



LABWORKS Exchange Portal

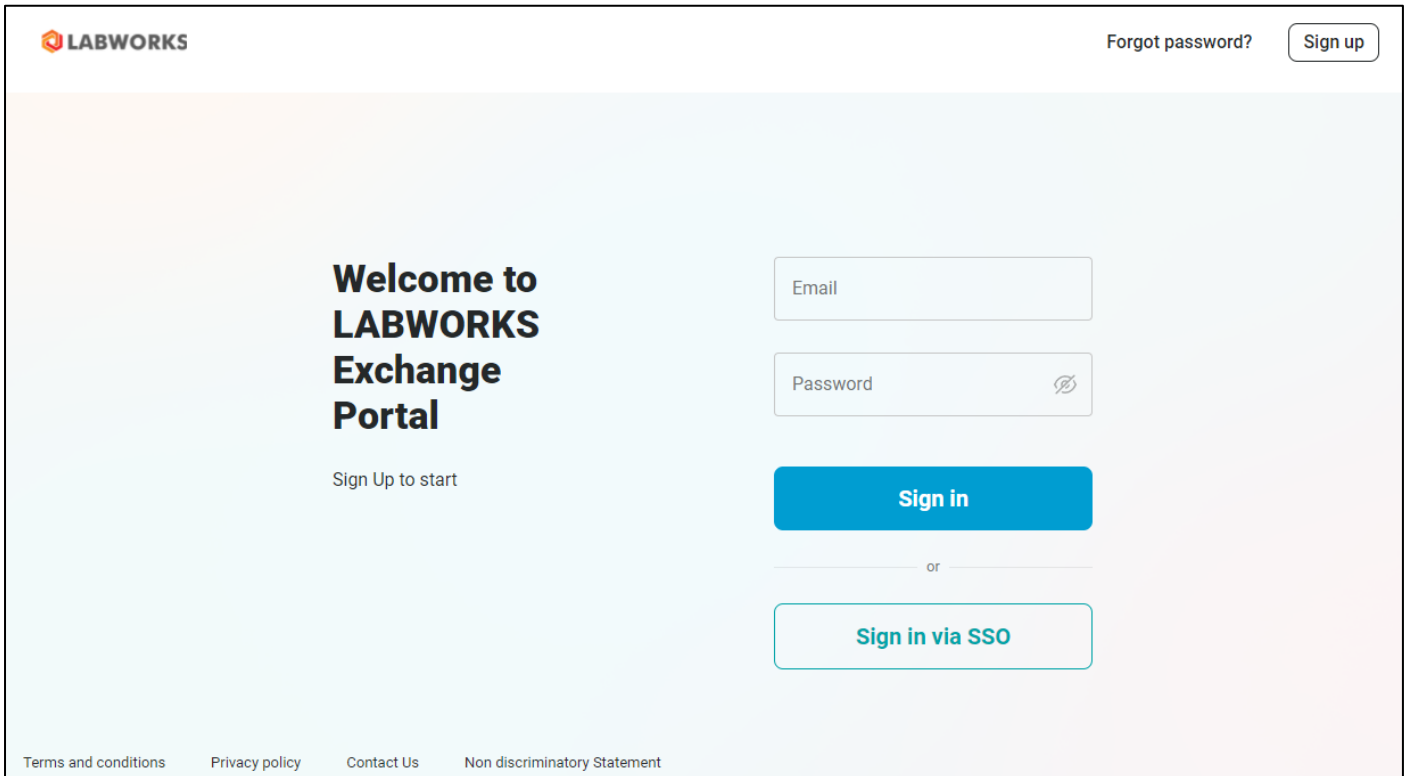
User's Guide

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About the Exchange Portal



The screenshot shows the LABWORKS Exchange Portal login page. At the top left is the LABWORKS logo. At the top right are links for "Forgot password?" and "Sign up". The main content area features the heading "Welcome to LABWORKS Exchange Portal" and a sub-heading "Sign Up to start". To the right of the heading are two input fields: "Email" and "Password" (with a visibility toggle icon). Below these is a blue "Sign in" button. Underneath the button is a horizontal line with the word "or" in the center, followed by a "Sign in via SSO" button. At the bottom of the page, there are four links: "Terms and conditions", "Privacy policy", "Contact Us", and "Non discriminatory Statement".

LABWORKS Exchange Portal is a web application that is intended to order samples with analyses from the laboratory.

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 Consumer part of the portal.

Please note that names for some properties can be customized by administrators. 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.

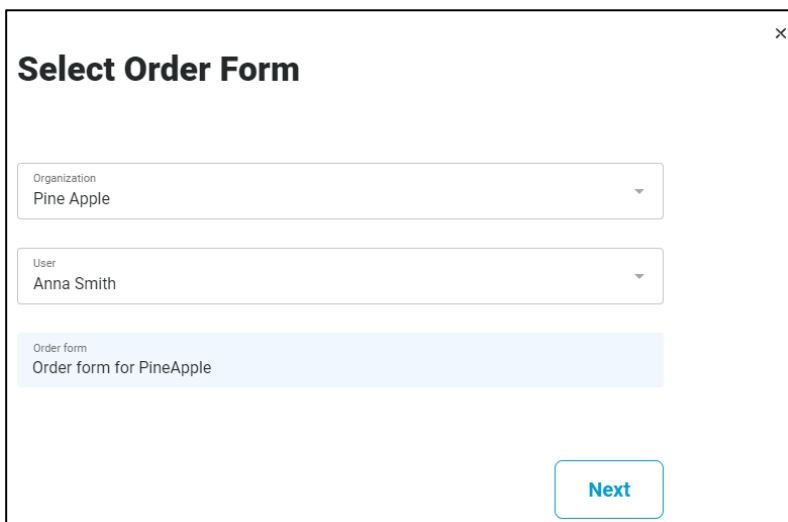
Every order can be created for one organization. Organizations have members (users) and the roles that users can play in this organization.

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.

Order Workflow

Consumers can order tests from the laboratory that uses the synchronized LABWORKS Enterprise LIMS.

First, an 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).



Select Order Form

Organization
Pine Apple

User
Anna Smith

Order form
Order form for PineApple

Next

To create orders for themselves, users should have the *Manage own orders* permission in this organization. To create orders for other users, creators should have the *Manage consumer's orders* permission in this organization.

The list of available organizations also depends on these permissions.

Then, 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. Also, additional

analyses can be selected, if they are present in this order form, even if they are not included in an added catalog item.

Order Items Step 1 of 3

Owner: Anna Smith | Organization title: Pine Apple

Order items list [Add catalog item](#)

Sample description: description

[Attach](#)

LW.png

14-1-163	
BOD	
pH x	
Single inside a group	
TSS	

Analyses [Add analysis](#)

Consumers can add empty custom samples that are not based on catalog items, but in that case, the order creator should add comments or attachments to describe what should be done in the laboratory. Custom analyses can be added to custom samples.

Sample description: I need some water tests for...

[Attach](#)

Analyses [Add analysis](#)

Sample does not contain any custom analyses.

Then, consumers can choose 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. And fill additional order fields.

Order Details Step 2 of 3

Owner: Anna Smith | Organization title: Pine Apple

Addresses

Report address [Add](#)
Report address is not specified.

Invoice address [Add](#)
Invoice address is not specified.

CC Addresses [Add](#)
CC list is empty.

Details

Shipping information: drop-down new value

Finally, order creators can review all ordered items, addresses, and order details fields. They can check and save an order as a draft or submit it.

When the order is submitted, it becomes available for the laboratory. All the provided information is synced. The laboratory users can create ordered samples and make tests. Also, laboratory users can open the Exchange Portal and see the details of orders, order attachments, etc.

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, in 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).

Exchange Portal sample statuses can be the following:

- Draft – When the order is in the Draft status. The order has not yet been formed.
- Submitted – If the order status is Submitted and the laboratory has not onboarded this sample yet.
- Received – The sample is received by the laboratory.
- In progress – The laboratory is working on it.
- Completed – The work on this sample is finished, all tests are done.

Order statuses depend on the following rules:

- Draft – The order has not been formed yet; 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. It means that the laboratory onboarded the order and it cannot be edited anymore.
- Completed – When all samples in the order have the portal Completed status. 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 of which they are members.

1. Global administrators
 - a. Have all consumer permissions.
 - b. They are not members of organizations; they can work with all organizations.
2. Organization administrators
 - a. Have all consumer permissions in the organization (or all organizations) where they have the Org admin role.
3. Laboratory users
 - a. Have all consumer permissions.
 - 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 the access only to the Consumer part of the portal.
- b. Can add and manage orders only for themselves.
- c. This role can be set on a per organization basis or globally for all organizations.
- d. The following permissions are enabled:
 - i. Contact us – They can write support requests.
 - ii. View orders list - They can open the **Orders List** screen and see the orders they own.
 - iii. View order details - They can open the **Order Details** dialog of the orders they own, see the ordered items, order details fields and addresses, participate in discussions, see or manage attachments.
 - iv. View results – They can open the Results tab of the **Order Details** dialog.
 - v. Manage own orders – They can create orders for themselves, edit and reorder orders.
- e. The following permissions are disabled:
 - i. View hidden fields – View fields marked as hidden in the order form by administrators.
 - ii. View audit trails – View audit trails about order changes.
 - iii. Manage consumer's orders – Create orders for other users, see, and manage them.

5. Users with custom roles

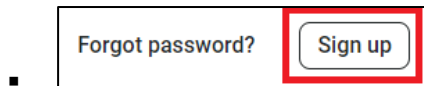
- a. Have custom roles on a per organization basis or one global role for all organizations.
- b. Permissions depend on their roles.
 - i. Contact us – All users have this permission by default and it cannot be removed. It means that all users can write support requests.
 - ii. View orders list - All 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.
 - iii. 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.
 - iv. View results – Users with this permission can open the Results tab of the **Order Details** dialog.

- v. View hidden fields – Some fields can be marked as hidden for order forms. These fields should not be displayed for consumers, but users with the *View hidden fields* permission can see them on the **Order Details**.
- vi. View audit trails – Users with this permission can view all audit trails about order changes.
- vii. 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.
- viii. Manage consumer's orders – This permission allows to create orders for other users, edit, and reorder them. Such users can see not only their orders, but also orders created for organizations in which the user has the *Manage consumer's orders* permission.

Get Access to the Exchange Portal

There are 4 ways to become an Exchange Portal's user:

- An administrator can invite you.
 - You will receive an email with instructions.
 - Follow the link in the email and sign up.
- Self-registration
 - If self-registration is allowed by administrators, you can click the **Sign up** button at the right-top corner of the **Sign in** screen and sign up.

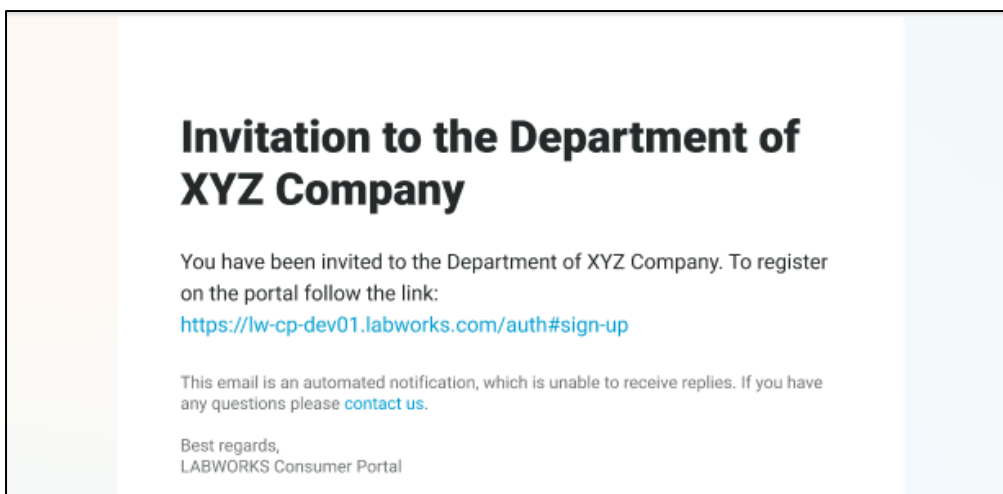


- LIMS lab users
 - If you have the access to the LABWORKS Enterprise LIMS, your account will be automatically synchronized with the LABWORKS Exchange Portal.
 - Follow links to orders in LIMS or sign in using the Sign In screen.
 - Please note that you need to restore your password for the first time 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.

Invitation

Users can be invited to the portal by administrators.

In that case, the invitation email will be sent to your email address. Check Inbox to find emails from the Exchange Portal. This email will contain the information about your invitation and the invitation link.



Click the invitation link and the **Sign Up** dialog will be open (see details in the Sign Up section of this document). After the registration, you can log into the portal using the **Sign In** screen. You will be a

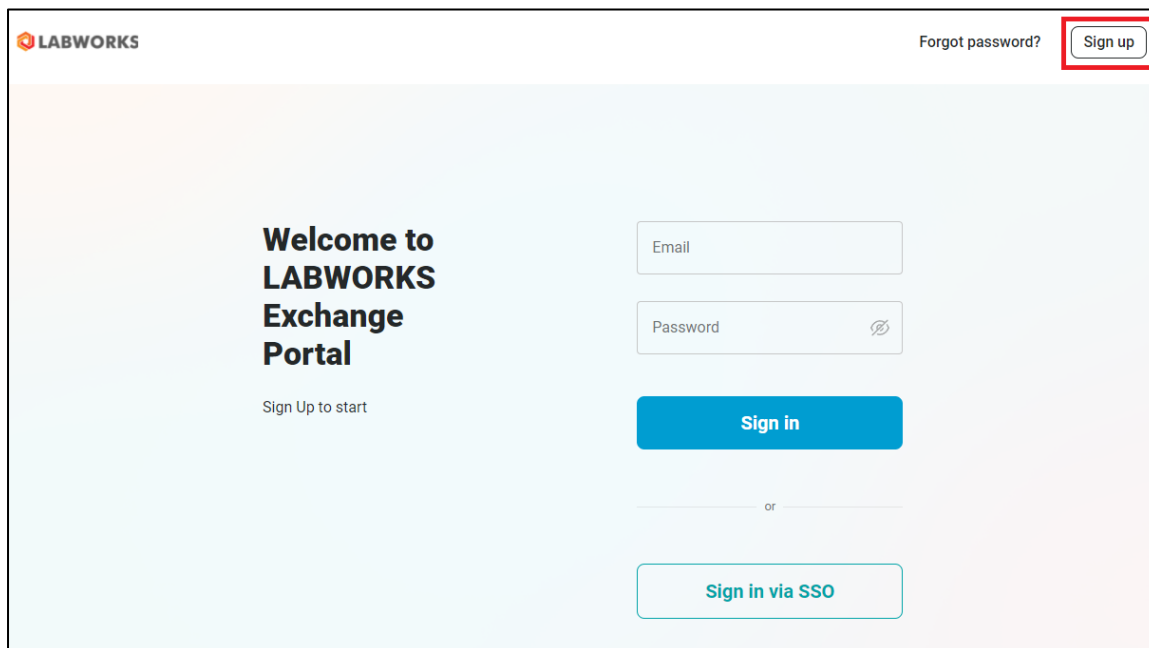
member of organizations specified by the administrator who invited you. And this administrator gave you roles in these organizations which determine the functionality available to you in the portal.

Self-registration

The self-registration availability depends on the Exchange Portal settings.

If administrators have enabled self-registration, you will see the **Sign Up** button on the **Sign In** screen and you can register in the system without invitations.

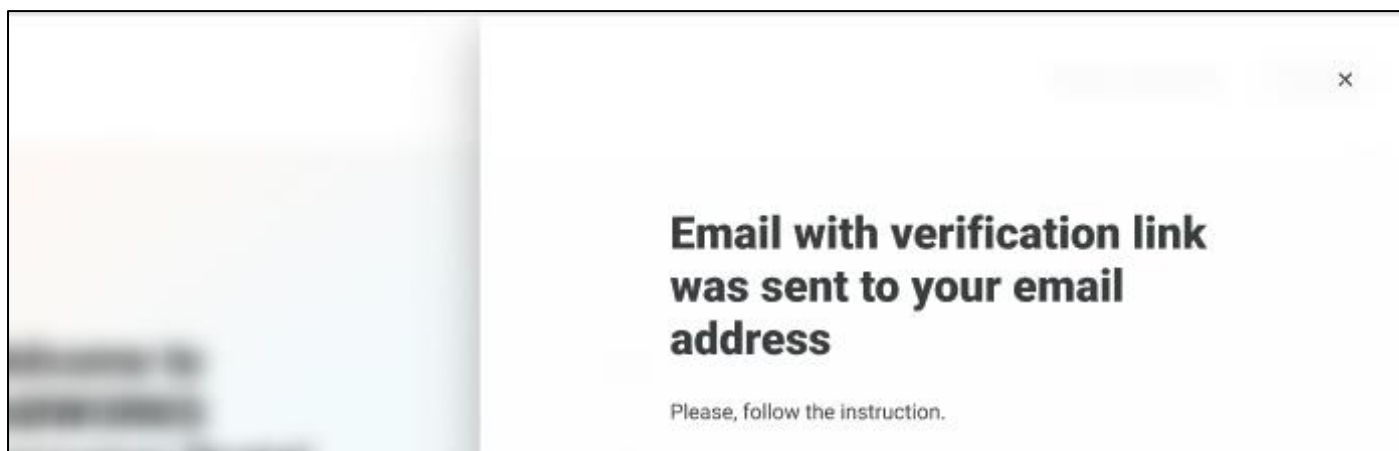
Click the **Sign up** button on the **Sign In** screen, open the **Sign Up** dialog and register in the system.



The screenshot shows the LABWORKS Sign In interface. At the top left is the LABWORKS logo. At the top right, there is a "Forgot password?" link and a "Sign up" button, which is highlighted with a red rectangle. The main content area features the text "Welcome to LABWORKS Exchange Portal" and "Sign Up to start". Below this, there are input fields for "Email" and "Password" (with an eye icon for visibility toggle). A blue "Sign in" button is positioned below the password field. Below the "Sign in" button, there is an "or" separator and a "Sign in via SSO" button.

Your domain part of the email address will be specified by administrators for existing portal organizations to allow you to register and become a member of them.

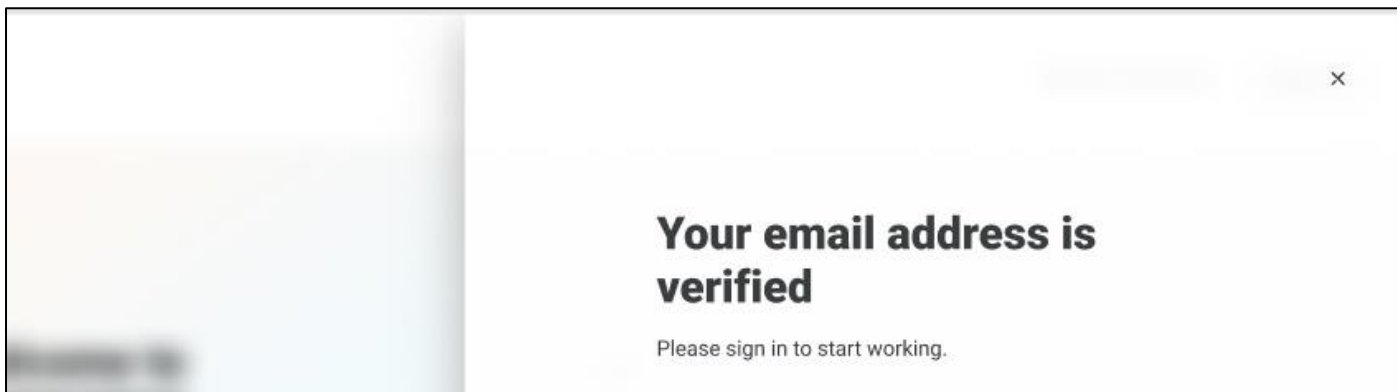
After registration, you need to verify your email address. You will receive the email with the verification link, please check your Inbox



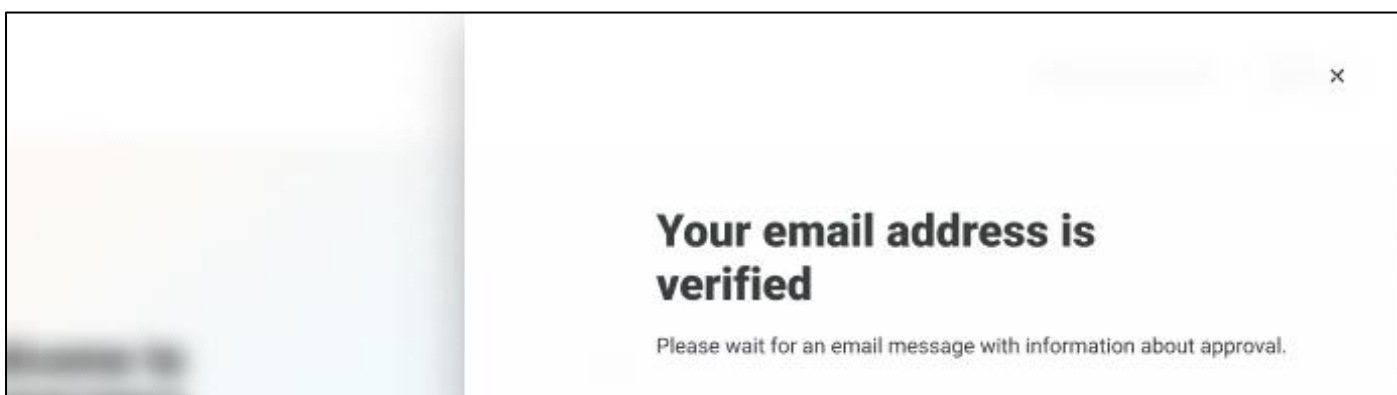
You should click this link and you will be redirected to the **Sign In** screen with the notification that the email is verified. Until the email is verified, you cannot work with the portal.

Further workflow depends on the portal settings.

If it is configured by administrators, you will receive the Active status and can input your credentials on the **Sign In** screen, click the **Sign in** button and log into the portal.



It can be configured that you should be approved or rejected by administrators. Please wait for new emails from the portal or information from administrators.

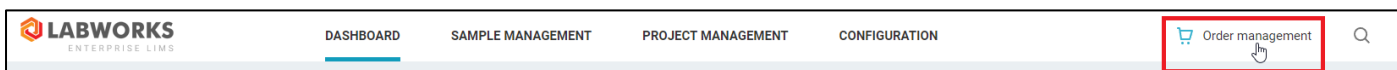


LIMS lab users

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

LIMS lab users can open the portal in two 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 in 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**.

Sample ID	Order ID	Order attachments
AE48435	ORD-194	1

Sample ID	Order ID	Order attachments	Grc
AE48435	ORD-194	1	22

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.

Please restore your password and use the new one to sign in.

Welcome to LABWORKS Exchange Portal

Sign Up to start

Email
a@labworks.com

Password
.....

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.

Forgot Password?

Email

Send link

The email with the password restoration link will be sent to this email address. If you 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.

New Password

Enter new password

Re-enter new password

Change password

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.

SSO users

If the SSO authentication is supported by the Exchange Portal, 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”).

LABWORKS Forgot password? [Sign up](#)

Welcome to LABWORKS Exchange Portal

[Sign Up to start](#)

Email

Password

Sign in

or

Sign in via SSO

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.

Sign Up

Email

email from SSO provider

Please enter a valid email address.

First name

first name from SSO provider if exists

Last name

last name from SSO provider if exists

Password

.....



Re-enter password

.....



