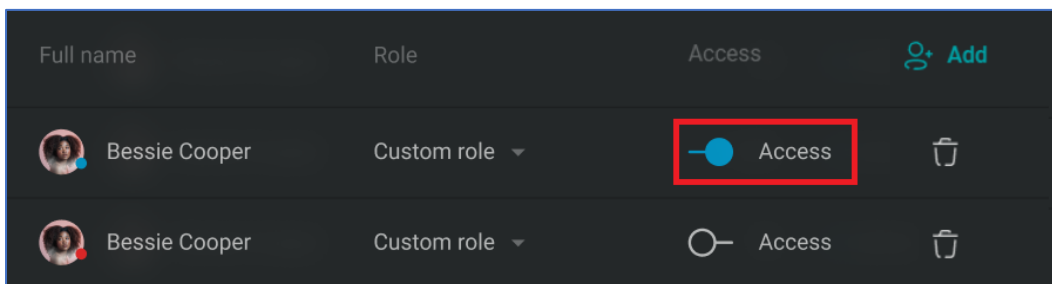
If the access is disabled, the user will not be able to see this organization on any portal screen, create orders, assign an order form, or add other users to this organization. So, it is considered as the user is not a member of this organization. All permissions of the role in this organization will not work. If the user is a member of only one organization and the access toggle in it is disabled, this user even cannot log into the portal.

Click on the **Remove** icon to completely delete a user from the organization. Administrators should have the *Change user access status* permission in this organization to remove users. Users with access to all organizations cannot be removed.
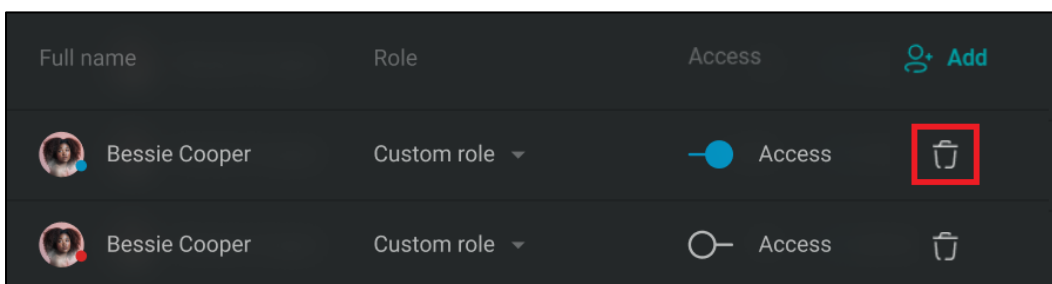
After removing the organization from the list, the user will lose the access to it.

To invite a new user to the organization, click on the **Add** button. Inviting users is available only for administrators with the *Invite users* permission in this organization. Users cannot be invited to inactive organizations.

The **Add User** to organization dialog will be open.

Start typing to search for users that you want to add to the organization.

You can invite one of existing active users that are not members of this organization, but are members of organizations where you have the *View user list* permission. Global administrators and laboratory users cannot be invited as they are not members of specific organizations, but can work with all of them.

Also, you can invite a new user to the portal, just enter the user email and press Enter. In that case, the invitation email will be sent to the address. This user should click the invitation link in this email, register in the portal, and log in via the **Sign In** screen.

Select a role for the user (available for administrators with the *Set user roles* permission in this organization). You can pick one of global roles or custom active roles associated with this organization if the role access to the organization is enabled. If you do not have the *Set user roles* permission, all added users will receive the Consumer role in the organization.

Global administrators or organization administrators can pick the Organization administrator role.

Click the **Add** button to add selected users to the organization.

Addresses tab

Organization report, invoice, and CC addresses are displayed on the **Addresses tab**.
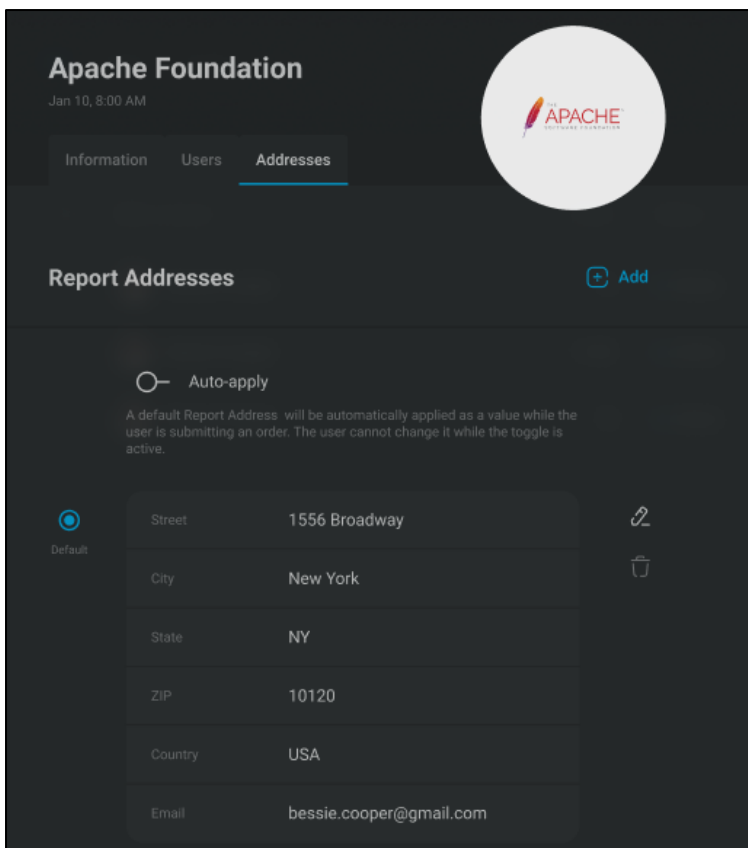
If you have the *Edit organization details* permission in this organization, you can manage organization addresses. Otherwise, you can just view them.
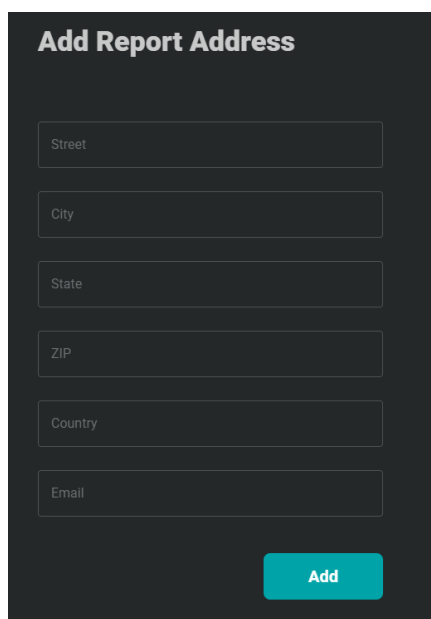
Report Address section

Contains the list of report addresses of the organization.

Click the **Add** button to add a new report address.
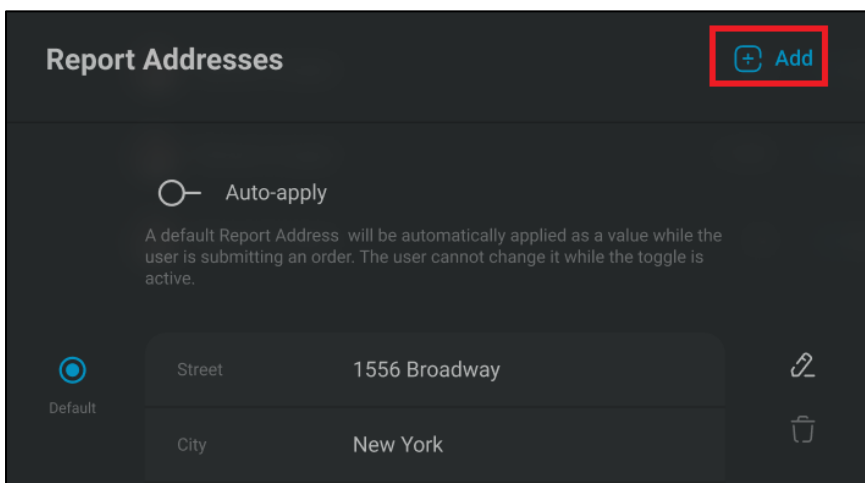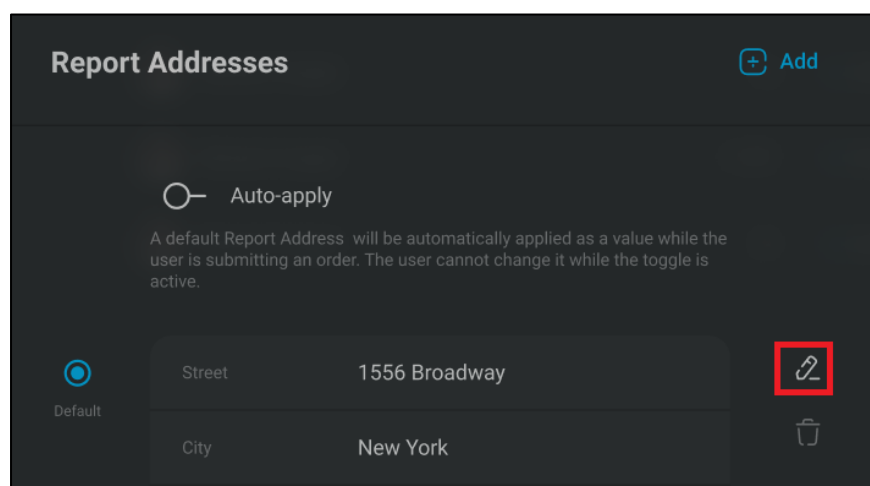
The **Add Report Address** dialog will be open.

Specify the street, city, state, ZIP code, country and/or the email address and click the **Add** button.
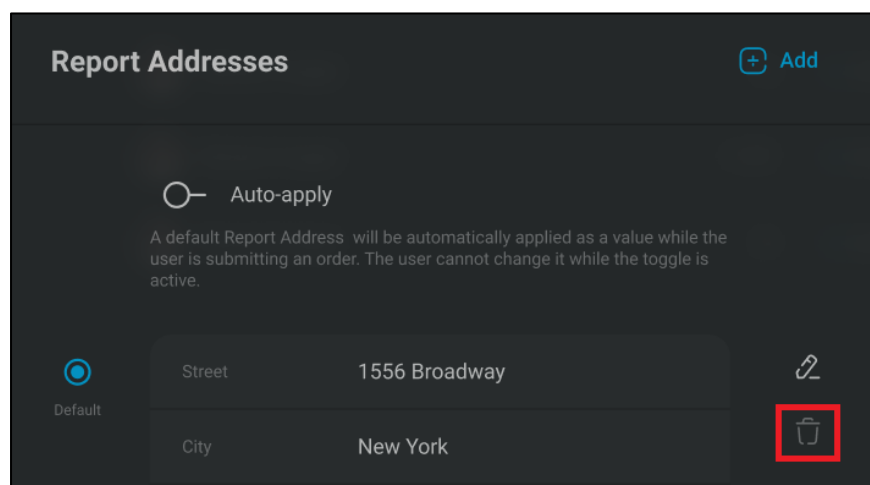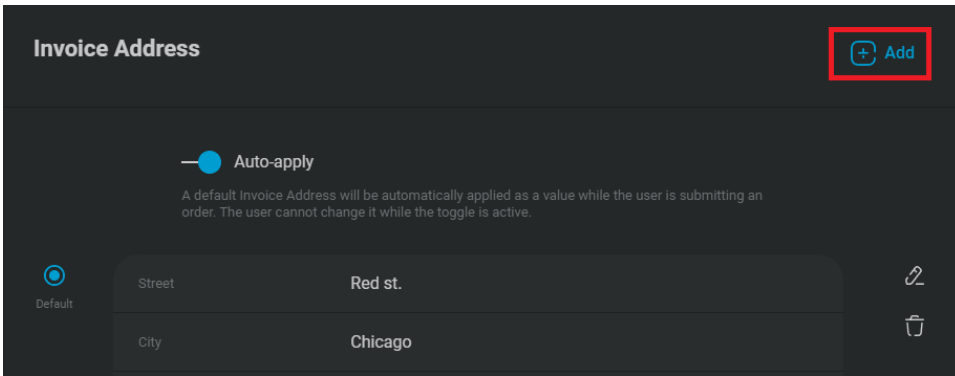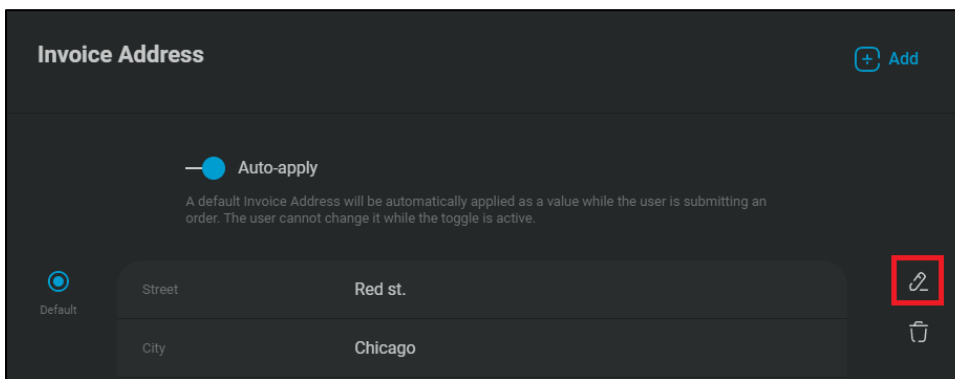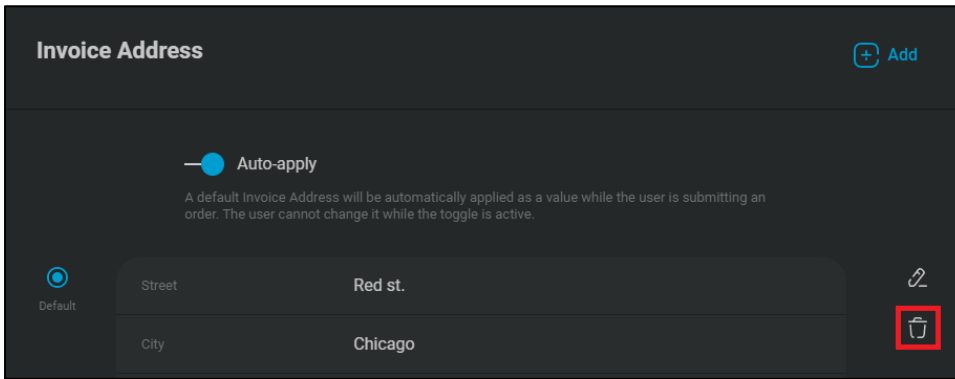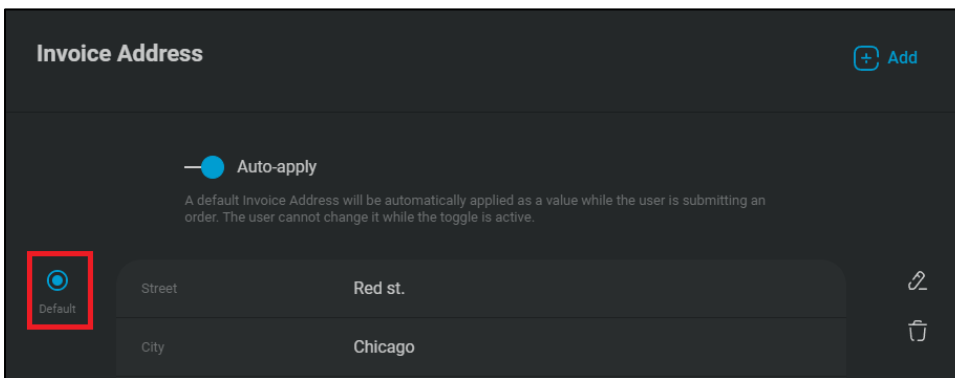
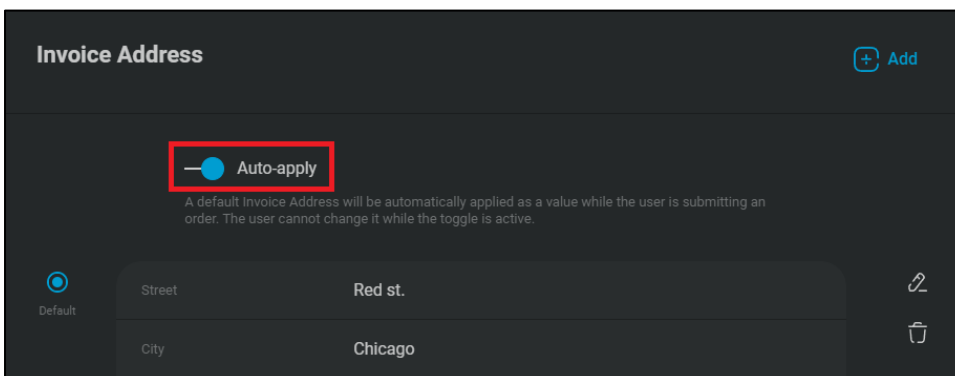To edit the existing address, click the **pencil** icon.

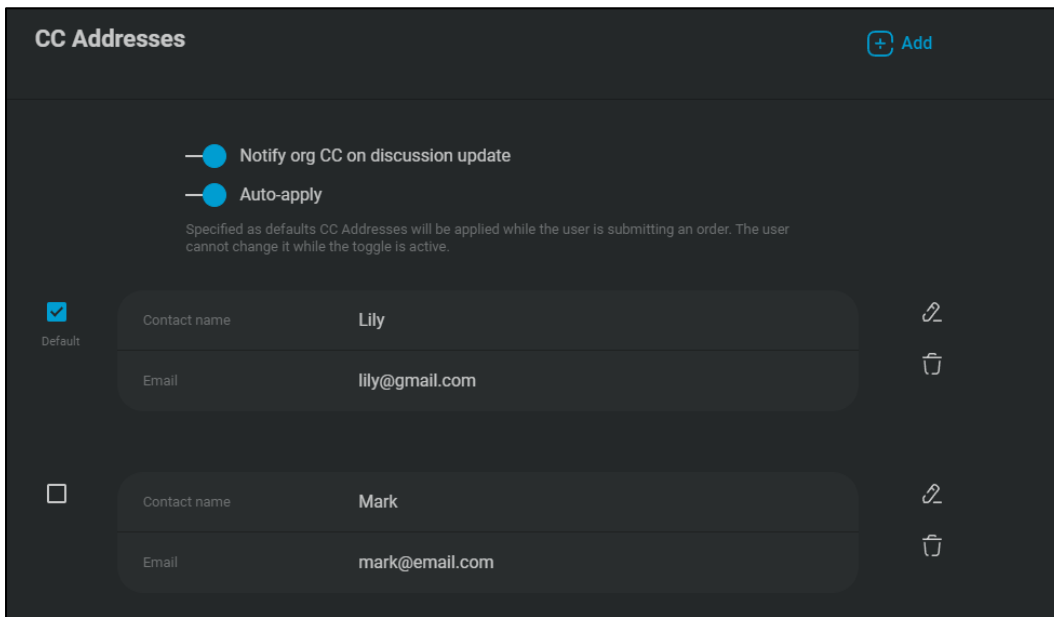To remove the address from the list, click the **trash** icon.

One of the report addresses can be marked as default. In that case, it will be selected and displayed as a default address during the order creation.
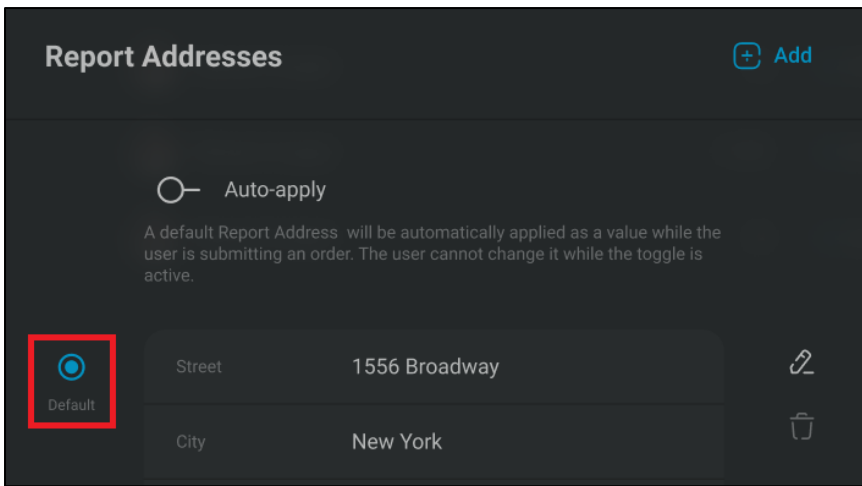
Also, you can turn on the auto-apply setting. The default address will be automatically applied to orders created for this organization. And users will not be able to change the report address.
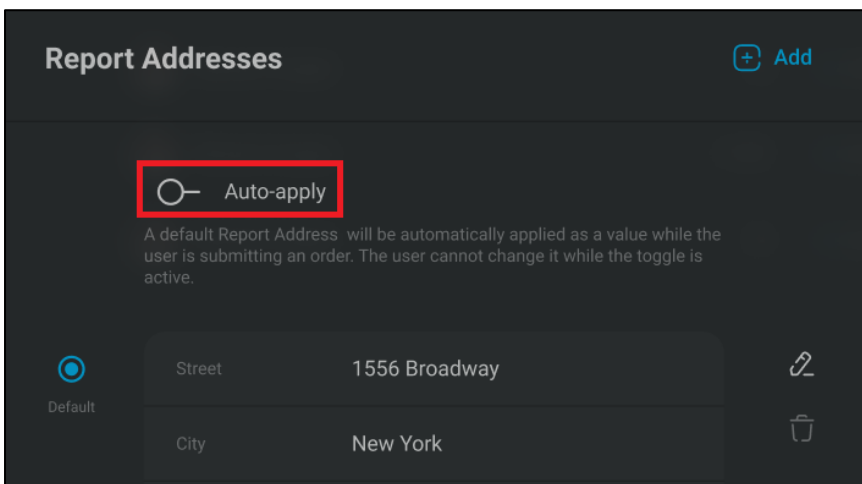

Invoice Address section
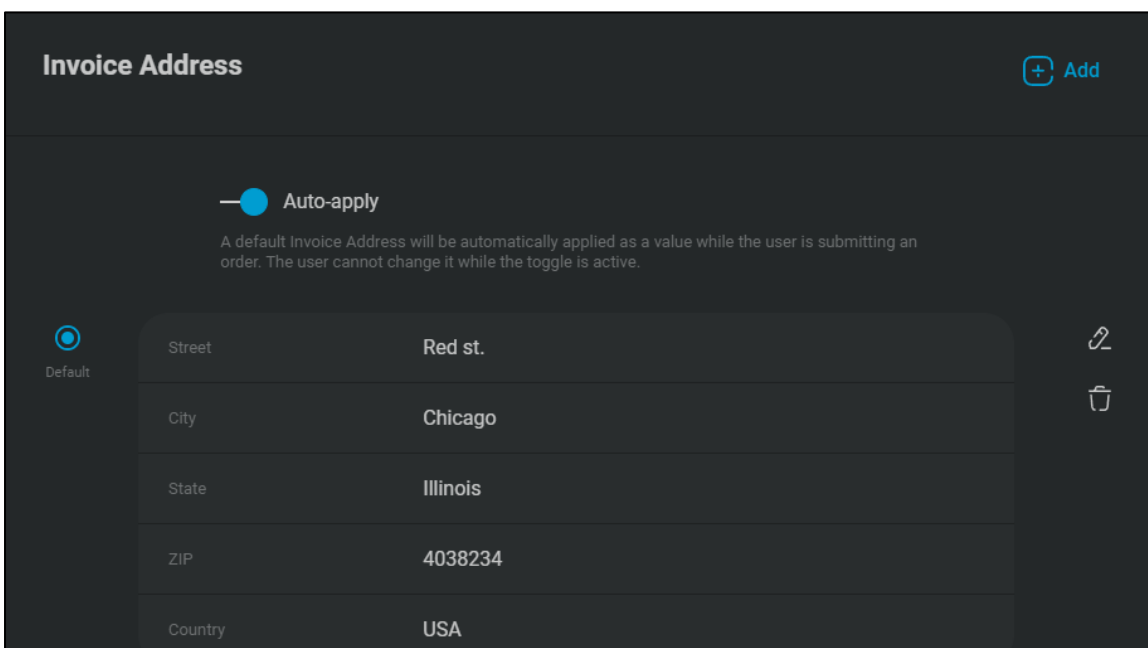
Contains the list of invoice addresses of the organization.

