2015

System Administrator Guide

System Administrator Guide
PLC-XX– Rev. 4/24/2015

Porter Lee Corporation
1901 Wright Blvd
Schaumburg, IL 60193
Tel: (847) 985-2060
Fax: (847) 584-0556

CONTENTS

CONFIGURATION

The PLIMS allows you to customize virtually every aspect of your system implementation. Most customization is done from the Configuration area in the PLIMS. After the initial implementation process, the Configuration area is used for maintaining and adding to the initial setup. This includes entering new users, configuring levels of user access, entering new codes, etc.

ACCESSING CONFIGURATION

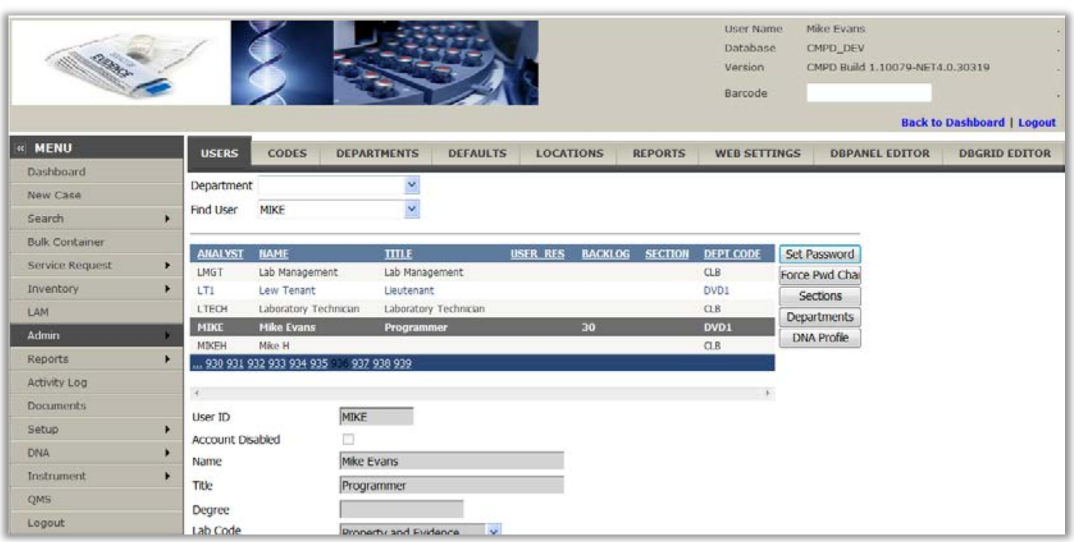
The Configuration area is accessed from the Dashboard menu, by selecting the **Configuration** option under **Admin**. Access to this feature is typically limited to system administrators.

NOTE This option will not appear in the menu unless you have the User Group permission "Access Configuration Program." See page 11 for more information on setting user group permissions.

Figure 1: Select Configuration in the Dashboard Menu

The Users tab will be selected by default on the Configuration screen. There are nine tabs on the Configuration screen. Each tab is used to configure different areas of the PLIMS. Descriptions of each tab are provided in the following sections of this chapter.

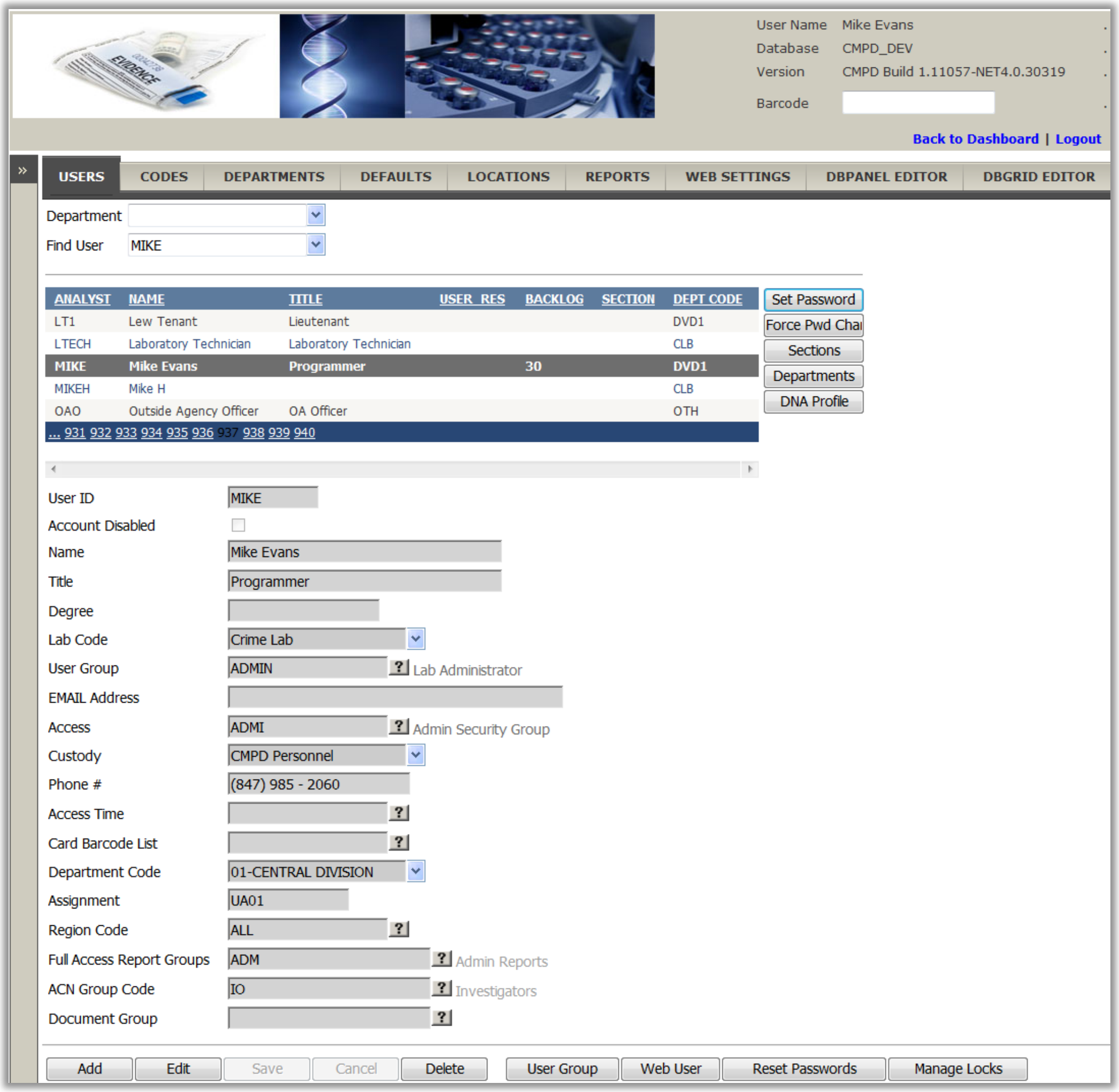
Figure 2: Users tab on Configuration screen



USERS TAB

The Users tab is used to add and maintain user accounts. Users must have a record saved here in order to log in to the PLIMS. Once a user record has been added, you can use the buttons on the tab to manage the user's password and configure their level of system access.

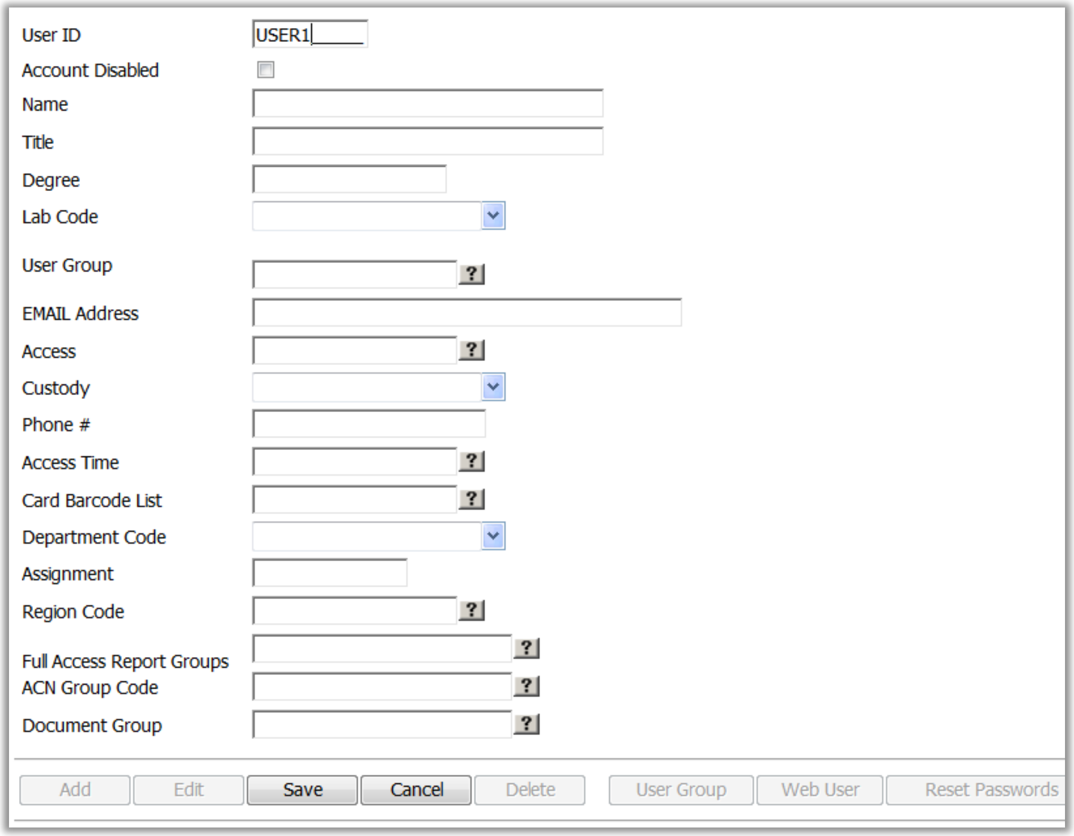
Figure 3: Users tab



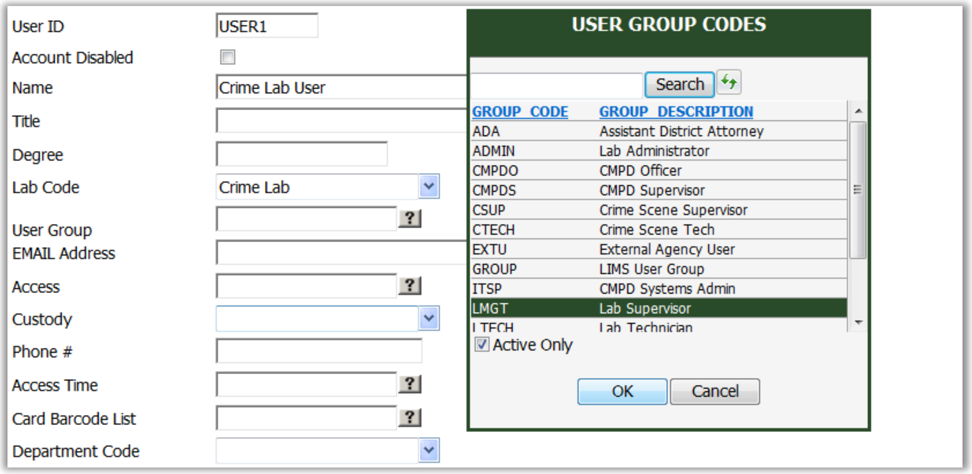
ADDING A NEW USER

The following steps show how to add a new user record. Please note that once the record is created, you need to set the user's password in order to allow them to log in to PLIMS. See page 6 for instructions on setting a user's password.

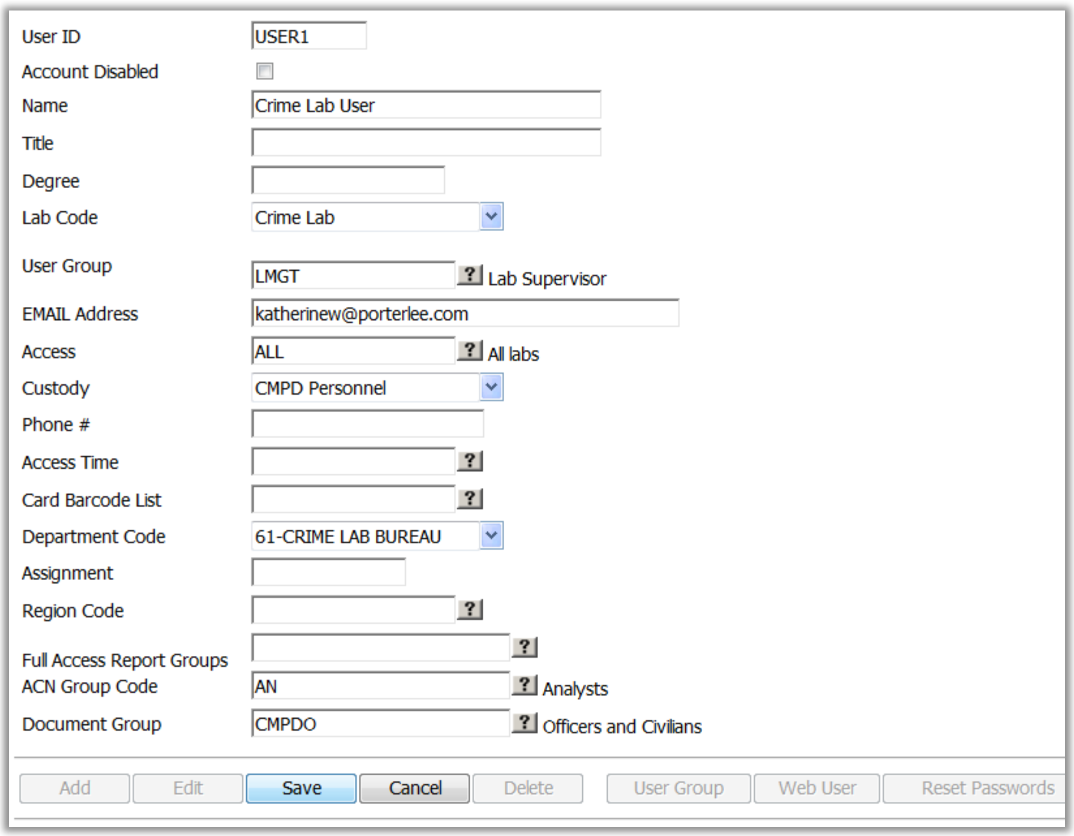
1. Click the **Add** button on the Users tab.
2. Enter a **User ID**. User IDs can consist of letters and numbers and they can be up to six characters long. Each user's ID must be unique.



3. Enter the user's **Name** as you want it to display throughout the system.
4. Select the user's **Lab Code**.
5. Select their **User Group**. User Groups determine a user's level of system access. Clicking the question mark icon next to the field displays a User Group Codes lookup. Double-click an option in the lookup to select it.



6. You can assign an Access Code for the user in the **Access** field.
7. Select the user's **Custody**. A location for the user will automatically be added to that custody once you save the new record.
8. Select the user's **Department Code**.
9. Select the user's **ACN Group Code**
10. Enter any additional information and click **Save**.

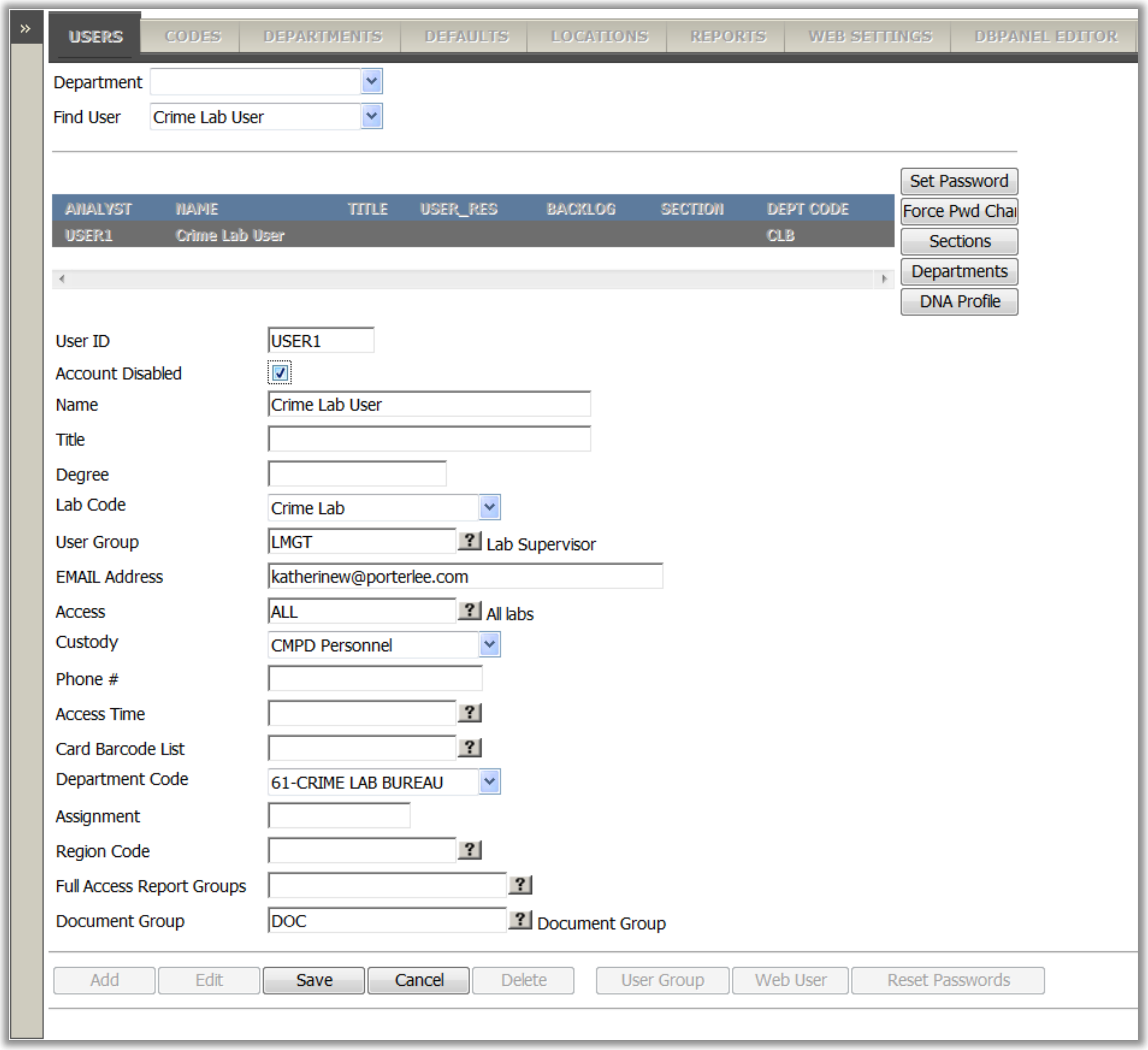


DISABLING USER ACCOUNTS

Disabling a user's account prevents the user from logging in to PLIMS. It's recommended that you disable user accounts instead of deleting them, in case the user is associated with any records in the system.

In order to disable a user's account, select the user on the Users tab and click the **Edit** button. Check the **Account Disabled** box below the User ID and click **Save.**

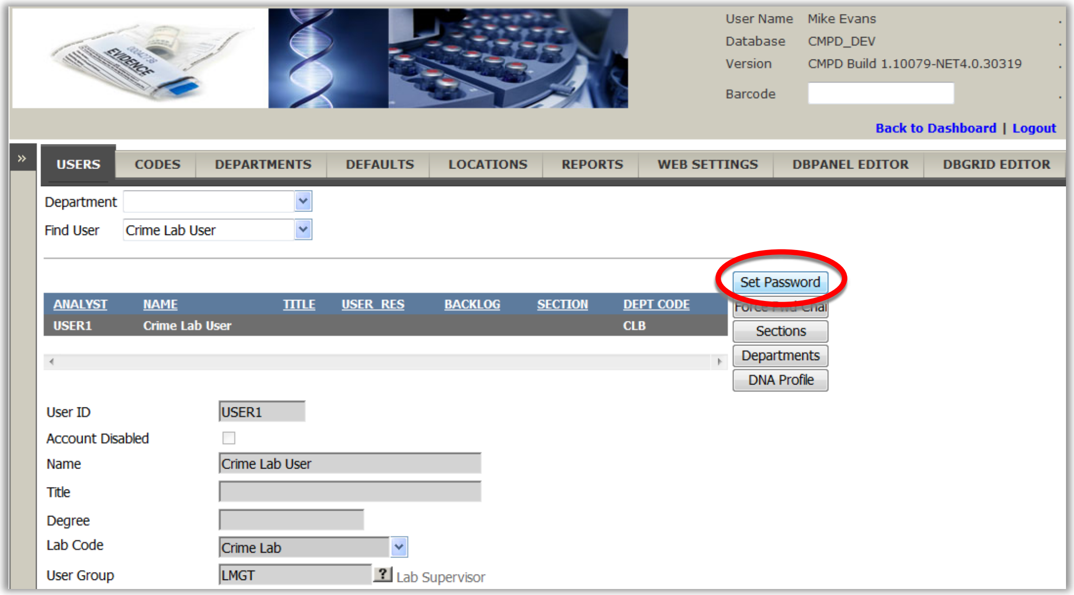
Figure 4: Check Account Disabled



SETTING A USER'S PASSWORD

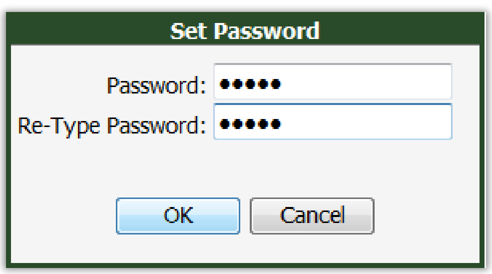
To set a new user's password, or change an existing user's current password, select the user record on the Users tab and click the **Set Password** button.

Figure 5: Set Password button on the Users tab



A Set Password dialog box will display. Enter a new password for the user in the **Password** field. Enter it again in the **Re-Type Password** field and click **OK**. The dialog box will close if the password was set correctly.

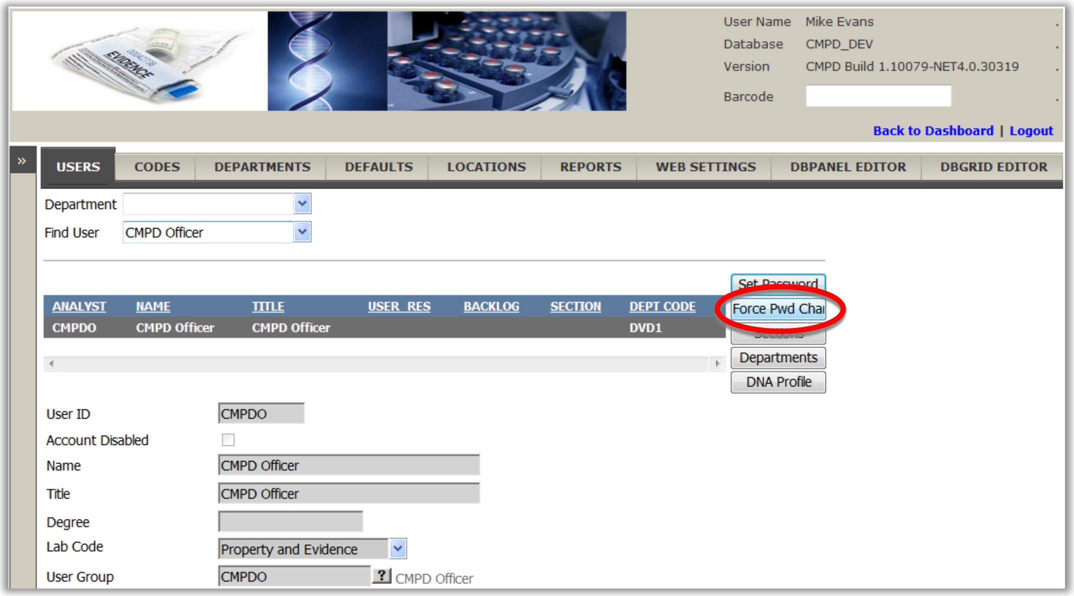
Figure 6: Set Password dialog box



FORCE PASSWORD CHANGE

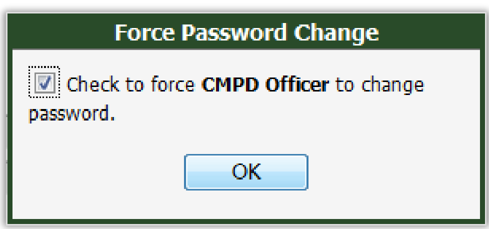
The Force Pwd Change button forces a user to change their password to a new one of their own choosing. To make a user to change their password, select the user on the Users tab and click the **Force Pwd Change** button.

Figure 7: Force Pwd Change button on the Users tab



A Force Password Change dialog box will display. Check the box on the screen and click **OK**. The user will be forced to change their password the next time they try to log in to PLIMS.

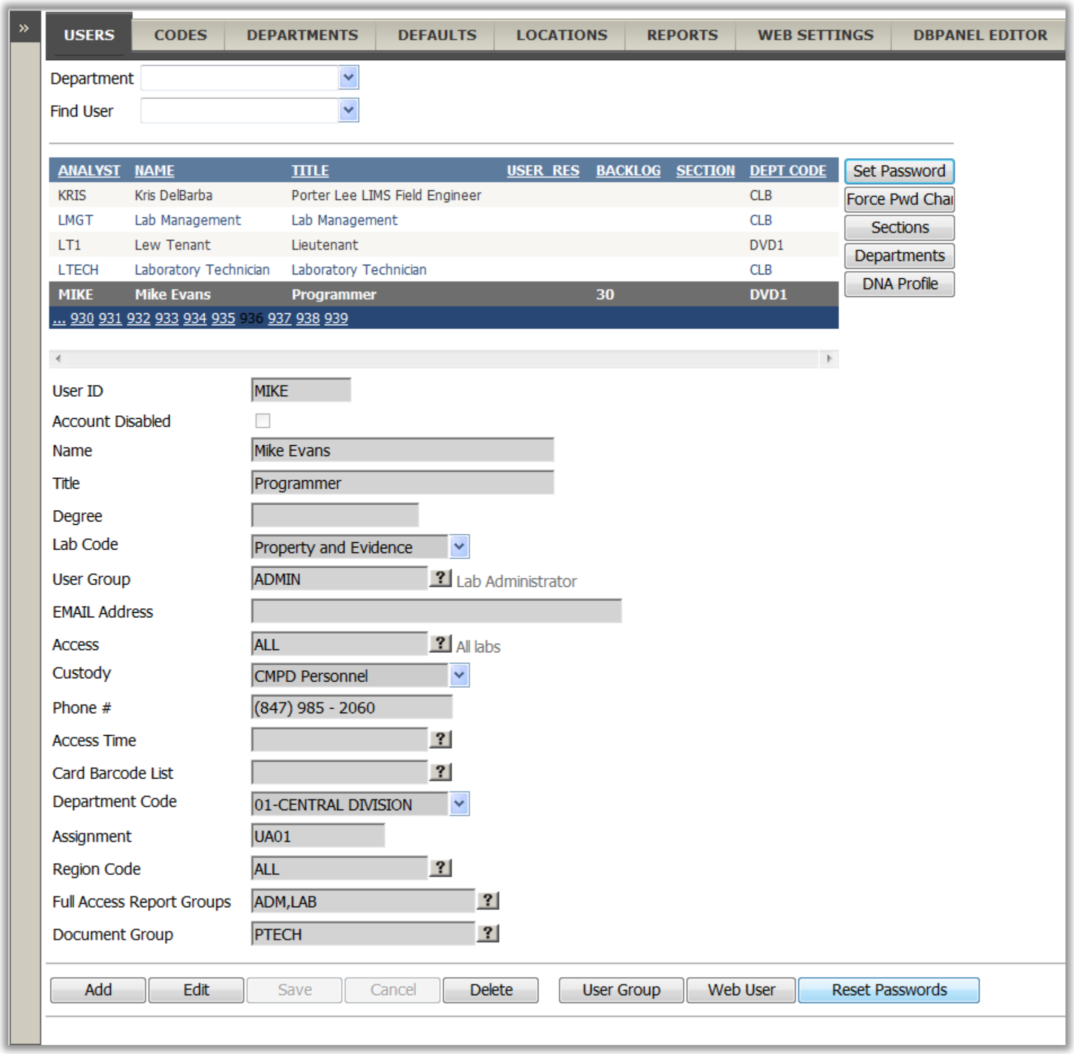
Figure 8: Force Password Change dialog box



RESET PASSWORDS

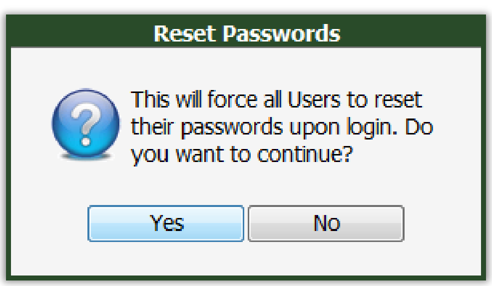
You can force all system users to change their passwords by clicking the **Reset Passwords** button on the bottom of the Users tab.

Figure 9: Reset Passwords button on the Users tab



Clicking the button displays a Reset Passwords dialog box. If you select **Yes**, all users will be forced to reset their passwords the next time they try to log in to PLIMS.

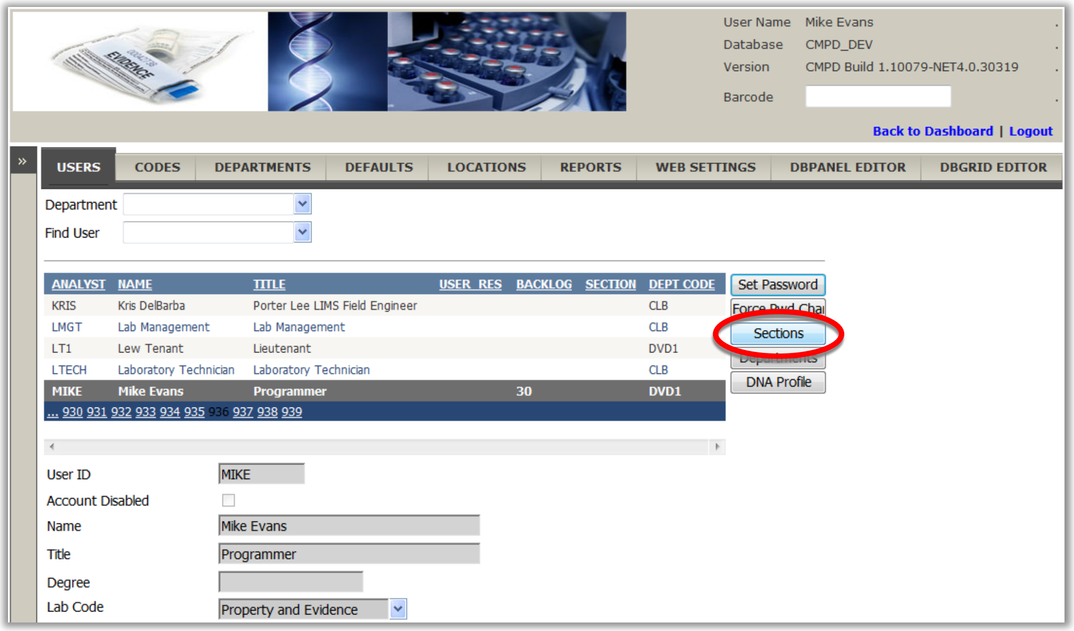
Figure 10: Reset Passwords dialog box



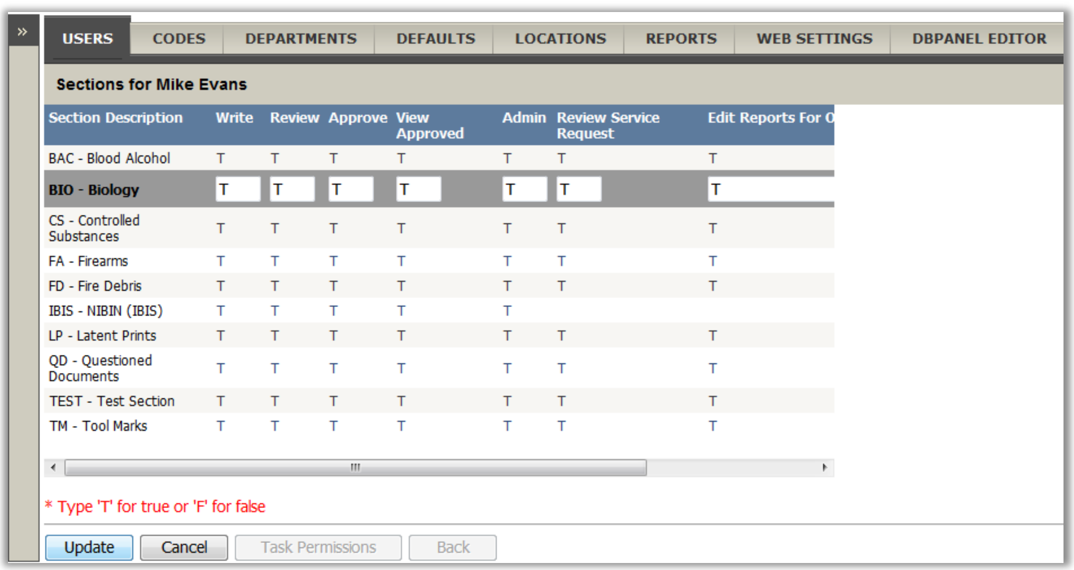
SECTION PERMISSIONS

The Section permissions control a user's level of access to the report writing tools for each lab section. These settings determine whether a user can perform tasks like writing, reviewing, and approving lab reports for a particular section. To edit a user's section permissions, select the user on the Users tab and click the **Sections** button.

Figure 11: Sections button on Users tab



The Sections screen will display. The grid columns contain a row for each lab section. To change the user's permissions for a section, select the row for that section, and click the **Edit** button. An entry field will appear below each column in the selected row. Enter "T" in a field to grant the user the permission described in the column heading, or enter "F" to restrict their access. Descriptions of the section settings are provided in Table 1 on the next page. Once you are done, click **Update**.



You can view/change additional settings by clicking the **Edit All** button. A list of all the permissions will display. Enter "T" in the entry field to allow the user access to a function or enter an "F" to restrict it. Once you are done, click **Save**.

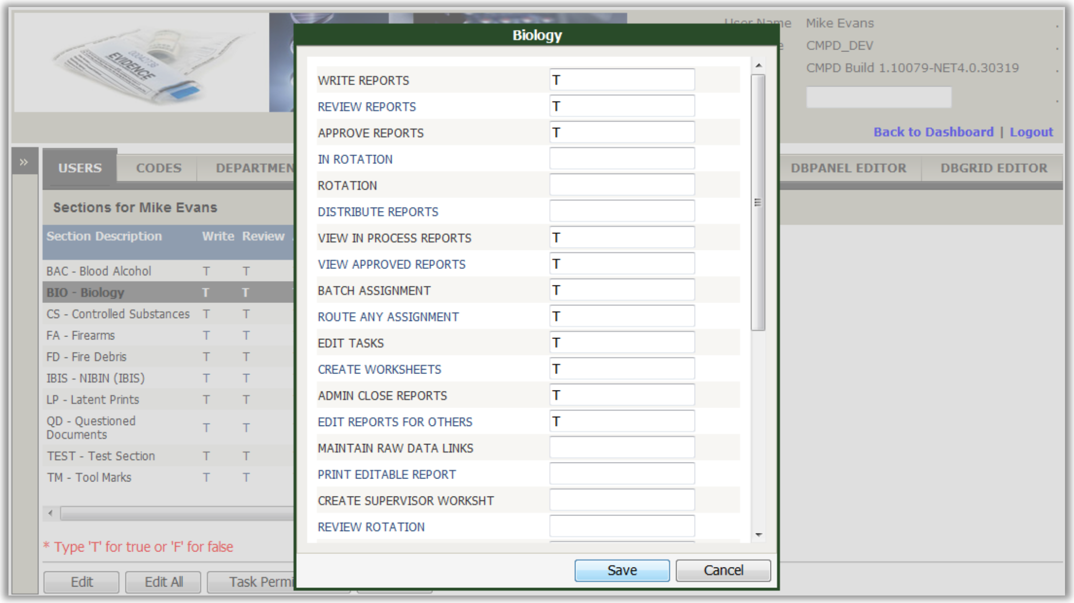


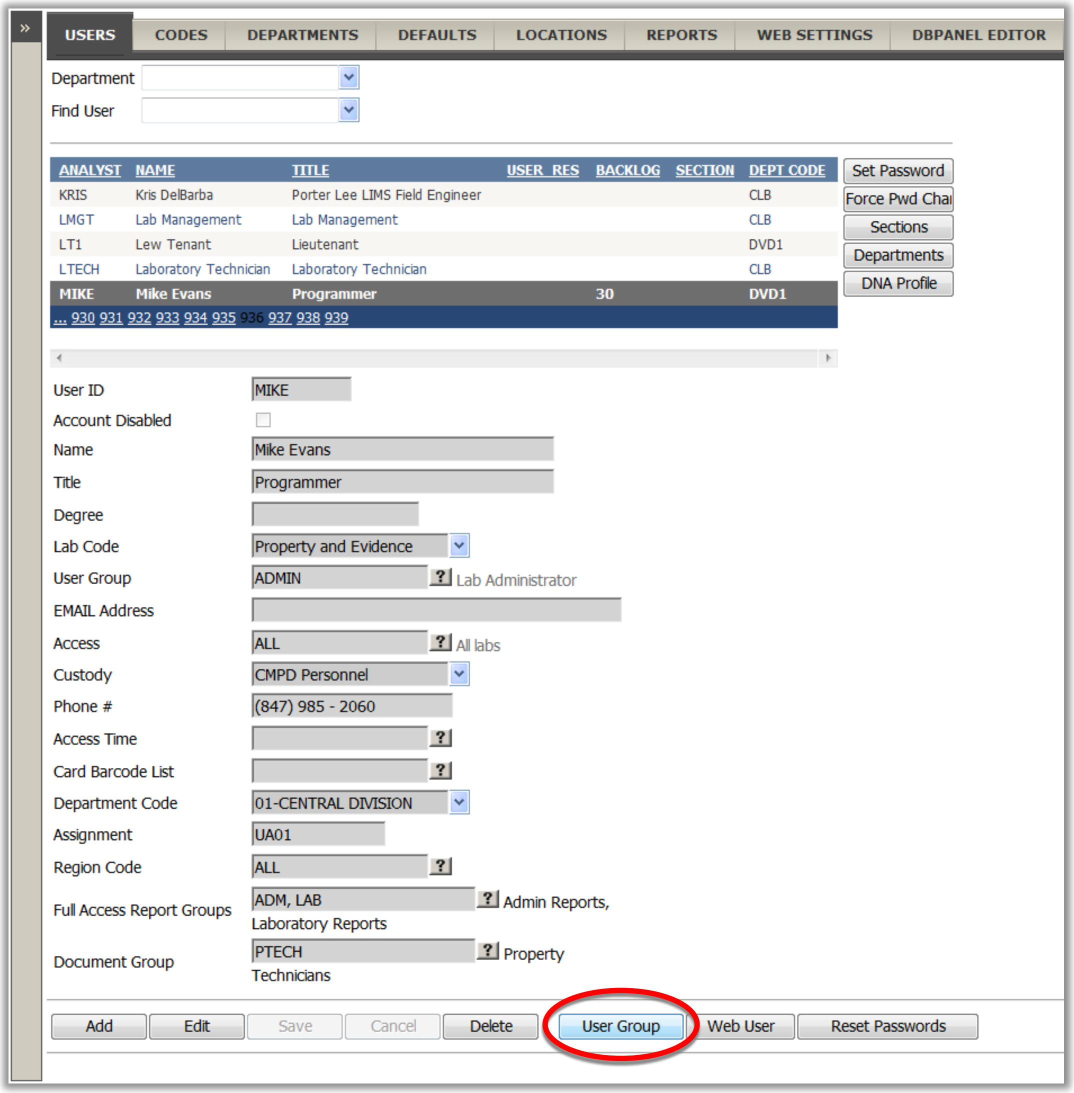
Table 1: Section Permissions

Permission	Description
Write Reports	Allows user to write reports for section
Review Reports	Allows user to review reports for section
Approve Reports	Allows user to approve reports for section
Distribute Reports	Allows analyst to distribute reports for section. This distribution is done through the Report Distribution application.
View In Process Reports	Allows the user to view reports prior to their final approval
View Approved Reports	Allows the user to view approved reports
Batch Assignment	Allows the user to make batch assignments for the section from the Assignments search
Route Any Assignment	User will be able to route any assignment, including other users' assignments and assignments not currently routed to them
Edit Tasks	Allows user to edit assigned tasks. Most applicable to batch processes.
Create Worksheets	Allows the user to create new worksheets for the section
Admin Close Reports	Allows the user to close a report before it's finalized. Supervisors commonly use this to cancel an assignment after work has been done, for example, if the District Attorney requests that analysis be suspended.
Edit Reports For Others	Allows the user to edit reports for other users' assignments
Maintain Raw Data Links	Allows the user to update the raw data link to source files linked to a specific assignment
Review Service Requests	Allows the user to review and approve service requests for the section
Can Do Confirmation	Allows user to enter their pin for matrix test types that need confirmation

USER GROUPS

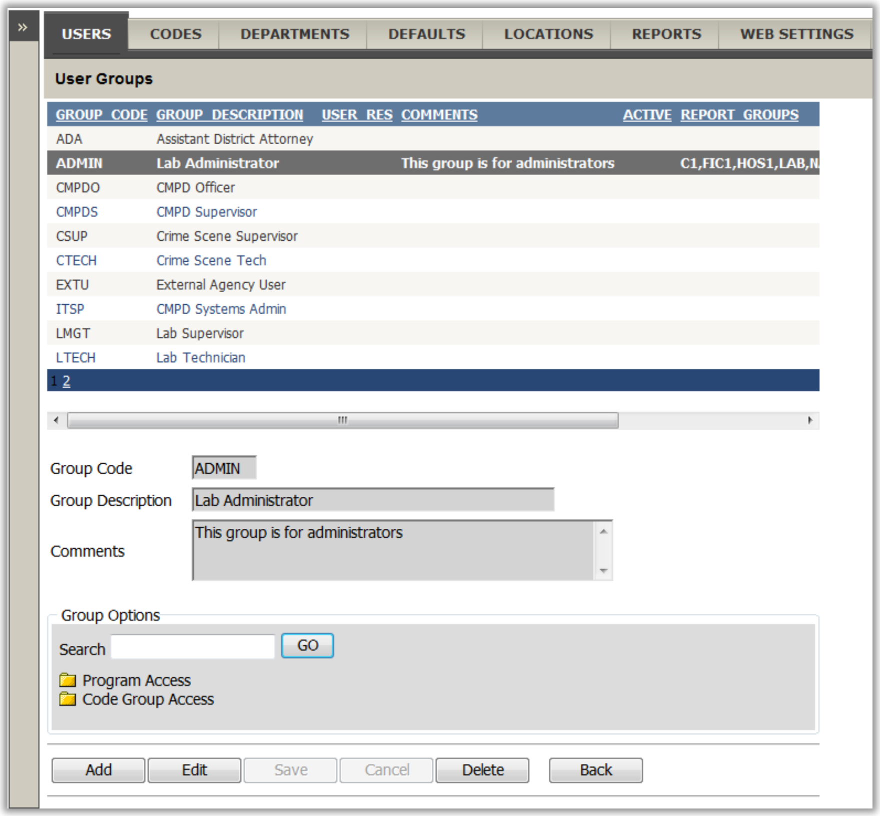
User Groups are used to create standard levels of system access that can be assigned to users based on job function. You add and manage the user groups by clicking the **User Group** button on the bottom of the Users tab.

Figure 12: User Group button



The User Group screen will display. You can view the permissions for a group by selecting it in the grid columns. The permissions for the selected group will display in the Group Options area.

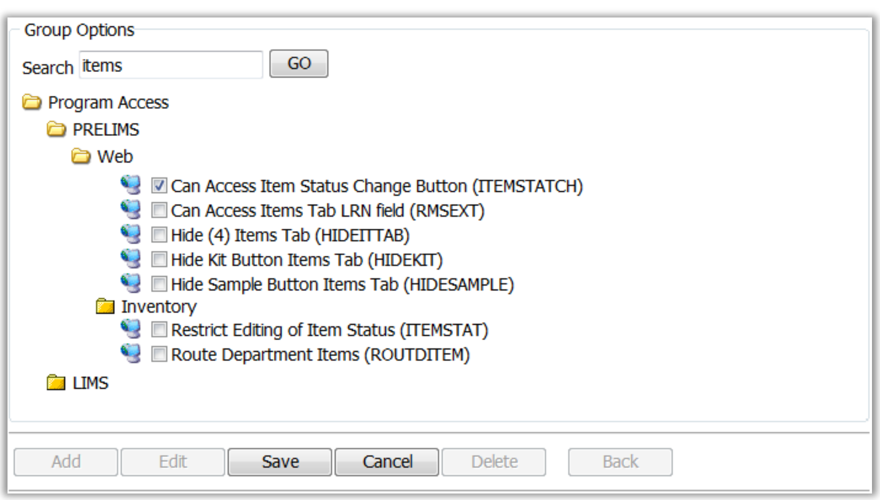
Figure 13: User Groups screen



The permissions for the selected group will be checked in the Group Options. You can expand and collapse the menus in the Group Options area by clicking the folder icons next to them. Descriptions of the individual options are listed in Table 2 on page 15.

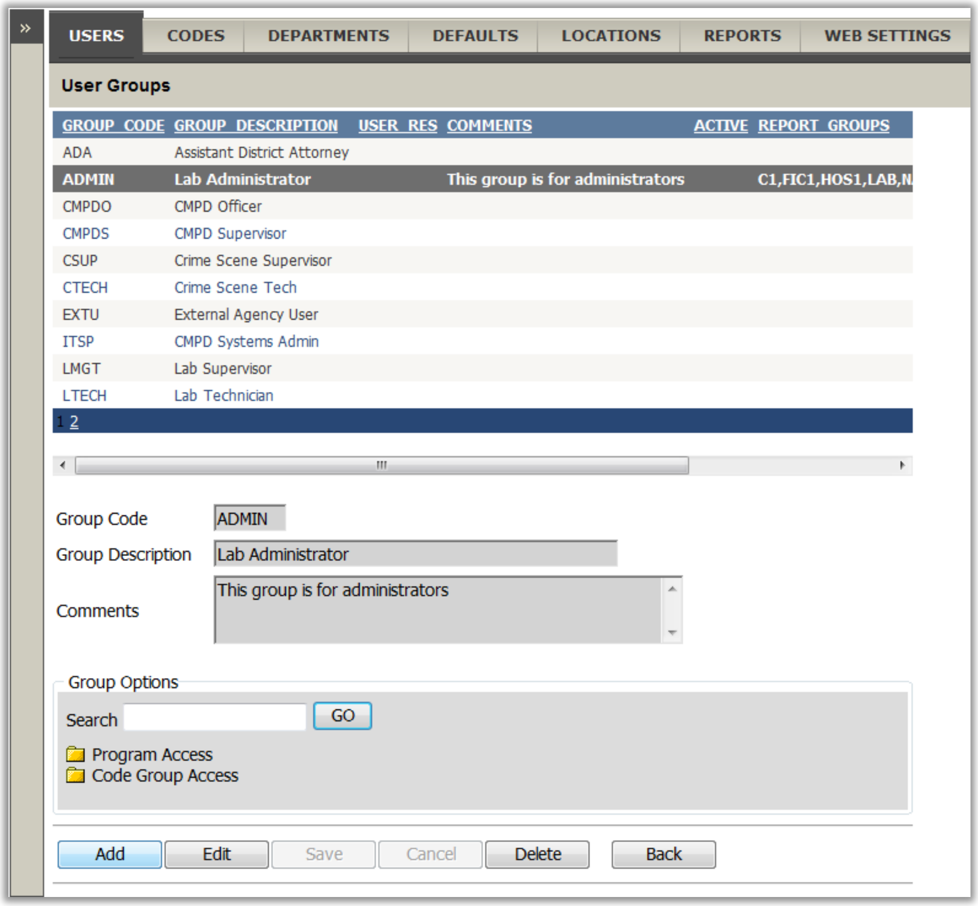
You can use the Search field to find a specific group option. You can search based on a whole or partial description, an Authcode, or a menu name. Enter the value into the field and click **GO**. The Group Options will be filtered based on the results.

Figure 14: Group Options

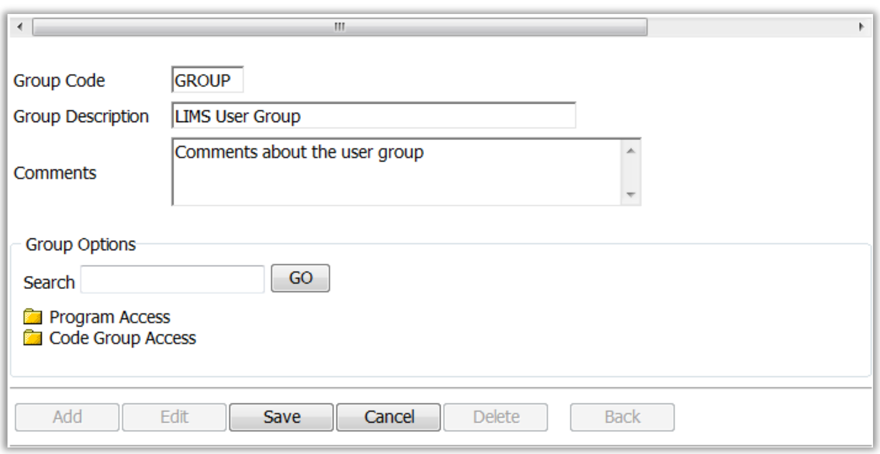


ADDING A USER GROUP

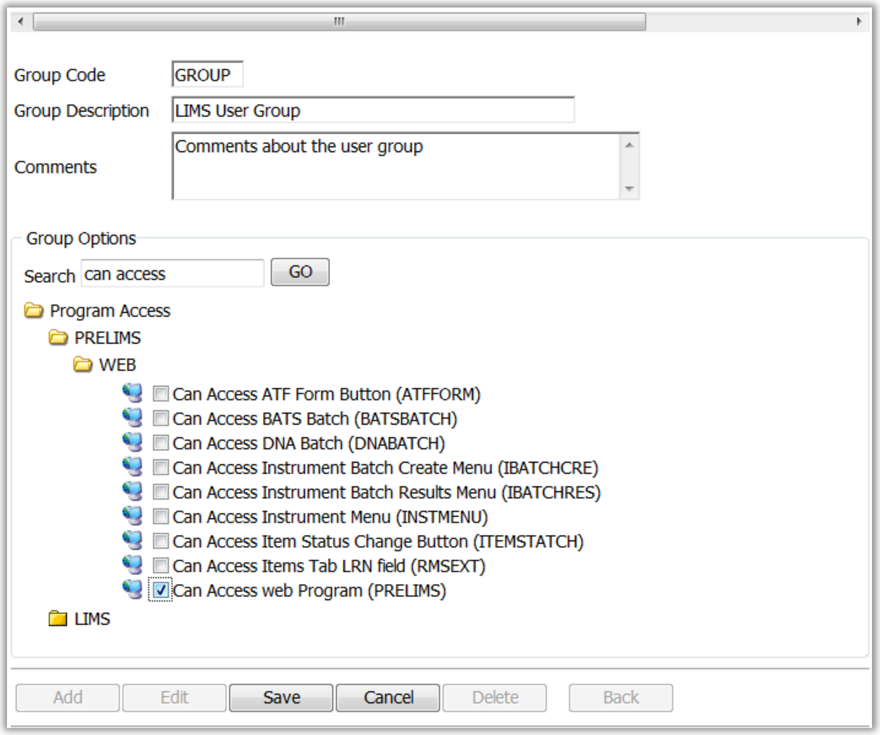
1. Click the **User Group** button on the bottom of the Users tab. The Users Groups screen will display.
2. Click the **Add** button on the User Groups screen.



3. Enter the **Group Code** and **Description.** You can enter any comments about the group in the **Comments** field.



4. Select the **Group Options**. You can expand and collapse the Group Options menus by clicking the folder icons next to them. Check the box next to an option in order to select it. Descriptions of the individual options are listed in Table 2 on page 15.