I accept [Terms and conditions](#) and [Privacy policy](#)

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

Sign In


LABWORKS

Forgot password? [Sign up](#)

Welcome to LABWORKS Exchange Portal

Sign Up to start

Email

Password 

Sign in

or

[Sign in via SSO](#)

[Terms and conditions](#) [Privacy policy](#) [Contact Us](#) [Non discriminatory Statement](#)

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 the LABWORKS Exchange Portal:

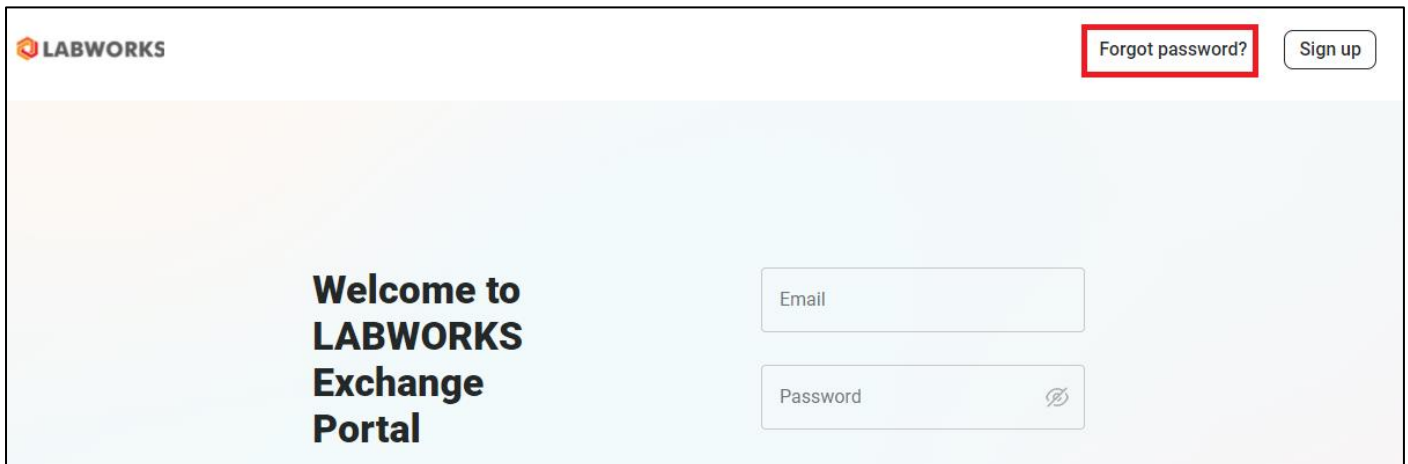
1. URL-address of the LABWORKS Exchange Portal in your network.
2. Your email address and password.

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.

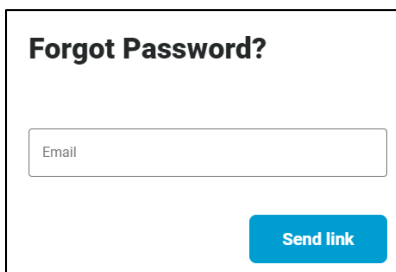
Restore password

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



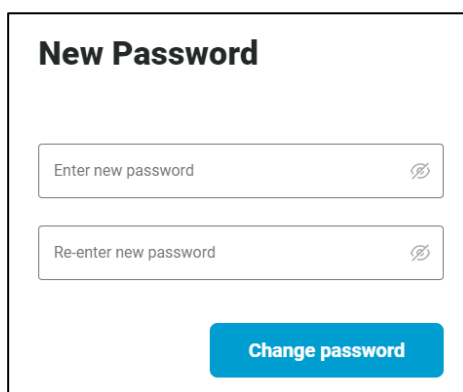
The screenshot shows the LABWORKS Sign In page. In the top right corner, there is a 'Forgot password?' link highlighted with a red rectangular box, and a 'Sign up' button next to it. The main content area features the text 'Welcome to LABWORKS Exchange Portal' on the left and a login form on the right. The form consists of two input fields: 'Email' and 'Password', with a small circular icon to the right of the password field.

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



The 'Forgot Password?' dialog box is shown. It has a title 'Forgot Password?' at the top. Below the title is an input field labeled 'Email'. At the bottom right of the dialog is a blue button labeled 'Send link'.

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.



The 'New Password' dialog box is shown. It has a title 'New Password' at the top. Below the title are two input fields: 'Enter new password' and 'Re-enter new password'. At the bottom right of the dialog is a blue button labeled 'Change password'.

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

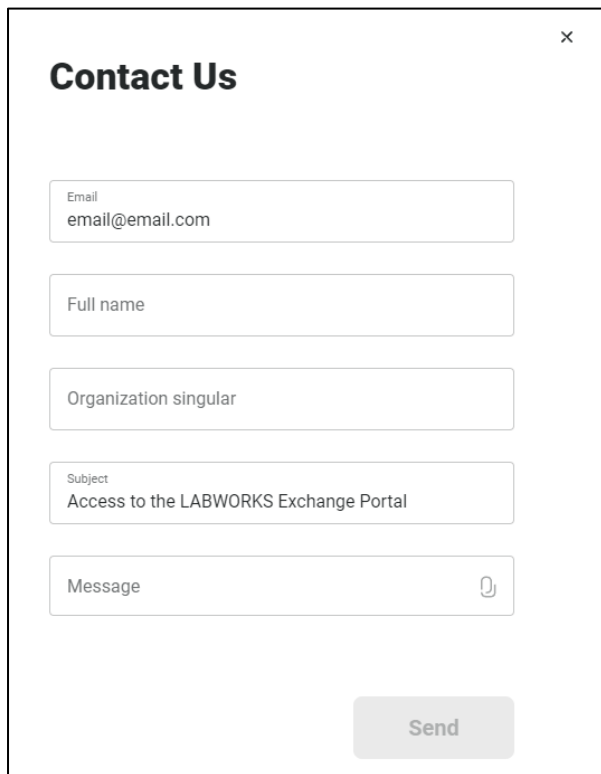
Sign In - Contact Us

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

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

[Terms and conditions](#) [Privacy policy](#) [Contact us](#)

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




Contact Us ×

Email
email@email.com

Full name

Organization singular

Subject
Access to the LABWORKS Exchange Portal

Message 

Send

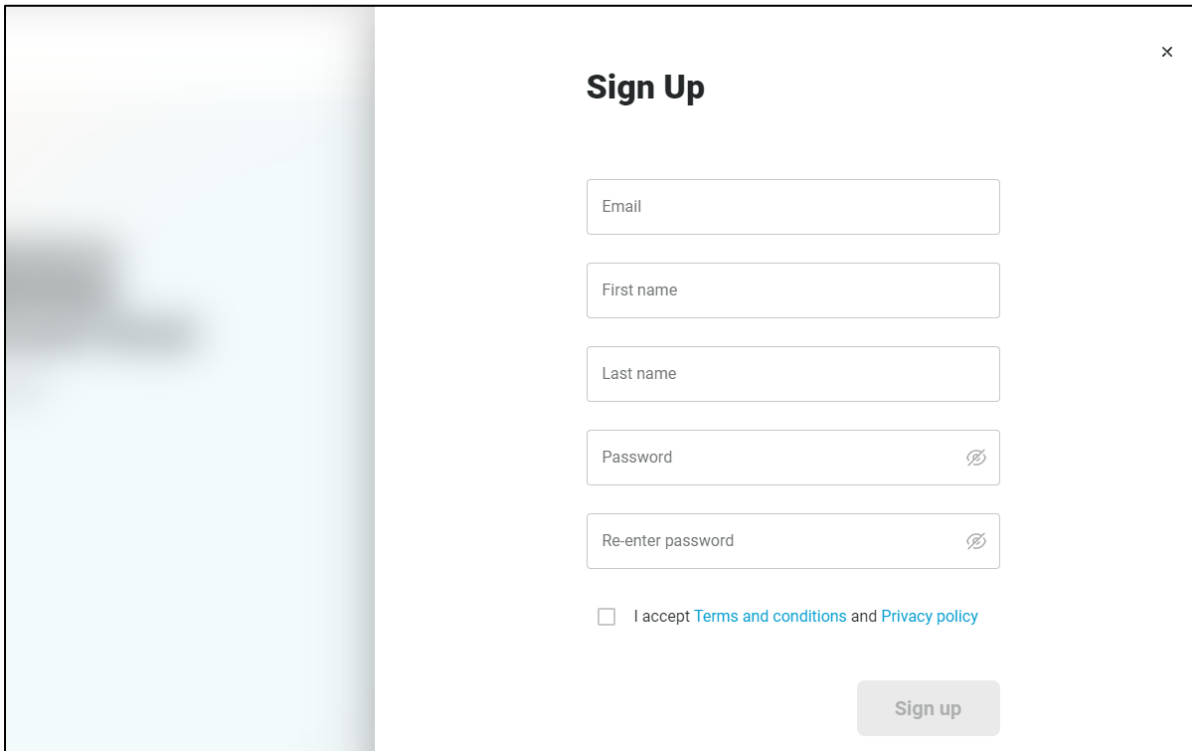
Fill in the email address to which you want to receive a reply, your full name, organization. Specify the subject and your question. You can add attachments to your message if needed. Click the **clip** icon and select one or more files on your computer.



Message 

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

Sign Up



Sign Up

Email

First name

Last name

Password

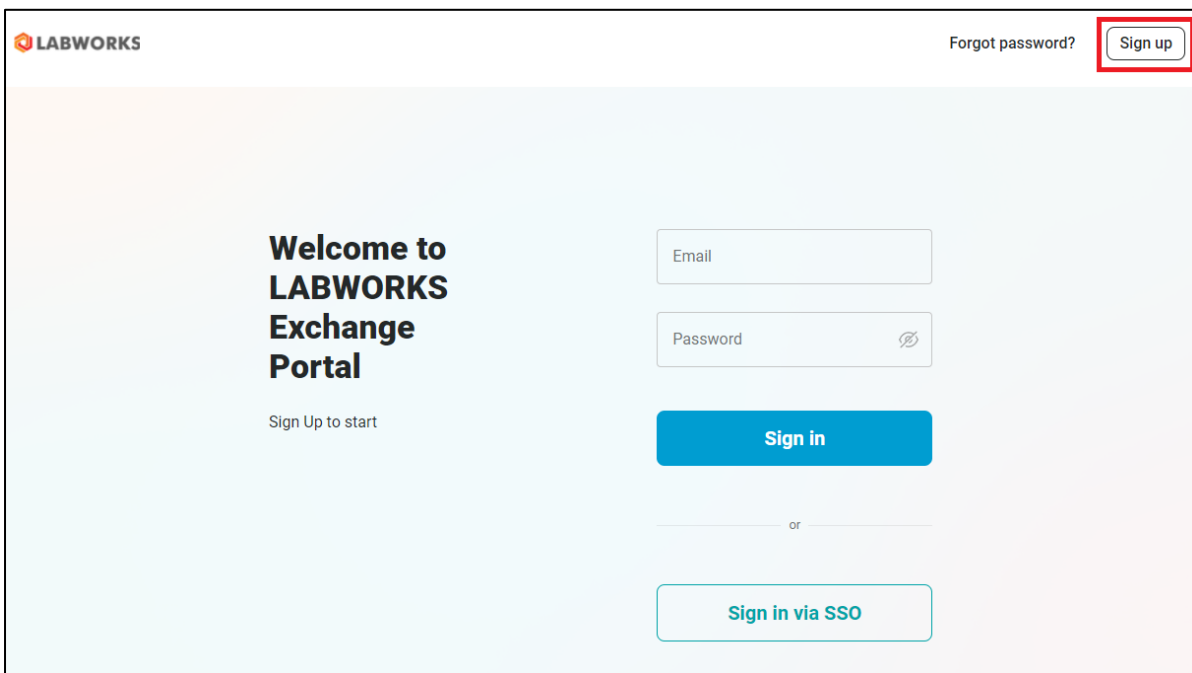
Re-enter password

I accept [Terms and conditions](#) and [Privacy policy](#)

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.



LABWORKS

Forgot password? **Sign up**

Welcome to LABWORKS Exchange Portal

Sign Up to start

Email

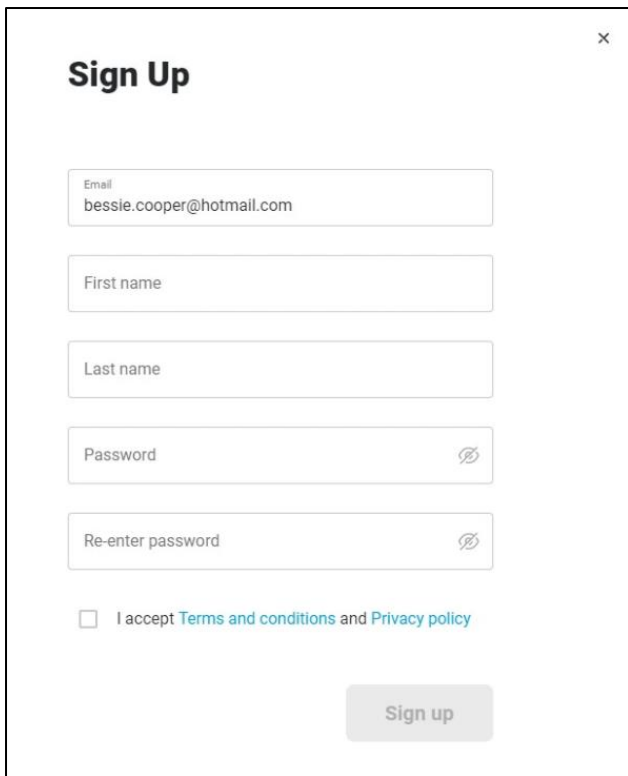
Password

Sign in

or

Sign in via SSO

Please specify your email, first name, last name, and the password.

A screenshot of a 'Sign Up' form. The form is titled 'Sign Up' in bold black text at the top left. Below the title are five input fields: 'Email' (containing 'bessie.cooper@hotmail.com'), 'First name', 'Last name', 'Password', and 'Re-enter password'. Each of the last four fields has a small circular icon with a slash on the right side. Below the input fields is a checkbox followed by the text 'I accept [Terms and conditions](#) and [Privacy policy](#)'. At the bottom center is a grey 'Sign up' button.

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.

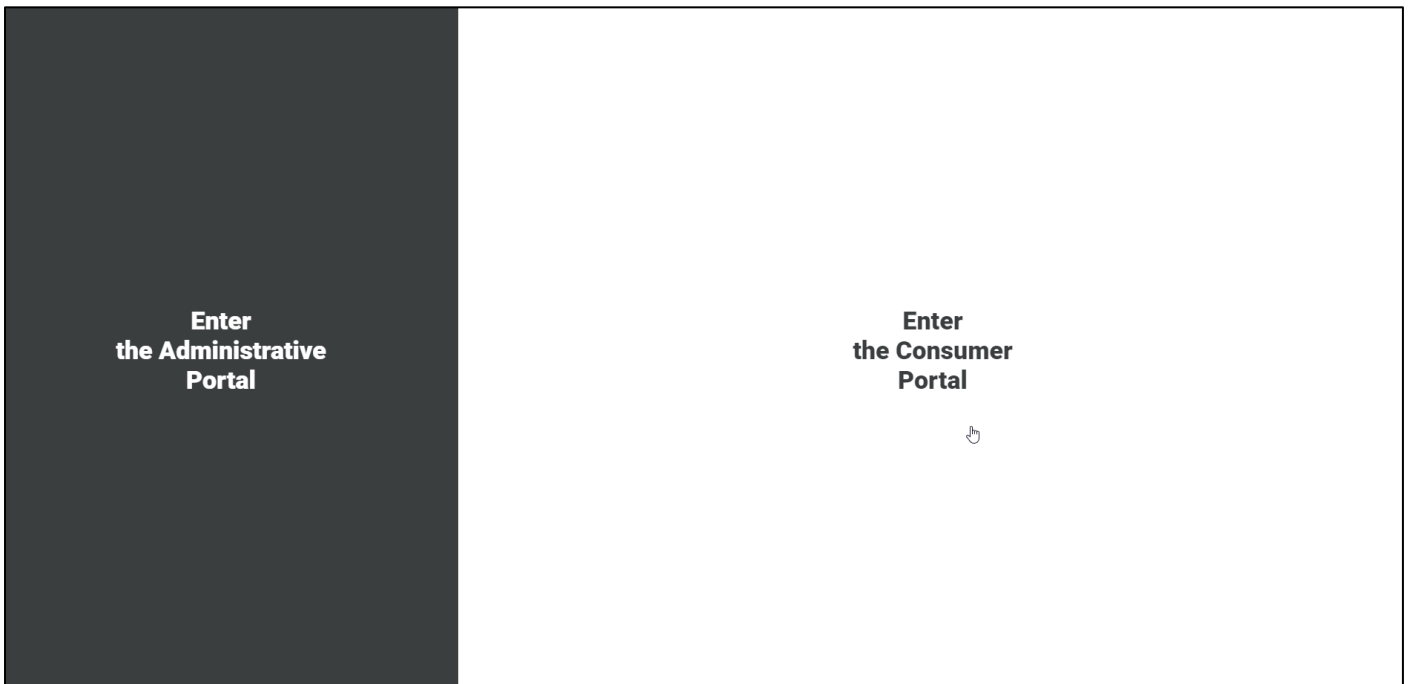
If self-registration is restricted, you can have the access to the portal only by invitations from administrators or via SSO.

Select Portal

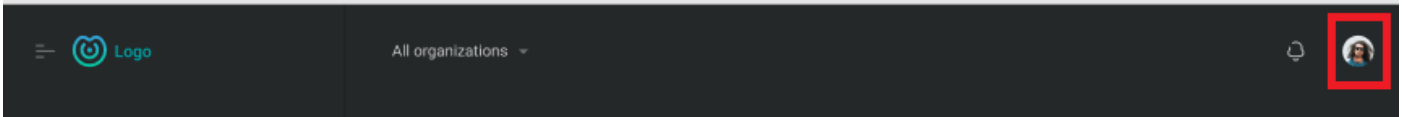


If a user has permissions to the Administrative part and to the Consumer part, the Select Portal screen will be open after signing in.

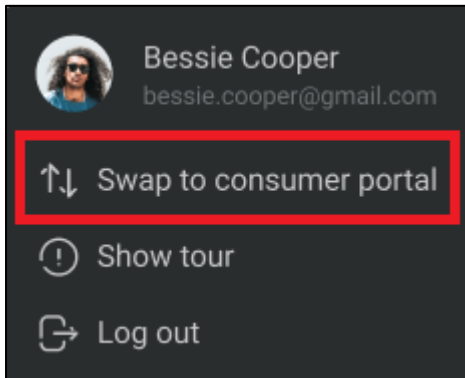
Select the Consumer Portal “white” option to navigate to the Consumer part of the application.



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.



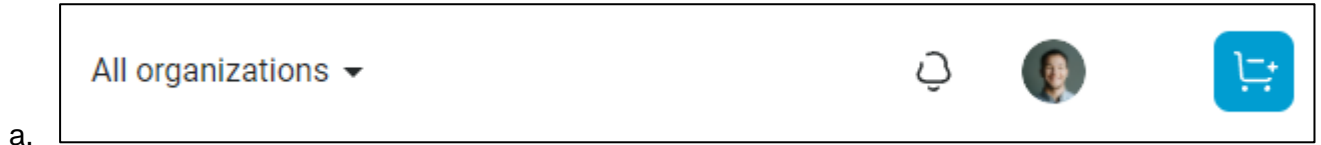
Repeat these steps if you are working with the Consumer part of the portal and want to go to the Administrative part.

Users that do not have administrative permissions will not see the described in this section functionality.

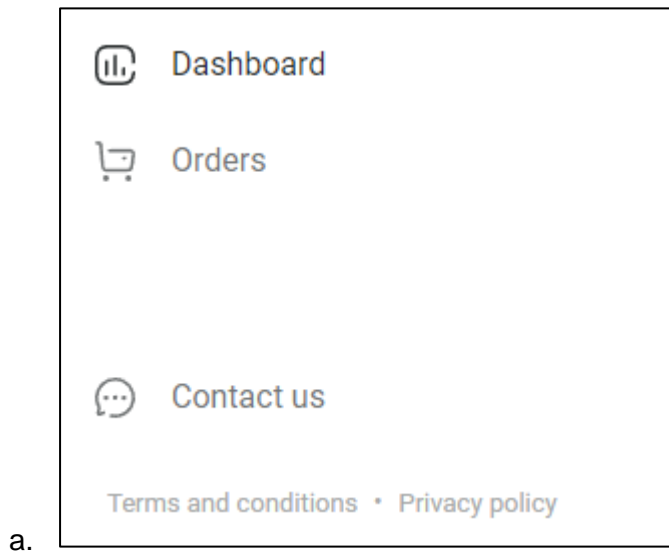
Application Interface

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

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



2. **Left menu** displays screen-specific information, links to the Privacy Policy and Terms and conditions, the **Contact Us** button.

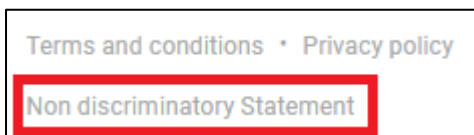


The **Left menu** is used to switch between the areas:

1. Dashboard with quick links to all screens and the number of orders.
2. Orders management area serves for working with orders.

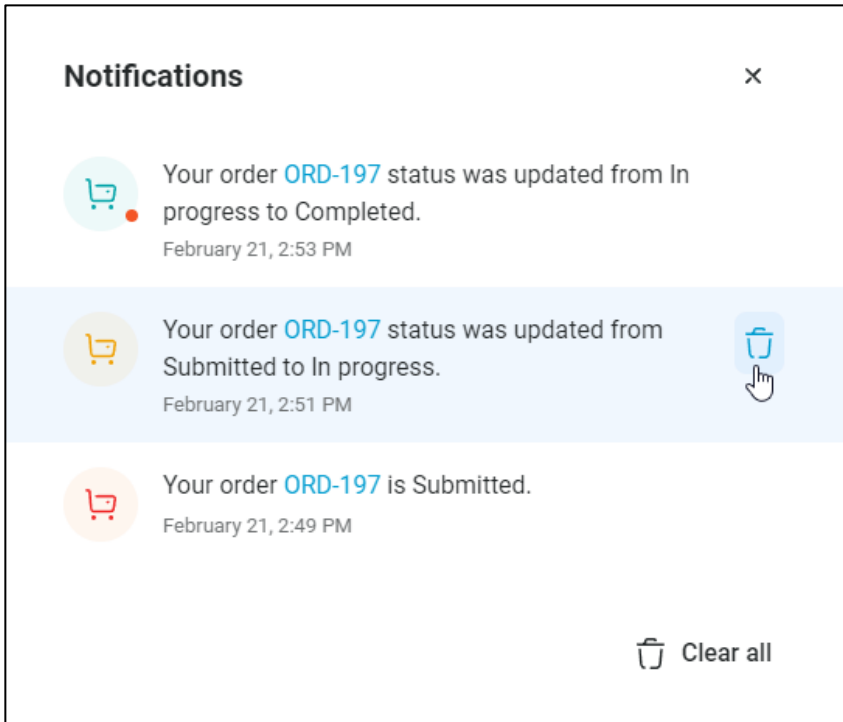
Click the Privacy policy link to open and read the Privacy policy; click the Terms and conditions link to open and read the Terms and conditions.

Additional footer link may be configured by administrators. Click on it to see the details.



If you have any questions, click the **Contact Us** button in the lower left corner. The **Contact Us** dialog will be open.

By clicking the **bell icon**  , you can open the **Notifications pop-up** and see your system notifications.

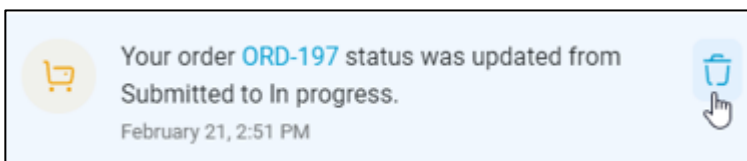


When there are unread notifications, the bell icon and these items are marked with the orange circle.

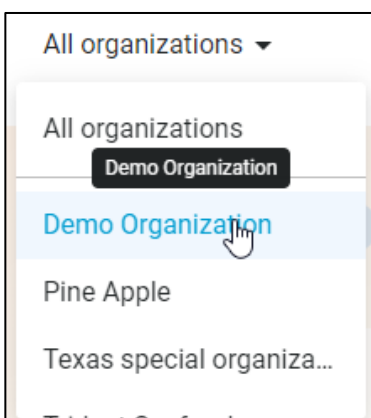


In the **Notifications pop-up**, there are only notifications received in bounds of the Notification timeframe, that was configured by administrators. It means that some notifications will disappear after this timeframe is reached. E.g., if 24 hours is configured for the system, you will see only notifications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

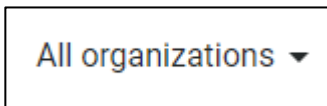
Click the **trash** icon to remove not needed items or click the **Clear all** button to delete all notifications.



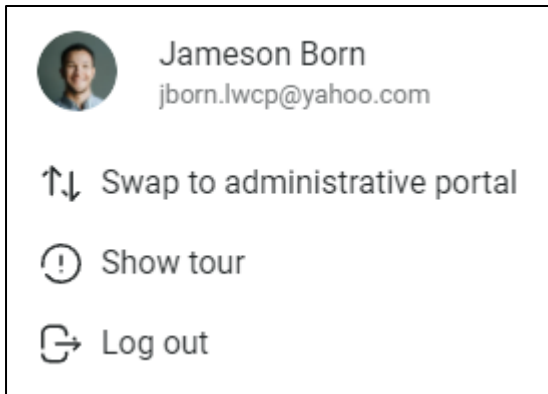
You can filter all screens by selecting a specific organization in the Organization filter if you are a member of more than one organization.