Click the **Add** button to add a new invoice address.

The **Add Invoice Address** dialog will be open.

Specify the street, city, state, ZIP code, country and/or email address and click the **Add** button.

To edit the existing address, click the **pencil** icon.

To remove the address from the list, click the **trash** icon.

One of the invoice addresses can be marked as default. In that case, it will be selected and displayed as a default address during the order creation.

Also, you can turn on the auto-apply setting. The default address will be automatically applied to orders created for this organization. And users will not be able to change the invoice address.

CC Addresses section

This section contains the list of CC addresses of the organization.

Click the **Add** button to add a new CC address.
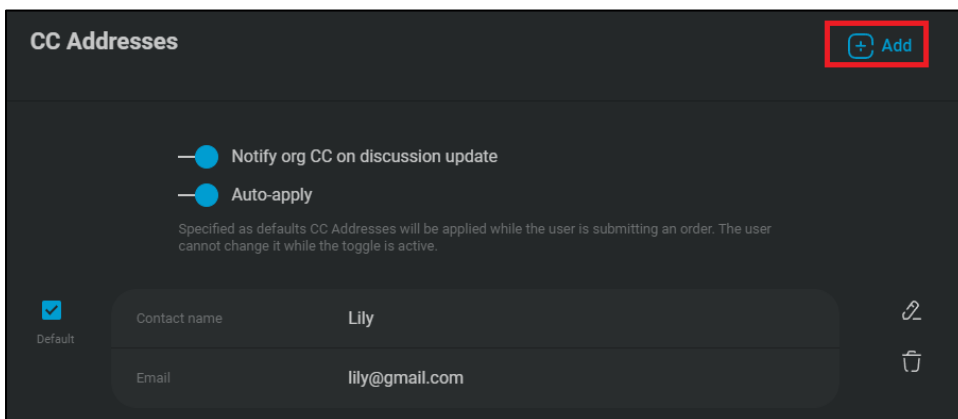
The **Add CC Address** dialog will be open.

Specify the contact name and email address and click the **Add** button.

To edit the existing address, click the pencil icon.
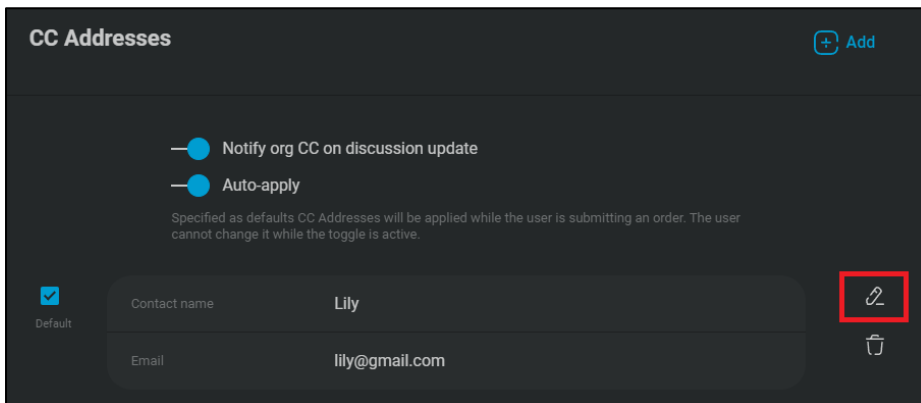
To remove the address from the list, click the **trash** icon.
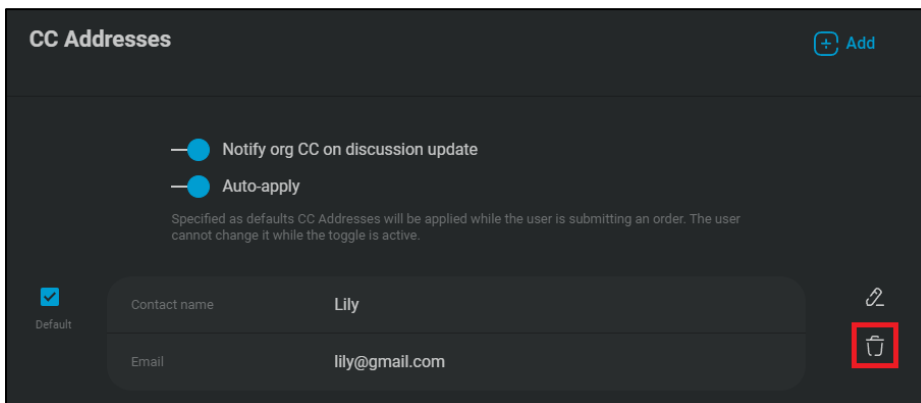
One or several CC addresses can be marked as default. In that case, they will be selected and displayed as default addresses during the order creation.
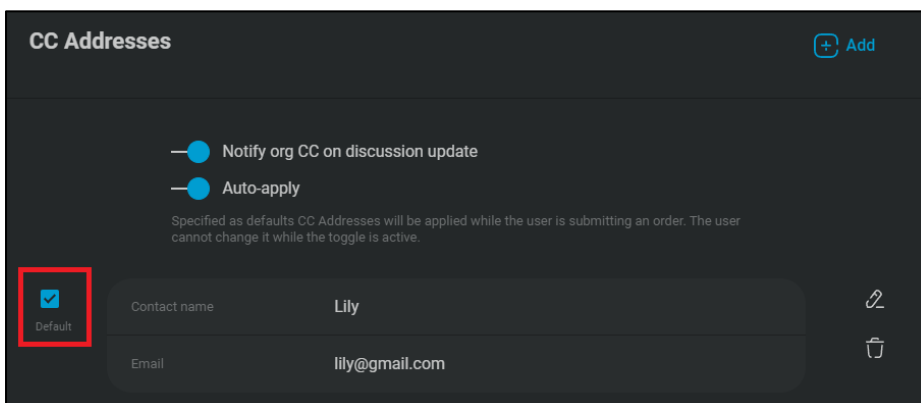
Also, you can turn on the auto-apply setting. Default addresses will be automatically applied to orders created for this organization. And users will not be able to change the CC addresses.
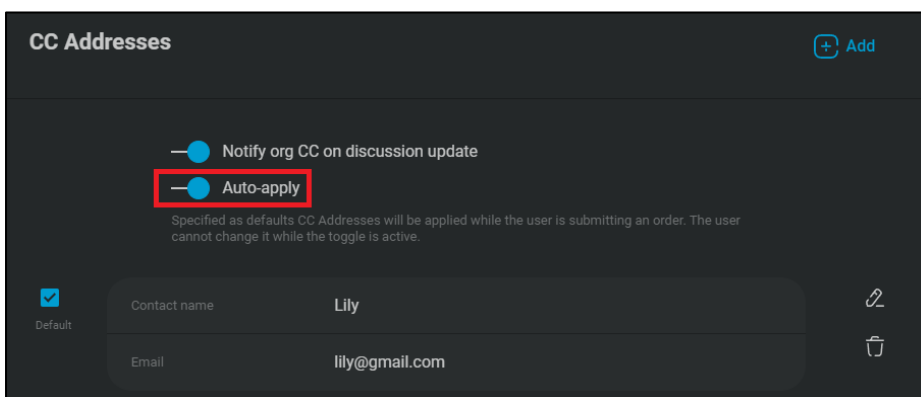
If it is configured by global administrators, that organization CC addresses should be notified about new messages in discussions, CC addresses specified for the organization will receive emails about that. You can turn it off for your organization clicking the **Notify org CC on discussion update** toggle.
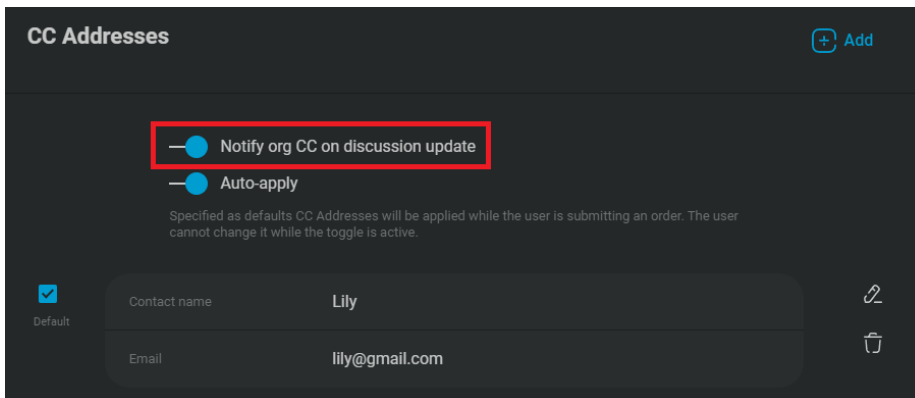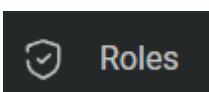

If it is turned on, CC addresses of your organization will not be overwhelmed by such notifications. If you want them to be notified and take a part in discussion of orders related to your organization, turn the toggle on.
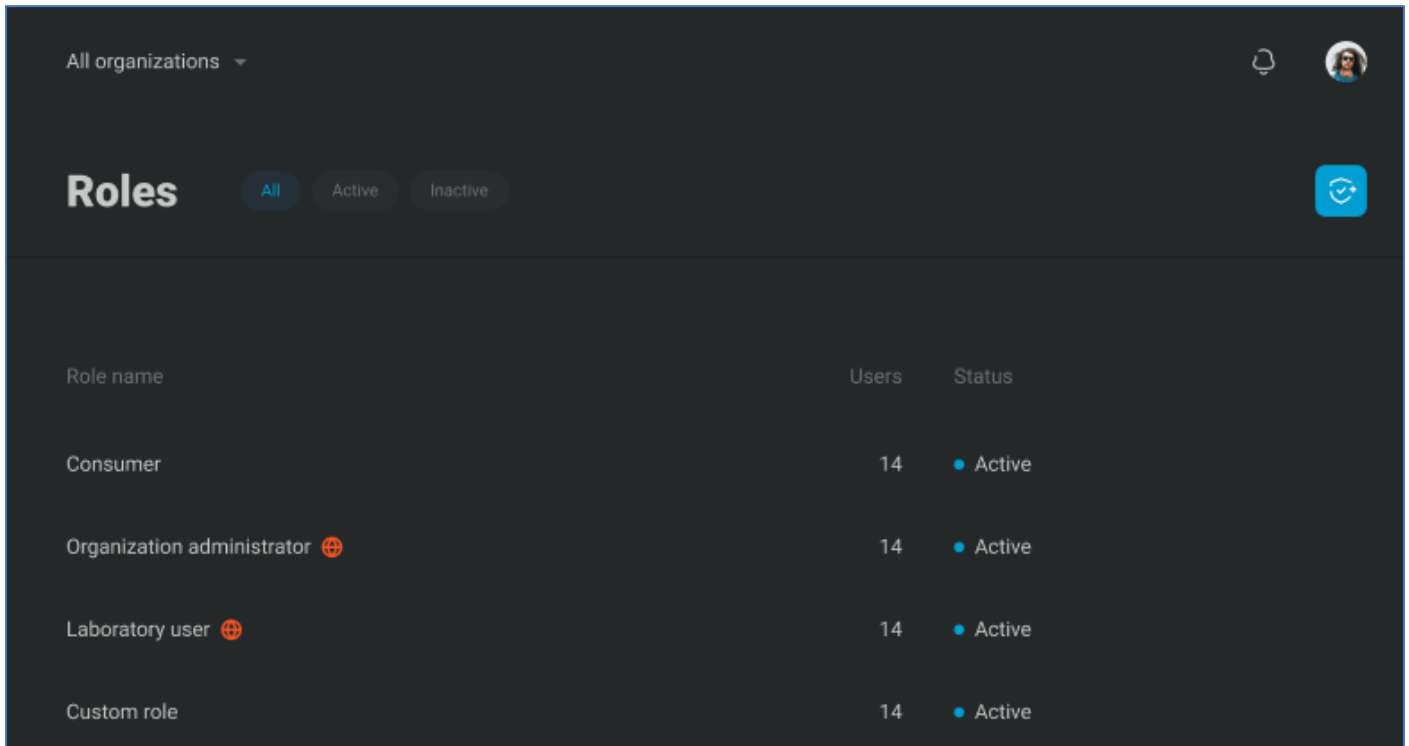
Role Management
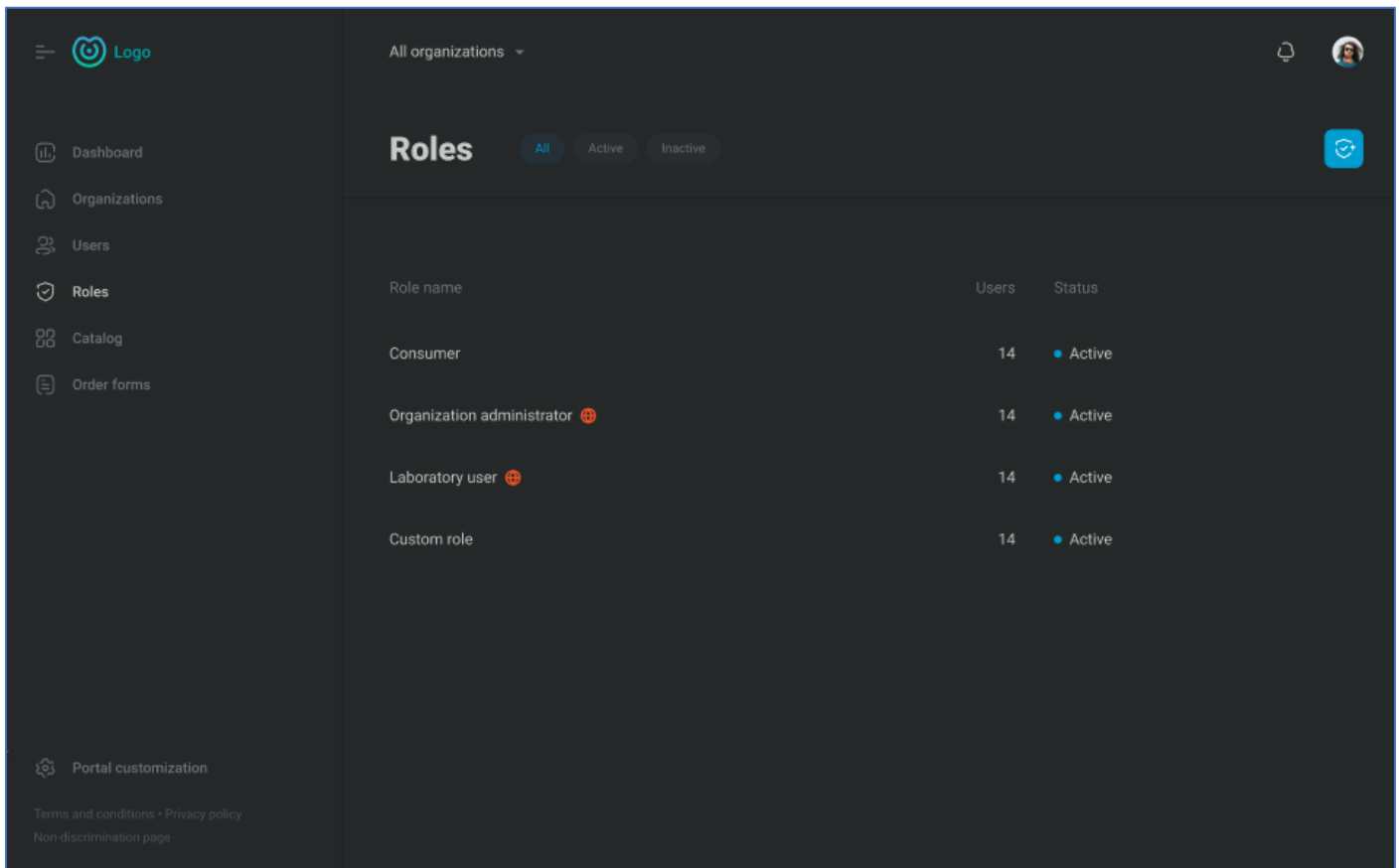
Roles define permissions and capabilities for all portal users. Some screens and functionality may not be available for different users, and this is regulated by their roles in different organizations and the permissions of these roles. All users should have a role in every organization in which they are members. Only global administrators and org administrators can manage user roles. Click the **Roles** button in the Left menu or the Dashboard to open the **Roles List** screen.

Roles List

This page displays the list of all global roles in the system and custom roles associated with organizations in which you have the *Roles management* permission. Global administrators can see and manage all roles.

Pre-defined global roles:

- Consumer
- Org admin

These roles can be used by all the portal organizations, they cannot be removed, deactivated or edited.

Custom roles:

- The list of roles configured by administrators.

Custom roles can be global (available for all organizations) or can be associated with specific organizations. Custom roles can be deactivated/activated or edited.

The table with roles contains the following columns:

- Role name
- Users – Number of users that play this role.
- Status – Roles can be Active or Inactive.

Global roles (available for all organizations) are marked with the special icon .
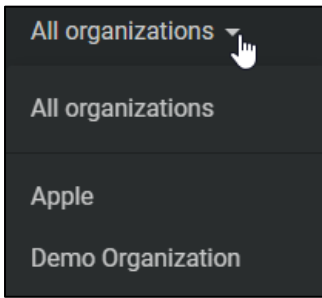
Use sorting and contextual filters to find needed roles.
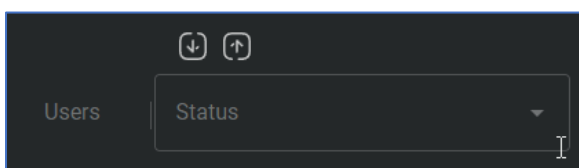
Use global filters to quickly find Active or Inactive roles.
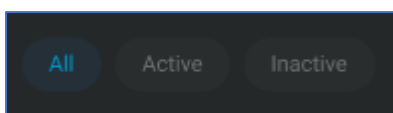
And roles can be filtered by the organization as all items on other portal screens.

Click on the record to open the **Role Details** dialog.

Global admins and org administrators can create new custom roles. Click the **Create role** button at the top-right corner of the page to open the **Create Role** dialog.

Create Role

To create a new role, you need to specify the custom name and permissions for it. If the All organizations checkbox is checked, the role will be global, so all organizations can assign this role to their members.

The list of permissions contains 2 sections: Administrative permissions and Consumer permissions. Click checkboxes to give users with this role corresponding permissions.

If the role contains at least 1 administrative permission, the user with this role is considered as an administrator and the Administrative part of the portal is available for him/her. Otherwise, the user can work only with the Consumer part (depending on other roles of this user).

User management permissions allow administrators with this role to work with other users:
- View user list – Allows to open the **Users List** and see users of the organizations in which this permission is ON.
  - View user details – Allows to open the **User Details** dialog.
    - Edit user details – Such admins can not only see, but also edit user information.
    - Change user record status – Admins with this permission can activate or deactivate other users.
    - View user sessions – Allows to open the Sessions tab of the **User Details** dialog and view user sessions.
  - Invite user – Only admins with this permission can invite new users to the system or invite existing users to new organizations via the Add organization to user or the Add user to organization dialogs that can be open from the **User Details** or the **Organization Details**.
  - Set user roles – Allows to assign roles to users for the organizations in which this admin has this permission.
  - Change user access status - Admins with this permission can turn on / turn off the access of users to the organizations in which admins have roles with this permission, remove users from these organizations, or remove organizations for these users.

Organization management permissions allow administrators to work with organizations: view or edit them. Please note, that only global administrators can create new organizations.
- View organization details – Admins with this permission can open the **Organizations List** with the list of all organizations where the admin has the *View organization details* permission in these organizations' roles. Also, this permission allows to open the **Organization Details** dialog.
- Edit organization details – Such admins can not only view organization details, but also edit them.
- Change organization status – Allows to activate or deactivate organizations in which the admin has this permission.

Order Forms management permissions allow administrators to manage order forms:
- Manage order forms – Admins with this permission can create new order forms, see the **Order Forms List**, open the **Order Forms Details**, and edit them. It is enough to have this permission in at least one organization to work with all order forms.

Consumer permissions are available for all users of the portal:
- Contact us – All users have this permission by default and it cannot be removed. It means that all users can write support requests.

- View orders list - All users have this permission by default and it cannot be removed. All users can open the **Orders List** screen and see orders. The list of displayed orders depends on other consumer permissions.
- View order details - All users have this permission by default and it cannot be removed. Users can open the **Order Details** dialog of orders they own (or orders of organizations they manage), see ordered items, order details fields and addresses, participate in discussions, see or manage attachments.
    - View results – Users with this permission can open the Results tab of the **Order Details** dialog.
    - View hidden fields – Some fields (order and sample details) can be marked as hidden on the **Order Form Details** dialog. These fields should not be displayed for consumers, but users with the *View hidden fields* permission can see them on the **Order Details**.
    - View audit trails – The **Audit Trails** screen displays all records about order changes. Of the predefined roles, only global administrators have access to this screen. In addition, users with custom roles that contain the *View audit trails* permission can open audit trails for orders that they have access to.
- Manage own orders – Users with this permission can create orders for themselves, edit and reorder orders. They will see orders of which they are owners on the **Orders List** screen.
    - Manage consumer's orders – This permission allows to create orders to other users, edit and reorder them. Such users can see not only their orders, but also orders created for organizations in which they have the *Manage consumer's orders* permission.

When the role name and the permissions are specified, click the **Create** button to add the role to the system.

Role Details
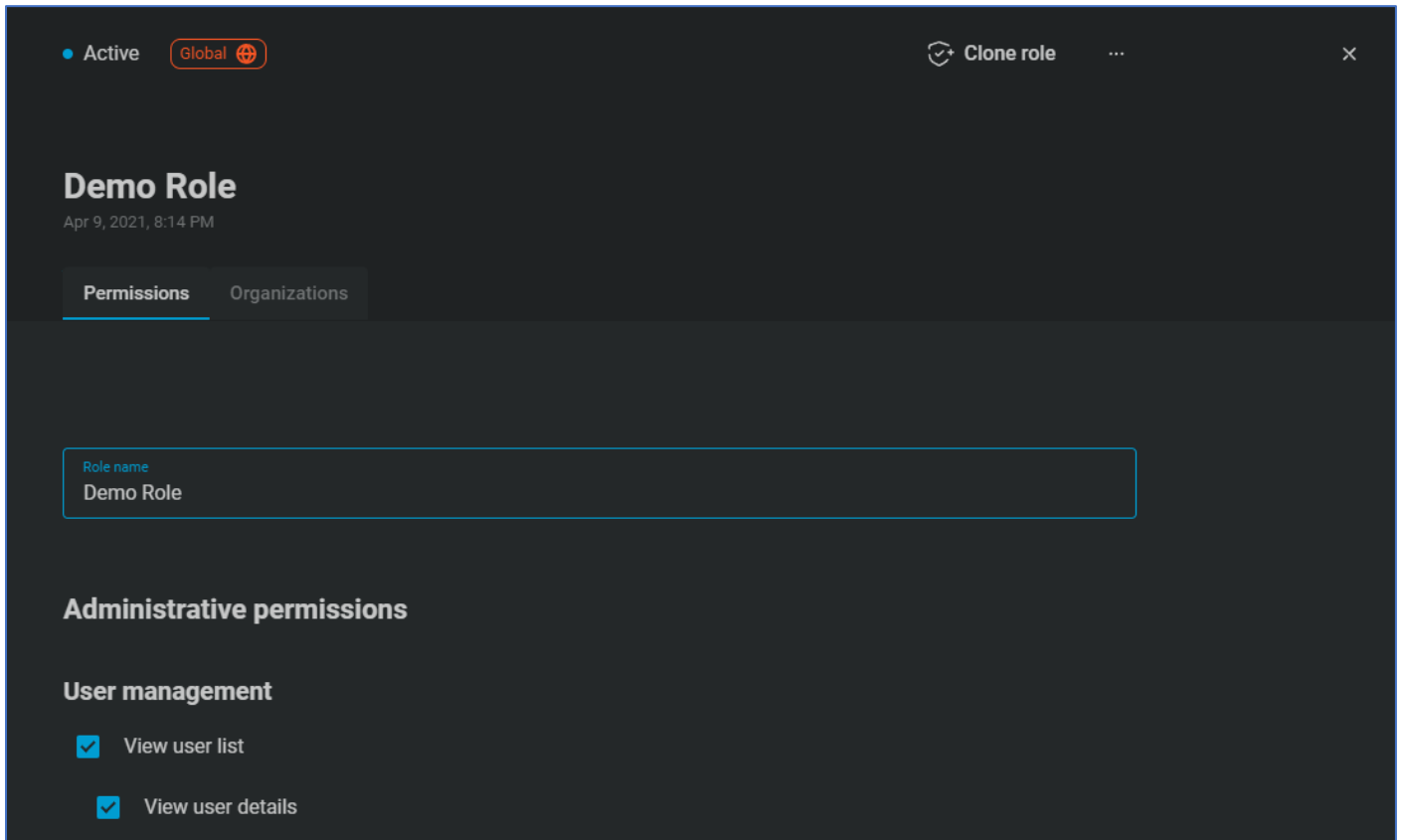
The **Role Details** dialog can be open by clicking on any role in the **Roles List**.