5. Click the **Save** button once you are done.

USER OPTION DESCRIPTIONS

Table 2: User Option Descriptions

User Option	Description	Auth Code
Program Access/Utility		
Access Clear Database Program	This program completely empties the database of all records. Access should be limited to the system administrator.	CLEARDB
Access Custody Command Center	Allows user to run CustodyCommandCenter.exe. This utility is used to modify chain of custody records.	CCC
Uses Instrument Interface	Allows user to use INSTVIEW, INSTPOP, and other instrument interface-related applications	SEQWIZ
Access the Auto Task Program	Allows user to access Autotask program. Autotask is used for automating tasks such as sending notifications when a specific event occurs. Used by system administrators and Porter Lee Corporation personnel	AUTOTASK
Load Image from a folder to Image Vault	Allows user to upload files from local or network drives to the Image Vault	LOADIMG
Program Access/Quality Management System		
Access Audits	Allow users to work with the Audits and CAs feature	QMS-AUDIT
Access Custom Reports	Allows the user to work with the Custom Reports feature	QMS-REPORT
Access Document Control	Allows the user to work with the Document Controls feature	QMS-DOCS
Access Proficiency Tests	Allows the user to work with the Proficiency Test feature	QMS-PTEST
Access QC Flags	Allows the user to place Quality Control Flags on user accounts	QMS-QCFLAG
Access QMS	Allows the user to access the QMS program	QMS
Access QMS Programs	Allows the user to work with the Programs feature	QMS-PROGS
Access Testimony Monitoring	Allows the user to work with the Testimony Monitoring feature	QMS-MONIT
Document Administrator	Allows user to edit document reviews assigned by other users and to define the QMS Working Folder for all system users	QMS-DOCSA
QMS Program Administrator	Allows the user to set status for milestones and cancel milestones	QMS-PROGA
Program Access/ PRELIMS/ Web		
Ability to transfer to a 1023 location	Authorizes user to transfer items to a 1023 location (i.e., a location where "L1023dep" or "L1023epc" is set to "T" in CUSTLOC table). User will be able to select reason for refusal on transfer screen	1023LOC
Access Agency Locked Cases	User can access locked cases for their agency (the user's Department Code must match the Investigating Agency)	AGENLOCK
Access All Locked Cases	User can access all locked cases	ALLLOCK
Access Inst View	Displays Inst View option under Instruments in the Dashboard menu. Allows user to access instrument interface for viewing and capturing tiff files	INSTVIEW
Access NICS Images	Customer-specific. Displays NICS button on Case Info tab	NICSIMG
Access Superlock Cases	User can access all locked and super-locked cases. Allows user to lock, unlock, and manage team members for any case, even if they are not the Investigator or Alternative Investigator.	SUPERLOCK
Allow Batch Service Requests	Allows user to scan item and task barcodes to create service requests	BATCHSR
Approve Retention Review Requests	User can be selected as second reviewer and perform final retention review	RETENTION
Can Access DNA Batch	Displays DNA options in the Dashboard menu	DNABATCH
Can Access Instrument Batch Create Menu	Displays Batch Create option under Instrument in Dashboard menu. Allows user to access Batch Create screen.	IBATCHCRE
Can Access Instrument Batch Results Menu	Displays Batch Results option under Instrument in Dashboard menu. Allows user to access Batch Results screen.	IBATCHRES
Can Access Instrument Menu	Displays Instrument options in Dashboard menu	INSTMENU
Can Access Item Status Change Button	Displays Change Status button on Items tab. Allows user to manually update item status	ITEMSTATCH
Can Access Items Tab LRN field	User can edit LRN field on Items tab	RMSEXT
Can Access web Program	Controls top level access to the PLIMS application. Authorizes user to log in to PLIMS	PRELIMS

Can Authorize Restricted Transfer	User can verify transfers to or from a restricted custody location	RESTTRANS
Can change Case IOR	Allows user to change the Investigator for a case	IORCHANGE
Can Change Department	User can change the case Department	AC_BOOKAGN
Can change URN	User can edit Complaint #/Agency Case #	URNCHANGE
Can Create CSI Request	Displays CSI Request option under Service Request in Dashboard menu. Allows user to create Crime Scene Investigation service request.	CREATECSIR
Can Create Digi Request	Displays Digital Imaging Request option under Service Request in Dashboard menu. Allows user to create Digital Imaging Request.	CREATEDIGI
Can Edit Container Description	User can edit case container description	EDITCONT
Can Make Delivery Requests	Displays Item List button on Items tab	MAKEDREQ
Can Perform Retention Review	Displays Retention Review button on Case Info tab. User can perform initial review if they are case Investigator or Alternative Investigator	RETREVIEW
Can use Assignment Batch ID		ABATCHID
Can Validate Currency	These users can enter their pin to validate (count) currency amounts on the items tab.	VCURRENCY
Court Monitoring Supervisor Access	Displays Monitor button for Court activities in Activity Log. Allows user to answer to Court Monitoring by Supervisor questions for Court activities	MCRTSUP
Create Item Lists	Allows user to work with Item Lists in Custody Inquiry	CUSTLIST
Create NARCO Service Requests	Displays Narco Request button on Service Requests tab. Allows user to submit NARCO Quick Request for qualifying items	SRNARCO
Create Service Request for Agency Only	User can only create service requests for cases for their agency	SRDEPT
Create Service Request for All Cases	User can create service requests for all cases	SRALL
Disable Add Delete Buttons in Names Tab	Hides Add and Delete buttons on the Names tab	NOEDITNAME
Enable EPADOCX to run	Set if ePad signature pad is used	EPADOCX
Enable Evid Property Approval Barcode	Gives user permission to approve evidence via barcode	EVIDBAR
Enable PLCWEB OCX to run	PLCWEB OCX will automatically download when user logs in to program. Allows use of features that utilize OCX	PLCWEBOCX
Enable TOPAZOCX to run	Set if Topaz signature pad is used	TOPAZOCX
Hide (1) Case Tab	Hides the Case Info tab	HIDECATAB
Hide (2) Submissions Tab	Hides the Submissions tab	HIDESUTAB
Hide (3) Names Tab	Hides the Names tab	HIDENATAB
Hide (4) Items Tab	Hides the Items tab	HIDEITTAB
Hide (5) Custody Tab	Hides the Custody tab	HIDECUTAB
Hide (6) Assignments Tab	Hides the Assignments tab	HIDEASTAB
Hide (7) Reports Tab	Hides the Reports tab	HIDERETAB
Hide Case Container Button	Hides the Container button on the Items tab	HIDECCONT
Hide Kit Button Items Tab	Hides the Kit button on the Items tab	HIDEKIT
Hide Reports Matrix Button	Hides the Matrix button the Reports tab	HIDEMATRIX
Hide Sample Button Items Tab	Hides the Sample button on the Items tab	HIDESAMPLE
Hide Service Request Tab	Hides the Service Requests tab	HIDESETAB
Hide Supplements Button	Hides the Supplements button on the Case Info tab	HIDESUPP
Pull List - Station Pull List	User can print Station Pull List on Pull List Report screen	PLIST1
Pull List - Lab Courier Route Sheet	User can print Pending Lab Courier Route Sheet on Pull List Report screen	PLIST4
Pull List - Pending Transfer to CPE	User can print Pending Transfer to CPE report on Pull List Report screen	PLIST2
Pull List - Staff Request Pull List	User can print Staff Request Pull List on Pull List Report screen	PLIST3
Restrict Item Edit Only for Booked By	User can only edit items they booked into PLIMS. Their name must be selected in the Booked By field in order for them to be able to edit an item record.	EDITBOOKBY
Program Access/PRELIMS/ Inventory		
Can Close Inventory or Batch	Can close any user's inventory or batch	INVCLOSE

Can create a new Inventory	Allows user to create a new inventory. They can create and assign batches for the inventory. They can also edit, print, close, and delete inventory and batches in inventory.	INVCREATE
Can Delete Any Inventory or Batch	Can delete any user's inventory or batch	INVDELETE
Can Finalize Any Inventory	Can finalize, i.e., approve, any inventory. Inventories cannot be finalized by the same user who closed them	INVFINAL
Can perform Container Inventory	Allows user to inventory bulk container contents	CONTINV
Can Print Any Inventory	Can print any user's inventory	INVPRINT
Can Scan Inventory Items	Batches can be assigned to user. User is able to scan locations, items, and containers for a batch. Can also print and close their assigned batches	INVSCAN
Clear Misplaced items	Displays Clear Extra button on Container Inventory screen. Allows user to clear scanned items that are not inside the container.	CONTINVCL
Container inventory Start Over	Displays Start Over button on Container Inventory screen. Allows user to start the inventory over.	CONTINVSO
Unseal a container	Displays Seal/Unseal button Search Bulk Container tab	CONTUNSEAL
Program Access/PRELIMS/ Update		
Access to DBPanel and DBGrid Editor	Allows user to access DBPanel and DBGrid Editor in Configuration	DBPEDIT
Program Access/Lab Asset Management		
Access Chemicals Only	Allows access to the Chemical/Purchased Reagent asset class in Laboratory Asset Manager	CHEMICALS
Access Custom Asset Type Only	Allows access to the Custom asset class in the Laboratory Asset Manager	CUSTOMTYPE
Access Firearms Only	Allows access to the Firearms asset class in the Laboratory Asset Manager	FIREARMS
Access Instrument Only	Allows access to the Instruments asset class in the Laboratory Asset Manager	INSTRUMENT
Access Lab Asset Management Program	Allows user to access the Laboratory Asset Manager	CHEMINV
Access Other Assets Only	Allows access to the Other asset class in the Laboratory Asset Manager	OTHERASSET
Access Reagents Only	Allows access to the Prepared Reagent asset class in the Laboratory Asset Manager	REAGENTS
Access Setup	Allows access to Setup in the Laboratory Asset Manager	CHEMSETUP
Add MSDS Information	Allows the user to add material safety data sheet information in the Laboratory Asset Manager	CHEMMSDS
Can Delete Custody	Allows user to delete asset custody records in Laboratory Asset Manager	LAMCUSTD
Can Edit Custody	Allows the user to edit records on the Custody tab in the Laboratory Asset Manager	LAMCUSTE
Can Edit Exhausted Asset	Allows user to edit assets marked as "Exhausted" (common with drug standards)	EDITEXHA
Can Manually Add Custody	Allows user to add custody records with Add button on Custody tab in Laboratory Asset Manager	LAMCUSTA
Can edit calibration reports		INSTCALI
Delete MSDS	Allows the user to delete material safety data sheet information in the Laboratory Asset Manager	DELMSDS
Inquiry Mode	Restricts user to read-only in Laboratory Asset Manager. The user will be unable to add, edit, or delete asset records.	LAMINQ
Restrict Adding LAM Record	Restricts user from adding asset records in the Laboratory Asset Manager	RADDLAMR
Restrict Changing Section	User can only view assets assigned to their Cheminv Default Section	RCNGSECT
Restrict Deleting LAM Record	Restricts user from deleting asset records in the Laboratory Asset Manager	RDELLAMR
Restrict Editing LAM Record	Restricts user from editing asset records in the Laboratory Asset Manager	REDTLAMR
Restrict Instr Calibr History Editing		REDINCLHIS
Program Access/LIMS		
Can Delete Locked Records	Allows the user to delete locked records in the LIMS	DELLOCKS
Program Access/LIMS/ Configuration		
Access Code Tables Program	Gives user access to a program that just makes codehead tables available for edit	CODECON
Access Codes Tab	Allows user to access Codes tab and modify codes in Config	CFG-CODE

Access Configuration Program	Allows user to access Configuration area	CONFIG
Access Defaults Tab	Allows the user to access the Defaults tab in Config	CFG-DFLT
Access Departments Tab	Allows the user to access the Departments tab in Config	CFG-DEPT
Access Locations Tab	Allows the user to access the Locations tab in Config	CFG-LOCA
Access Waiting List Program	The Waiting List is a separate program that provides a list of submitters in a waiting room.	WAITLIST
Can edit Department Info - DeptName	Allows the user to edit the Department Information for a record on the Departments tab in Config	DEPTNAMEED
Can have full Access - DeptName	Allows the user full access to add and delete on the Departments tab in Config	DEPTNAMEFA
Can View Analyst Signatures	Allows user to view an analyst's active signature from the Users tab in Config	VIEWANLSIG
Department List	This gives a user access to the Departments tab in Config	DEPTNAME
Disable Web Users Tab	Restricts access to the Web User tab in Config	CFG-WEBU
Edit User Information	Grants access to the Users tab in Config. Allows user to edit user profiles	EDITUSER
Restrict User Access to Departments Tab	Prevents user from accessing the Departments tab in Config	RESCONDEPT
Program Access/LIMS/ Evidence Receiving		
Access Quick Label Printing	Displays speed label button on Quick Create screen so that a case number can be pulled to reserve the case(s) needed.	LABELS
Access Receiving Program	Grants user permission to run the Evidence Receiving program	RECEIVE
Add New Lab Cases	Allows user to create new lab cases	ADDCASE
Can Approve Supplies	Allows the user to approve supply orders from others in the lab using Supply Order feature	APPRSUP
Can Assign Worklist to others	Allows user to pull a work list and change the assigned analyst.	ASSIGNWRKL
Can Change Item process	Allows user to change the Process for an item	ITEMPROS
Can Create Addendum Reports	This feature allows a lab to create additional addendum reports that are linked and can be printed together.	MAKEADDUM
Can Enter QC Received By	Enables Received By fields on the Quick Create screen	QCRECBY
Can Expunge Samples	For DNA Databank: Allows user to expunge an offender sample.	EXPUNGE
Can maintain others worklist	Allows the user to maintain a work list created by another user on the Worklist and Batch screens	MWORKLIST
Can Order Supplies	Allows the user to order lab supplies using the Supply Ordering feature	ORDERSUP
Can Preview Approved Reports	After a report is approved, the user can view the report from the Reports tab	PREVREPT
Can Recapture Batch Signature	This enables the ability to recapture the signature on the submission tab for the entire batch if High volume user was turned on at QC.	RECAPSIG
Can Regenerate Approved Report	Allows users to regenerate an approved report. Usually limited to Supervisors/Sys Administrators.	REGENRPT
Can Reset approved reports	Allows the user to reset reports once they’ve been approved. This will gray out the report on the reports tab and automatically create an assignment on the Assignments tab. All data from the reset report will still be in the new assignment.	RESETREPT
Can Verify Custody Transfer	If a transfer requires a verifier, allows the user to act as a verifier.	VERIFYTRAN
Can view others pending assignments	Allows the user to see assignments for other analysts.	VOTHERSA
Can View Routing History	This enables the user to access the information behind the Routing history button on the assignments tab.	ROUTEHIST
Cannot Edit Assignment Analyst	Prevents the user from changing the analyst that is assigned to an assignment.	NOEDITAA
Change Lab Case Number	If this option is selected, the user is able to change the lab case number assigned to a case. This option should be restricted.	CHANGECASE
Change Report Number	Report numbers are generated sequentially by the system. However, if it becomes necessary to modify a report number, only users with this option selected can do so.	RPTNUM
Default Analyst on Assignments	This field is not currently being used	DEFAULTA
Delete Approved Reports	This enables the button on the reports tab for this user.	DELREPT
Delete Assignment Information	Allows the user to delete assignment information.	DELASSGN

Delete Cases	Allows the user to delete cases. Usually restricted to System Administrators / PLC personnel.	DELCASE
Delete Documents From Image Vault	Allows the user to delete documents from the Image Vault.	DELDOC
Delete Items	Controls the ability of the user to delete items. If a user does not have this authority he can ask a supervisor to enter his password. A reason must be specified. All deleted information is stored in the audit log.	DELITEM
Delete Narrative	Allows user to delete information found in the Case Narrative.	DELSTORY
Disable Assignment Button	This disables the Assignment button from the main screen.	DSBLASSG
Disable the Attributes search tab	This disables the Attributes search tab in Find a Case window	DSATTR
Disable the By Case search tab	This disables the By Case search tab in Find a Case window	DSCASE
Disable the By Name search tab	This disables the By Name search tab in Find a Case window	DSNAME
Disable the My Assignments search tab	This disables the My Assignments search tab in Find a Case window	DSASSIGN
Disable the My Reports search tab	This disables the My Reports search tab in Find a Case window	DSREPT
Disable the Pending search tab	This disables the Pending search tab in Find a Case window	DSPEND
Disable the Recent search tab	This disables the Recent search tab in Find a Case window	DSRECENT
Disable the Reference search tab	This disables the Reference search tab in Find a Case window	DSREF
Edit Activity	Allows the user to edit information in the Activity module.	EDITACT
Edit Assignment Information	This option allows a user to edit case assignments. In a lab where work assignments are made by a supervisor, this option would be given to the supervisors. If this is not selected, it will prevent analysts from picking their own cases.	EDITASSGN
Edit Department Case Number	Select this option to allow the user to edit the case number from the submitting agency (department).	EDITDEPT
Edit Forms For Others	This allows a user to edit a form on the case info tab when it was created by another user.	EDITFORM
Edit Help Information	Allows the user to edit the online help topics. Pressing F1 will bring up the help windows if this feature is enabled.	EDITHELP
Edit Images	This allows the edit of item detail information for an image vault attachment	EDITIMAGES
Edit Link Names to Submissions	When lab control flag "Link Names to Subs" is set to True, this flag will enable the "edit" button for the user to change which submissions a user is referenced to	LINKSNAMES
Edit or Delete Approved Reports	Allows the user to open and edit reports after they have been approved.	EDITAPPR
Edit Reports for Others	Selecting this option allows the user to edit lab reports assigned to another user. This enables someone to type lab reports for the analysts.	EDITREPORT
Edit Submission Link Information	This allows the user to edit the submission item link information on the submission tab.	SUBLINK
Edit Tasks	Allows user to edit the tasks for an assignment. These tasks are used in conjunction with the Worklists feature for Toxicology / DNA.	EDITTASK
Edit/Delete Any Narrative	Allows user to delete/edit case narratives.	EDITSTORY
Inquiry Mode	This sets all tabs to read only for a user. This can be used for an auditor.	RECEIVEINQ
Lock or Unlock Cases	The Evidence Receiving program has the ability to lock a case. If a case is locked, only users who currently have custody of evidence for the case can access it. System administrators can lock and unlock cases.	CASELOCK
Manage Assignments	Allows user to merge and split assignments	MNGASSIGN
Print Bar Code Labels	Grants the user the ability to print barcode labels.	PRINTBAR
Remove DA Case Restriction	Grants the user permission to remove the DA case restriction from a lab case.	DELDALOCK
Restrict Access by Submission Type	This restricts access to a case by the submission type.	RESSUBTYPE
Restrict Creating of Bulk Containers	Prevents user from creating Bulk Evidence Containers (containers that contain items from more than one case).	RESBULK
Restrict Delete Narrative	Prevents user from deleting case narrative information.	RESDELNAR
Restrict Deleting Own Assignment	Prevents user from deleting their assignments.	RESOASGN
Restrict Edit/Delete Supplement	Prevents user from editing/deleting Case Supplements (accessed using the Supplements button on the Case Info tab).	RESSUPPTBL

Restrict Editing Date Assigned Field	This setting prevents user from editing the Date Assigned field for completed reports shown on the Reports tab.	RESDATEASS
Restrict Editing of Narrative	Restricts user from editing case narratives (Narrative button on Case Info tab).	RESEDNAR
Restrict Submission Adding	This disables the Submission Add button for a user.	RESSUBMADD
Restrict Submission Editing	This restricts the Submission Edit button for a user.	RESSUBMED
Review Prosecutor Request All Labs	There is a prosecutor web-site where prosecutors can make a request. This permission allows the end user to review the request on an assignment for labs where the assigned lab matches the user's lab code.	PROSREQALL
Review Prosecutor Request Assigned Lab	There is a prosecutor web-site where prosecutor can make a request. This permission allows the end user to review the request on an assignment for labs where the assigned lab matches the user's lab code.	PROSREQLAB
Save Documents To Image Vault	This allows a user to attach a document to the image vault.	REPSAVE
See Assignments	Allows the user to see assignments in the Assignments tab. This option only applies to Police users of the LIMS.	SEEASGN
See Reports	Allows the user to see reports in Evidence Receiving application. This option only applies to Police users of the LIMS.	SEEREPT
Select Lab Code	Allows the user to select lab codes (effectively allowing them to switch labs).	SELCODE
Uses Assignment Request Type	This enables a request type field on the assignment.	REQUEST
Uses Worklists	This program is for the toxicology or other batch processing modules that incorporates the use of Worklists. Enables the Worklist button on the main receive screen for the user.	WORKLIST
View Completed Reports	Allows the user to view reports from the Reports tab.	COMPREPT
Program Access/LIMS/ Evidence Receiving/Custody		
Can use Custody Add Button	Allows the user to manually add an entry into the chain of custody of an item directly from the Custody tab. Access should be limited to system administrator or PLC. These changes are still recorded in the audit log.	CUSTODYADD
Can Use Transfer Button	Chain of Custody is usually accomplished using the barcode scanner. Users can be given the ability to do manual chain of custody by selecting this option. This grants permission to use the custody Transfer button from the Items tab in Receive.exe.	MANUALCUST
Custody Override	Allows user to override the requirement to have custody of an item you are transferring.	CUSTOVER
Edit/Delete Chain of Custody	If this option is selected, a user will be able to change or delete chain of custody records. These changes are still recorded in the audit log.	EDITCHAIN
Handle Evidence	A user can have custody of evidence if this option is selected. Should disable this option for people who do not need to take custody of evidence, or for employees who no longer work in the lab. If this option is not selected when a user attempts to take custody of evidence, a message will be displayed. Note: If you select “Can Handle Evidence” a storage location (custody code) for this analyst will be created automatically.	HANDLE
Program Access/LIMS/ Evidence Receiving/DNA Case Work		
Access to Batch QCCHECK	For DNA Databank, batch quality control feature. Allows user to use the batch QC feature.	QCCHECK
Can Access Closed DNA Worksheets	Allows user to continue to access a Worksheet after it has been closed (ordinarily these are not available).	DNACWRK
Can Edit Plate ID	This allows the user to edit the Plate ID in the DNA module.	EDITPLID
Can Override Max Extraction Samples	This allows the user to edit the max number on the work list screen.	MXSMPOVR
Restrict DNA Manual Quant Update	DNA Casework: Prevents user from doing manual quantitation updates.	RDNAQNTUPD
Program Access/LIMS/ Image Vault		
Attach Images	For Image Vault: allows user to attach files/images to case/item/assignments.	IVATTACH
Copy Images	For Image Vault: allows user to copy files.	IVCOPY
Delete Images	For Image Vault: allows user to delete files.	IVDELETE
Edit Image Information	For Image Vault: allows user to edit the file information.	IVEDIT

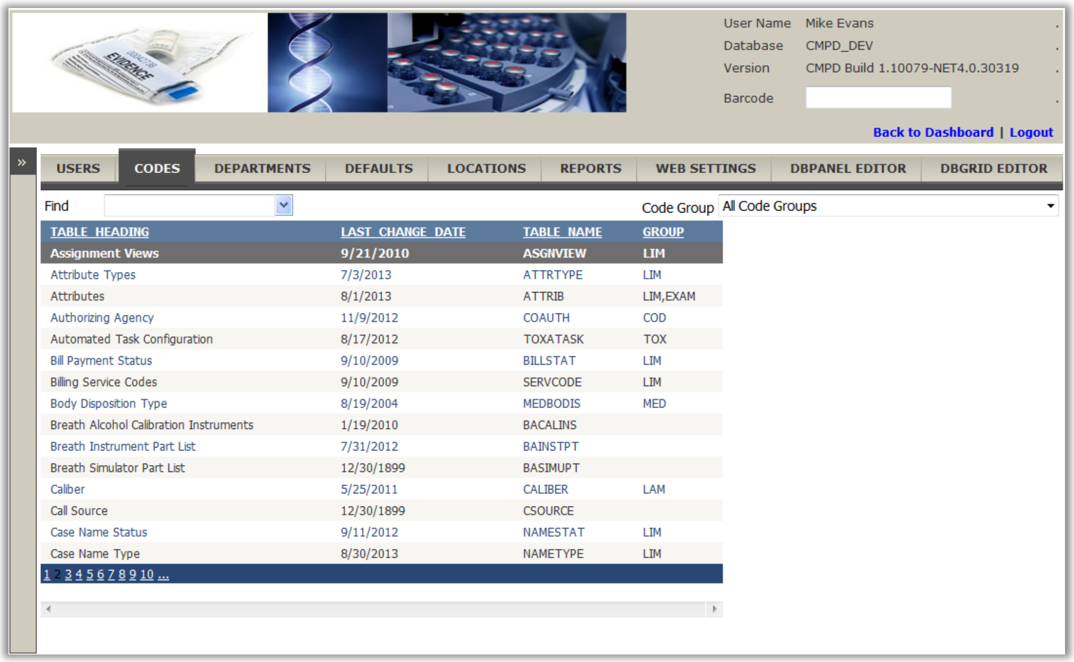
Export Images	For Image Vault: enables the export feature in image vault. Allows the user to send images to a directory outside of the database.	IVEXPORT
Print Images	For Image Vault: enables the user to print any stored image/file.	IVPRINT
Restrict Approved Report Image Delete	This is an Image Vault restriction on the Reports tab of the case.	IVAPPDEL
Restrict Approved Report Image Edit	This is an Image Vault restriction on the Reports tab of the case.	IVAPPEDIT
Restrict Save to File	This only allows the user to save an image to a file	IVNOSAVE
Scan Images	For Image Vault: enables the Scan button so that the user can scan images with an attached scanner or other imaging device.	IVSCAN
View Images	For Image Vault: enables image vault for the user.	IVVIEW
Program Access/LIMS/ Other		
Access Inventory All	In the remote inventory program this gives you access to all inventories.	INVALL
Access Inventory Current User	In the remote inventory program this gives you access to only the logged on user inventories	INVUSER
Access Inventory For Department	In the remote inventory program this gives you access to all inventories for this department	INVDEPT
Access LABSEND Program	This gives users the ability to open up cases and transfer items to remote laboratories existing on their own servers, but still within the same laboratory system.	LABSEND
Access the Audit Log Program	Selecting this option grants permission to run the Audit Log program. Access should be limited to system administrator or PLC.	AUDITLOG
Access the Report Wizard Editor	Selecting this option grants permission to run the Report Flowchart Editor program.	WIZEDIT
Allow Item Due Monitoring	This is used primarily for pull-lists in a property room, also if items are set to be back from court or another trigger.	ITEMDUE
Can Cancel Requests and items	Enables the Cancel Request and Cancel Item buttons on the Pending Supply Request(s) tab in the Evidence Receiving program and on the Supply Request(s) tab in the Chemical Inventory program.	CNCRREIT
Can Create Purchase Orders	Enables the Create PO button on the Supply Request(s) tab in the Chemical Inventory program. This allows users to create purchase orders for approved supply requests.	CNCRPORD
In / Out Board Edit All Entries	Allows user to edit all of the entries in the In/Out board module.	INOUTBEALL
In / Out Board Edit Extra Entries	Allows user to edit Extra entries in the In/Out board module.	INOUTBEEXT
Program Access/LIMS/ Quality Management		
Analyst Cannot Edit Proficiency Test	User will be unable to edit their assigned proficiency tests from the main LIMS program	QMS-EDITPT
Can approve Audits and CAs	Allows user to approve reports and to edit and delete approved reports.	QMS-APPACA
Can Attach to Completed Milestones	Allows the user to create, scan, edit, and remove attachments from completed milestones	QMS-ATTACH
Can Check In Out Documents	Check in and check out documents assigned for review	QMS-CHIODC
Can Delete Attached Docs	Allows user to delete documents in the QMS Image Viewer	QMSDELA
Can Delete Milestone Reviews	Allows the user to delete reviews from the selected milestone	QMS-DELMRV
Can Delete Proficiency Test	Allows the user to delete proficiency tests. Enables the Delete Test button on the Proficiency Test screen.	QMS-DELPT
Can Delete Program	Allows user to delete QMS Program codes	QMS-DELPRG
Can Override Milestone Signoff	These users can enter milestone completion for other users	OVMLSIGN
Can Scan Images	Allows the user to scan images from the QMS Document Viewer.	QMS-DSI
Can Set Milestone Status	Allows user to set status of milestones assigned to other users.	QMS-SETMSS
Can Unassign QMS Program/Milestone	Enables Un-Assign button in program Assignments window. Allows user to un-assign selected milestone(s)	QMS-PROGU
Document Administrator	N/A	DOCADMIN
Program Access/LIMS/ Remote		
Access LAM Transfer program	Allows user to access the transfer program for the Laboratory Asset Manager.	LAMTRANS

Access Palm RF Program	This program is necessary for individuals using the palm-pilot radio frequency setup.	PALMRF
Access Remote Custody Update	Grants permission to run the palm-based remote custody update program.	RMTCUST
Access Remote Inventory	Selecting this option grants permission to run the Remote Inventory program.	INVENTORY
Access Remote LAM Inventory	Allows the user to use the remote inventory application with Lab Asset Manager.	LAMINV
Access the Remote Custody Program	Allows the user to use the palm-based remote custody application with the Palm computer.	CUSTODY
Access the Remote Transfer Program	Allows the user to use the palm-based remote transfer application.	TRANSFER
Program Access/LIMS/ Reports		
Access Management Reports	Selecting this option grants permission to run the Management Reports program.	REPORTS
Restricted Managment Reports	Restricts the use of Management Reports	REPORTS_R
Unrestricted Management Reports	Allows user to run management reports for all sections/labs in the enterprise.	UNRESTRICT
Program Access/CODNA		
Access CODNA Program	This allows the user to have access to the CODNA module (Convicted Offender DNA Database). Not utilized by all labs.	CODNA
Access Convicted Offender Hit Statistics	Allows the user to generate the convicted offender hit statistics crystal report. Must have the Access CODNA Program feature selected as well.	CODNAHIT
Access Transfer/CMF Program	Provides access for a user to the transfer/CMF program	TRANCMF
Acess CODNA Audit Log	Allows access to the Audit Log for the CODNA application.	COAUDITLOG
Delete CO Documents From Image Vault	Allows the user to delete convicted offender docs stored in the Image Vault (scanned sample cards, for example).	DELCODOC
Delete Convicted Offender Samples	If your lab utilizes the CODNA module (Convicted Offender DNA Database), selecting this option allows the user to delete records from the database. Allows the user to delete the convicted offender sample record. Must have the Access CODNA Program feature selected as well.	DELCODNA
Do Manual Chain Of Custody	Allows the user to manually enter/modify the chain of custody for CODNA samples. Must have the Access CODNA Program feature selected as well.	COMANCUST
Print and Do CO Duplicate Samples	If your lab utilizes the CODNA module (Convicted Offender DNA Database), selecting this option allows the user to run the Duplicate Samples report which checks for existing or duplicate DNA samples in the database.	DUPCODNA
Print Convicted Offender Expunge Report	Allows the user to generate the convicted offender expungement crystal report. Must have the Access CODNA Program feature selected as well.	CODNADEL
Program Access/COBIS		
Access COBIS Program	Allows the user to access the COBIS program.	COBIS
Allow editing COBIS records for others	Allows access/edit of other analyst’s COBIS records.	EDITCOBIS

CODES TAB

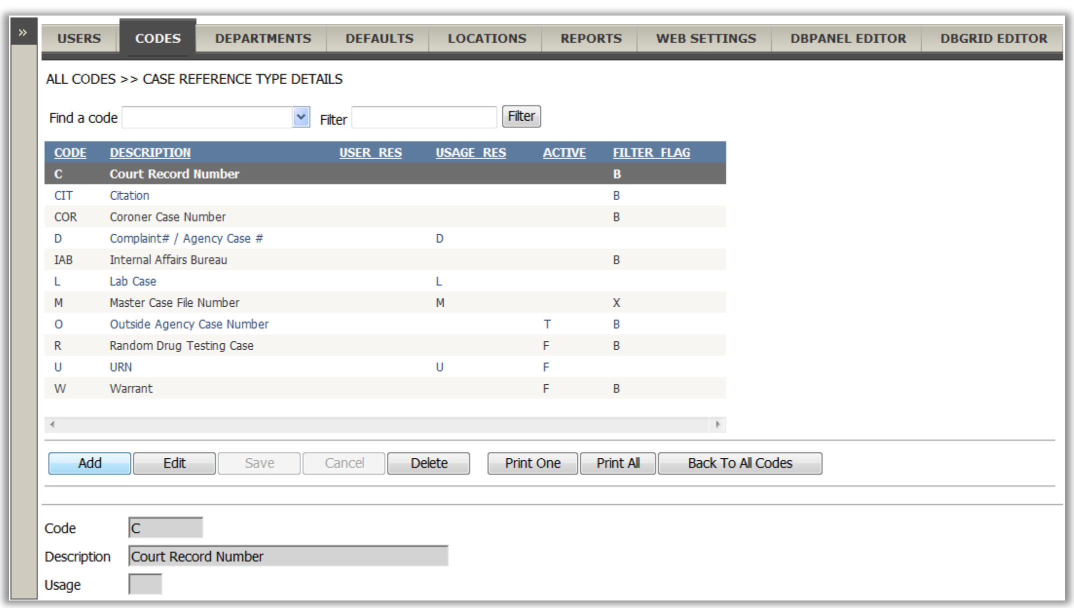
The PLIMS is highly customizable. This is largely due to the extensive use of codes throughout the system. Codes are used so that you can insert a variety of variables into a standard framework. Most code creation and maintenance is performed on the Codes Tab in Configuration.

Figure 15: Codes tab



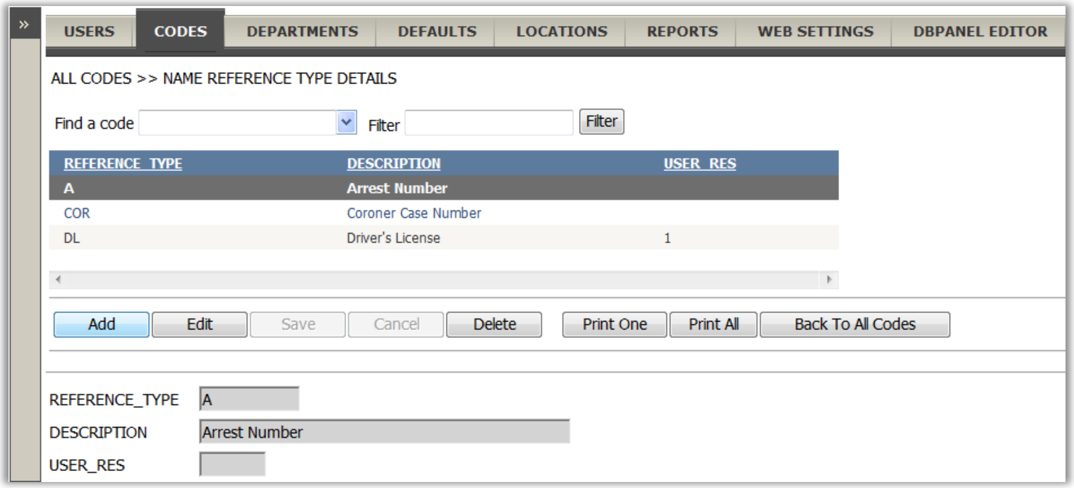
CODE MAINTENANCE

Selecting a table on the Codes tab displays a table maintenance screen like the one shown below. The name and number of fields on the screen will vary depending upon the selected table.



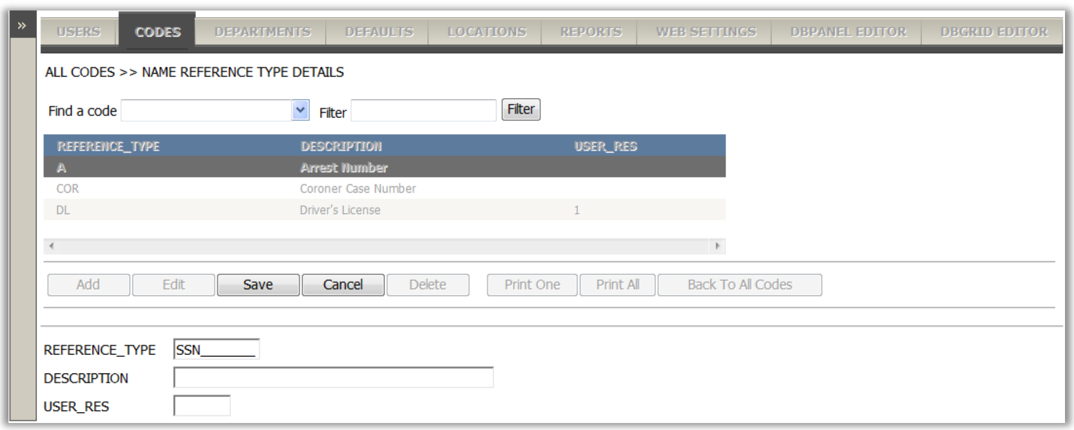
The followings steps show how to add a code to a table from the Codes tab. Once you add a code, you can edit the description, and possibly other fields, at any time by selecting the code in the table and clicking the **Edit** button.

1. Select the code table on the Code tab.
2. Click the **Add** button on the code table details screen.



3. Enter a code in the **Code** field.

NOTE The field name may be different, depending upon the table.

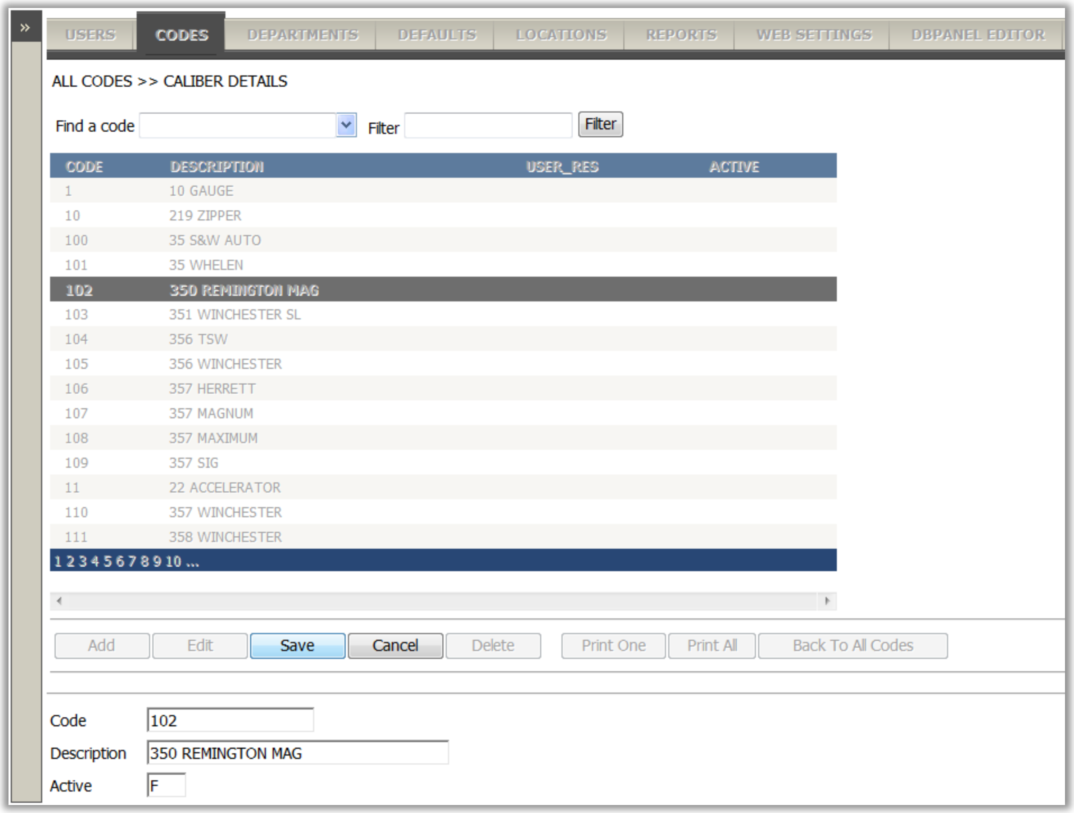


4. Enter a description for the code in the **Description** field.
5. Enter any additional information and then click **Save.**

DEACTIVATING CODES

It is recommended that you deactivate codes rather than delete them, in case the code is associated with records in the system. To deactivate a code, select the code in the code table and click the **Edit** button. Set the **Active** field to 'F' and then click **Save**. The code will no longer appear in picklists in the PLIMS, but it will remain associated with existing records in the system.

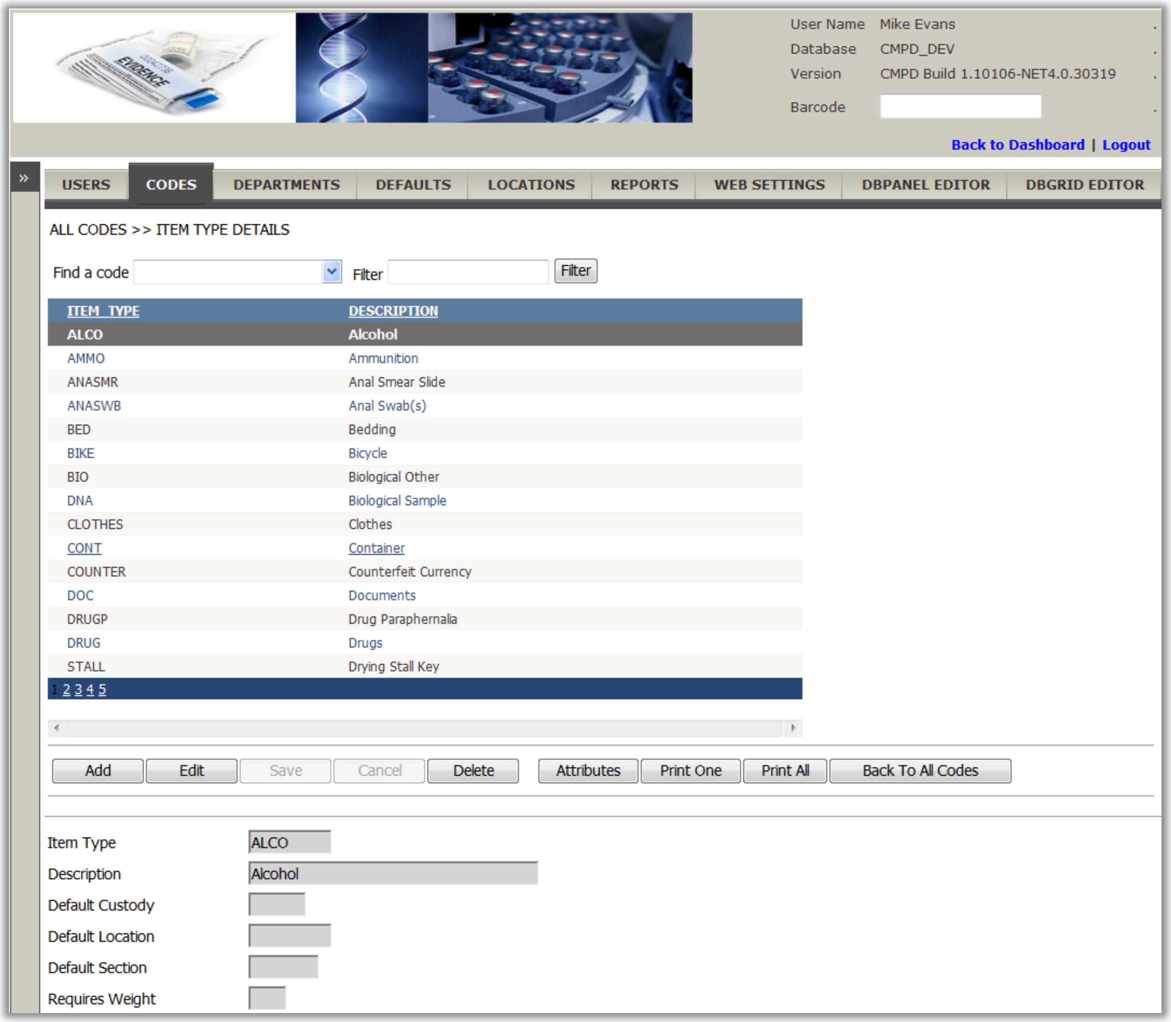
Figure 16: Deactivated code



ITEM TYPES

Item type codes allow you to identify, track, and count different types of evidence submitted to the laboratory. Selecting the Item Type table on the Codes tab will display the Item Type Details screen, shown below.

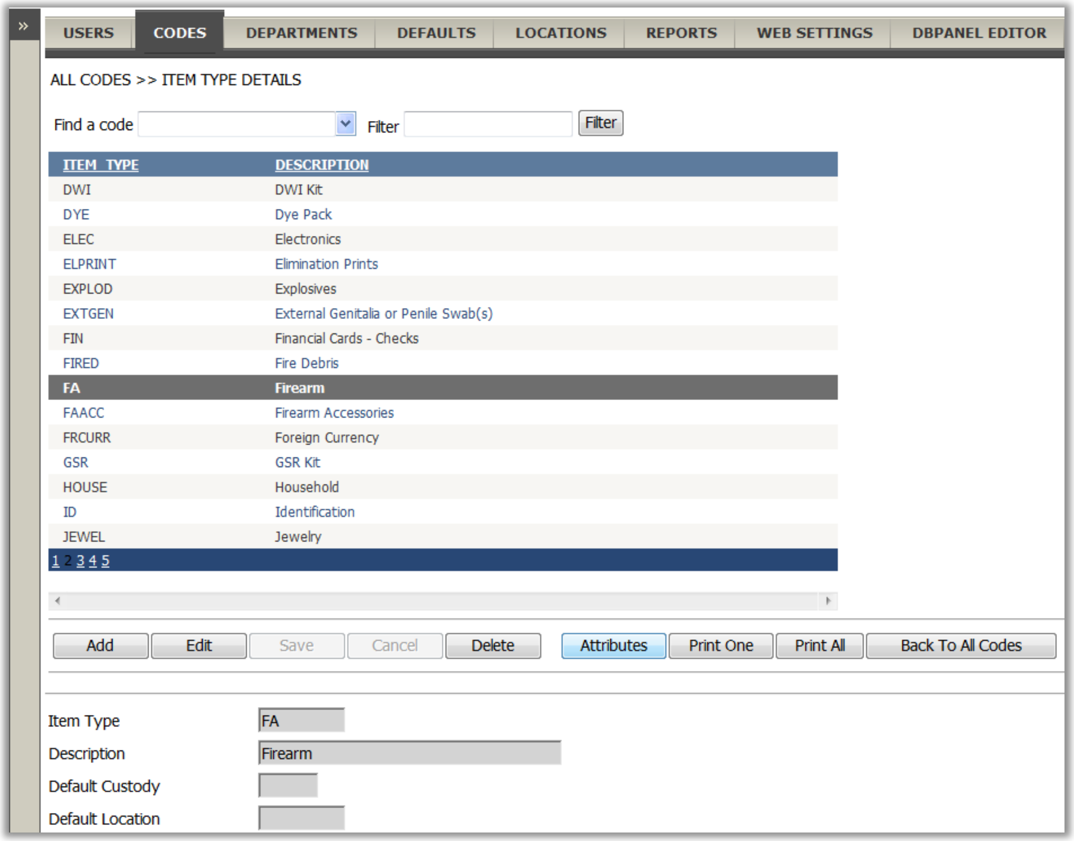
Figure 17: Item Type table



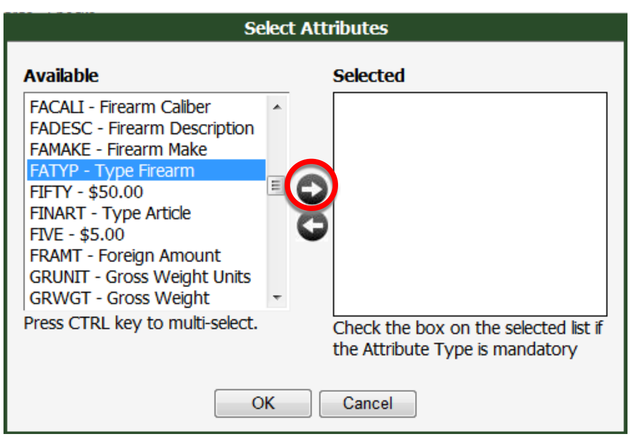
ASSIGNING ATTRIBUTES FOR ITEM TYPES

Attributes are assigned to item types to further define characteristics of the item. For example, a Firearm item type could have attributes for Make, Model, Serial Number, and Caliber assigned to it. Entry fields for the assigned attributes will appear on the Items tab when a record for that item type is entered in PLIMS.

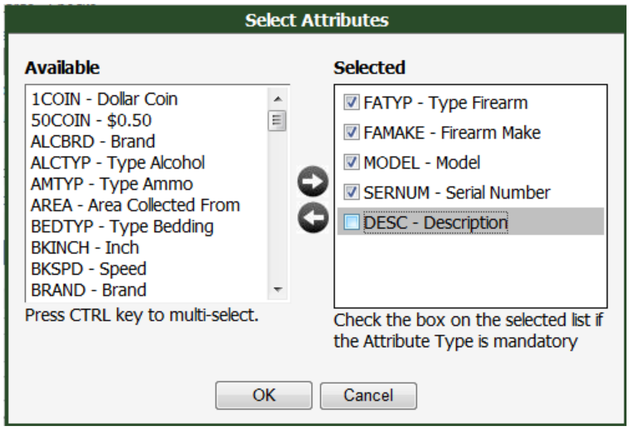
1. Select the Item Type on the Item Type Details screen and click the **Attributes** button. The Select Attributes screen will display.



2. Select the attribute you want to link to the item type in the Available list, on the left side of the screen. Then click the right arrow button. The attribute will be moved to the Selected list on the right side of the screen. Repeat this step for each attribute you want to link to the item type.



3. Checking the box for an attribute in the Selected list will make the attribute mandatory. This means it will be required to save records for that item type on the Items tabs. Check the box next to attributes that should be mandatory. Make sure the box is unchecked for attributes that are not mandatory.

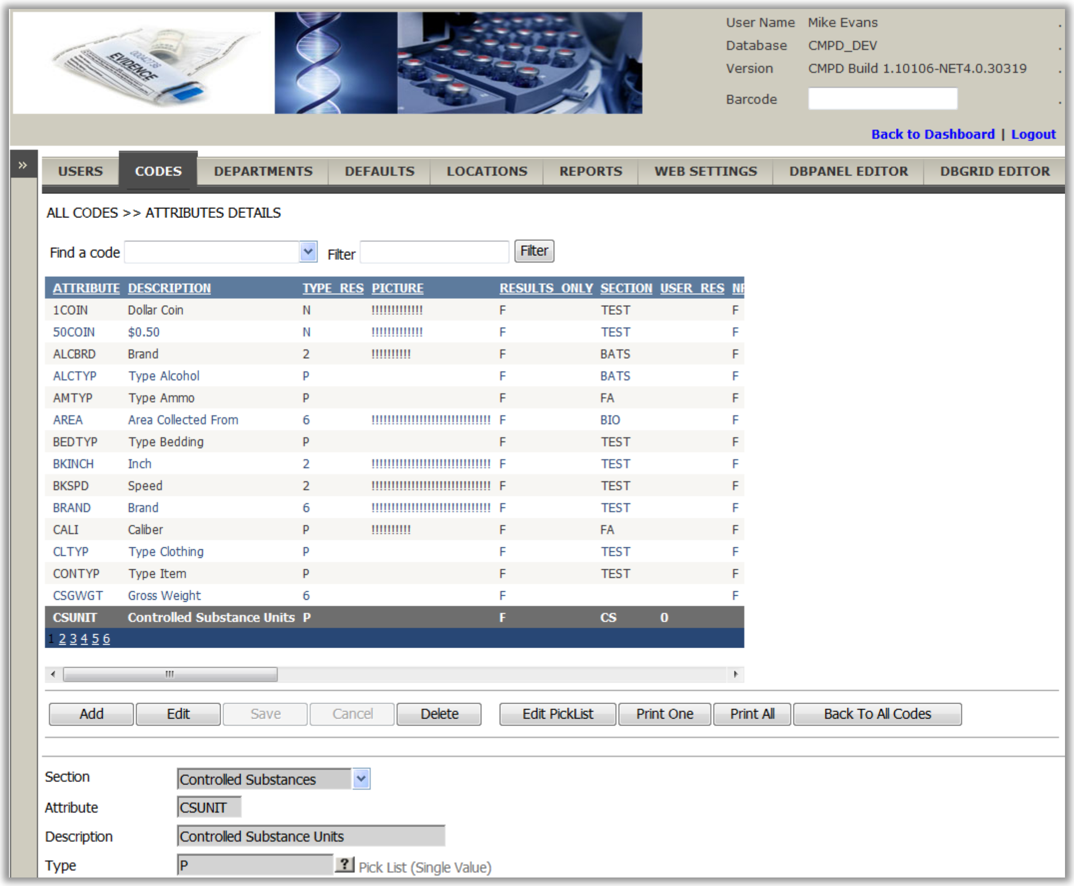


4. Click **OK** once you are finished.

ATTRIBUTES

Attributes are used to extend and enhance the type of information you can collect and report on in PLIMS. Attributes can be assigned to item types to further document the characteristics of an item. Attributes are defined in the Attributes table. Selecting the Attributes table on the Codes tab will display the Attributes Details screen, shown below.

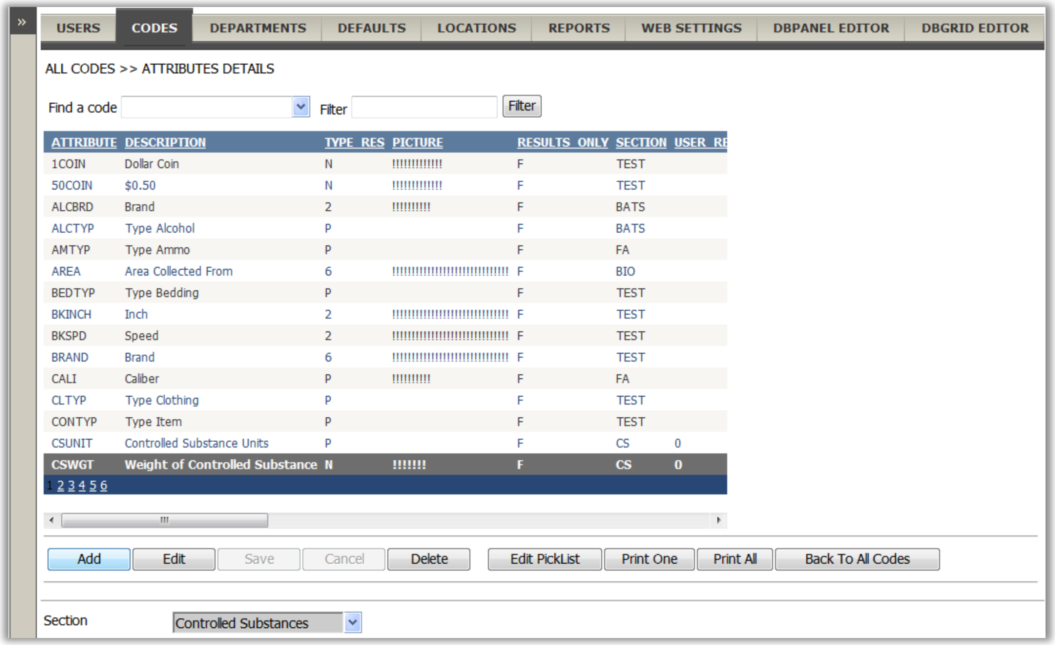
Figure 18: Attributes Details screen



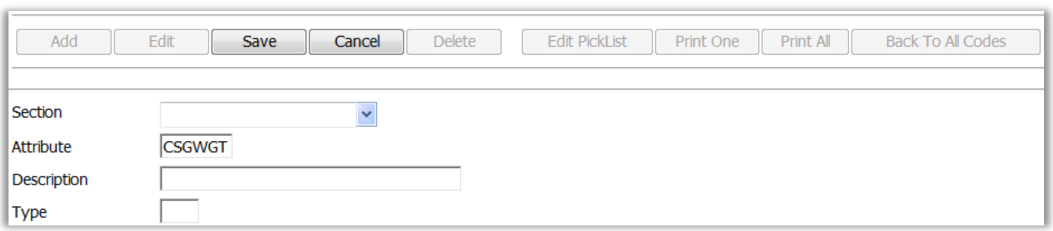
ADDING ATTRIBUTES

The following steps show how to add an attribute for an item type.

1. Click the **Add** button on the Attributes Details screen.

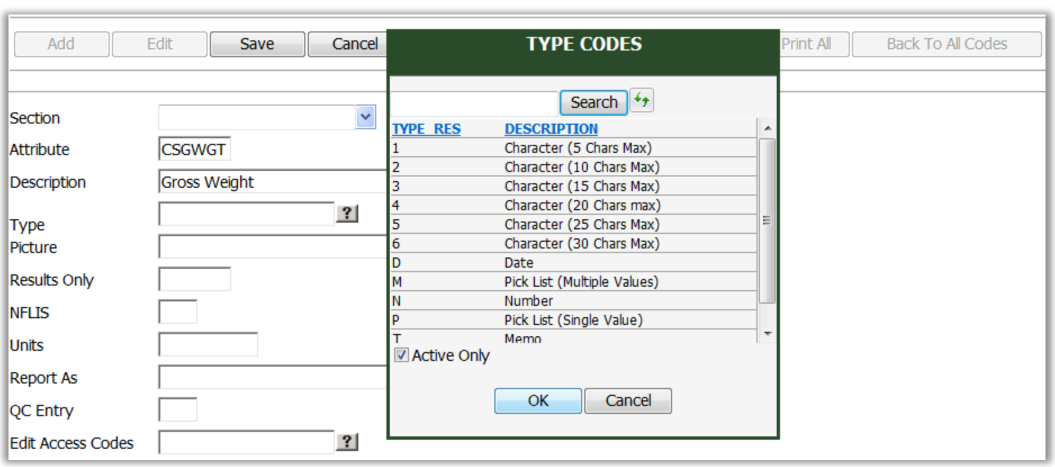


2. Enter a code for the attribute in the **Attribute** field.

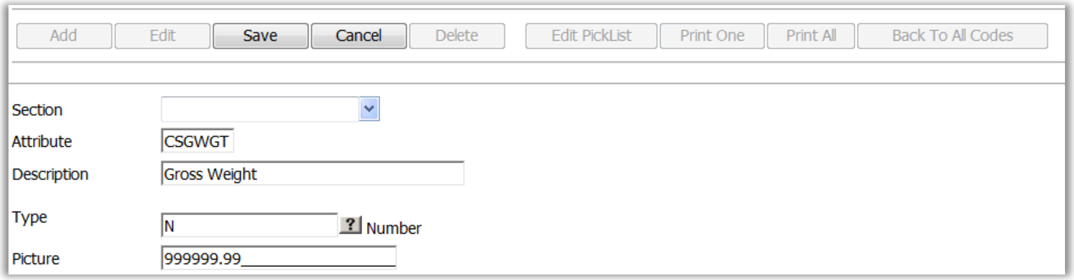


3. Enter a **Description** for the attribute.

4. Select the data **Type** for the attribute. You can select several data types for an attribute. If you need numerical sums and averages from the attribute, select a numeric type. If you are entering character information, select the smallest character type that will fit your information. This will save you space on your server.



5. The **Picture** field further determines what the user can enter for the attribute. Use an exclamation point "!" for upper case characters, "X" for any character, or the numeral "9" for numeric characters. For example, "999.99" would allow the user to enter a number between 0.00 and 999.99. The picture "!!!!!!!" would allow the user to enter 7 uppercase characters.

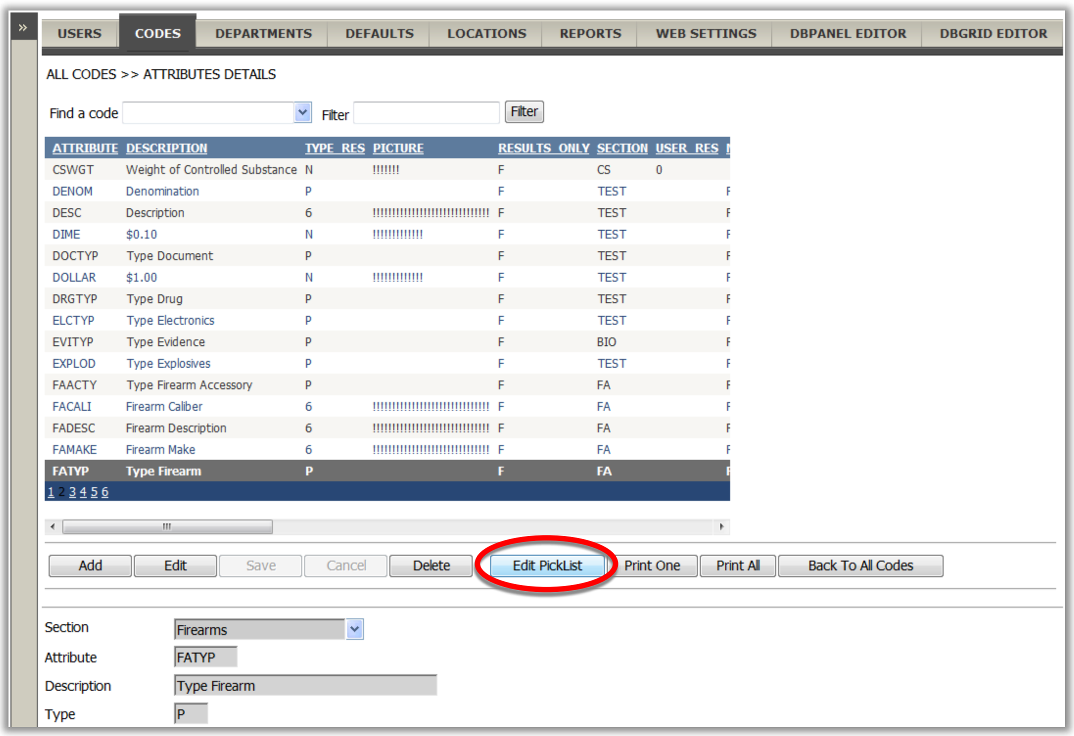


6. Enter any additional information and click **Save**.

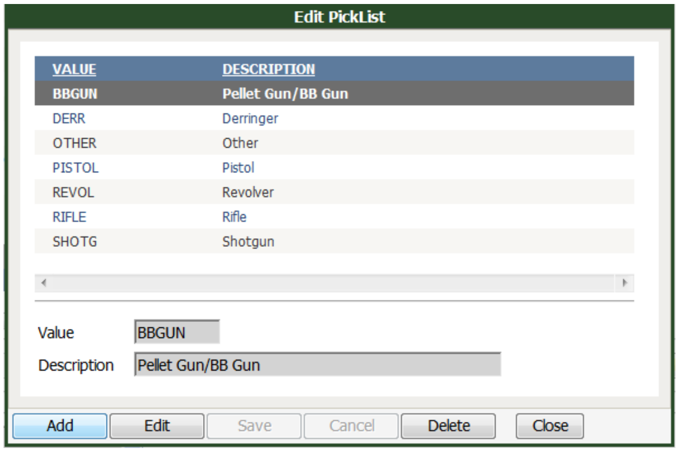
PICK LISTS

Some attributes will have pick lists associated with them. A pick list is a listing of options relating to an attribute. For example, an attribute of "Handgun Manufacturer" could have a pick list of all known handgun manufacturers assigned to it.

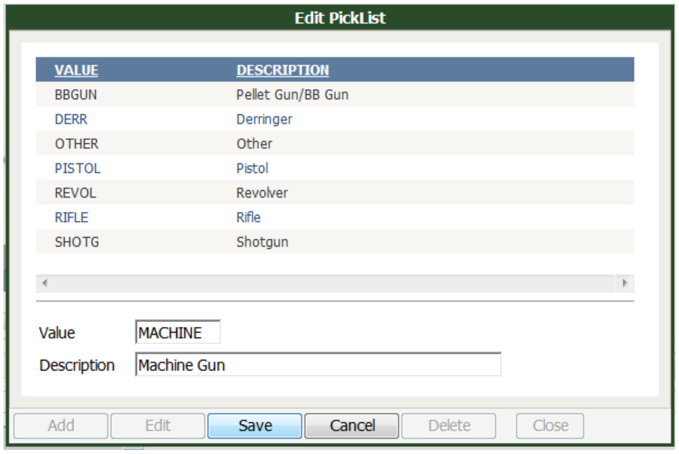
1. Select the attribute on the Attribute Details screen and click the **Edit Picklist** button.