Or work with all organizations in the system.



The **User menu** is used to navigate to the **User Profile** screen and sign out of the portal to end the session. You can also open the tour with tips how to work with the Consumer part of the portal or swap to the Administrative part if you have administrative permissions.



If you have permissions to create orders for yourself or other people (the *Manage own orders* permission and/or *Manage consumer's orders* permission), you can click the **Create order** button. The **Create Order** wizard will be open.




Contact Us

Contact Us ×

Email
jborn.lwcp@yahoo.com

Full name
Jameson Born

Subject

Message 

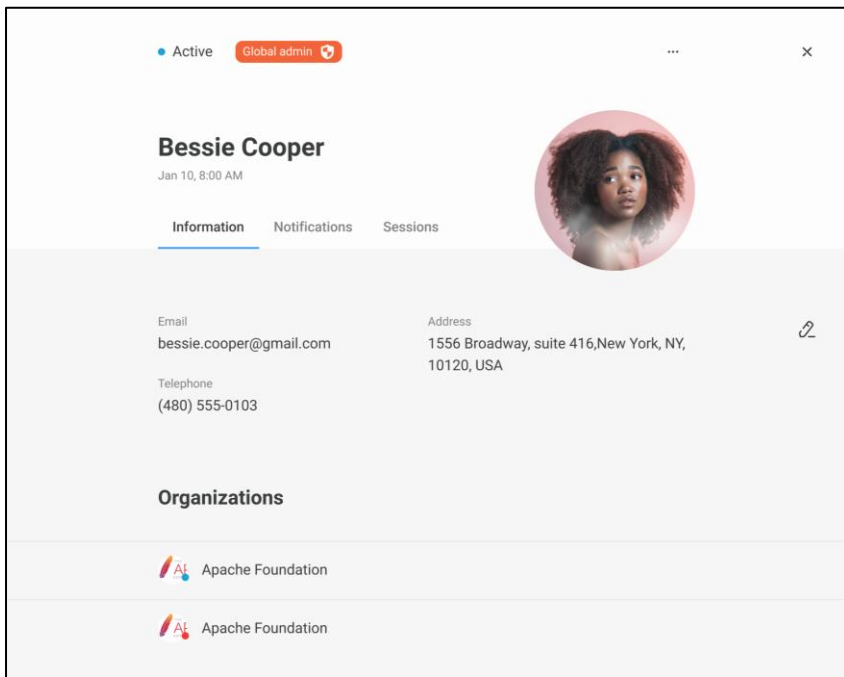
Send

The email address and your full name will be filled with the data from your account. You need to specify the subject and your question. You can add attachments to your message if needed. Click the **clip** icon and select a file on your computer.

Message 

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

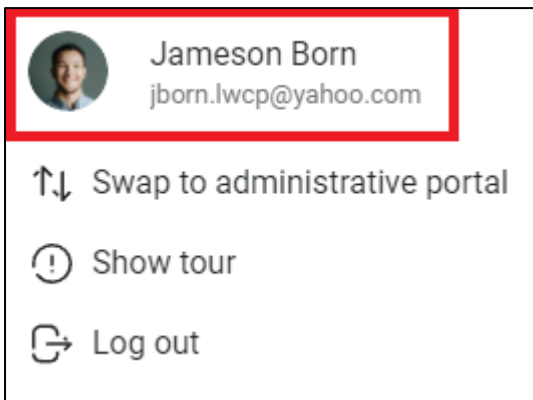
Consumer Profile



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 Consumer 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.

Active Global admin

Bessie Cooper

Jan 10, 8:00 AM

Information Notifications Sessions

First name
Bessie

Last name
Cooper

Telephone
(480) 555-0103

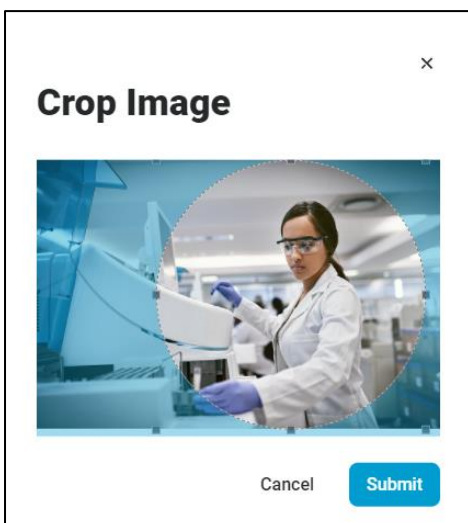
Address
1556 Broadway, suite 416, New York, NY, 10120, USA

Cancel Save

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.



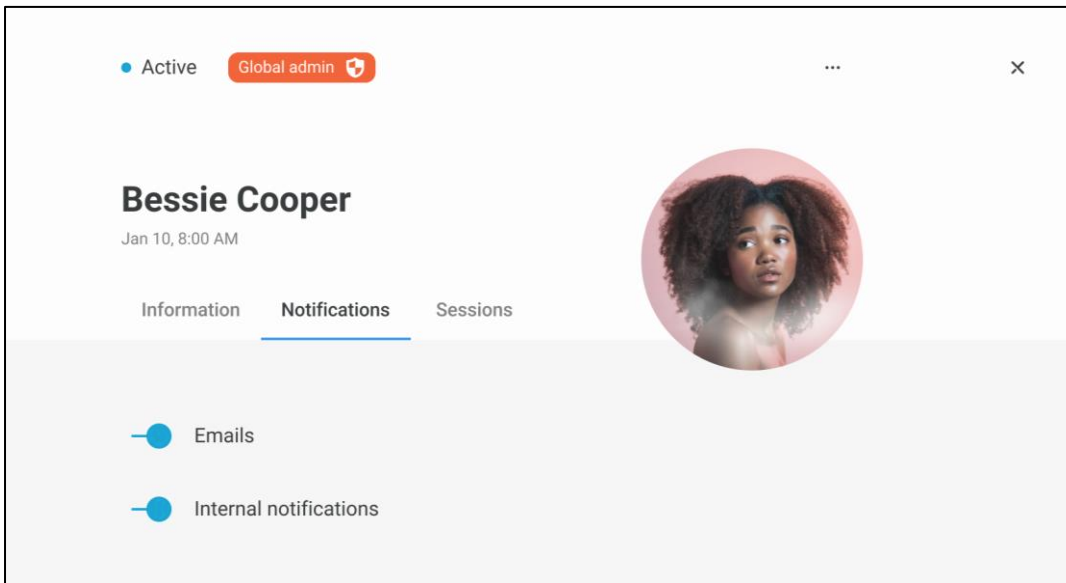
Once you selected the picture on your device, the **Crop Image** dialog is open.



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.



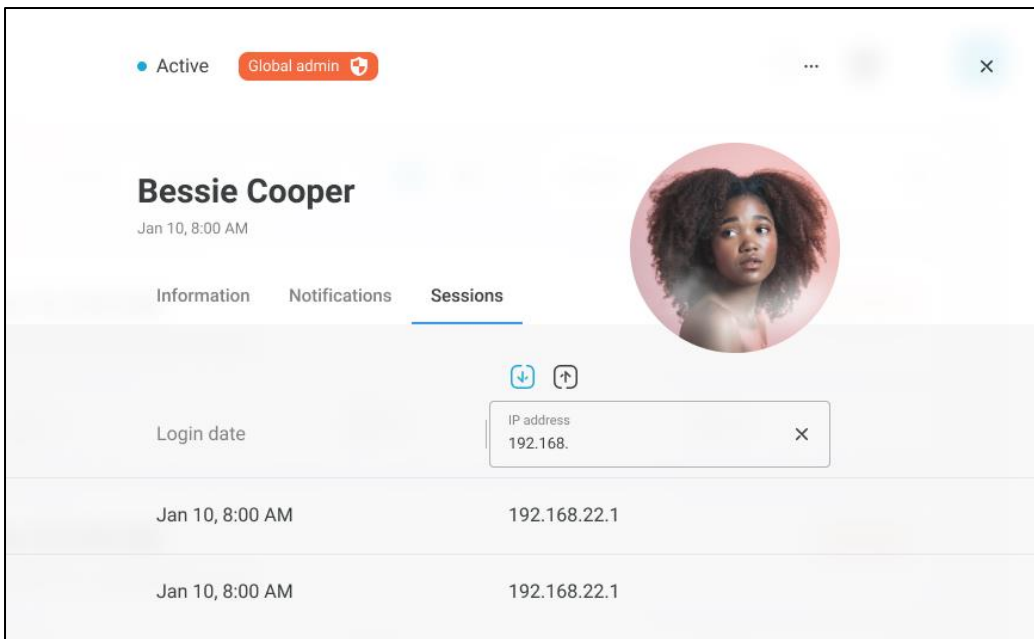
- If you switch off the **Emails** toggle, you will not receive email notifications on your email address.
- If you switch off the **Internal notifications** toggle, you will not receive internal notifications (see details in the Application Interface section of this document about the **Notifications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

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

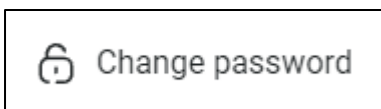
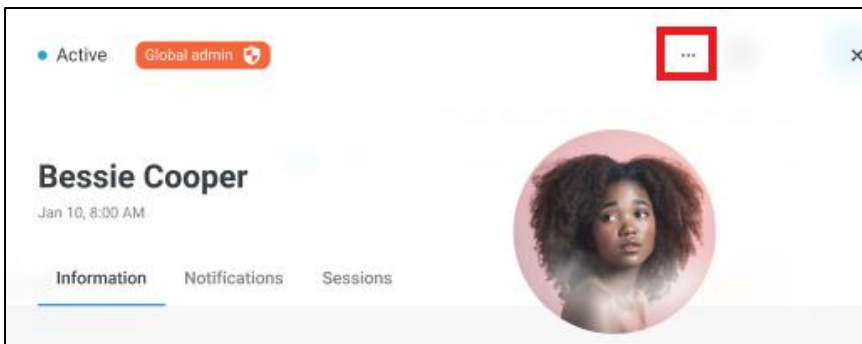
- Orders creation
- Order status updates
- Submitted order modifications (e.g., attachments, new results, order editing, etc.)

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.

Change Password

Current password
.....

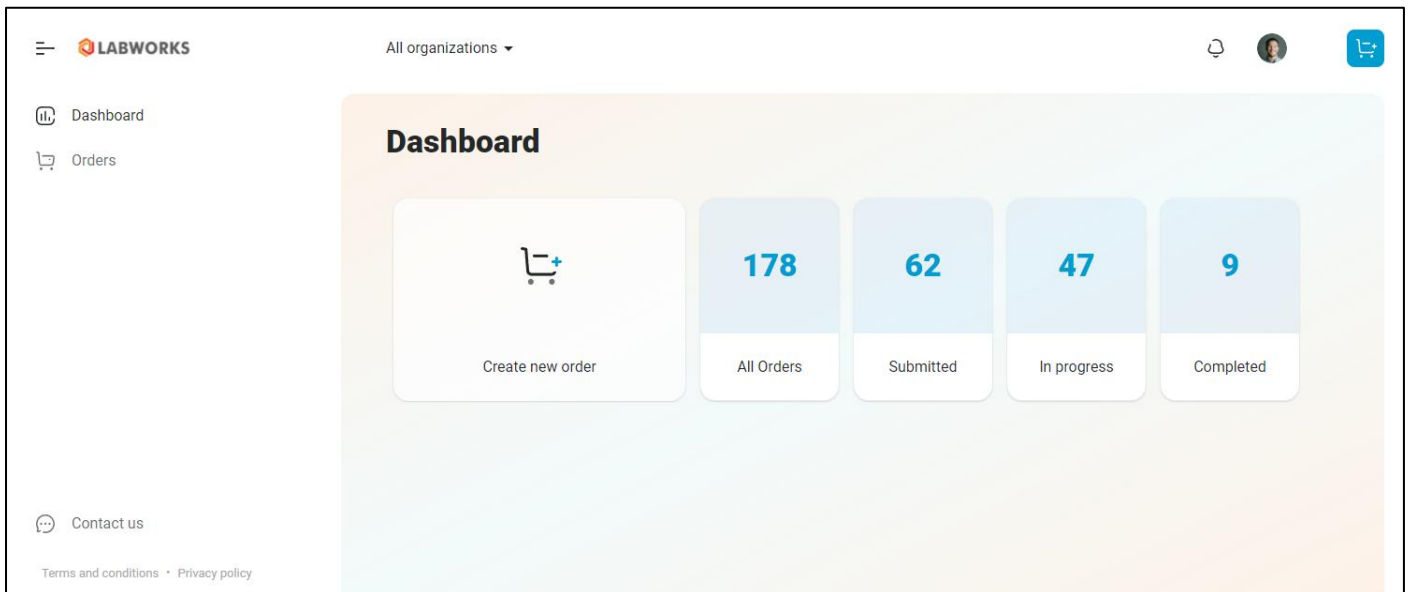
Enter new password

Re-enter new password

Cancel Change password

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

Consumer Dashboard



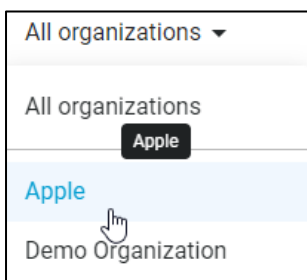
On this page, you will see the number of your orders:

- My orders – If you cannot manage order for other users, you can see here the number of all orders that you own.
- All orders – If you have the *Manage consumer's orders* permission, you will see the “All orders” instead of “My orders”. This button will display the number of all orders you own plus all orders in your organizations where you have the *Manage consumer's orders* permission.
- Submitted - Those of them that were submitted by users and became available for the laboratory.
- In progress - Those of them that were onboarded by the laboratory and at least 1 ordered item in the order was taken into work.
- Completed - Those of them that were completed which means all ordered items were completed in the laboratory and all tests were done.

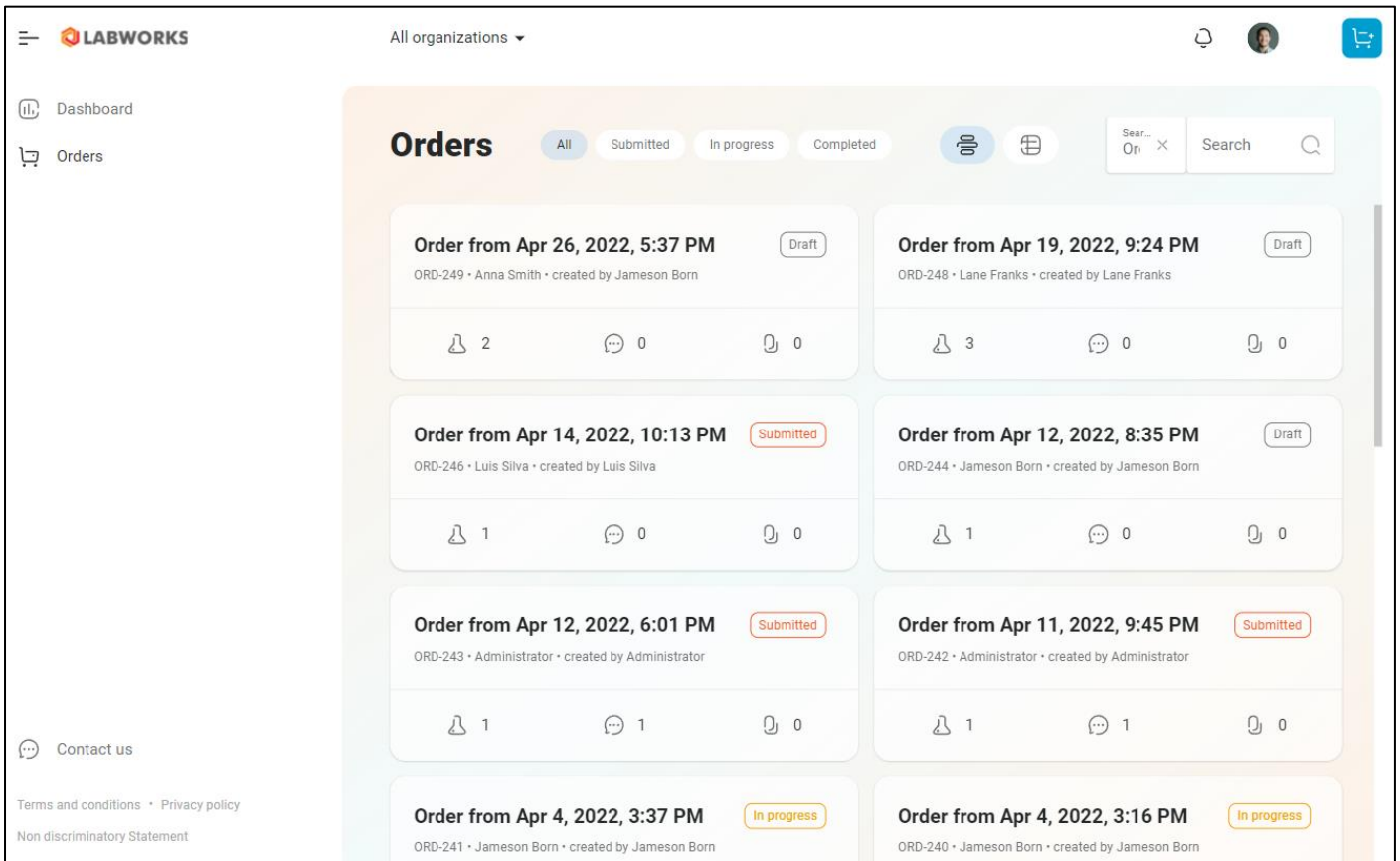
Click on these buttons to open the list of orders according to the button name.

Also, you can click the **Create new order** button and open the **Create Order** wizard if you have the *Manage own orders* permission.

Please note that the Organization global filter is applied to all portal screens, and if you selected one of the organizations, only orders for this organization will be taken into account on the Dashboard.

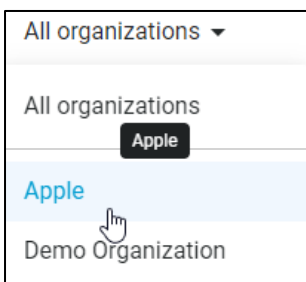


Orders List

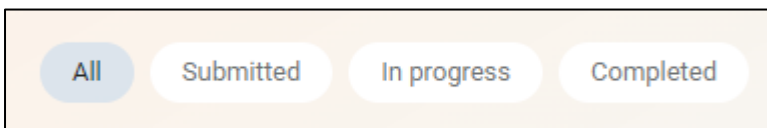


On the Orders List screen, users can see all orders they own (the user is the order owner). Also, if a user has the *Manage consumer's orders* permission, all orders for organizations where the user has a role with this permission will be displayed.

You can apply the Organization global filter to this screen, so, if you selected one of the organizations, only orders for it will be displayed.

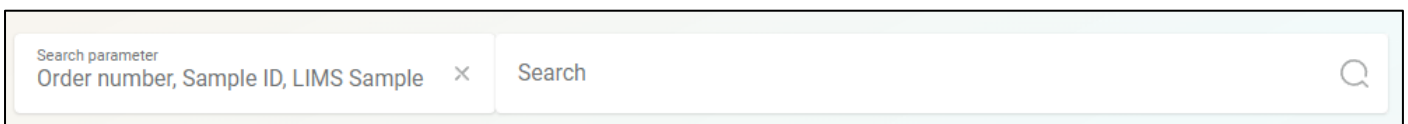


Use global filters to display all orders, submitted orders, orders in progress, or completed ones.



Click on any order to open the **Order Details** dialog.

To find needed orders, you can use the search.



You can use the following parameters to search by: Order number, Sample ID, LIMS Sample ID from LIMS, or the owner's name. Also, administrators can configure which parameters can be used to search for orders except the predefined ones: sample details and/or order details fields from order forms.

First, select the parameters by which you want to search for orders.

Search parameter
Order number, Sample ID, Project numbe ×

- Order number
- Sample ID
- LIMS Sample ID
- Owner full name
- Project number
- Submit Date

Then, input the value that needed order should contain. Wait a while or press Enter to start the search.

Orders All Submitted In progress Completed ☰ 🌐 Search parameter
Order number, San × Search
222 ×

Order number	Order date	Full name	Creator	Last modified	Comments	Samples	Status
Cp-19	Oct 13, 2021, 8:25 PM	Allan Lang	Jameson Born	Oct 13, 2021, 8:25 PM	0	3	Draft

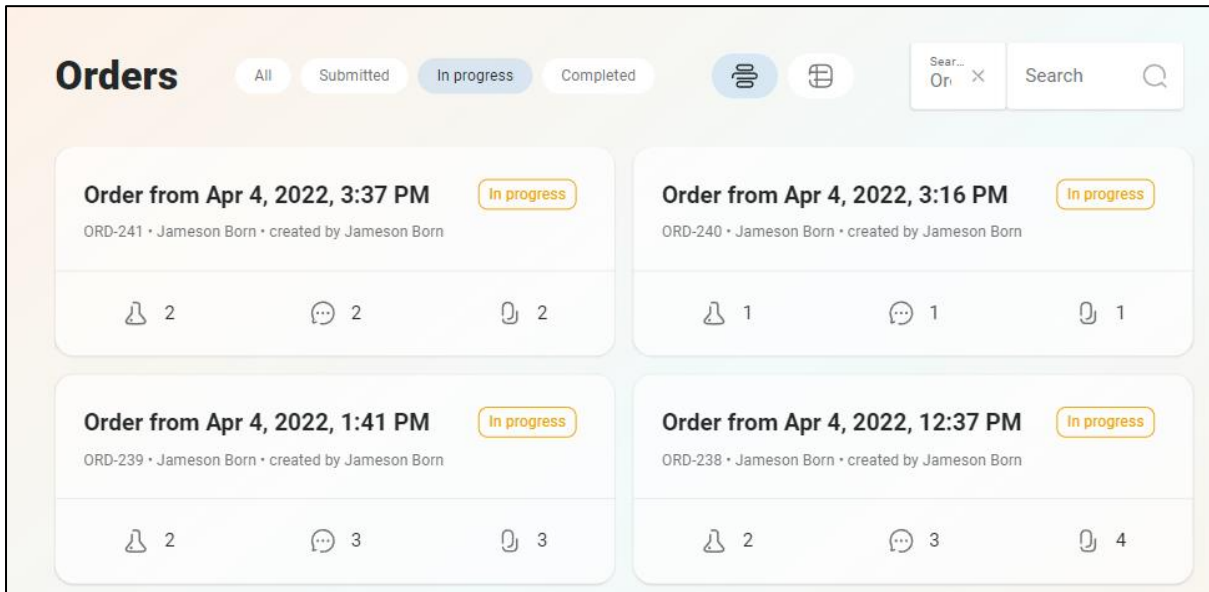
To cancel the search and see all orders, click the **X** icon.

Search parameter
Order number, San × Search
222 Clear filter ✕

The Orders List can be displayed in 2 view modes: the **Card view** and the **List view**. Click the corresponding icon to open the needed view mode.

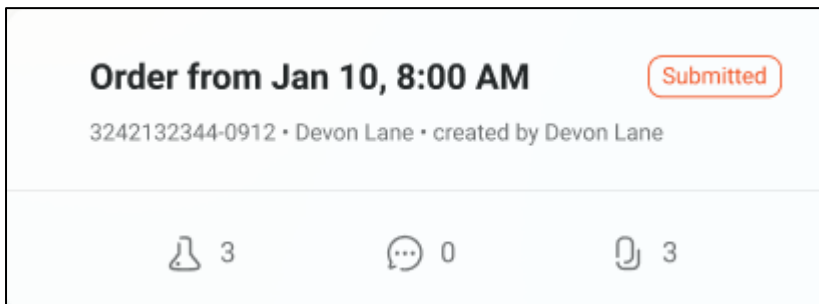


Card view



In this view mode, orders are represented as cards.

Every card contains the order creation date, the order status, order number (ID), order owner, and the order creator.



Also, you can see:

- 3 - Number of ordered items (samples)
- 0 - Number of messages (comments) in the discussion
- 3 - Number of all attachments of the order

You can use status, organization filters and the search described above.

Click on any card to open the **Order Details** screen.

List view

Order number	Order date	Full name	Creator	Last modified	Comments	Samples	Status
ORD-241	Apr 4, 2022, 3:...	Jameson Born	Jameson Born	Apr 4, 2022, 3:...	2	2	In progre...
ORD-240	Apr 4, 2022, 3:...	Jameson Born	Jameson Born	Apr 4, 2022, 3:...	1	1	In progre...

In this view mode, orders are represented as rows in the table.