On this screen, you can see the details of the role or edit it.

Roles can be active or inactive. They can be global or associated with specific organizations.
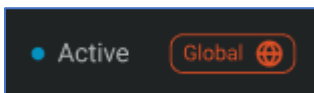
Click the **Clone role** button at the header of the page to create a new role with the same parameters.
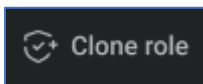
Click on the "…" icon to open the menu. Select Activate or Deactivate menu options to change the role status. Users with an inactive role will not have its permissions in all the organizations where they play this role.
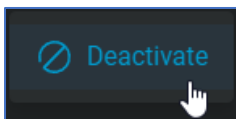
Permissions tab
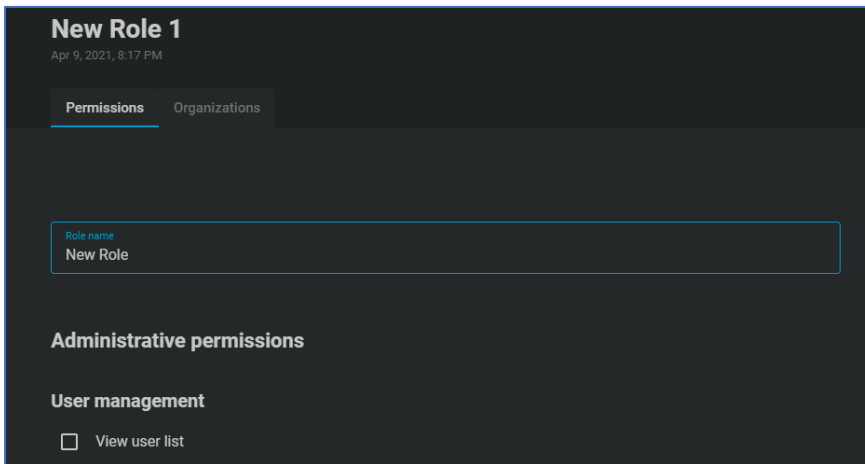
On the **Permissions tab**, you can change the role name or permissions and click the **Save** button to apply changes. See more details about permissions and their meaning in the Create Role section of this document.

Organizations tab
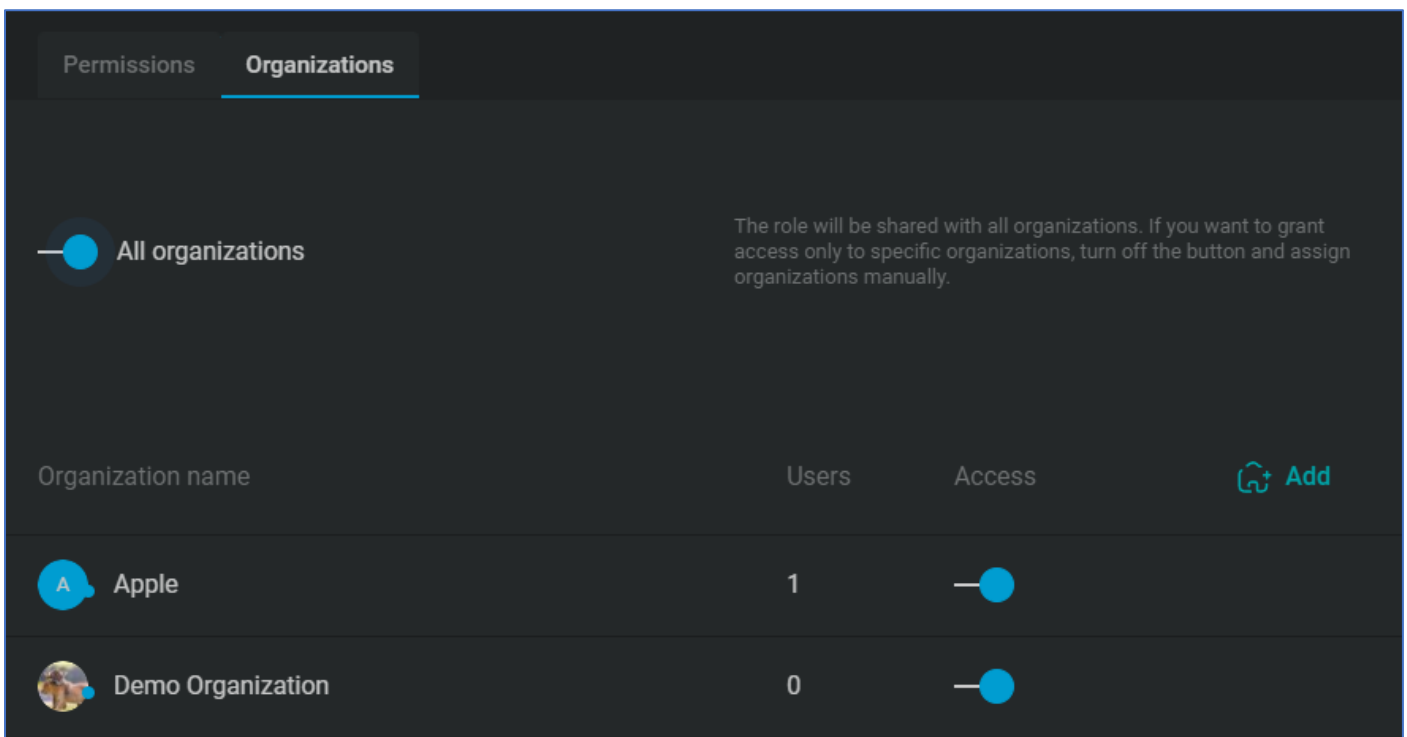
The **Organizations tab** displays the list of organizations for which this role is available.

To make the role global and available for all organizations, turn on the **All organizations** toggle. If you want to grant access only to specific organizations, turn off the button and assign organizations for this role manually.

On the Organizations tab, global administrators will see all organizations associated with this role, org administrators will see organizations that are associated with this role and in which they have the Org admin role.

You can see the organization name, number of active users that are members of this organization with the current role, and the access status.

To open the details of the organization (if you have the *View organization details* permission in this organization), click on its name. The **Organization Details** dialog will be open. See more information in the Organization Details section of this document.

To change the access status for this role in a specific organization, you need to be a global admin or org admin in this organization. Click the button to switch its value.

Members of an organization that take an active role that does not have the access to this organization will keep all role permissions. But if the access is turned off, this role cannot be assigned to the organization members anymore.

Click the **trash** icon to remove the association between this role and the organization.

If the association between a role and an organization is removed, all members of the organization that take this role can continue working with the portal with all role permissions in this organization. But the role cannot be assigned to new or existing organization members.

To link this role with a new organization, click the **Add** button. You need to be a global administrator or an org administrator in all organizations associated with this role to perform this operation.
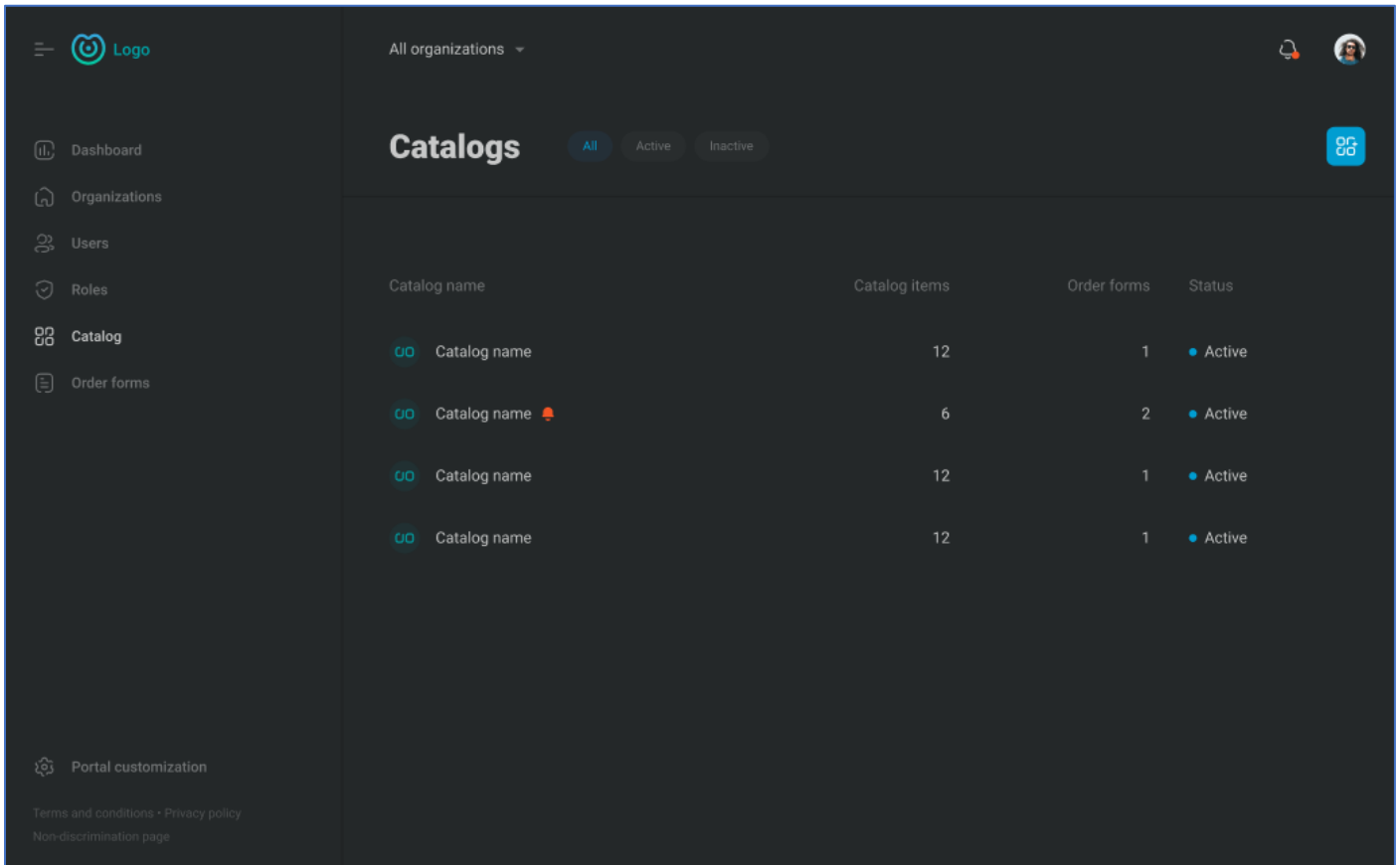
The **Add Organization** dialog will be open.
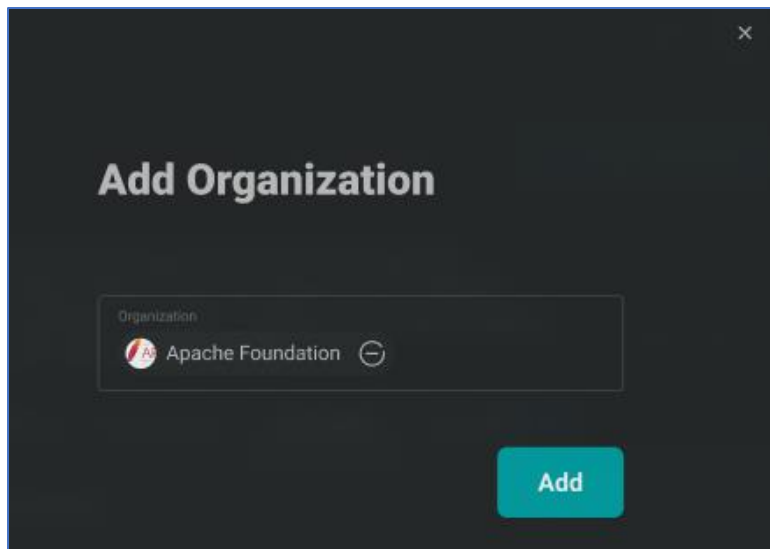
On this dialog, you can select one or several organizations that do not use this role and which you manage.

Click the **Add** button to associate the role with the selected organizations.

Catalog Management

Catalog is a collection of items that can be ordered from the laboratory by consumers. Catalogs include location codes from the laboratory and samples include analyses. Administrators use catalogs for order forms – a template that is used to create orders and order tests in the laboratory.

Only global administrators can manage catalogs.

To open the **Catalogs List** screen, click the Catalogs button in the Left menu or on the Dashboard.
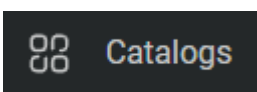
Catalogs List

On this page, the list of all catalogs in the portal is displayed. You can see the catalog name, number of its items, number of order forms that use this catalog, and the catalog status – Active or Inactive.

Use global filters to quickly filter items by the status.
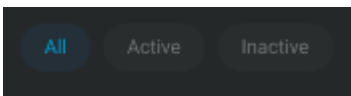
To find needed items, apply sorting or contextual filters in the table.
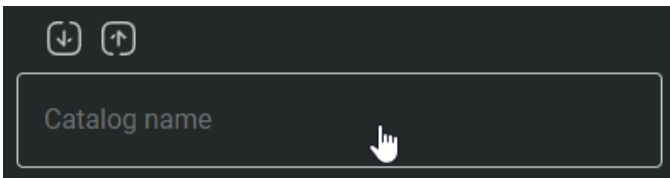
Click on the record to open the **Catalog Details** dialog.

There can be cases when the catalog was updated:

- Analyses were added or removed in the laboratory.
- Location codes were removed in the laboratory.
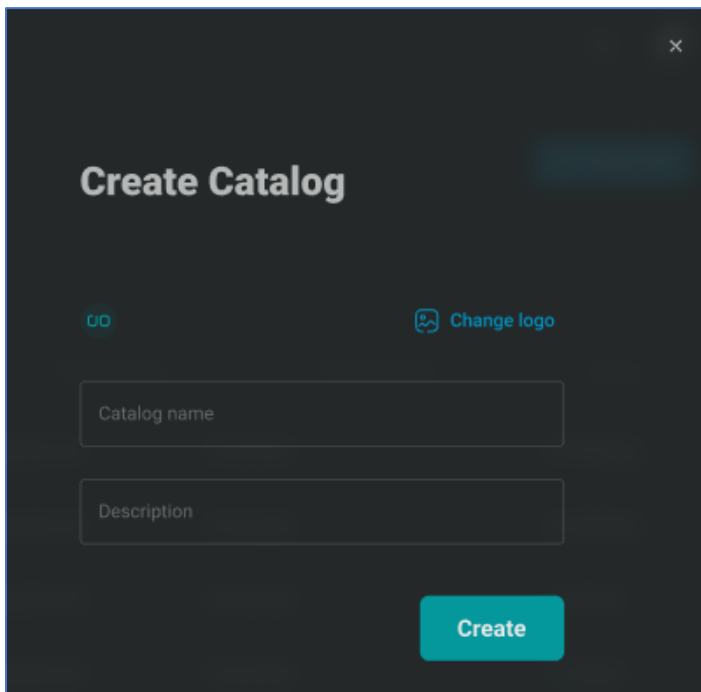
In these cases, catalogs and catalog items will be updated automatically and administrators will see red bell icons near the catalog name on the **Catalogs List** screen.
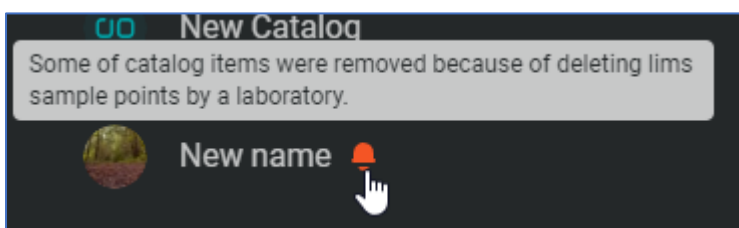
Hover the mouse over the icon to see the description of changes.

To create a new catalog, click the **Create catalog** button and open the **Create Catalog** dialog.

Create Catalog

This screen serves to create a new catalog with samples and analyses.

Click the **Change logo** button to specify the logo for this catalog. The **Change Logo** dialog will be open.
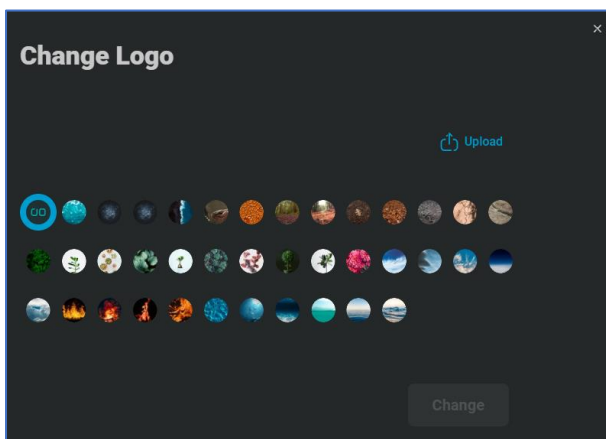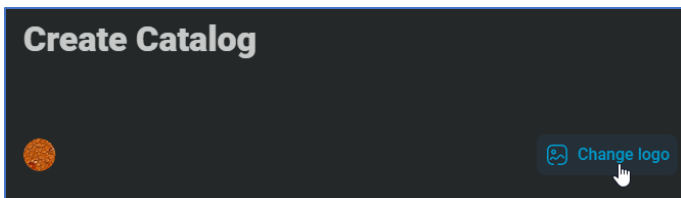

Select one of the predefined logos or click the **Upload button** to upload your picture. The **Crop Image** dialog will be open.
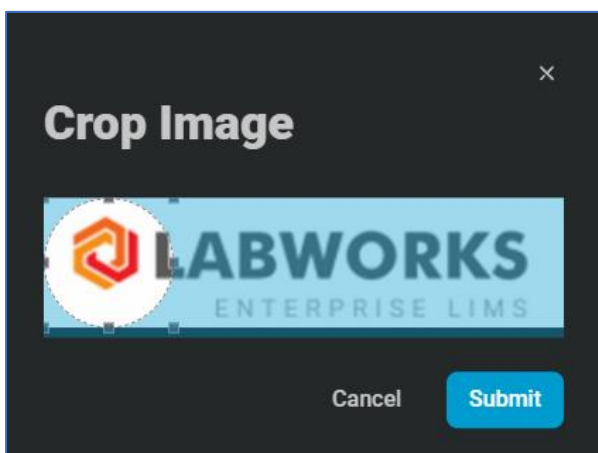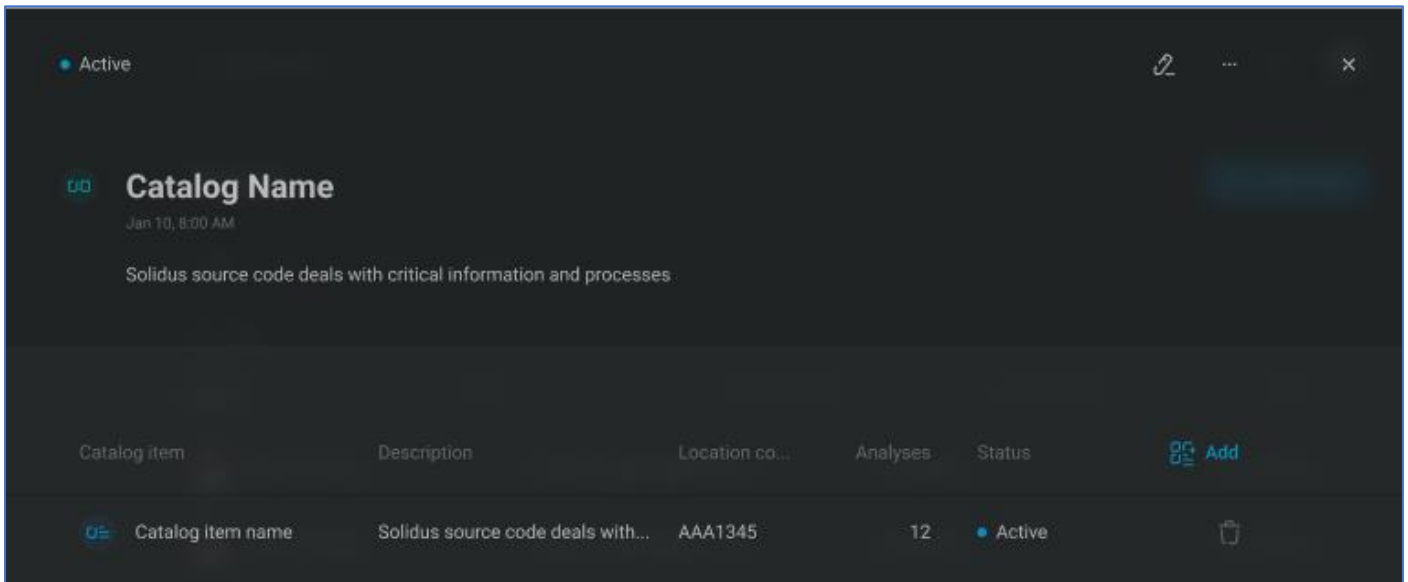

Crop the picture and click the **Submit** button.

Once the logo is selected, click the **Change** button.

You can change the picture by clicking the **Change logo** button.

Enter the catalog name and the description if needed and click the **Create** button to add the catalog to the portal.

Catalog Details

This dialog can be open by clicking on any row on the **Catalogs List** screen or when a new catalog was created.

On this screen, you can see the information about the catalog, its status.