2. Click the **Add** button on the Edit Picklist screen.



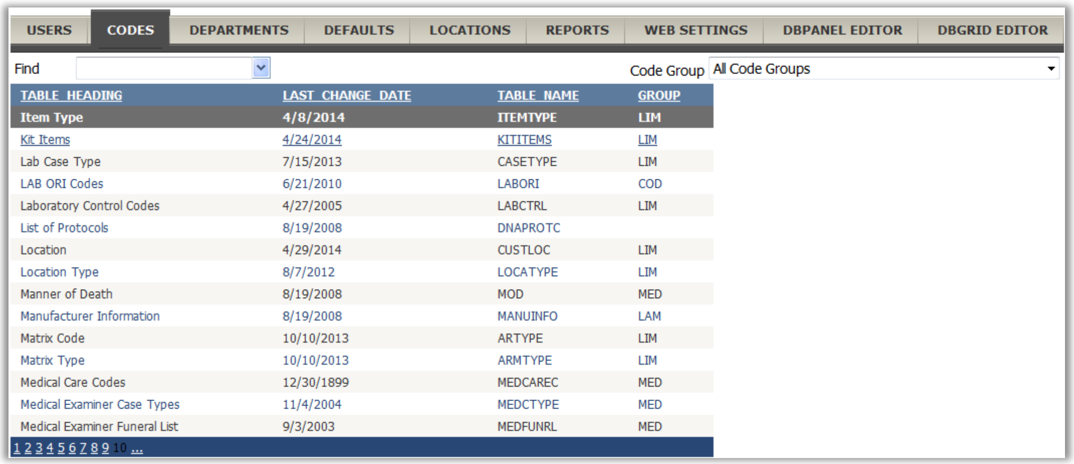
3. Enter the **Value** and the **Description**, and then click **Save.**



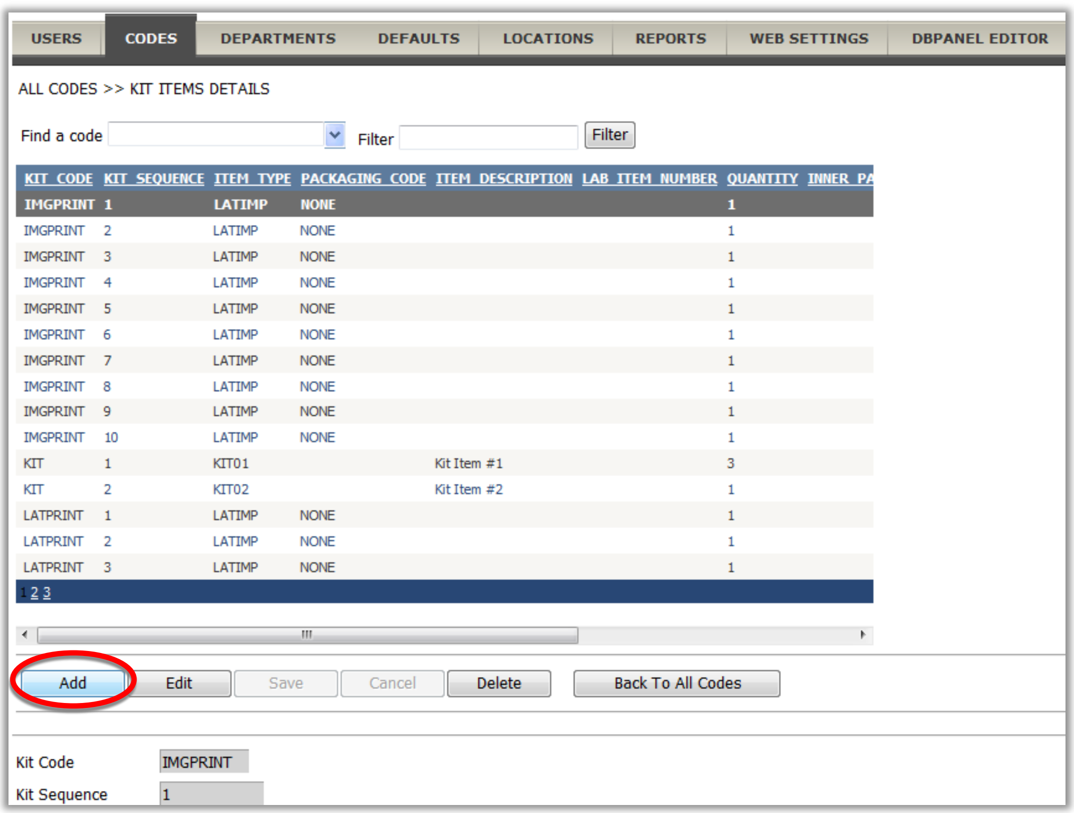
KIT ITEMS

Kits allow you to create item types that represent laboratory analysis kits, such as a sexual assault kit or a DUI kit. Kit items are entered into the Item Type table just like any other item type. The kit item is further defined to contain other existing item type codes in the Kit Items code table. For example, a sexual assault kit might contain a vaginal swab, oral swab, underwear, etc. The following procedure shows how to add an item to kit in the Kit Items table.

1. Verify that kit and each of its components is entered in the Item Type table.
2. Select the **Kit Items** table on the Codes tab. The Kit Items Details screen will display.



3. Click the **Add** button on the Kit Items Details screen.



4. The **Kit Code** identifies the kit that you want to add the item to. Enter the Item Type code for the kit item in this field. For example, if you are were adding an oral swab to a sexual assault kit, you would enter the Item Type code for the sexual assault kit.

5. Enter the **Kit Sequence**. The Kit Sequence determines the order in which items will be created when they are added from the kit. Items with the same Kit Code cannot have the same Kit Sequence. Each entry in the Kit Items table must have a unique Kit Code/Kit Sequence combination.

6. Enter the Item Type code for the item that you want to add to the kit in the **Item Type** field. For example, if you are were adding an oral swab to a sexual assault kit, you would enter the Item Type code for the oral swab in this field.

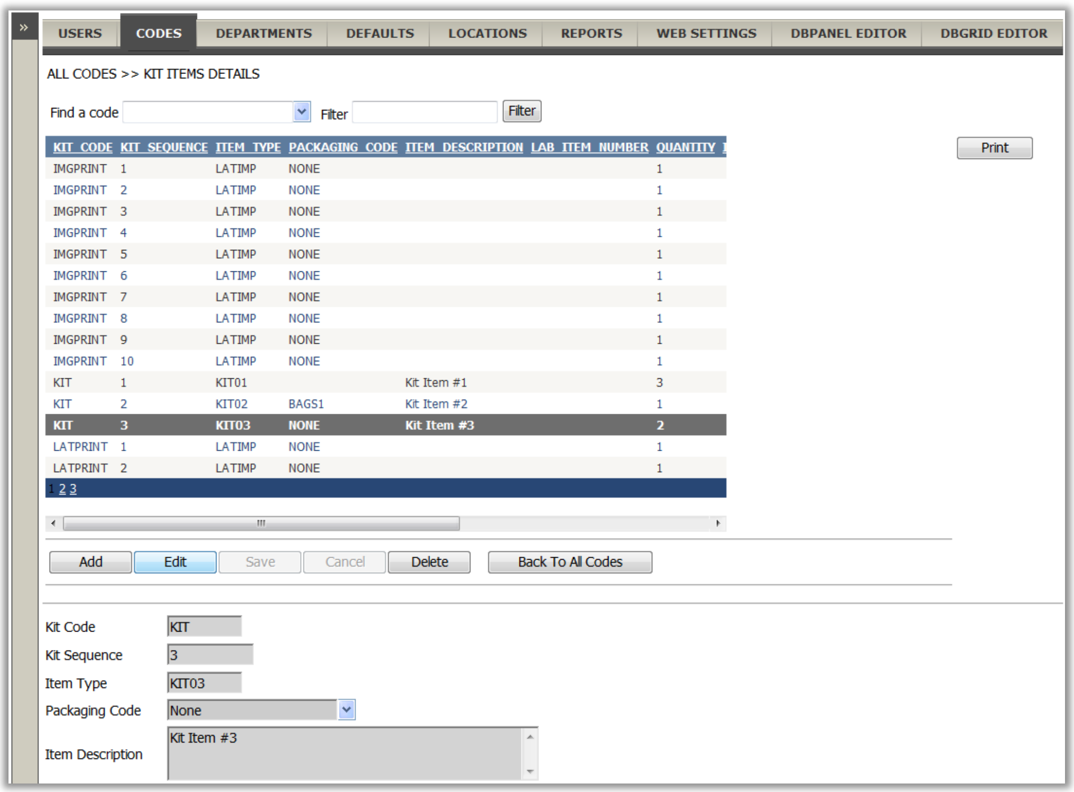
7. The **Packaging Code** determines the item's default packaging. Enter the corresponding code from the from the PACKTYPE table in this field to specify the packaging type for the item.

8. You can enter default description for the item in the **Description** field.

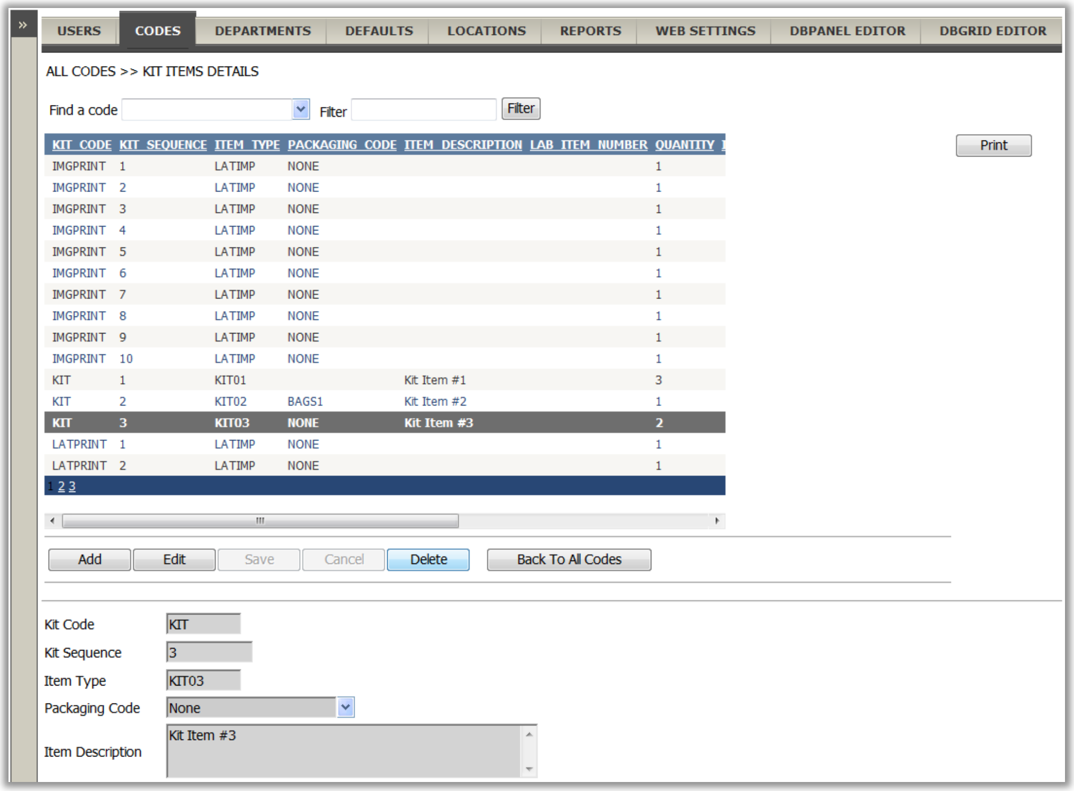
9. You can define a default quantity in the **Quantity** field. If this field is left blank the quantity will default to "1".

10. Click **Save**.

Once you've added a record, you can make changes to it at any time. To modify an item, select the record in the Kit Items table and click **Edit**. Once you are done making changes, click **Save**.

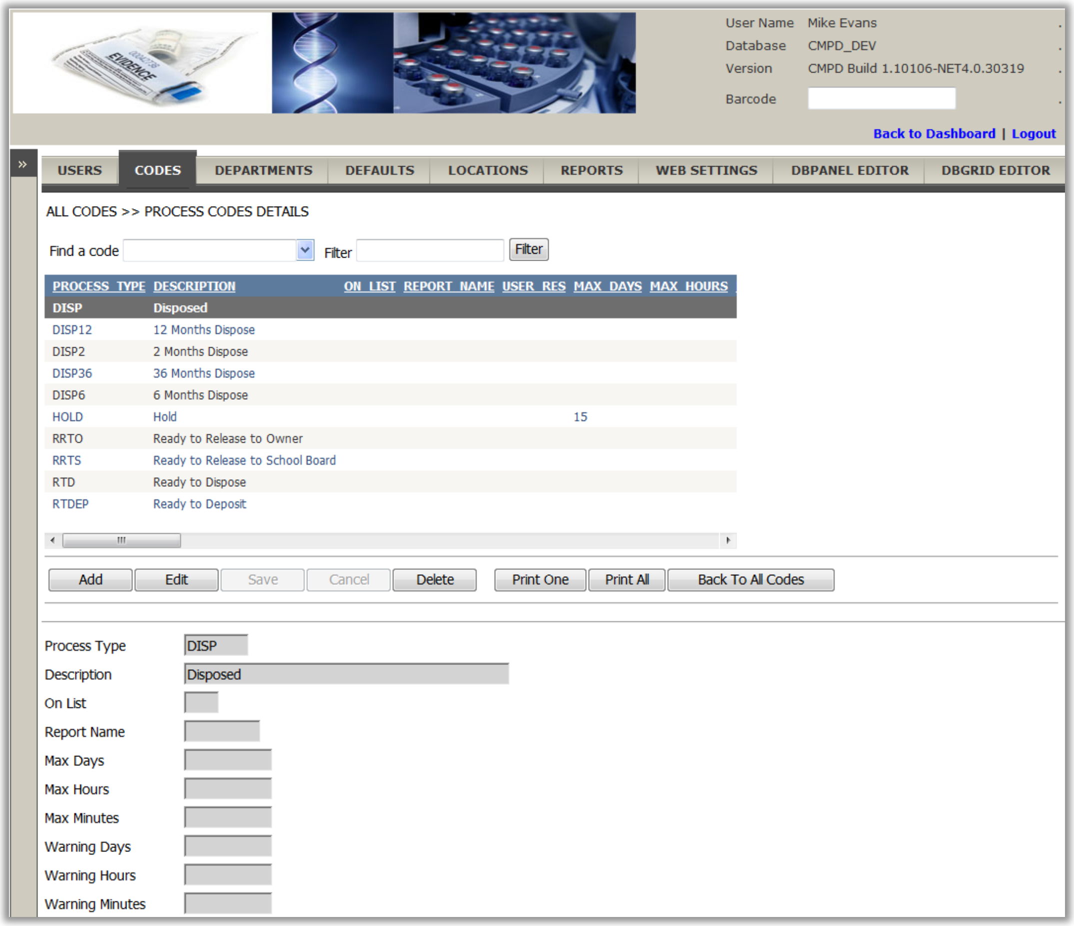


In order to remove items from a kit, you need to delete the record in the Kit Items table. Select the item you want to remove in the Kit Items table and click **Delete**. A confirmation message will display. Click **OK** to remove the item from the kit.



PROCESS CODES

Process codes are used to track an item's status. They can also be used to restrict custody transfers to certain locations based on the item's status. Process codes are defined in the Process Codes table. Selecting the Process Codes table on the Codes tab displays the Process Codes Details screen, shown below.



Initial Status

Items are assigned an initial/default status by the LIMS based on a trigger named GET_INITIAL_STATUS. Porter Lee will need to update this trigger in the database in order to implement any changes to the initial status. Please contact your Porter Lee support personnel regarding any changes needed to the initial status.

Status Changes

There are four ways to update an item's status in the LIMS:

1) Via a stored procedure that runs nightly in LIMS. The procedure is named BATCH_ITEM_UPDATE_PROCESS. The item status is updated based on specific triggers being met. Please consult your Porter Lee support personnel regarding any changes to the BATCH_ITEM_UPDATE_PROCESS.

2) Status Change Button, which is used to change the status of items directly from the Items tab. This process can also be used by the Investigator to change the status of one or more items in a case before they would normally get an Action Item at either the 6 month or 12 month review cycle (as appropriate for the case circumstances). A stored procedure determines if a second review is required.

3) Status Change via an Action Item (AI) process, also referred to as the Retention Review Process. This process is set up to reflect the review logic of the customer's organization. After "X" number of days, items with a specific status are assigned to the Investigator and Alternative Investigator for review. A second review may be required

based on certain factors. Porter Lee will set up the Retention Review Process prior to implementation. Please consult your Porter Lee support personnel about making changes to the Retention Review process.

4) Transferred to final disposition location. When an item is transferred to one of the DISP Custody Of locations, the status is automatically updated in LIMS to "Disposed."

Custody Locations

Process codes can be used to restrict custody transfers based on an item's status. Custody locations are defined by two codes, “Custody Of” and “Location.” Custody Of codes define general categories like "Evidence Storage" under which specific Locations are organized.

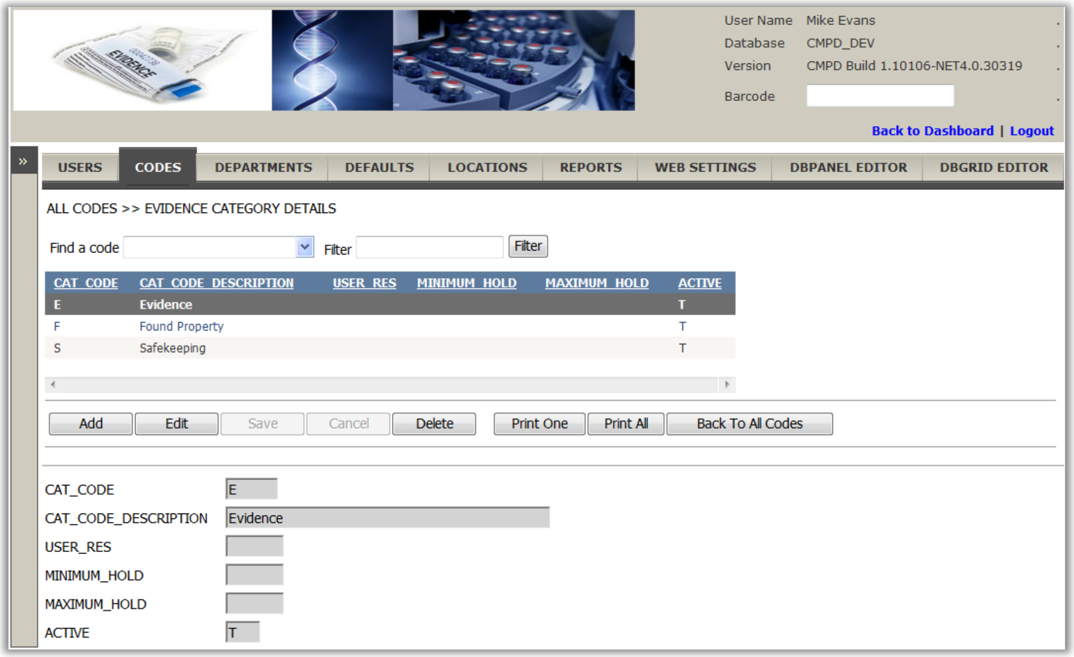
Custody Of codes are stored in the CUSTCODE table, which can be accessed from the Codes tab in Configuration. Entering a Process code in the "Invalid Process" field will prevent items with that status from being transferred to all the locations grouped under the selected Custody code.

You can set rules for the individual locations on the Locations tab. There are two location fields that apply to status changes and the Retention Review process:

- Process—automatically changes status when item is transferred to location, enter Process code to determine new status
- Valid Prior Process—items required to have specific status in order to be transferred to location

EVIDENCE CATEGORY

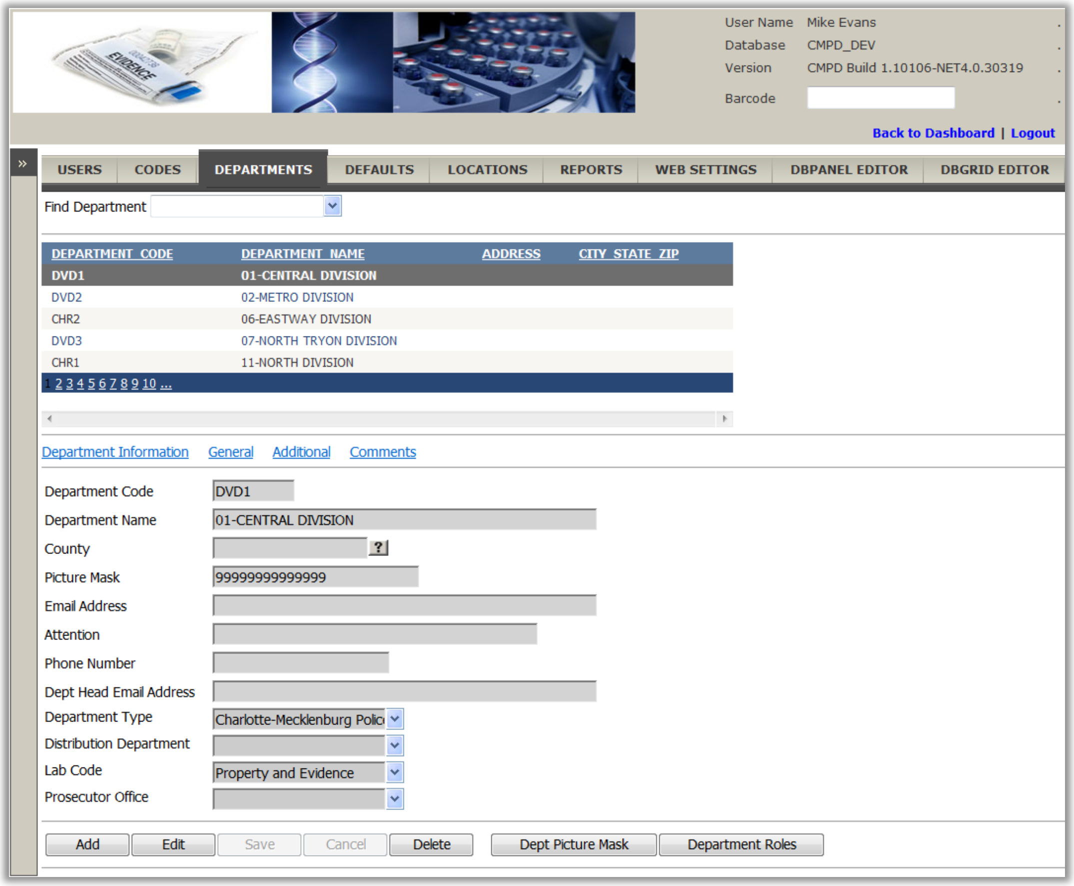
Evidence Category codes are used to group Item Type codes into categories. Evidence Category codes can be linked to Item Type codes using the Master Field Filter field in the Item Type table. The Item Type field on the Items tab will be filtered based on the selected Category. The Evidence Category also plays role in calculating the item's initial status and when the item is scheduled for retention review.



DEPARTMENTS TAB

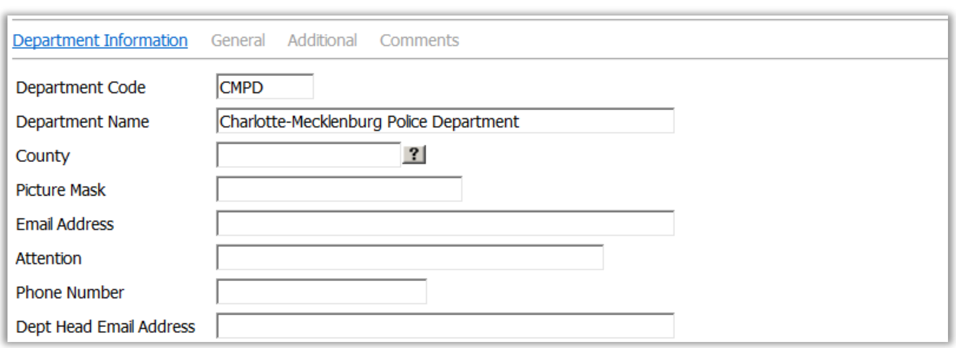
The **Departments** tab is used to set up a profile for each police department or agency that submits evidence to the laboratory. The steps for adding a new department are shown below.

Figure 19: Departments tab

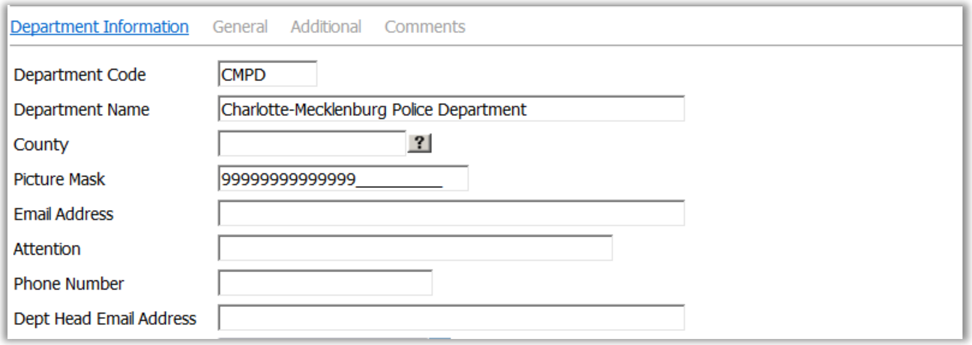


ADDING A DEPARTMENT

1. Click the **Add** button on the Departments tab.
2. Enter the **Department Code** and the **Department Name**.

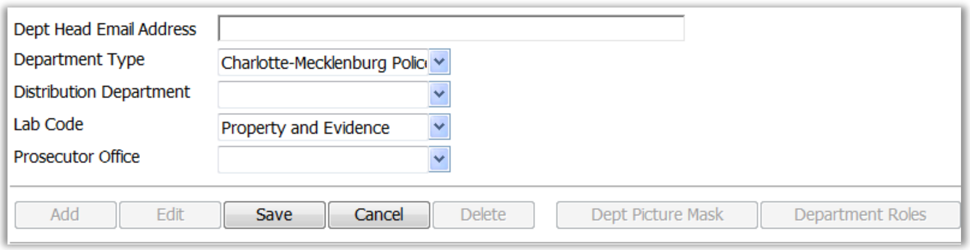


3. Enter the **Picture Mask.** The picture mask determines the format of the complaint number or agency case number for cases submitted by this department.



4. Select the **Department Type.**

5. Select the **Lab Code** and click **Save.**



DEFAULTS TAB

The Defaults tab is used to configure basic information for the laboratory. If yours is a multi-laboratory system, you can configure the defaults for each of the laboratories from this tab. The fields on the Defaults tab are described in Table 3, below.

Figure 20: Defaults tab

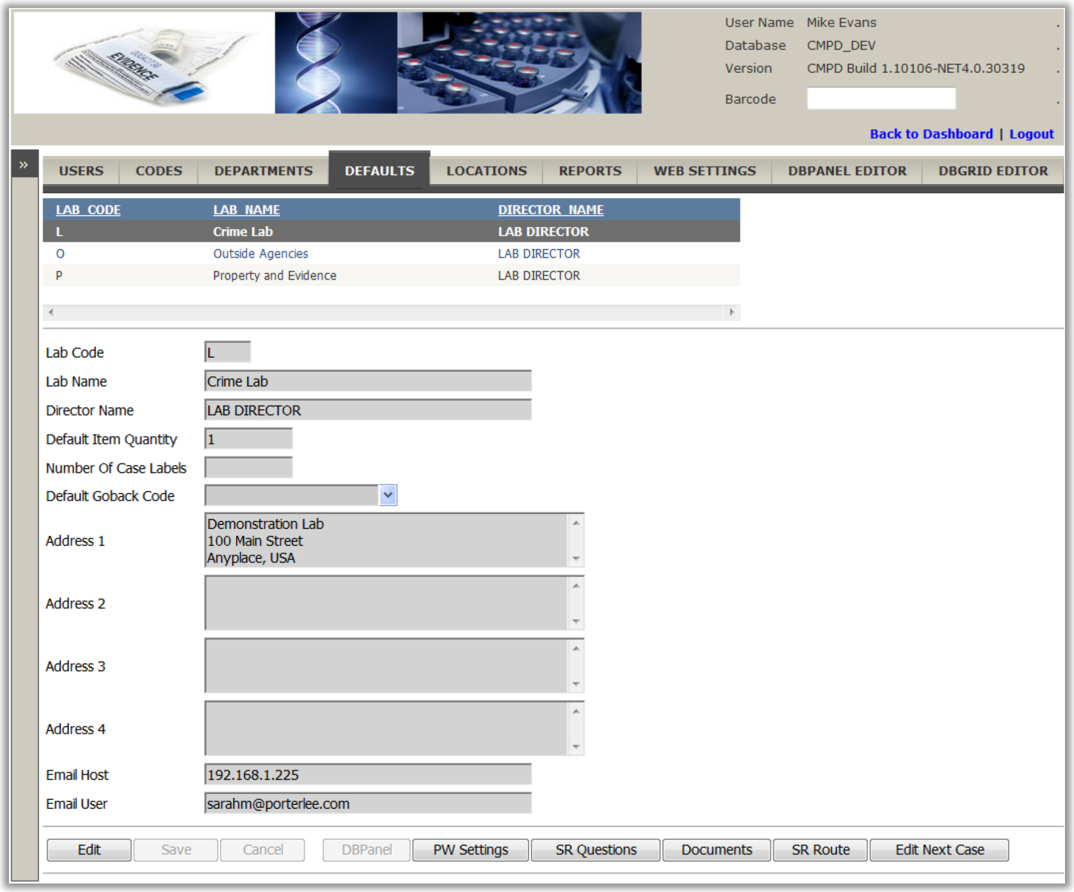


Table 3: Default Settings

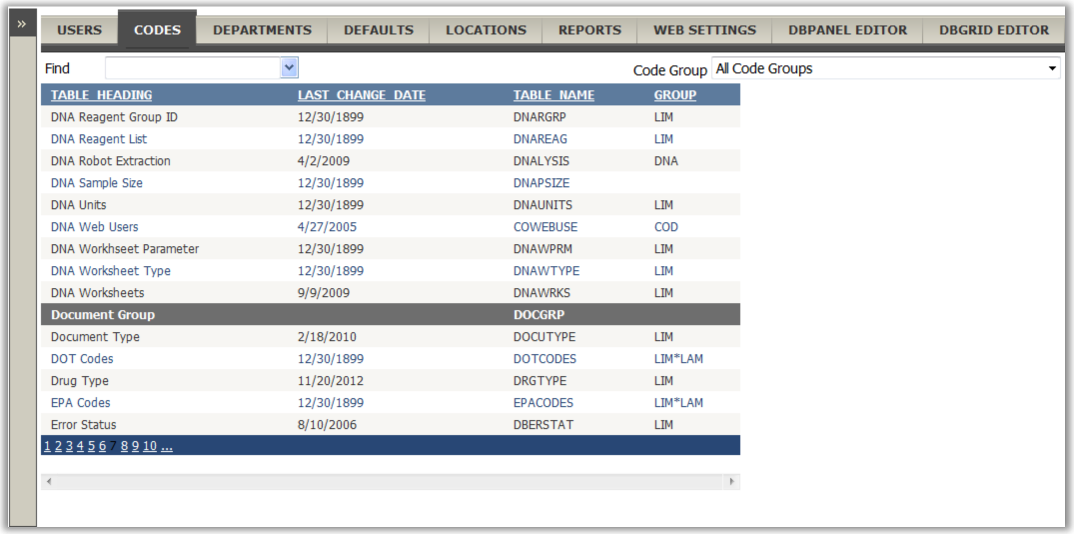
Screen Element	Description
Lab Code	This code uniquely identifies each laboratory. The code for each lab is already defined and cannot be changed.
Lab Name	This is the name of the laboratory, as it will appear on the lab reports. This default is already set for each lab and cannot be changed.
Director Name	This is the lab director's name as it will appear on the lab reports
Default Item Quantity	This defines the default quantity that's entered when you add a new item record.
Number of Case Labels	This specifies the number of case file labels that print for when a case is received via PDF417 barcode
Default Goback Code	Default custody code used for evidence returns
Address	Mailing address and other pertinent addresses for the laboratory
E-Mail Host	Host name for the E-mail server. Do not edit this field unless directed to do so by a Porter Lee Corporation employee.
E-Mail User	Default sign on for the E-mail server. Do not edit this field unless directed to do so by a Porter Lee Corporation employee.

DOCUMENTS

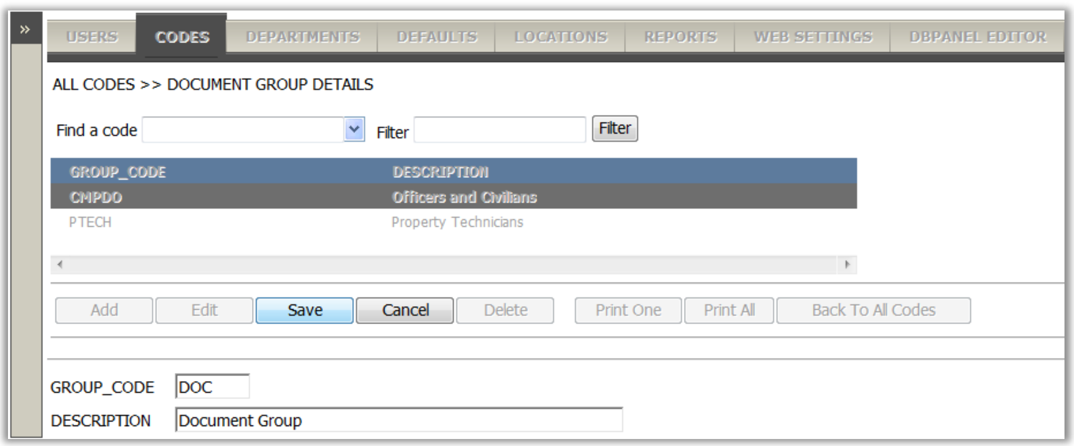
The Documents button is used to upload the documents for your agency into PLIMS. Users can view the documents by clicking the **Documents** option in the Dashboard menu. The documents that display for the user will depend upon their assigned document group.

ADDING DOCUMENT GROUPS

1. Select the **Documents Group** table on the Codes tab in Configuration.

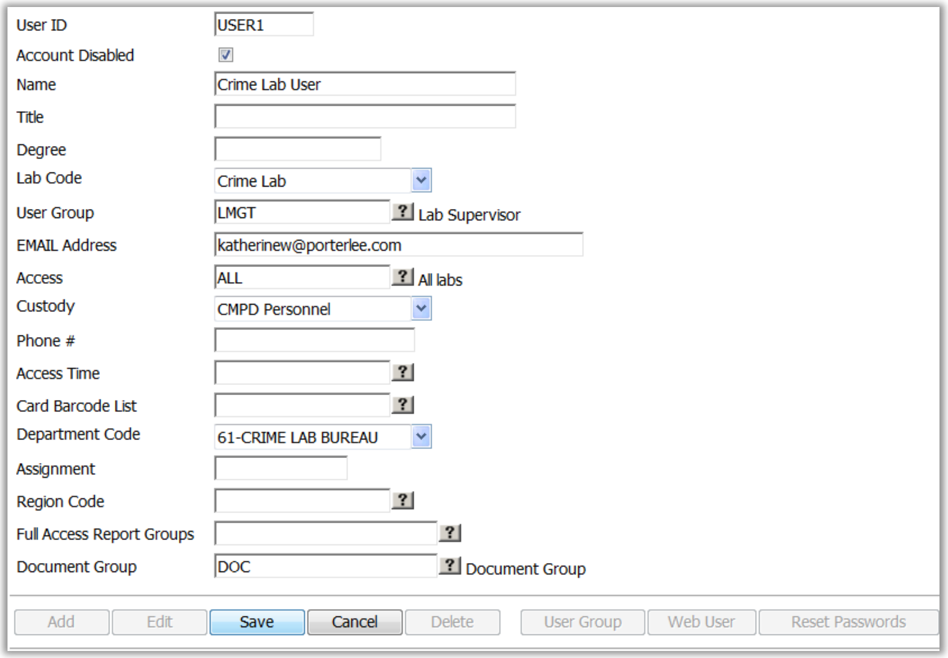


2. Click the **Add** button on the Documents Group Details screen.
3. Enter the **Group Code** and **Description**. Then click **Save.**



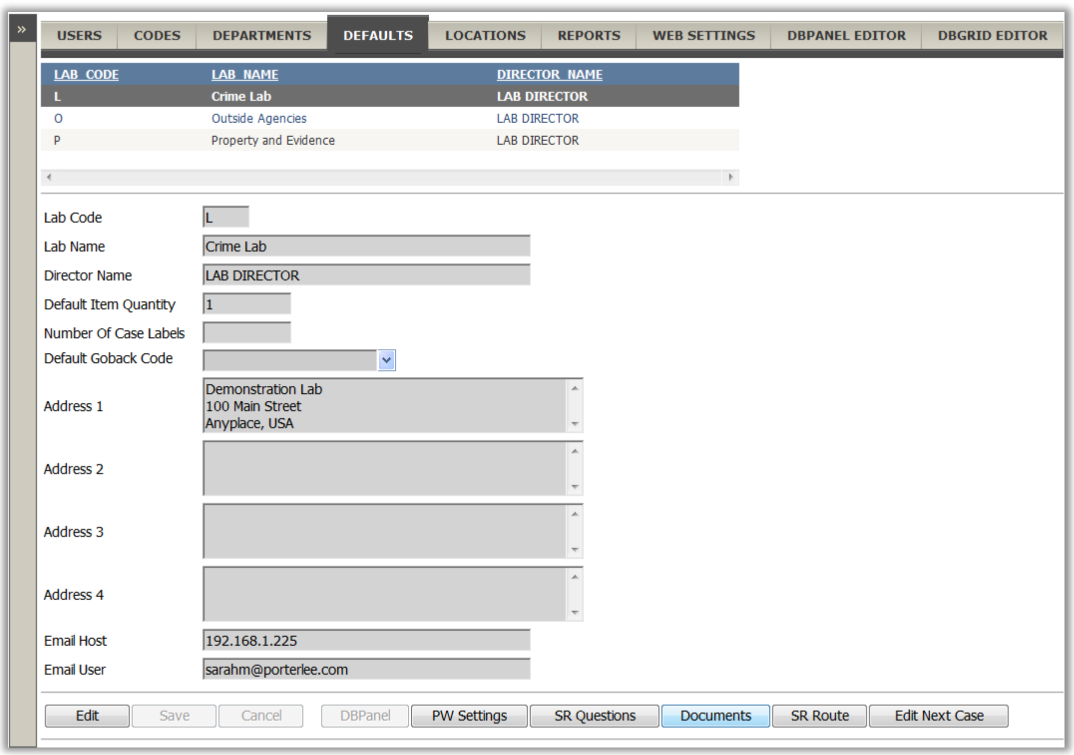
4. Go to the Users tab. Select the user you want to assign to the group and click **Edit**.

5. Select the Document Group(s) and click **Save**. The user will now have access to the documents added for the selected Document Group.

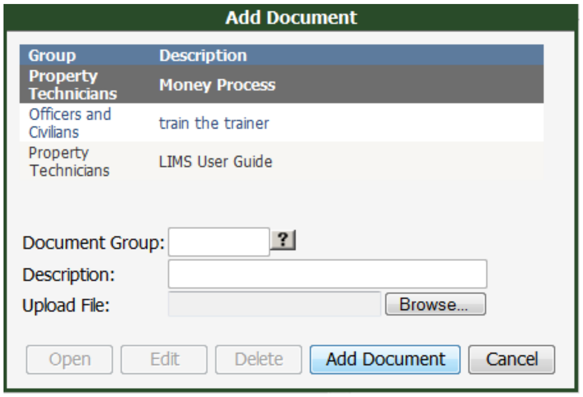


ADDING DOCUMENTS TO A DOCUMENT GROUP

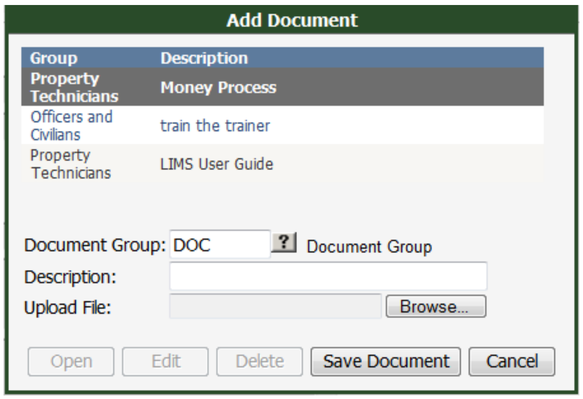
1. Click the **Documents** button on the Defaults tab in Configuration. The Add Document screen will display.



2. Click the **Add Document** button on the Add Document screen.

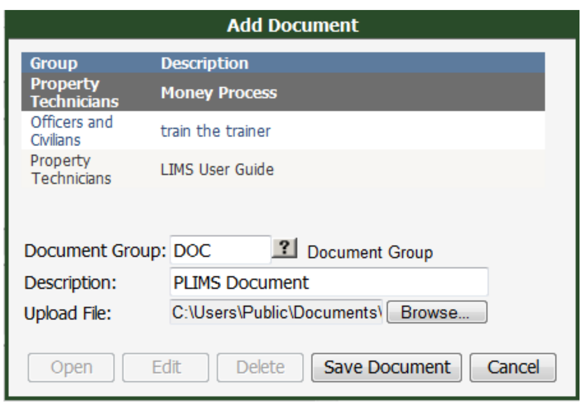


3. Select the **Document Group**.



4. Enter a **Description** for the document. The description will display on the Documents screen.

5. Click the **Browse** button and select the document in the browser window.

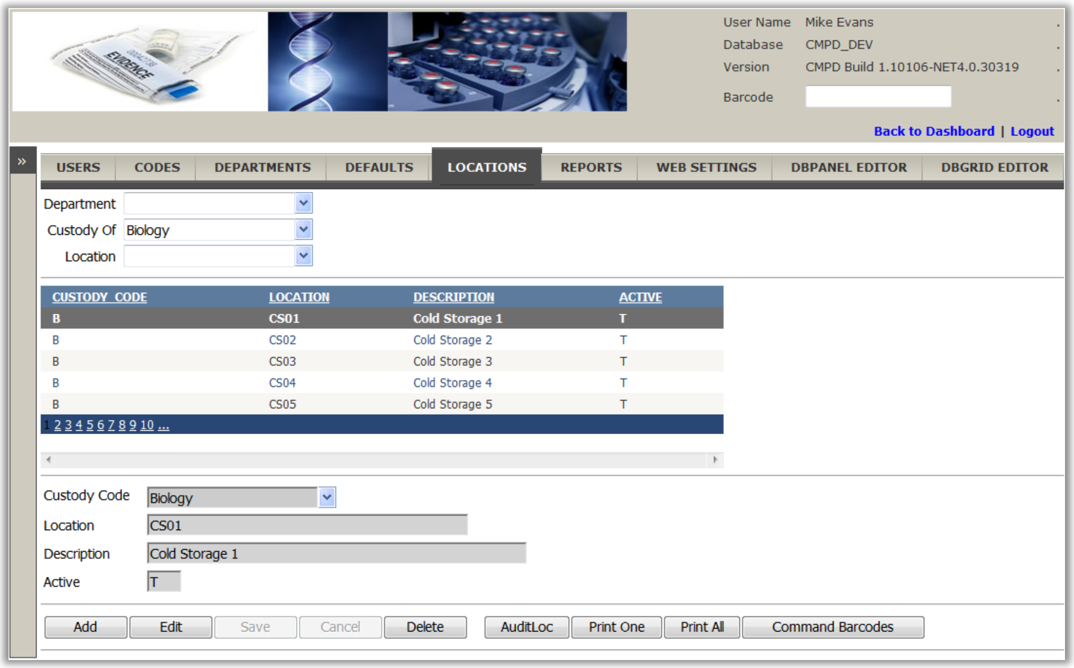


6. Click **Save Document**.

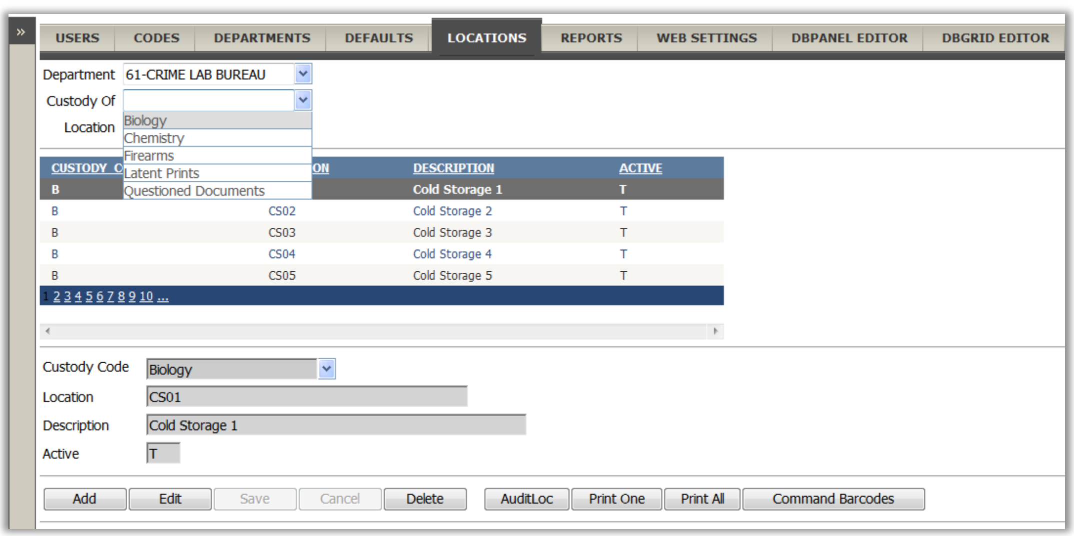
LOCATIONS

The Locations tab is used to add to and edit custody locations. Custody locations are grouped under "Custody Of" codes, which are added and maintained from the Codes tab. Custody Of codes define general categories like "Lab Staff" or "Evidence Storage" under which specific locations are organized.

Figure 21: Locations tab



You can filter the locations using the Department, Custody Of, and Location fields at the top of the screen.



LOCATION SETTINGS

The Location setting are described in Table 4, below.

Table 4: Location Settings

Setting	Description
Custody Code	Custody Of code the location is grouped under
Location	Location code
Description	Location description
Access Code	Entering an Access Code in this field restricts custody transfers to users with that Access Code. Multiple codes can be entered in a comma-separated list. Users without the specified Access Code will be prevented from transferring items to or from that location.
Active	Evidence can only be transferred to active locations. If this flag is set to "F" users will not be able to transfer evidence to the location.
Process	Item Status changes to specified Process when evidence is transferred to location
Comment Heading	Defines Comments field prompt on transfer screen
Tracking Number Required	If set to "T" a Tracking Number is required in order to transfer items to location
Tracking Number Title	Defines Tracking Number field prompt on transfer screen
Issued Location	Used to manage consumable items in Cheminv.
Received Location	Used to manage consumable items in Cheminv.
Transfer Restriction Type	Restricts transfers based on corresponding Restrict Type code. RESTTYPE table "Authorization Required," "Invalid Item Types," and "Valid Item Types"
Signature Required	Get Signature checked
Comment Required	If set to "T" Comments are required in order to transfer items to location
Display Release To	Displays Released to Department and Released to User fields on transfer screen
Require Release To Pin	Pin required for user selected in Released to User field
Valid Prior Process	Items required to have specified status in order to be transferred to location

PRINTING LOCATION BARCODES

You can print labels to affix to each of the locations. These labels can be useful when performing custody transfers or taking inventory with a barcode reader. In order to print a barcode for a location, select the location in the grid columns in the top half of the screen. Then click the **Print One** button on the bottom of the Locations tab. A barcode label will print for the selected custody location. You can also use the **Print All** button to print barcode labels for all of the locations for the selected Custody Of.

Figure 22: Print One button on Locations tab

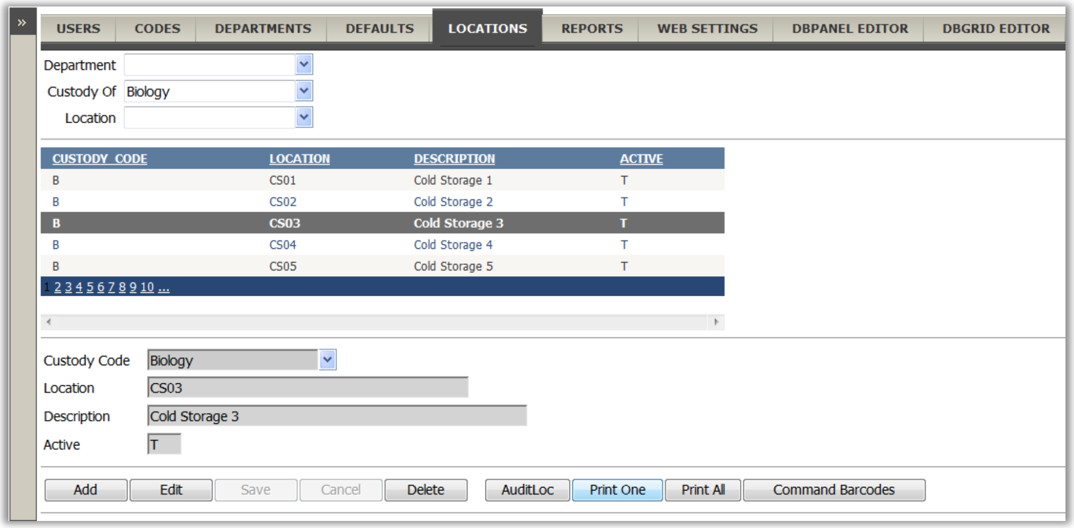
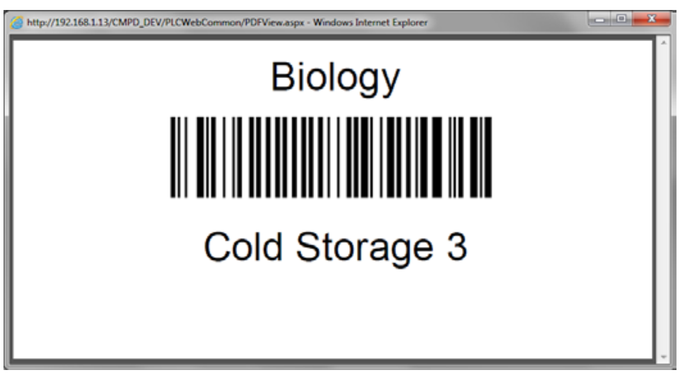


Figure 23: Location barcode label



PRINTING COMMAND BARCODES

It is possible to print barcode labels that automate various lab tasks. Using these labels can save a lot of time. To print these labels, click the **Command Labels** button on the bottom of the Locations tab.

Figure 24: Command Barcodes button on Locations tab

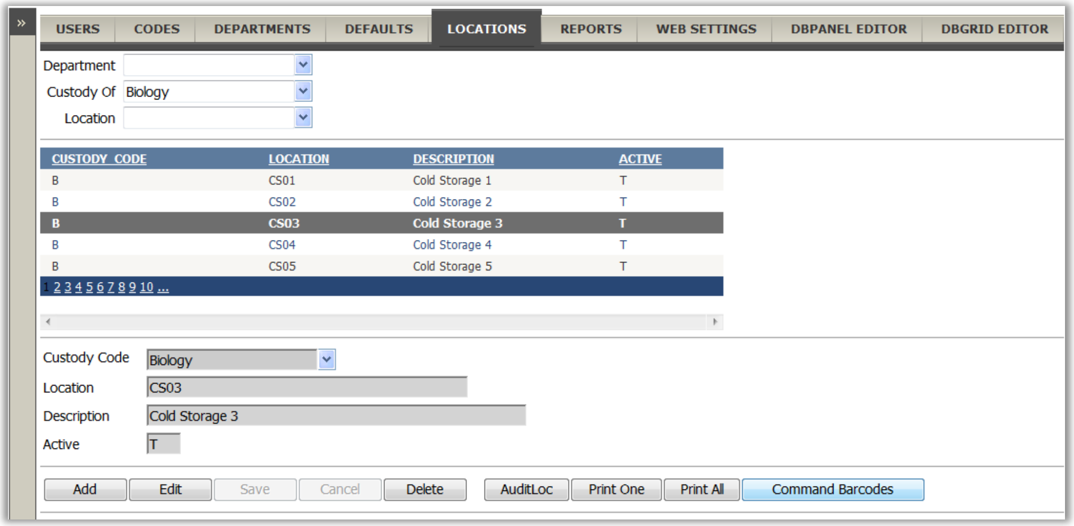
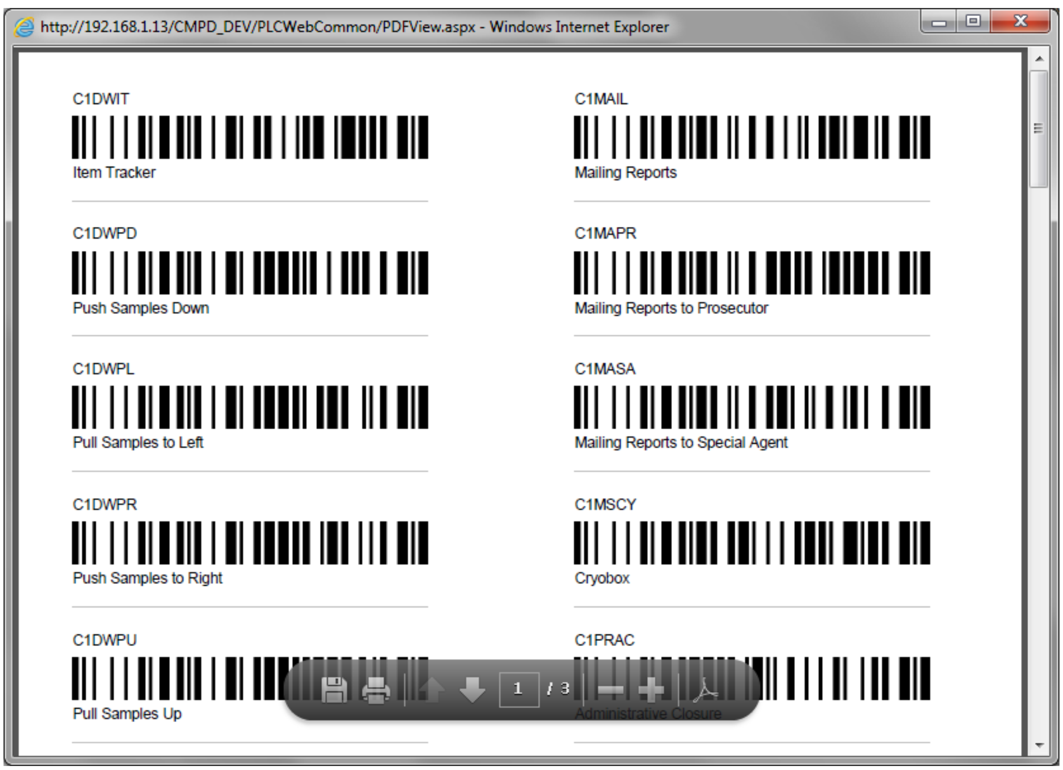


Figure 25: Command barcodes

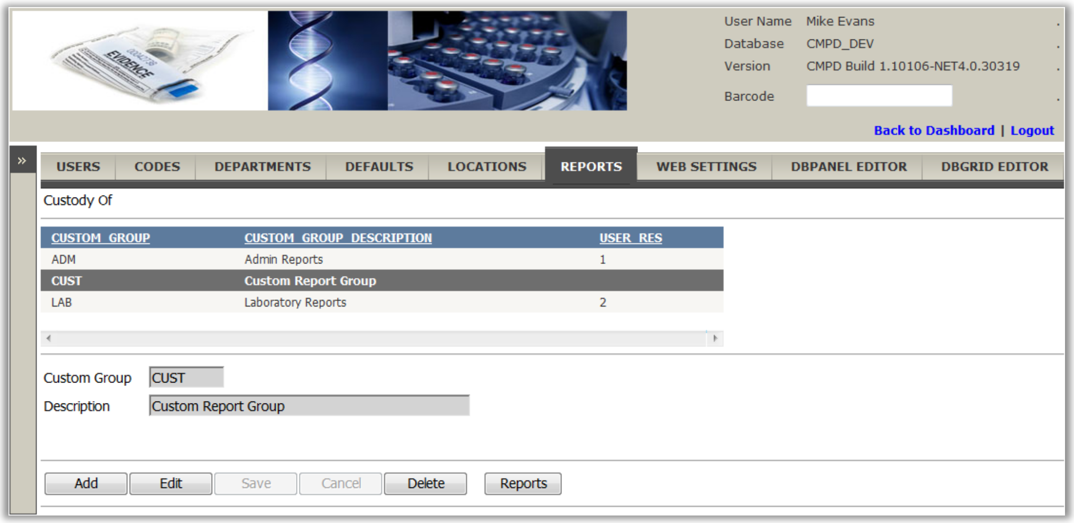


REPORTS

The Reports tab is used to add custom reports to the PLIMS. Users can access reports for from the Dashboard menu, by selecting the **Custom Reports** option below Reports.

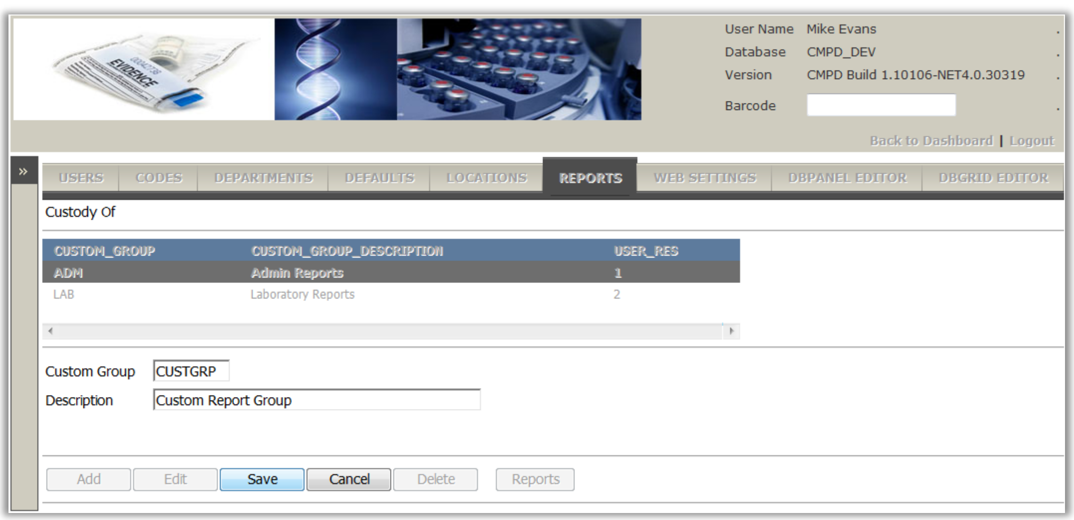
Custom Report Groups determine which reports users can access. Reports are assigned to one or more groups and users assigned to those groups will be able to generate the reports. The following two sections explain how to add a Custom Report Group and assign users to the group. The last section of this chapter explains how to add a custom report in PLIMS.