The following columns are displayed:

- Order number (ID)
- Order date – Date and time when the order was created
- Full name – Order owner full name
- Creator - Order creator full name
- Lat modified - Date and time of the last order changes
- Comments - Number of messages in the discussion
- Samples - Number of ordered items
- Status – Order status

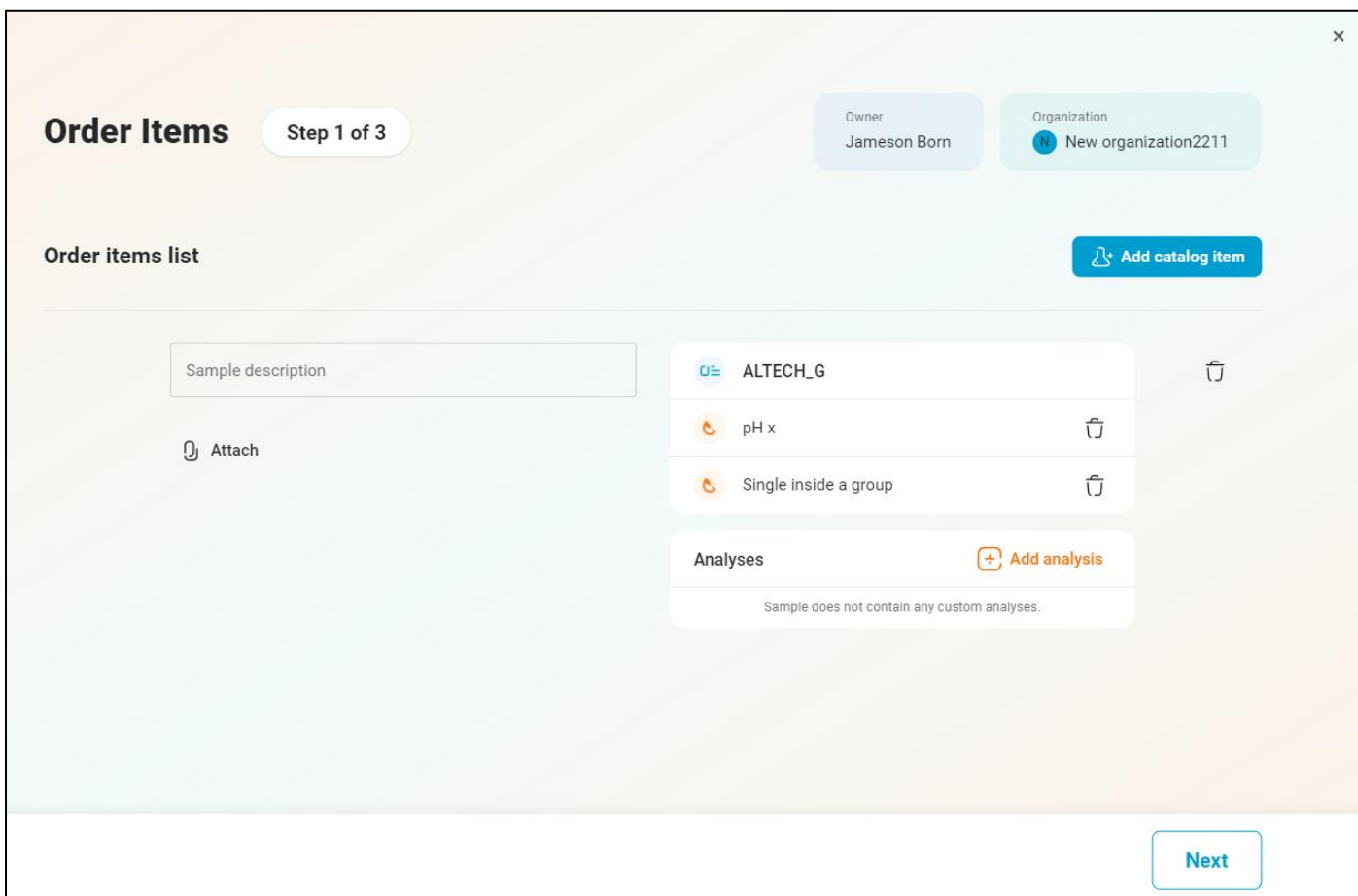
This view mode is convenient for using sorting and contextual filters by columns to quickly find the items you need.

Order number	Order date	Full name
ORD-194	Feb 16, 2022, 3:09 PM	Anna Smith

You can use status, organization filters and the search described above.

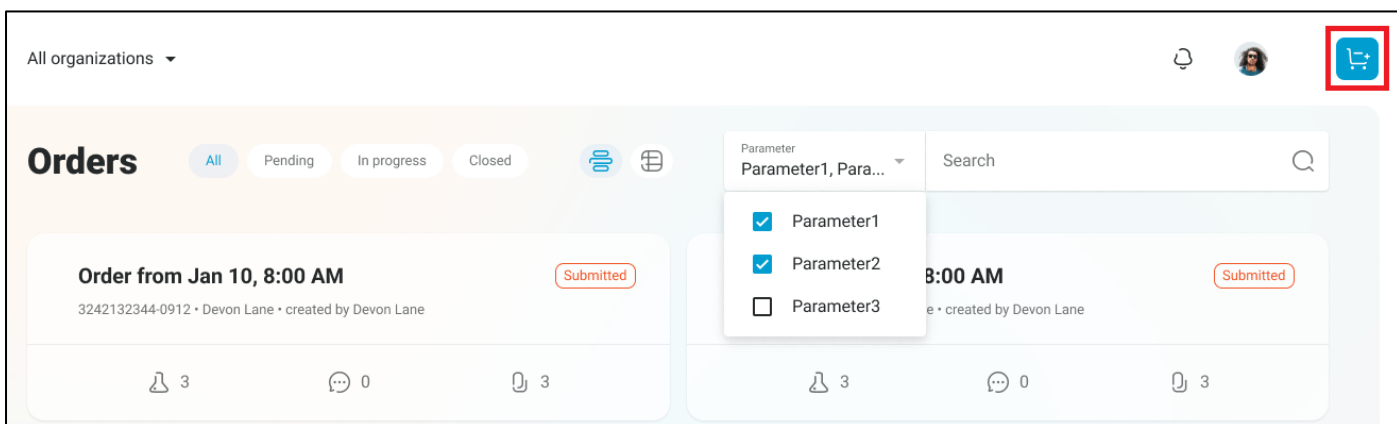
Click on any row to open the **Order Details** screen.

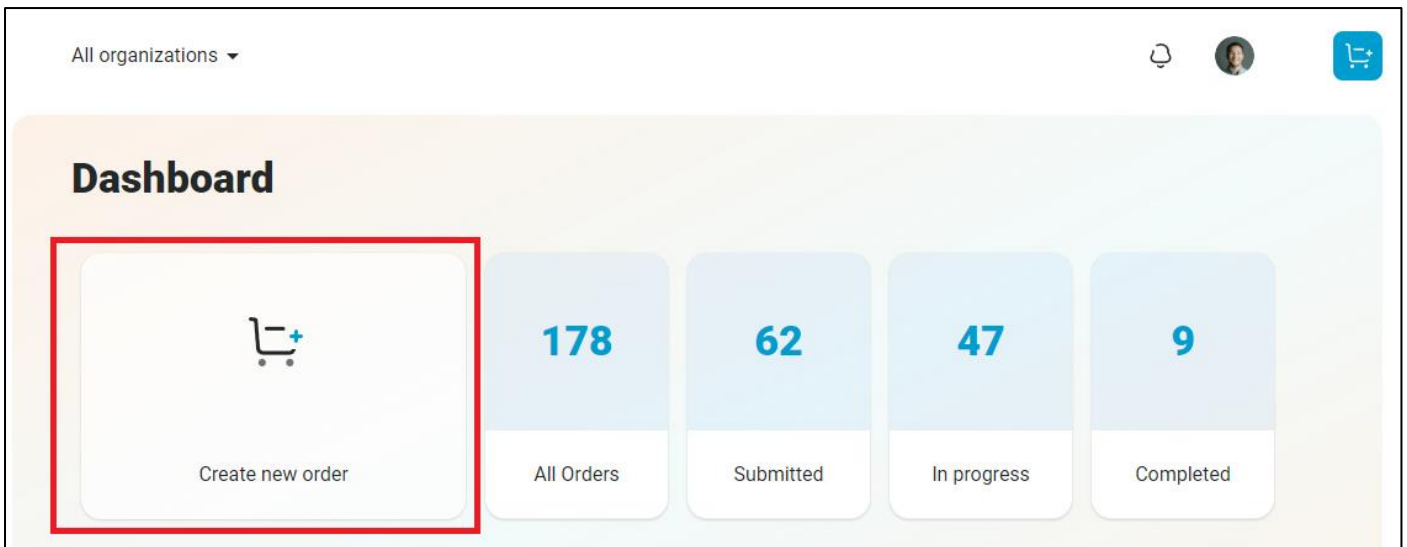
Create Order



The **Create Order** wizard is intended to add a new order to the system and order some tests in the laboratory.

Click the **Create order** button in the top-right corner of the Consumer part or on the Dashboard.

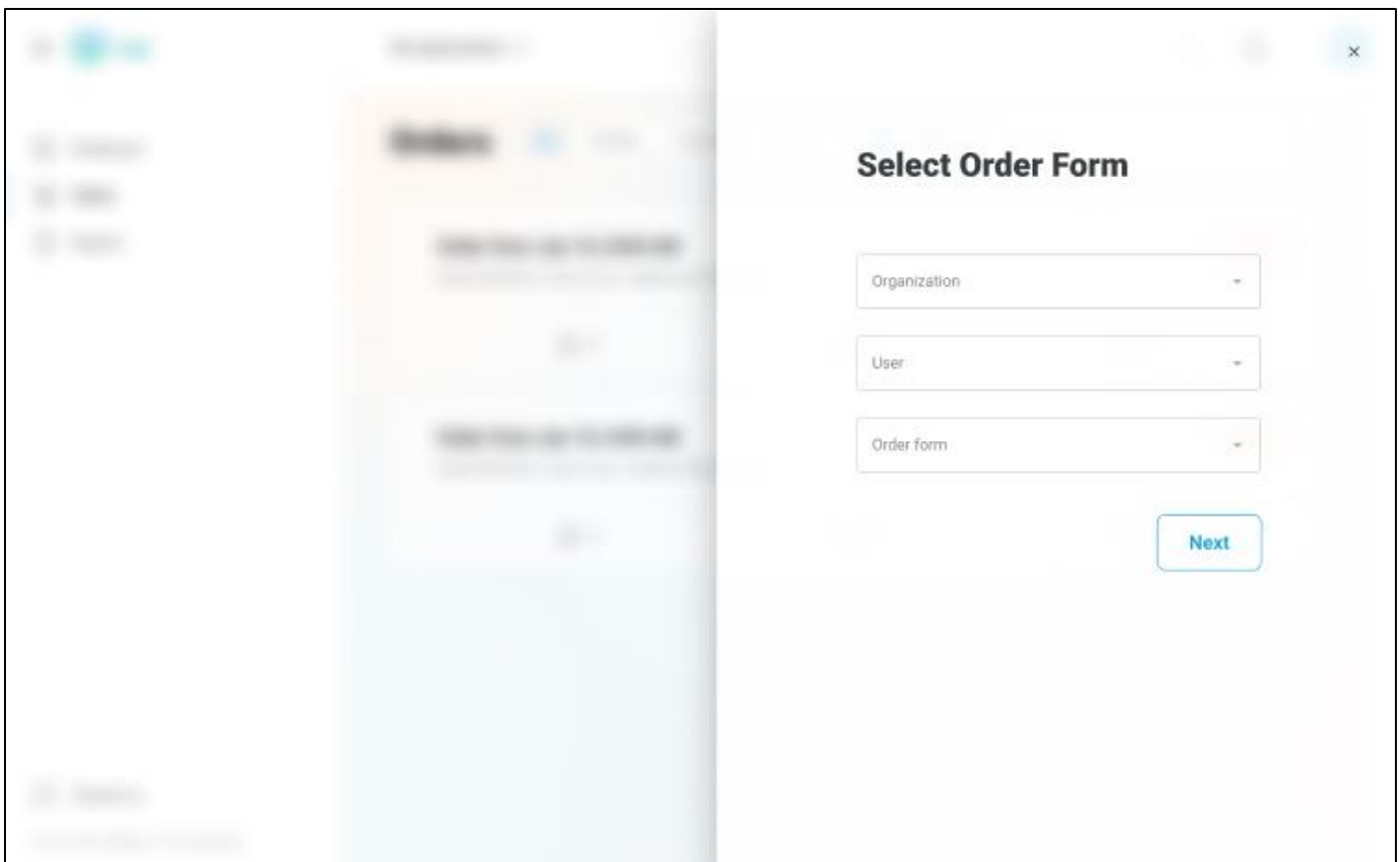




You need to have at least the *Manage own orders* permission for creating orders. Otherwise, buttons will be hidden for you.

The **Create Order** wizard consists of several steps.

Step 0 – Select organization, owner, order form



First of all, it is needed to understand for which organization, for which owner, and according to which order form to create an order. For this purpose, the zero step of the wizard is used.

It may look different depending on your permissions.

- If you chose any organization in the header of the screens, this organization will be selected by default.



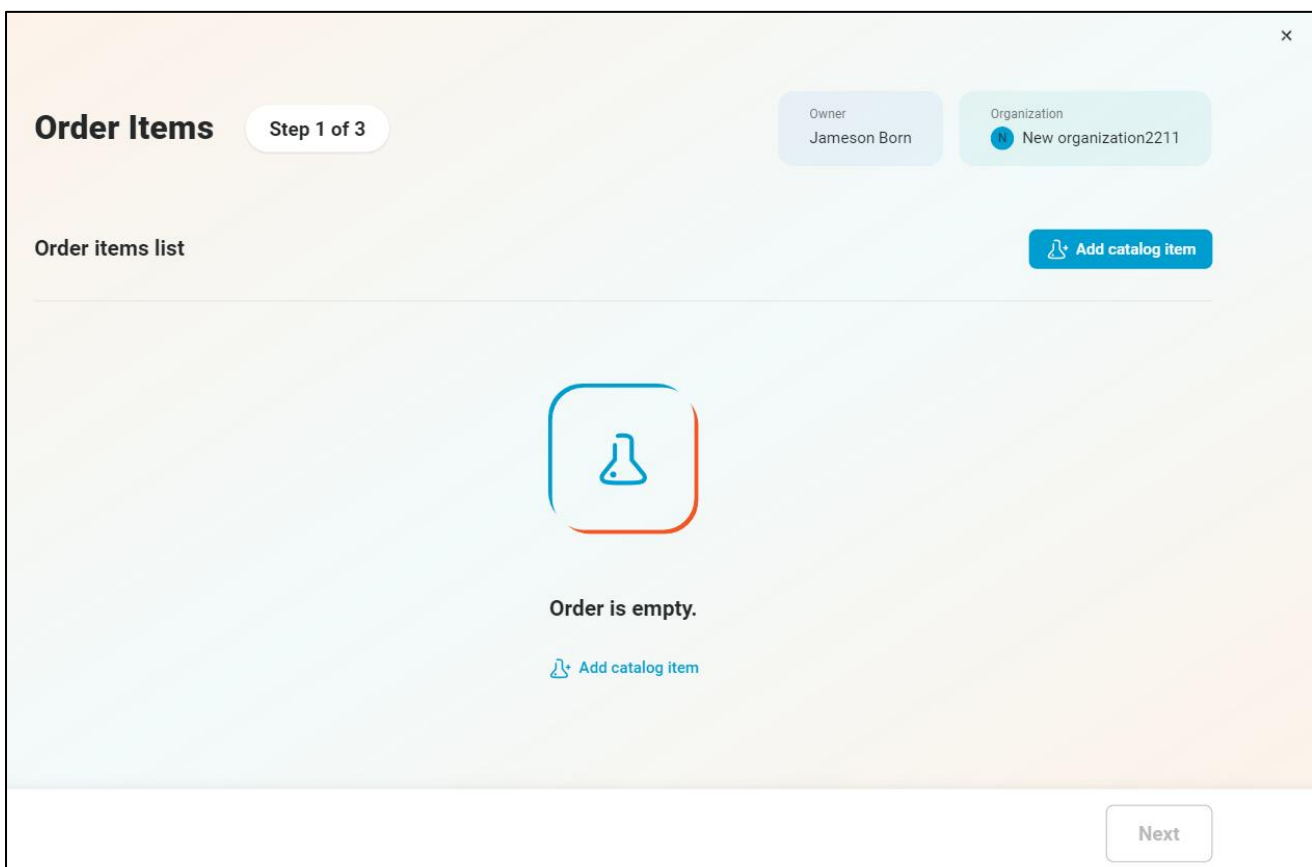
- If you are a member of 1 organization, it will be selected and it cannot be changed.
- If you are a member of several organizations, you will see all active organizations you are associated with. Select one of them to create a new order.
- If you can create orders only for yourself, you will be selected as the order owner and it cannot be changed. If you have the *Manage consumer's orders* permission in the selected organizations, you will be able to choose yourself or other users as the order owner. You can see all active members of the selected organization. Type to search for needed users.

Then, you need to select an order form – the “template” for future order. The order form should be active and should be associated with the selected organization. If only 1 order form is available, it will be chosen and it cannot be changed. If several order forms are available, you can pick up one of them.

Click the **Next** button to continue the order creation.

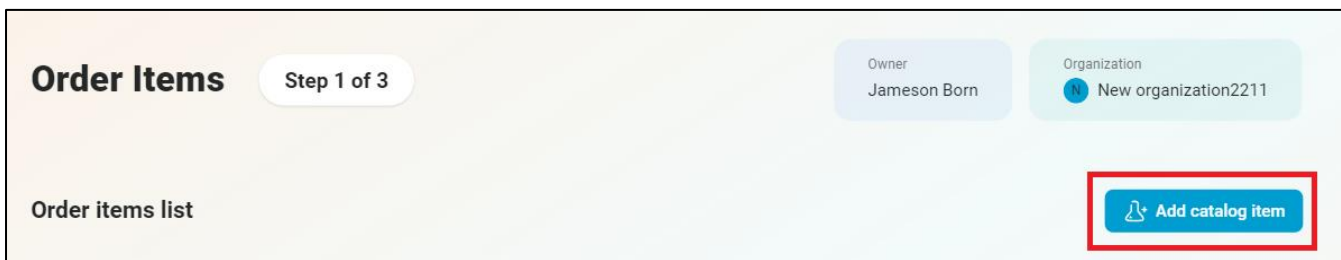
If you are a member of only 1 organization that contains 1 order form and you can create orders only for yourself, step 0 will be skipped.

Step 1 – Order items

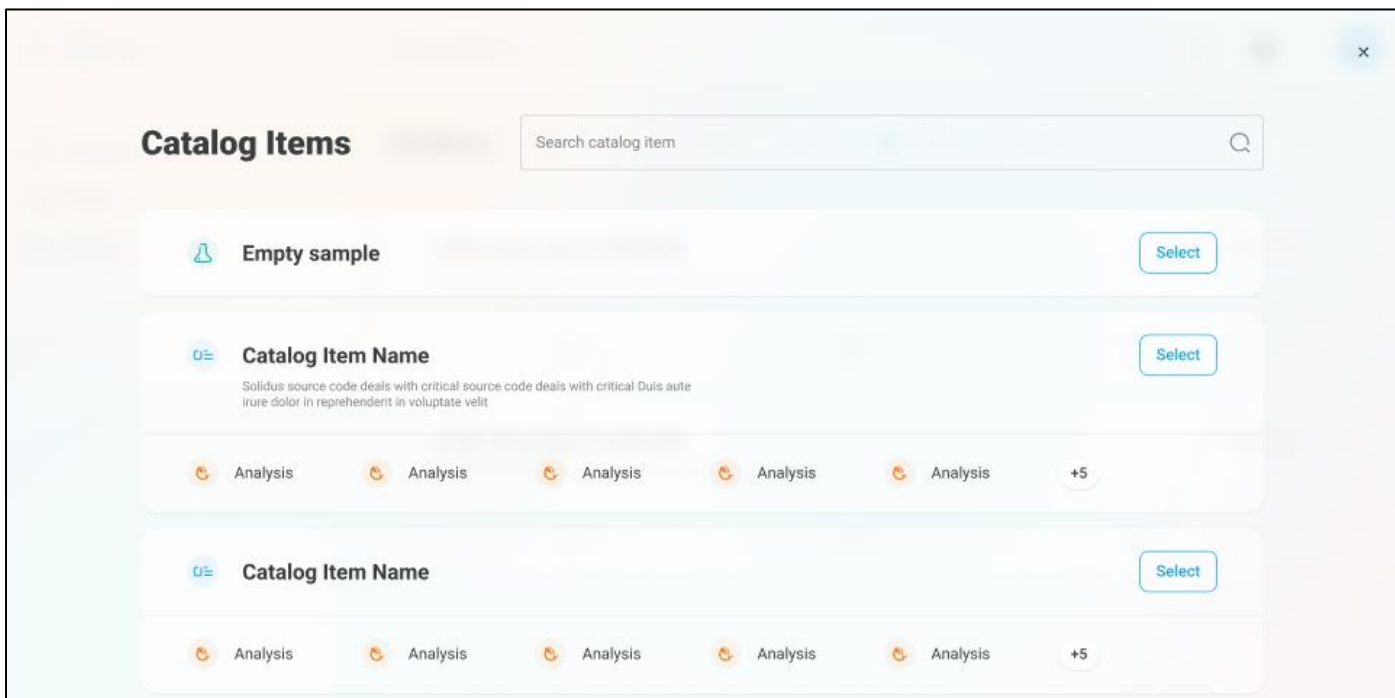


On step 1 of the wizard, you can select which items should be ordered with which analyses.

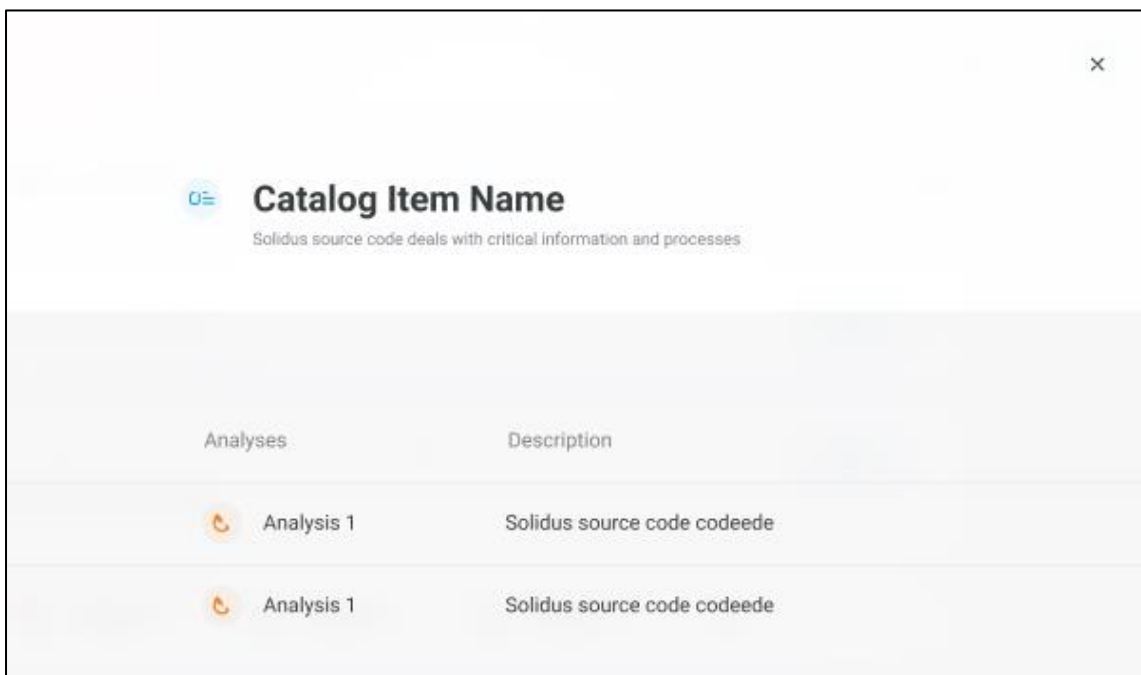
At the top of the screen, you will see the Order owner name and the Organization title. Some catalog items can be added by default if it is configured for this order form. Click the **Add catalog item** button to choose one of available for ordering samples.