If some location codes included in this catalog have been removed in the laboratory, the warning will be displayed at the header part of the **Catalog Details** screen.
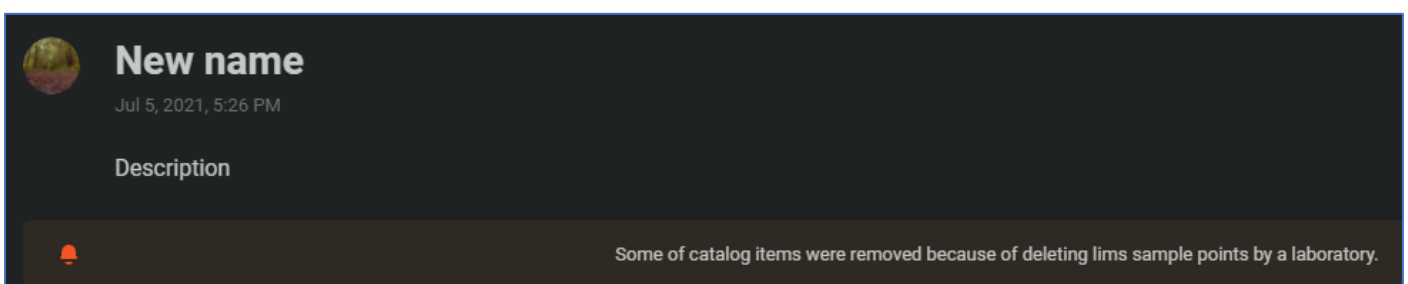
Click the **pencil button** to edit the catalog.
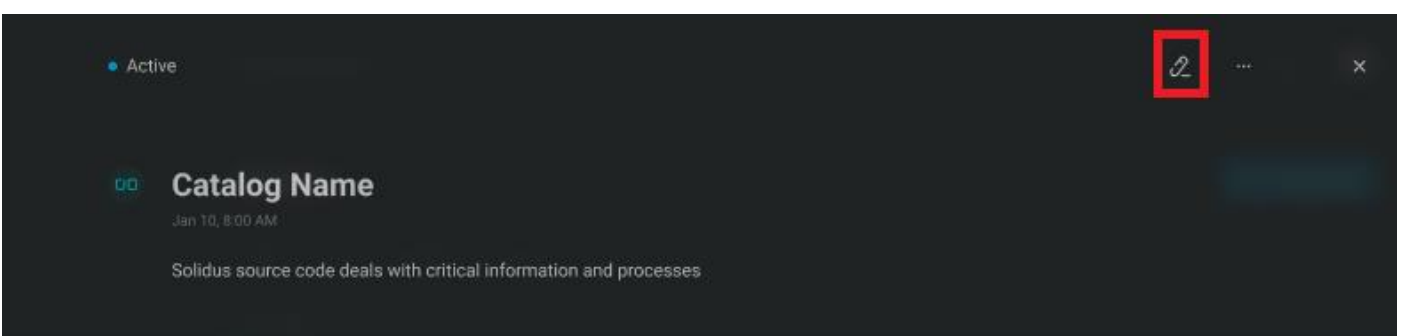
The Catalog Details will be open in the edit mode. You can change the logo, catalog item name, or the description. Click the **Save** button to apply changes. Click the **Cancel** button to cancel the catalog editing and reset changes.
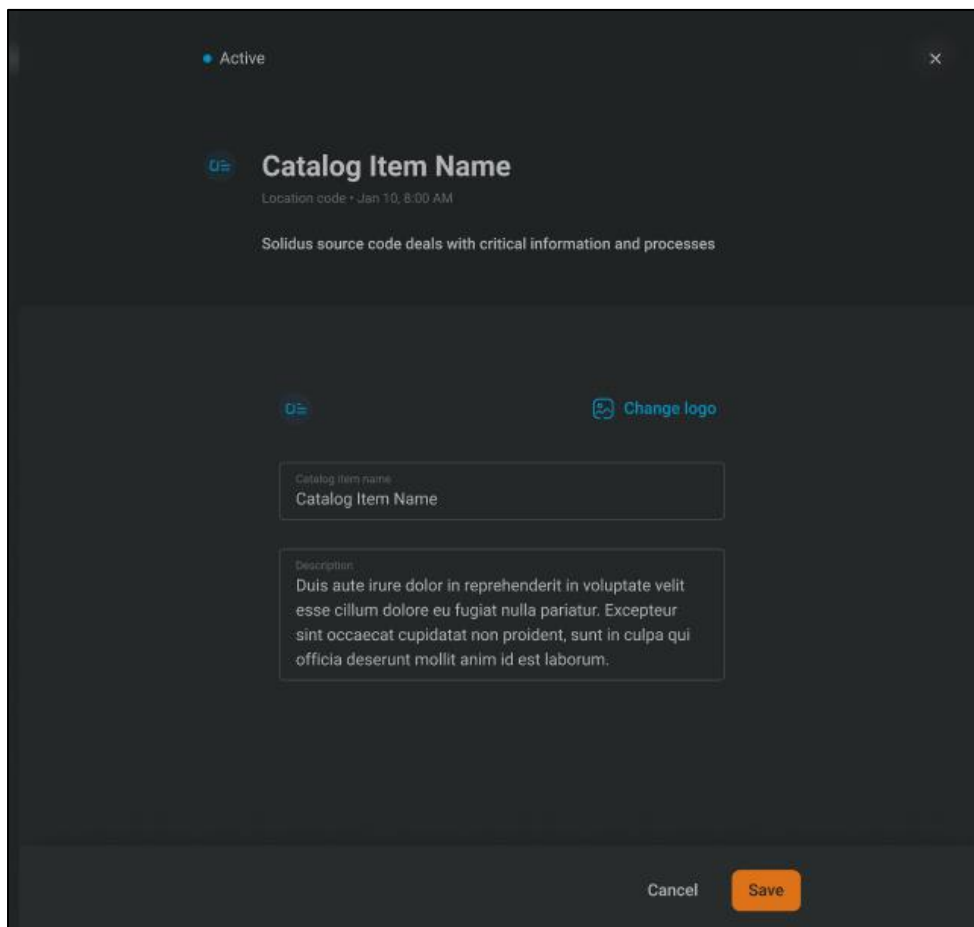
Not needed catalogs can be deactivated. Click the "…" icon to open the menu.
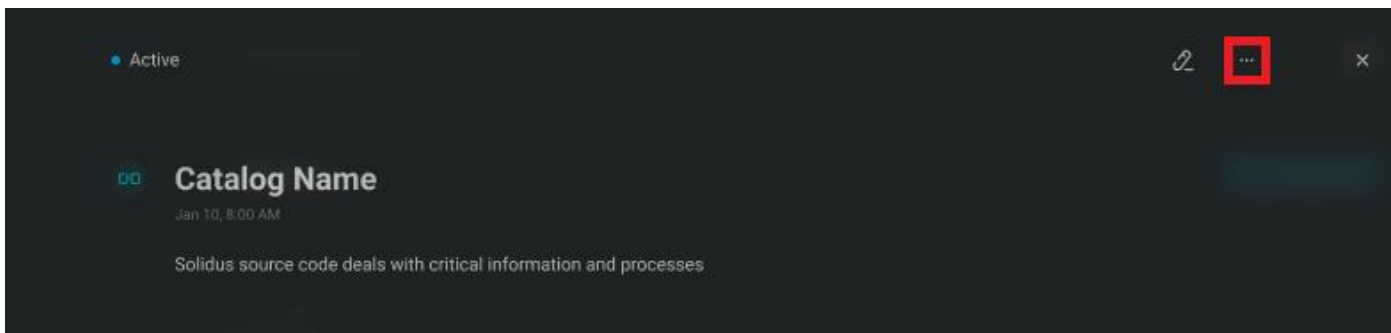
Select the Deactivate menu option. You can bring it back at any time by selecting the Activate menu option.
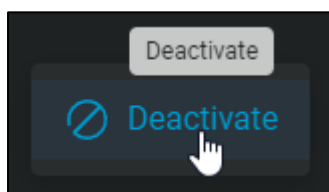
Catalog items of inactive catalogs cannot be added to an order based on order forms that includes this catalog. This does not affect already created orders. But when they are open for editing, catalog items of inactive catalogs will be removed from the orders.

On the Catalog Details dialog, you can see the list of catalog items included into this catalog: the item name and logo, description, location code of LIMS, number of analyses in this sample, its status.

If analyses have been added or removed from the location code in the laboratory, the bell icon will be displayed for such catalog items in the list of the **Catalog Details** screen.

Hover the mouse over the icon to see the description of changes.

Click on any row to open the **Catalog Item Details**.

If you want to remove the sample from the catalog, click the **trash** icon.

If you need to add more samples to this catalog, click the **Add** button.

The **Add Catalog Item** dialog will be open.

On this dialog, you can choose needed location codes from LIMS or add all location codes available in LIMS. Please note that here names of location codes from LIMS are displayed, not custom Exchange Portal names for catalog items.
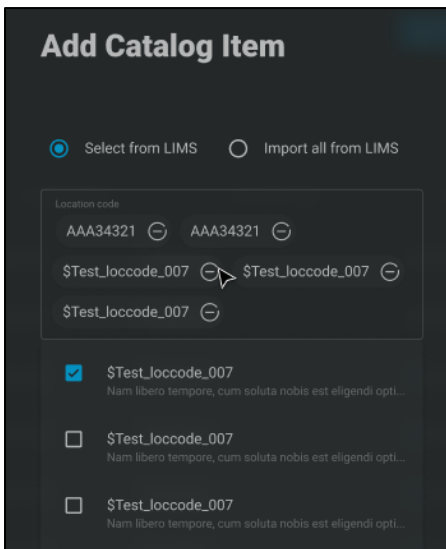
Type for searching needed items. On this screen, you can see all location codes with their names available in the LABWORKS Enterprise LIMS synchronized with the Exchange Portal.

Once samples are selected, click the **Add** button to add them to the catalog.

Catalog Item Details
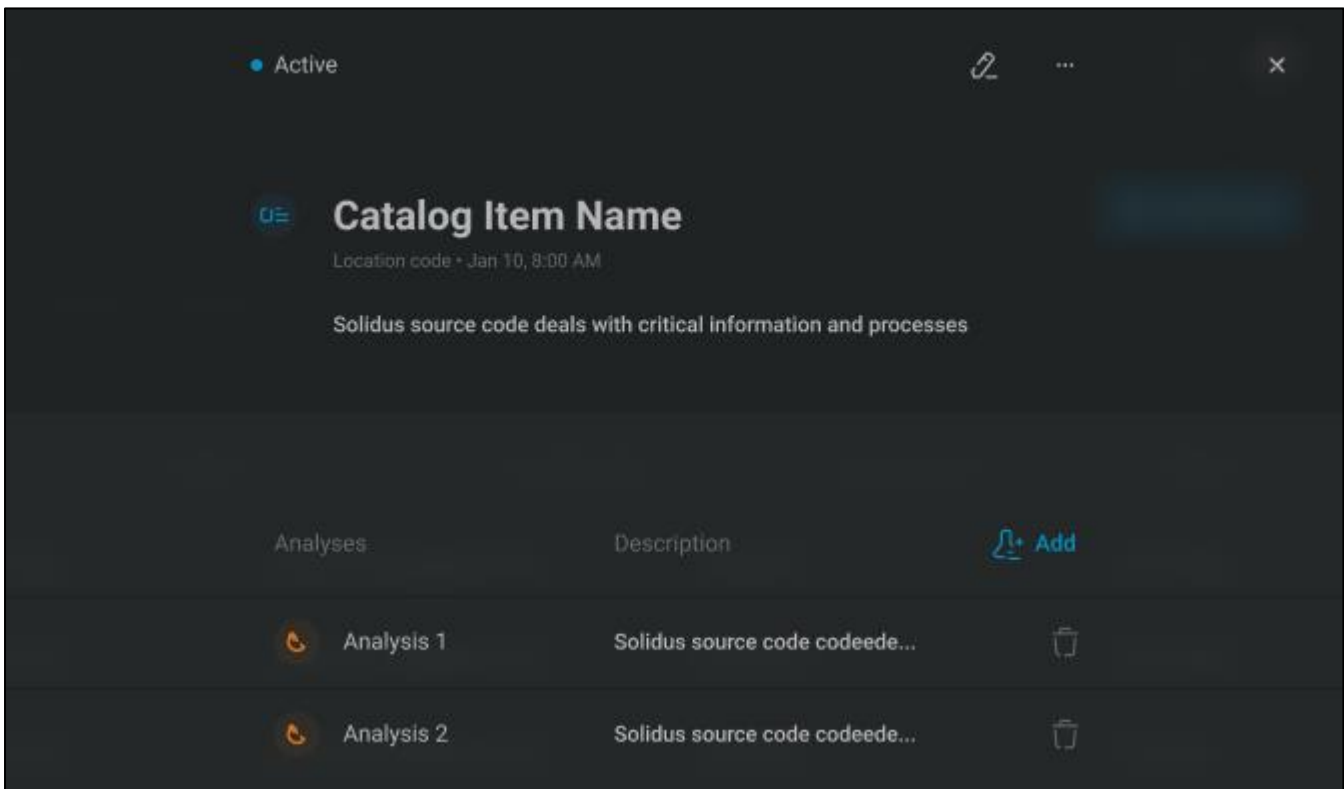
On this dialog, you can see the details of a specific sample that can be ordered from this catalog: its logo, name, description, LIMS location code name, and the creation date.
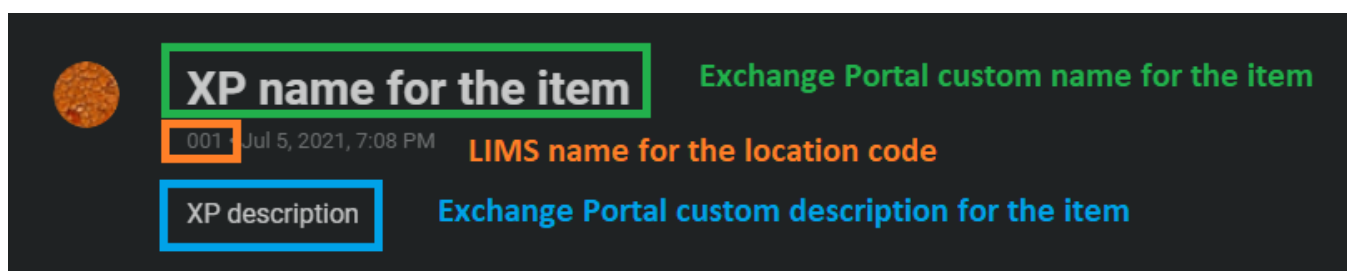
The catalog item custom name and description (not LIMS ones) will be used on all portal screens. So, the logic is the following:

- Location codes have names in LIMS.
- Global admins can set a custom name for a catalog item based on any location code on a per catalog basis.
- Consumers will see custom names specified for catalogs that are added to order forms when they create orders.

This also relevant for catalog item descriptions.

The warning will be displayed at the header part of the **Catalog Item Details** screen if new analyses have been added to the location code by the laboratory or some analyses were removed.
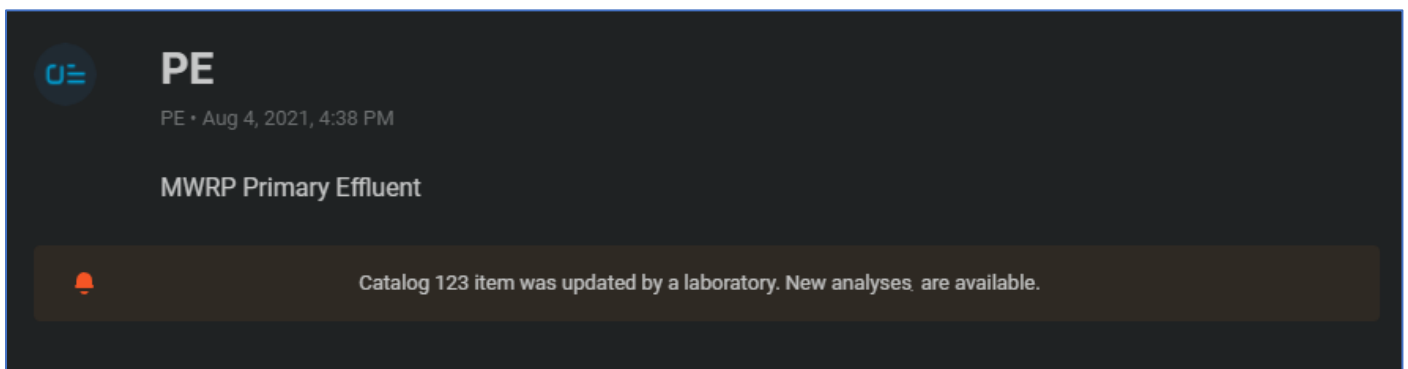
Catalog items can be active or inactive. Click the "…" icon ⬛ to open the menu and select the Activate/ Deactivate menu option to change the item status.
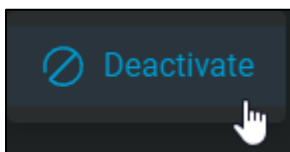
Inactive catalog items and their analyses cannot be ordered by consumers.

To edit the catalog item, click the pencil icon 🖉 and the dialog will be open in the edit mode. You can change the catalog item logo, name, and the description.
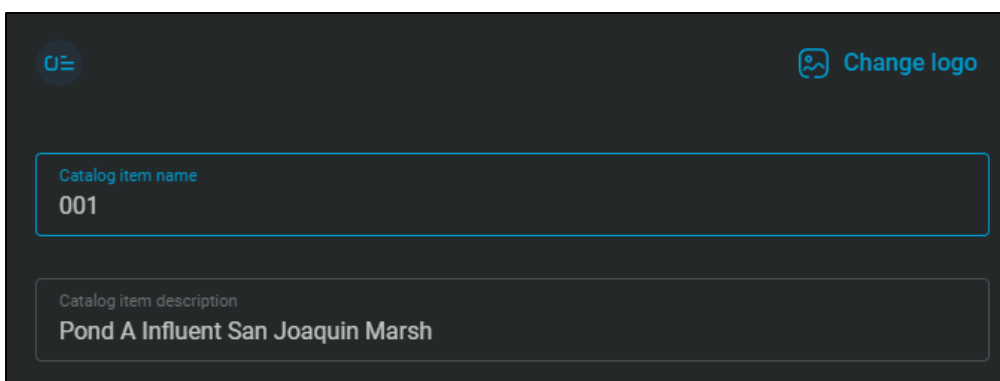
Click the **Change logo** button to specify the logo for this catalog item. The **Change Logo** dialog will be open.
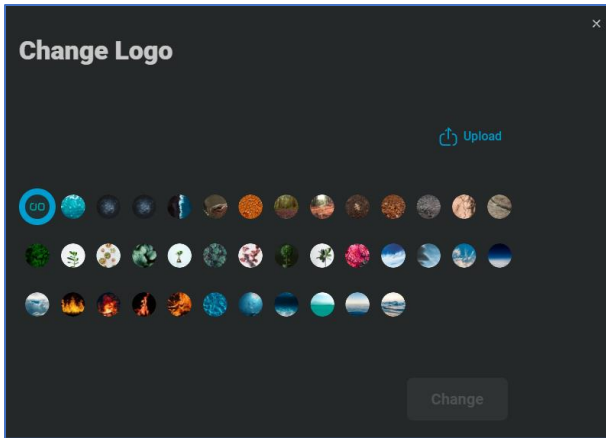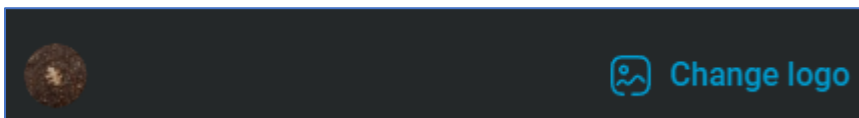
Select one of the predefined logos or click the **Upload button** to upload your picture. The **Crop Image** dialog will be open.
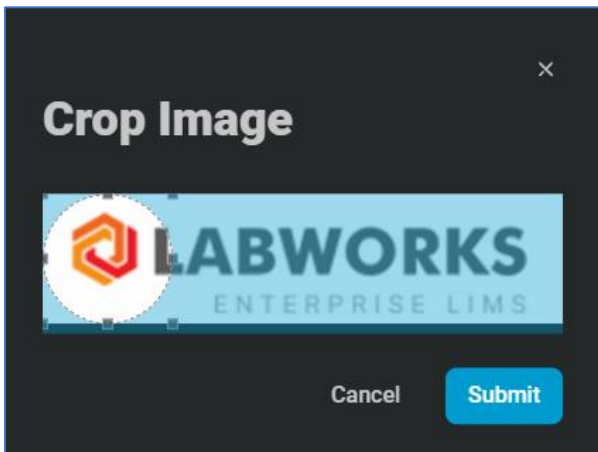
Crop the picture and click the **Submit** button.

Once the logo is selected, click the **Change** button.

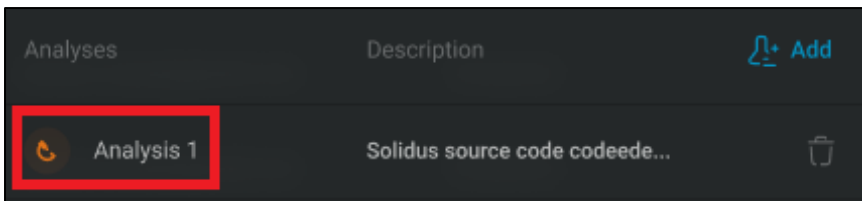You can change the picture by clicking the **Change logo** button.

When all needed information is updated, click the **Save** button to apply changes.

On the **Catalog Item Details** screen, you can see the list of analyses that this sample contains: the analyses logo, name, and description.
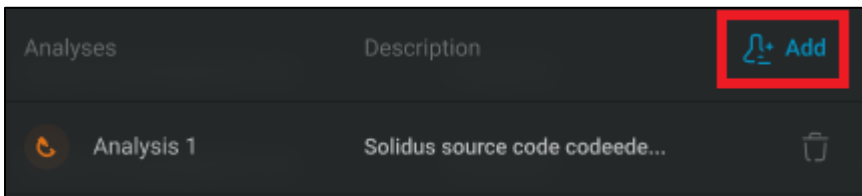

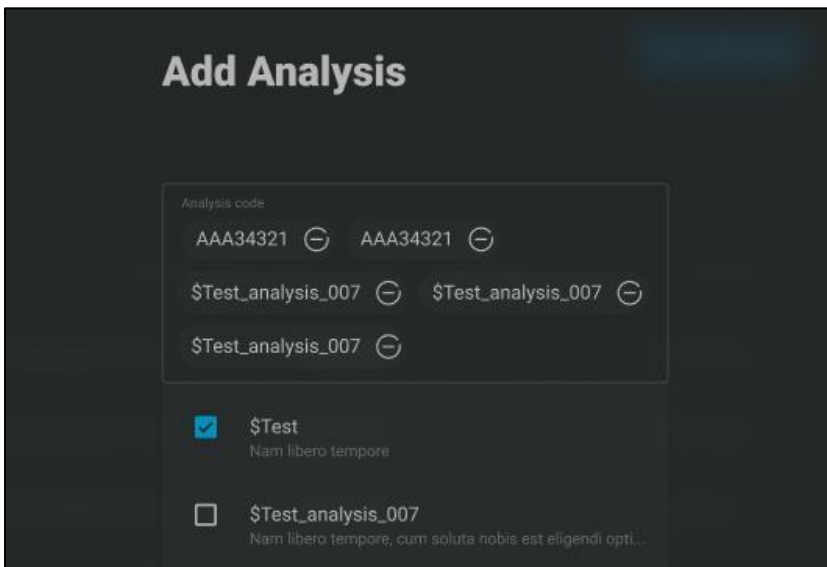Click on any row to open the **Analysis Details** dialog.

To remove the analysis from the catalog item, click the **trash** icon. This analysis will not be included to this sample.
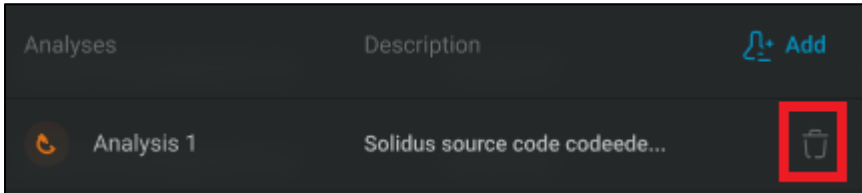
To add more analyses, click the Add button.



The **Add Analysis** dialog will be open.

On this dialog, you can type to search for needed analyses and select them. Analyses names and description are displayed on this screen. The following analyses are available for adding: all active analyses in LIMS for this location code which are not included in this catalog item yet. There can be single-component analyses, multi-component analyses, narrative, or grouped analyses. Bottle analyses are not supported by the Exchange Portal. Please note that here names and descriptions of analyses from LIMS are displayed, not custom Exchange Portal names.

When analyses are selected, click the **Add** button to add them to the catalog item.