Figure 26: Reports tab



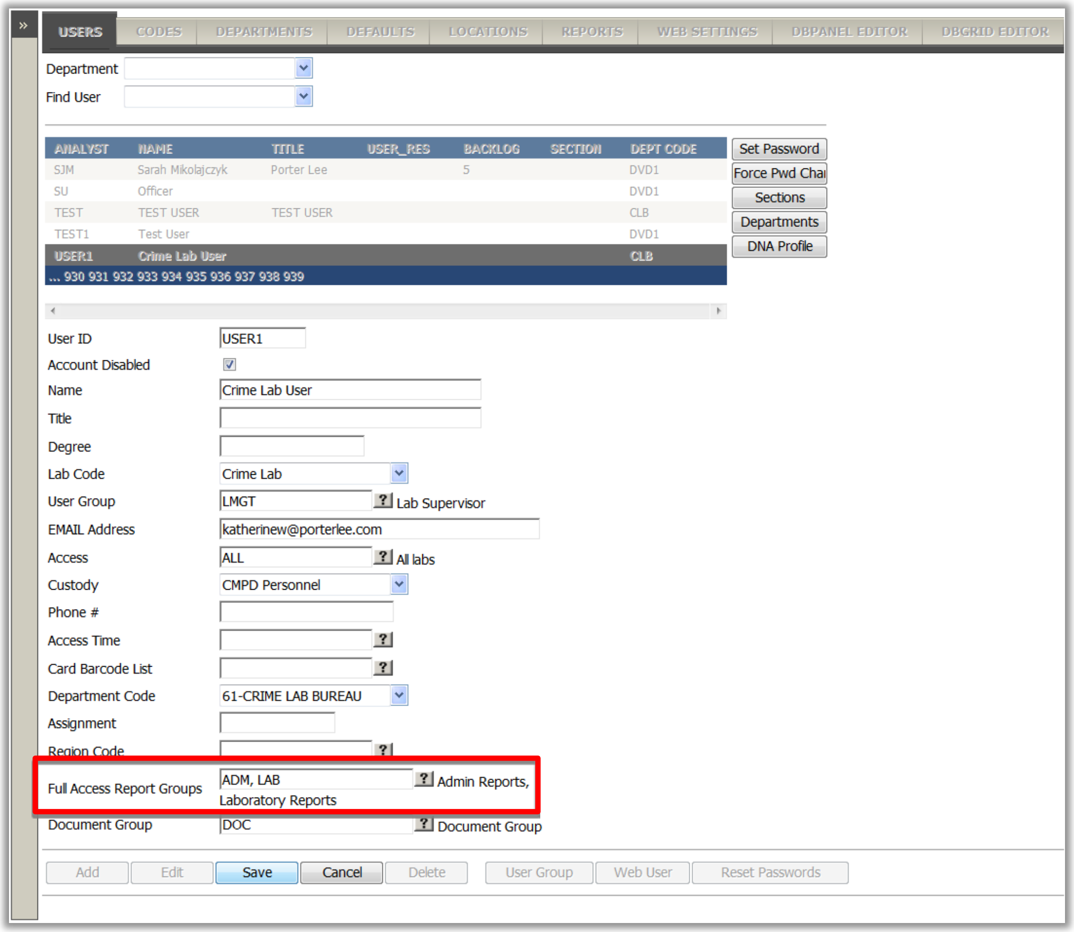
ADDING A CUSTOM REPORT GROUP

1. Click the **Add** button on the Reports tab.
2. Enter the group code in the **Custom Group** field.
3. Enter the **Custom Group Description** and click **Save**.



ASSIGNING USERS TO CUSTOM REPORT GROUPS

You can assign users to a custom report group by selecting the user on the Users tab and then clicking Edit. Select the user's report group(s) in the **Fill Access Report Groups** field and then click **Save.**



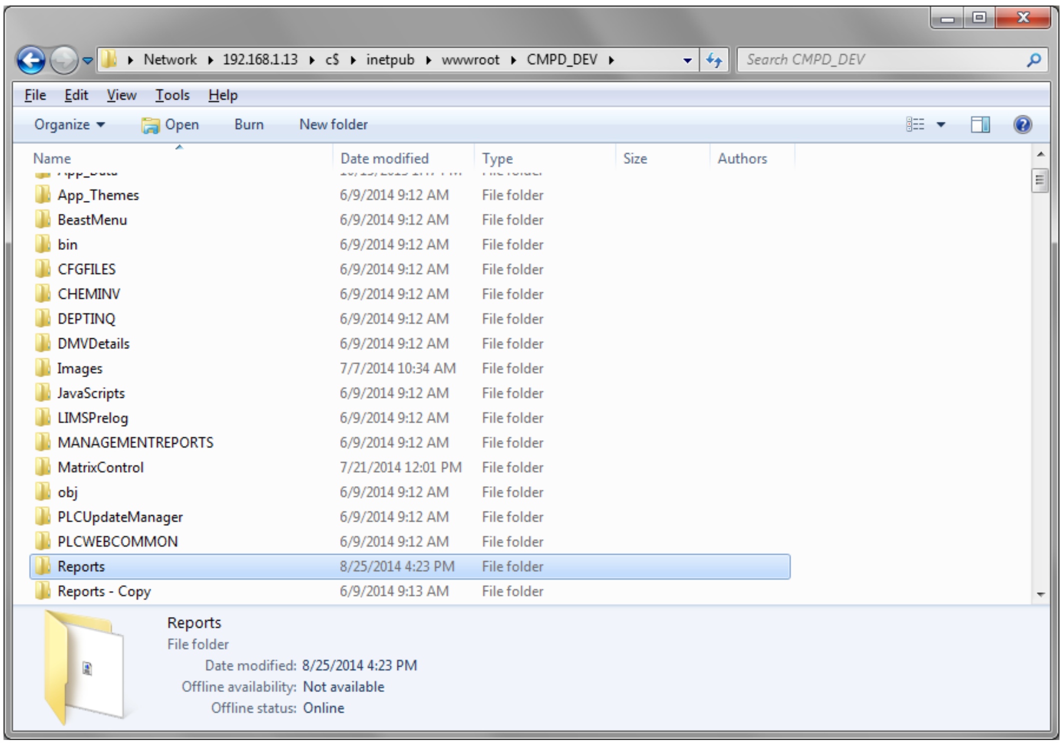
ADDING CUSTOM REPORTS

There are three main steps to adding a custom report:

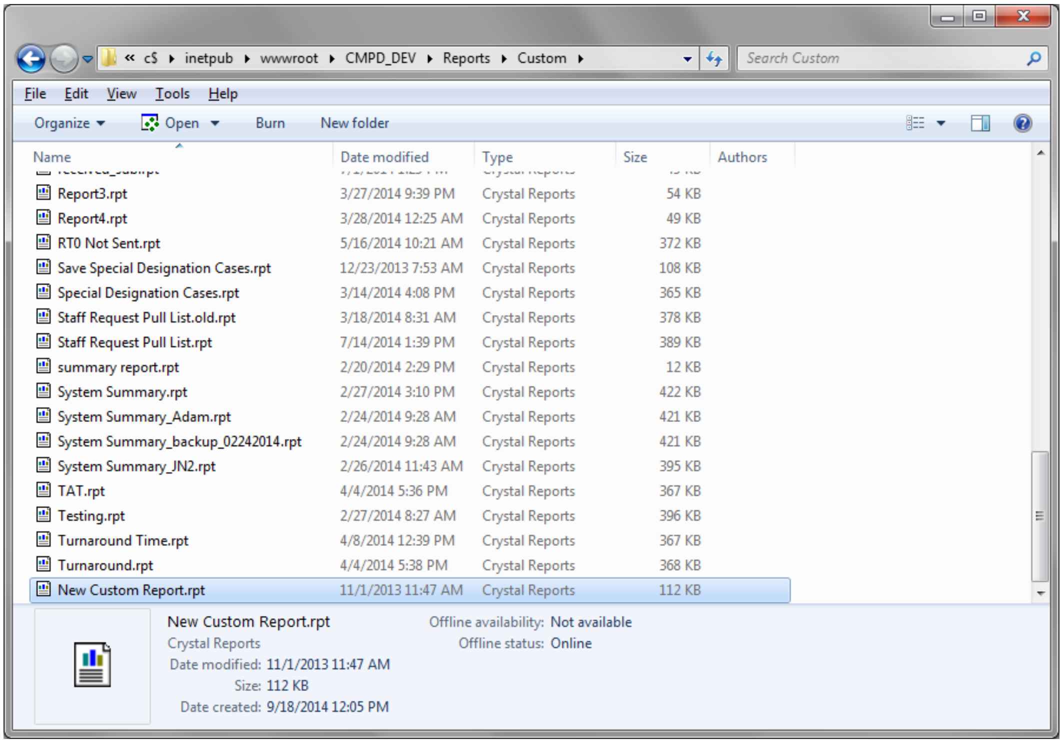
1. Save report to virtual directory
2. Add report on Reports tab
3. Define report parameters in adhoc.ini

SAVING REPORTS TO THE VIRTUAL DIRECTORY

Crystal Reports are saved to the virtual directory in the Reports folder. Stock reports (Case Jacket, Chain of Custody, etc.) are saved in either the SQL or Oracle folder within the Reports folder. Custom reports are stored in the Custom folder along with adhoc.ini, which is used to define parameters for custom reports.



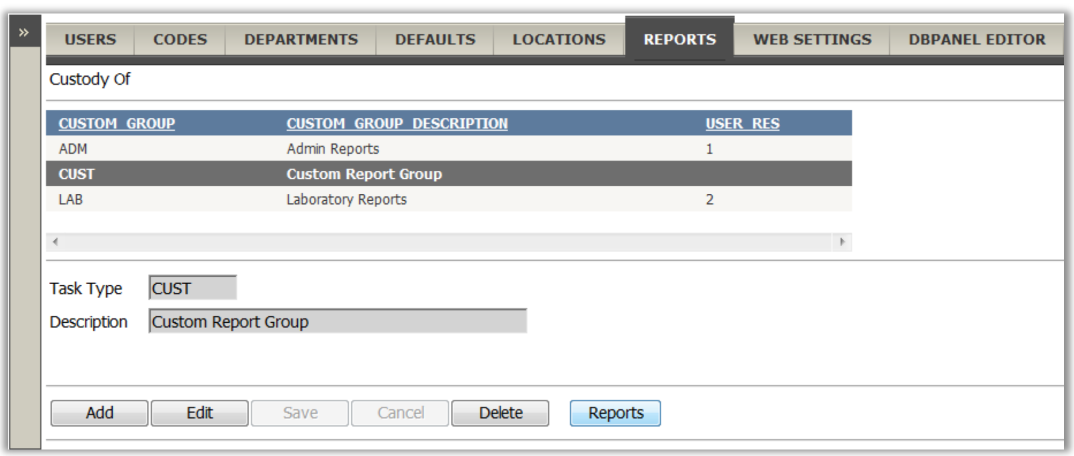
Navigate to the Custom folder and save the new custom report to the virtual directory.



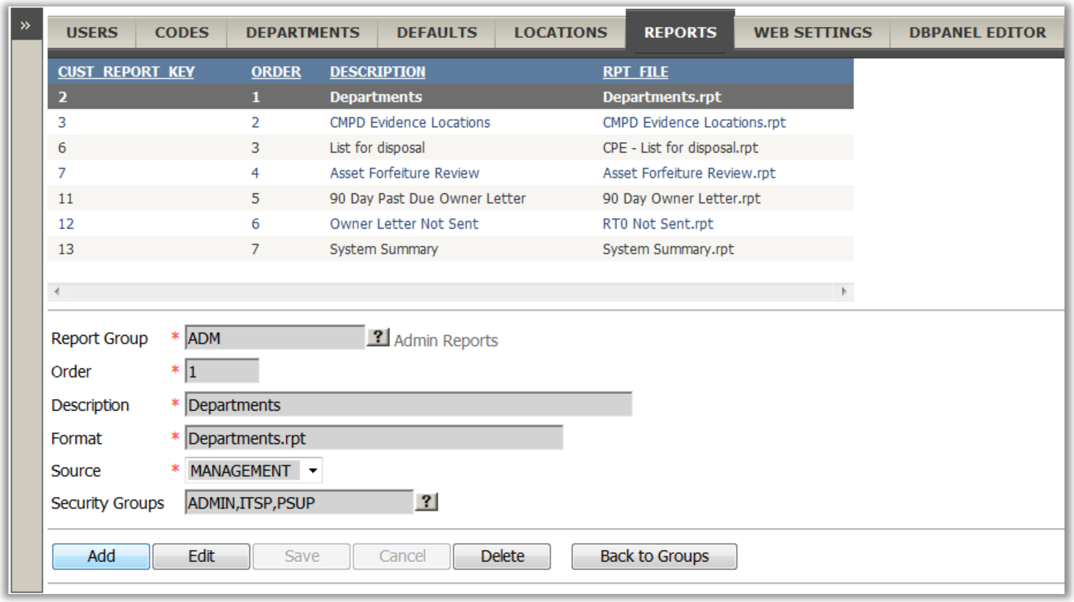
ADDING CUSTOM REPORTS IN PLIMS

Once the custom report is saved to the virtual directory, you can add it to a report group in the PLIMS.

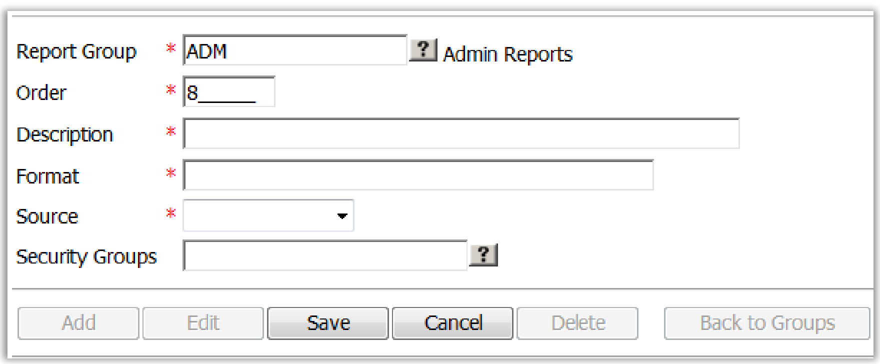
1. Select the Custom Group on the Reports tab and click the **Reports** button.



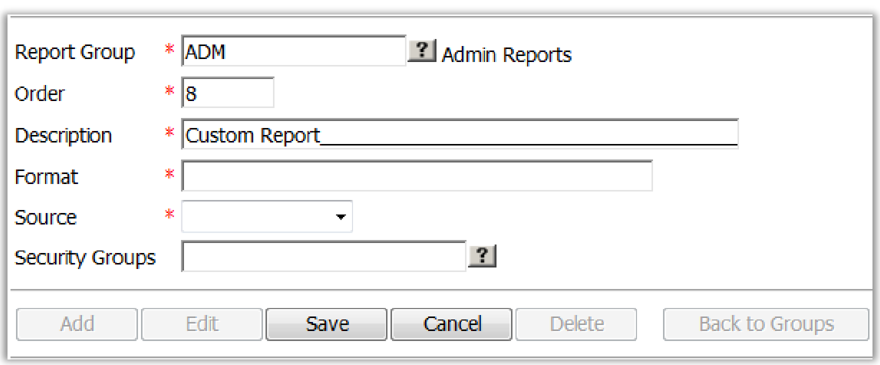
2. Click the **Add** button.



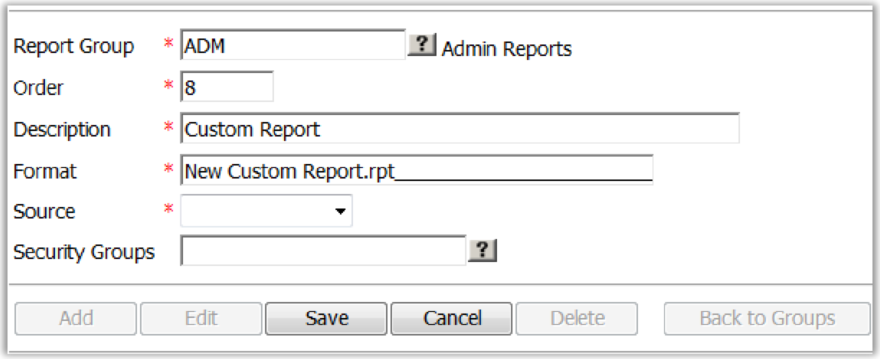
3. Enter a number in the **Order** field. The Order determines that reports added to the Custom Group display on Custom Reports screen.



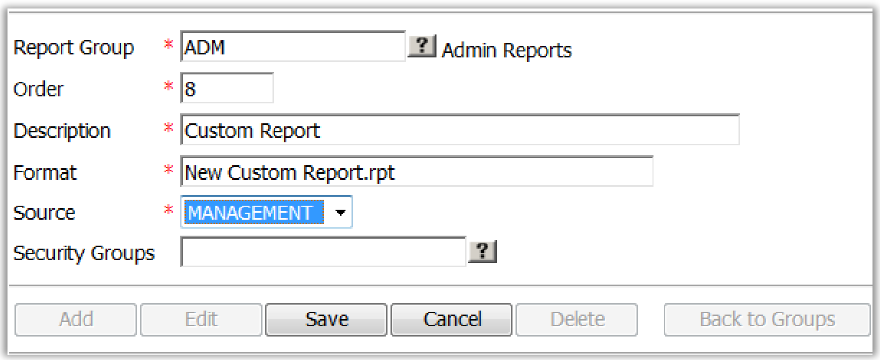
4. Enter a **Description** of the report. The description you enter here will display on the Custom Reports screen.



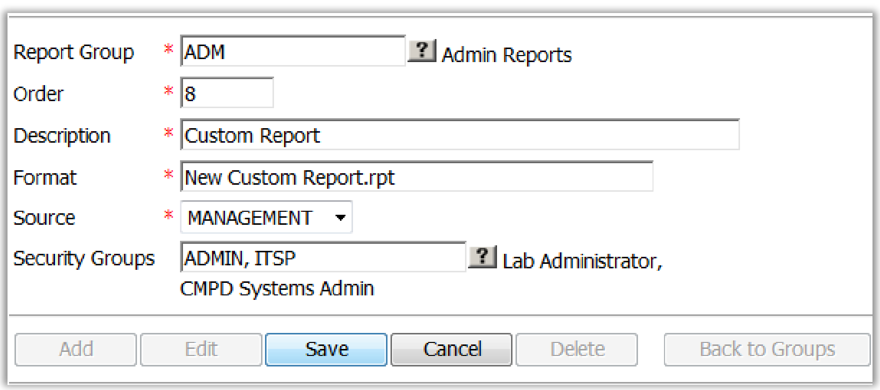
5. Enter the name of the Crystal Report saved to the virtual directory in the **Format** field.



6. Select the **Source**

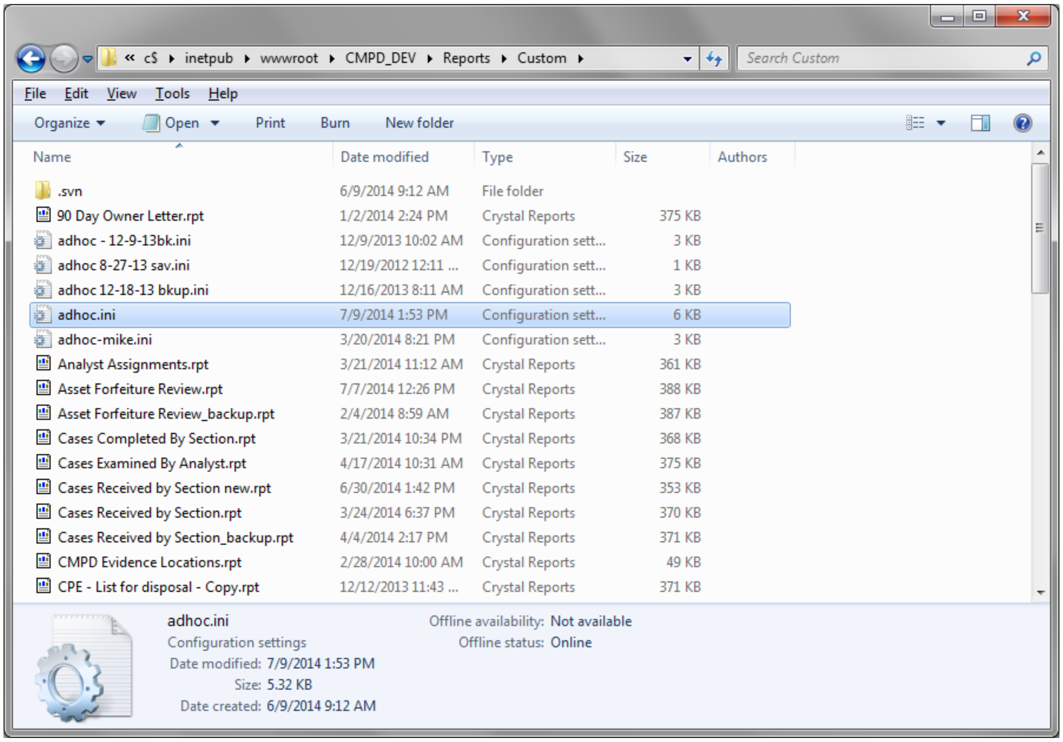


7. Select any **Security Groups** that

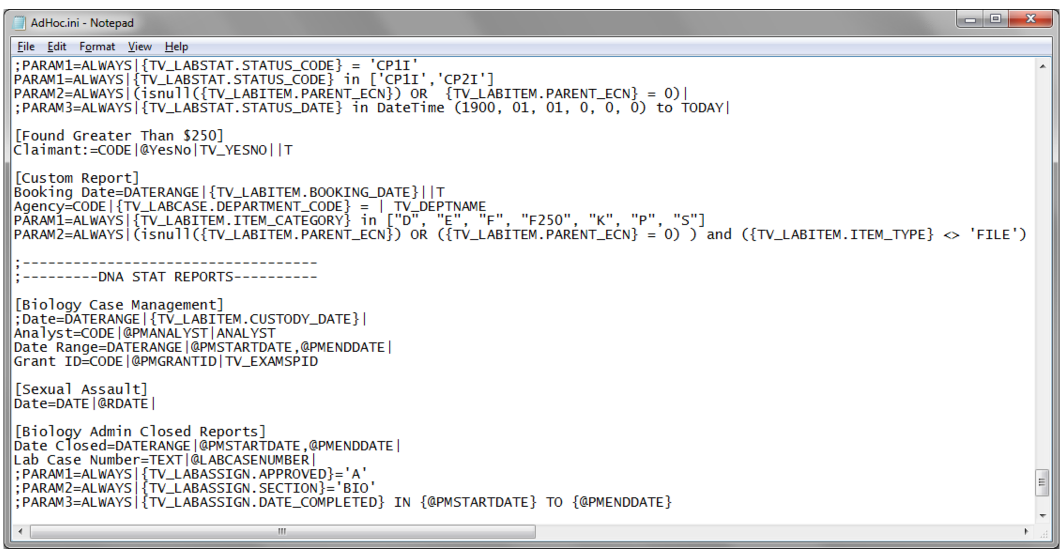


ADHOC.INI

You can define the report parameters in the adhoc.ini. To define the report parameters, navigate to the Custom folder under Reports in the virtual directory, and open the adhoc.ini file.



Enter the name of the report in brackets (this should be the same as the Description you entered on the Reports tab). Enter each parameter in a separate line beneath the report name and save.




```
;PARAM1=ALWAYS|{TV_LABSTAT.STATUS_CODE} = 'CP1I'
PARAM1=ALWAYS|{TV_LABSTAT.STATUS_CODE} in ['CP1I','CP2I']
PARAM2=ALWAYS|(isnull({TV_LABITEM.PARENT_ECN}) OR  {TV_LABITEM.PARENT_ECN} = 0)|
;PARAM3=ALWAYS|{TV_LABSTAT.STATUS_DATE} in DateTime (1900, 01, 01, 0, 0, 0) to TODAY|

[Found Greater Than $250]
Claimant:=CODE|@YesNo|TV_YESNO||T

[Custom Report]
Booking Date=DATERANGE|{TV_LABITEM.BOOKING_DATE}||T
Agency=CODE|{TV_LABCASE.DEPARTMENT_CODE} = | TV_DEPTNAME
PARAM1=ALWAYS|{TV_LABITEM.ITEM_CATEGORY} in ["D", "E", "F", "F250", "K", "P", "S"]
PARAM2=ALWAYS|(isnull({TV_LABITEM.PARENT_ECN}) OR ({TV_LABITEM.PARENT_ECN} = 0) ) and ({TV_LABITEM.ITEM_TYPE} <> 'FILE')

;----------------------------------
;---------DNA STAT REPORTS----------

[Biology Case Management]
;Date=DATERANGE|{TV_LABITEM.CUSTODY_DATE}|
Analyst=CODE|@PMANALYST|ANALYST
Date Range=DATERANGE|@PMSTARTDATE,@PMENDDATE|
Grant ID=CODE|@PMGRANTID|TV_EXAMSPID

[Sexual Assault]
Date=DATE|@RDATE|

[Biology Admin Closed Reports]
Date Closed=DATERANGE|@PMSTARTDATE,@PMENDDATE|
Lab Case Number=TEXT|@LABCASENUMBER|
;PARAM1=ALWAYS|{TV_LABASSIGN.APPROVED}='A'
;PARAM2=ALWAYS|{TV_LABASSIGN.SECTION}='BIO'
;PARAM3=ALWAYS|{TV_LABASSIGN.DATE_COMPLETED} IN {@PMSTARTDATE} TO {@PMENDDATE}
```

WEB SETTINGS

The Web Settings tab is used to define high-level system settings. The settings are described in Table 5, below.

Figure 27: Web Settings tab

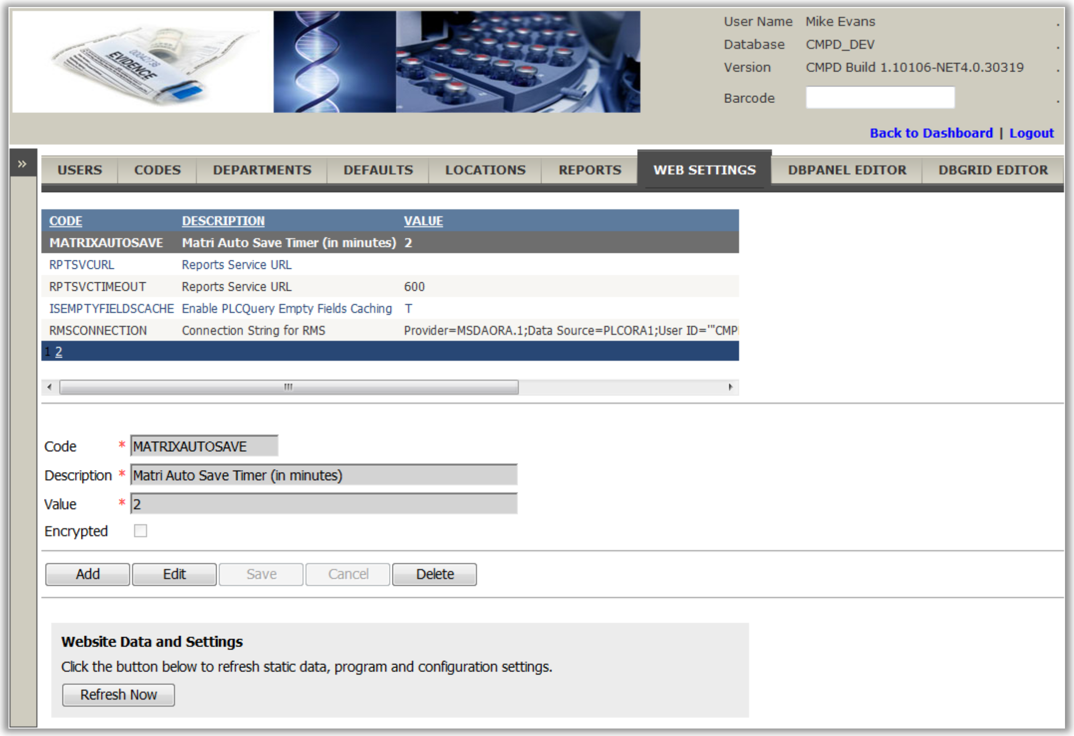


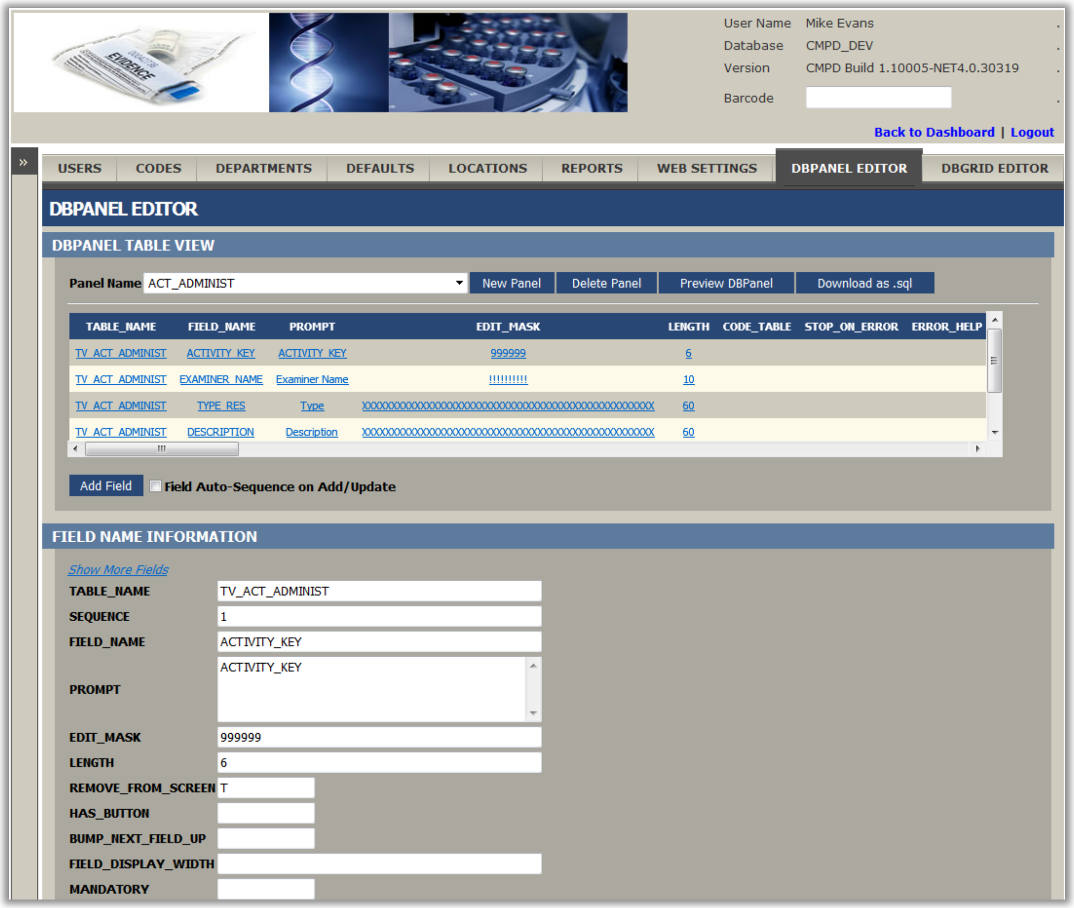
Table 5: Web Settings

Setting	Code	Description
Matrix Auto Save Timer (in minutes)	MATRIXAUTOSAVE	This provides the administrator with the ability to increase the frequency with which the matrix data saves to the database. This can be an extra safeguard in case of network connection dropout.
Reports Service URL	RPTSVCURL	A separate report server can be configured for processing crystal reports. The URL is defined here.
Reports Service URL	RPTSVCTIMEOUT	This timeout will control the report server so that an extremely large report can complete if necessary and not just fail.
Connection String for RMS	RMSCONNECTION	This is a customer specific RMS interface connection string for importing selected data on case create.
Notes Packet Service	NOTESVCURL	A separate server can be configured for processing the notes packet. The URL is defined here.
Enable DBPanel AutoSave	DBPANEL_ISAUTOSAVE	This provides the administrator with the ability to increase the frequency with which DBPanel data entries save to the database. This can be an extra safeguard in case of network connection dropout.
FLEXBOXQUERYDELAY	FLEXBOXQUERYDELAY	Increasing or decreasing this number can optimize the display and filtering on code lookups utilizing the flexbox control.
DBCACHE_EXP	DBCACHE_EXP	This tells the program how often it can refresh the cache on normally used items, such as lookup tables. The longer the cache timeout, the more efficient the program (speed), however, the screen could display bad or obsolete data.

DBPANEL

The DBPanel Editor allows Porter Lee support personnel to edit the fields on various screens throughout the PLIMS. Please contact PLC with any questions regarding field configuration in the PLIMS.

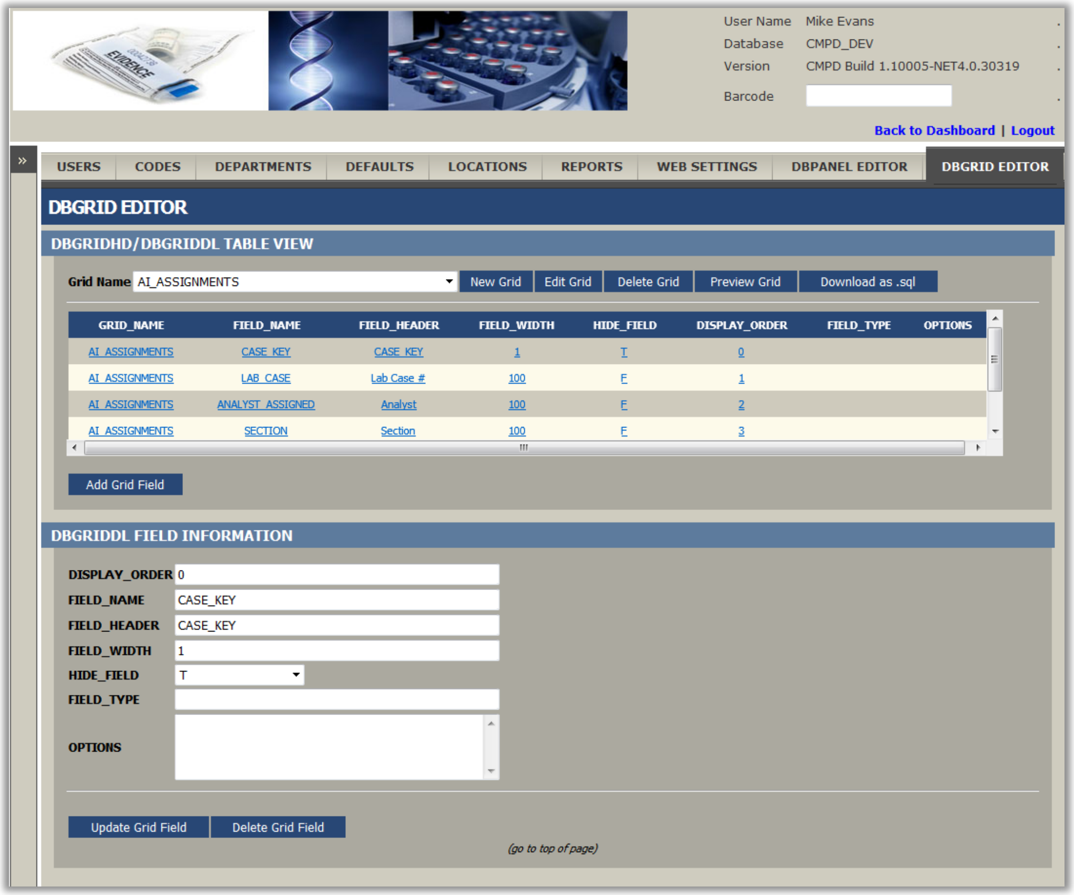
Figure 28: DBPanel Editor



DBGRID

The DBGrid Editor allows Porter Lee support personnel to edit the grid columns on various screens throughout the PLIMS. Please contact PLC with any questions regarding grid column configuration in the PLIMS.

Figure 29: DBGrid Editor



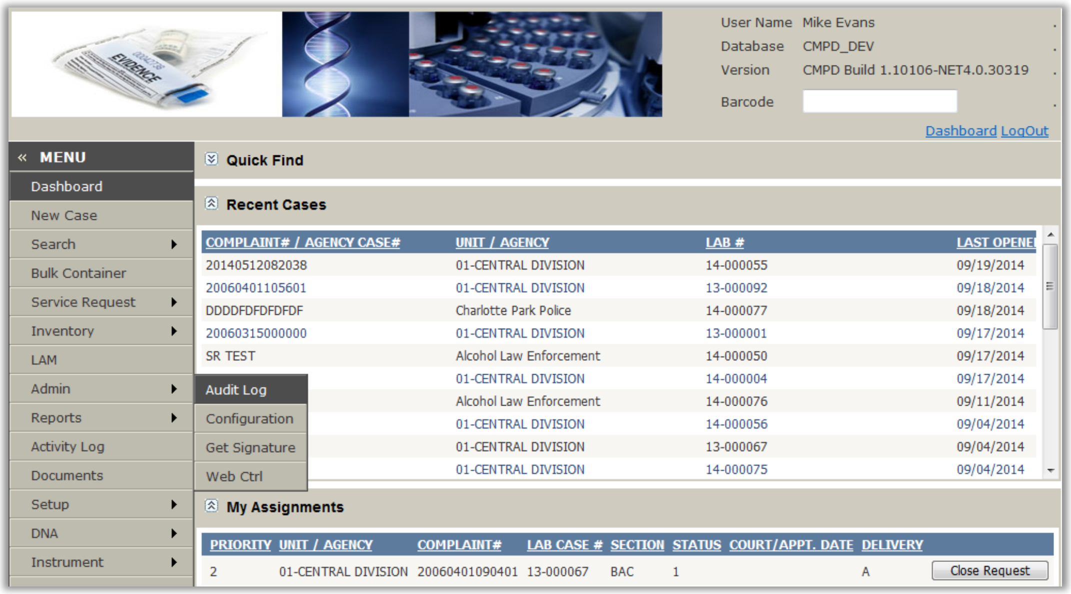
AUDIT LOG

The Audit Log is used to monitor system activity. It is an integral part of the PLIMS system security. This section explains how to search for records in the Audit Log.

Access to the Audit Log is typically limited to system administrators. It is accessed from the Dashboard menu, by selecting the **Audit Log** option under **Admin**. This will display the Audit Log screen.

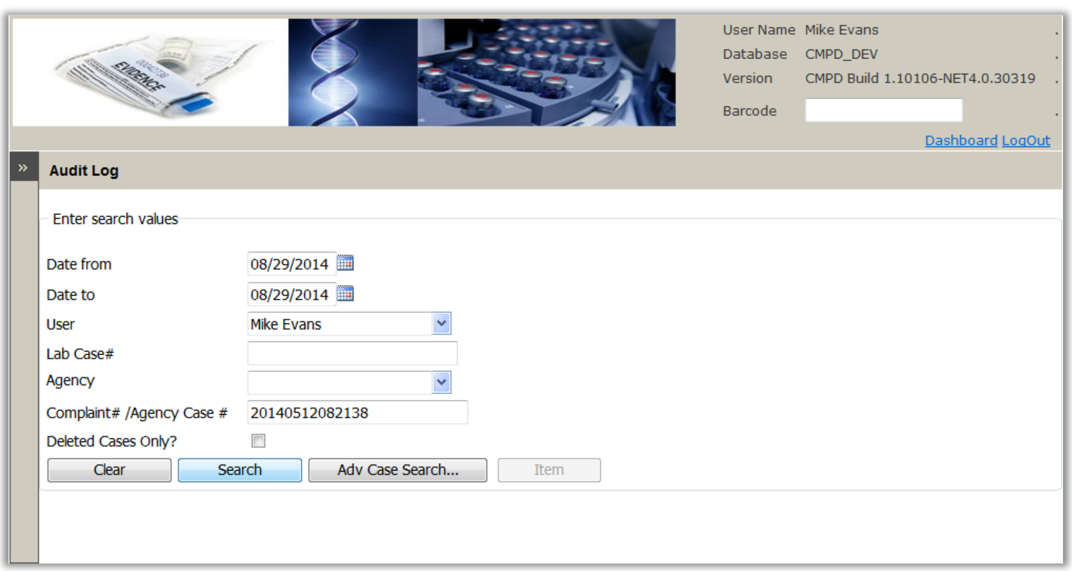
NOTE This option will not appear in the Dashboard menu unless you have the user group permission "Access the Audit Log Program." See page 11 for more information on user group permissions.

Figure 30: Select Audit Log in the Dashboard menu



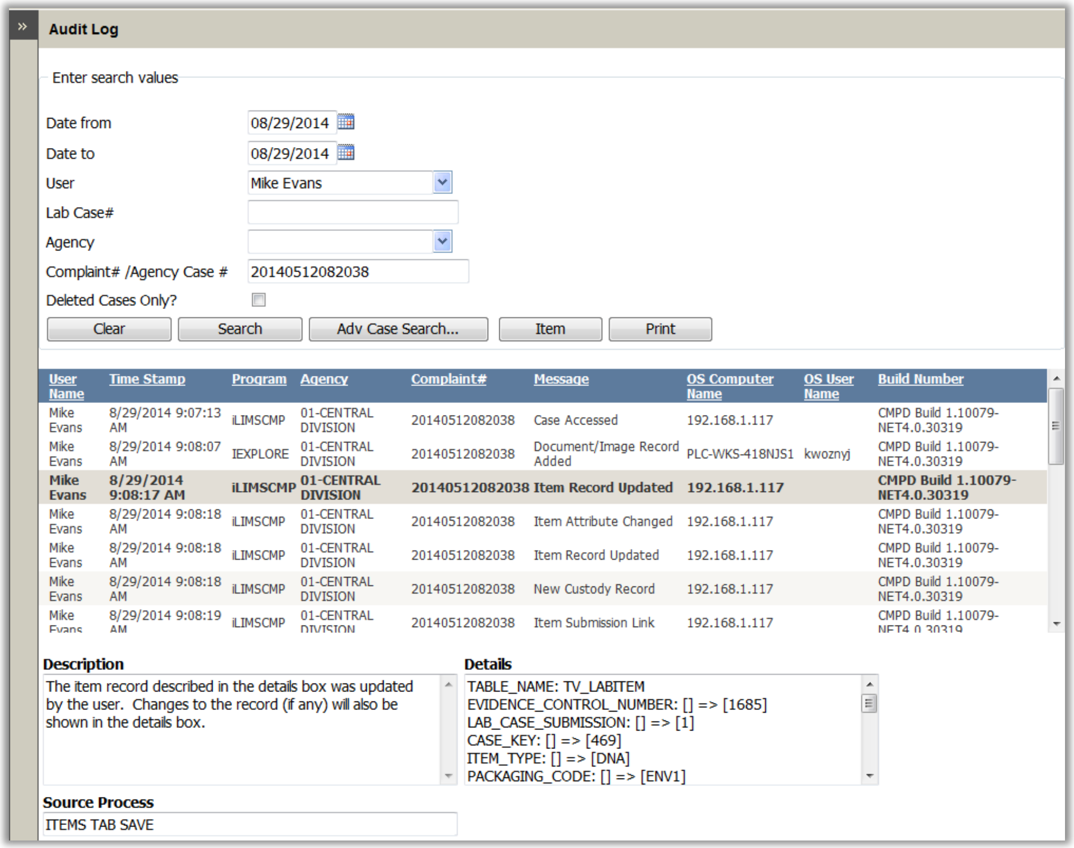
You can search for audit information by date range, system user, case number, or agency using the fields on the Audit Log screen. To run a search, enter at least one search value and click the **Search** button.

Figure 31: Audit Log screen



The search results will display in the bottom half of the screen. The grid columns display the User Name, Time Stamp, Program, Agency, Complaint #, and Message for each record. Clicking on a record in the search results will display additional information about that event in the **Description** and **Details** fields.

Figure 32: Audit Log search results

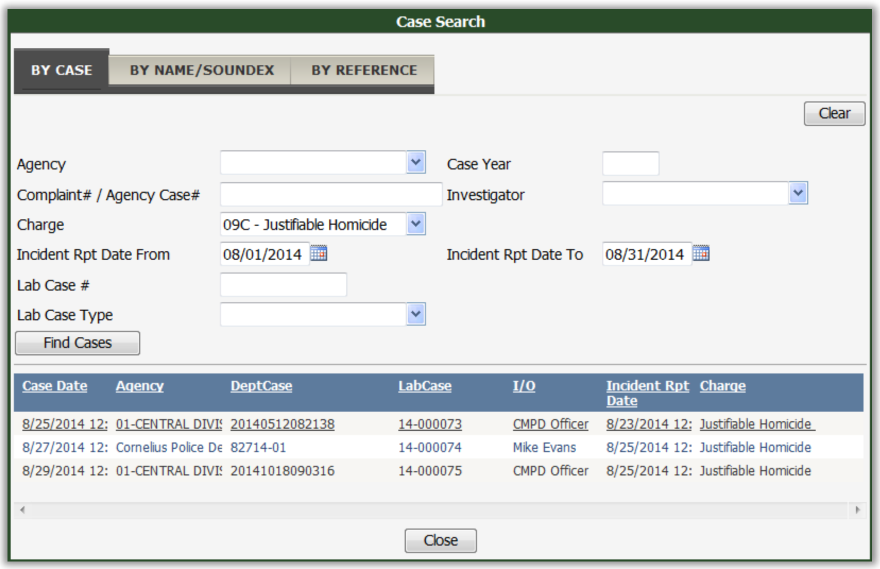


You can search for a case using additional criteria by clicking the **Adv. Case Search...** button. This will display the Case Search screen, shown below. There are three tabs on the Case Search screen. Each tab allows you to search for a case based on different types of information:

- The By Case tab is used to search based on general case information.
- The By Name/Soundex tab is used to search based on the case name information.
- The By Reference tab is used to search by a case reference.

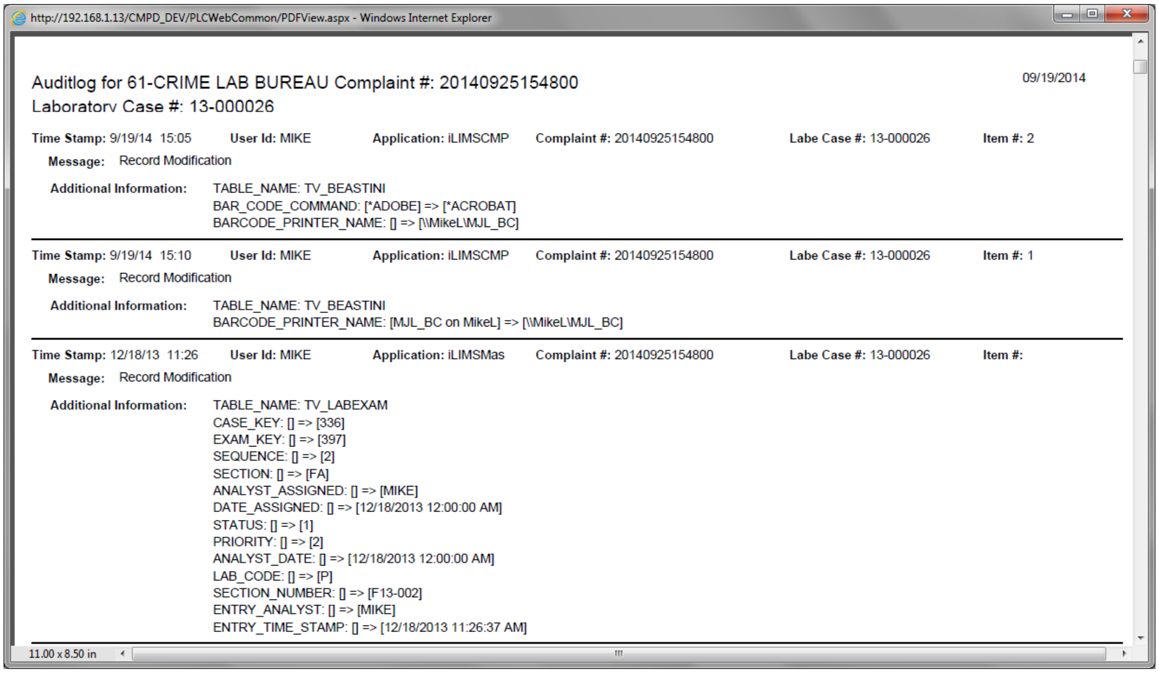
Select the tab you want to use. Enter at least one search value and click **Find Cases**. The results will display at the bottom of the screen. Once you've found the case, click on the case in the search results. The audit records for the selected case will display on the Audit Log screen.

Figure 33: Case Search screen



You can use the **Print** button to generate an audit report that will include all the records from the search results. An example of the audit report is shown below.

Figure 34: Audit report



http://192.168.1.13/CMPD_DEV/PLCWebCommon/PDFView.aspx - Windows Internet Explorer

Auditlog for 61-CRIME LAB BUREAU Complaint #: 20140925154800
Laboratory Case #: 13-000026

09/19/2014

Time Stamp: 9/19/14 15:05 **User Id:** MIKE **Application:** iLIMSCMP **Complaint #:** 20140925154800 **Labe Case #:** 13-000026 **Item #:** 2

Message: Record Modification

Additional Information:
TABLE_NAME: TV_BEASTINI
BAR_CODE_COMMAND: [*ADOBE] => [*ACROBAT]
BARCODE_PRINTER_NAME: [] => [\\MikeL\MJL_BC]

Time Stamp: 9/19/14 15:10 **User Id:** MIKE **Application:** iLIMSCMP **Complaint #:** 20140925154800 **Labe Case #:** 13-000026 **Item #:** 1

Message: Record Modification

Additional Information:
TABLE_NAME: TV_BEASTINI
BARCODE_PRINTER_NAME: [MJL_BC on MikeL] => [\\MikeL\MJL_BC]

Time Stamp: 12/18/13 11:26 **User Id:** MIKE **Application:** iLIMSMas **Complaint #:** 20140925154800 **Labe Case #:** 13-000026 **Item #:**

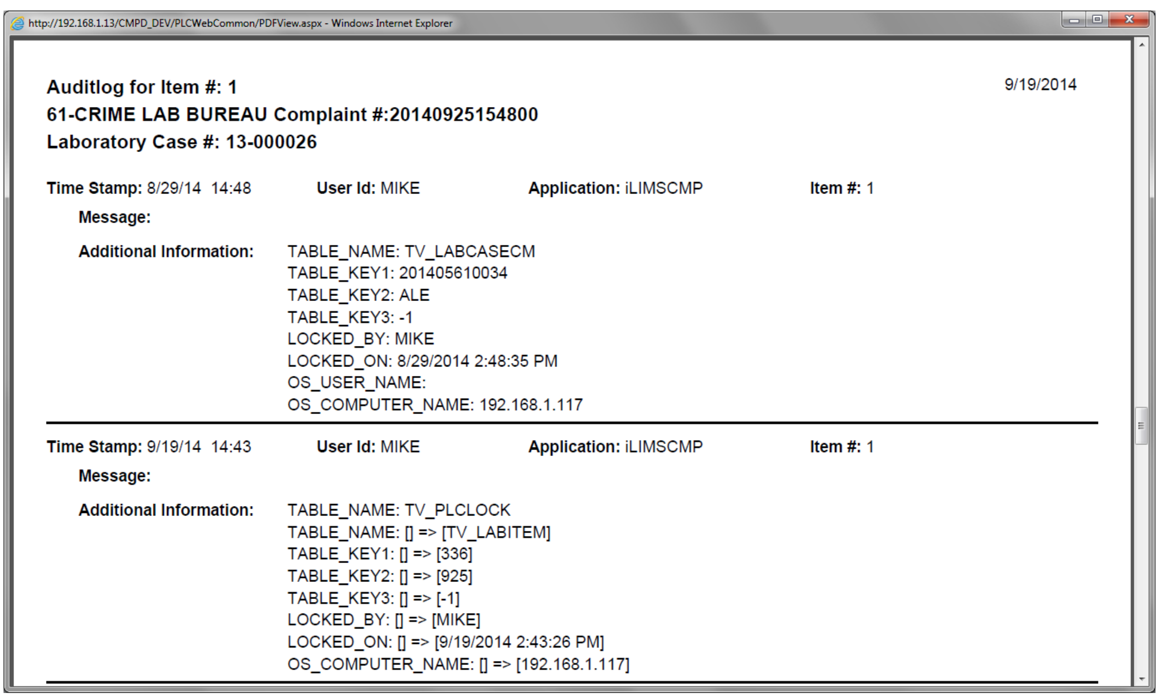
Message: Record Modification

Additional Information:
TABLE_NAME: TV_LABEXAM
CASE_KEY: [] => [336]
EXAM_KEY: [] => [397]
SEQUENCE: [] => [2]
SECTION: [] => [FA]
ANALYST_ASSIGNED: [] => [MIKE]
DATE_ASSIGNED: [] => [12/18/2013 12:00:00 AM]
STATUS: [] => [1]
PRIORITY: [] => [2]
ANALYST_DATE: [] => [12/18/2013 12:00:00 AM]
LAB_CODE: [] => [P]
SECTION_NUMBER: [] => [F13-002]
ENTRY_ANALYST: [] => [MIKE]
ENTRY_TIME_STAMP: [] => [12/18/2013 11:26:37 AM]

11.00 x 8.50 in

Selecting an item record in the search results will enable the **Item** button on the Audit Log screen. Clicking the button generates a report that includes all the audit records for the selected item, even the ones not listed in the search results.

Figure 35: Audit Item report



http://192.168.1.13/CMPD_DEV/PLCWebCommon/PDFView.aspx - Windows Internet Explorer

Auditlog for Item #: 1
61-CRIME LAB BUREAU Complaint #:20140925154800
Laboratory Case #: 13-000026

9/19/2014

Time Stamp: 8/29/14 14:48 **User Id:** MIKE **Application:** iLIMSCMP **Item #:** 1

Message:

Additional Information:
TABLE_NAME: TV_LABCASECM
TABLE_KEY1: 201405610034
TABLE_KEY2: ALE
TABLE_KEY3: -1
LOCKED_BY: MIKE
LOCKED_ON: 8/29/2014 2:48:35 PM
OS_USER_NAME:
OS_COMPUTER_NAME: 192.168.1.117

Time Stamp: 9/19/14 14:43 **User Id:** MIKE **Application:** iLIMSCMP **Item #:** 1

Message:

Additional Information:
TABLE_NAME: TV_PLCLOCK
TABLE_NAME: [] => [TV_LABITEM]
TABLE_KEY1: [] => [336]
TABLE_KEY2: [] => [925]
TABLE_KEY3: [] => [-1]
LOCKED_BY: [] => [MIKE]
LOCKED_ON: [] => [9/19/2014 2:43:26 PM]
OS_COMPUTER_NAME: [] => [192.168.1.117]

CONFIGURING ACTION ITEMS AND NOTIFICATIONS

1. Create your query. Make sure you include at least one key field that uniquely identifies the records you are selecting. They can be CASE_KEY, EVIDENCE_CONTROL_NUMBER, EXAM_KEY, or NAME_KEY. The order is not important.

```
Select
  TV_LABCASE.CASE_KEY,
  DEPARTMENT_CASE_NUMBER,
  TV_LISTTYPE.DESCRIPTION as LIST_TYPE,
  TV_ANALYST.NAME as REQUESTOR_NAME,
  TO_CHAR(TV_LISTMSTR.PREPARED_DATE,'MM/DD/YYYY') as REQUEST_DATE,
  TV_LISTMSTR.DESCRIPTION COMMENTS
from TV_LISTMSTR
  INNER JOIN TV_LABCASE on
     TV_LABCASE.CASE_KEY =  TV_LISTMSTR.CASE_KEY
  INNER JOIN TV_ANALYST on
     TV_ANALYST.ANALYST = TV_LISTMSTR.PREPARED_BY
  INNER JOIN TV_LISTTYPE on
     TV_LISTTYPE.CODE = TV_LISTMSTR.LIST_TYPE
WHERE
  TV_LISTMSTR.STATUS = 'A'
  and (TV_LISTMSTR.PREPARED_BY <> TV_LABCASE.CASE_MANAGER)
  and (TV_LISTMSTR.PREPARED_BY <> TV_LABCASE.CASE_ANALYST)  and
((TV_LABCASE.CASE_ANALYST = 'MIKE') or (TV_LABCASE.CASE_ANALYST = 'MIKE'))
```

2. Replace the "Context" fields with macros. In this case, 'MIKE' will be replaced by %USER% (Note: this query will no longer run in SQL DEVELOPER or SQLPLUS).

```
Select
  TV_LABCASE.CASE_KEY,
  DEPARTMENT_CASE_NUMBER,
  TV_LISTTYPE.DESCRIPTION as LIST_TYPE,
  TV_ANALYST.NAME as REQUESTOR_NAME,
  TO_CHAR(TV_LISTMSTR.PREPARED_DATE,'MM/DD/YYYY') as REQUEST_DATE,
  TV_LISTMSTR.DESCRIPTION COMMENTS
from TV_LISTMSTR
  INNER JOIN TV_LABCASE on
     TV_LABCASE.CASE_KEY =  TV_LISTMSTR.CASE_KEY
  INNER JOIN TV_ANALYST on
     TV_ANALYST.ANALYST = TV_LISTMSTR.PREPARED_BY
  INNER JOIN TV_LISTTYPE on
     TV_LISTTYPE.CODE = TV_LISTMSTR.LIST_TYPE
WHERE
  TV_LISTMSTR.STATUS = 'A'
  and (TV_LISTMSTR.PREPARED_BY <> TV_LABCASE.CASE_MANAGER)
  and (TV_LISTMSTR.PREPARED_BY <> TV_LABCASE.CASE_ANALYST)
  and ((TV_LABCASE.CASE_ANALYST = %USER%) or (TV_LABCASE.CASE_ANALYST = %USER%))
```

3. Create a "summary" version of your query. Summary queries are used to show the count of records only.

```
Select  count(*)
from TV_LISTMSTR
  INNER JOIN TV_LABCASE on
     TV_LABCASE.CASE_KEY =  TV_LISTMSTR.CASE_KEY
  INNER JOIN TV_ANALYST on
     TV_ANALYST.ANALYST = TV_LISTMSTR.PREPARED_BY
  INNER JOIN TV_LISTTYPE on
     TV_LISTTYPE.CODE = TV_LISTMSTR.LIST_TYPE
WHERE
  TV_LISTMSTR.STATUS = 'A'
  and (TV_LISTMSTR.PREPARED_BY <> TV_LABCASE.CASE_MANAGER)
  and (TV_LISTMSTR.PREPARED_BY <> TV_LABCASE.CASE_ANALYST)
  and ((TV_LABCASE.CASE_ANALYST = %USER%) or (TV_LABCASE.CASE_ANALYST = %USER%))
```

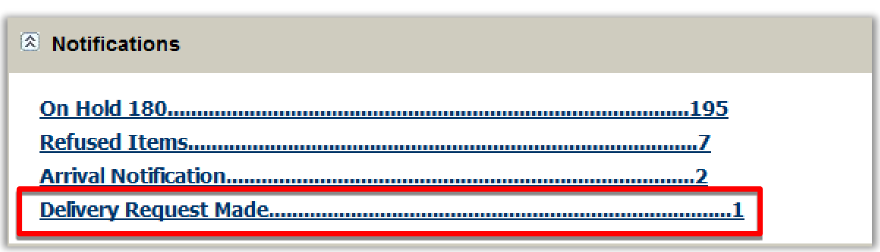
4. Come up with a name for your action item. Determine if it should appear in the Notification section or the Action Item section. Then, use SQL Developer (or similar) to add the row to the ACNITEM table.