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



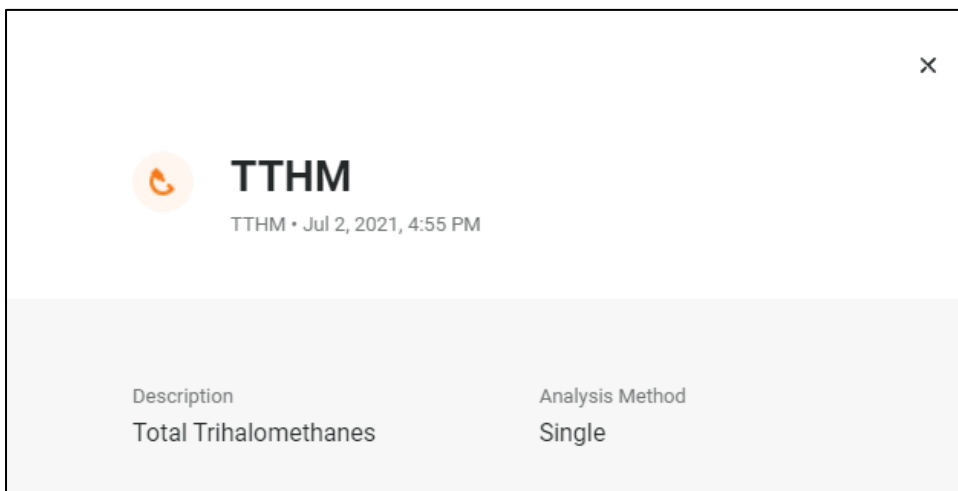
On this screen, you can see the list of samples with analyses that can be ordered. Every sample card contains the catalog item name and the list of analyses included in the sample. You can click on any catalog item to open its details – **Catalog Item Details** screen.



Catalog item name, description, analyses with names and descriptions will be shown.

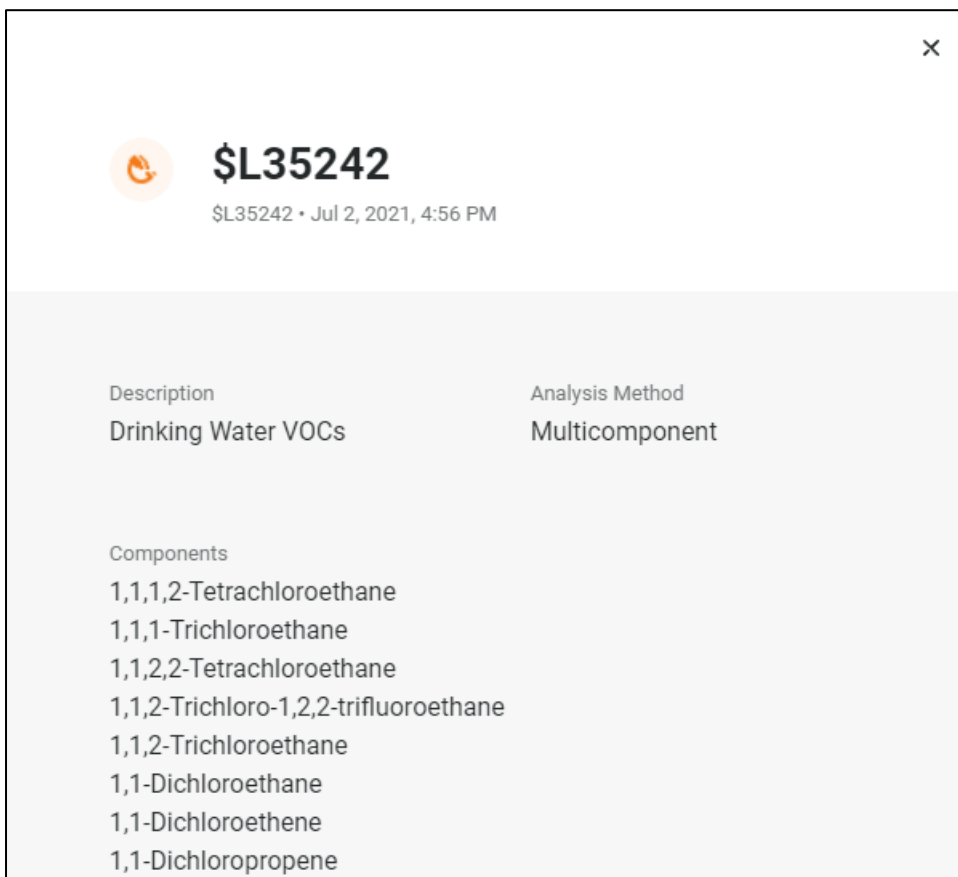
Click on any analysis to open the **Analysis Details** dialog.

This dialog may differ for different analysis types.



The screenshot shows a dialog box with a close button (X) in the top right corner. On the left is a circular icon with a flame. To its right, the text reads "TTHM" in large bold letters, followed by "TTHM • Jul 2, 2021, 4:55 PM" in smaller text. Below this, there are two columns: "Description" with the value "Total Trihalomethanes" and "Analysis Method" with the value "Single".

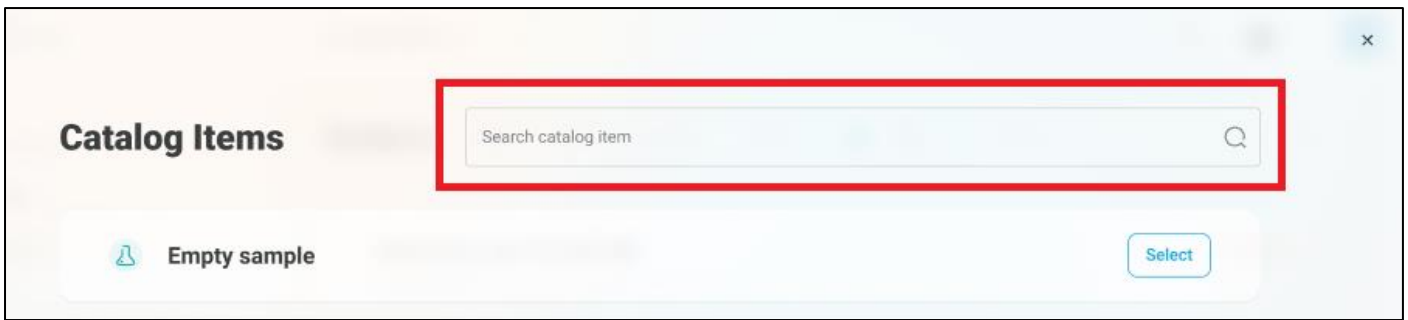
For single and narrative analyses, you will see just the analysis name, description, analysis method, analysis code, and the creation date.



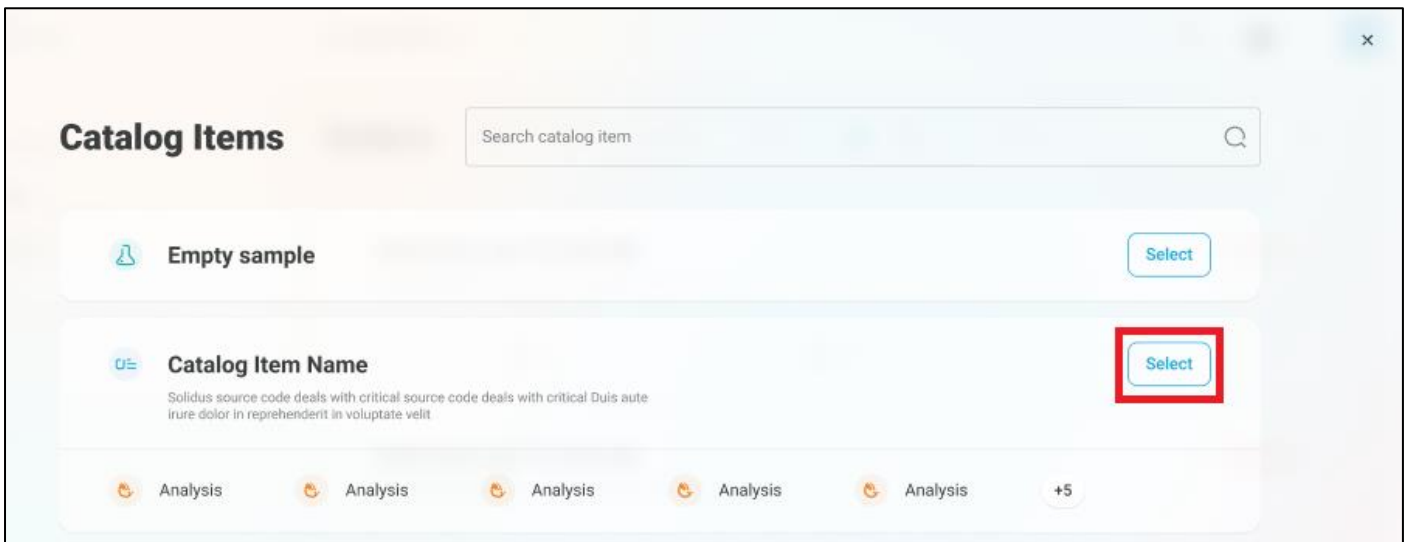
The screenshot shows a dialog box with a close button (X) in the top right corner. On the left is a circular icon with a flame. To its right, the text reads "\$L35242" in large bold letters, followed by "\$L35242 • Jul 2, 2021, 4:56 PM" in smaller text. Below this, there are two columns: "Description" with the value "Drinking Water VOCs" and "Analysis Method" with the value "Multicomponent". Underneath these columns is a section titled "Components" followed by a list of chemical names: "1,1,1,2-Tetrachloroethane", "1,1,1-Trichloroethane", "1,1,2,2-Tetrachloroethane", "1,1,2-Trichloro-1,2,2-trifluoroethane", "1,1,2-Trichloroethane", "1,1-Dichloroethane", "1,1-Dichloroethene", and "1,1-Dichloropropene".

For multicomponent analyses, you will also see the list of components in them.

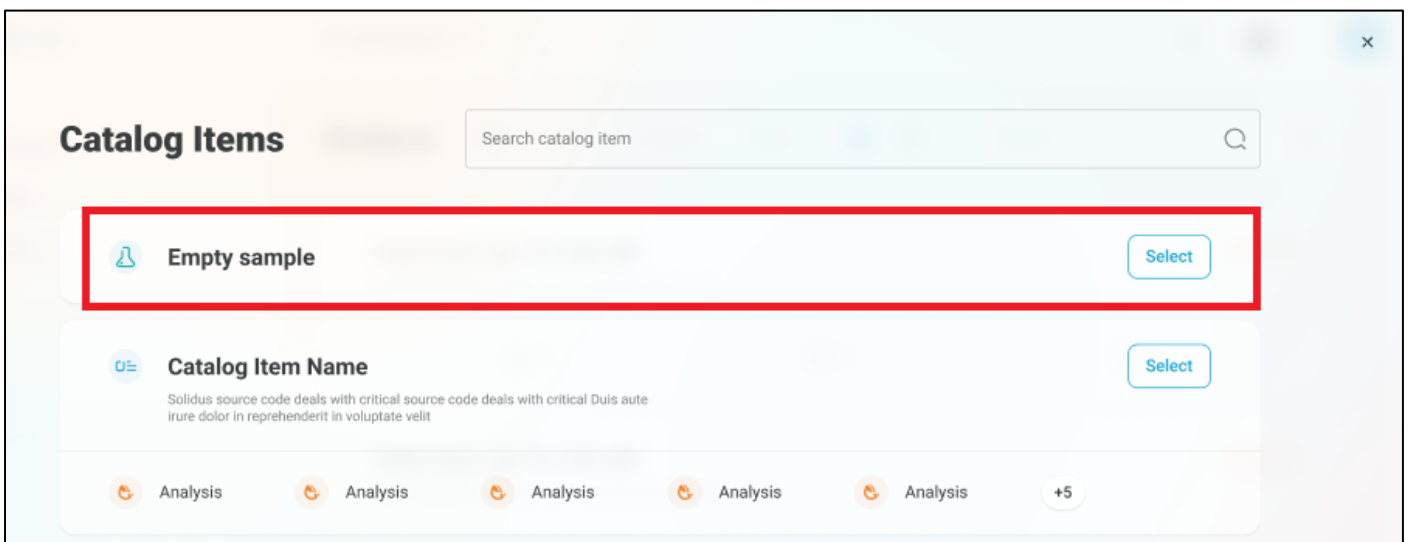
To quickly find a needed sample, the search can be used. Type the name if you know it and press Enter or wait for a second.



Click the **Select** button to add a needed sample to your order.



If you did not find the item you want, you can add an empty sample and fill it with additional information according to your needs.



When you select any sample, it will be added to the order, and you will see it on Step 1 of the **Create Order** wizard. Every ordered item contains general information at the left side and analyses list at the right side.

Order Items

Step 1 of 3

Owner: Anna Smith | Organization title: Pine Apple

Order items list

[Add catalog item](#)

Sample description: description

[Attach](#)

LW.png

14-1-163
BOD
pH x
Single inside a group
TSS

Analyses [Add analysis](#)

Add a comment to a sample if needed.

Click the **Attach** button to attach files from your computer or device.

Sample description: description

14-1-163

BOD

pH x

Attach

LW.png

To remove an attachment, click the **X** button.

Sample description: description

14-1-163

BOD

pH x

[Attach](#)

LW.png

On the right, the catalog item name and analyses are displayed.

You can click on any analysis to open its details.

Sample description: description

14-1-163

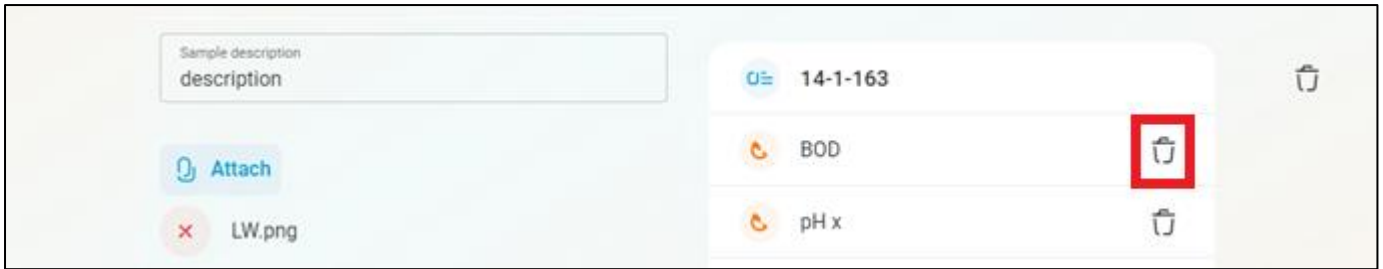
BOD

pH x

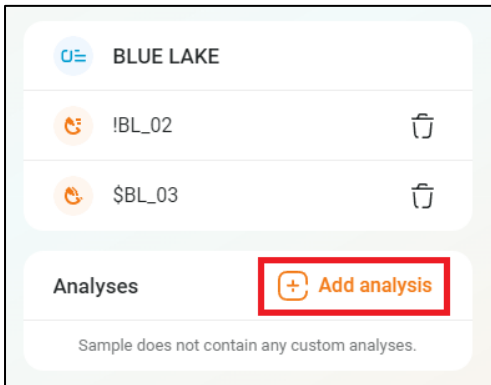
[Attach](#)

LW.png

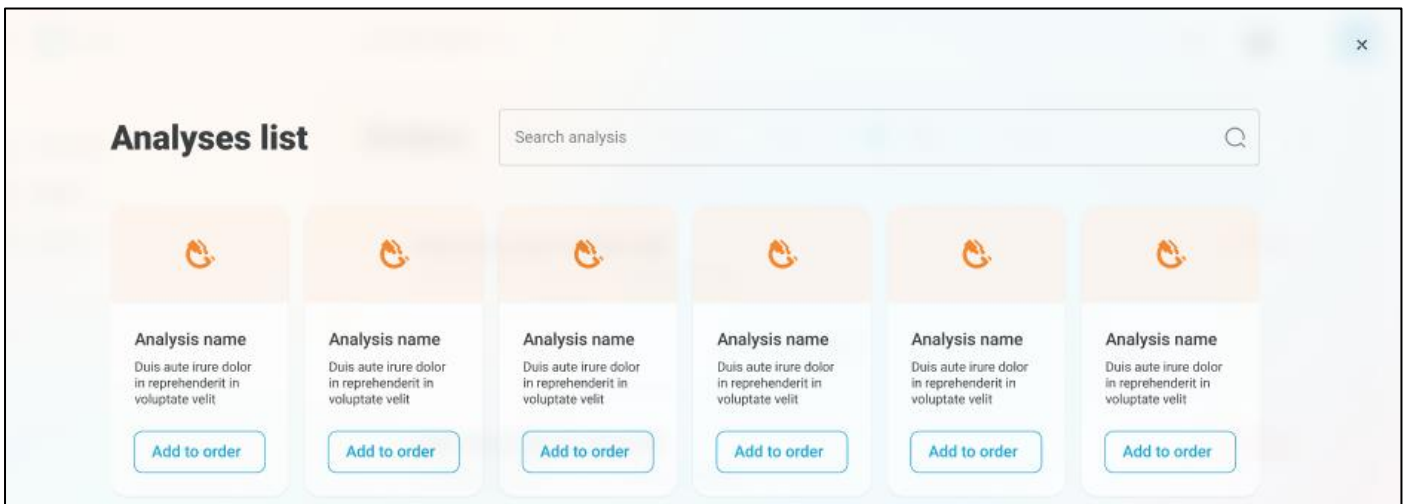
Also, you can remove analyses one by one by clicking the **trash** icon.



In addition to the analyses included in samples, you can add your custom analyses. Custom analyses are displayed in a separate section below the section with predefined analyses. Click the **Add analysis** button to add a new item.

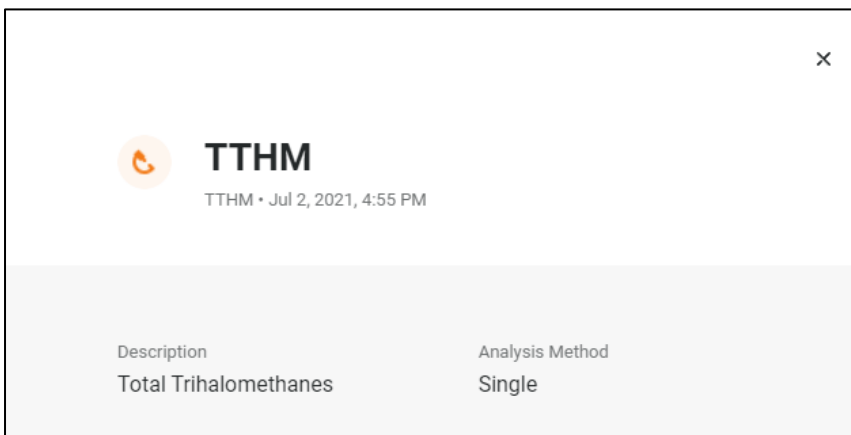


The **Analyses list** dialog will be open.

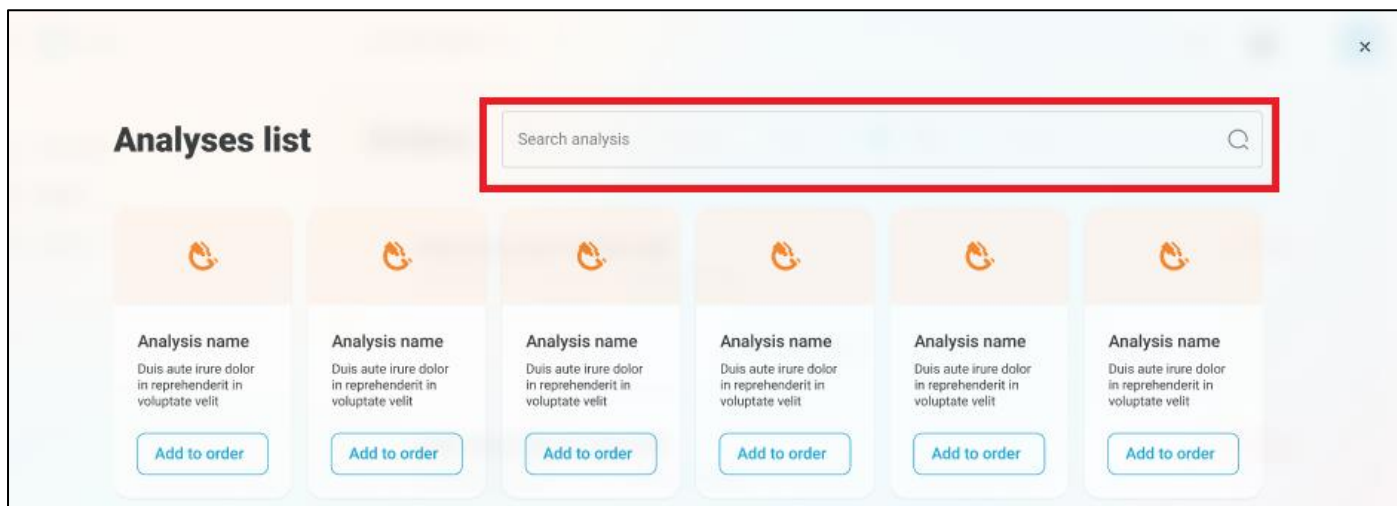


Here you can see the list of all analyses that can be ordered based on this order form with their names and descriptions.

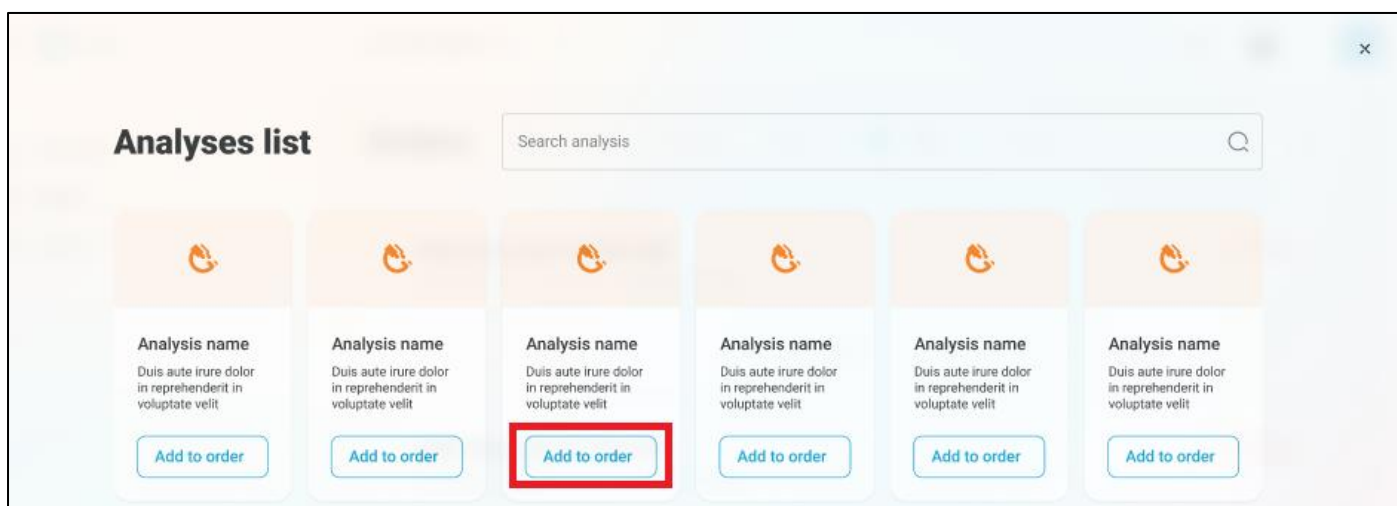
Click on any analysis to open its details.



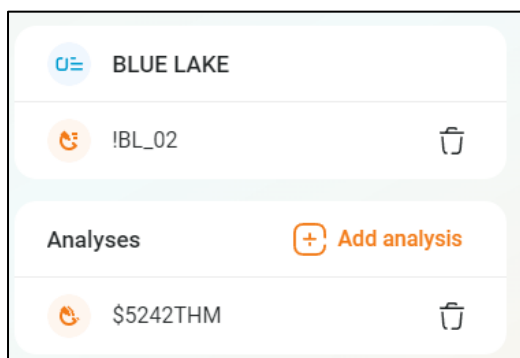
Use the search to quickly find a needed analysis. Type the name if you know it and press Enter or wait for a second.



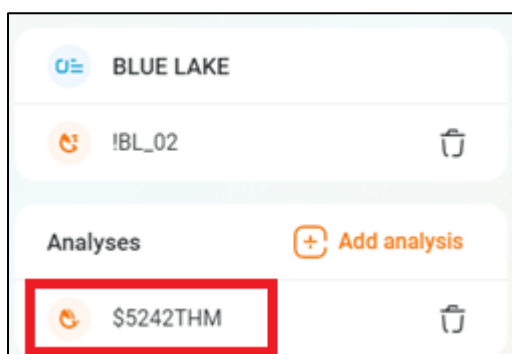
Click the **Add to order** button to add an analysis as a custom item.