Analysis Details
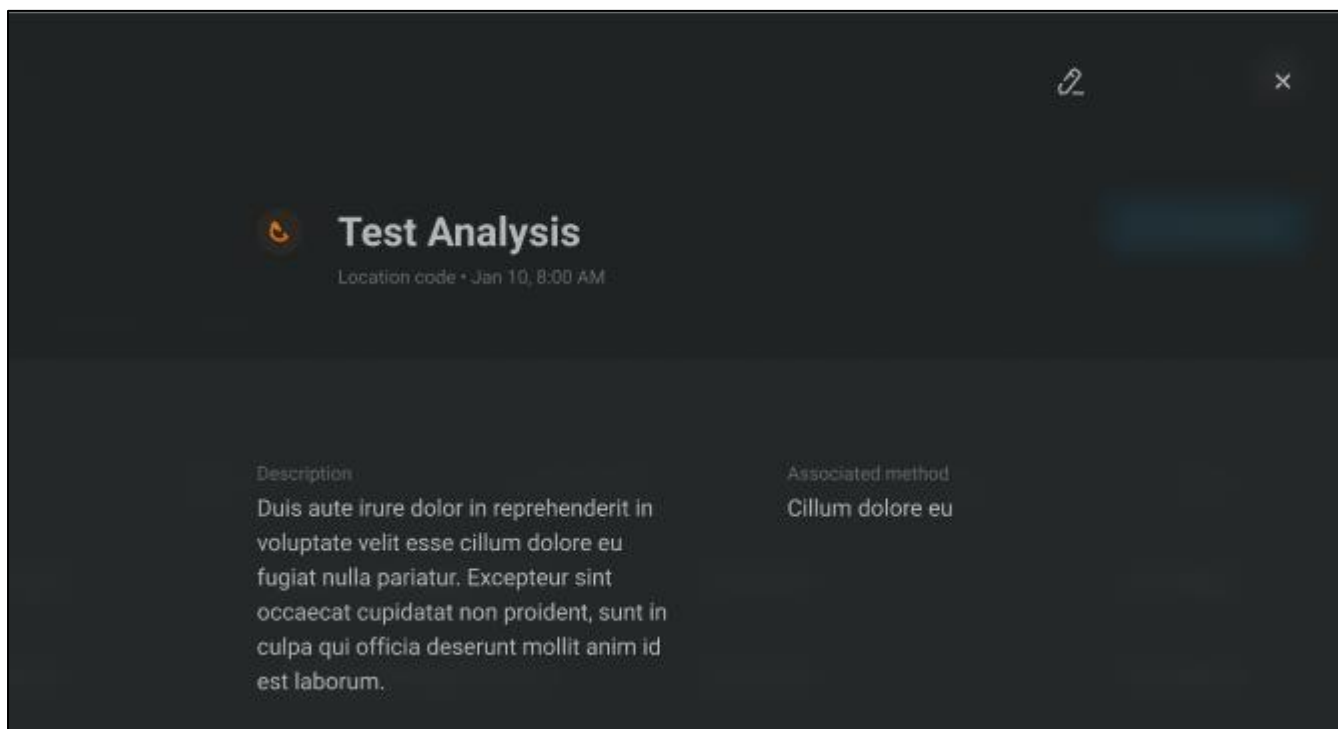
On this dialog, the analysis information is shown: its logo, custom name, description, LIMS analysis name, creation date, and the analysis method.
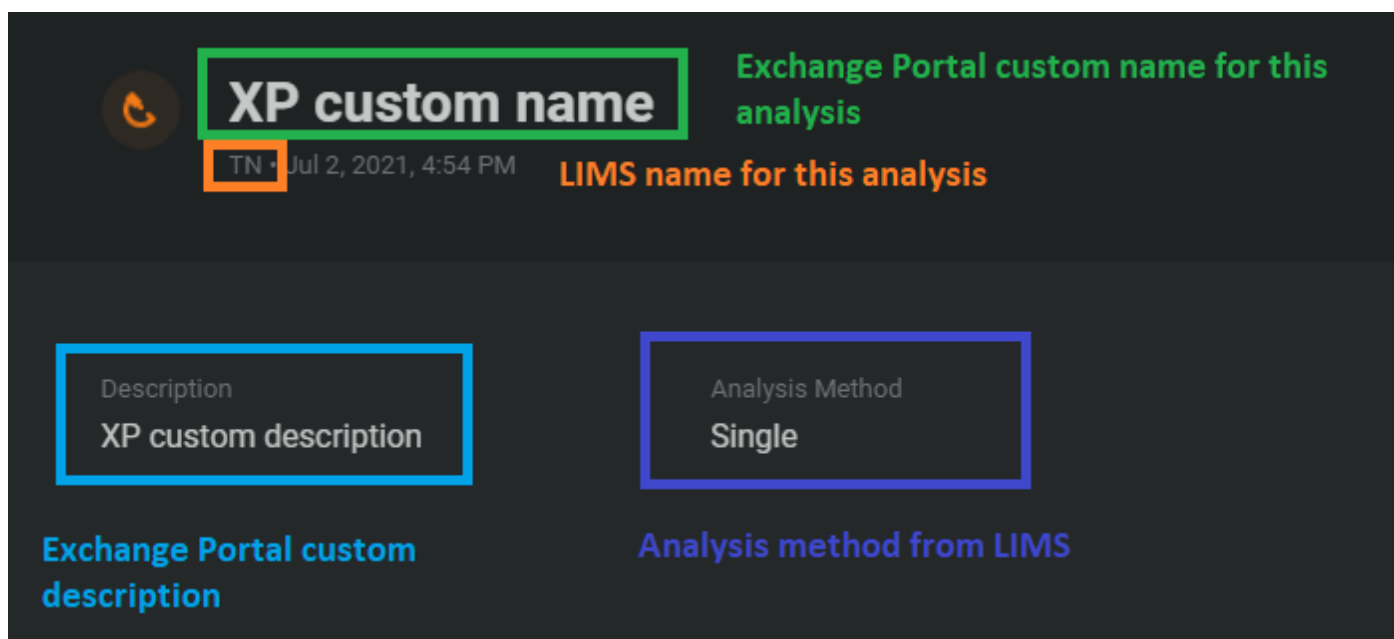
The analysis custom name and description (not LIMS ones) will be used on all portal screens. They do not depend on catalogs unlike custom names for catalog items. The same custom analysis names are used for all catalogs. So, the logic is the following:

- Analyses have names in LIMS.
- Global admins can set a custom name for an analysis for any catalog and it will be changed globally, for all catalogs and order forms.
- Consumers will see these custom names when they create orders (for all catalogs and all order forms).

This also relevant for the analysis description.

Analysis method can be single, multi-component, narrative, or group.

Multi-component analyses contain also the list of components in them.

Group analyses contain the list of analyses included in this group with their names and descriptions.
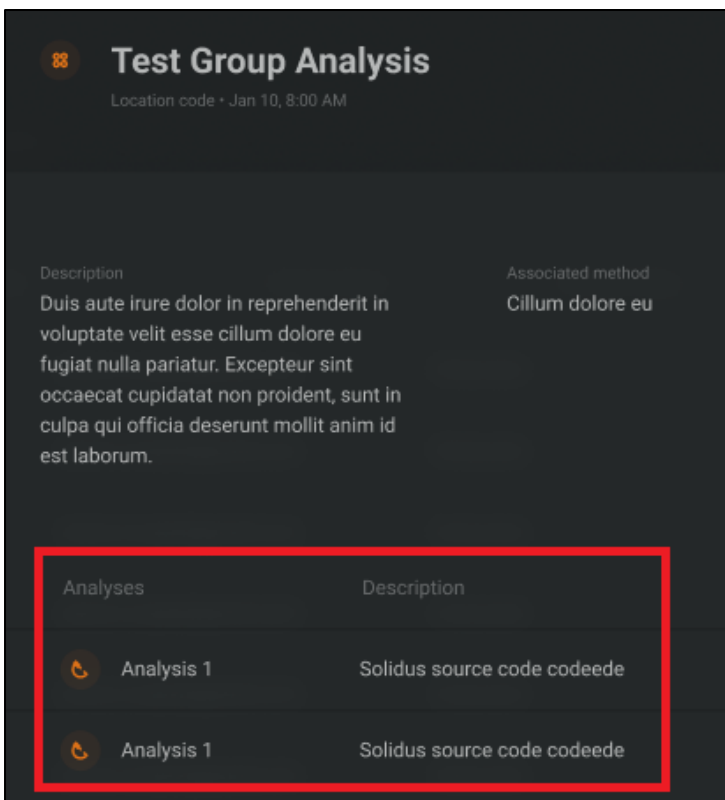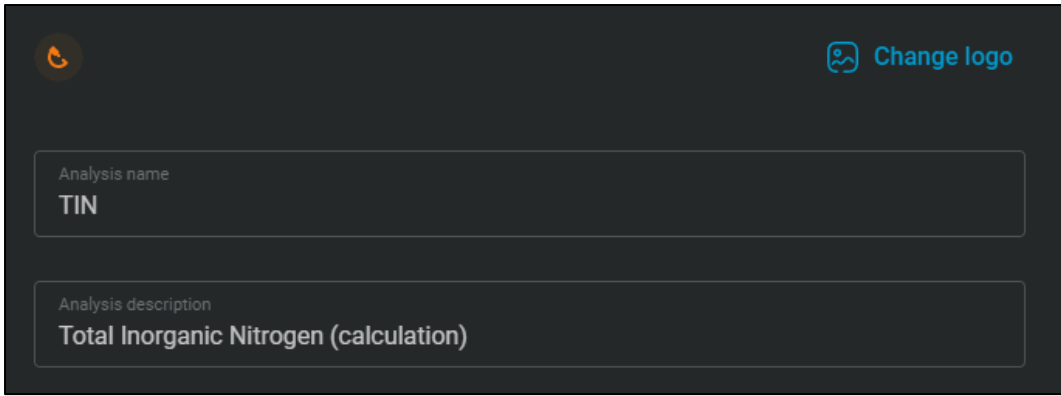

You can click on any analysis in this list to open the **Analysis Details** dialog for it.

Group analyses will not be displayed for orders creation as 1 item, users will be able to see all included in the group analyses and add/remove them one by one.

Analyses cannot be deactivated. Their availability depends on the catalog item status.

To edit the analysis, click the pencil icon and the dialog will be open in the edit mode. You can change the analysis logo, name, and the description.
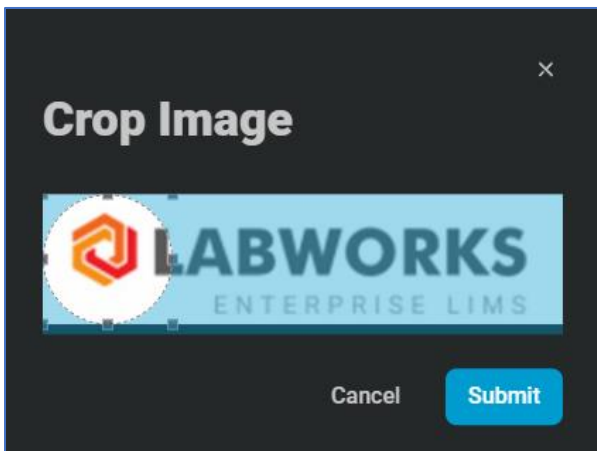
Click the **Change logo** button to specify the logo for this analysis. The **Change Logo** dialog will be open.
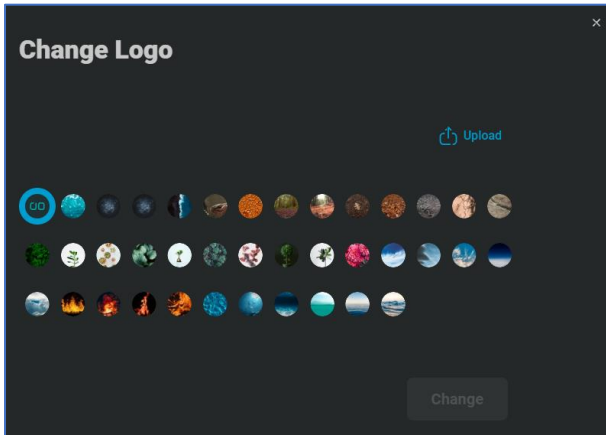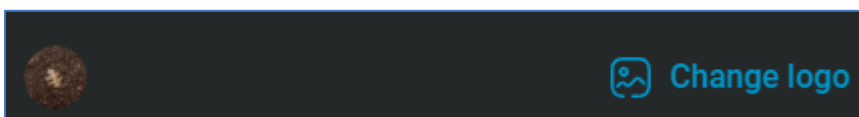

Select one of the predefined logos or click the **Upload button** to upload your picture. The **Crop Image** dialog will be open.

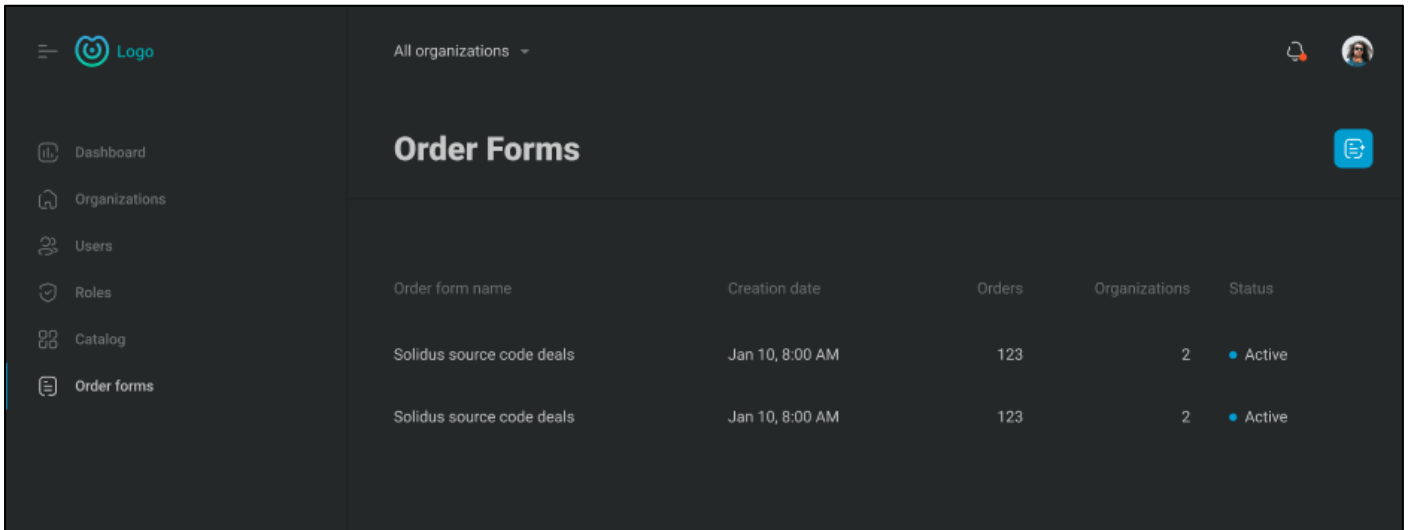Crop the picture and click the **Submit** button.

Once the logo is selected, click the **Change** button.

You can change the picture by clicking the **Change logo** button.

When all needed information is updated, click the **Save** button to apply changes to the analysis.

Order Form Management

The Order Form Management allows to work with order forms. Order forms are basis, templates that are used by consumers for order creation. They define which catalogs with samples and analyses can be used for an order, which additional fields are needed for an order or for samples, addresses settings. Order forms can be available for using by specific organizations or all organizations in the portal.

To view and edit order forms, the administrator should have the *Manage order forms* permission in at least 1 organization. In that case, all order forms are available.

Click the Order Forms button in the Left menu or on the Dashboard to open the **Order Forms List** screen.
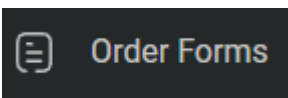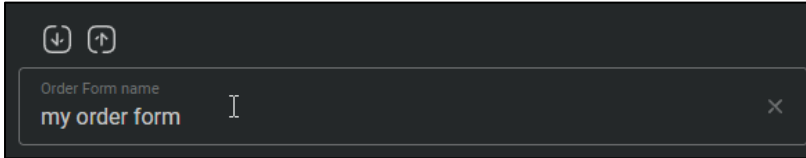

Order Forms List
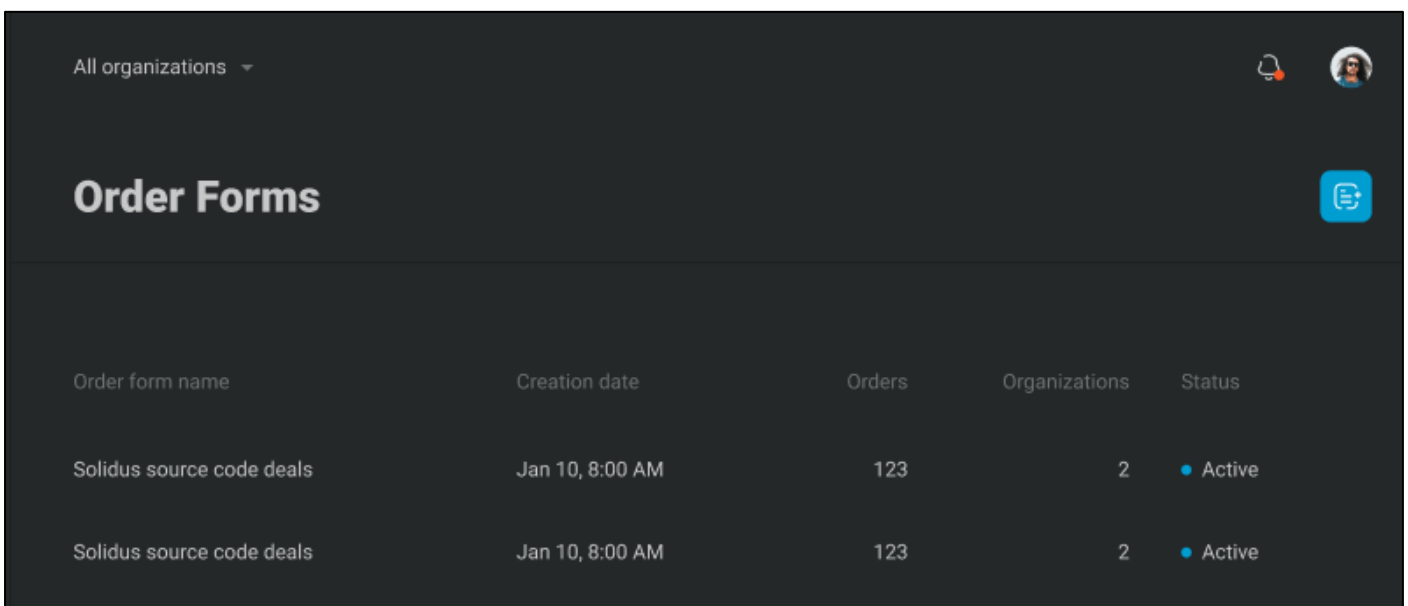
This page displays the list of all order forms in the portal that can be used for orders creation.

The table with roles contains the following columns:

- Order form name
- Creation date
- Orders – Number of orders that exist in the portal and are based on this order form.
- Organizations - Number of organizations that use this order form.
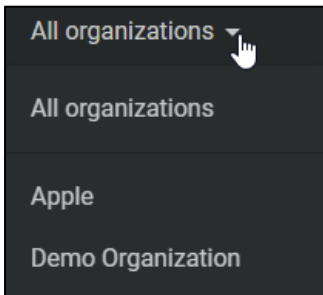- Status – Draft, Active or Inactive.

Use sorting and contextual filters to find needed items.

Use global filters to quickly find Active or Inactive order forms.
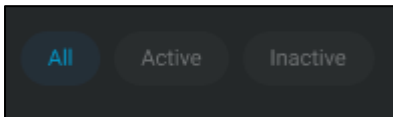
And order forms can be filtered by the organization as all items on other portal screens.
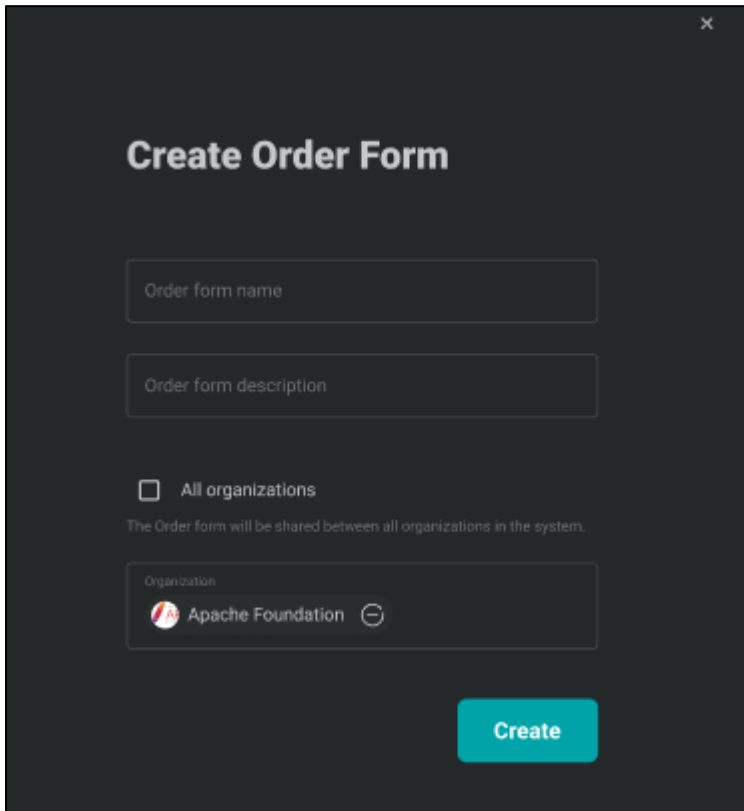

Click on the record to open the **Order Form Details** dialog.

All administrators with the *Manage order forms* permission in at least 1 organization can create new order forms. Click the **Create order form** button at the top-right corner of the page to open the **Create Order Form** dialog.
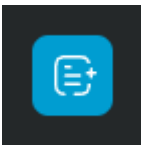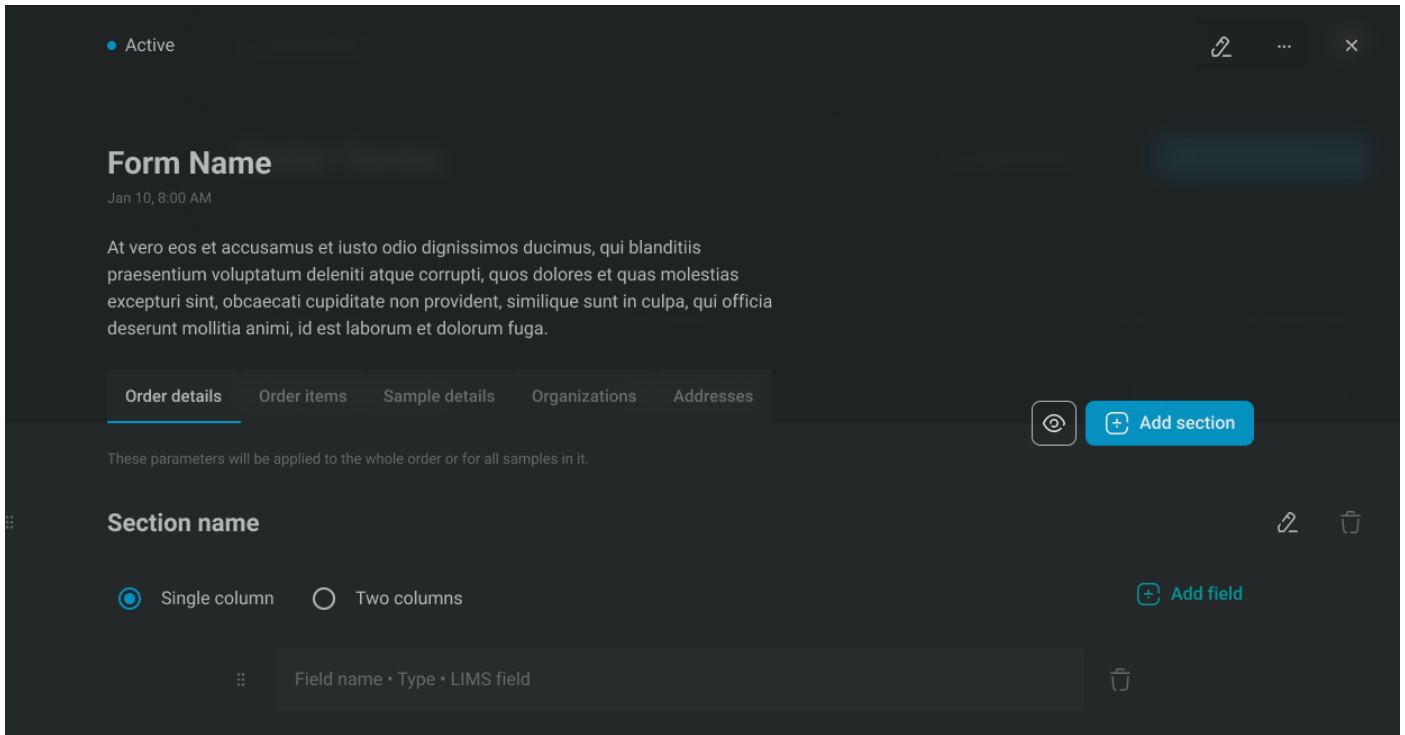
Create Order Form

On this dialog, you can specify the name of a new item, description, and organizations that can use this order form.