Field	Value	Description
ACN Item Code	REQMADE	This is a key to identify your action item.
ACN Type Code	N	A)ction Item N)otification
Prompt	Delivery Request Made	This is the top-level text the user will see on the action item screen.
Description	A request for delivery has been made on one of your cases	This is a more descriptive second level phrase the user will see when he accesses the list of cases/items.
Response Type	1	Just put a one here.
Summary Query	Use the SQL query from Step 3 above	This is the query that will run your action item on the dashboard.
Action Page	ACTIONITEMS	Just put ACTIONITEMS here.
Detail DBGRID	AI_REQMADE	The Grid will be created in steps 8 and 9. You can wait until then to add this setting.
RPT Format Name	AI_REQMADE	Leave this blank if you do not plan to create or use a report.

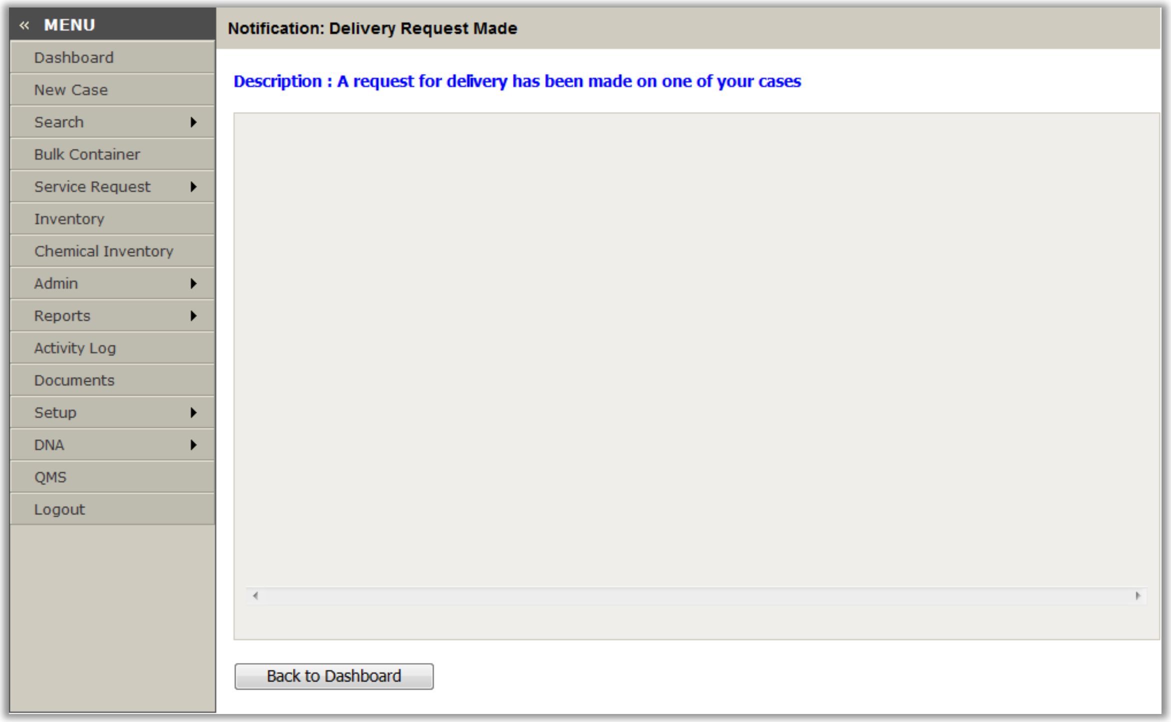
5. Link your new action item to an action item group (Note: users can be in one or more action item groups).

Field	Value	Description
ACN Group Code	*	An asterisk means the query will run for everyone.
Sequence	25	This is the order within the group that the action item will appear.
ACN Item Code	REQMADE	This is the tag or your new action item created in step 4.

6. You can test your action item now. If you don't see anything, it means there aren't any records that match your query, or, your query has an error in it. Check the log files. Copy, and paste into SQL Plus to find the error. If it's not in the log file, verify that the action item and action item group were linked correctly in step 5.



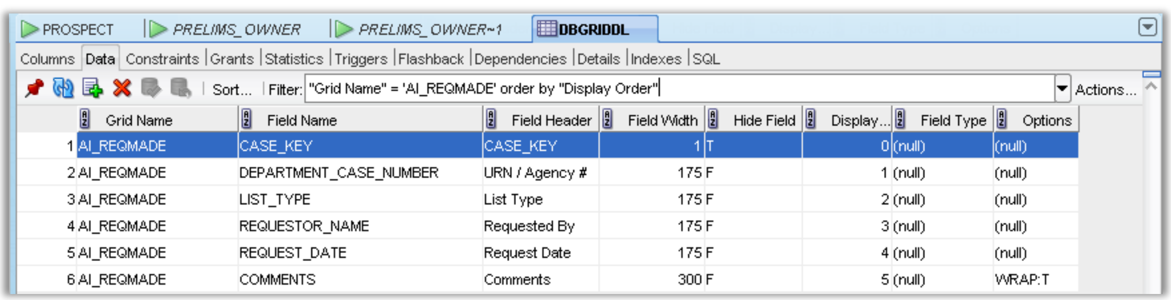
However, you can't click on it yet. There is more to do. (If you do, you will see a blank screen with the Prompt and Description entered in step 4.) Next, we need to define the layout for the records we want to see in the "Action items" screen. (Now is the time to add the "Detail DBGRID" setting to ACNITEM Table.)



7. Add a row to the DBGRIDHD table for your action item.

Field	Value	Description
Grid Name	AI_REQMADE	AI_ + the Key for your action item from step 4.
SQL String	Your query from step 2	

8. Add rows to the DBGRIDDL table to determine how the data appears (Note: you can add one field at a time to make it easier to find your mistake).



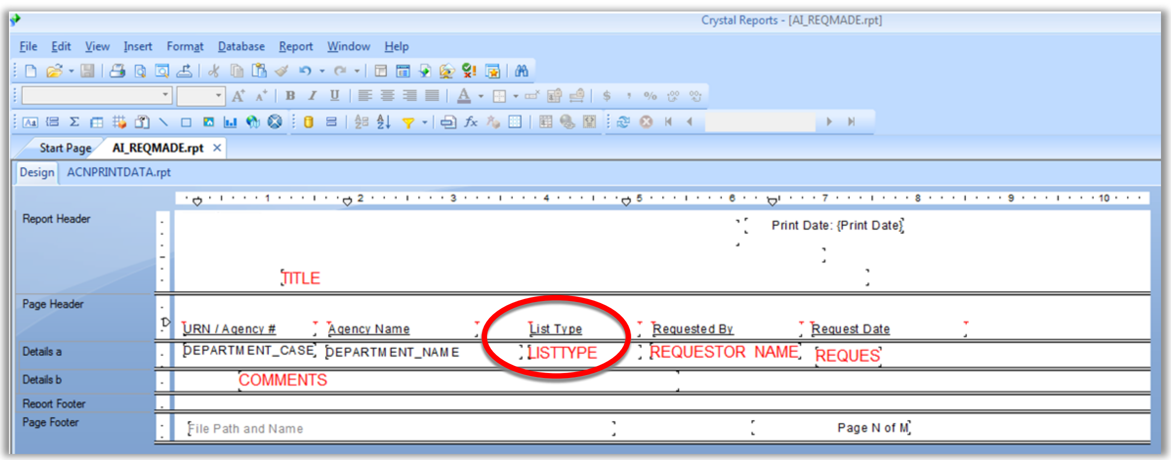
9. The grid can now be viewed.

10. You can define a report that will print the contents of the Action Item. This is a special type of crystal report. The report should be named the same as the DBGRIDHD.

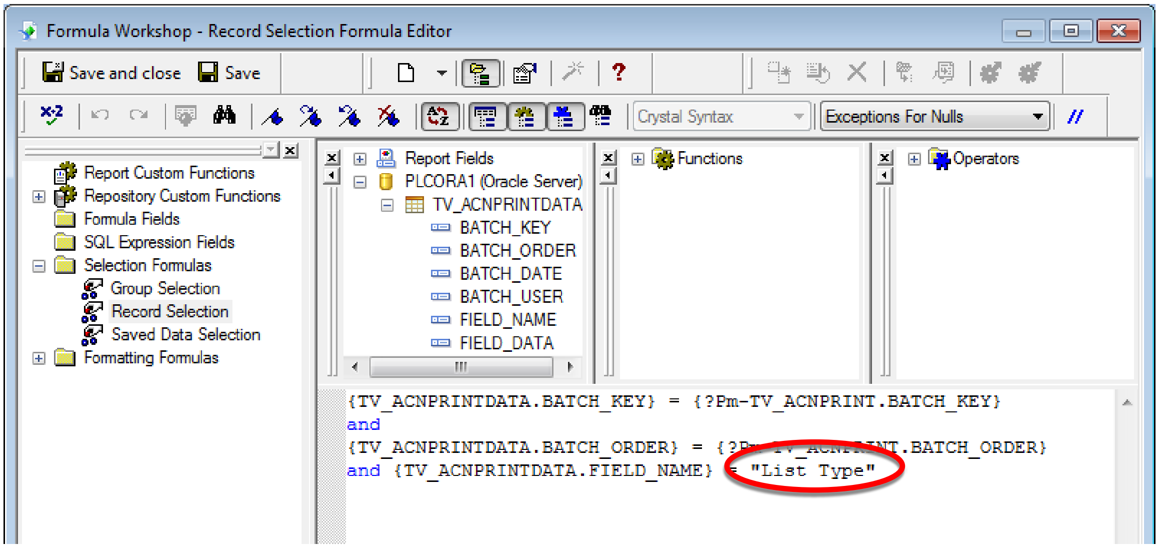
Report Name	AI_REQMADE.RPT
Location to store	In the CUSTOM reports folder under you application's virtual directory.

The action item screen is user-definable, so each report will need to be custom made. To make this job easier, the data that corresponds to the action item is written to two temporary tables, ACNPRINT and ACNPRINTDATA. The batch key to the data is passed into crystal reports when the user clicks the Print button.

Note: A sub-report is used to pull the data from the ACNPRINDATA table.



Change the selection formula in the subreport to select the row you want from ACNPRINTDATA.



SPECIAL TRIGGERS, STORED PROCEDURES, AND VIEWS

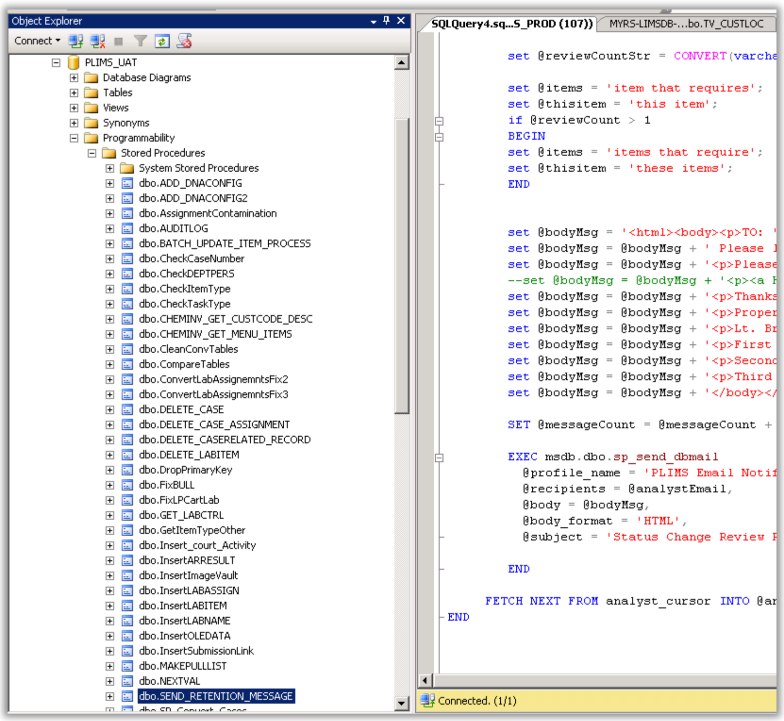
EMAIL NOTIFICATION FOR PLIMS RETENTION REVIEW

Notification Objective: Send an email every morning to a PLIMS user that has pending retention review to complete. There are three parts to this configuration:

1. Setup the Stored Procedure that defines the objective (retention review required notification)
2. Setup the Database Email
3. Setup the Job to call the stored procedure and send the email

SETUP STORED PROCEDURE

Create a Stored Procedure on http://myrs-limsweb-01/PLIMSPROD/ called Dbo.SEND_RETENTION_MESSAGE.



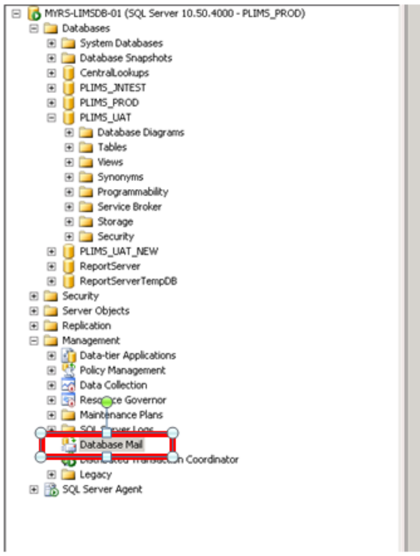
```
USE [PLIMS_UAT]
GO
/****** Object:  StoredProcedure [dbo].[SEND_RETENTION_MESSAGE]    Script Date: 03/18/2014 15:42:17 ******/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO

ALTER PROCEDURE [dbo].[SEND_RETENTION_MESSAGE]
AS
BEGIN

    SET NOCOUNT ON;

    DECLARE @analystID VARCHAR(50);
    DECLARE @analystName VARCHAR(50);
```

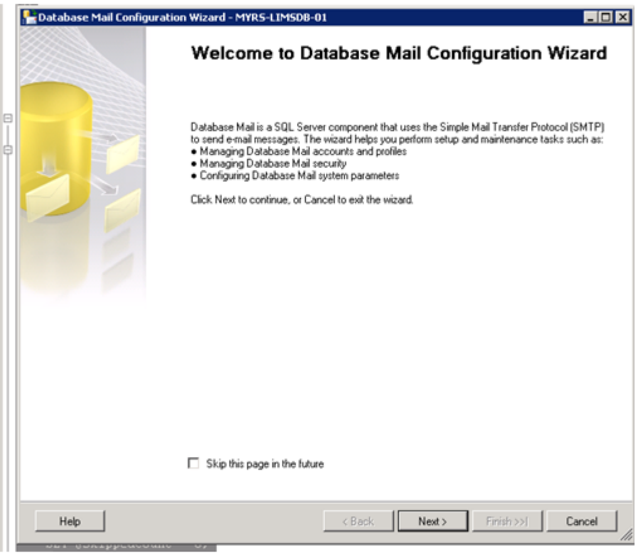
```
    DECLARE @analystEmail VARCHAR(50);

    DECLARE @items VARCHAR(50);
    DECLARE @thisitem VARCHAR(50);

     DECLARE @reviewCount int;

     DECLARE @reviewCountStr VARCHAR(20);

     DECLARE @messageCount int;
     DECLARE @messageCountStr VARCHAR(20);

     DECLARE @skippedCount int;
     DECLARE @skippedCountStr varchar(20);

     DECLARE @adminAddress VARCHAR(200);

     SET @messageCount = 0;
     SET @skippedCount = 0;

     DECLARE @bodyMsg VARCHAR(2000);

    DECLARE analyst_cursor CURSOR FOR
      SELECT ANALYST, NAME, EMAIL_ADDRESS FROM PLIMS_UAT.DBO.TV_ANALYST;

    OPEN analyst_cursor;

    FETCH NEXT FROM analyst_cursor
     INTO @analystID, @analystName, @analystEmail;

    WHILE @@FETCH_STATUS = 0
    BEGIN

    SELECT @reviewCount = COUNT(*) FROM PLIMS_UAT.DBO.TV_REVREQUEST RR
            INNER JOIN PLIMS_UAT.DBO.TV_LABITEM LI ON RR.EVIDENCE_CONTROL_NUMBER =
LI.EVIDENCE_CONTROL_NUMBER
            INNER JOIN PLIMS_UAT.DBO.TV_LABCASE LC ON LI.CASE_KEY = LC.CASE_KEY
            AND ((RR.REVIEW_STATUS = '1' AND (LC.CASE_MANAGER = @analystID OR
LC.CASE_ANALYST = @analystID))
            OR (RR.REVIEW_STATUS = '2' AND RR.FINAL_REVIEW_BY = @analystID));

         if (@reviewCount > 0) and ((LEN(@analystEmail) = 0) or (@analystEmail IS NULL))
           SET @skippedCount = @skippedCount + 1;

         if (@reviewCount > 0) and (LEN(@analystEmail) > 0)
         BEGIN

         set @reviewCountStr = CONVERT(varchar(10), @reviewCount);

         set @items = 'item that requires';
         set @thisitem = 'this item';
         if @reviewCount > 1
         BEGIN
         set @items = 'items that require';
         set @thisitem = 'these items';
         END

         set @bodyMsg = '<html><body><p>TO: ' + @analystName + '(' + @analystID +
')</p><p>This is to notify you that you have ' + @reviewCountStr + ' ' + @items + ' a
second approval review.';
         set @bodyMsg = @bodyMsg + ' Please log into the PLIMS and either agree or
disagree with this request.</p>';
         set @bodyMsg = @bodyMsg + '<p>Please do this as soon as possible. Please feel
free to contact us at 704-336-2033 if you have any questions or concerns.</p>';
         --set @bodyMsg = @bodyMsg + '<p><a HREF="http://myrs-limsweb-01/PLIMSPROD/">PLIMS
Login</a></p>';
```

```
        set @bodyMsg = @bodyMsg + '<p>Thanks</p>';
        set @bodyMsg = @bodyMsg + '<p>Property and Evidence Management Team</p>';
        set @bodyMsg = @bodyMsg + '<p>Lt. Brian Russell - brussell1@cmpd.org - 704-502-
5985</p>';
        set @bodyMsg = @bodyMsg + '<p>First Shift Supervisor - Carolyn Carr -
ccarr@cmpd.org - 704-432-6780</p>';
        set @bodyMsg = @bodyMsg + '<p>Second Shift Supervisor - David Crowley -
dcrowley@cmpd.org - 704-562-5023</p>';
        set @bodyMsg = @bodyMsg + '<p>Third Shift Supervisor - Tonya Scott -
tscott@cmpd.org - 704-336-2033</p>';
        set @bodyMsg = @bodyMsg + '</body></html>';

        SET @messageCount = @messageCount + 1;

        EXEC msdb.dbo.sp_send_dbmail
          @profile_name = 'PLIMS Email Notification Profile',
          @recipients = @analystEmail,
          @body = @bodyMsg,
          @body_format = 'HTML',
          @subject = 'Status Change Review Required' ;

        END

     FETCH NEXT FROM analyst_cursor INTO @analystID, @analystName, @analystEmail;
END

     CLOSE analyst_cursor;

   DEALLOCATE analyst_cursor;

   SET @messageCountStr = CONVERT(varchar(10), @messageCount);
   SET @skippedCountStr = CONVERT(varchar(10), @skippedCount);

   SET @bodyMsg = '<p>Notification messages have been sent to ' + @messageCountStr + '
users.</p>';

   if @skippedCount > 0
   SET @bodyMsg = @bodyMsg + '<p>Messages to ' + @skippedCountStr + ' users were skipped
because they do not have an email address defined.</p>';

   SET @adminAddress =
'brussell1@cmpd.org;ccarr@cmpd.org;dcrowley@cmpd.org;tscott@cmpd.org;mevans@porterlee.com;
dsanchez@cmpd.org;sarahm@porterlee.com';

   EXEC msdb.dbo.sp_send_dbmail
          @profile_name = 'PLIMS Email Notification Profile',
          @recipients = @adminAddress,
          @body = @bodyMsg,
          @body_format = 'HTML',
          @subject = 'Status Change Notification Completed';

END
```

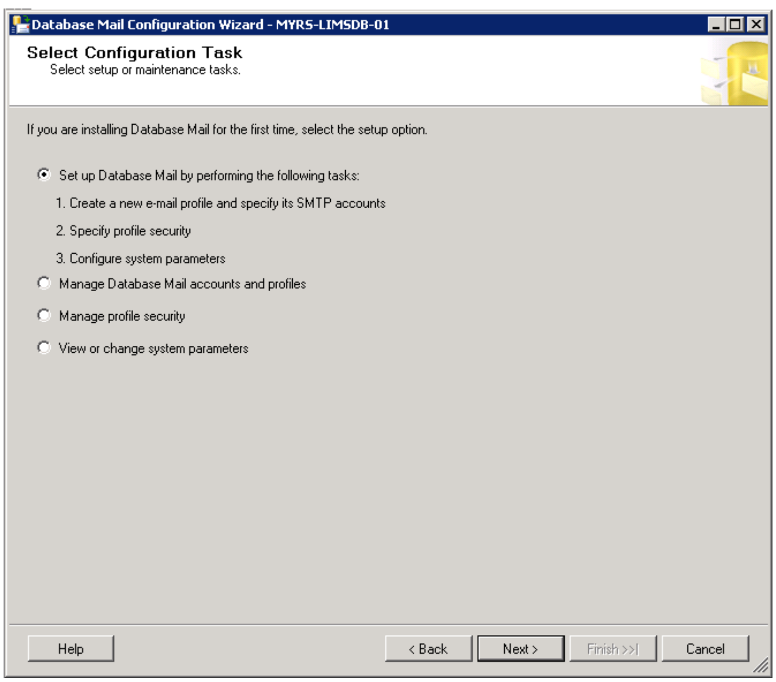
SETUP DATABASE EMAIL

1. Right Click on Database Email and click Create. Then click Next.

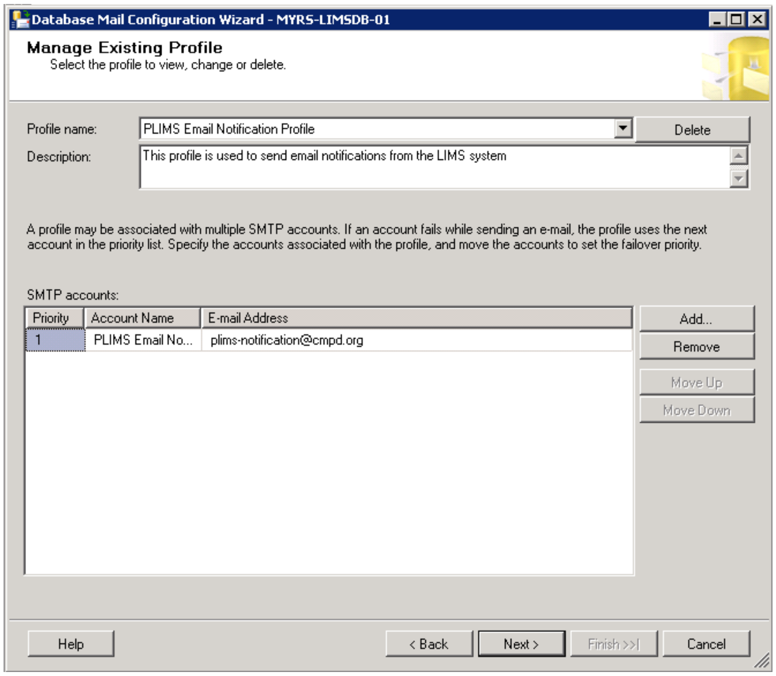




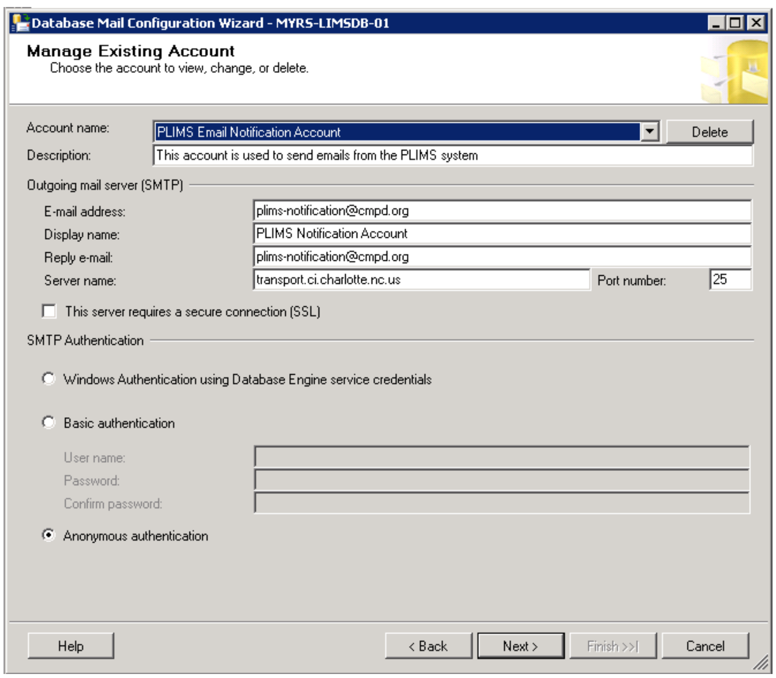
2. Click Next.



3. Click Add and define a profile. Note: This profile needs to be called in the stored procedure.

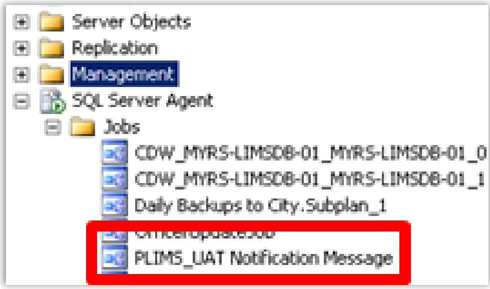


4. The email server name will need to be provided by the customer. Verify that anonymous can be used. Click Next and Close.



SETUP JOB TO CALL STORED PROCEDURE

1. Right click on Jobs and create a new job called PLIMS_UAT Notification Message.

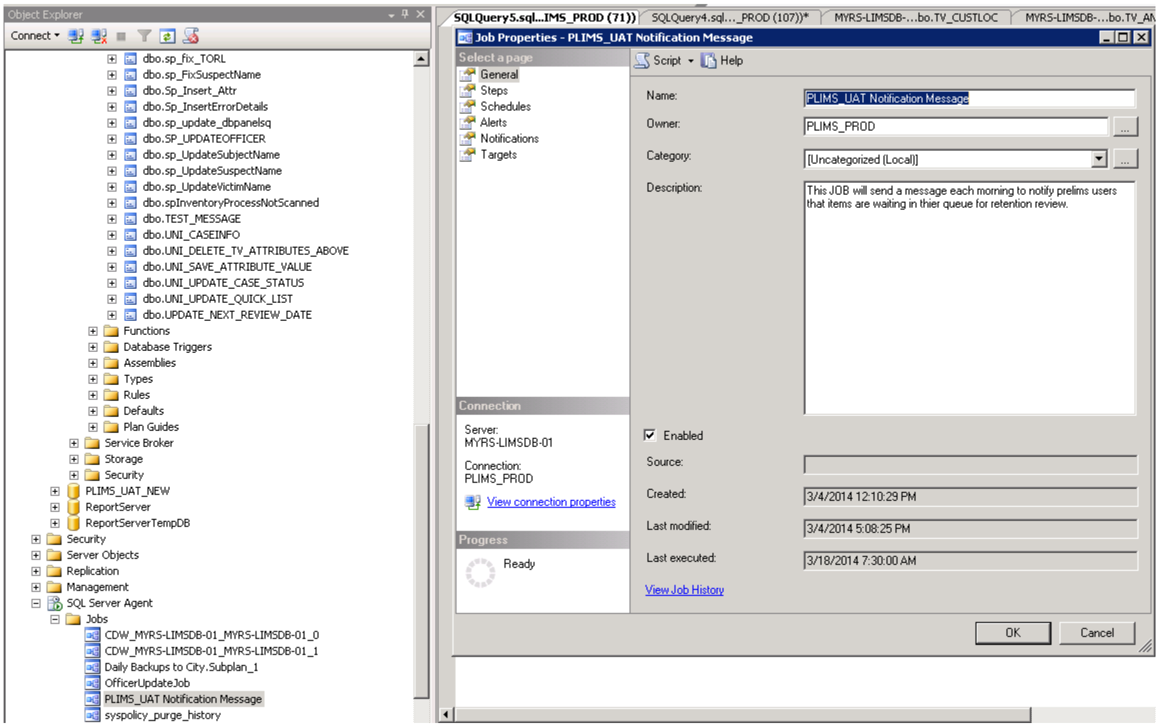


2. Create the Notification script.

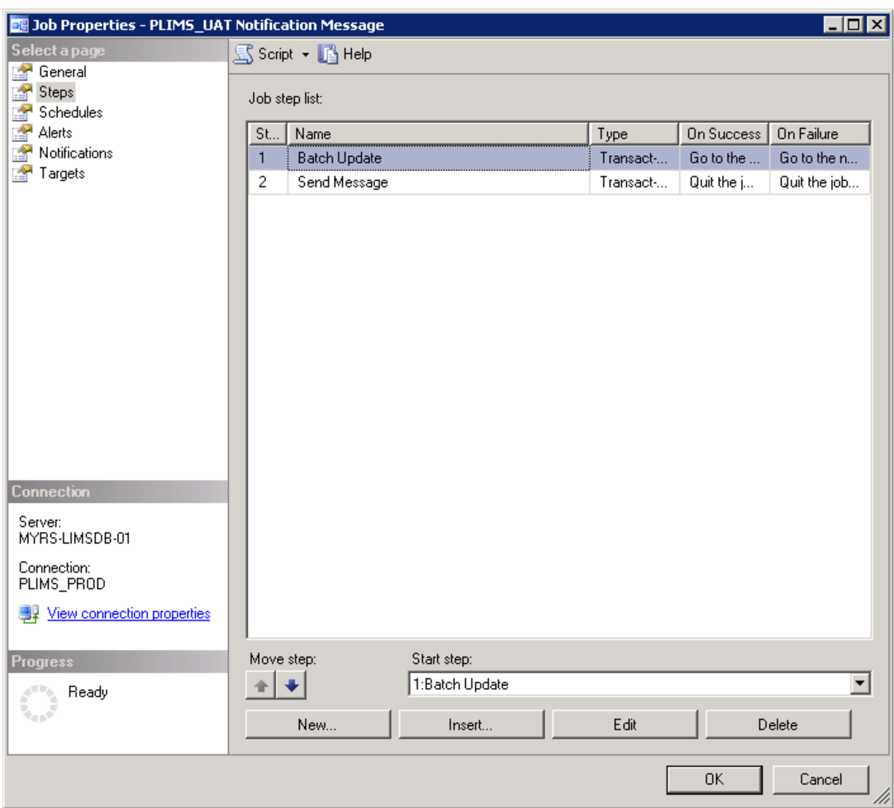
```
USE [msdb]
GO

/****** Object:  Job [PLIMS_UAT Notification Message]    Script Date: 03/18/2014
16:02:17 ******/
BEGIN TRANSACTION
DECLARE @ReturnCode INT
SELECT @ReturnCode = 0
/****** Object:  JobCategory [[Uncategorized (Local)]]]    Script Date: 03/18/2014
16:02:17 ******/
IF NOT EXISTS (SELECT name FROM msdb.dbo.syscategories WHERE name=N'[Uncategorized
(Local)]' AND category_class=1)
BEGIN
EXEC @ReturnCode = msdb.dbo.sp_add_category @class=N'JOB', @type=N'LOCAL',
@name=N'[Uncategorized (Local)]'
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback

END

DECLARE @jobId BINARY(16)
EXEC @ReturnCode =  msdb.dbo.sp_add_job @job_name=N'PLIMS_UAT Notification Message',
             @enabled=1,
             @notify_level_eventlog=0,
             @notify_level_email=0,
             @notify_level_netsend=0,
             @notify_level_page=0,
             @delete_level=0,
             @description=N'This JOB will send a message each morning to notify
prelims users that items are waiting in thier queue for retention review.',
             @category_name=N'[Uncategorized (Local)]',
             @owner_login_name=N'PLIMS_PROD', @job_id = @jobId OUTPUT
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback
/****** Object:  Step [Batch Update]    Script Date: 03/18/2014 16:02:18 ******/
EXEC @ReturnCode = msdb.dbo.sp_add_jobstep @job_id=@jobId, @step_name=N'Batch Update',
             @step_id=1,
             @cmdexec_success_code=0,
             @on_success_action=3,
             @on_success_step_id=0,
             @on_fail_action=3,
             @on_fail_step_id=0,
             @retry_attempts=0,
             @retry_interval=0,
             @os_run_priority=0, @subsystem=N'TSQL',
             @command=N'EXEC BATCH_UPDATE_ITEM_PROCESS',
             @database_name=N'PLIMS_UAT',
             @flags=0
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback
/****** Object:  Step [Send Message]    Script Date: 03/18/2014 16:02:18 ******/
```

```
EXEC @ReturnCode = msdb.dbo.sp_add_jobstep @job_id=@jobId, @step_name=N'Send Message',
             @step_id=2,
             @cmdexec_success_code=0,
             @on_success_action=1,
             @on_success_step_id=0,
             @on_fail_action=2,
             @on_fail_step_id=0,
             @retry_attempts=0,
             @retry_interval=0,
             @os_run_priority=0, @subsystem=N'TSQL',
             @command=N'EXEC PLIMS_UAT.DBO.SEND_RETENTION_MESSAGE',
             @database_name=N'PLIMS_UAT',
             @flags=0
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback
EXEC @ReturnCode = msdb.dbo.sp_update_job @job_id = @jobId, @start_step_id = 1
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback
EXEC @ReturnCode = msdb.dbo.sp_add_jobschedule @job_id=@jobId, @name=N'7:30 Every
Morning',
             @enabled=1,
             @freq_type=4,
             @freq_interval=1,
             @freq_subday_type=1,
             @freq_subday_interval=0,
             @freq_relative_interval=0,
             @freq_recurrence_factor=0,
             @active_start_date=20140304,
             @active_end_date=99991231,
             @active_start_time=73000,
             @active_end_time=235959,
             @schedule_uid=N'2ca9a6db-ab37-4467-af34-94950f8ea0f8'
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback
EXEC @ReturnCode = msdb.dbo.sp_add_jobserver @job_id = @jobId, @server_name =
N'(local)'
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback
COMMIT TRANSACTION
GOTO EndSave
QuitWithRollback:
    IF (@@TRANCOUNT > 0) ROLLBACK TRANSACTION
EndSave:

GO
```

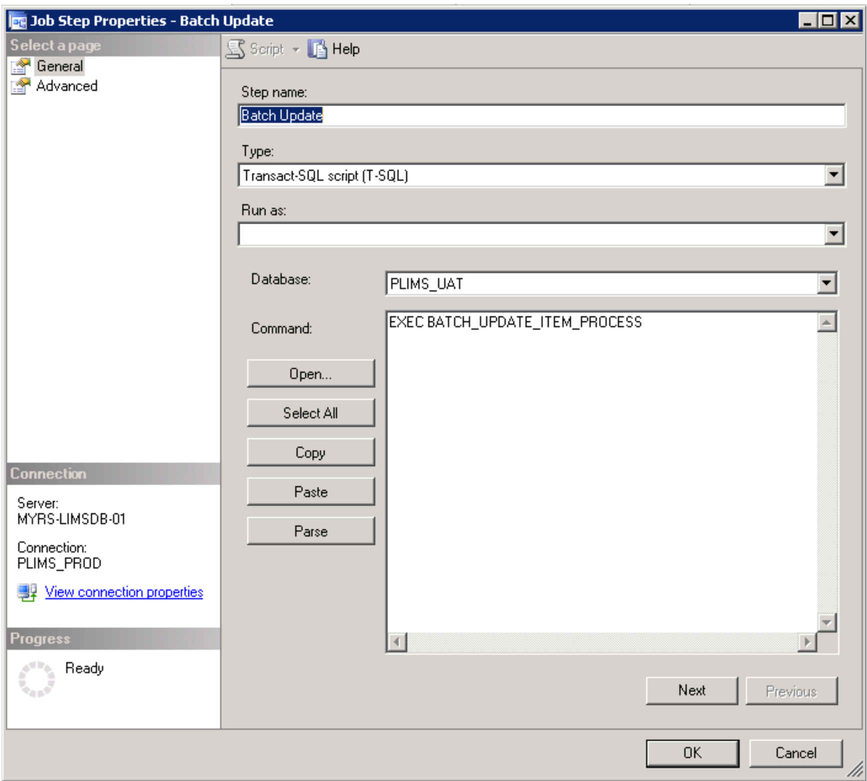
3. Right click on the job and select Properties.



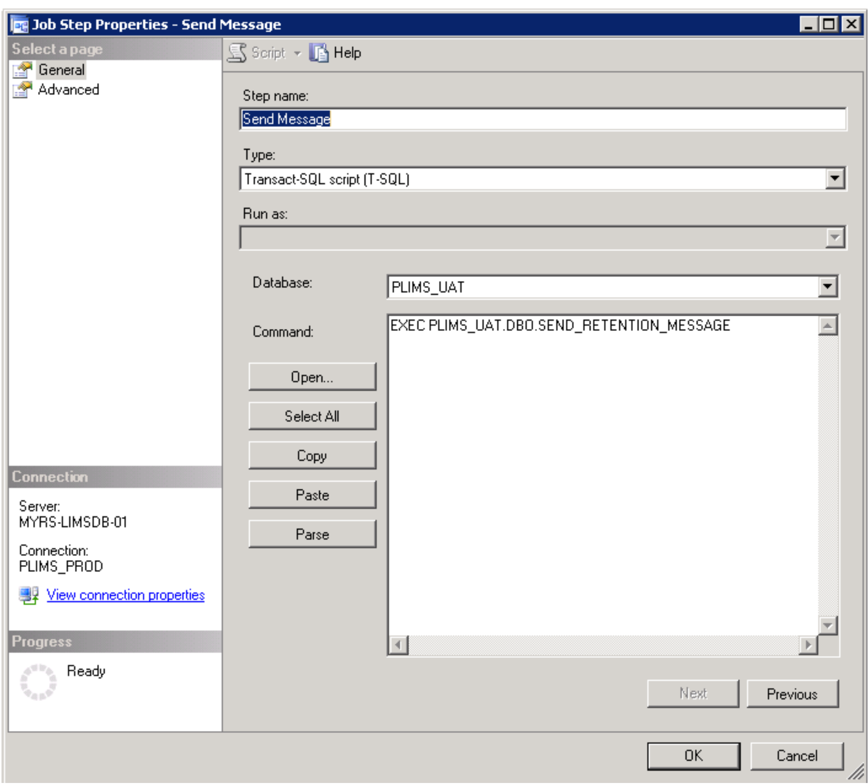
4. Click Steps. Step 1 is running the Batch Update procedure (ignore this for now as the focus of this documentation is the email notification). Step 2 is the Send Message.



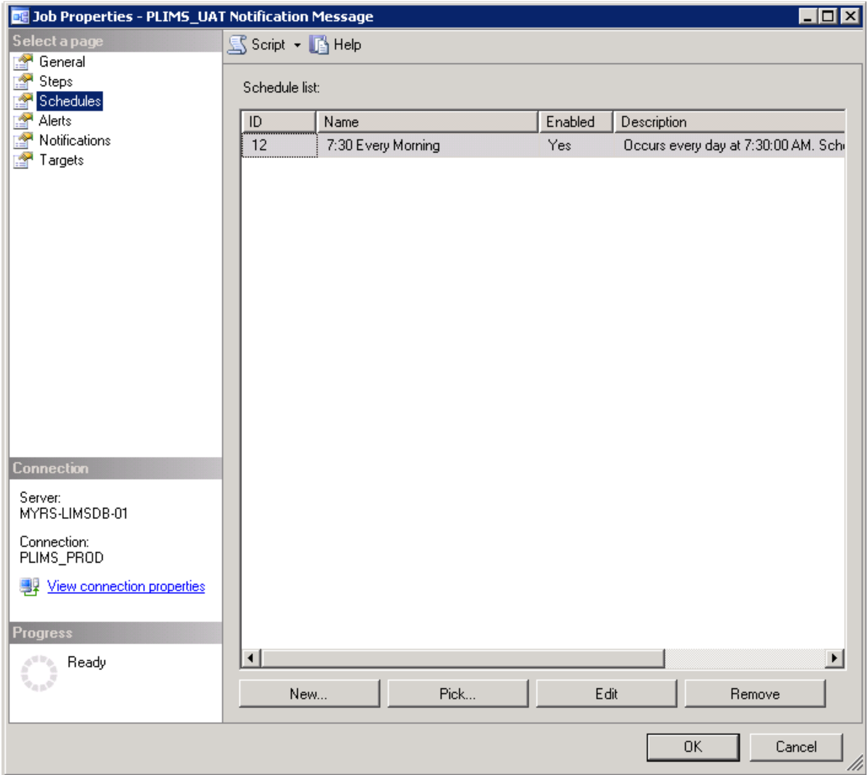
5. Click Edit on Batch Update.



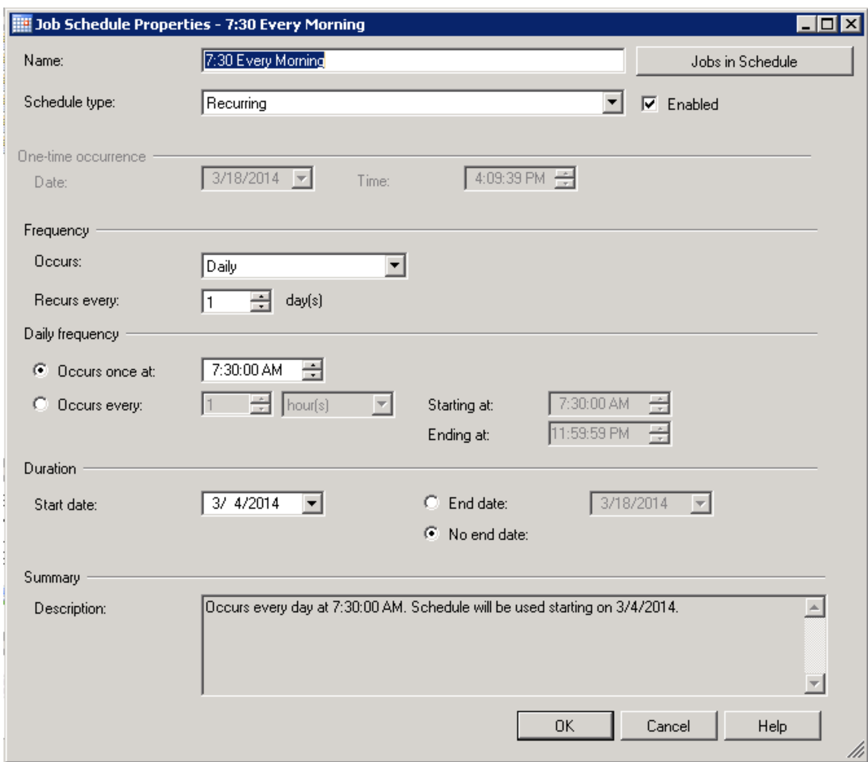
6. Click Edit on Send Message.



7. Click OK and select Schedule.

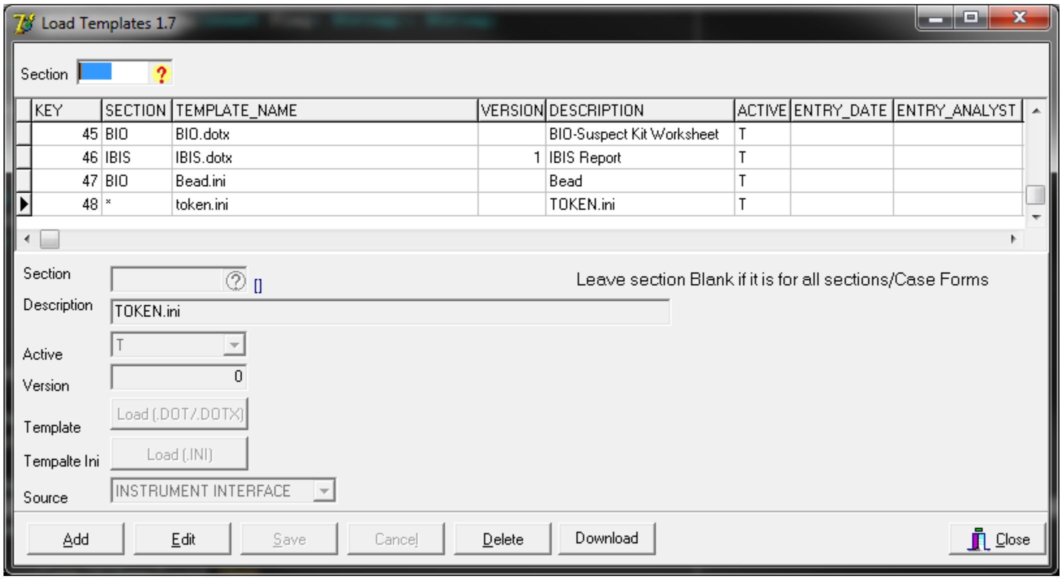


8. Click Edit to adjust time. Click Ok.

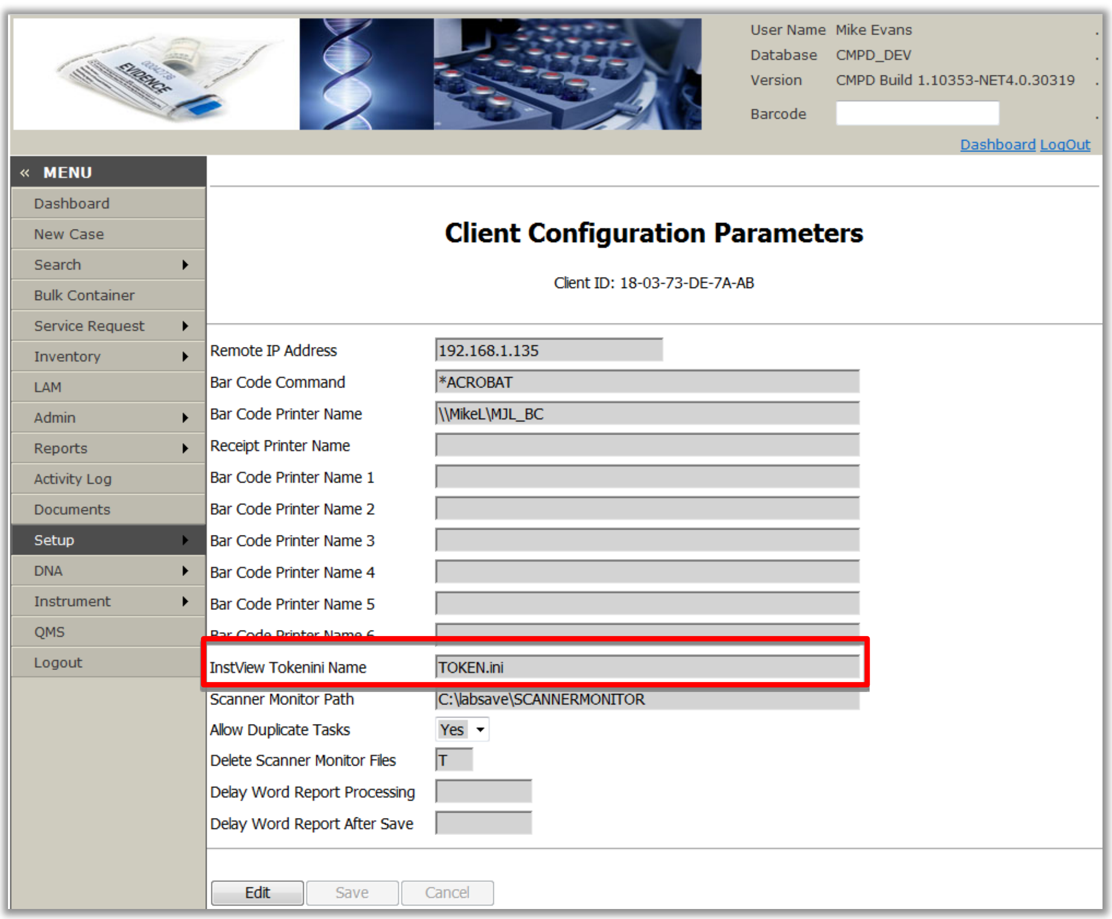


INSTVIEW

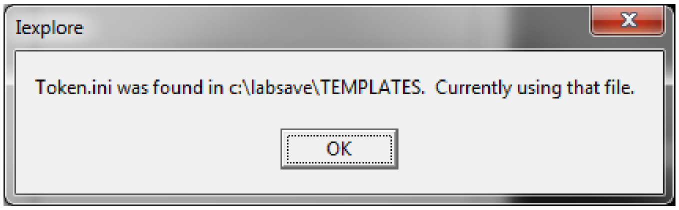
1. Upload the Token.ini file you need to the database using the Template.exe program. Set the Source to be INSTRUMENT INTERFACE.



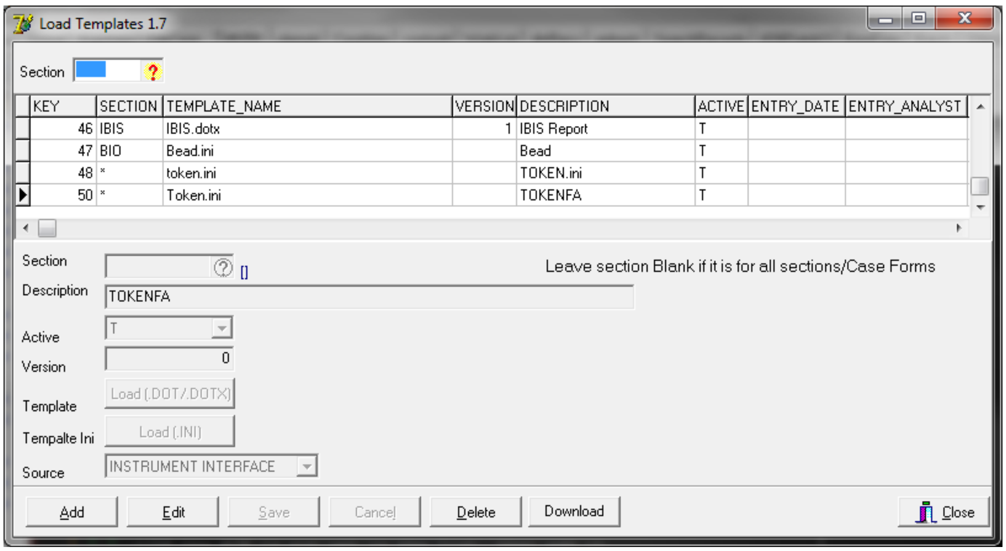
2. From the Workstation Setup in PLIMS, enter the description you entered in Template.exe into the **InstView Tokenini Name** field.

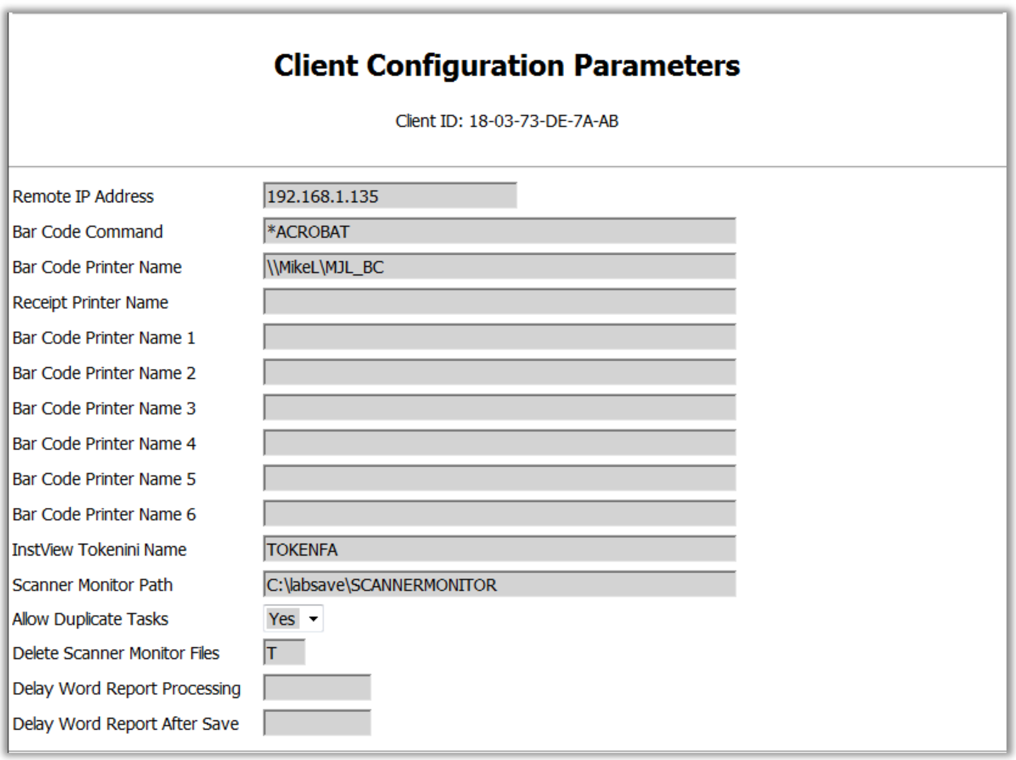


3. If a TOKEN.ini file is placed in the C:\Labsave\Templates folder, the program will always use that version of the .ini file, and it won't pull down a new one when InstView is loaded. It will notify you if it is setup this way.



4. The program is designed to handle multiple setups, with different .ini files on different machines. In this case, you would upload each separate .ini file using the Template.exe program. Then in the Workstation Setup, you define which one that machine uses. In the screenshots below, this machine would pull down the TOKENFA file.