When custom analyses are added, you can see them below the general analyses.



Click on a row to open analysis details.



Click on the **trash** icon to remove an analysis from the order.

The screenshot shows a sample card for 'BLUE LAKE'. It contains an analysis entry 'S5242THM' with a trash icon next to it, which is highlighted with a red box. Above it is another analysis 'IBL_02' with a trash icon. Below the analyses is an 'Add analysis' button. The card also has an 'Attach' button and a file 'LW.png'.

Also, the whole sample can be removed from the order. Just click the **trash** icon for an item.

The screenshot shows a sample card for '14-1-163'. It contains a list of analyses: 'BOD', 'pH x', 'Single inside a group', and 'TSS', each with a trash icon. A trash icon for the entire sample card is highlighted with a red box. The card also has a 'Sample description' field with the text 'description', an 'Attach' button, and an 'Add analysis' button.

If you added an empty sample, it does not contain a catalog item name and analyses. You need to add custom analyses manually or describe what you want to be done in the laboratory as a Sample description. Add analyses, comments and/or attachments so that the laboratory can understand exactly what tests need to be done.

The screenshot shows an empty sample card. The 'Sample description' field contains the text 'I need the following water tests: ...'. The 'Analyses' section is empty and contains the message 'Sample does not contain any custom analyses.' There is an 'Add analysis' button and an 'Attach' button.

If this was configured for the order form that was used to create the order, sample details fields will be displayed for every sample that you should or can fill in.

The screenshot shows a sample card with a 'Sample description' field containing 'Sample: description'. Below it is an 'Attach' button. The 'Analyses' section contains a custom analysis named 'custom name'. A 'Lot number' field is highlighted with a red box.

When all samples that you want to order are added, click the **Next** button to go to the next step.

Order Items Step 1 of 3

Owner: Anna Smith | Organization title: Demo Organization

Order items list

Sample description: I need the following water tests: ...

Analyses: Add analysis

Attach

Next

Step 2 – Order details

Order Details Step 2 of 3

Owner: Anna Smith | Organization: Pine Apple

Addresses

Report address: Add

Invoice address: Add

CC Addresses: Add

Details

Shipping information: drop-down new value

Previous step | Next

On the second step of the **Create Order** wizard, you can see and configure additional information for your order:

- Report address
- Invoice address
- CC addresses
- Additional information – Order details

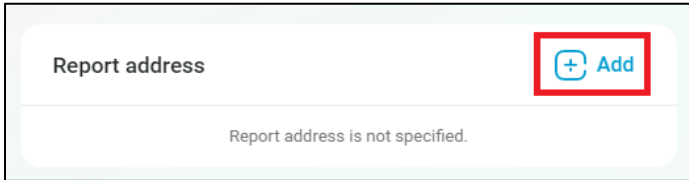
Configuration of this step depends on the order form and organization settings.

Can be configured so that 1, 2 or all 3 addresses are not requested for the selected order form. In that case, cards of these addresses (or the whole Addresses section) will be hidden.

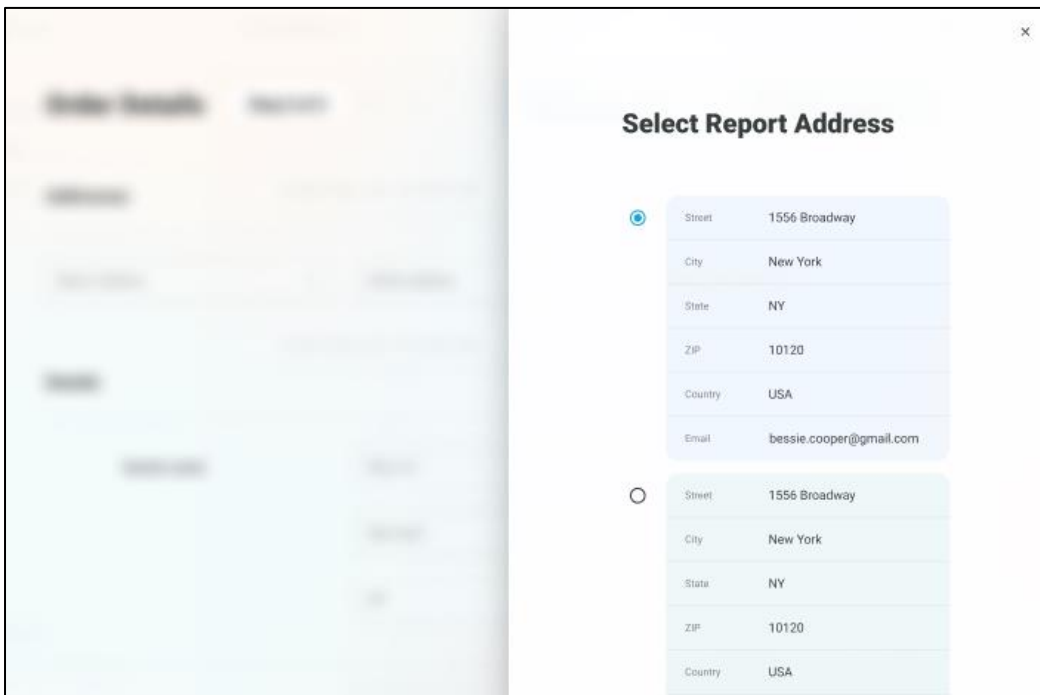
Report, invoice, and CC addresses will be sent to the laboratory and they will be used to send reports, invoices, and put the specified emails in the CC.

For some organizations, addresses can be selected by default. For some organizations, they cannot be changed by order creators.

If it is allowed to configure addresses, you can click the **Add** button to select one of the organization addresses.

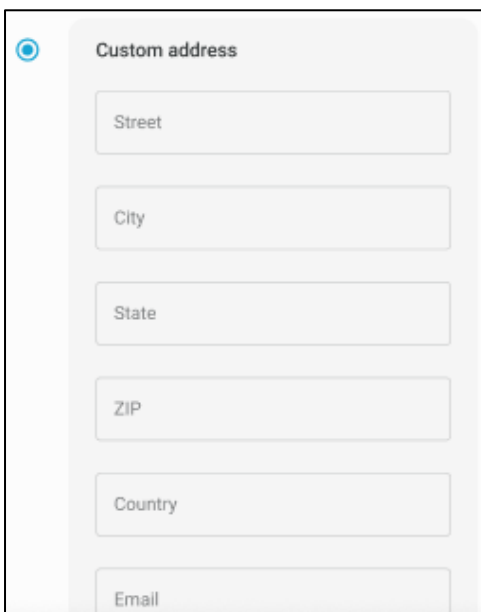


The **Select Report Address / Select Invoice Address** dialog will be open depending on which address you want to add.



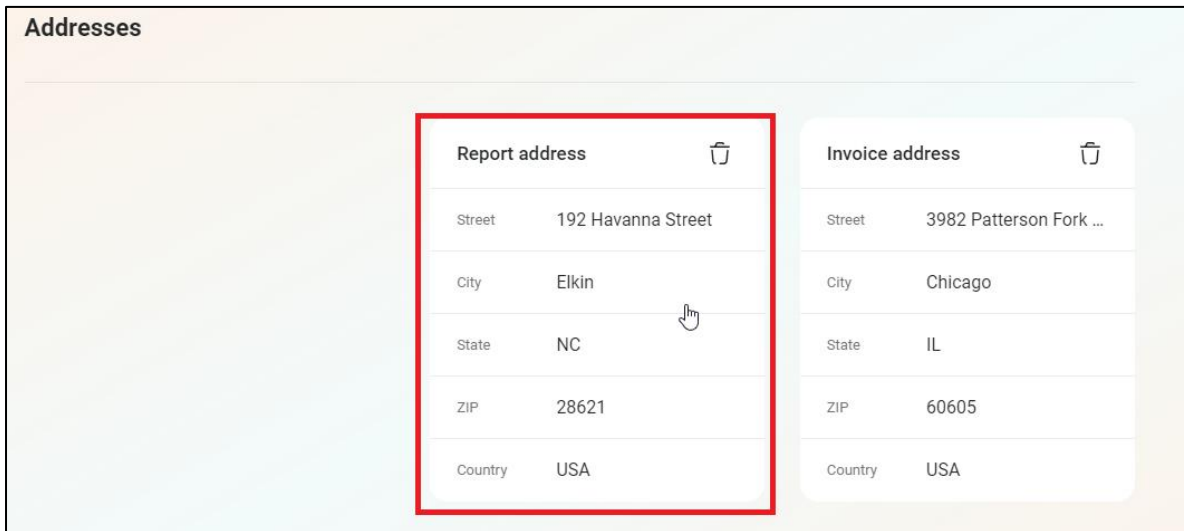
Click on any address card to select the item.

If it is allowed for the selected order form, you also can add your custom addresses.

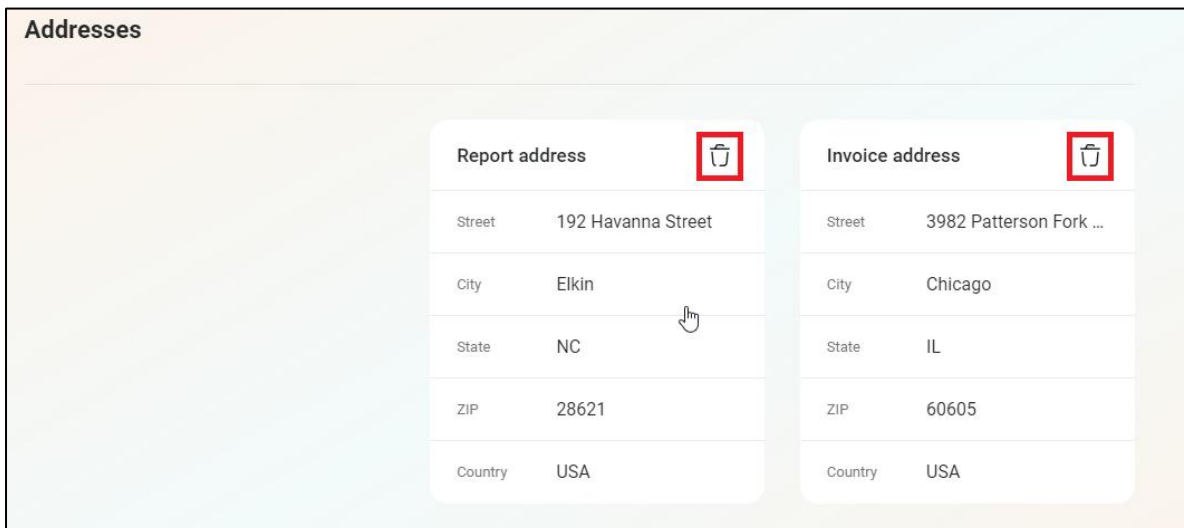


After clicking on the **Apply** button, the selected address will be added to the order.

If you changed your mind, click on an address to open the **Select...** dialog once again and choose another item.

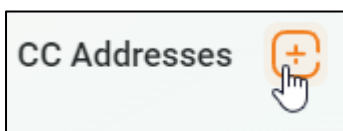


Click on the **trash** icon to remove the address from the order.

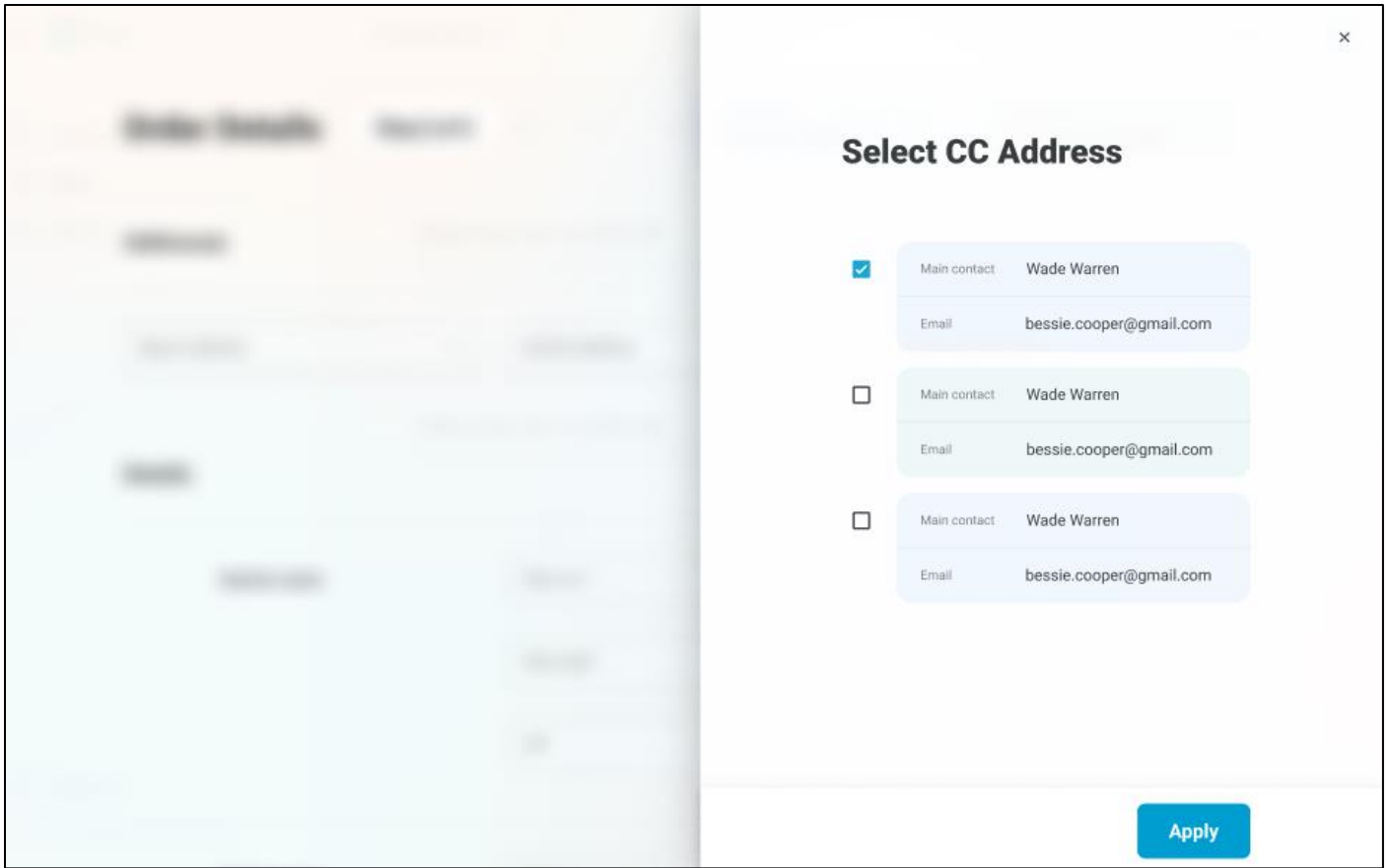


The same functionality is available for CC addresses, but several items can be added to orders.

Click the **plus** icon to add a new address.

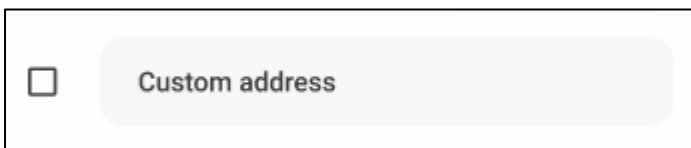


The **Select CC Address** dialog will be open.



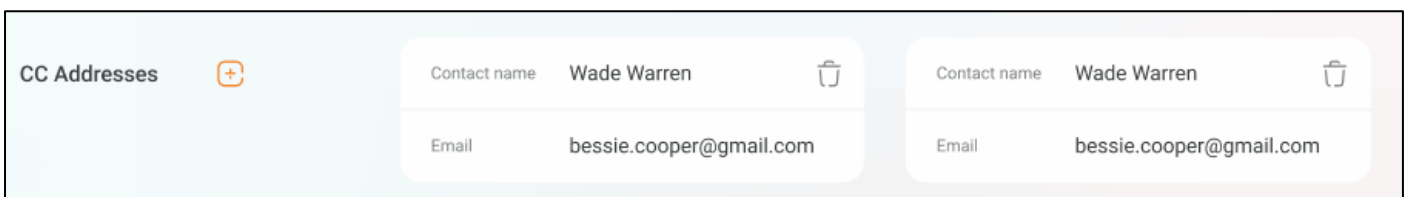
Use checkboxes to choose needed items.

If it is allowed, you also can add your custom CC addresses.



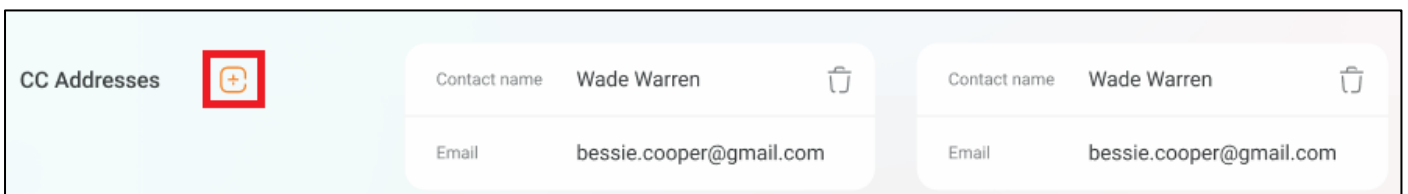
Click the **Apply** button to add addresses to the order.

Once CC addresses are added, you can see them on Step 2.






CC addresses are not clickable.

You can open the **Select CC Address** dialog once again by clicking the **plus** icon.



To remove an address from the order, click the **trash** icon.

CC Addresses 

Contact name	Wade Warren 	Contact name	Wade Warren 
Email	bessie.cooper@gmail.com	Email	bessie.cooper@gmail.com

In addition to addresses, this step may contain some sections with additional order parameters – **Details**.

Details

Section name	Ship via *
	Ship date*
	ZIP

Section name	Ship via	Ship via
--------------	----------	----------



Some fields may be mandatory and you should fill them. Some fields may be optional and you can leave them empty. This depends on the order form you chosen.

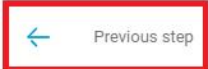

Click the **Previous step** button to return to step 1 if needed.

Order Details Step 2 of 3

Owner Jameson Born Organization title Pine Apple

Addresses

Report address 		Invoice address 	
Street	192 Havanna Street	Street	3982 Patterson Fork ...
City	Elkin	City	Chicago
State	NC	State	IL

Click the **Next** button to continue order creation.

Order Details

Step 2 of 3

Owner: Jameson Born

Organization title: Pine Apple

Addresses

Report address		Invoice address	
Street	192 Havanna Street	Street	3982 Patterson Fork ...
City	Elkin	City	Chicago
State	NC	State	IL

← Previous step

Next

Step 3 – Review order

Review Order

Step 3 of 3

Order form: Order form name

Organization: Apache Foundation

Addresses

Report Address	Invoice Addresses	CC Address
Street: 1556 Broadway	Street: 1556 Broadway	Contact name: Wade Warren
City: New York	City: New York	Contact name: Bessie Cooper
State: NY	State: NY	
ZIP: 10120	ZIP: 10120	
Country: USA	Country: USA	
Email: bessie.cooper@gmail.com	Email: bessie.cooper@gmail.com	

Order Items list

Sample name: Solidus source code deals with critical information and processes, like collecting users information or submitting payments using credit cards. We know that no technology is perfect, and we believe that working with skilled security researchers across the globe is crucial in identifying weaknesses in any technology. If you believe you've found a security issue in our platform, we encourage you to notify us.

Filename.pdf

Details:

Section name: Label: Ship via

Input label: Ship date

← 2 step

Save as Draft | **Submit order**

On the last step of the **Create Order** wizard, you can review all the order information:

- Report, invoice, CC addresses
- List of ordered samples with their description, attachments, sample fields, and analyses in them
- Order details

You can see all the data that the order will have and review it before sending to the laboratory. It is available to return to previous steps by clicking the **Previous step** button.

The screenshot shows the 'Review Order' interface at Step 3 of 3. At the top, it displays 'Review Order' and 'Step 3 of 3'. On the right, there are two summary boxes: 'Owner Jameson Born' and 'Organization title Pine Apple'. Below this is the 'Addresses' section, which is divided into three columns: 'Report address', 'Invoice address', and 'CC addresses'. The 'Report address' column contains 'Street: 192 Havanna Street', 'City: Elkin', and 'State: NC'. The 'Invoice address' column contains 'Street: 3982 Patterson Fork R...', 'City: Chicago', and 'State: IL'. The 'CC addresses' column contains two dropdown menus for 'Contact name', with the first set to 'Contact' and the second to 'Douglas V. Jacks...'. At the bottom of the form, there are three buttons: 'Previous step' (with a left arrow icon, highlighted by a red box), 'Save as draft', and 'Submit'.

If you are not sure and plan to continue working on the order, click the **Save as draft** button. The order will be saved as a draft and the laboratory will not know about that. You can open the order for editing or submit it any time you want. See more information in the Order Details section of this document.

This screenshot is identical to the one above, showing the 'Review Order' interface at Step 3 of 3. In this version, the 'Save as draft' button at the bottom is highlighted with a red box, while the 'Previous step' button is no longer highlighted.

If you are sure that everything is right, you can submit the order and send it to the laboratory. Click the **Submit** button.



Review Order

Step 3 of 3

Owner
Jameson Born

Organization title
Pine Apple

Addresses

Report address	
Street	192 Havana Street
City	Elkin
State	NC

Invoice address	
Street	3982 Patterson Fork R...
City	Chicago
State	IL

CC addresses	
Contact name	Contact ▼
Contact name	Douglas V. Jacks... ▼

← Previous step

Save as draft

Submit

Order Details

The screenshot shows the 'Order Details' page for Order CP-1557, created on Jan 10, 8:00 AM. The page has a header with 'Print labels' and a close button. Below the header, the order title 'Order CP-1557 from Jan 10, 8:00 AM' is displayed, along with the creator 'Nick Born' and the last modified date '08/10/2021, 8:00 AM'. A navigation bar includes 'Ordered items', 'Order details', 'Discussions', 'Attachments', and 'Results'. The main content area has 'Collapse all' and 'Expand all' buttons. The 'Ordered items' section shows a 'Submitted' status, a 'Sample ID' dropdown, and '23 analyses'. A text block describes the source code and security. Below this, a table lists 'Date field' (1/14/2022) and 'Lot number' (15482), followed by a 'Comment' field with placeholder text. At the bottom, a table lists 'Analysis name' and 'Analysis description' with two rows of 'Analysis' and 'Description'.

The **Order Details** screen can be open by clicking on any order in the Orders List or after the order creation.

It displays all information about the order. At the header part, the order status, order number, creation date, creator full name, and the last modified date are shown.

Orders can have the following statuses:

- 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. It means that the laboratory onboarded the order and it cannot be edited anymore.
- Completed – When all samples in the order have the portal Completed status. The order is considered completed in the laboratory.


To print all order samples with barcodes, click the **Print labels** button. It will not be displayed for orders with the Draft status.

In progress Print labels ... X

Order ORD-194 from Feb 16, 2022, 3:09 PM

Created by: Jameson Born • Last modified: Feb 16, 2022, 3:15 PM

The pdf file will be downloaded on your computer or device.


Order number: ORD-194 

Order created date: February 16, 2022 Number of Samples : 2

Order owner: Anna Smith	Organization: Pine Apple	Order created by: Jameson Born	Contact phone: +16183450856
----------------------------	-----------------------------	-----------------------------------	--------------------------------


Contact email:
anna.smith68@outlook.com

Sample: ORD-194-1



51ca1f18-2521-4120-ae52-347b2baa9083

Sample: ORD-194-2



aa5b8fc4-1724-4527-8cc7-c98d119f1028

For orders with the Draft status, the **Submit order** button is displayed. You can click on it if you are ready to submit the order and send it to the laboratory. If you are the order owner, you need to have the *Manage own orders* permission in the order organization to submit orders. If you are not the order owner, you need to have the *Manage consumer's orders* permission to manage orders of your organizations.