Check the **All organizations** checkbox to give access to this order form for all organizations in the portal or specify organizations one by one in the **Organization** drop-down. You can select one or several active organizations in which you have the *Manage order forms* permission. Only global administrators can share order forms with all organizations.

Click the **Create** button to add the new order form.

Please note that it will have the Draft status, so you should fill it in, add catalogs, specify details if needed and activate the order form so that is becomes available for consumers.
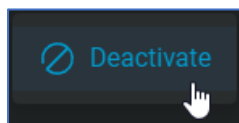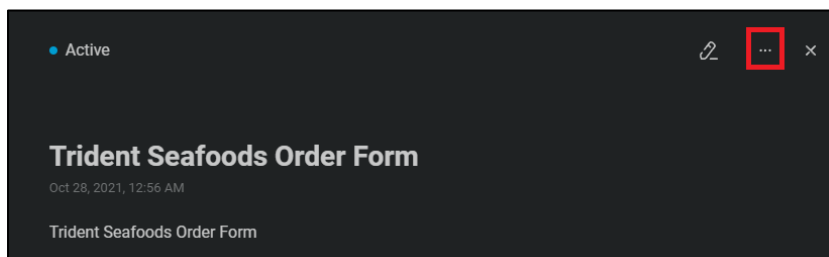
Order Form Details

This screen can be open by clicking the order form row on the **Order Forms List** screen or when a new order form is created.

At the top of the screen, you can see the general order form information: its name, description, creation date, status.

Click on the "…"icon to open the menu. Select Activate or Deactivate menu options to change the order form status.

Order forms with inactive status cannot be used for creation of new orders. It will not affect existing orders based on this order form.

To edit the order form name and description, click the **pencil** icon at the right-top corner of the screen.
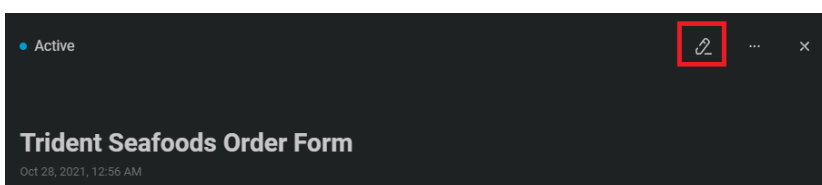
The **Edit Order Form** dialog will be open.

Click the **Save** button to apply changes.

The Order Form Details dialog is divided into several tabs.

Order Details tab

On the **Order Details tab**, the list of additional order fields can be customized.

These fields will be displayed on the second step of the **Create Order Wizard**, on the **Order Details screen – Order Details tab**. Consumers can fill these fields and the entered values will be pushed to LIMS sample parameters if these fields are mapped with LIMS fields. You can ask any additional information from consumers here if it is needed for orders based on this order form.

Fields can be divided into several sections and they can be displayed in 2 columns to make it look better on consumer screens of the portal.

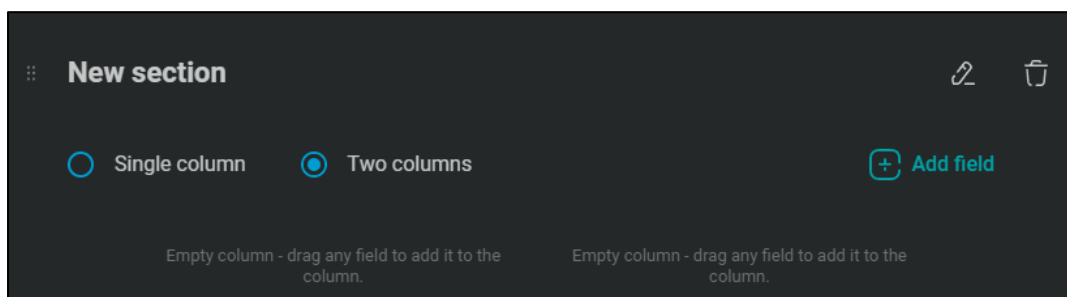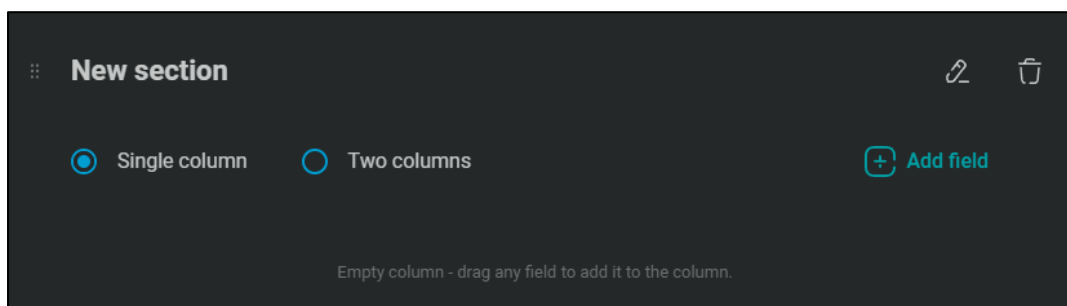Click the **Add section** button to add a new section.
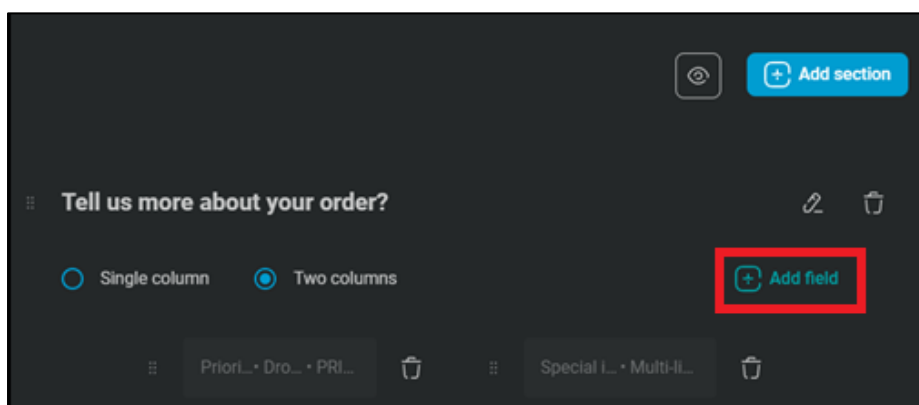
The **Configure Section** dialog will be open.
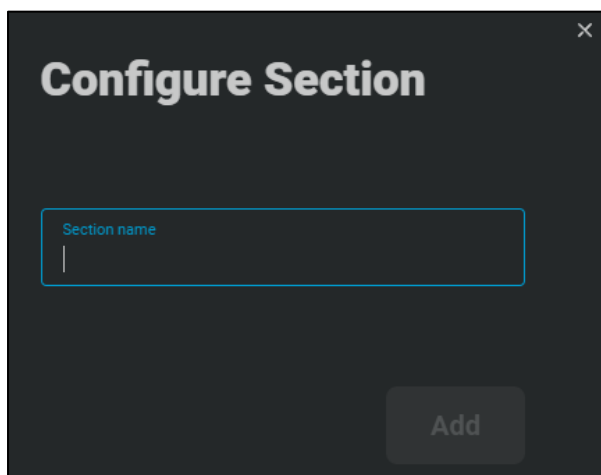
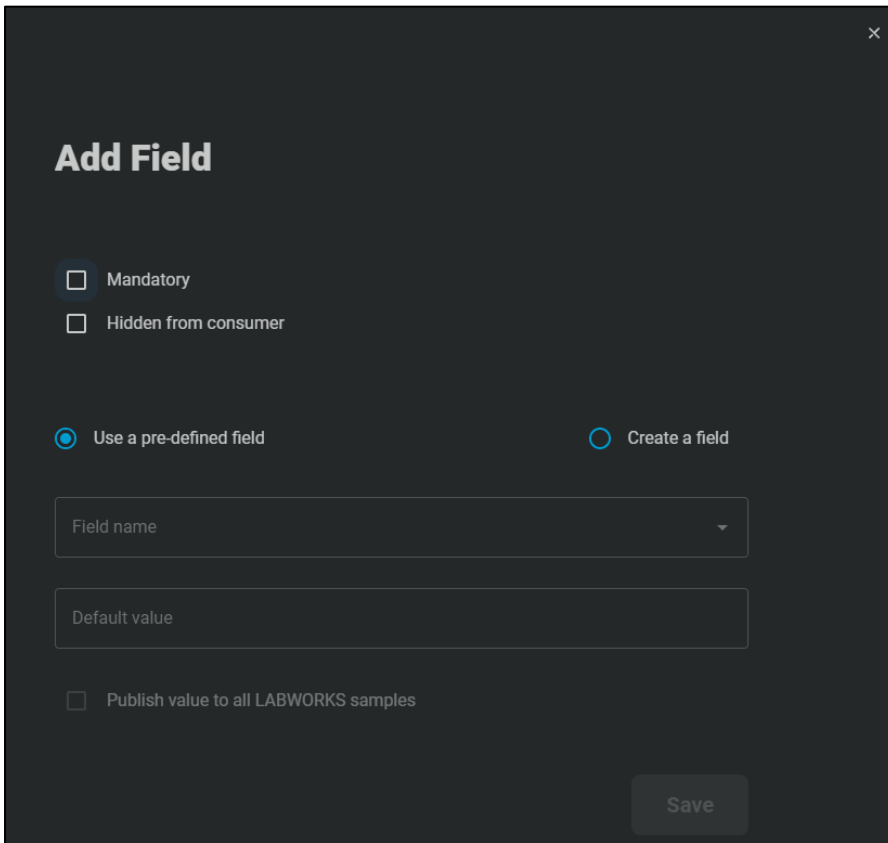Enter the section name and click the **Add** button.

When a new section is added, it is displayed on the screen. The section can contain one or two columns.

Select one of the radio buttons to configure how your fields will look for consumers during orders creation or editing.

Once the section is added, you can add fields to it. Click the **Add field** button for this section.
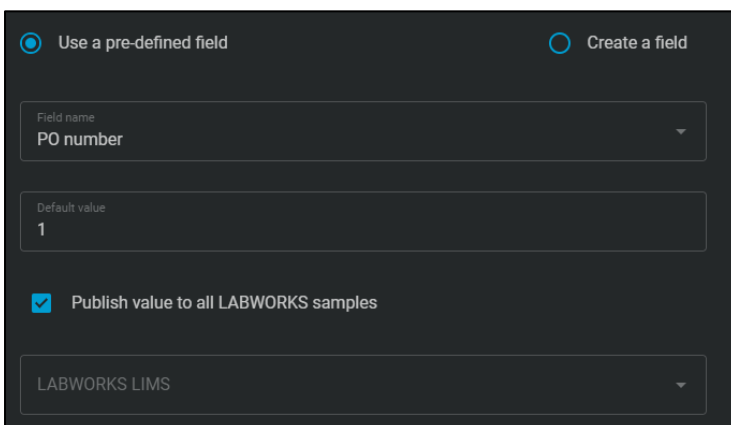
The **Add Field** dialog will be open.

On this dialog, you can specify all parameters for this field:

- If it should be mandatory (users should fill this field) or optional (users can leave this field empty).
- If it should be hidden or not.
    - Hidden fields will not be displayed during the order creation.
    - You can use hidden fields e.g., to push default values to LIMS if needed.
    - Only global administrators and users with the *View hidden fields* permission will be able to see such fields on the **Order Details** dialog.
- Configure if this field should be one of existing predefined fields or custom one.
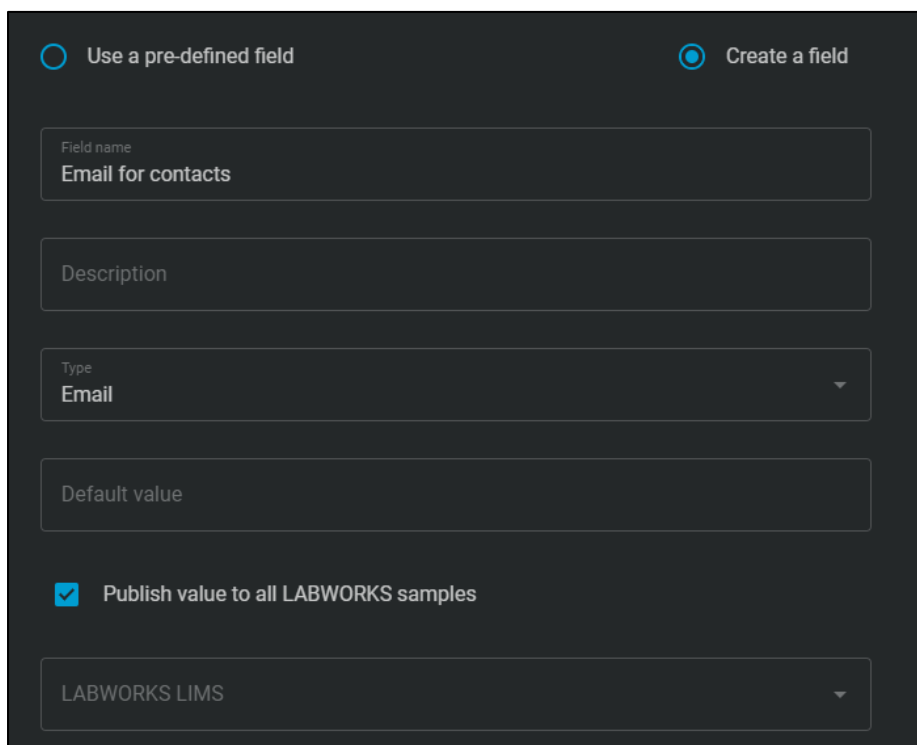
If the field is predefined, select one of the fields in the Field name drop-down.

Set the default value if needed. Check the **Publish value to all LABWORKS samples** checkbox if you want LIMS to receive values of this field as values for sample user-defined fields. When the checkbox is checked, select one of existing LIMS sample user-defined fields to map LIMS and Exchange Portal fields with each other. In that case, values specified by the order creator for this field will be transferred to the laboratory with the ordered samples. It works for all samples in the order. If the location code contains
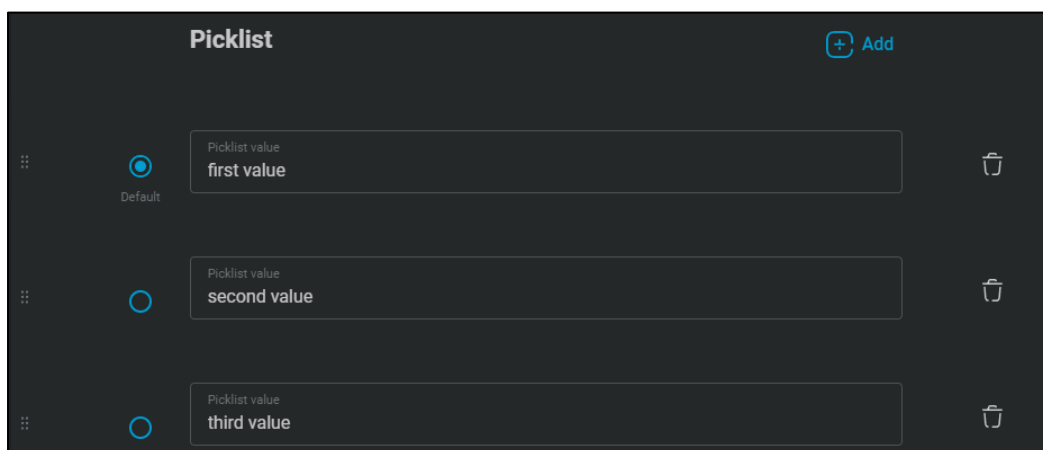
default values of these fields, the values from the Exchange Portal have the higher priority and they will over-write location code defaults.

If you want to create your custom field, select the **Create a field** radio button.


Specify the name of a new field, its description, select one of available formats and specify the default value if needed. The following formats are available: checkbox, date, decimal, drop-down, email, integer, multi-line text, phone number, text, and URL. Check the **Publish value to all LABWORKS samples** checkbox if you want LIMS to receive values of this field as values for a sample user-defined field. When the checkbox is checked, select one of existing LIMS sample user-defined fields with the same format to map LIMS and Exchange Portal fields with each other. In that case, values specified by the order creator for this field will be transferred to the laboratory with the ordered samples. It works for all samples in the order.

If you selected the drop-down as the format for the new field, you will see the **Picklist** section.
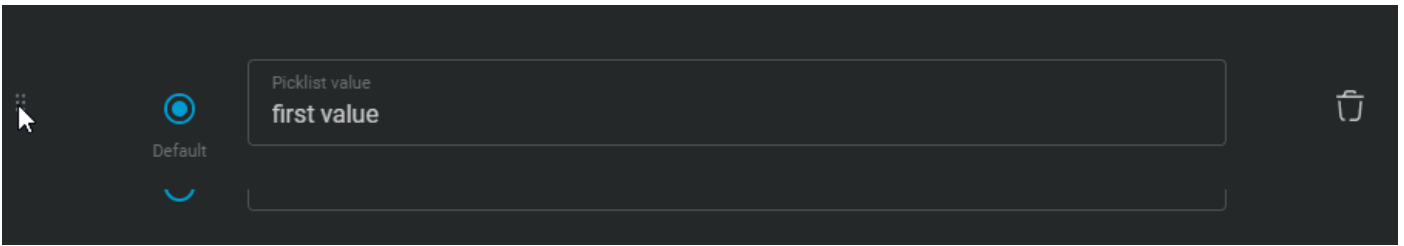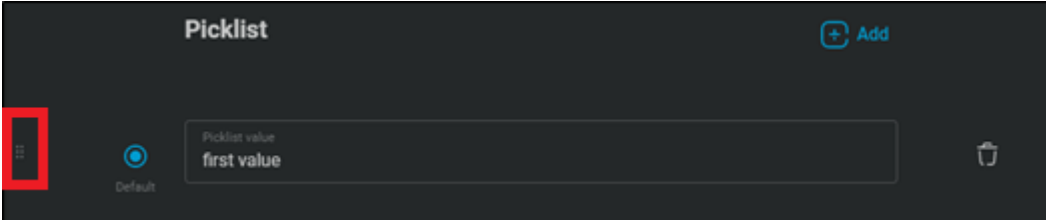

You can add options for your drop-down available for selection by consumers.
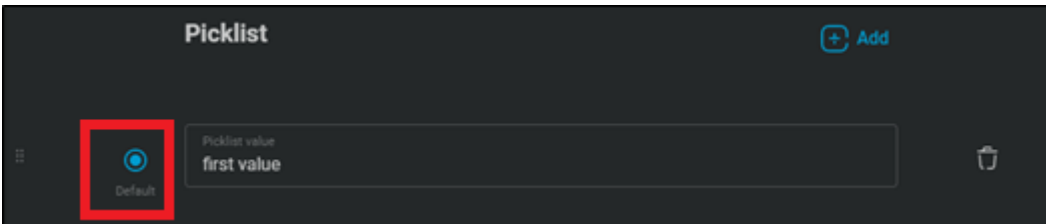
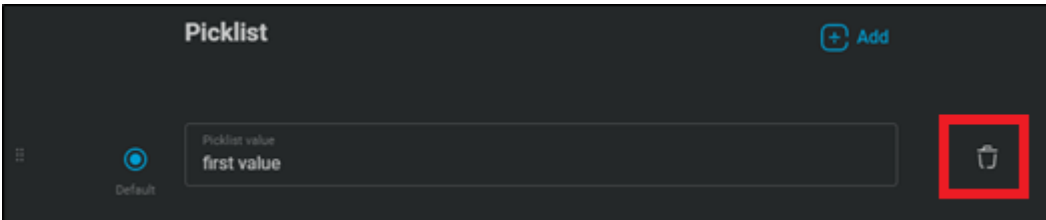Click the **Add** button to add a new option.
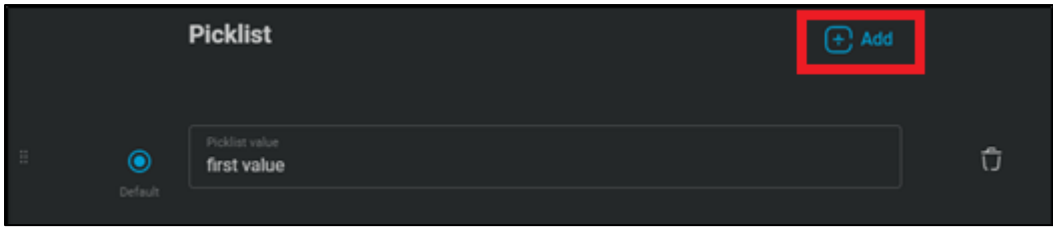
Use drag-n-drop to change places of options.



Select one of the options as default.

Click the **trash** icon to remove an option.

Please note that LIMS fields should have the same format as Exchange Portal fields (e.g., date).
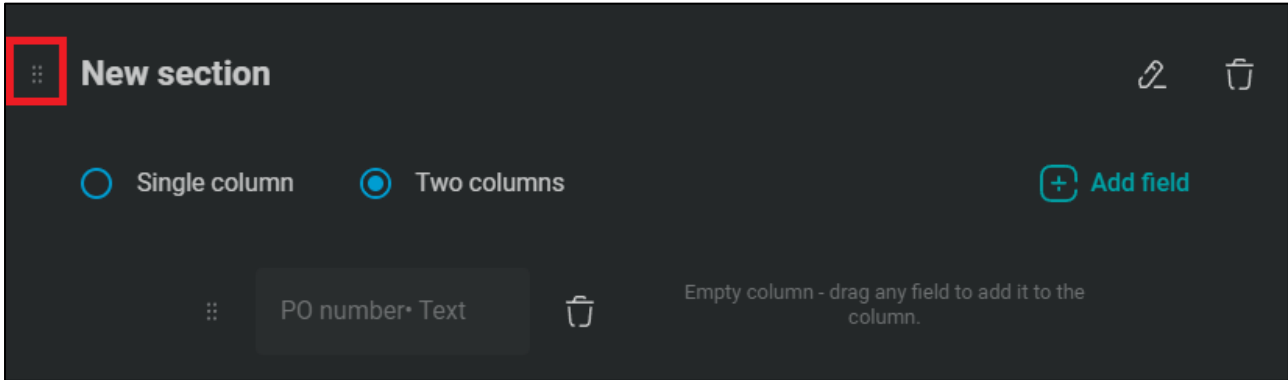
When the field information is specified, click the **Add** button to add the field to the section.