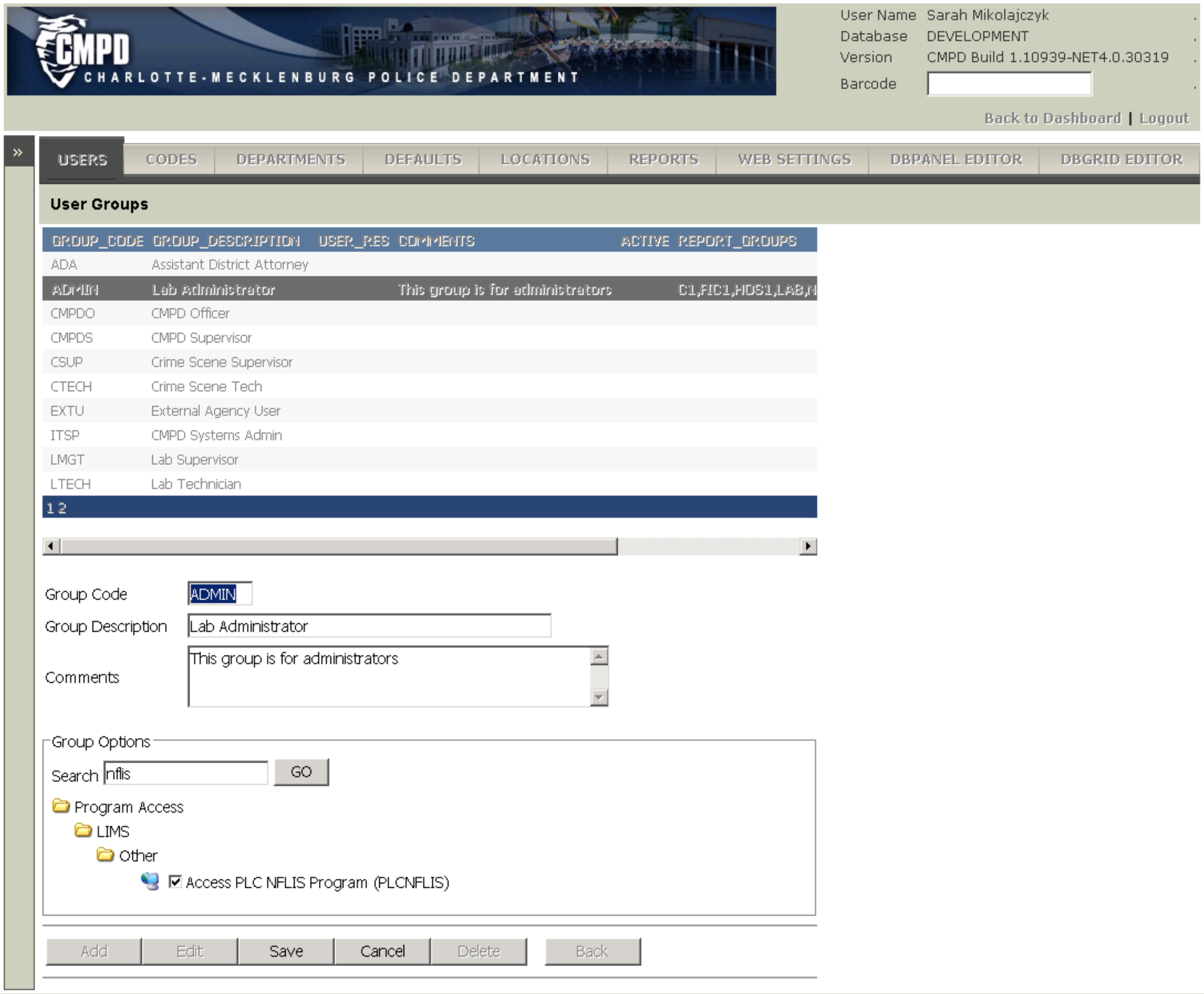




SETTTING UP NFLIS

Step 1

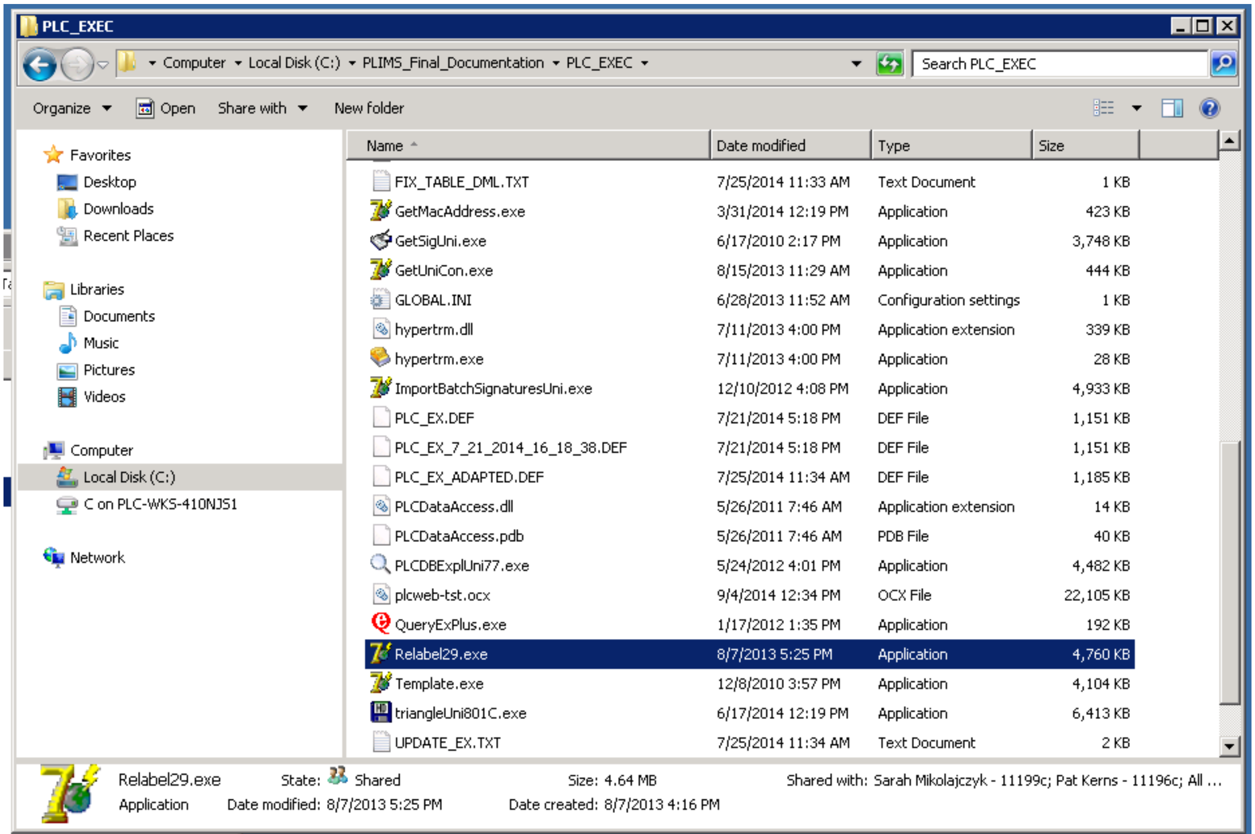
Edit security for users so they have access to Triangle Application. Enable security option "Access PLC NFLIS Program (PLCNFLIS)"

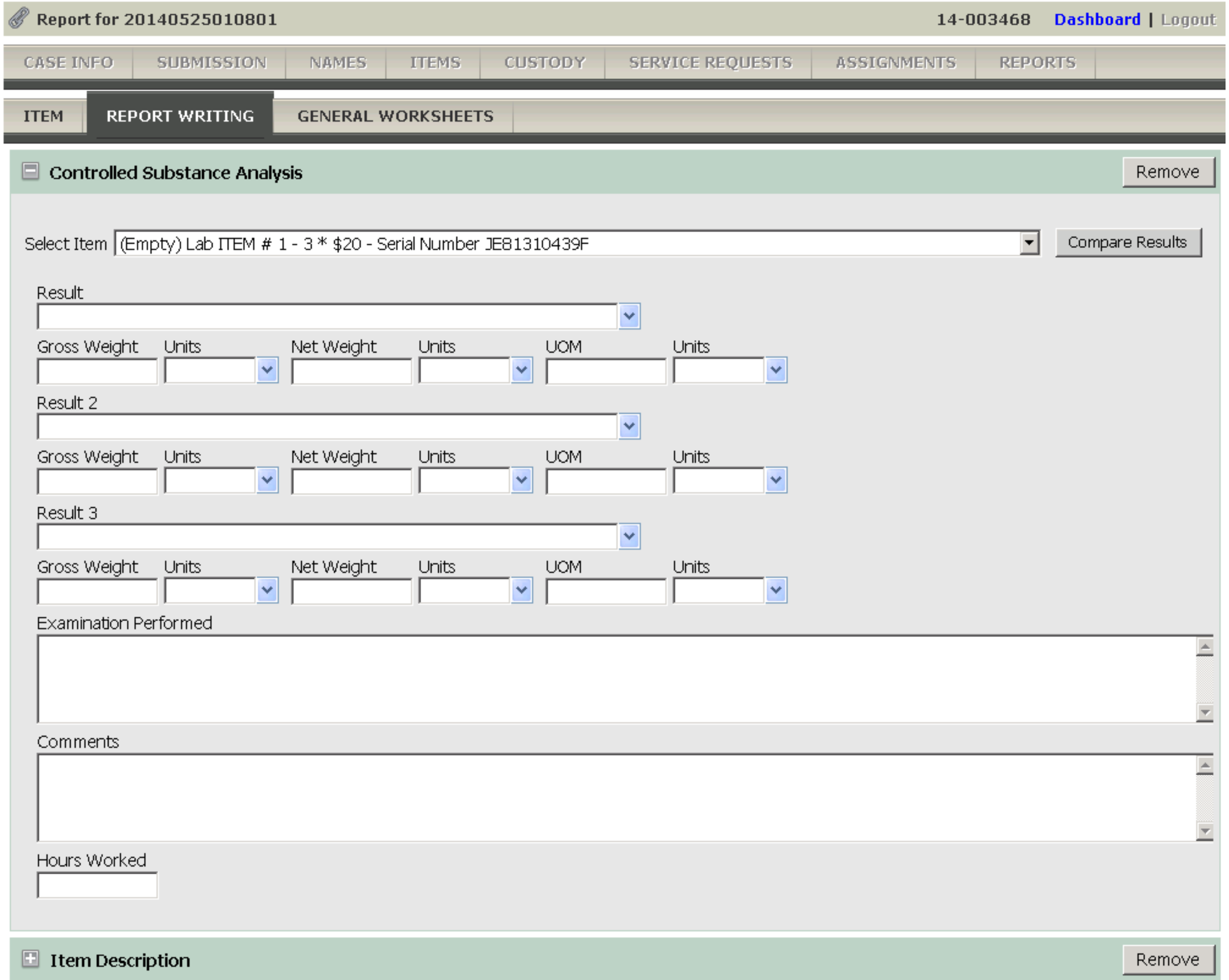


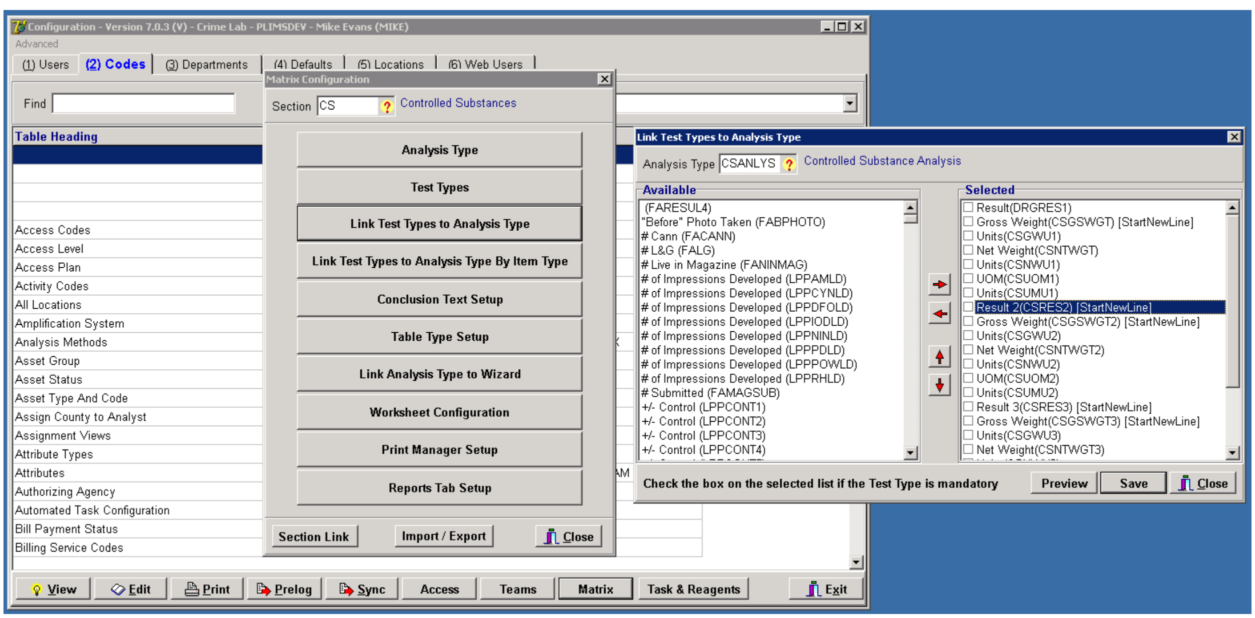
Step 2

Run triangleUNI801c.exe to configure and submit information to NFLIS.

NOTE: When using this application the ftp.rti.org.key file must be in the same directory as the executable. This file contains encryption information the program needs to make the SFTP connection.

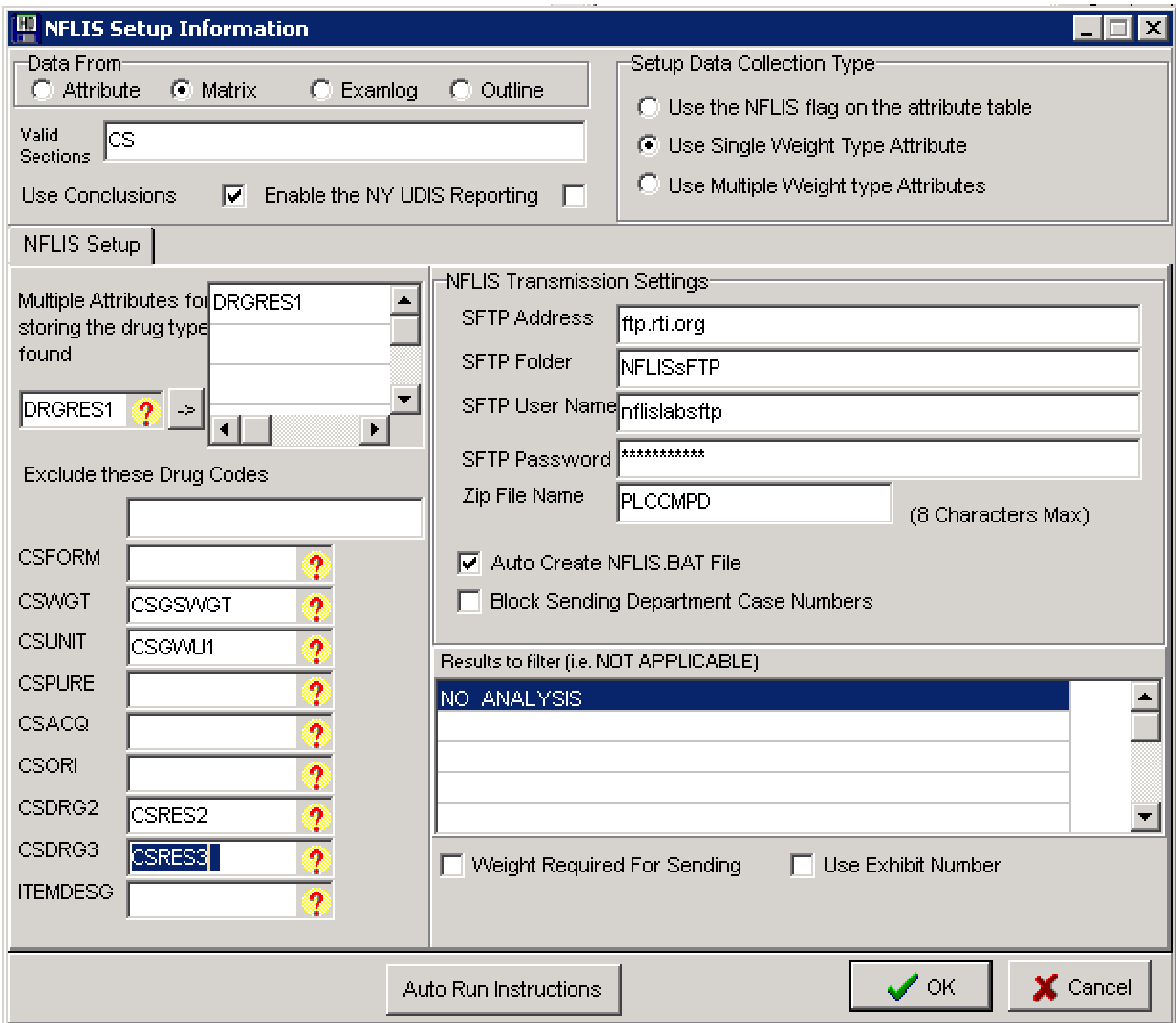

PLC_EXEC
Computer ▸ Local Disk (C:) ▸ PLIMS_Final_Documentation ▸ PLC_EXEC
Search PLC_EXEC
Organize
Open
Share with
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
Local Disk (C:)
C on PLC-WKS-410NJS1
Network
Name
Date modified
Type
Size
FIX_TABLE_DML.TXT 7/25/2014 11:33 AM Text Document 1 KB
GetMacAddress.exe 3/31/2014 12:19 PM Application 423 KB
GetSigUni.exe 6/17/2010 2:17 PM Application 3,748 KB
GetUniCon.exe 8/15/2013 11:29 AM Application 444 KB
GLOBAL.INI 6/28/2013 11:52 AM Configuration settings 1 KB
hypertrm.dll 7/11/2013 4:00 PM Application extension 339 KB
hypertrm.exe 7/11/2013 4:00 PM Application 28 KB
ImportBatchSignaturesUni.exe 12/10/2012 4:08 PM Application 4,933 KB
PLC_EX.DEF 7/21/2014 5:18 PM DEF File 1,151 KB
PLC_EX_7_21_2014_16_18_38.DEF 7/21/2014 5:18 PM DEF File 1,151 KB
PLC_EX_ADAPTED.DEF 7/25/2014 11:34 AM DEF File 1,185 KB
PLCDataAccess.dll 5/26/2011 7:46 AM Application extension 14 KB
PLCDataAccess.pdb 5/26/2011 7:46 AM PDB File 40 KB
PLCDBExplUni77.exe 5/24/2012 4:01 PM Application 4,482 KB
plcweb-tst.ocx 9/4/2014 12:34 PM OCX File 22,105 KB
QueryExPlus.exe 1/17/2012 1:35 PM Application 192 KB
Relabel29.exe 8/7/2013 5:25 PM Application 4,760 KB
Template.exe 12/8/2010 3:57 PM Application 4,104 KB
triangleUni801C.exe 6/17/2014 12:19 PM Application 6,413 KB
UPDATE_EX.TXT 7/25/2014 11:34 AM Text Document 2 KB
Relabel29.exe State: Shared Size: 4.64 MB Shared with: Sarah Mikolajczyk - 11199c; Pat Kerns - 11196c; All ...
Application Date modified: 8/7/2013 5:25 PM Date created: 8/7/2013 4:16 PM





Step 3

Use config.exe to access the Matrix designer. Look under Analysis type to determine the Analysis type used by Controlled Substance Analysis Matrix panel. Then click the “Link Test Type to Analysis Type” button. Select the Analysis type to see the selected panel fields. These field names will be needed to configure the NFLIS export.

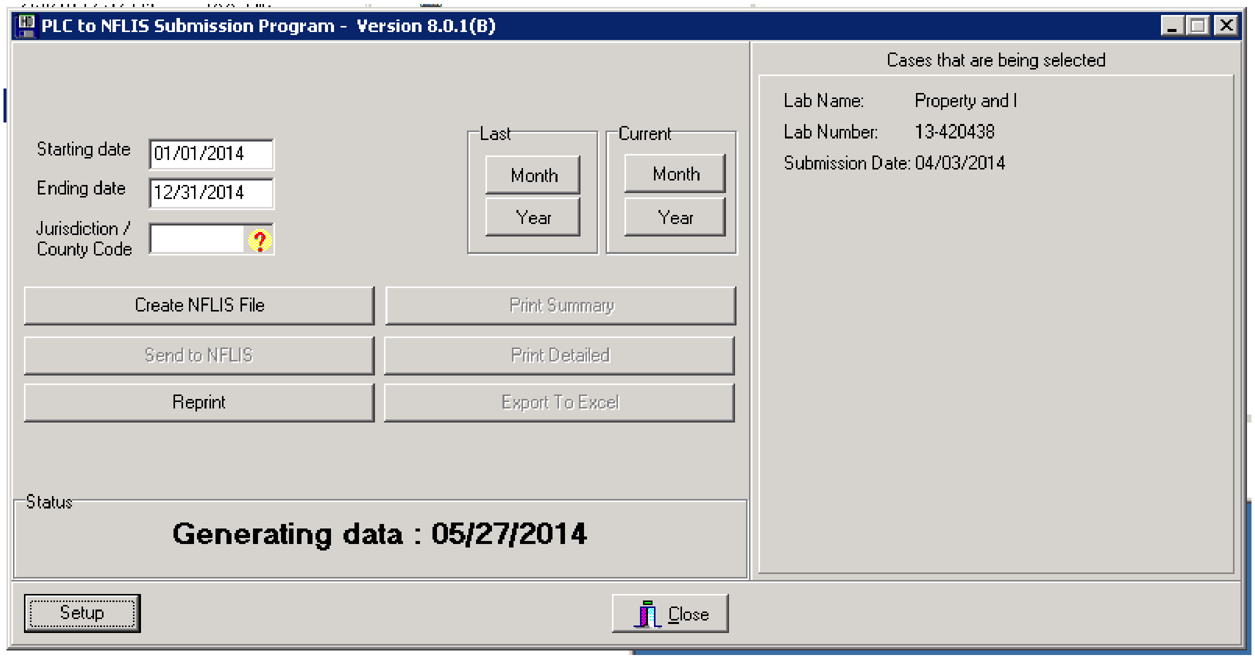


Step 4

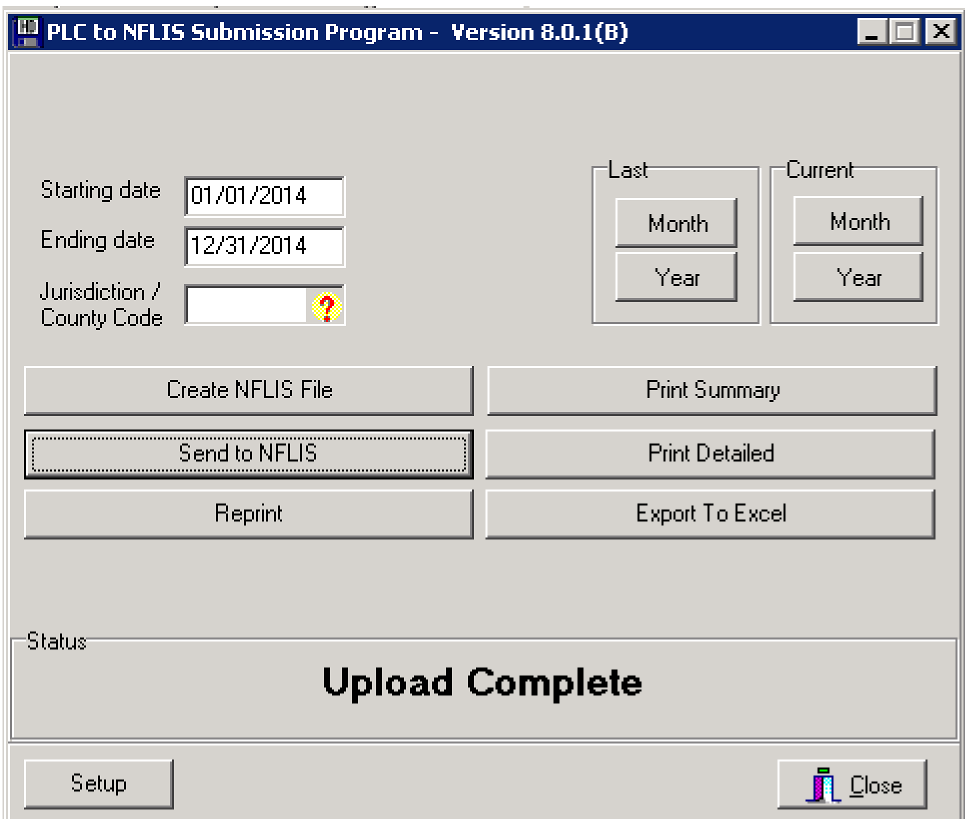
After launching the triangleUNI801c.exe program, click setup button and configure as shown above

SFTP password: f5heE8p%XGN

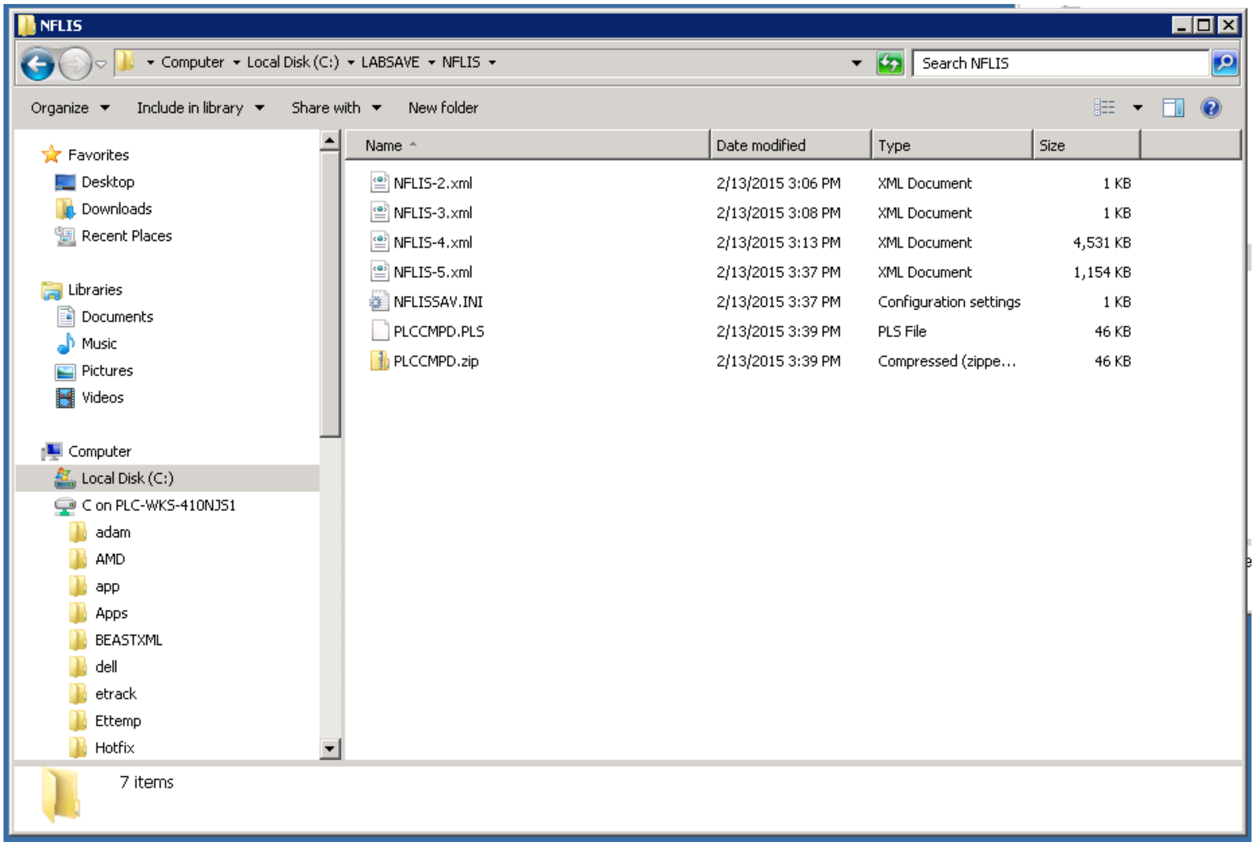
- For Attribute area you will need to select matrix field for the initial results. Then for the fields listed below that link the fields from the matrix panel that apply as shown in the lower right of the screen shoot above. Some labs will capture more or less fields depending on their configuration.



Step 5 Once configuration has been completed users will skip steps 1-4. They will launch triangleUNI801c.exe and enter a date range for submissions they want to send to NFLIS. They will then click “Create NFLIS File”.



Step 6 Once NFLIS file has been generated. The user will click “Send to NFLIS” button. User will receive message “Upload Complete” They may then close the application and repeat steps 4 and 5 next time they need to submit new date to NFLIS.


NFLIS
Computer ▸ Local Disk (C:) ▸ LABSAVE ▸ NFLIS
Search NFLIS
Organize
Include in library
Share with
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
Local Disk (C:)
C on PLC-WKS-410NJS1
adam
AMD
app
Apps
BEASTXML
dell
etrack
Ettemp
Hotfix
Name
Date modified
Type
Size
NFLIS-2.xml 2/13/2015 3:06 PM XML Document 1 KB
NFLIS-3.xml 2/13/2015 3:08 PM XML Document 1 KB
NFLIS-4.xml 2/13/2015 3:13 PM XML Document 4,531 KB
NFLIS-5.xml 2/13/2015 3:37 PM XML Document 1,154 KB
NFLISSAV.INI 2/13/2015 3:37 PM Configuration settings 1 KB
PLCCMPD.PLS 2/13/2015 3:39 PM PLS File 46 KB
PLCCMPD.zip 2/13/2015 3:39 PM Compressed (zippe… 46 KB
7 items

HARDWARE

This sections includes installation and setup instructions for system hardware:

- Barcode Printer Installation
- Barcode Scanner Installation
- Signature Pad Installation
- Topaz Setup

BARCODE PRINTER INSTALLATION

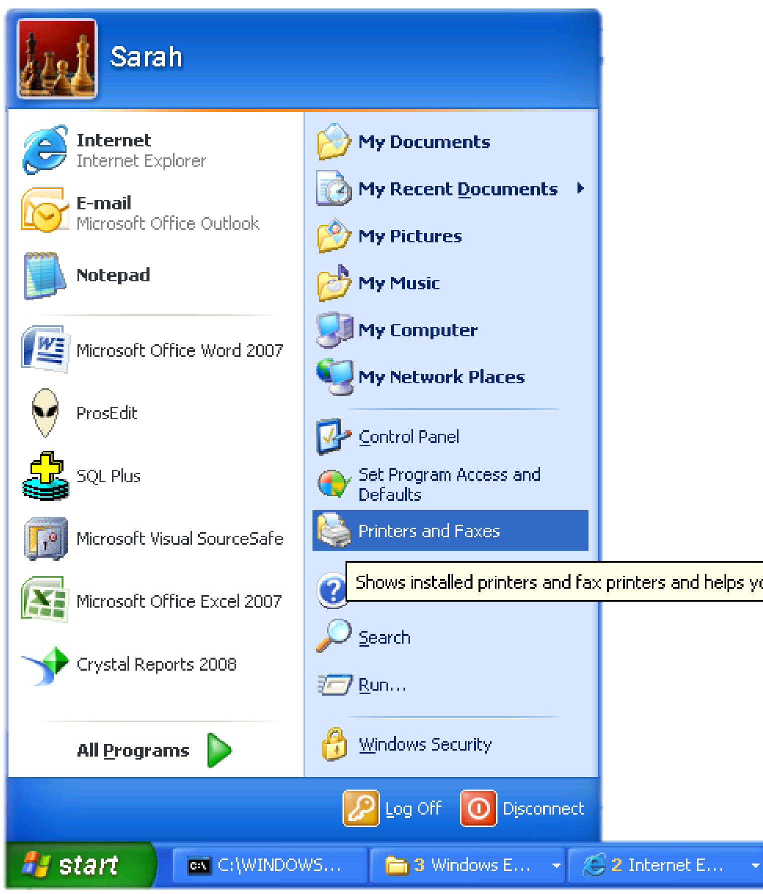
These are installation instructions for the TLP3842 barcode printer.

This printer requires the installation of the following driver:

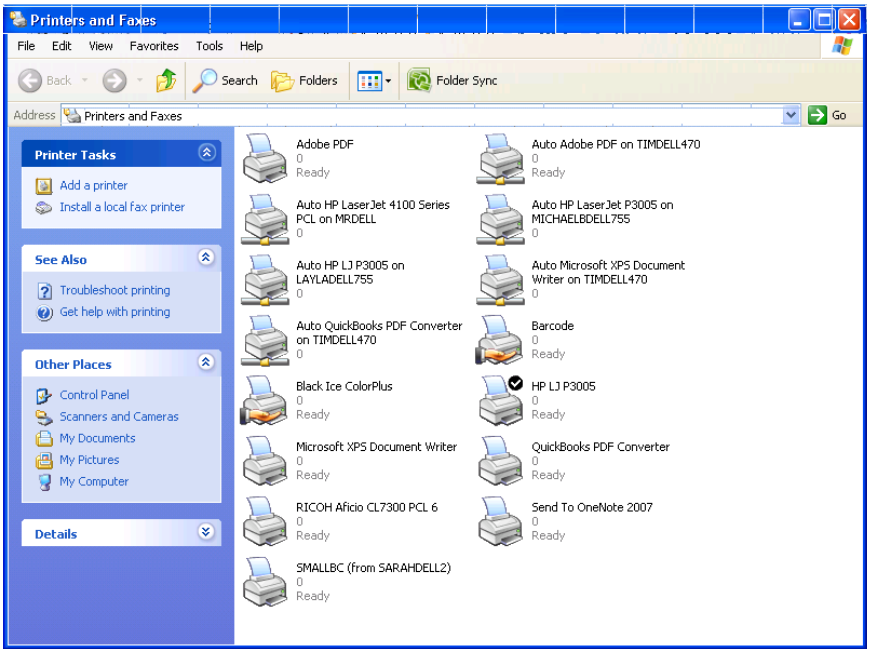
ZUD55725

Step 1: Plug the power cord into the back of the printer and into a power source. Plug a USB cable into the back of the printer and into a functional USB port on the computer.

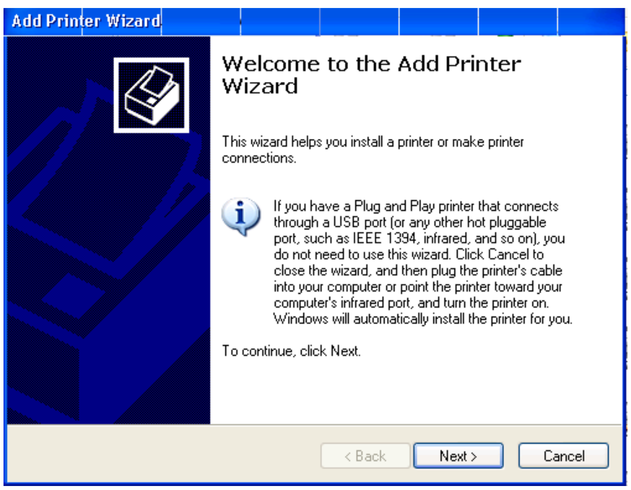
Step 2: Install the printer driver:



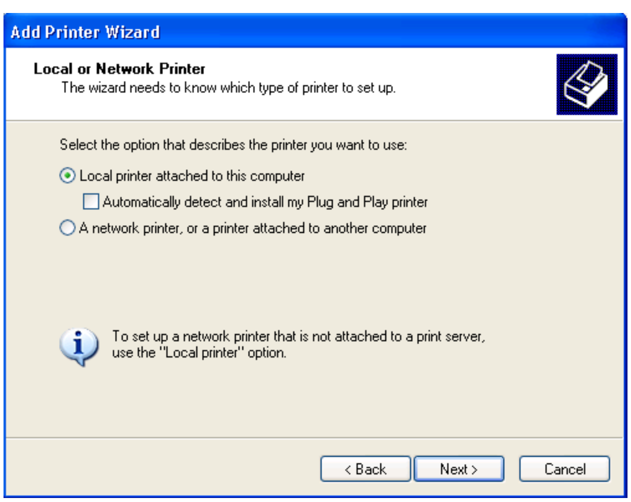
Click Add Printer



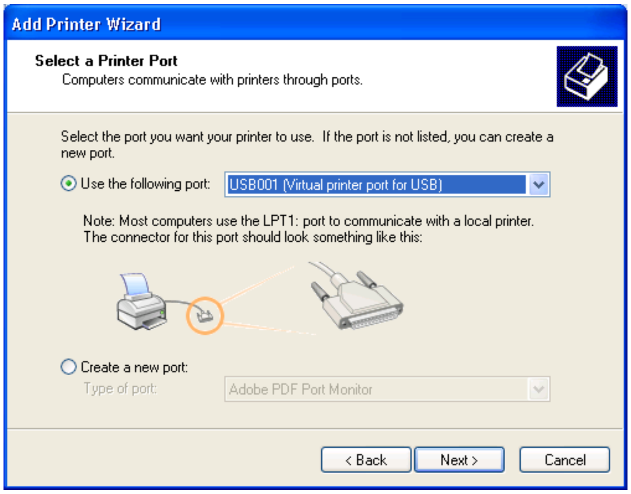
Click Next



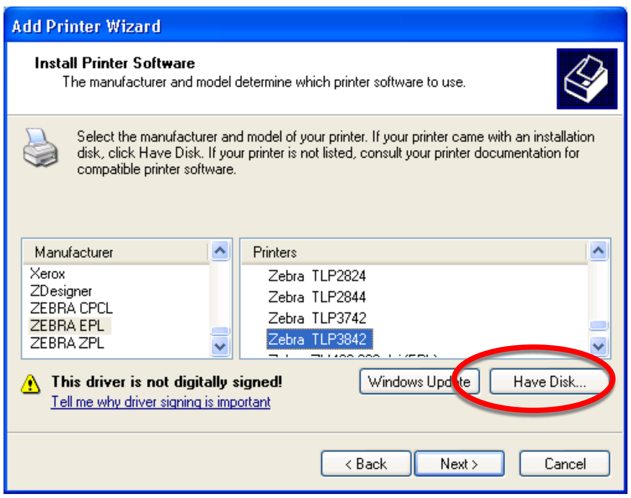
Click Next



Select the USB virtual printer port and click Next

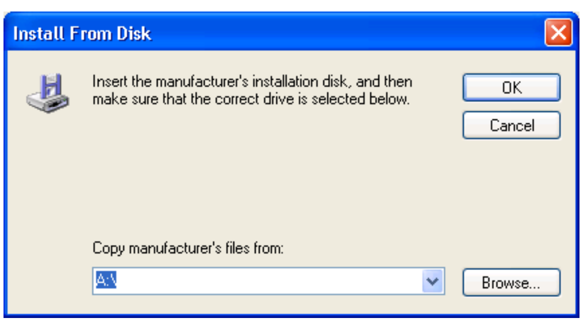


Select ZEBRA EPL and Zebra TLP3842 and click the <Have Disk> button

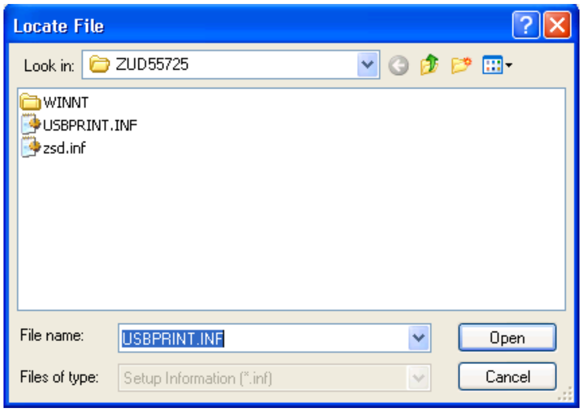


NOTE Depending on the drivers loaded on the computer, this screen, and the following several screens may vary.

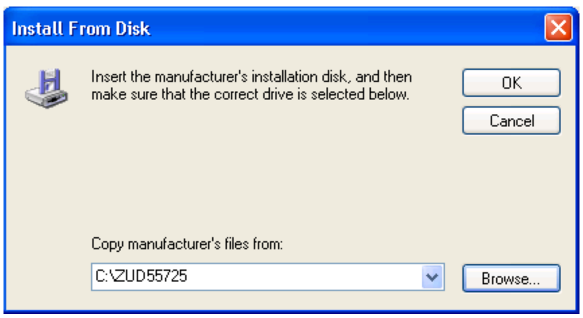
Click the <Browse> button to navigate to the driver files.



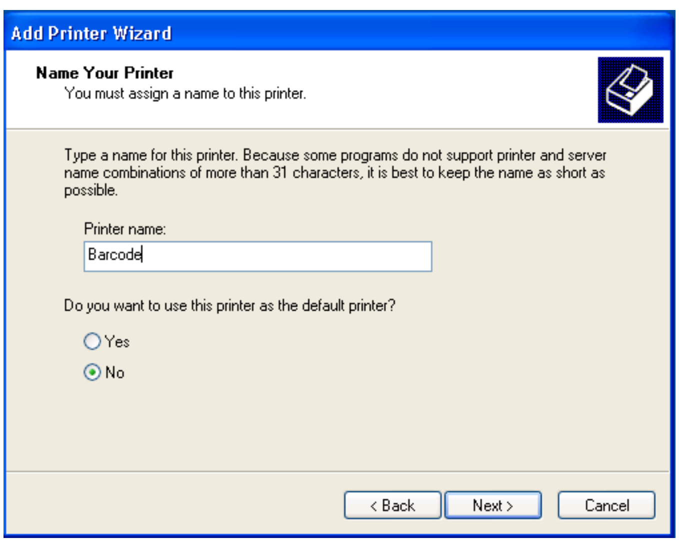
Click open



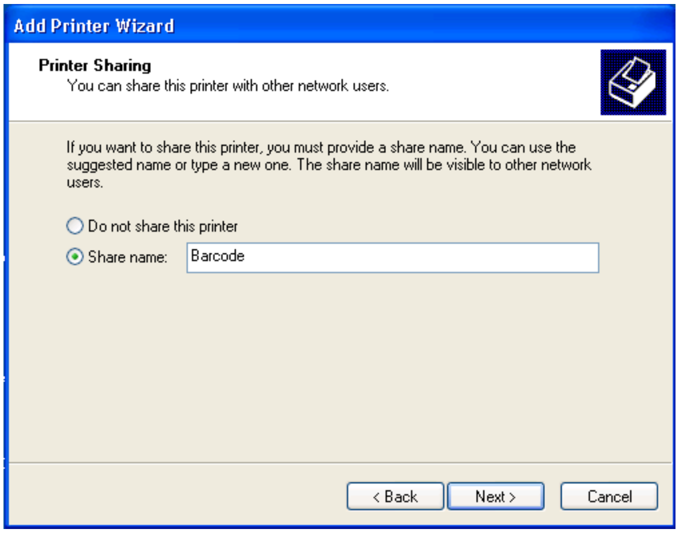
Click the <OK> button



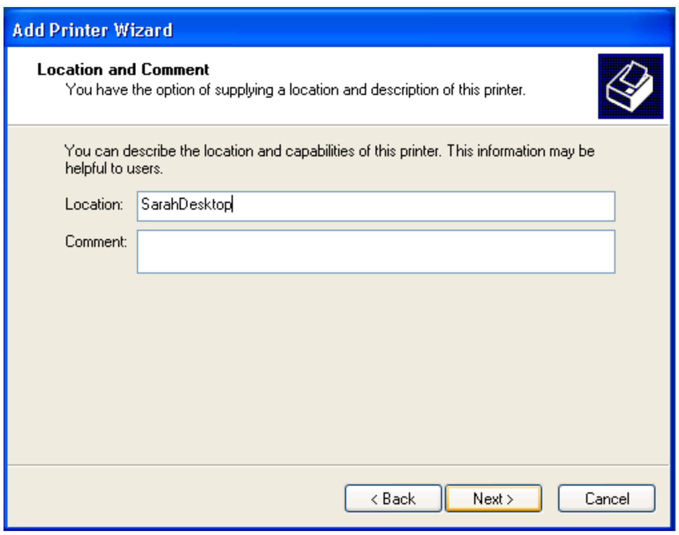
Enter the Printer Name and Click Next



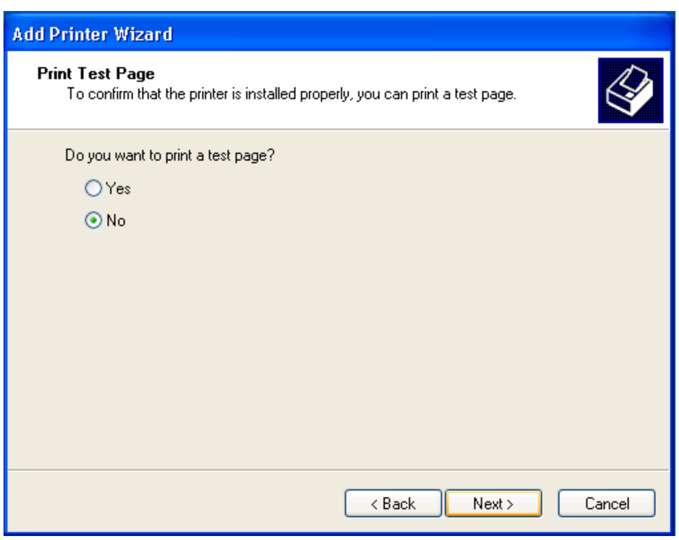
Click Next



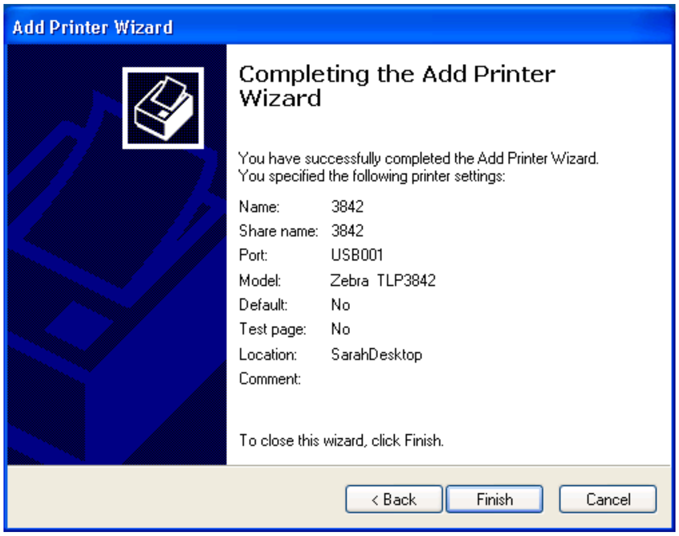
Click Next



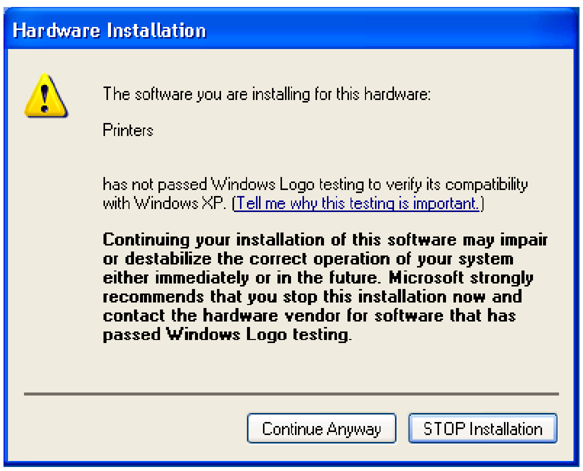
Click Next



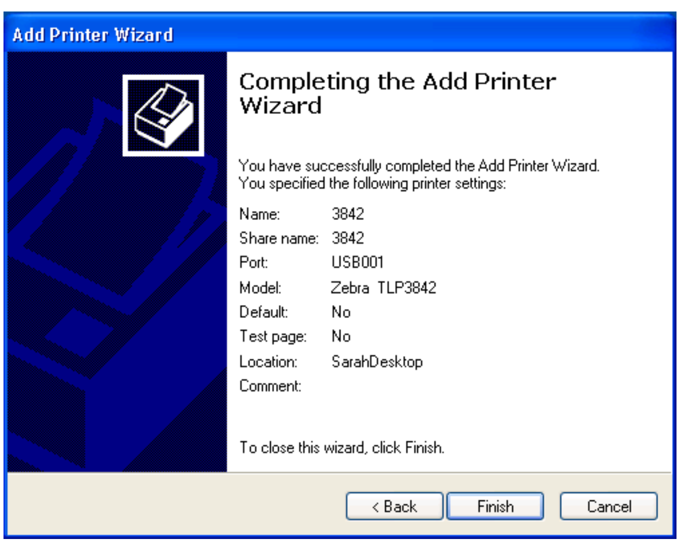
Click Finish



Click <Continue Anyway> button

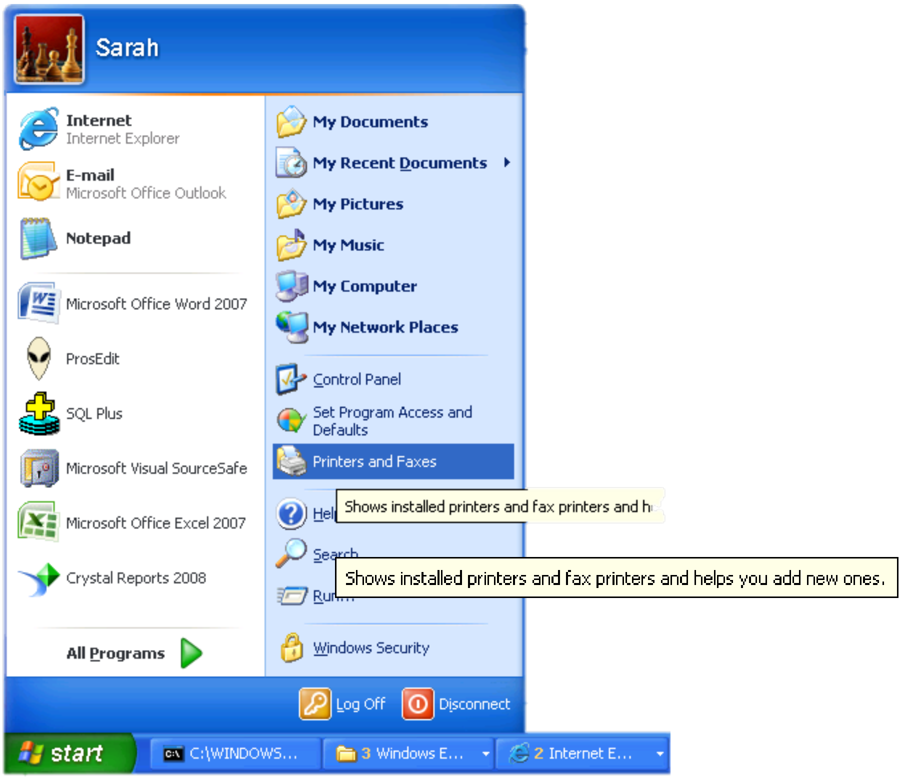


If the wizard doesn’t automatically close, click Finish

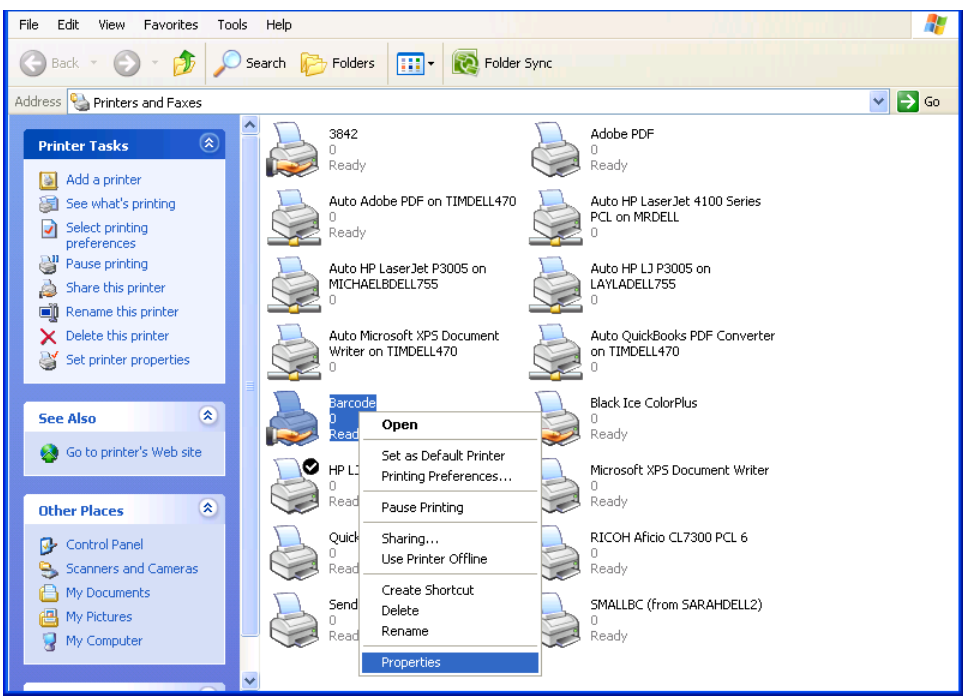


Step 3: Configure Printer Properties

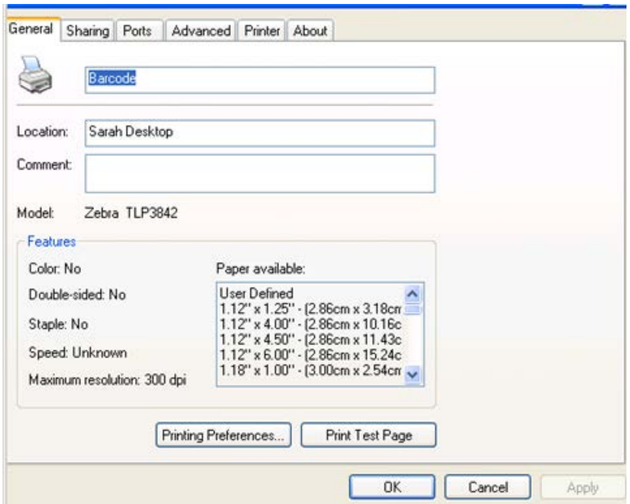
Go to Printers



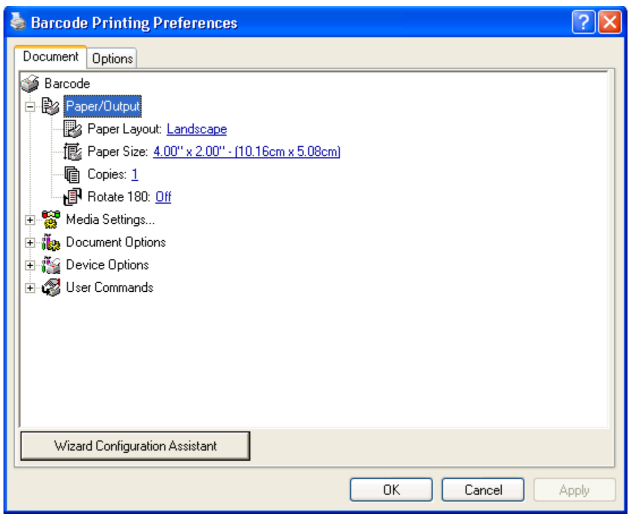
Right click on the Barcode printer and select properties



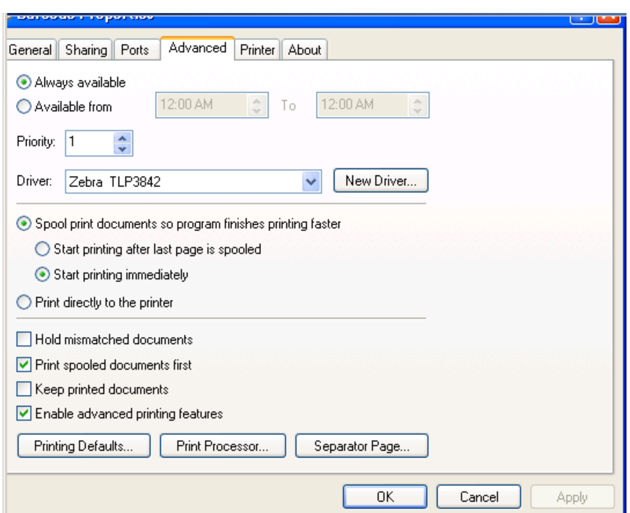
Click the <Printing Preferences> button



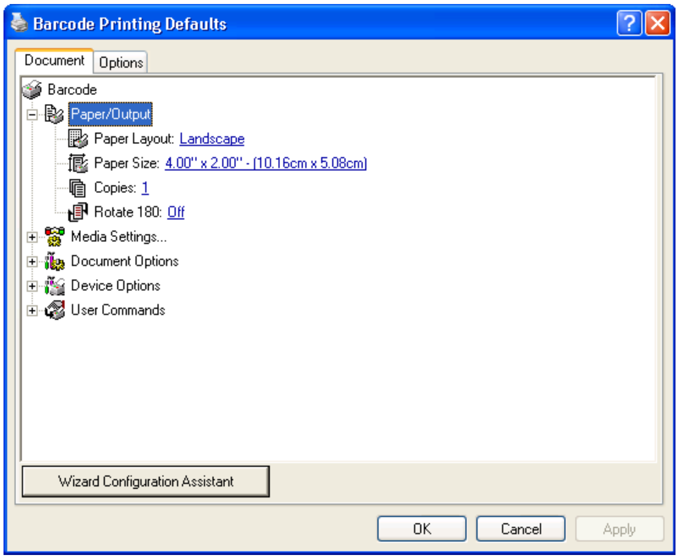
Under Paper/Output, set the layout to Landscape and paper size to 4.00” x 2.00.” Click OK.



On the advanced tab click the <Printing Defaults> button.

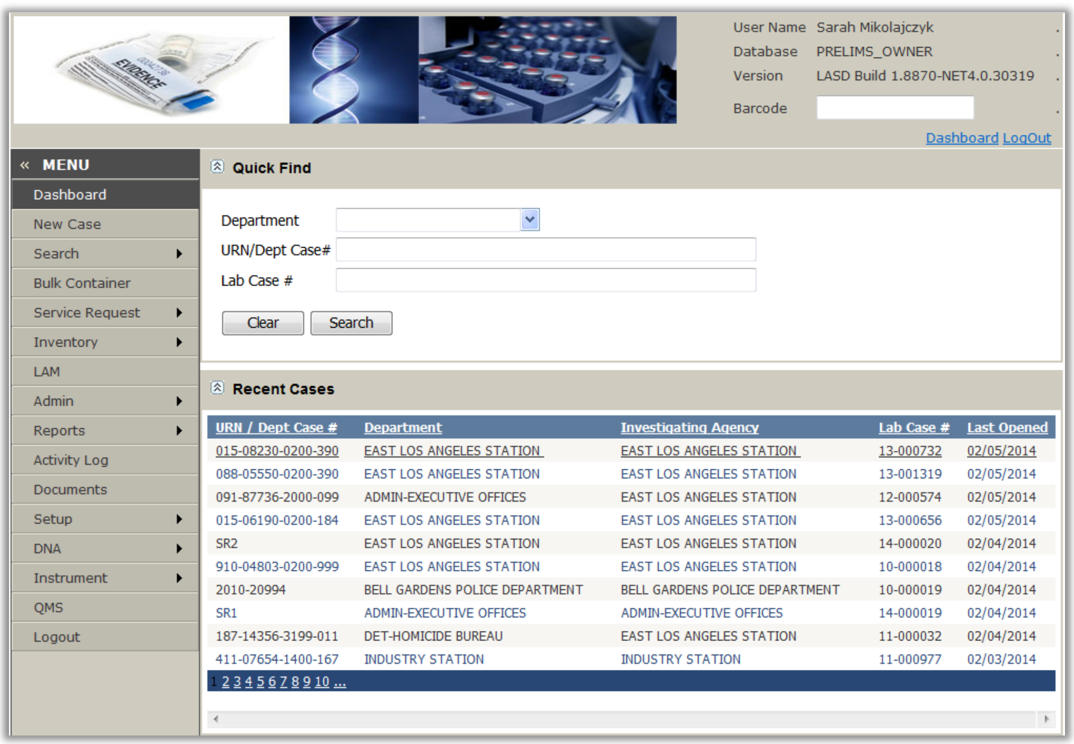


Under Paper Output set layout to Landscape and Size to 4.00” x 2.00”

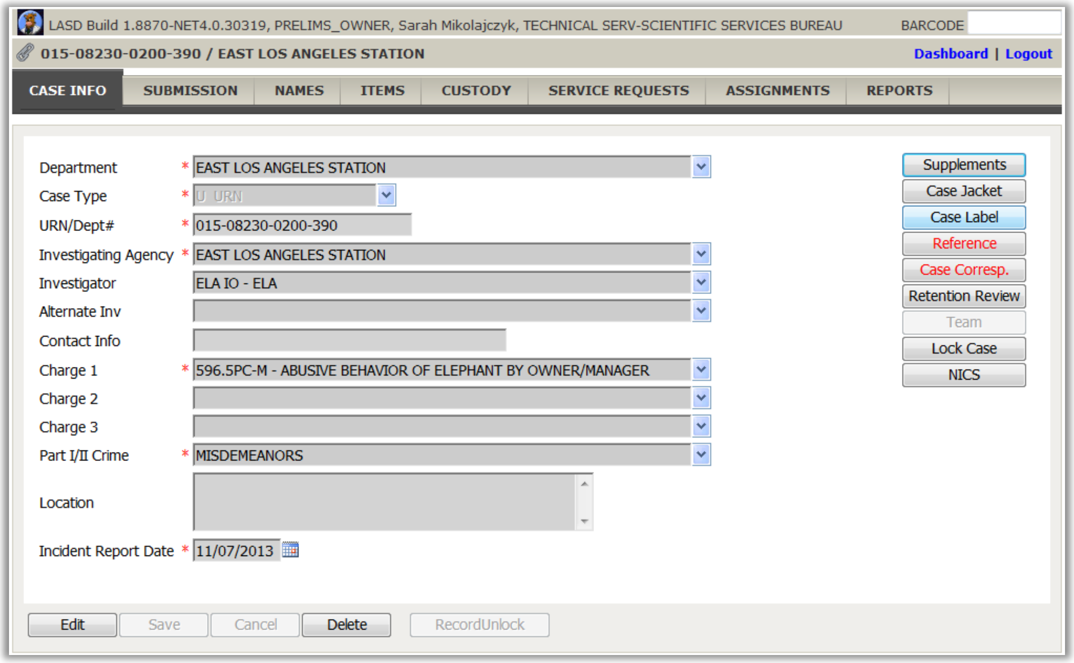


Step 4: Test

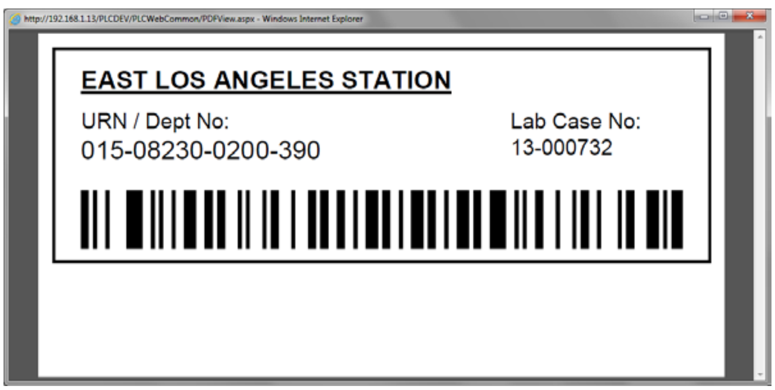
Log on to PLIMS. Select a case (click on a recent case)



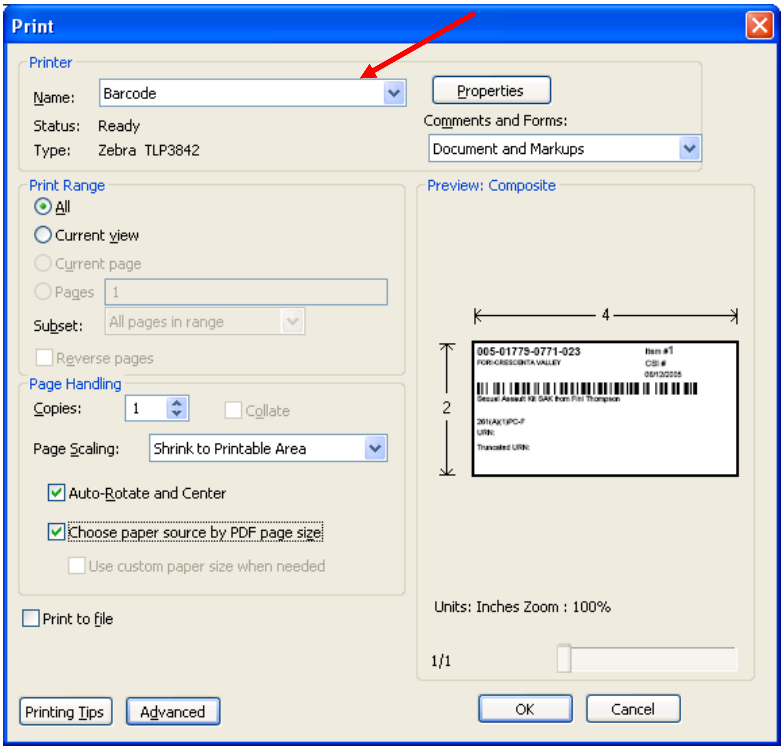
Click on the items tab



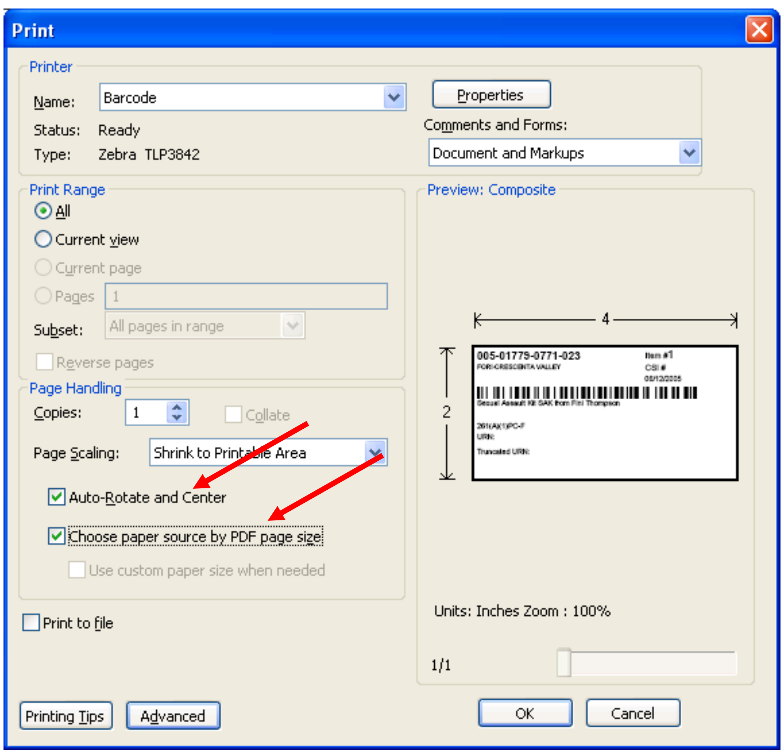
Select an item and click the label button. A label should print in the right orientation and size.