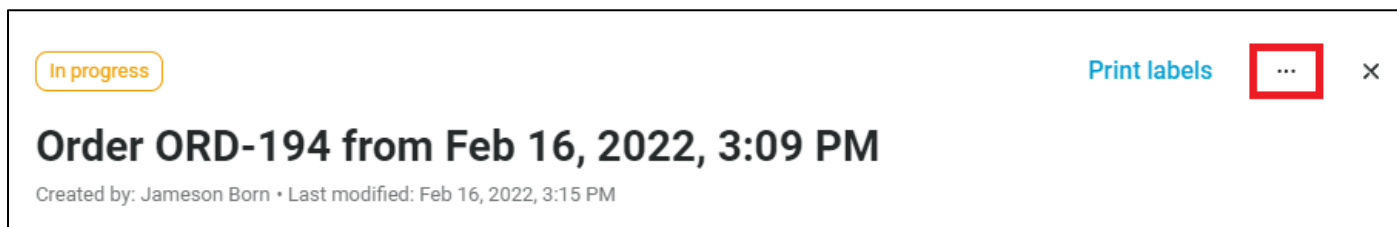
Draft Submit order ... X

Order ORD-198 from Feb 22, 2022, 2:20 PM

Created by: Jameson Born • Last modified: Feb 22, 2022, 2:20 PM

Step 3 – Review order of the **Create Order** wizard will be open; you can review all the order information and submit it. Or you can return to previous steps and make changes. Also, you can save the order as a draft. See the detailed information in the corresponding section of this document.

Click the “...” menu icon to open the menu and see other operations that can be done with an order.



In progress

Print labels

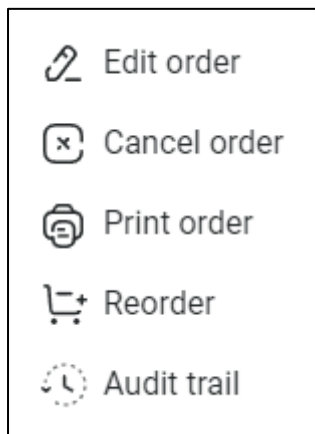
...

×

Order ORD-194 from Feb 16, 2022, 3:09 PM

Created by: Jameson Born • Last modified: Feb 16, 2022, 3:15 PM


The list of menu options depends on the order status and your permissions.









- Edit order
- Cancel order
- Print order
- Reorder
- Audit trail

- **Edit order** – Orders with the Draft or Submitted statuses can be edited. Click on this option and the **Edit Order** wizard will be open. See the description below. If you are the order owner, you need to have the *Manage own orders permission* in the order organization to edit orders. Please note that orders with the Submitted status are already available for the laboratory and there can be conflicts when you edit them. Orders with In Progress and Completed statuses cannot be edited anymore.
- **Cancel order** – Orders with the Draft or Submitted statuses can be canceled. Submitted orders will receive the Draft status and will disappear from LIMS. Draft orders will be completely removed from the portal. If you are the order owner, you need to have the *Manage own orders permission* in the order organization to cancel orders. Please note that orders with the Submitted status are already available for the laboratory and there can be conflicts when you cancel them.
- **Reorder** – You can copy any existing order (except drafts) by selecting this menu option. The **Create Order** wizard will be open from Step 1 and all information will be copied from the parent order. If you are the order owner, you need to have the *Manage own orders permission* in the order organization to reorder orders.

- **Print order** - This operation allows all users that can see the order to print its details. The pdf file with all order information will be downloaded to your computer or device.

Order number: ORD-194		Order status: In progress		
Order created date: February 16, 2022			Number of Sample:2	
Order owner: Anna Smith	Organization: Pine Apple	Order created by: Jameson Born	Contact phone: +16183450856	
Contact email: anna.smith68@outlook.com				
Invoice address: 3982 Patterson Fork Road, Chicago, IL 60605 USA			Report address: 192 Havanna Street, Elkin, NC 28621 USA	
Shipping information				
drop-down:			PO number: CP-001	
Do you agree to be notified by email?: false				

- **Audit trail** – Users with the *View audit trails* permissions can see the records of all order updates on the **Audit Trail** dialog.

Changed item	Description	Previous value	New value	Modified date	Changed by
Consent to view results			Received	Apr 4, 2022, 3:49 P...	 Jameson ...
Consent to view results			Received	Apr 4, 2022, 3:49 P...	 Anna Smith
Results report	Report for ORD-241-1		crystal-results-atta...	Apr 4, 2022, 3:48 P...	 Annette C...
Order attachment	Attachment removed	1.jpg		Apr 4, 2022, 3:47 P...	 Anna Smith
Order attachment	Attachment added		1.jpg	Apr 4, 2022, 3:46 P...	 Anna Smith
Discussion message	Message from Anna Smith		I need help with th...	Apr 4, 2022, 3:44 P...	 Anna Smith

The **Audit trail** dialog shows all audit trails about order modifications:

- Order creation

- Order status changes
- Attachments list changes
- Samples, analyses, sample properties updates
- Order details updates
- Addresses changes
- New messages in discussions
- Sample status changes
- Results
- Results reports
- Consent to view results by users (if it is requested)

The **Order Details** dialog is divided into several tabs.

Ordered Items tab

The screenshot displays the 'Ordered Items' tab within a software interface. At the top, there are navigation tabs: 'Ordered items' (selected), 'Order details', 'Discussions', 'Attachments', and 'Results'. Below the tabs, there are two buttons: 'Collapse all' and 'Expand all'. The main content area shows a list of ordered items. The first item is highlighted and includes a 'Submitted' status label, a 'Sample ID' dropdown menu, a '23 analyses' indicator, and a detailed description: 'Solidus source code deals with critical information and processes, like collecting users information or submitting payments using credit cards. We know that no technology is perfect, and we believe that working with skilled security researchers across the globe is crucial in identifying weaknesses in any technology. If you believe you've found a security issue in our platform, we encourage you to notify us.' Below this, there are columns for 'Date field' (1/14/2022) and 'Lot number' (15482). A 'Comment' field contains the text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt'. At the bottom, there is a table with columns for 'Analysis name' and 'Analysis description', showing two rows of 'Analysis' items.

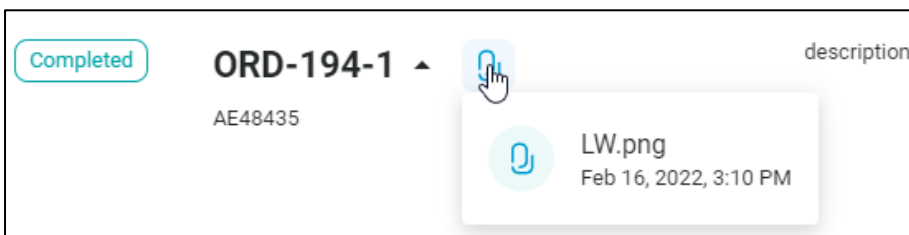
On this tab, the list of ordered samples with their analyses is displayed. Here it is shown what was ordered on the portal from the laboratory by the order creator/editor.

You can see the following sample data:

- Status
 - Draft – When the order is in the Draft status.

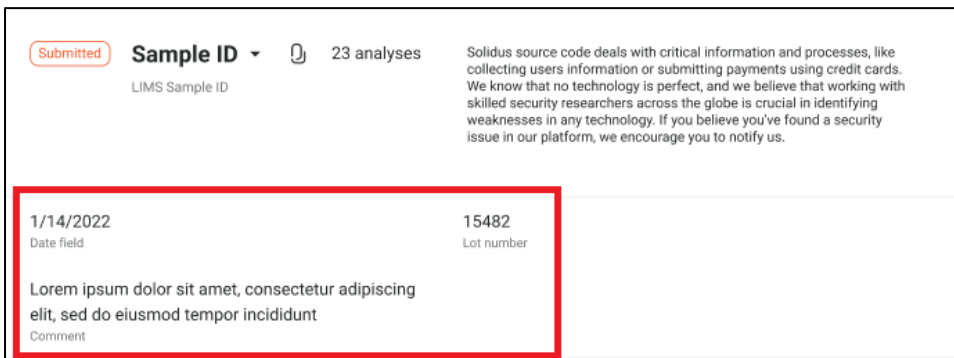
- Submitted – If the order status is Submitted and the laboratory has not onboarded this sample yet.
 - Received – The sample is received by the laboratory.
 - In progress – The laboratory is working on it.
 - Completed – The work on this sample is finished.
- Sample ID
 - LIMS sample ID
 - Clip icon if the sample contains attachments
 - Sample comments
 - Number of analyses in the sample

Hover the mouse over the **clip** icon to see the list of sample attachments with their names and creation dates.



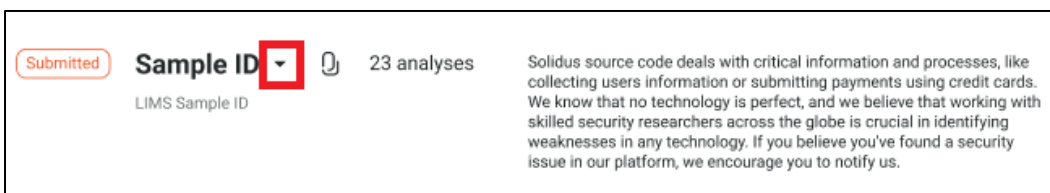
Click on a file to download it to your computer or device.

If this was configured for the order form that was used to create the order, sample details fields can be displayed for each sample with the values entered by consumers when creating or editing the order.



For every sample the list of analyses with their names and descriptions is displayed.

You can expand or collapse the table of analyses by clicking the **arrow** icon for a specific sample.



Or you can expand or collapse all the lists of analyses for all samples in the order by clicking the **Expand all / Collapse all** buttons at the top of the screen.

Collapse all

Expand all

Submitted

Sample ID ▾



23 analyses

LIMS Sample ID

Solidus source code deals with critical information and processes, like collecting users information or submitting payments using credit cards. We know that no technology is perfect, and we believe that working with skilled security researchers across the globe is crucial in identifying weaknesses in any technology. If you believe you've found a security issue in our platform, we encourage you to notify us.

Order Details tab

Ordered items

Order details

Discussions

Attachments

Results

Organization

 Apache Foundation

Creator

 Wade Warren

User's full name

 Wade Warren

User's telephone

(480) 555-0103

Addresses

Report Address

Street 1556 Broadway

State NY

City New York

ZIP 10120

Country USA

Email bessie.cooper@gmail.com

Invoice Addresses

Street 1556 Broadway

State NY

City New York

ZIP 10120

Country USA

Email bessie.cooper@gmail.com

CC Addresses

Contact n... Bessie Cooper

Email bessie.cooper@gmail.com

Contact n... Bessie Cooper

Email bessie.cooper@gmail.com

Order form

Section name

Input label

Are you considering

On this tab, you can see the general order information:

- Organization, creator, order owner name, order owner phone number.
- Report, invoice, CC addresses.
- Additional order details.


The tab structure depends on the order form.

Users with the *View hidden fields* permission in the order organization can also see fields hidden from other consumers.

Discussions tab











Ordered items Order details **Discussions** Attachments Results



If you believe you've found a security issue in our platform, we encourage you to notify us. We welcome working with you to resolve the issue promptly.

 Wade Warren • Yesterday, 13:25

Solidus source code deals with critical information and processes, like collecting users information or submitting payments using credit cards. We know that no technology is perfect, and we believe that working with skilled security researchers across the globe is crucial in identifying weaknesses in any technology. If you believe you've found a security issue in our platform, we encourage you to notify

If you believe you've found a security issue in our platform, we encourage you to notify us. We welcome working with you to resolve the issue promptly. We welcome working with you to resolve the issue promptly We welcome working with you to reso

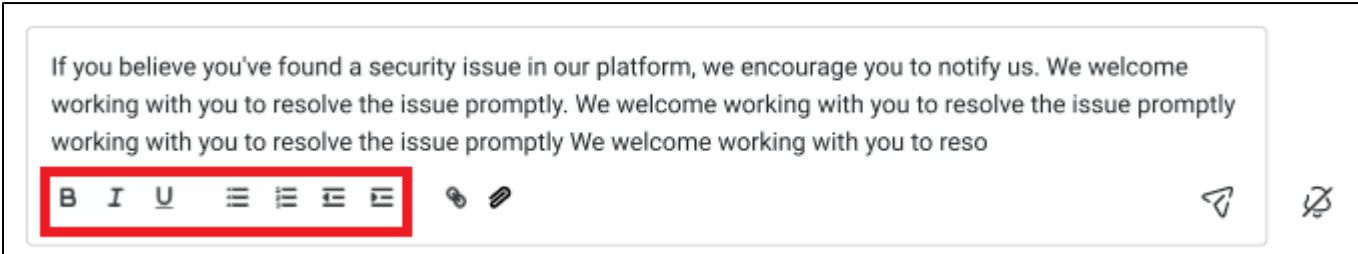
B *I* U          

 Filename.pdf  Filename.pdf

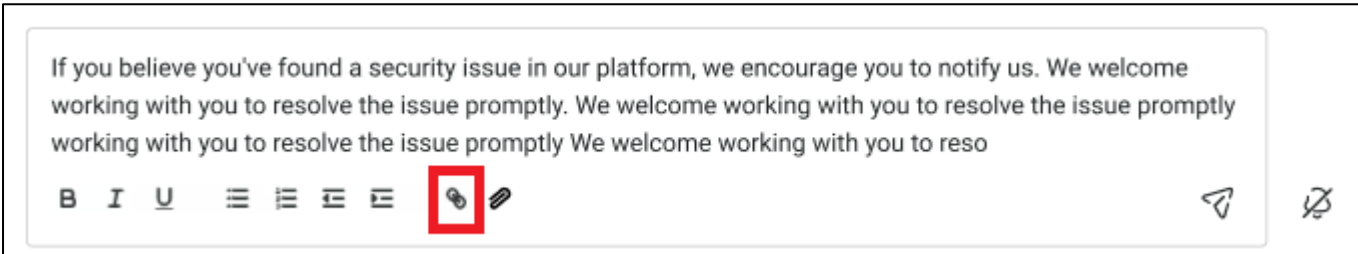
On the Discussions tab, you can ask and answer questions, add comments. Here you can discuss the order and ordered items with the laboratory, administrators, and other portal users.

You can type a message and use formatting:

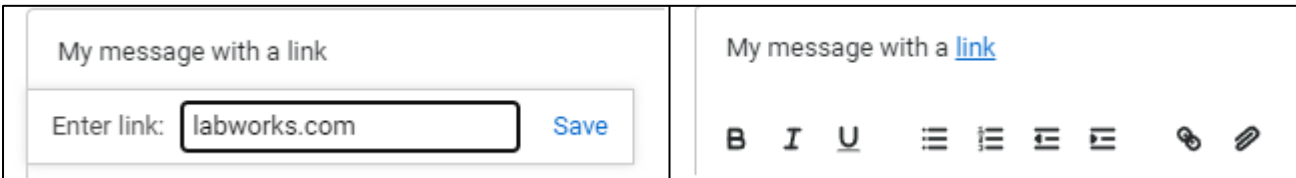
- Bold font
- Italic font
- Underlined
- Bulleted list
- Numbered list
- Decrease or increase indent



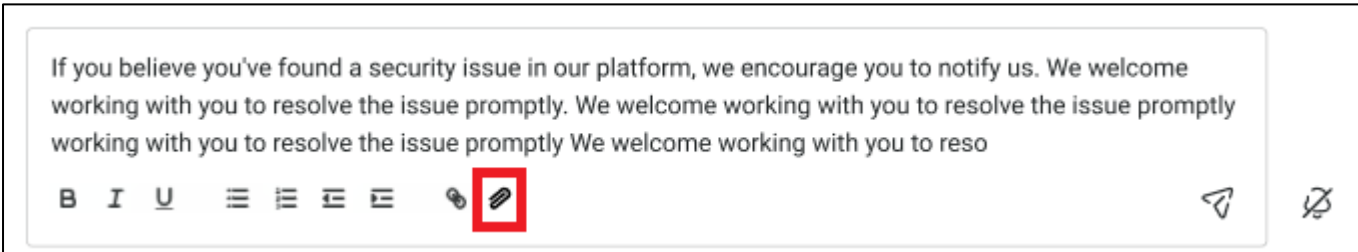
You can add a link to your message. Select a text and click the **chain** icon for that.



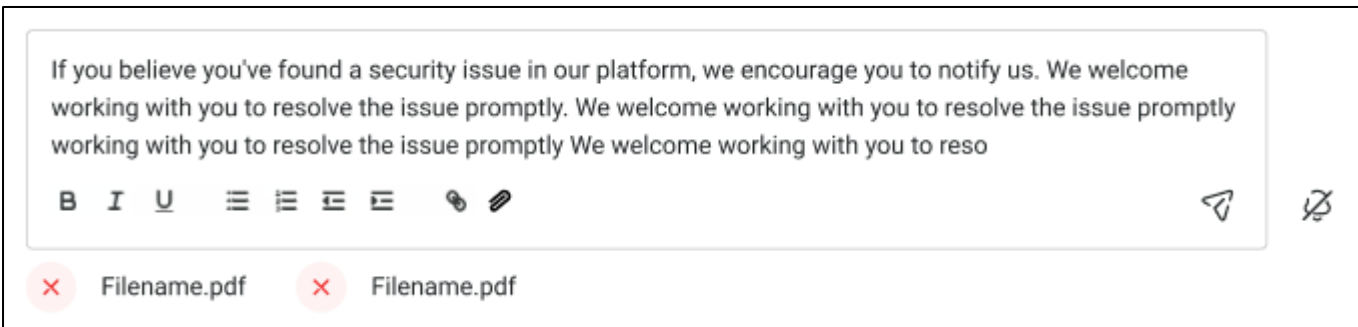
Input an URL and click the **Save** button.



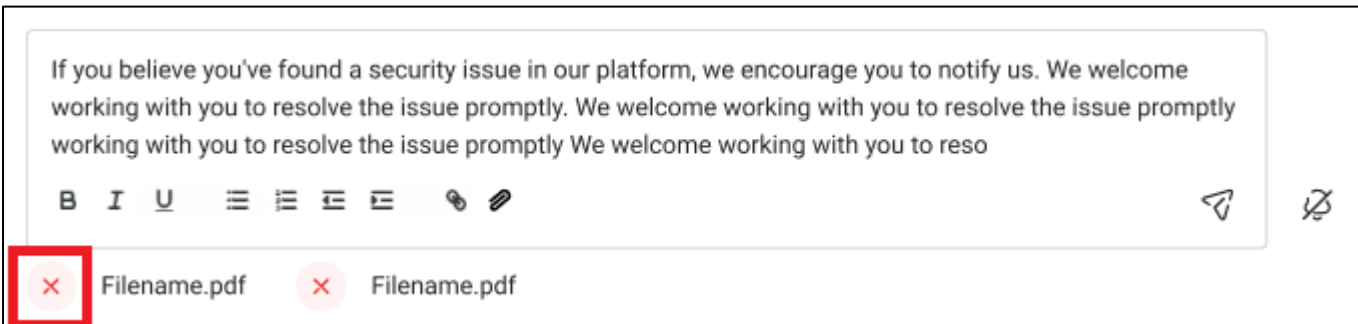
To add attachments to your message, click the **clip** icon and select a file on your device.



Attachments will be listed below the message form.

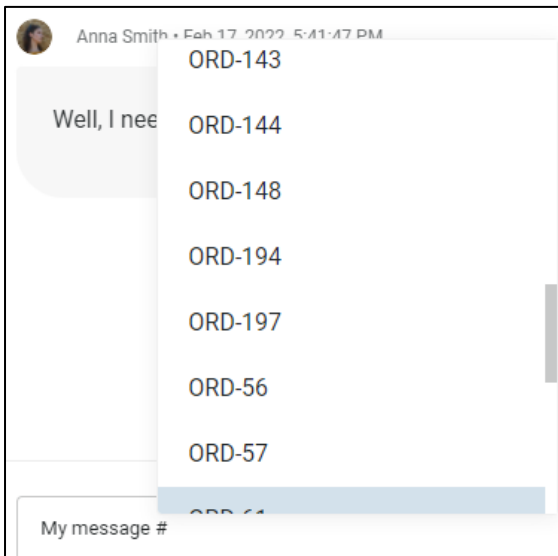


To remove them, click the **X** icon.



Use Shift + Enter keys pressing for new paragraphs.

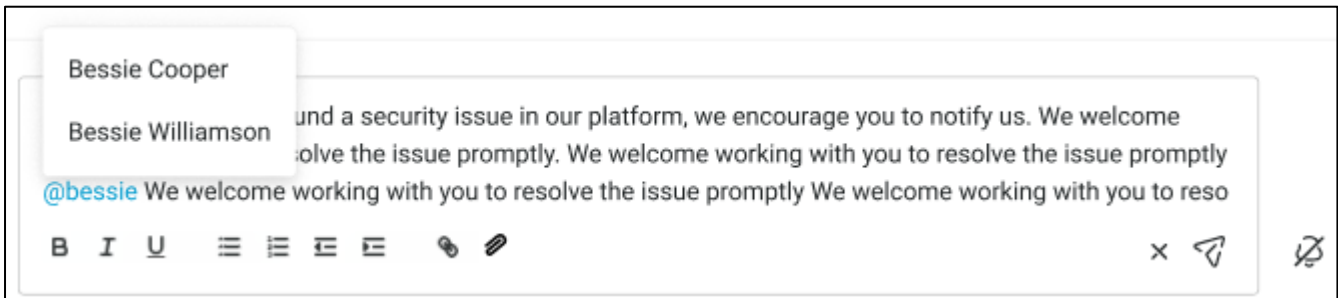
You can add links to orders in your messages. Start typing # and the pop-up with available options will appear. You can choose one of the orders that are owned by the current order owner.



The link to this order will be added.



Also, you can mention other portal users. Start typing @ and the pop-up with users you can ping will appear.

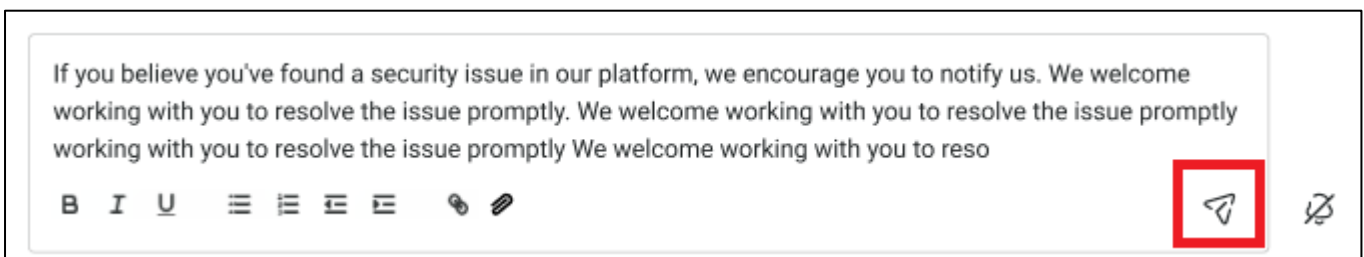


You can see the owner and the order creator (except your name), and users from the discussion history. If you are global admin, lab user, or LIMS lab user, you can see also other active lab users and global administrators.



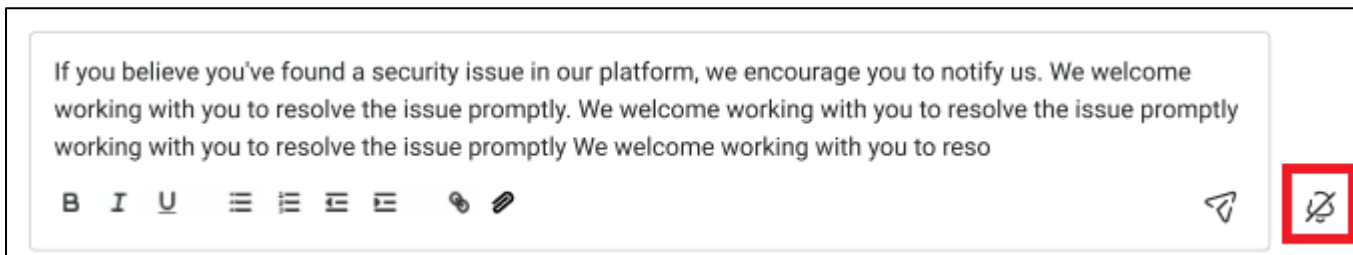
Mentioned user will receive an email and an internal notification and will know that he/she should answer.

To send the message, click the **paper airplane** button.



The Enter key button can also be used to send a message.