The field will be added to the first column if there are 2 columns in the section. You can use drag-n-drop to move fields, even between columns, but in bounds of one section.
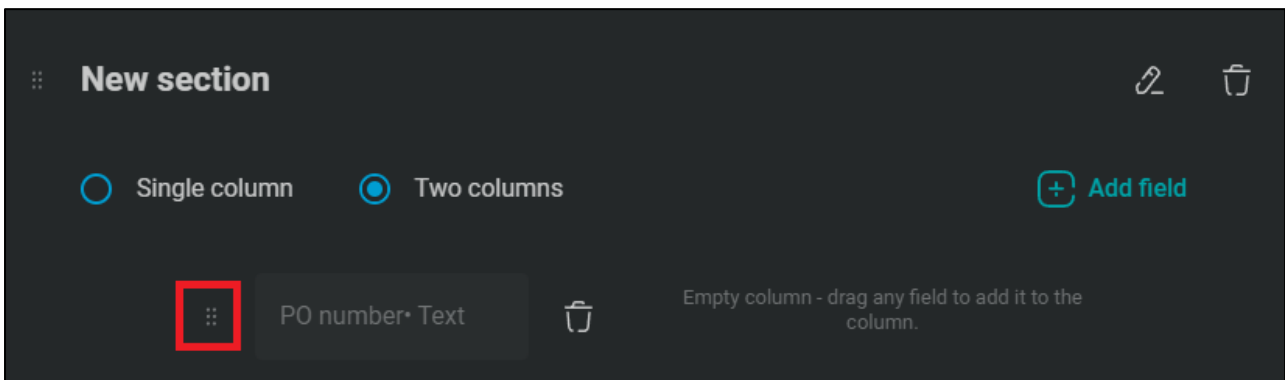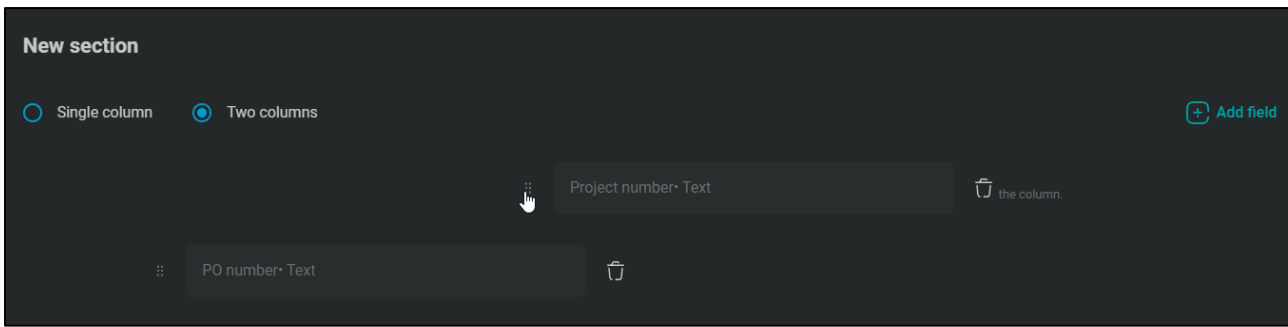
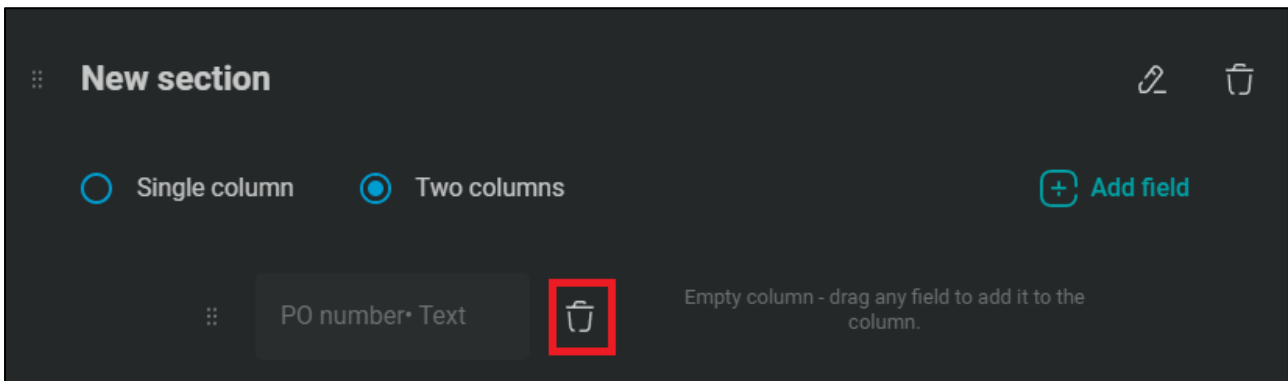You also can use drag-n-drop to move sections.

You can see details of every field: the field name, whether it is hidden, whether it is mandatory (marked with *), LIMS field name (if the field should be pushed to LIMS).
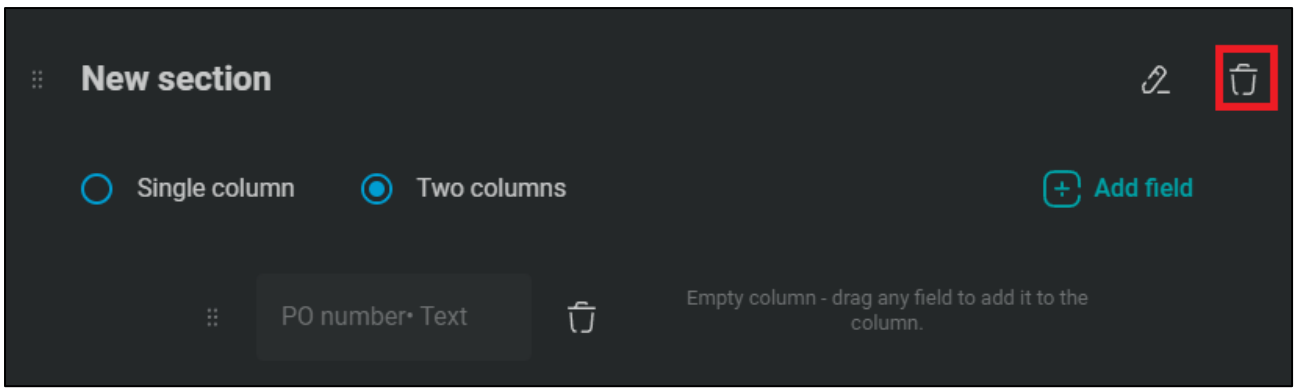
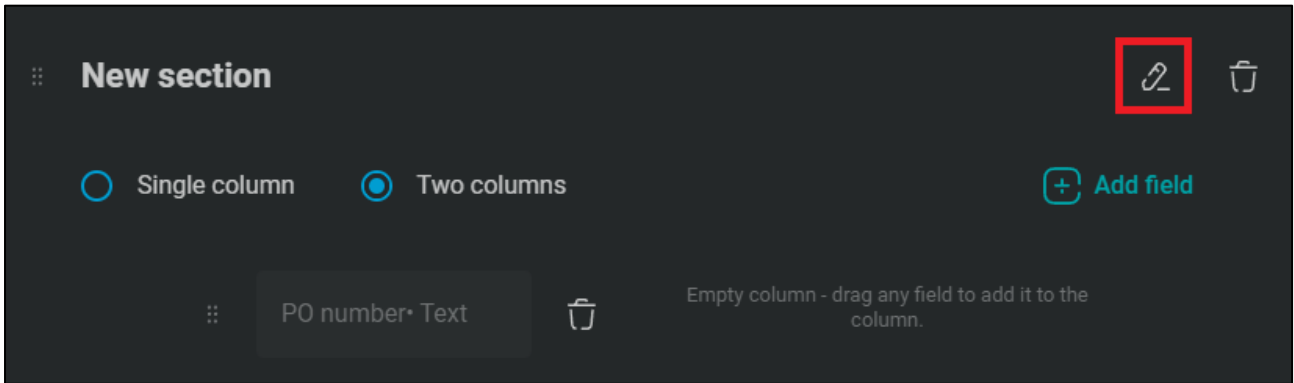Hover the mouse over the field to see the detailed information.
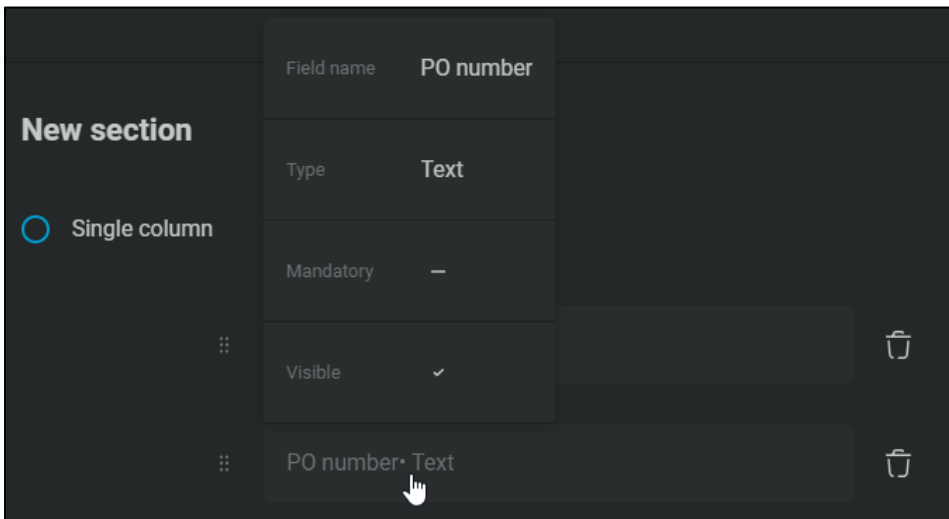
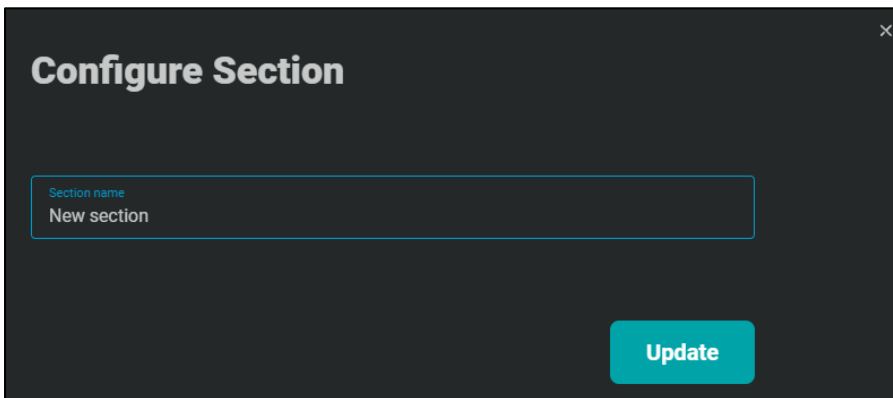To remove any field from the section, click the **trash** icon for this field.

To remove the entire section, click the **trash** icon for the section.

To edit the section name, click the pencil icon.
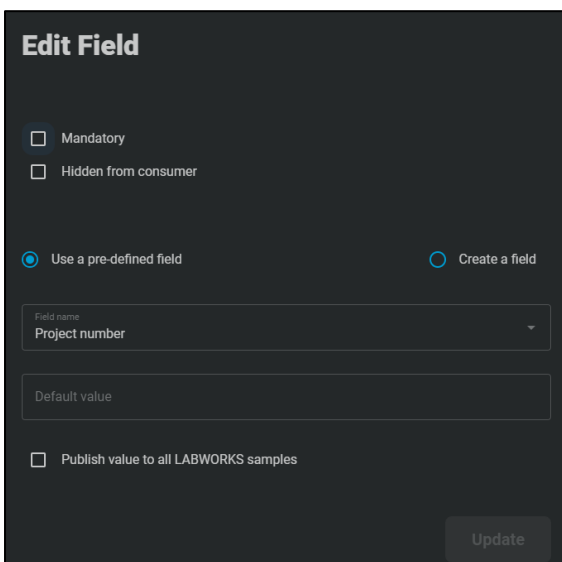

The **Configure Section** dialog will be open.

Click the **Update** button to apply changes.

To edit a field, just click on it. The **Edit Field** dialog will be open. See details about the **Add Field** dialog on what can be done here.
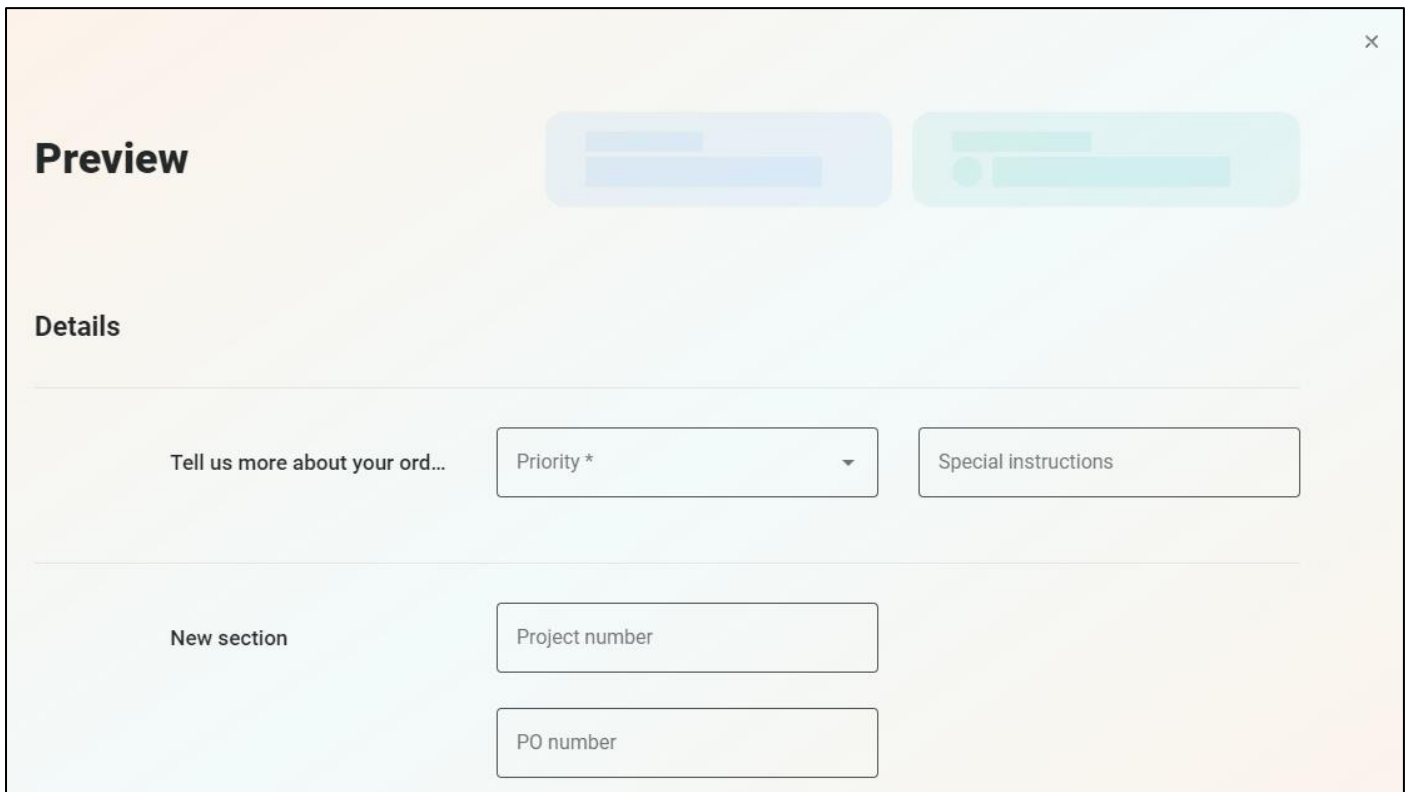
Click the **Update** button to apply changes.

When all sections and fields are configured, you can view and check how the second step of the **Create Order Wizard** will look. Click the **Preview** button.
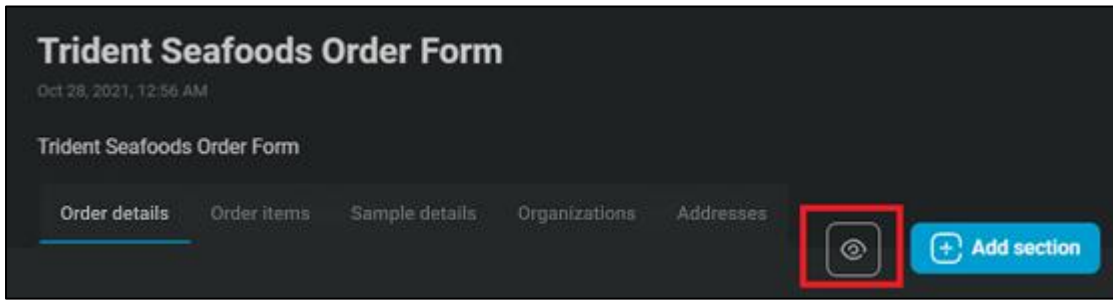
The **Preview** dialog will be open.

You can see here all sections and fields that are added to the order form.

Ordered Items tab

On the **Ordered Items** tab, the list of catalogs that are used by this order form is displayed.

Click on the catalog row to expand or collapse items in it.

When the catalog is expanded, the list of its catalog items is displayed. These samples can be added to orders based on this order form.

The following columns are shown:

- Catalog item name (customized for this catalog)
- Catalog item description (customized for this catalog)
- Location code name (from LIMS)
- Default toggle – Specifies whether this catalog item should be added to new orders by default.
- Analyses – Number of analyses in this catalog item

Inactive catalogs and catalog items are marked with red circles near their logos. Please note that inactive catalog items, items of inactive catalogs, and items without analyses cannot be ordered. Consumers will not see them on the **Create Order Wizard**, even if these items are marked as default.

To make catalog items available for ordering, edit this catalog and its samples on the **Catalog Management** pages. See details in corresponding sections of this document.

Click the **Add catalog** button to add new catalogs to the order form.

The **Add Catalog** dialog will be open.
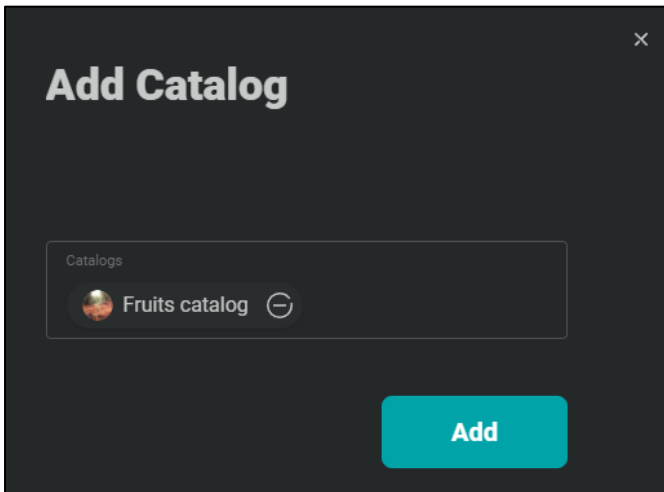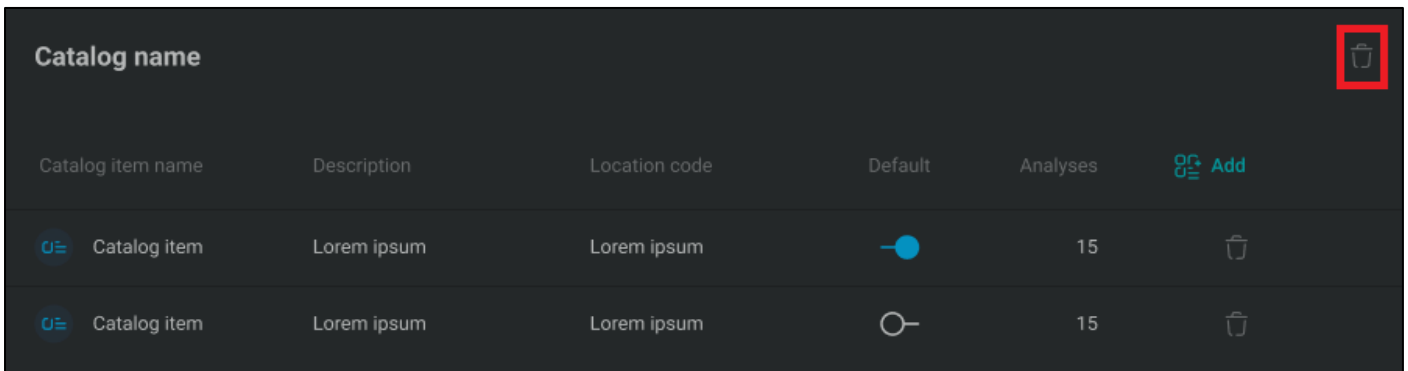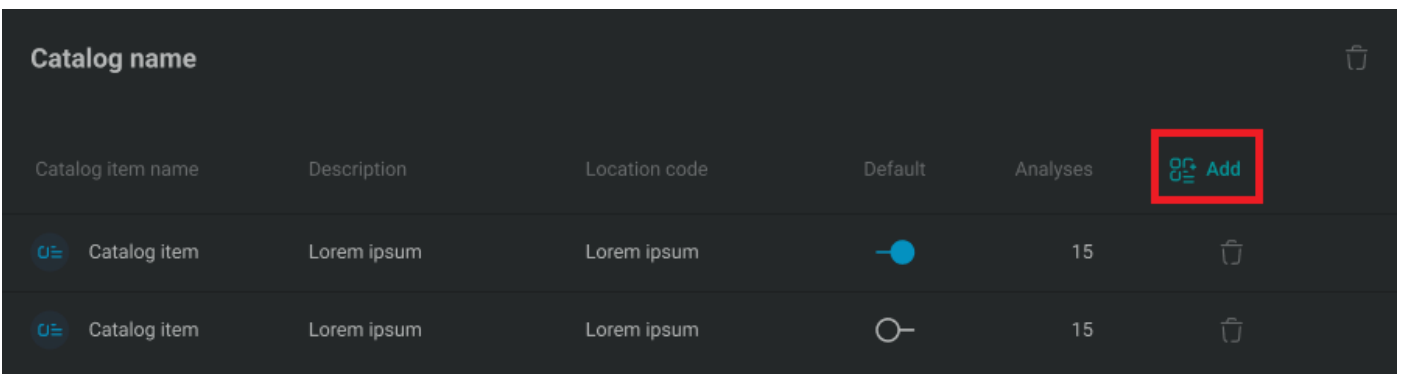

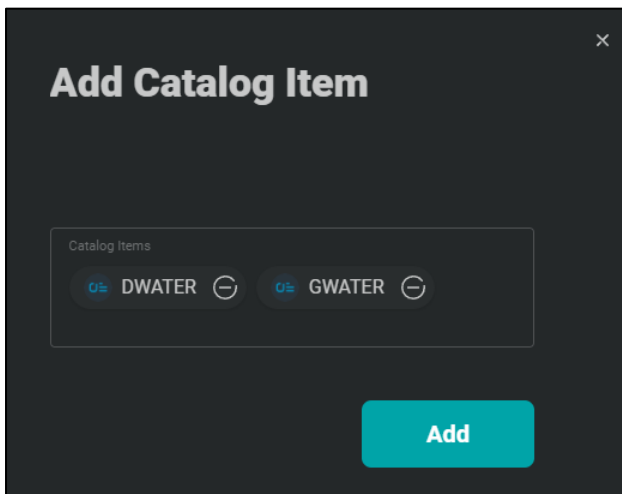Select one or several catalogs and click the **Add** button.

To remove a catalog from the order form, click the **trash** icon for this item.

To add more samples to the catalog, click the **Add** button for specific catalog.

The **Add Catalog Item** dialog will be open.

Select one or several catalog items and click the **Add** button. On this screen, you can see the list of all not included in the order form catalog items available for this catalog.
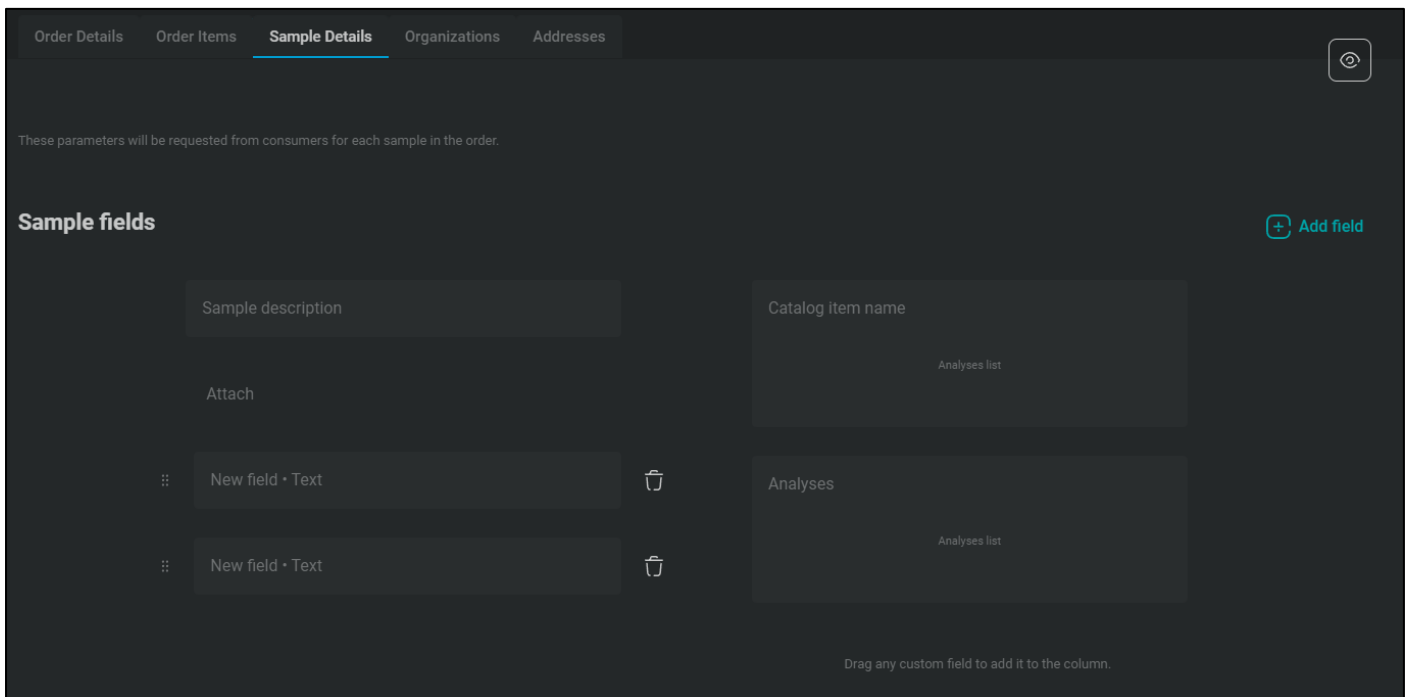
To remove catalog items from the catalog, click the **trash** icon for specific sample.