Select the name of the barcode printer that the label will be printing to.



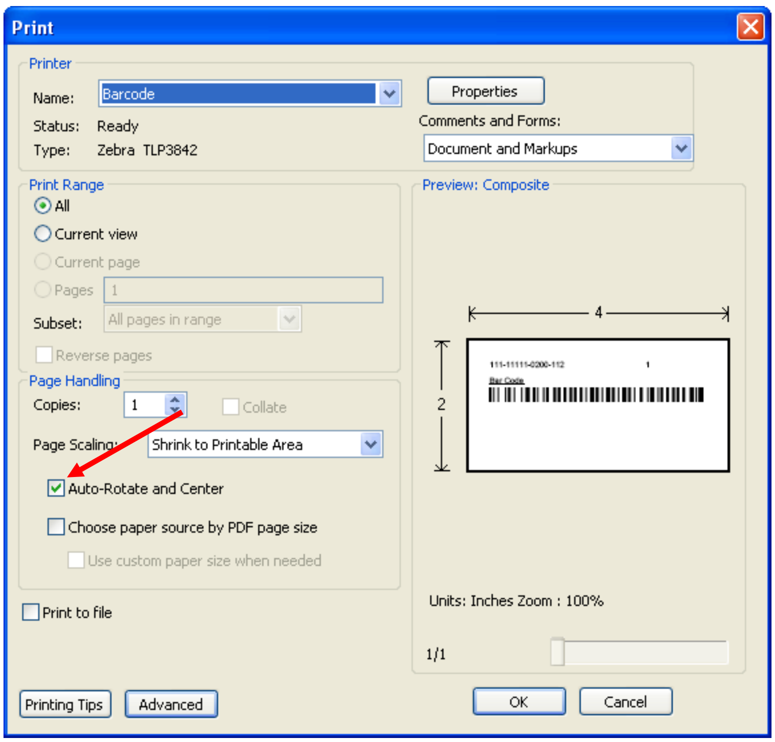
From the PDF print dialog under Page Handling, make sure the settings for "Auto-Rotate and Center" and "Choose paper source by PDF page size" are checked.



Press the OK button to print labels.

FAQs

- If the barcode printer does not print or stops printing and the light blinks red, check that the labels and ribbon are both loaded properly.
- If a workstation needs access to other printers, those printers will need to be installed locally on every machine so selection when the labels are printed.
- If the dimensions of the label are not setting as specified in the driver and crystal report OR even though these settings are correct, the orientation flips, check to make sure that Omniform is not set as the default printer.
- If the preview screen shows the margins correctly after choosing "Choose paper source by PDF page size" and the label prints out incorrectly, check to see if Omniform is set as the default printer. If it is, please make a valid document printer the default printer. Log out of PRELIMS and log back in and print the label again.
- If the barcode prints portrait instead of landscape and you have verified the properties are set correctly in both places in the driver then check the print screen to make sure the "Auto-Rotate and Center" setting is checked.



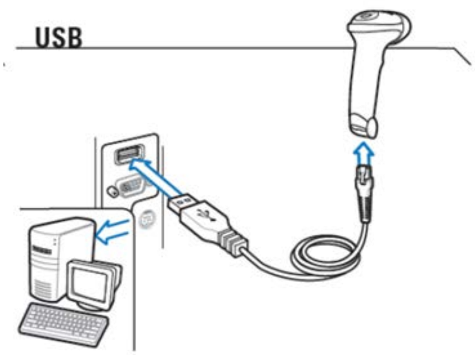
BARCODE SCANNER INSTALLATION

LS2208

These are instructions for the installation of the LS2208 USB barcode scanner. This requires **NO DRIVER** to be installed.

The PLIMS web application requires that all scanners be converted from their standard configuration to utilize a Keyboard wedge emulation and “Carriage Return + Line Feed” after every scan. To do this, all scanners regardless of manufacturer, have to be converted from their standard configuration. To accomplish this you must scan the appropriate barcodes to set the parameters.

Step 1: Plug USB end of scanner into a functional USB port on the computer.



Step 2: Scan the following barcodes

Set Defaults

SET DEFAULTS

Carriage Return/Line Feed

SCAN OPTIONS

<DATA><SUFFIX>

ENTER

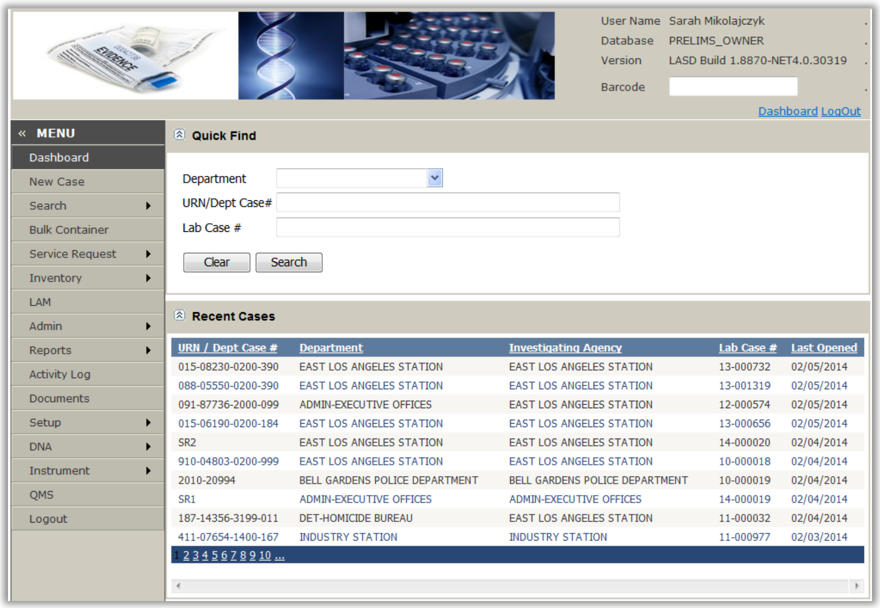
HID KEYBOARD EMULATION

Step 3: Test

Test functionality by Logging onto PLIMS website:

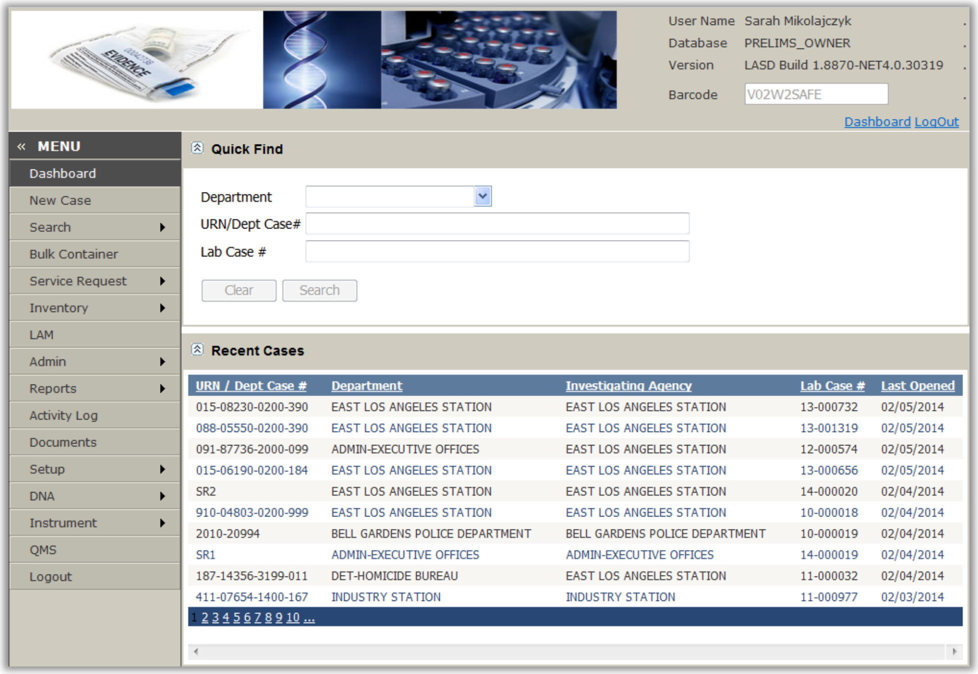
Create a label to scan if you do not already have one. You can do this by selecting a case and then click the “Case Label” button.

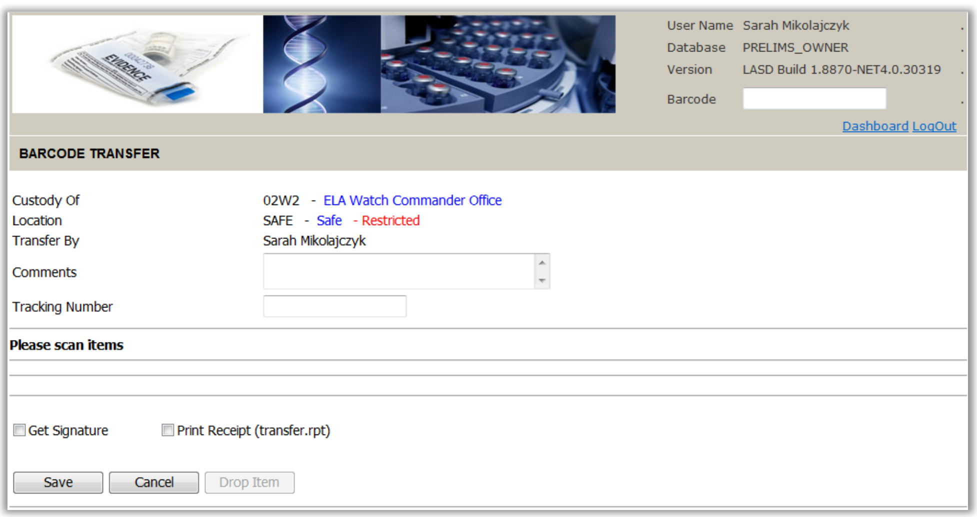
Click the “Case Label” Button.



Now scan the barcode

You should see the barcode scan into the barcode field and it should process automatically, navigating you to the process screen, displaying the appropriate location:





FAQs

- If the barcode stops scanning during the install, unplug and plug USB end back into computer. Repeat Step 3.
- If the barcode scans into the field but it does not automatically process, you need to rescan the carriage return barcodes.
- If the barcode scans and behaves other than expected it is possible that the scanner has not been converted to keyboard wedge. Repeat Step 3.

SIGNATURE PAD INSTALLATION

These are instructions for the installation of the ePad-ink (V9805) USB signature pad.

The following is required for installation:

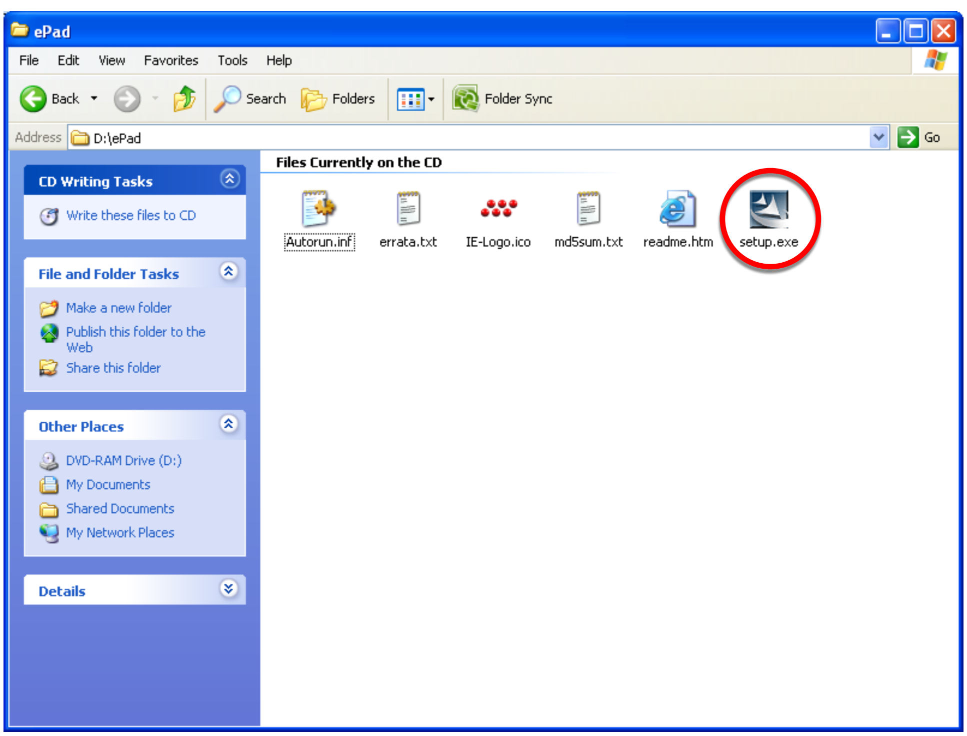
ePad-ink (V9805)

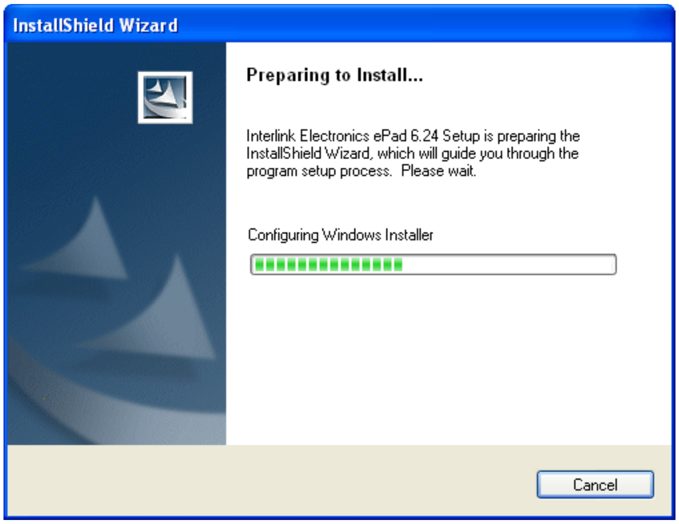
- ePad-ink (V9805) signature pad
- Driver installation disk
- esW25com.ocx
- esutil.dll

Step 1: Install the driver

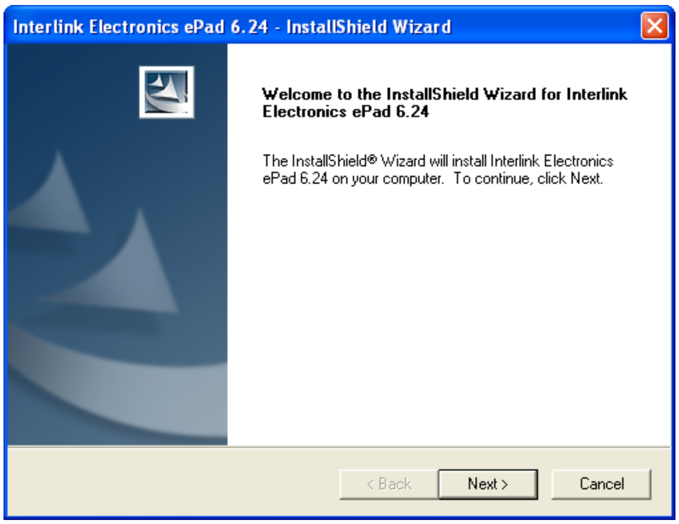
Place the disk in the disk drive and select Install ePad Drivers.

If it does not run automatically, open the epad folder and select setup.exe.

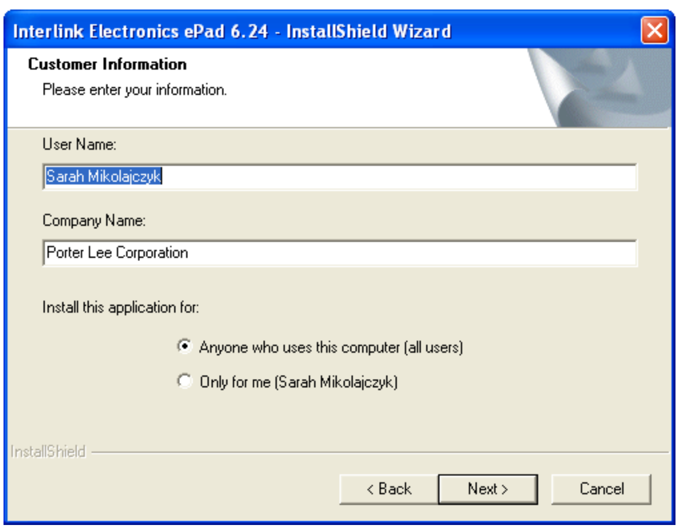




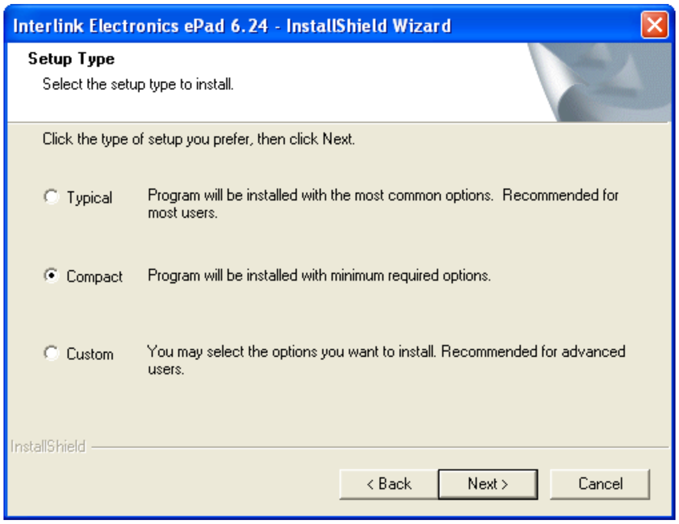
Click Next



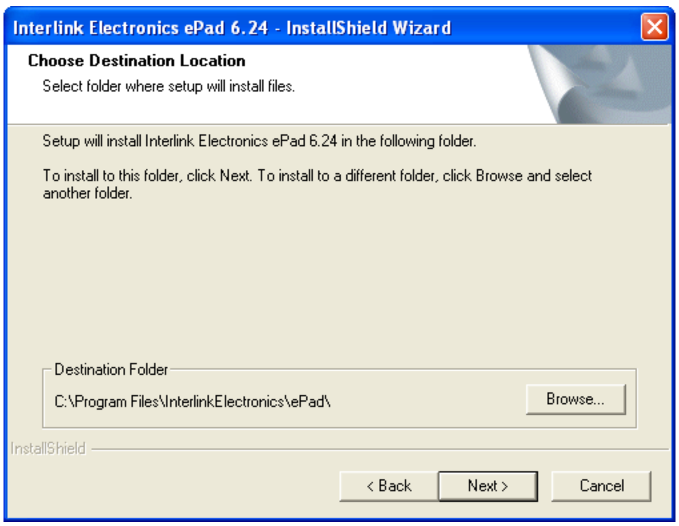
Click Next



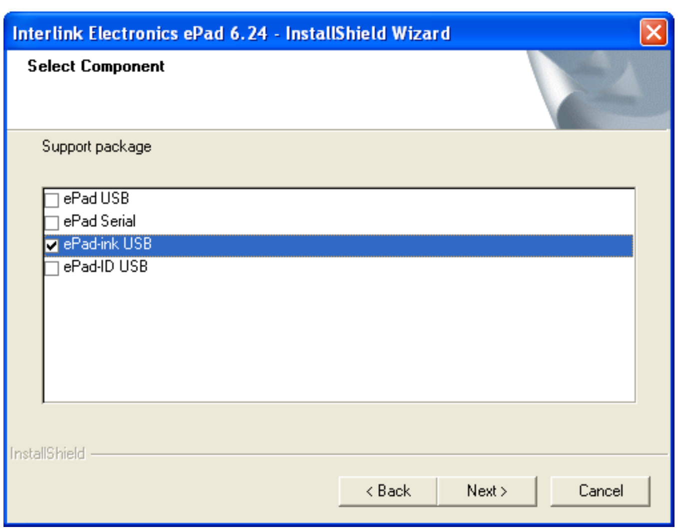
Click Next



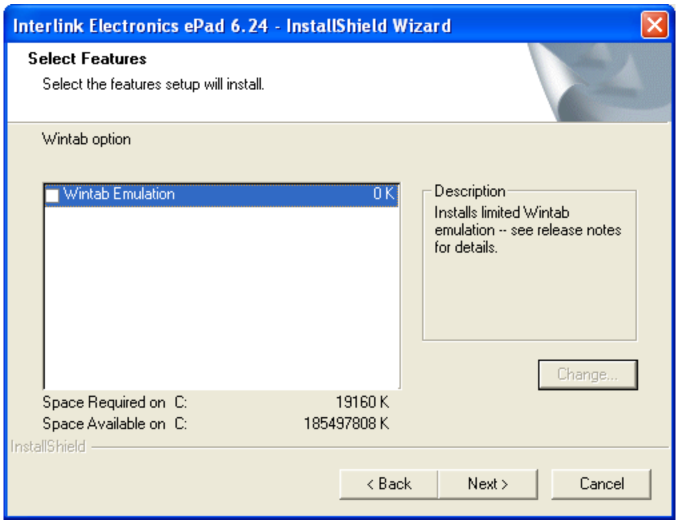
Click Next



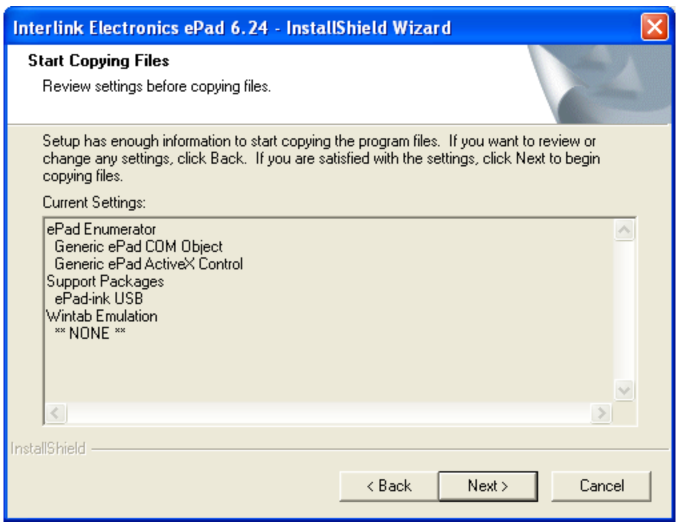
Select ePad-ink USB and Click Next

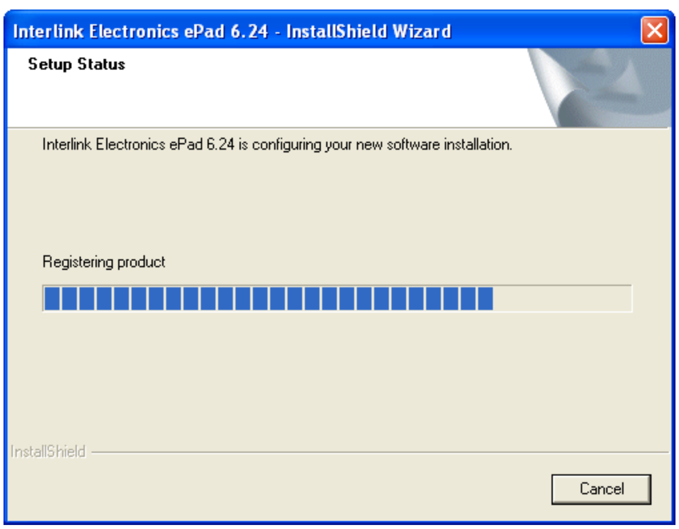


Click Next

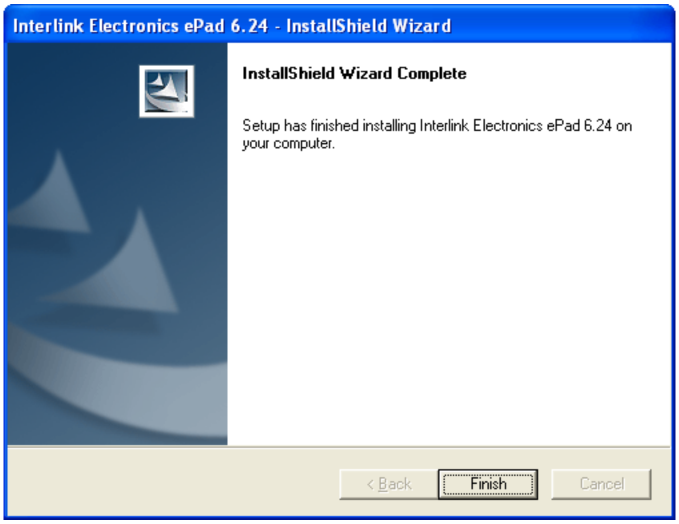


Click Next





Click Finish

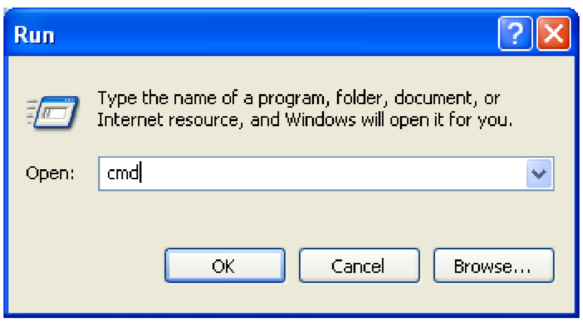


Step 2: Plug the signature pad into an operable USB port on the computer. The light on the screen may flash and the computer will recognize that it has been attached.

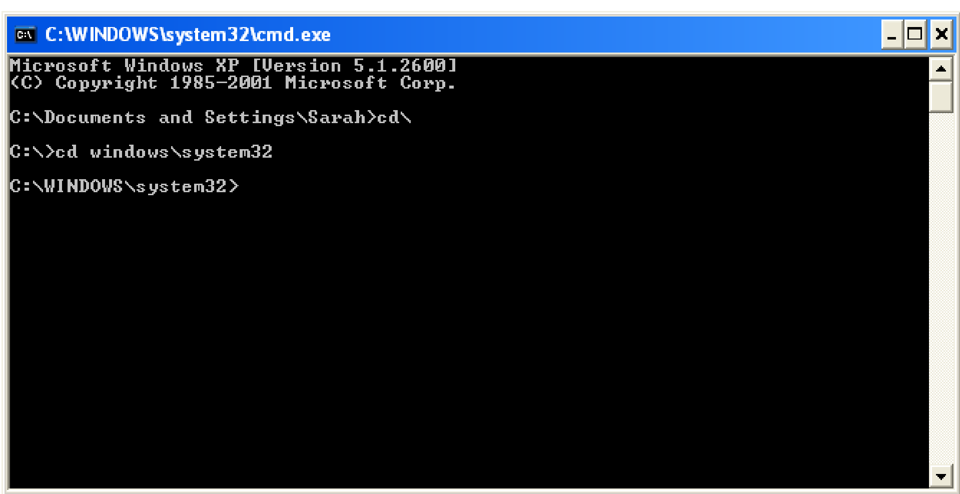
Step 3: Put the following files in the c:\windows\system32 directory

- esW25com.ocx
- esutil.dll

Register the esW25com.ocx by opening a command prompt

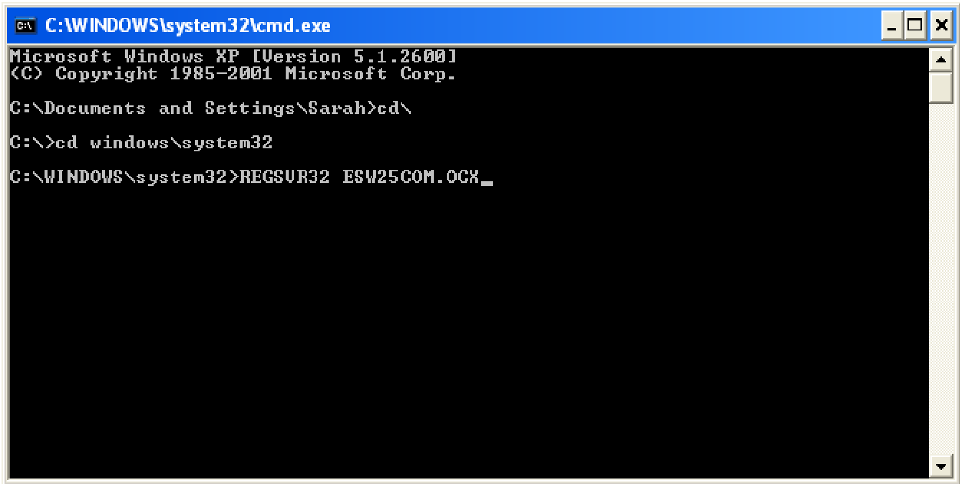


Click ok



Navigate to the c:\windows\system32 directory

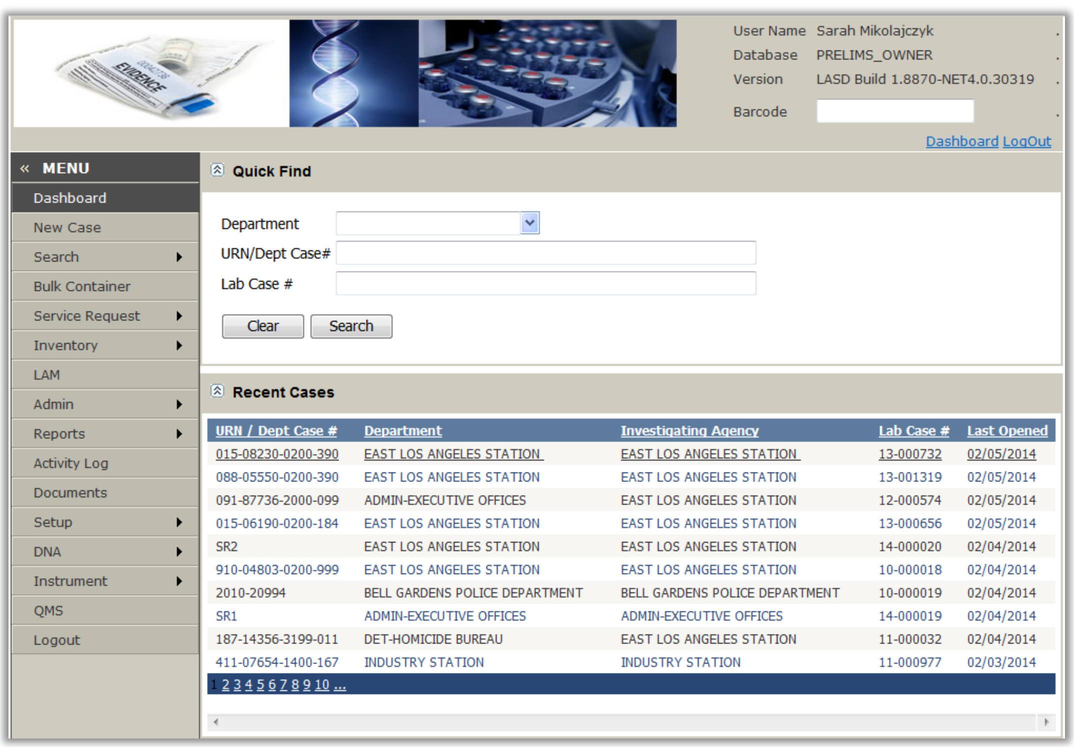
Type: **Regsvr32 esw25com.ocx**



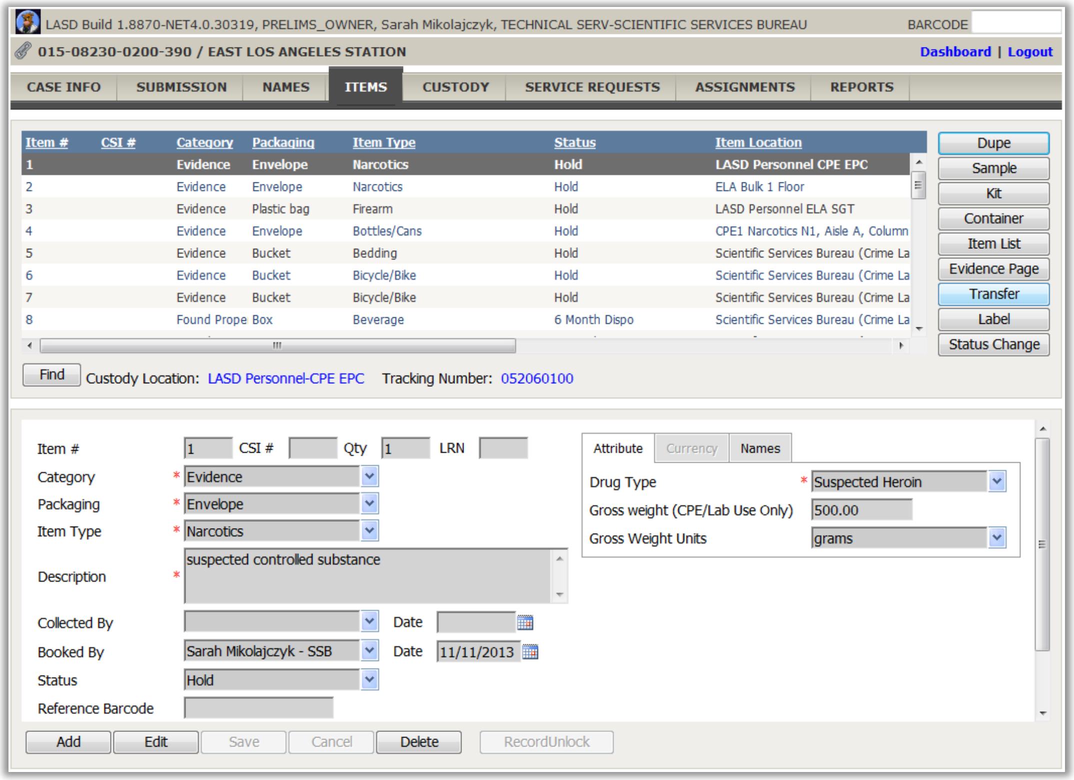
Click Enter and you should receive the following message:

Step 4: Test

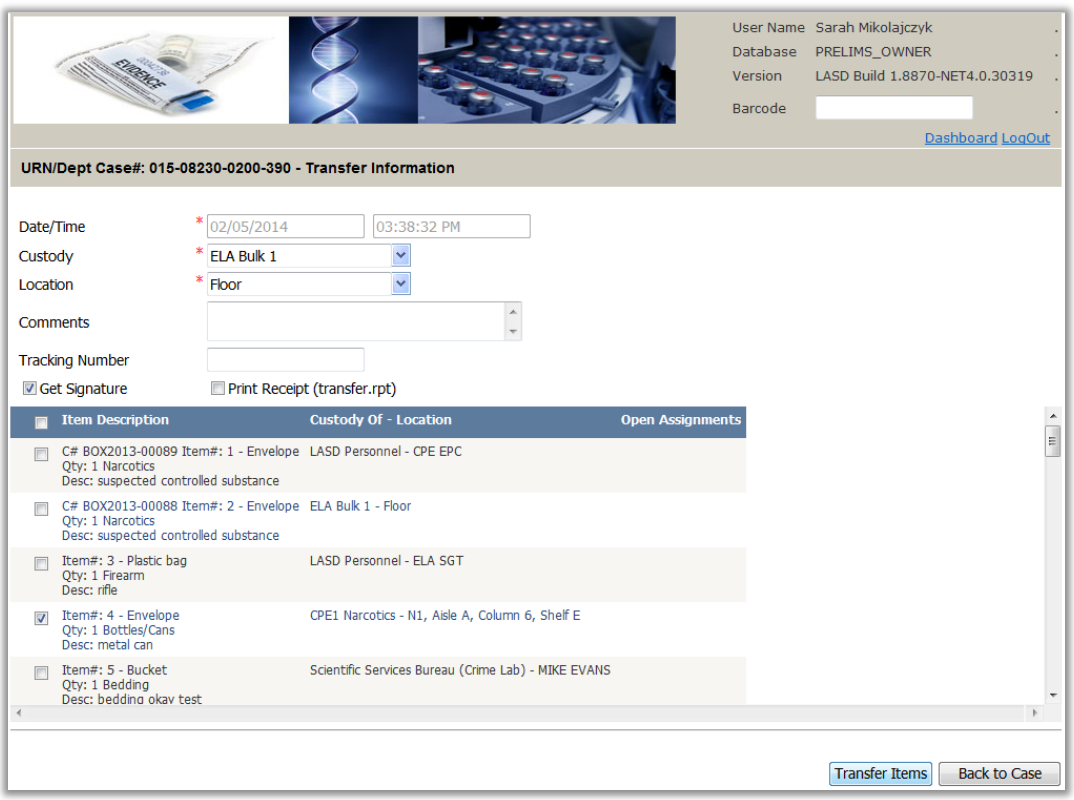
Log on to PLIMS. Select a case (click on a recent case)



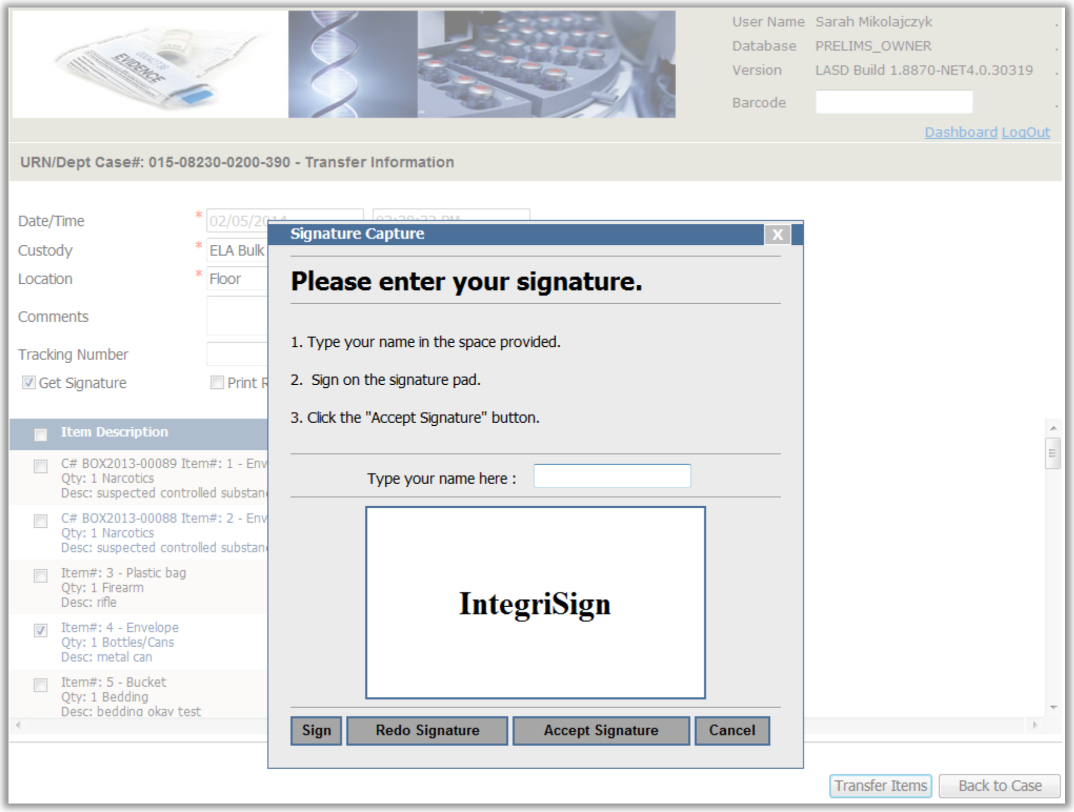
Click on the items tab. Select an item and click the transfer button.



Enter the custody, location, check the Get Signature Box and select at least one item by checking the box. Click the Transfer Items button. If it requests a password, type it in and then click the Transfer Items button again.

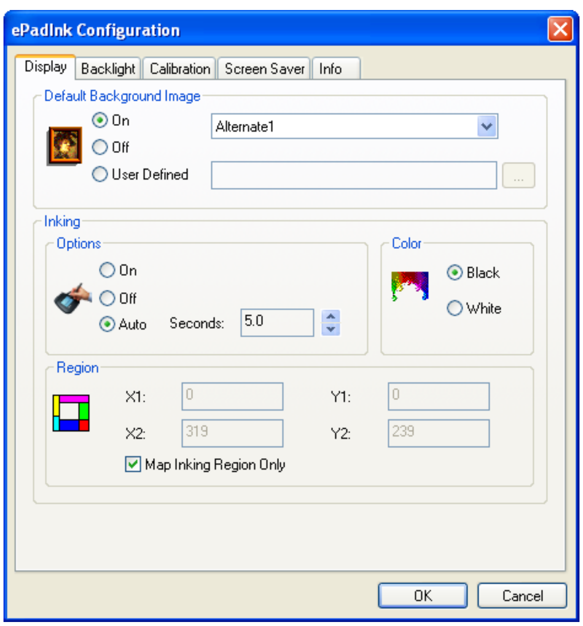


The following screen will appear:

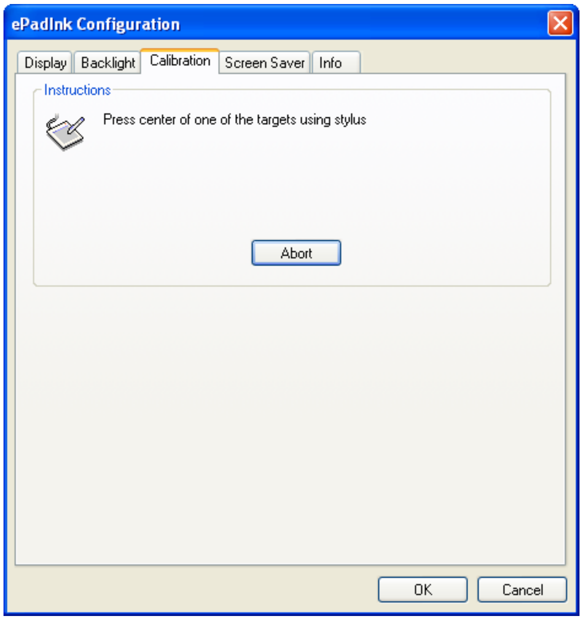


Type in your name and sign

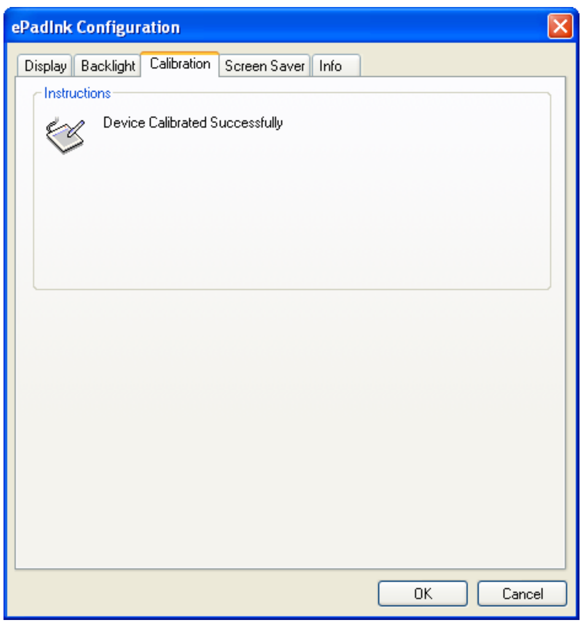
You may see the following the first time:



Click on the Calibration tab and click ok



Tap on the boxes on the pad with the stylus. They will both disappear once you have tapped them. Click Ok.



Click Ok. You will see that a signature screen appears on the epad. Type in your name on the web page and sign. Click Accept Signature

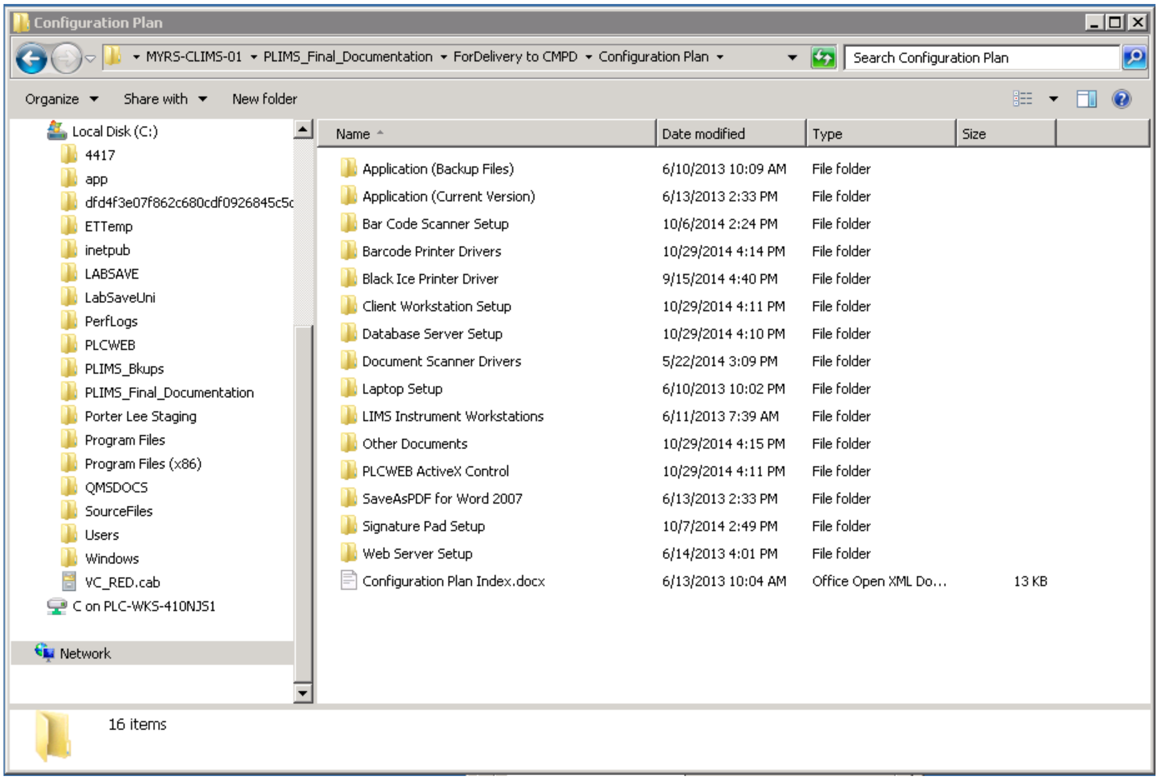
FAQs

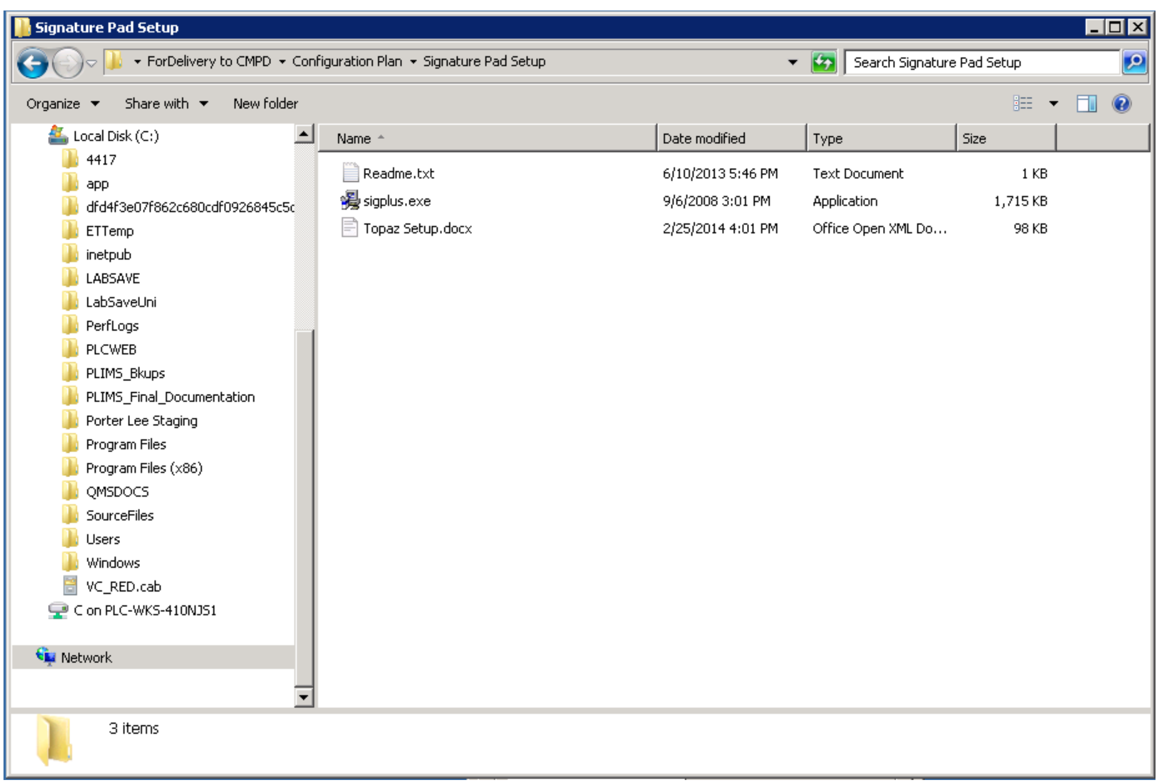
- If the computer is just not recognizing the epad try another USB port and completely uninstall, reinstall and re-register the OCX.

TOPAZ SETUP

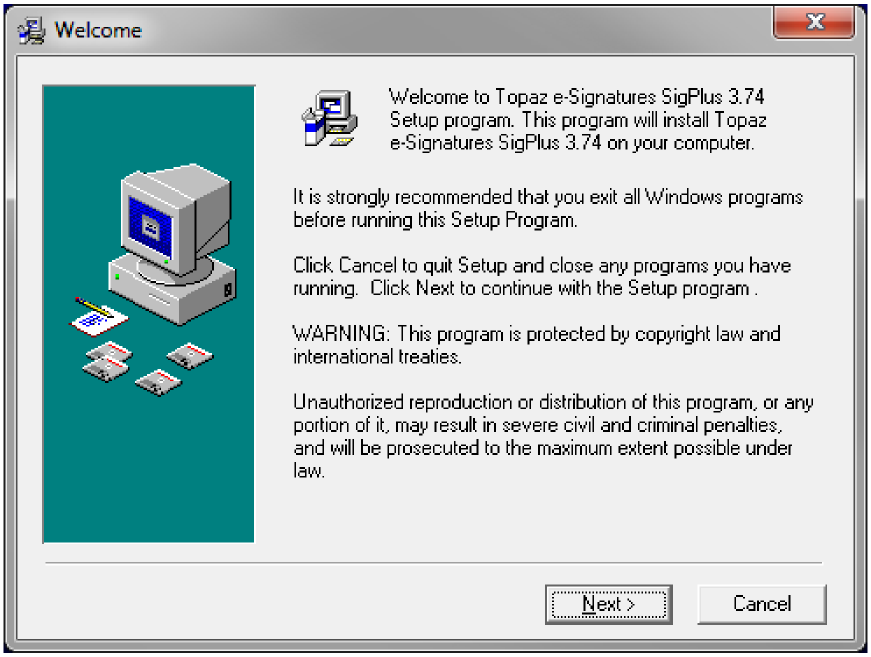
Run Sigplus.exe. The application can be found on server 10.66.33.31 in PLIMS_Final_Documentation\ForDelivery to CMPD\Configuration Plan\Signature Pad Setup.

NOTE If the signature pad is already plugged in to the USB port, unplug it before running Sigplus.exe.