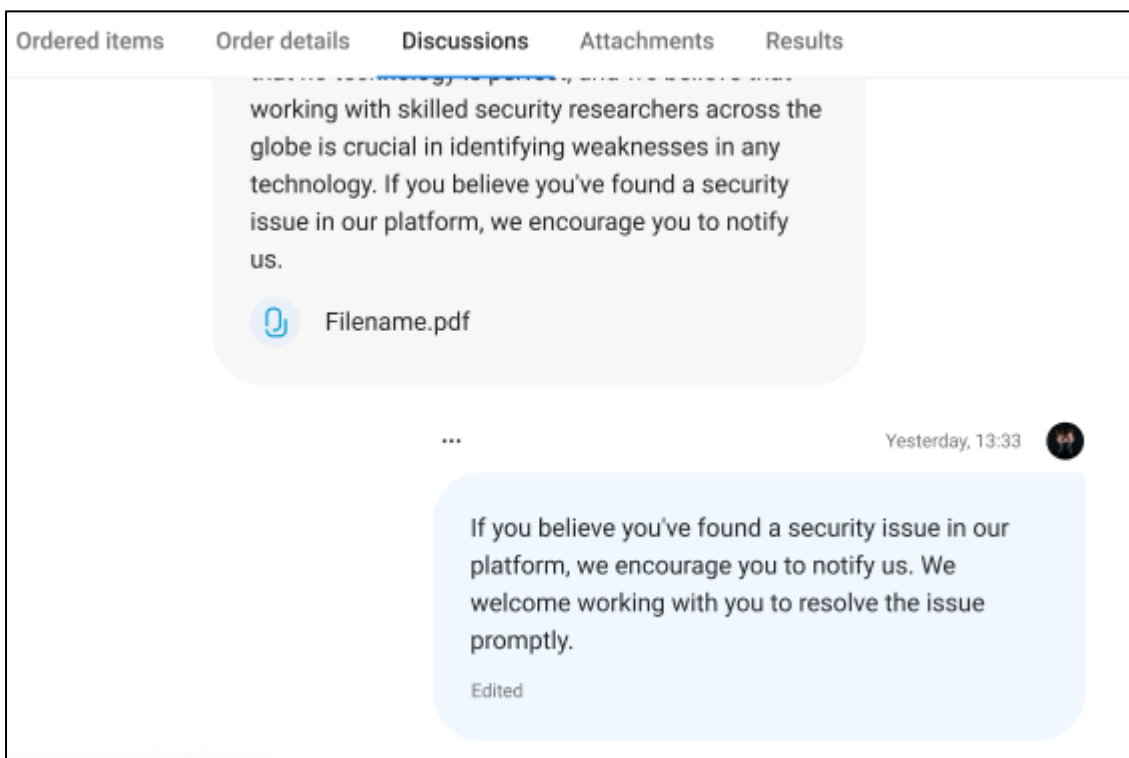
The bell icon serves for receiving notifications of new messages in the discussion of this order. When it is crossed out, you will not receive any notifications.



If you want to be notified, click the button and it becomes not crossed out.

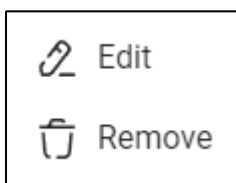
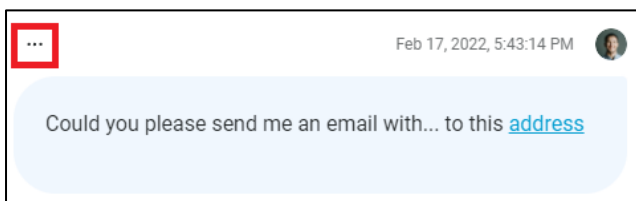


When messages are added, you can see the whole history on the Discussions tab.










Click on attachments if you want to see them.

You can remove or edit your messages. Click the "... " menu icon to open the menu and select the needed option.



Attachments tab





Ordered items	Order details	Discussions	<u>Attachments</u>	Results
File	Date	Author	 Attach	
 Filename.pdf	Jan 10, 8:00 AM	 Bessie Cooper		
 Filename.pdf	Jan 10, 8:00 AM	 Bessie Cooper		

On this tab, the full list of order attachments is shown:





- Attachments added to the order on this tab
- Attachments added to messages on the Discussions tab
- Attachments added to samples

You can see the file name, creation date, and the author.

Click on any item to download the file.





File	Date	Author	 Attach
 Filename.pdf	Jan 10, 8:00 AM	 Bessie Cooper	

To add files to the order, click on the **Attach** button. You need to have the *Manage own orders* permission if you are the order owner or the *Manage consumer's orders* permission if you are not the order owner.

File	Date	Author	 Attach
 Filename.pdf	Jan 10, 8:00 AM	 Bessie Cooper	

Select files on your device to add them to this order.

To remove a file from the order, click the **trash** icon for it. You should be a file author and should have permissions to edit this order.

File	Date	Author	 Attach
 Filename.pdf	Jan 10, 8:00 AM	 Bessie Cooper	

Sample attachments cannot be removed if the order status is In progress or Completed.

Results tab

Ordered items Order details Discussions Attachments **Results**

[Collapse all](#) [Expand all](#) [Download all order results](#)

Submitted **Sample ID** ▾ 23 analyses

LIMS Sample ID

[Download](#) [Upload](#)

Download all results attachments Upload results attachments

[Filename.pdf](#) Yesterday, 13:33 [Filename.pdf](#) Yesterday, 13:33 [Filename.pdf](#) Yesterday, 13:33 [Filename.pdf](#) Yesterday, 13:33

1/14/2022 15482

Date field Lot number

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt

Comment

Analysis name	Analysis description	Method	Results	Result unit
Chloride	Analysis description	IPA	45.17	mg/l

This tab is available only for users with the *View results* permission in the order organization.

If the Ordered Items tab shows what was ordered from the laboratory on the portal, then the Results tab shows what was done in the laboratory for this order.

On this tab, samples with their analyses are displayed.

You can see the following sample data:

- Status
 - When the order is in the Draft or the Submitted statuses, nothing was done in the laboratory, so these samples will not be displayed here.
 - Received – The sample is received by the laboratory.
 - In progress – The laboratory is working on it.
 - Completed – The work on this sample is finished.
- Sample ID
- LIMS sample ID
- Number of analyses in the sample

Also, samples may contain reports with their names and creation dates. Click on the report to download it.

Submitted **Sample ID** ▾ 23 analyses
LIMS Sample ID

Download all results attachments

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

Or click on the **Download results** button to download a zip-file with all reports for the sample.

Submitted **Sample ID** ▾ 23 analyses
LIMS Sample ID

Download all results attachments

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

To download all reports for all samples in the order click the **Download all order results** button.

Collapse all Expand all

Download all order results

Submitted **Sample ID** ▾ 23 analyses
LIMS Sample ID

Download all results attachments

Only LIMS lab users can see the **Upload results** button and can add reports to samples manually.

Submitted **Sample ID** ▾ 23 analyses
LIMS Sample ID

Download all results attachments

Upload results attachments

If this was configured for the order form that was used to create the order, sample details fields can be displayed for each sample with the values entered by consumers when creating or editing the order.

Submitted **Sample ID** ▾ 23 analyses
LIMS Sample ID

Download all results attachments

Upload results attachments

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

Filename.pdf
Yesterday, 13:33

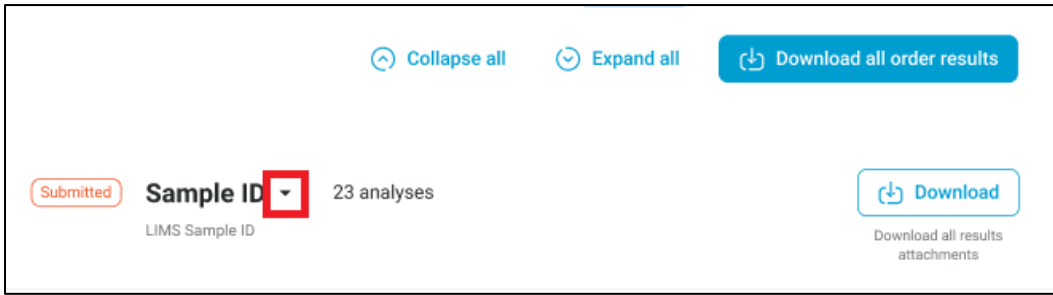
Filename.pdf
Yesterday, 13:33

1/14/2022
Date field

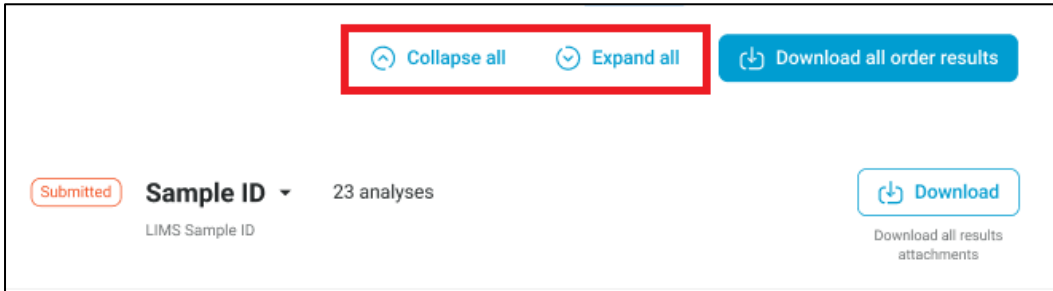
15482
Lot number

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt
Comment

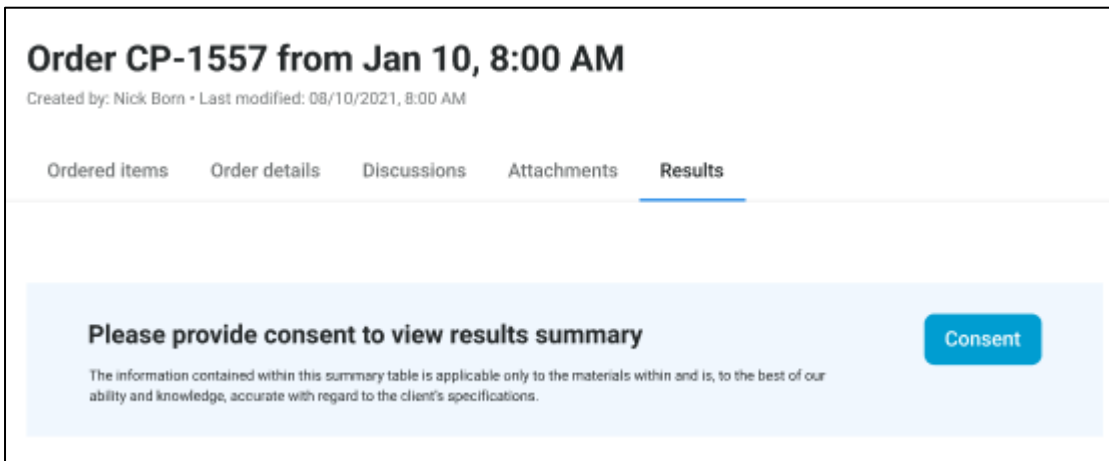
For every sample the list of analyses with their names, descriptions, and results is displayed. You can expand or collapse the table of analyses by clicking the **arrow** icon for a specific sample.



Or you can expand or collapse all the tables for all samples in the order by clicking the **Expand all** / **Collapse all** buttons at the top of the screen.



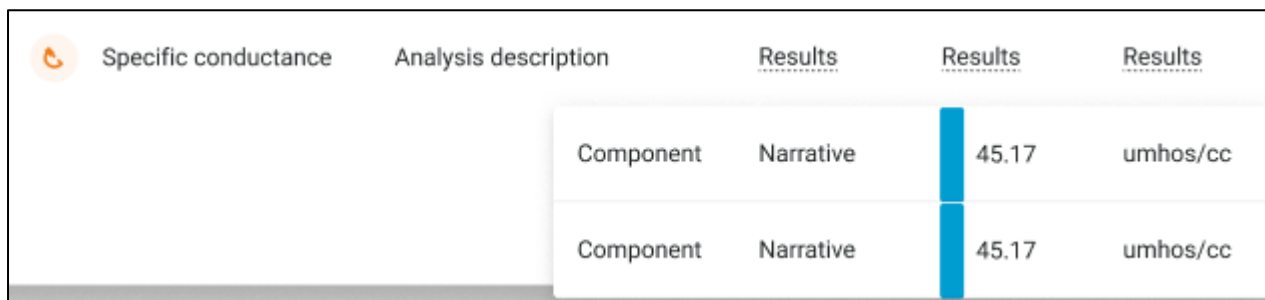
It can be configured by administrators so that in order to see tables with analyses and their results, you need to give your consent. In that case, you will see the special banner and you should click the **Consent** button to view results. Anyway, you always can download results reports.



When you have given your consent (or it was not requested), you will be able to see a table with the list of analyses and their results, the result unit, and the result method.

Analysis name	Analysis description	Method	Results	Result unit
Chloride	Analysis description	IPA	45.17	mg/l
pH	Analysis description	GT	7.50	units
Sulfate sulfur	Analysis description	IPA	45.17	umhos/cc
Specific conductance	Analysis description	Results	Results	Results

If an analysis is a multicomponent one, you can hover the mouse over the Results word and see all components with their results.



Specific conductance	Analysis description	Results	Results	Results
	Component	Narrative	45.17	umhos/cc
	Component	Narrative	45.17	umhos/cc

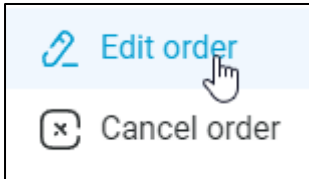
By the blue color results with no violation are marked.

By the orange color results acceptable below or above the norm are marked.

By the red color results that critically over or below the norm are marked.

Order Editing

If you have permissions to manage an order, you can click the “...” menu icon, open the menu, and select the Edit order menu option.

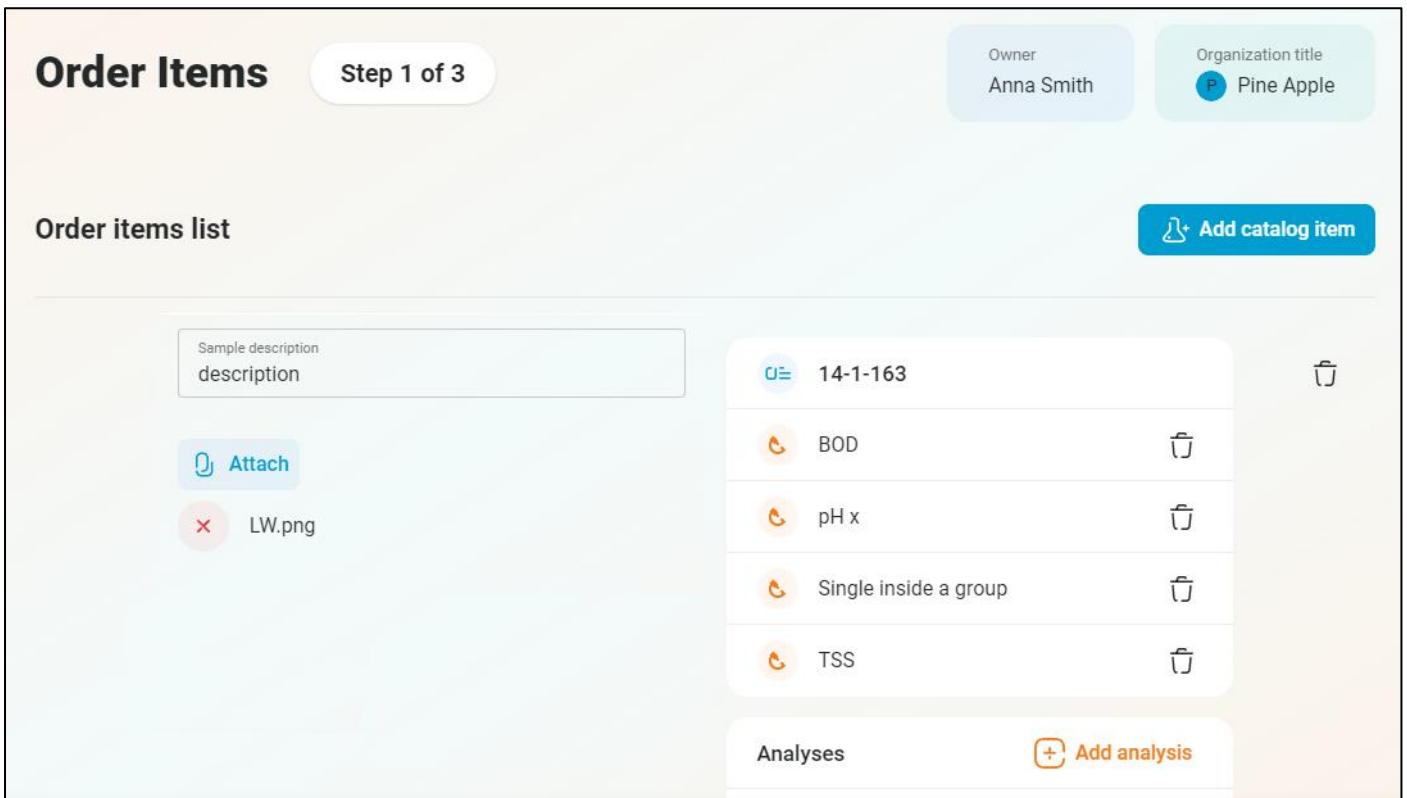


The wizard similar to the **Create Order** wizard will be open from step 1.

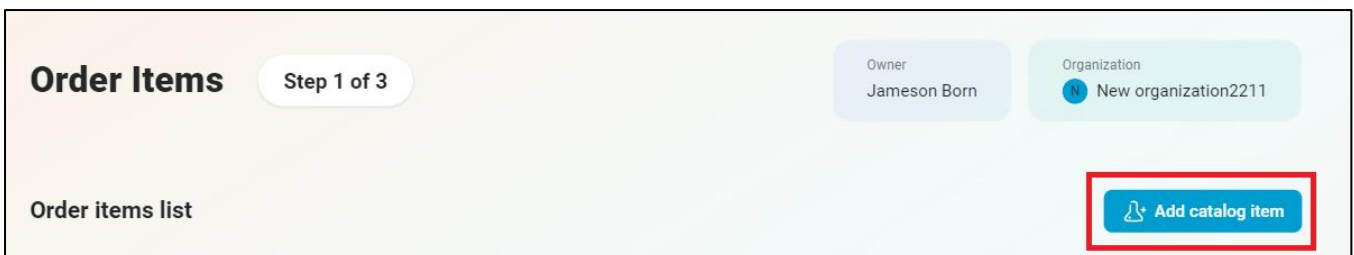
It contains all the information of the order that you can see and edit.

Please note that if you are editing a Submitted order, it is already available for the laboratory and can be onboarded at any time. So possibly, your changes will not be received by the laboratory. Try not to edit submitted orders.

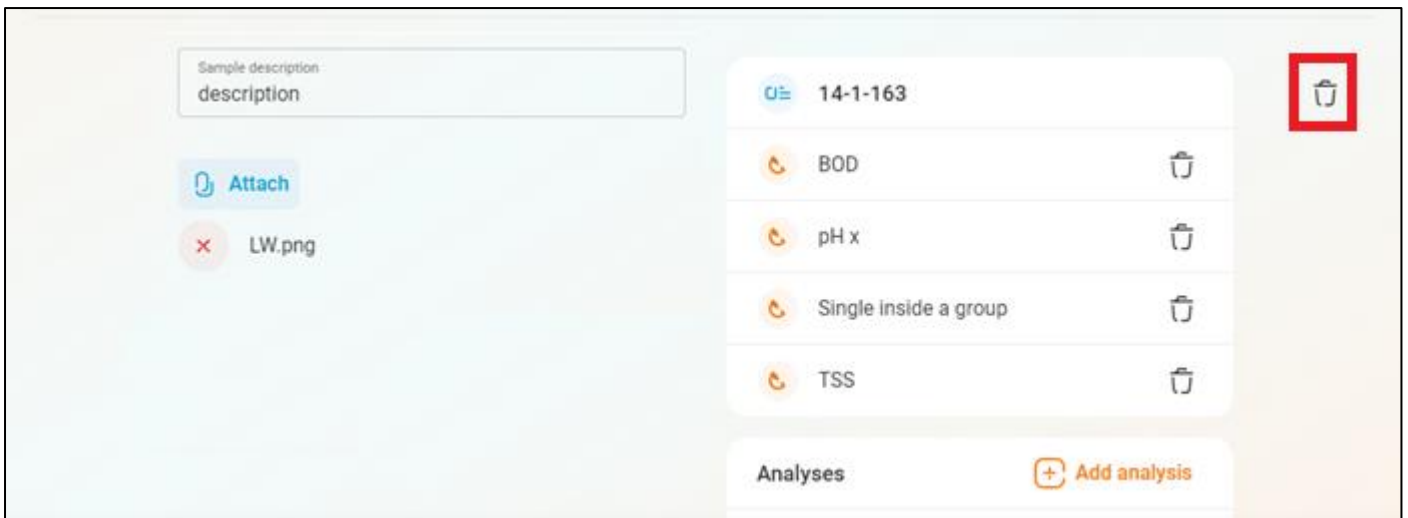
On **Step 1 – Order Items**, the list of ordered samples with analyses is displayed.



Click the **Add catalog item** button to add a new sample to the order.



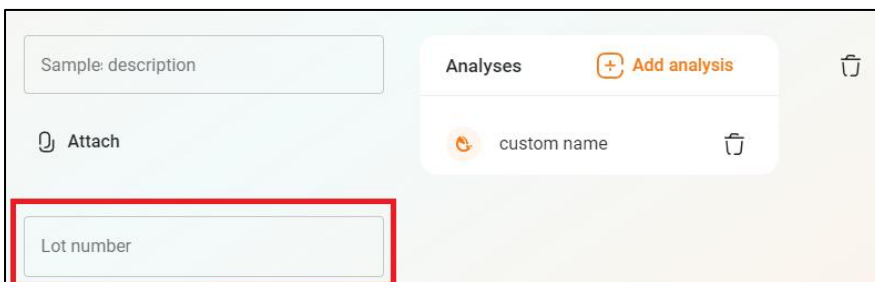
Click the **trash** icons to remove analyses or the entire sample from the order.



You can add or remove sample attachments, edit sample comments.



If this was configured for the order form that was used to create the order, sample details fields will be displayed for every sample that you should or can fill in.



Click the **Next** button to go to the next step.

On **Step 2 – Order Details**, all additional information about the order is displayed: report, invoice, CC addresses, additional order details.

The screenshot shows a web form titled "Order Details" at "Step 2 of 3". At the top right, there are two buttons: "Owner" with the name "Anna Smith" and "Organization" with a profile icon and the name "Pine Apple".

The "Addresses" section contains three items:

- Report address**: A text input field with a "+ Add" button. Below the field, it says "Report address is not specified."
- Invoice address**: A text input field with a "+ Add" button. Below the field, it says "Invoice address is not specified."
- CC Addresses**: A section with a "+ Add" button and the text "CC list is empty."

The "Details" section contains one item:

- Shipping information**: A dropdown menu currently showing "drop-down" and "new value".

At the bottom left, there is a "Previous step" button with a left arrow. At the bottom right, there is a "Next" button.

You can edit addresses or entered values for additional order details.

Click the **Next** button to go to the next step.

On **Step 3 – Review Order**, you can check every order data and submit the order. Orders with the Draft status also can be saved as a draft.

The screenshot displays the 'Review Order' interface, which is Step 3 of 3. At the top, there are tabs for 'Order form' (selected) and 'Organization' (Apache Foundation). Below this, the 'Addresses' section contains three columns: 'Report Address', 'Invoice Addresses', and 'CC Address'. Each column has a table with fields for Street, City, State, ZIP, Country, and Email. The 'Report Address' and 'Invoice Addresses' columns have identical data: Street: 1556 Broadway, City: New York, State: NY, ZIP: 10120, Country: USA, Email: bessie.cooper@gmail.com. The 'CC Address' column has two rows for 'Contact name': Wade Warren and Bessie Cooper. Below the addresses is the 'Order Items list' section, which includes a 'Sample name' with a description, a 'Catalog Item Name' dropdown menu (showing 'Analysis'), and a file upload area with 'Filename.pdf'. At the bottom, the 'Details' section has a 'Section name' field and a 'Ship via' dropdown menu. The interface concludes with a '← 2 step' indicator and two buttons: 'Save as Draft' and 'Submit order'.

Report Address	Invoice Addresses	CC Address
Street: 1556 Broadway	Street: 1556 Broadway	Contact name: Wade Warren
City: New York	City: New York	Contact name: Bessie Cooper
State: NY	State: NY	
ZIP: 10120	ZIP: 10120	
Country: USA	Country: USA	
Email: bessie.cooper@gmail.com	Email: bessie.cooper@gmail.com	

Order Items list

Sample name
Solidus source code deals with critical information and processes, like collecting users information or submitting payments using credit cards. We know that no technology is perfect, and we believe that working with skilled security researchers across the globe is crucial in identifying weaknesses in any technology. If you believe you've found a security issue in our platform, we encourage you to notify us.

Catalog Item Name

- Analysis
- Analysis

Details

Section name: []

Ship via: []

Ship date: []

See the detailed description in the Create Order section of this document.