Switch the **Default** toggle to add the catalog item to new orders by default. They will be displayed as added to the order when an order creator opens the **Create Order Wizard**.
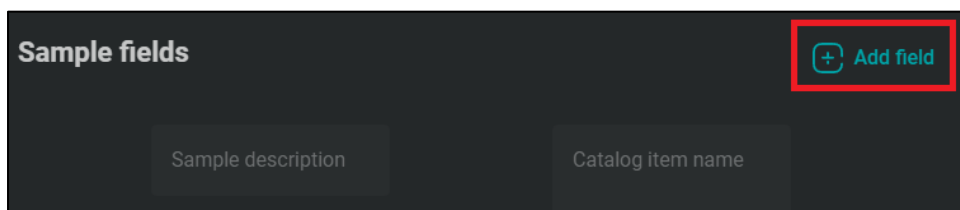
Sample Details tab

While on the Order Details tab, you can configure fields related to the order itself or relevant for all samples, on the Sample Details tab, you can customize additional fields for each sample. It means that these fields will be displayed for every sample in an order and entered by consumers values can differ from sample to sample.

These fields will be displayed on the first step of the **Create Order Wizard**, on the **Order Details screen – Ordered Items tab, Results tab**. Consumers can fill these fields and entered values will be pushed to LIMS sample parameters if these fields are mapped with LIMS fields. You can ask any additional information from consumers here if it is needed for samples.
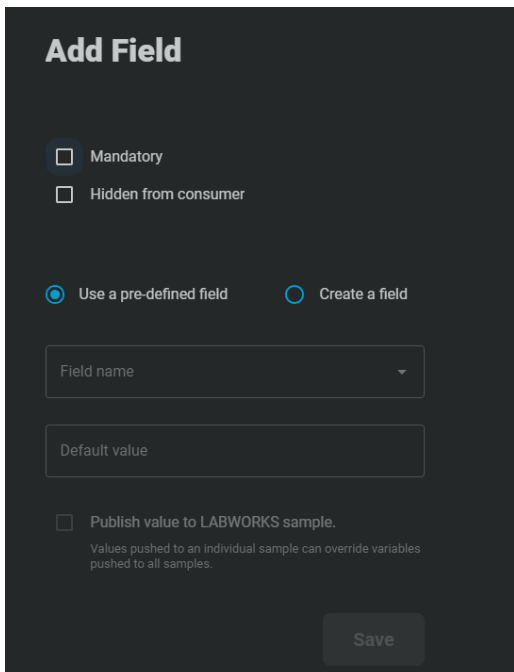
On this tab, you can see what the first step of the **Create Order Wizard** will look like: a description of the sample and attachments on the left side and the name of the catalog item, a list of predefined analyses and a list of custom analyses on the right side. You can assume how long these parts will be and position sample fields to the left or right depending on this. But note that sample fields will also be displayed in these 2 columns on the **Order Details** screen.
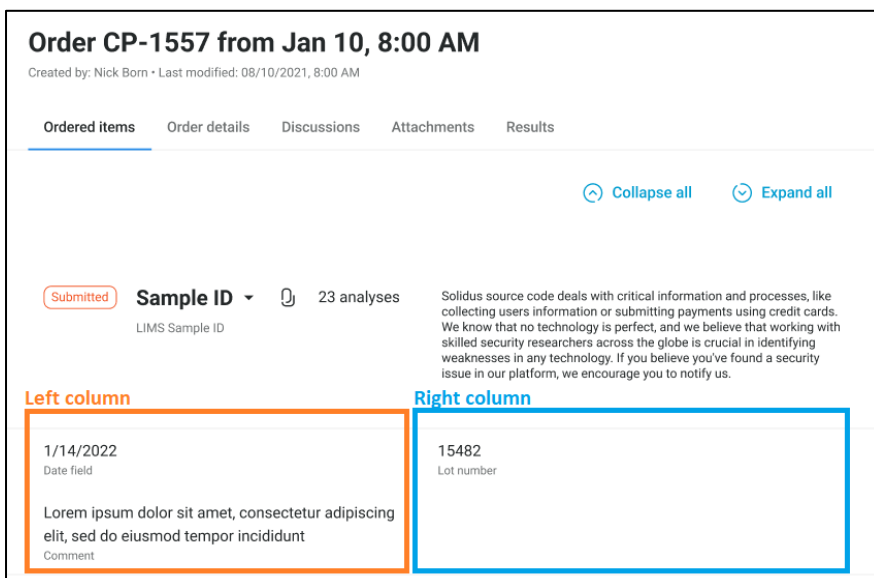
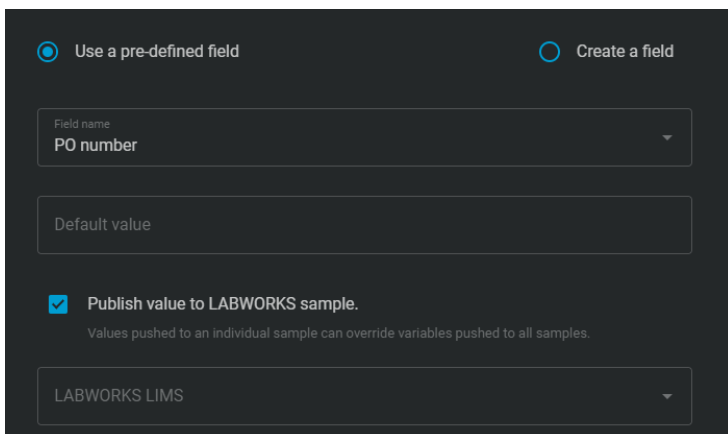To add a new field, click the **Add field** button.

The **Add Field** dialog will be open.

On this dialog, you can specify all parameters for this field:

- If it should be mandatory (users should fill this field) or optional (users can leave this field empty).
- If it should be hidden or not.
  - Hidden fields will not be displayed during the order creation.
  - You can use hidden fields e.g., to push default values to LIMS if needed.
  - Only global administrators and users with the *View hidden fields* permission will be able to see such fields on the **Order Details** dialog.
- Configure if this field should be one of existing predefined fields or custom one.

If the field is predefined, select one of the fields in the Field name drop-down.

Set the default value if needed. Check the **Publish value to LABWORKS sample** checkbox if you want LIMS to receive values of this field as values for sample user-defined fields. When the checkbox is

checked, select one of existing LIMS sample user-defined fields to map LIMS and Exchange Portal fields with each other. In that case, values specified by the order creator for this field will be transferred to the laboratory with the ordered sample. This works for each sample separately. Note that values pushed to an individual sample can override variables pushed to all samples, so do not map order fields and sample fields with the same LIMS field.

If you want to create your custom field, select the **Create a field** radio button.

Specify the name of a new field, its description, select one of available formats and specify the default value if needed. The following formats are available: checkbox, date, decimal, drop-down, email, integer, multi-line text, phone number, text, and URL. Check the **Publish value to LABWORKS sample** checkbox if you want LIMS to receive values of this field as values for a sample user-defined field. When the checkbox is checked, select one of existing LIMS sample user-defined fields with the same format to map LIMS and Exchange Portal fields with each other. In that case, values specified by the order creator for this field of this sample will be transferred to the laboratory. This works for each sample separately. So, consumers can input different values for different samples in an order.

If you selected the drop-down as the format for the new field, you will see the **Picklist** section.
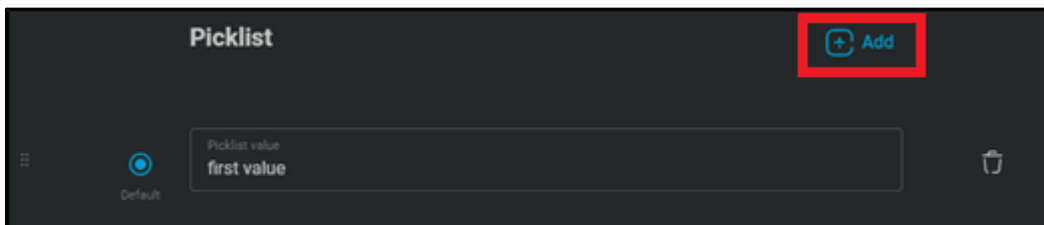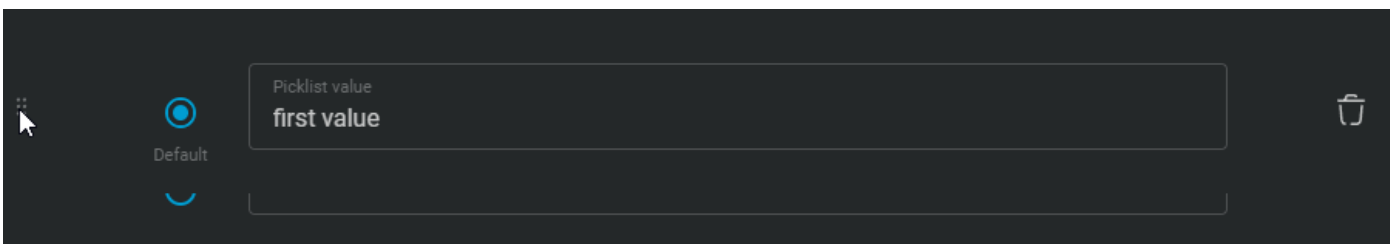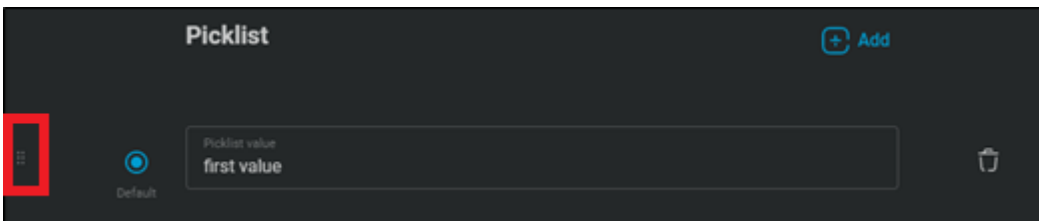

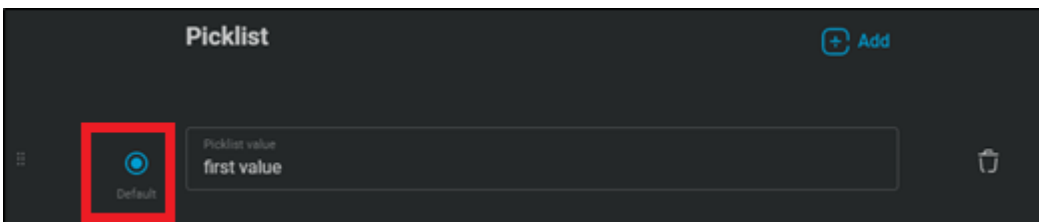You can add options for your drop-down available for selection by consumers.

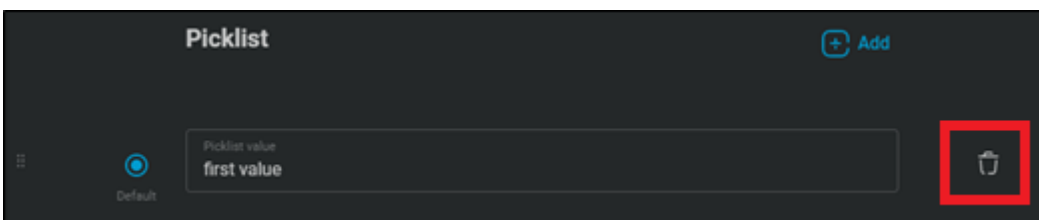Click the **Add** button to add a new option.

Use drag-n-drop to change places of options.

Select one of the options as default.

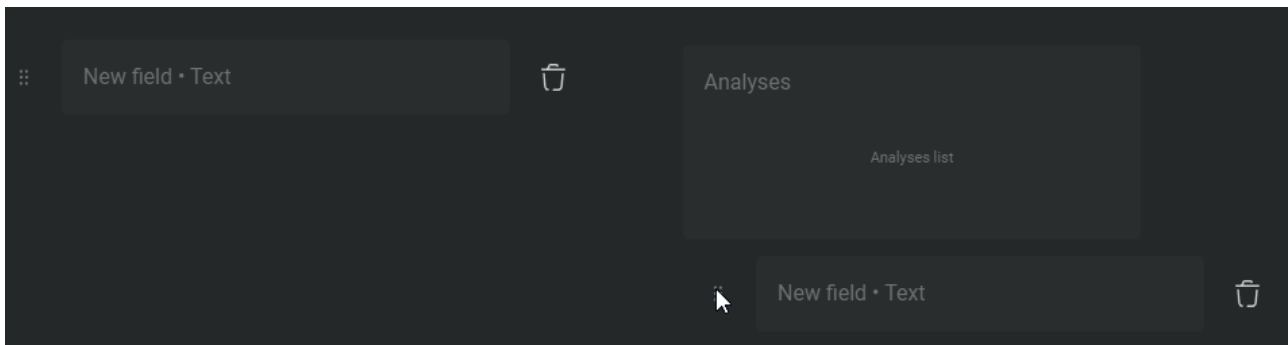Click the **trash** icon to remove an option.

Please note that LIMS fields should have the same format as Exchange Portal fields (e.g., date).

When the field information is specified, click the **Add** button to add the field to the order form.
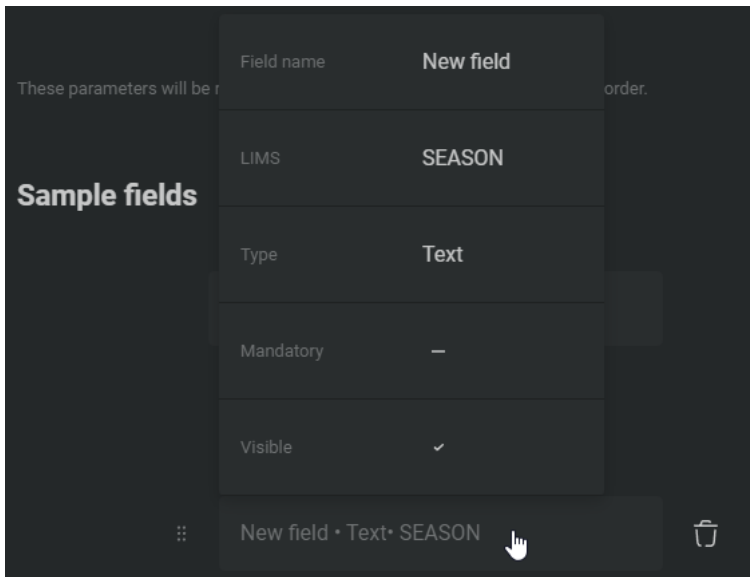
The field will be added to the first column below attachments. You can use drag-n-drop to move fields up and down and between columns.
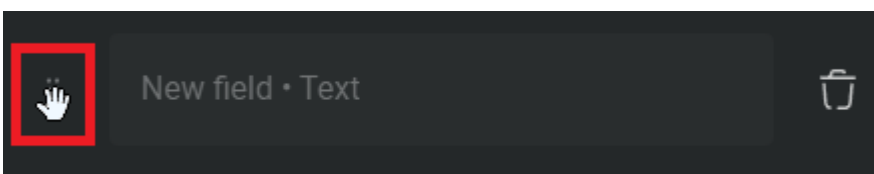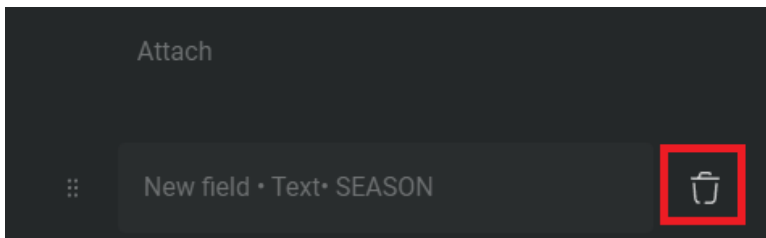
You can see details of every field: the field name, whether it is hidden, whether it is mandatory (marked with *), LIMS field name (if the field should be pushed to LIMS).

Hover the mouse over the field to see the detailed information.

To remove any field from the order, click the **trash** icon for this field.

To edit a field, just click on it. The **Edit Field** dialog will be open. See details about the **Add Field** dialog on what can be done here.

Click the **Update** button to apply changes.

When all fields are configured, you can view and check how the first step of the **Create Order Wizard** will look. Click the **Preview** button.
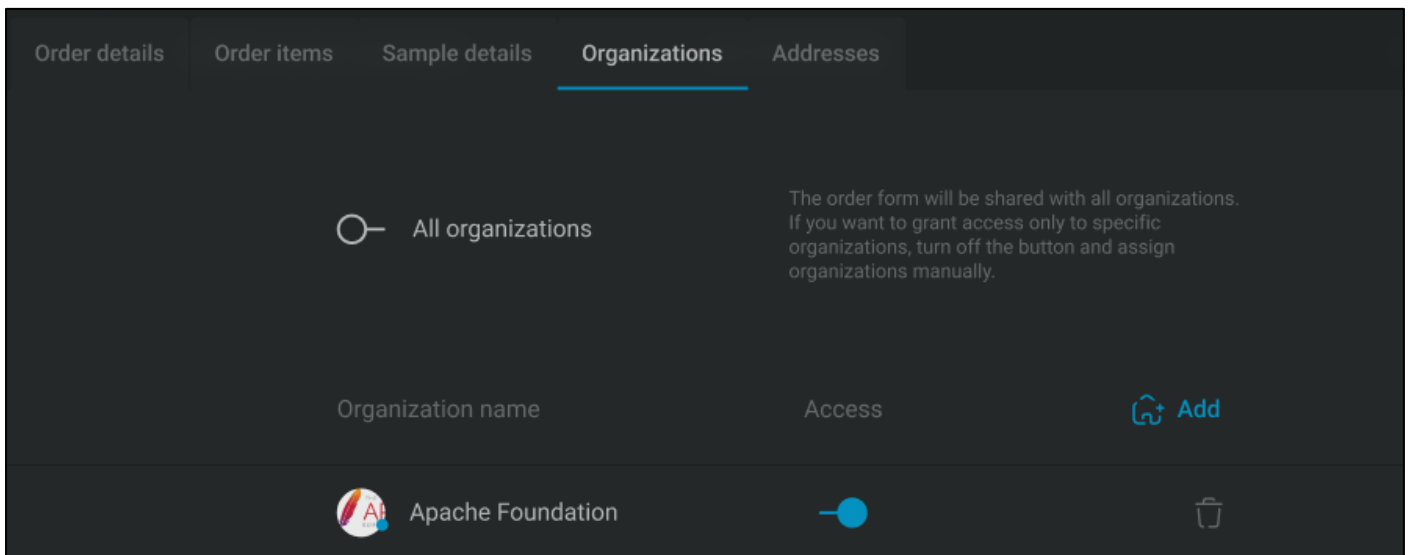

The **Order Items** page will be open.

Here you can see all the fields that have been added to the order form and how they will look on the screen next to other parameters.
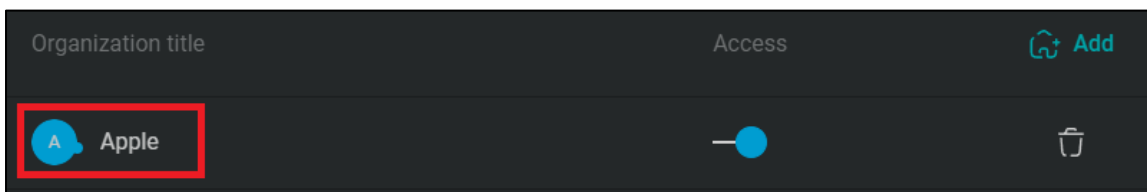
Organizations tab

On the **Organizations tab** of the **Order Form Details**, the list of organizations that can use this order form is displayed.

To make the order form available for all organizations, turn on the **All organizations** toggle. If you want to grant access only to specific organizations, turn off the button and assign organizations for this order form manually. Only global administrators can share order forms with all organizations.

On the Organizations tab, global administrators will see all organizations associated with this order form. Other administrators will see organizations associated with this order form for which this user has the *Manage order form* permission.

You can see the organization name and the status of the access of this organization to the open order form. Active organizations are marked with the blue circle, inactive organizations have the red circle near their logos.

To open the details of the organization (if you have the *View organization details* permission in this organization), click on its name. The **Organization Details** dialog will be open. See more information in the Organization Details section of this document.

To change the access status for this order form in a specific organization, you need to be a global admin or have the *Manage order form* permission in this organization.
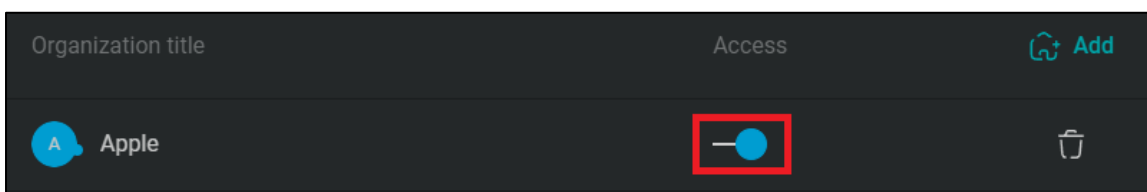
Click the button to switch its value. Consumers will not be able to create orders for this organization based on this order form if the access is turned off.

Click the **trash** icon to remove the association between this order form and the organization.

If the association between an order form and an organization is removed, this order form cannot be used for orders creation for this organization.

To give the access to the order form for a new organization, click the **Add** button. You need to be a global administrator or have the *Manage order form* permission in at least 1 organization to perform this operation.

The **Add Organization** dialog will be open.

On this dialog, you can select one or several active organizations which you manage with the *Manage order form* permission and which are not assigned to the order form.

Click the **Add** button to associate the order form with the selected organizations.

Addresses tab

On this tab, administrators can configure receiving addresses from the order creator: report address, invoice address, CC addresses. This data will be sent to the laboratory along with other order data.

First, you can specify whether to request addresses from consumers.

If the address is not requested, users will not see the section with this address (e.g., the Report address section), and the organization's default address (if any) will be applied to the order and sent to the laboratory.

If an address is requested, users will be able to select one of the addresses configured for the organization by administrators on the **Organization Details – Addresses tab**.

Select Report Address

Street	Red st.
City	Chicago
State	Illinois
ZIP	4038234
Country	USA
Email	email@email.com

Street	Street 1
City	VA
State	NY
ZIP	123456
Country	USA
Email	mark@email.com

Apply

Or you can let them add their custom addresses. In this case, users will be able to add their own address and fill it with the data of their choice. Or also choose one of the addresses of the organization. This information will be sent to the laboratory along with the order.

Custom address

Street

City

State

ZIP

Country

Email

If you have the appropriate permissions, please check which addresses are currently set for your organization and can be selected by consumers.