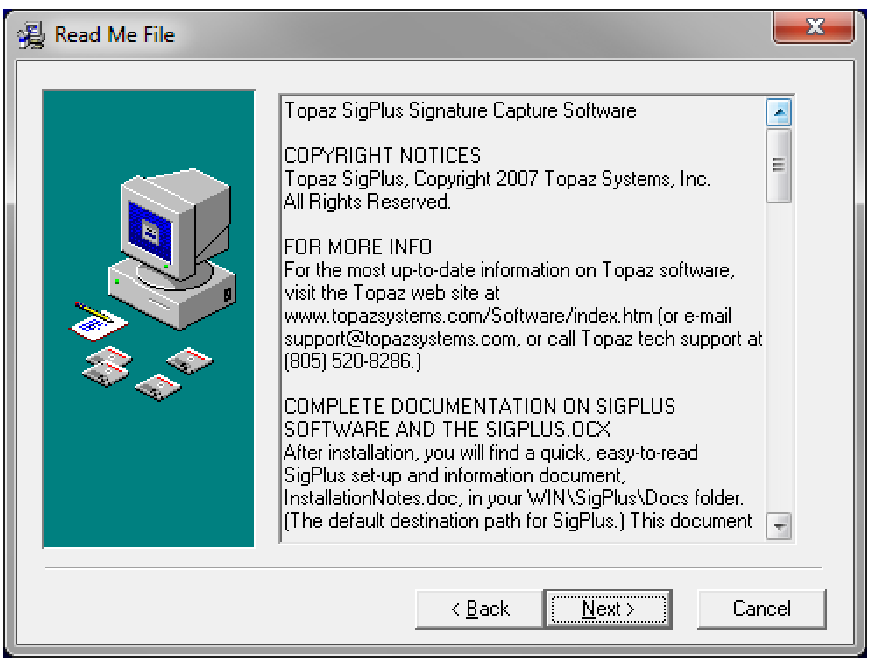




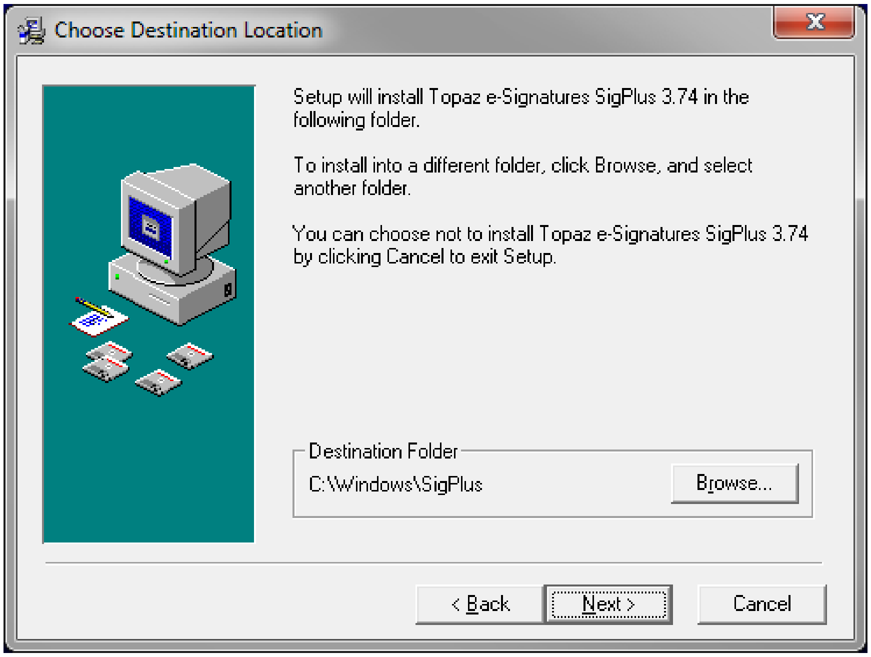
Click **Next.**



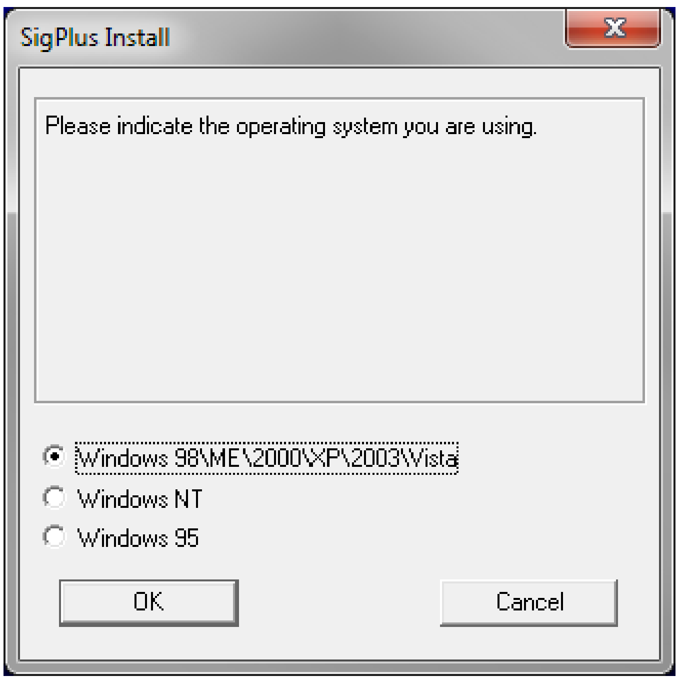
Click **Next.**



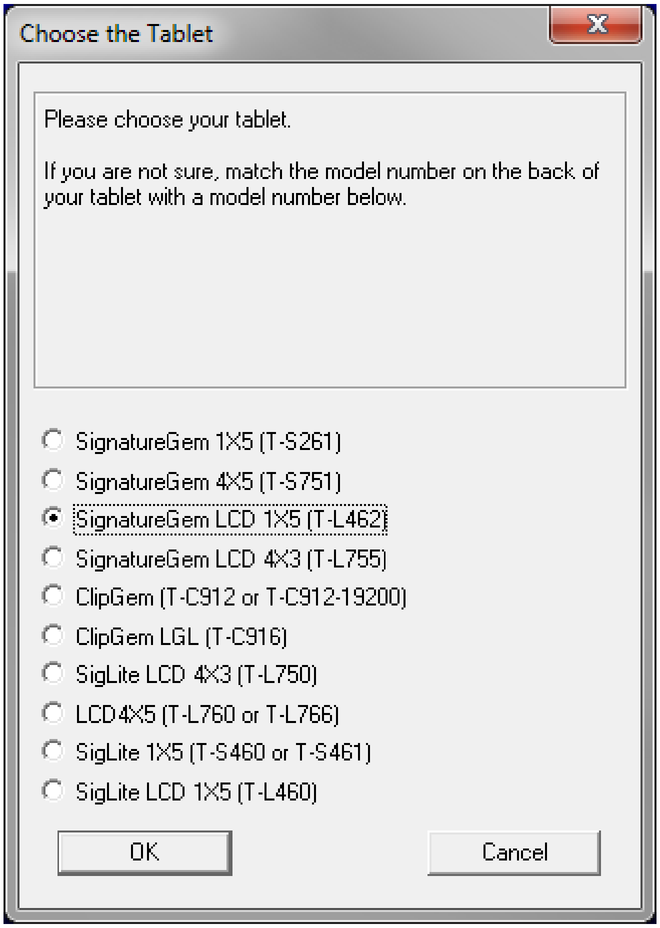
Click **Next.**



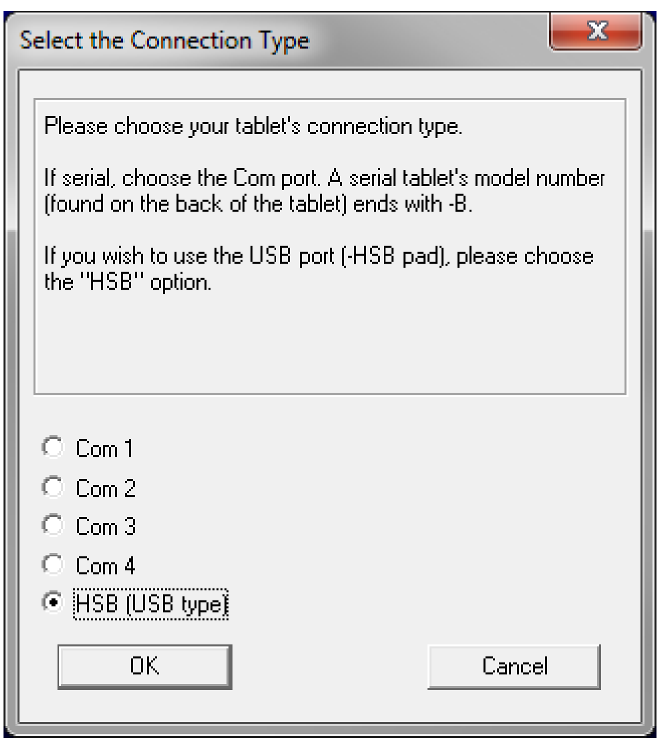
Select your version of Windows and click **OK.**



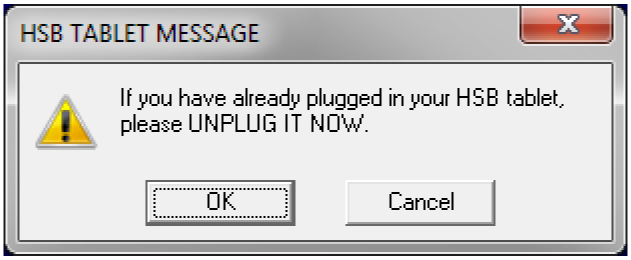
Select the model of your tablet and click **OK.**



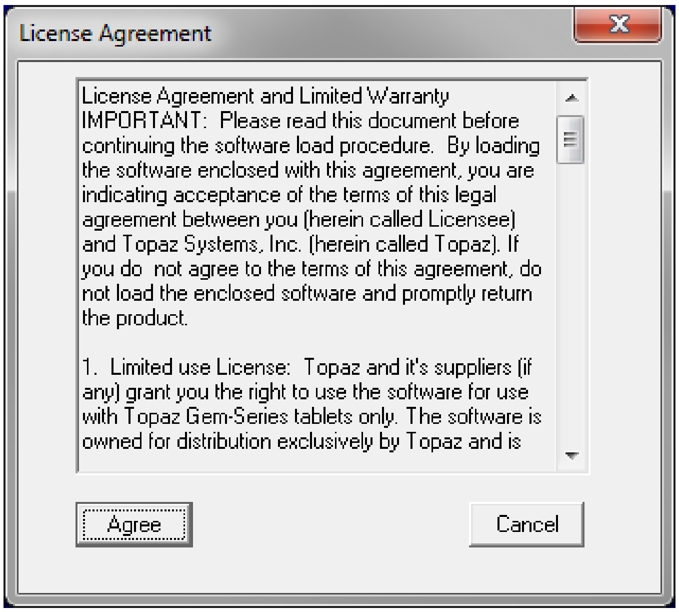
Select **HSB (USB type)** and click **OK.**



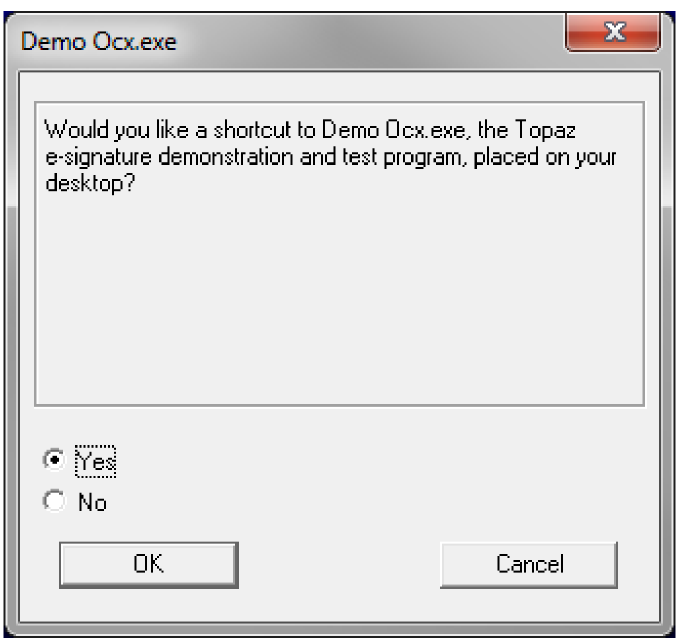
If the signature pad is already plugged in to the workstation, unplug it and click **OK.**



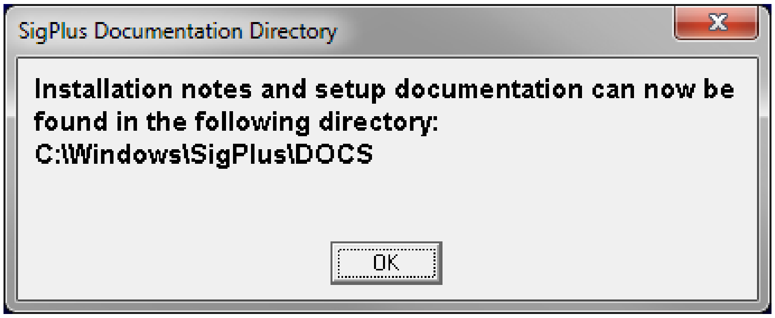
Click **Agree.**



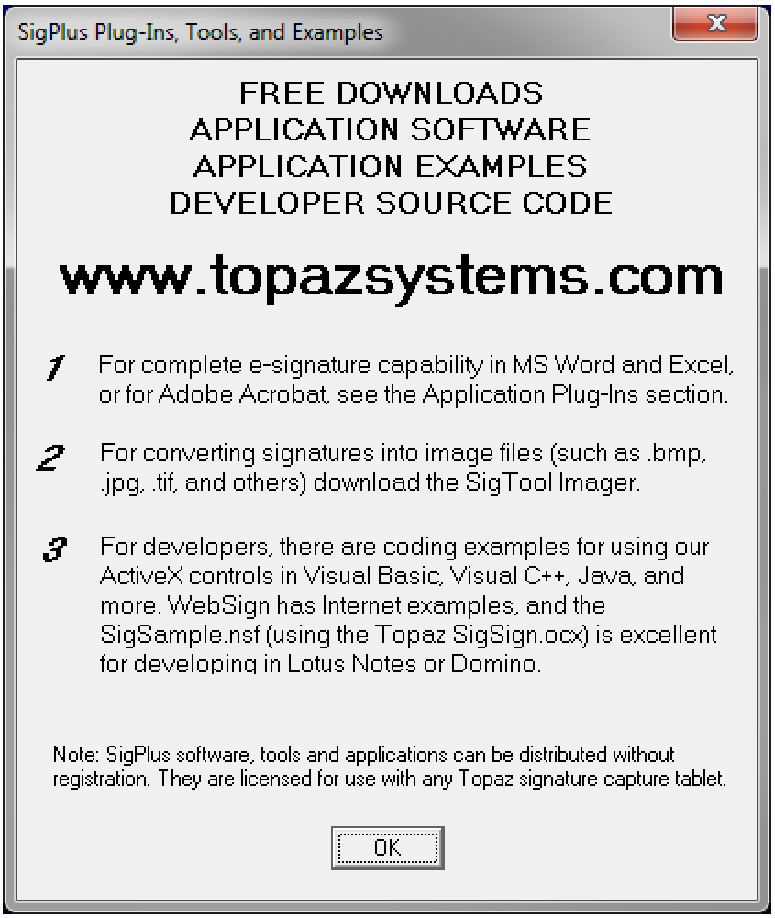
Click **OK.**



Click **OK**.

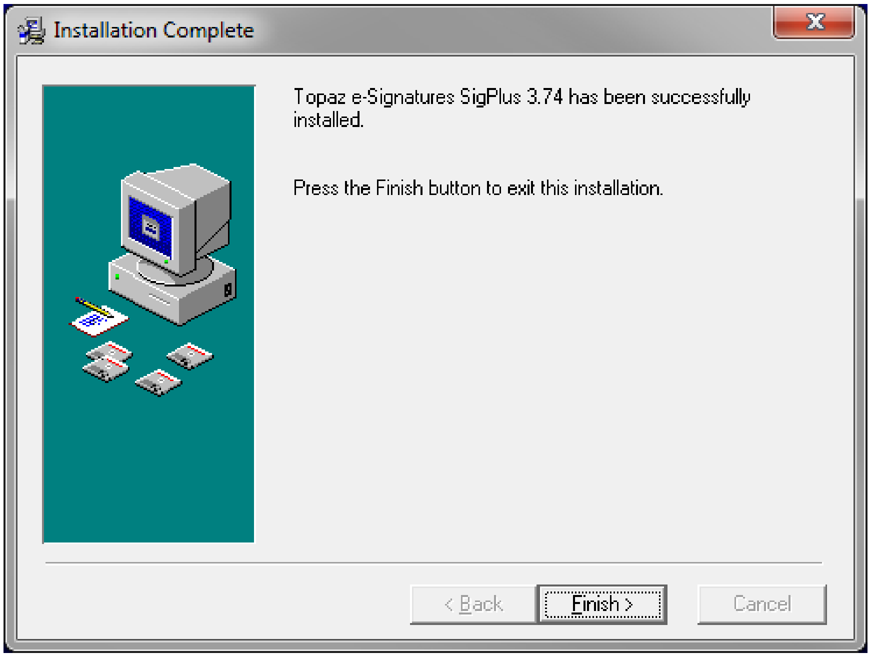


Click **OK.**



Click **OK.**

Click **Finish**. Then plug the tablet into the USB port. The drivers should load automatically.



SCANNER MONITOR

This section explains how to configure and use the scan monitor feature. The scan monitor can be used with any document scanner and provides for support of vendor programmable scanners/scanner macros that are only available outside of the PLIMS application.

UPDATING TV_LABCTRL AND TV_USERPREFS

In order to enable the scanner monitor feature, you need to run the following query:

```
UPDATE TV_LABCTRL4
SET USES_SCANNER_MONITOR = 'T'
```

The scanner monitor path will be set to C:\LabSave\SCANNERMONITOR by default. You can set a different default path by running the following query:

```
UPDATE TV_LABCTRL4
SET SCANNER_MONITOR_PATH = 'Enter your path here'
```

The scanner monitor path set in the LIMS is saved for individual users in TV_USERPREFS. You may need to run the following query to increase the length of the PREFERENCE_VALUE field:

```
ALTER TABLE TV_USERPREFS
ALTER COLUMN PREFERENCE_VALUE VARCHAR(250)
```

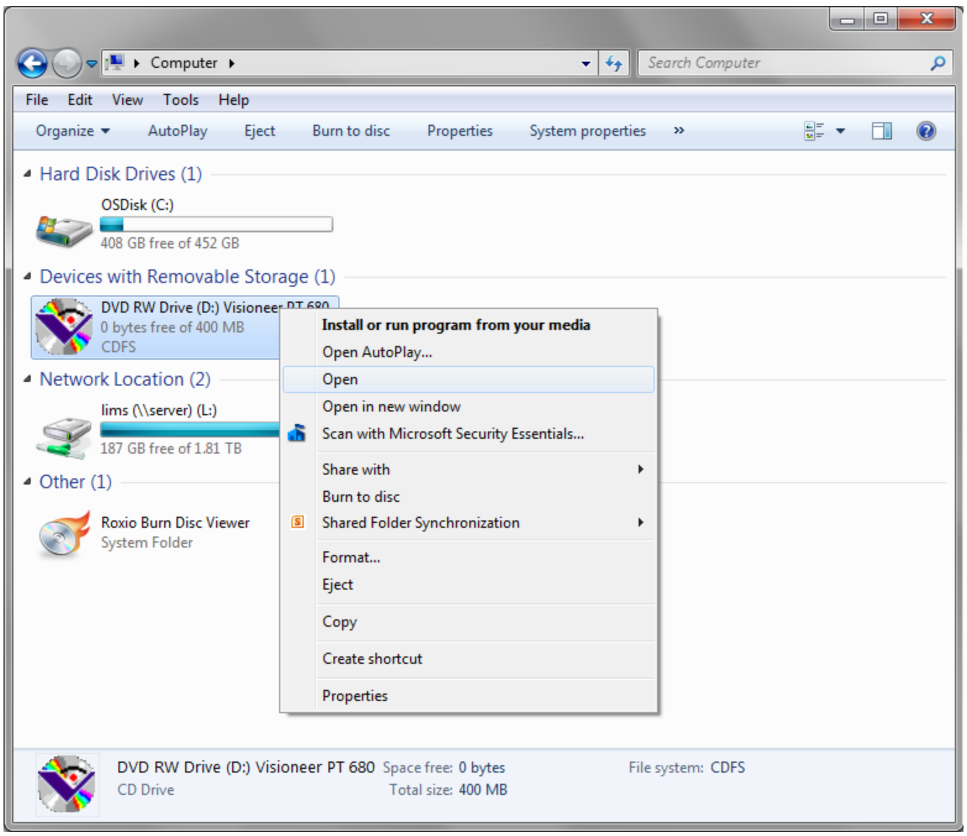
NOTE In this document, we are using the Visioneer Patriot 6870 scanner software. Please refer to your product-specific manual for driver configurations.

1. If you have the installation disc that came with your Visioneer Patriot 680 Scanner, proceed to step 2.

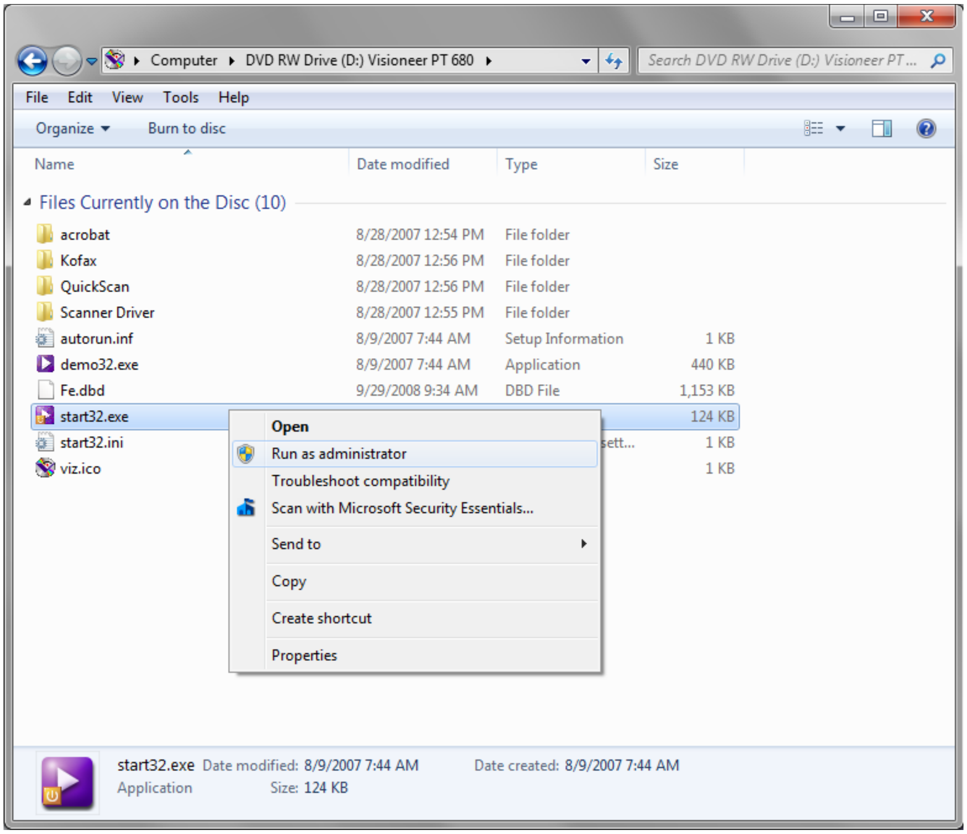
   If you do not have the disc, download the scanner driver and OneTouch software from http://support.visioneer.com. Once you have downloaded both files, go to the download location, right-click on the file named PT680.46101028.EN.msi. Select **Install** and proceed to step 5.

2. Insert Disc 1 "Application, Documentation & Driver Disc" into your computer's disk drive. The Installation menu should open automatically. If the menu does not open, see page 9 of the Visioneer Patriot 680 Scanner User's Guide for troubleshooting information.

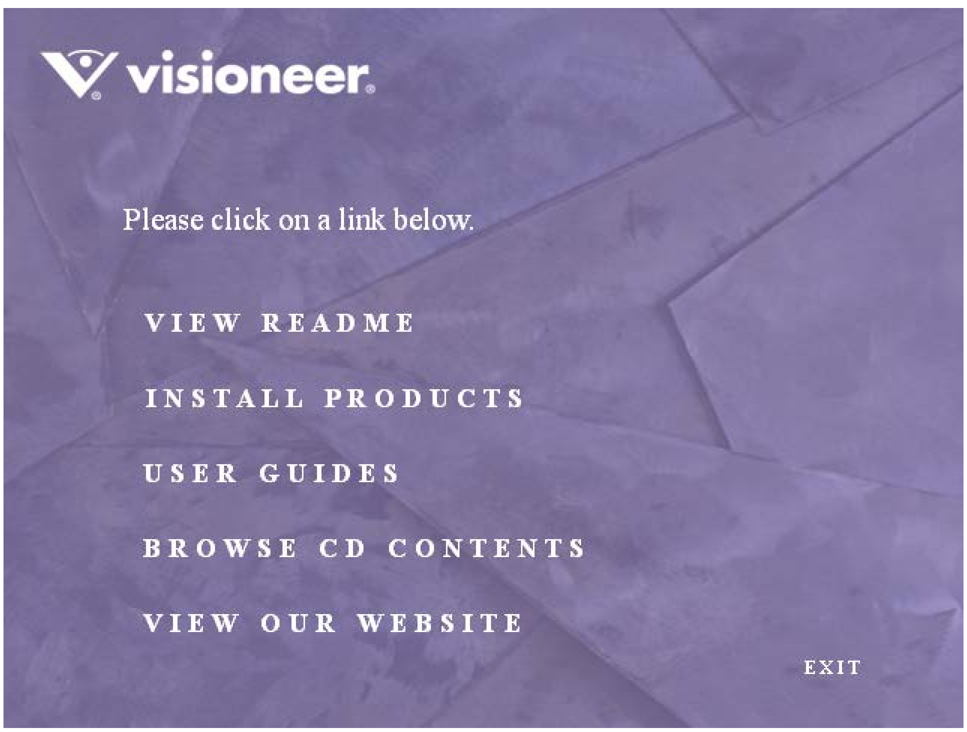
   NOTE If you are using Windows 7, you need to run the installation software as an administrator. If the program runs automatically when you insert the disc, click Exit and go to your Computer. Right-click on the disk drive and select **Open**.



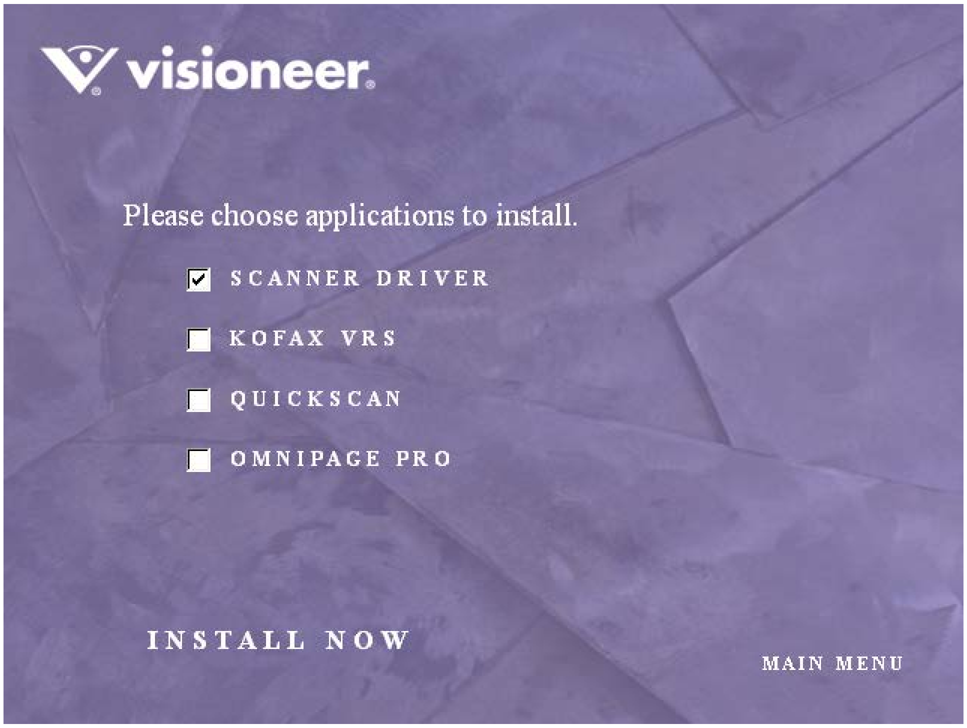
3. Right-click on the file named START32.EXE and select **Run as administrator**.



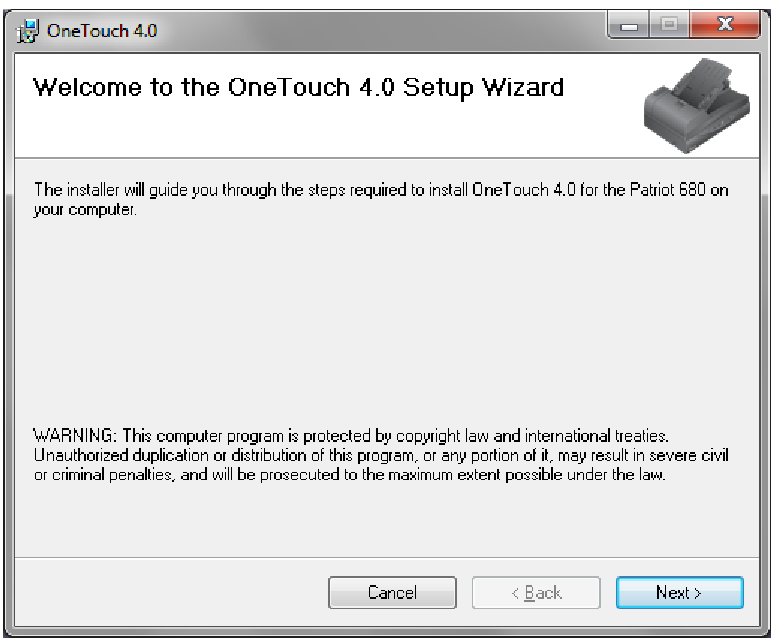
4. On the Installation menu, click Install Products.



5. Select Scanner Driver and then click Install Now.

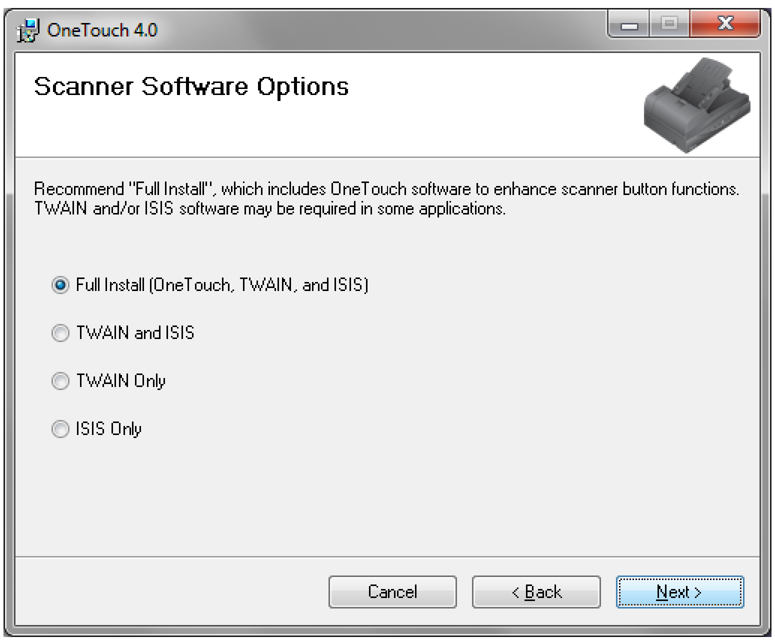


6. The OneTouch Setup Wizard will open. Click **Next.**

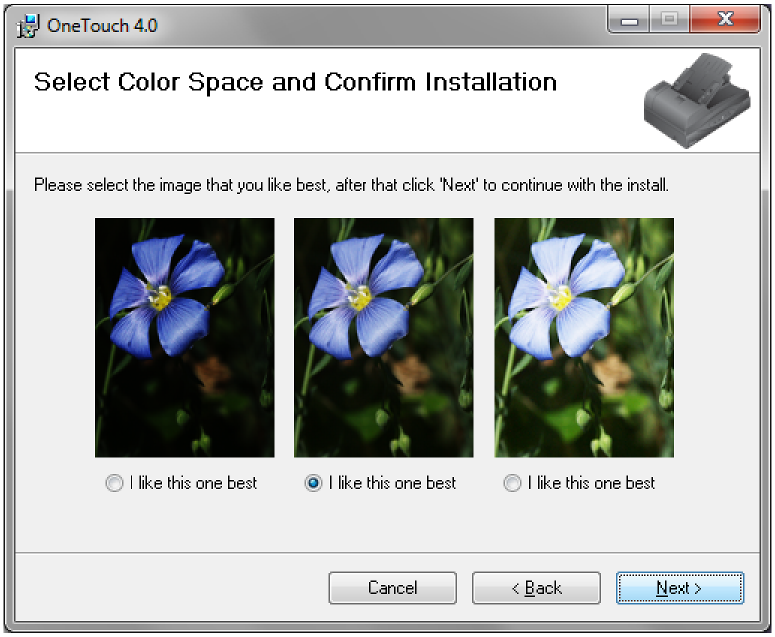


7. Select **I Agree** and click **Next.**

8. Select Full Install (OneTouch, TWAIN, and ISIS) and click Next.

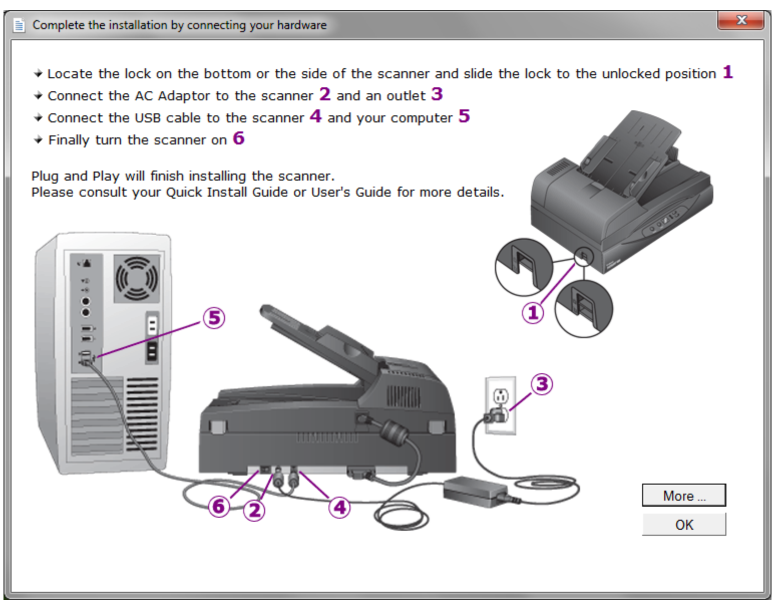


9. This screen displays three image quality samples. Select the image that looks best and click **Next**.

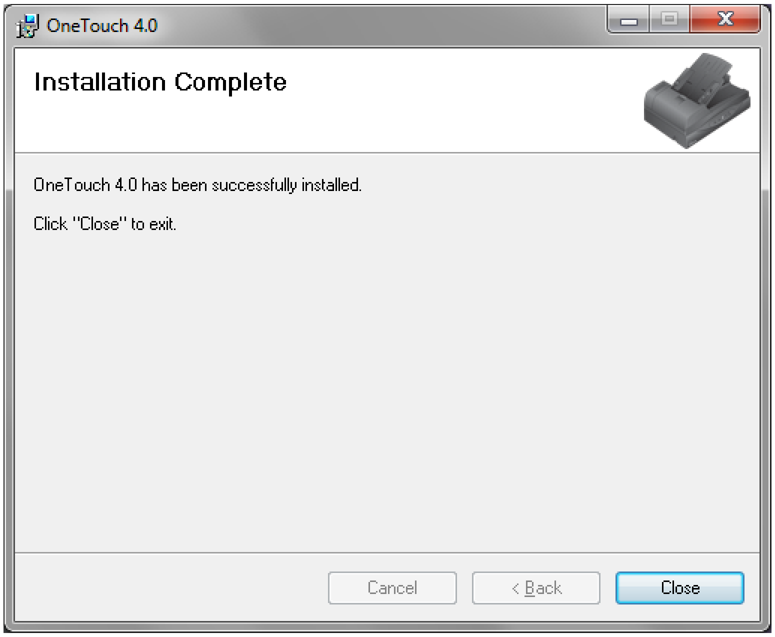


10. STOP WHEN YOU SEE THIS SET UP WINDOW. Do not click OK yet.

11. Following the instructions on the screen, connect and power on the scanner. Do not proceed until you receive a message that your computer has found the new hardware. When you're certain that the software has completely loaded, click **OK**.

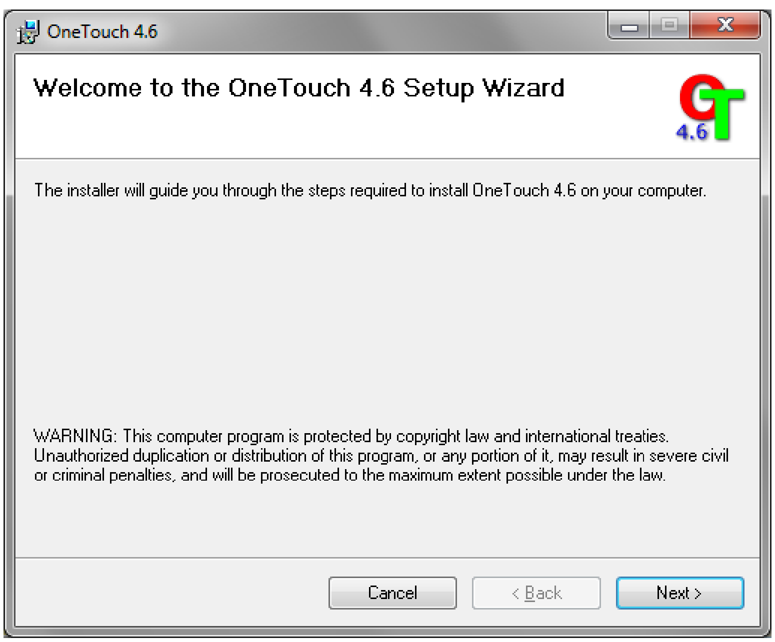


12. Click **Close** on the Installation Complete screen to exit the Setup Wizard.



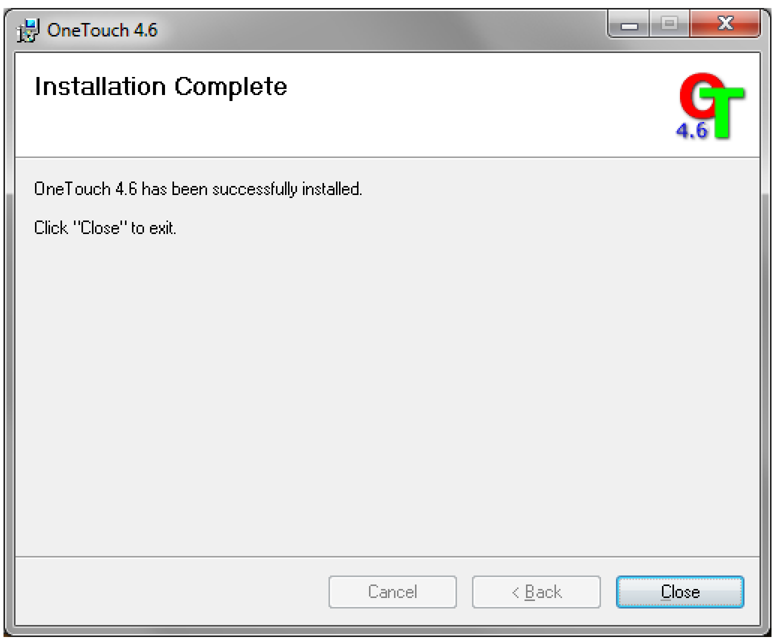
13. If you downloaded the scanner driver and OneTouch software instead of using the installation disc, go to the download location and right-click on the file named OT4.6.1112.8238.EN.msi and select Install.

14. The OneTouch Setup Wizard will open. Click **Next.**



15. Select **I Agree** and click **Next.**

16. Click **Close** in the Installation Complete window to exit the Setup Wizard.

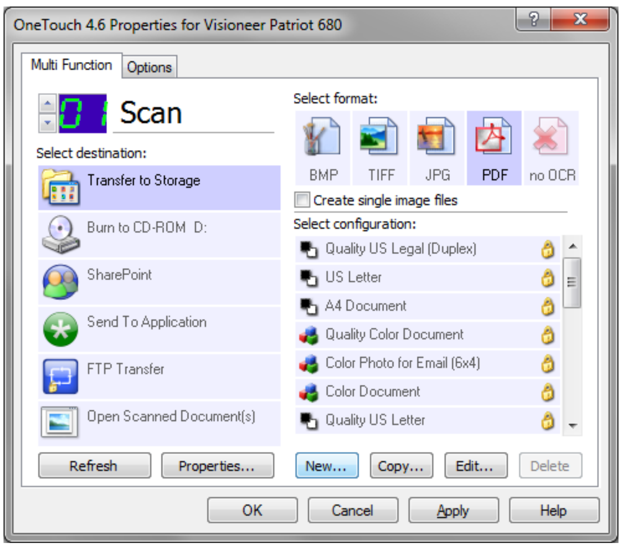


CONFIGURE THE ONETOUCH BUTTON

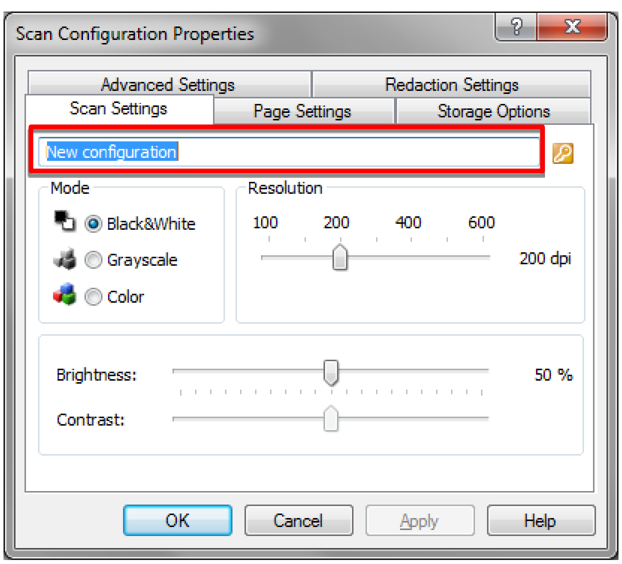
1. Once the scanner driver is installed, the one OneTouch icon will appear in your computer's taskbar. Click the OneTouch icon to display the OneTouch Button Panel.

2. Right-click on the **Scan** button in the OneTouch Button Panel. The Properties window will display.

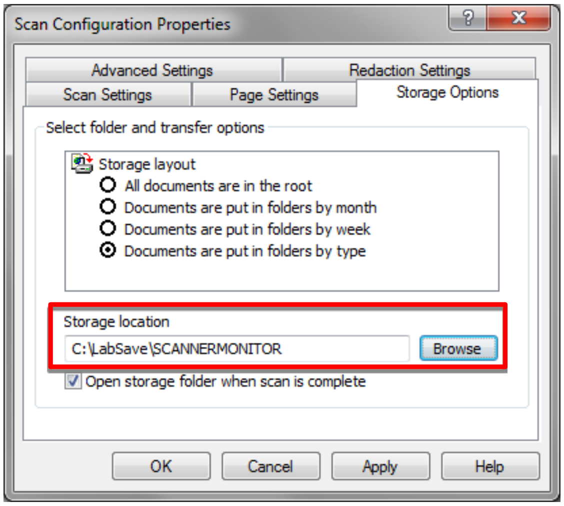
3. Click the **New** button in the OneTouch Properties window.



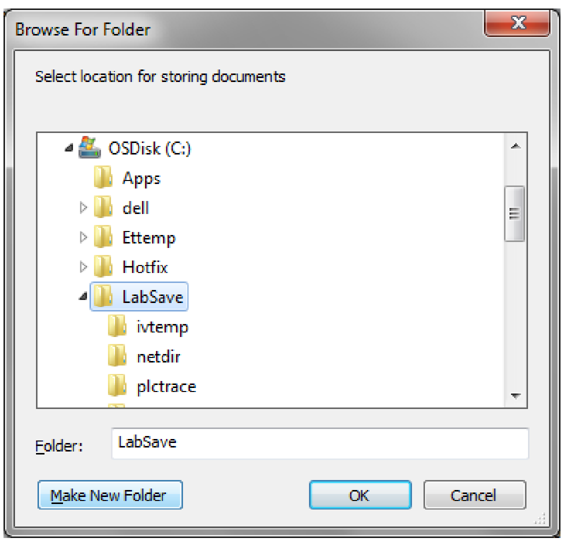
4. The Scan Configuration Properties window will display. Enter a name for the new configuration on the Scan Settings tab. The name you enter will be used to identify this configuration on the OneTouch Button Panel.



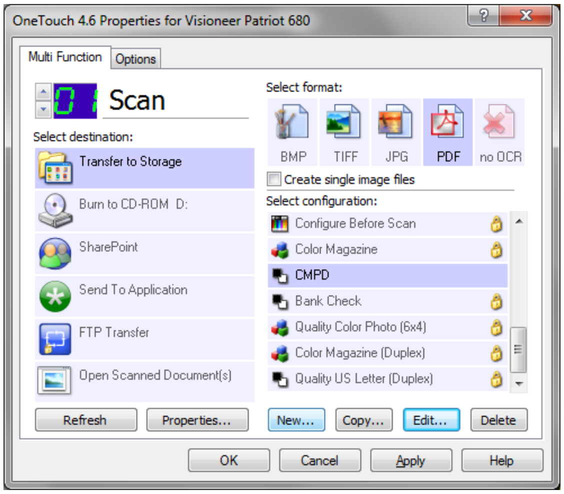
5. Select the Storage Options tab. In the **Storage location** field, enter the location where scanned images should be saved, or click Browse and select the folder in Windows Explorer. Then click **OK**.



NOTE You can create a new folder by typing the path directly into the Storage location field, or by clicking Browse and then Make New Folder in the Windows Explorer. The new folder will be added as a subfolder to the selected directory.



6. You will return to the OneTouch Properties window. The new configuration will automatically be selected on the Multi Function tab. Click **OK** to return to the OneTouch Button Panel.



CLIENT WORKSTATION SETUP

Hardware and Software Specifications

<u>All workstations</u>

- OS: Windows XP, Windows 7, or Windows 8
- Browser IE8 or higher
- Acrobat Reader 10 /11 (need to put the ActiveX)
- PLCWEB ActiveX Control
- Virus Checking, VPN, and any other system software provided by CMPD
- Read/write access to the c:\labsave folder (exclude from active scan)

<u>Conditional Components</u>

- PLIMS report writing workstations require the Black Ice printer driver. See page 132 for installation instructions.
- PLIMS report writing workstations require Microsoft Office 2007 or 2010.
- PLIMS instrument workstations need to be configured to run Porter Lee's INSTPOP application.
- Workstations using a barcode scanner must be set up according the instructions on page 99.
- Workstations using a barcode label printer will require driver installation. See page 87 for instructions.
- Workstations using a signature capture pad will require driver installation. See page 102 for instructions.
- Any workstation using a document scanner will require driver installation and configuration.
- The PLCWEB ActiveX Control will be installed on each workstation.

WORKSTATION SETUP

The workstation settings are defined in Table 6, below.

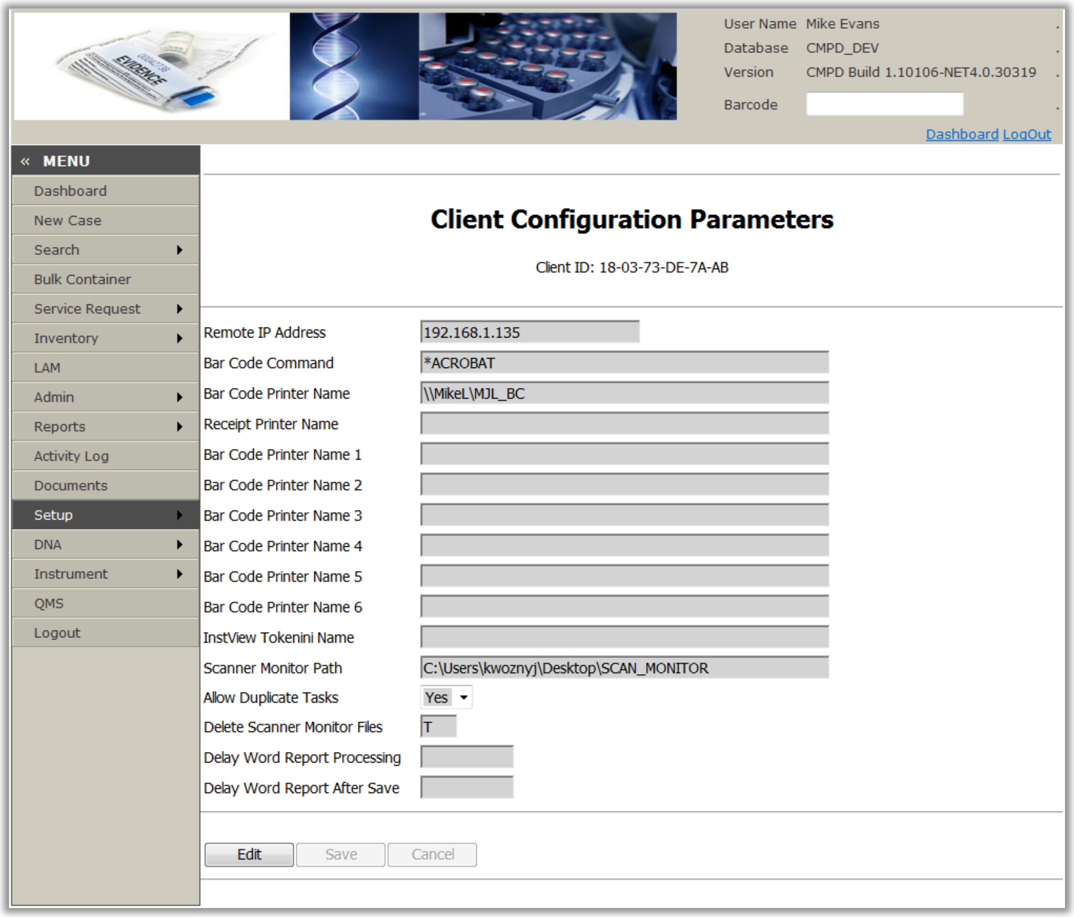


Table 6: Workstation Settings

Setting	Description
Bar Code Command	Should be set to *ACROBAT
Bar Code Printer Name	Name of barcode printer
Receipt Printer Name	Name of receipt printer
InstView Tokenini Name	Path for token.ini
Scanner Monitor Path	Defines import folder for scanner monitor feature. Files in this location will be uploaded to PLIMS
Allow Duplicate Tasks	Allows duplicate tasks in the worklist for DNA module
Delete Scanner Monitor Files	Files in scanner monitor folder will automatically be deleted once uploaded to PLIMS
Delay Word Report Processing	Enter number of seconds to delay if you get the message "Callee to Word failed" when a document is sent to Word
Delay Word Report After Save	Enter number of seconds to delay if you get the message "Callee to Word failed" when a document is sent to Word

INSTALLING BLACK ICE COLOR PRINTER

There are two main steps to install the Black Ice ColorPlus Printer:

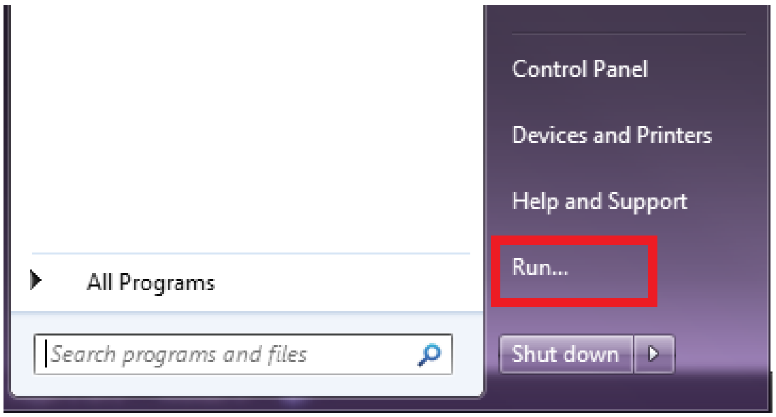
1. Install the printer driver first.
2. Install the Resource Toolkit second.

A third step is required if you are installing the Black Ice Printer on a 64-bit machine:

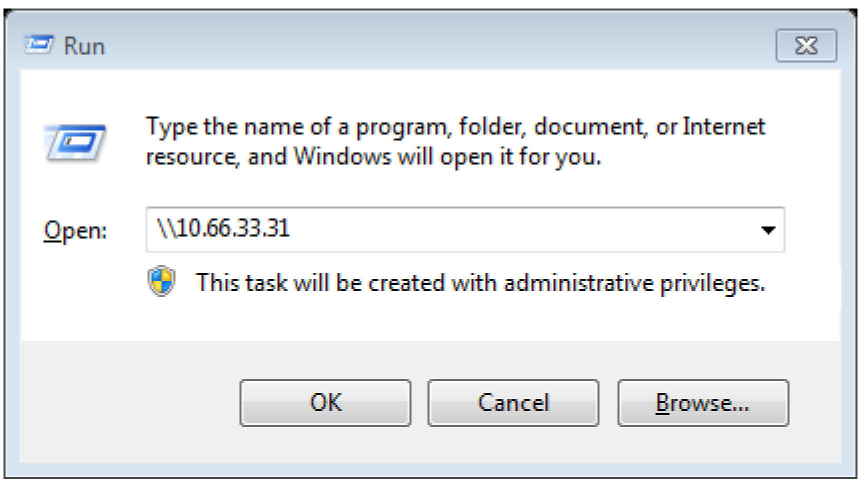
3. Register the OCX files.

CONNECT TO SERVER

1. Click **Start** and select **Run.**



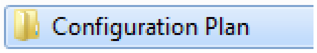
2. Type in the address shown below and click **OK.**



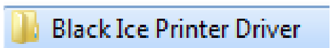
GETTING TO INSTALLER

1. Select the folder **ForDelivery to CMPD**.

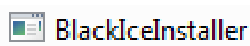
2. Select the **Configuration Plan** folder.



3. Select the **Black Ice Printer Driver** folder.

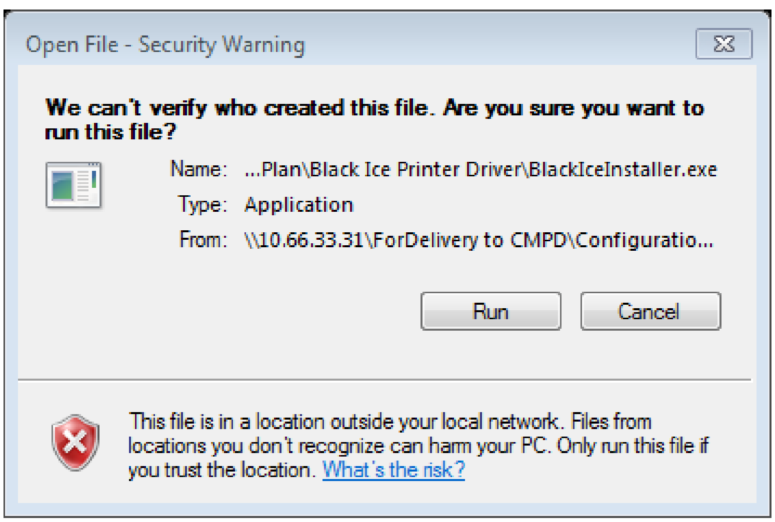


4. Right-click on **BlackIceInstaller** and select **Run as Administrator** if the option is available to you. Otherwise, double-click on the file to open it.

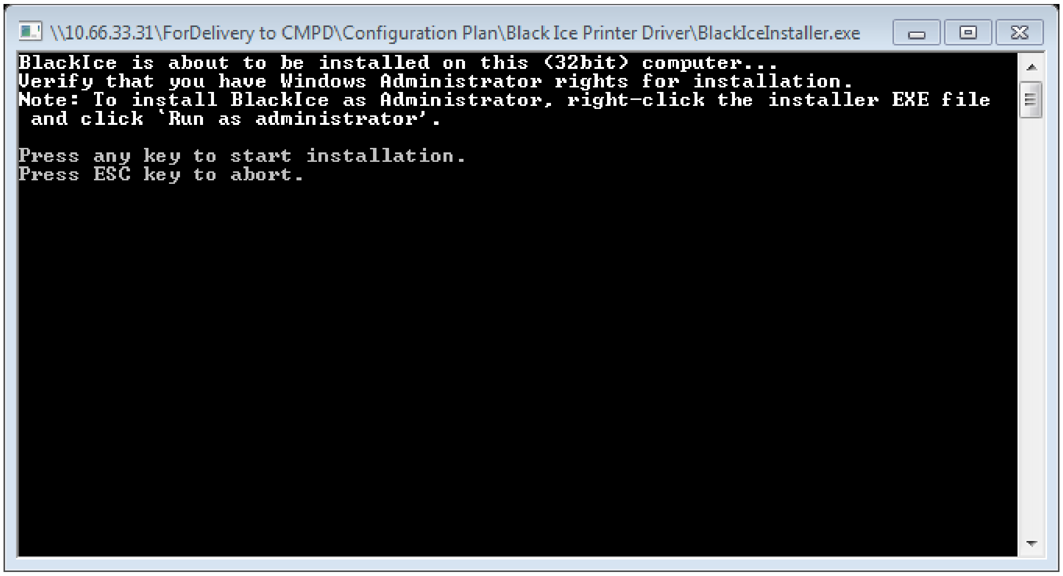


RUNNING THE INSTALLER

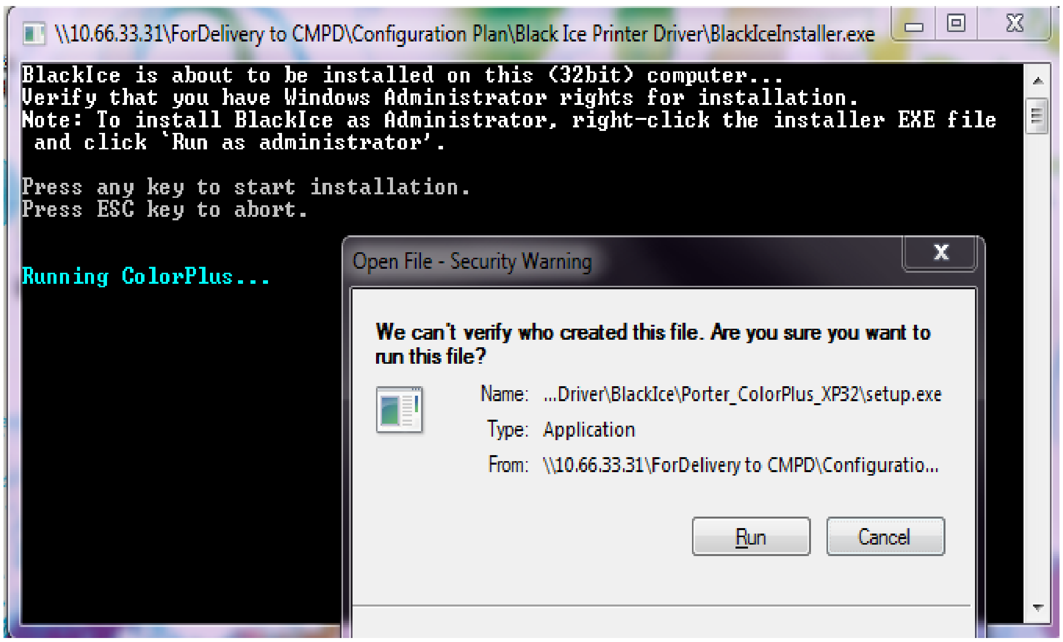
1. Once BlackIceInstaller is selected, the following screen will appear. Click **Run.**



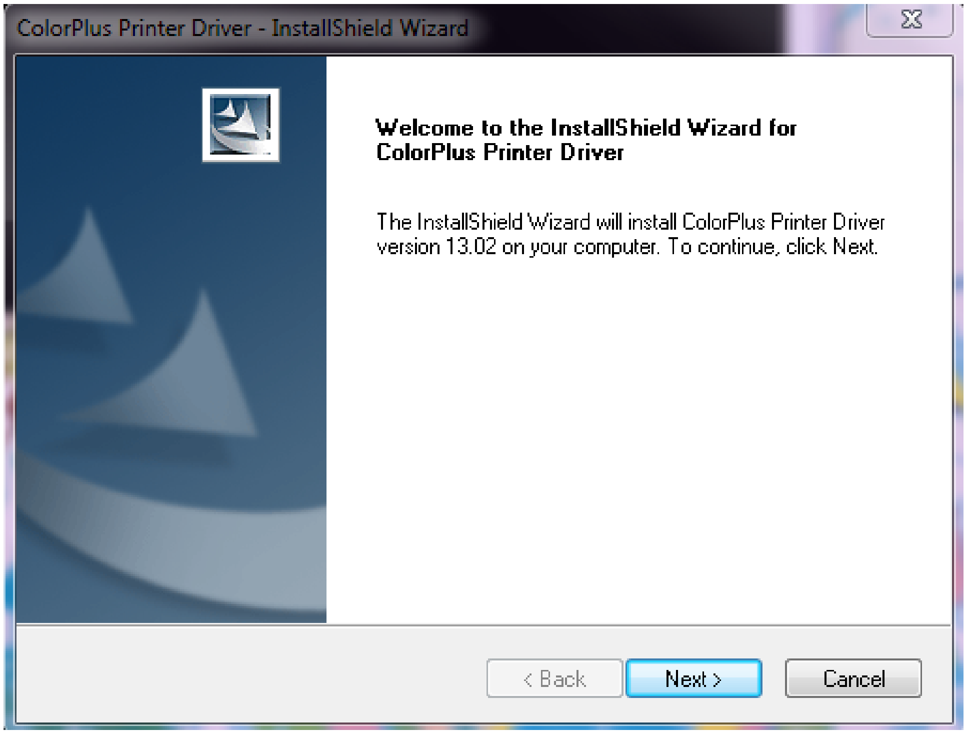
2. After you click Run, this screen will appear. Hit **[Enter].**



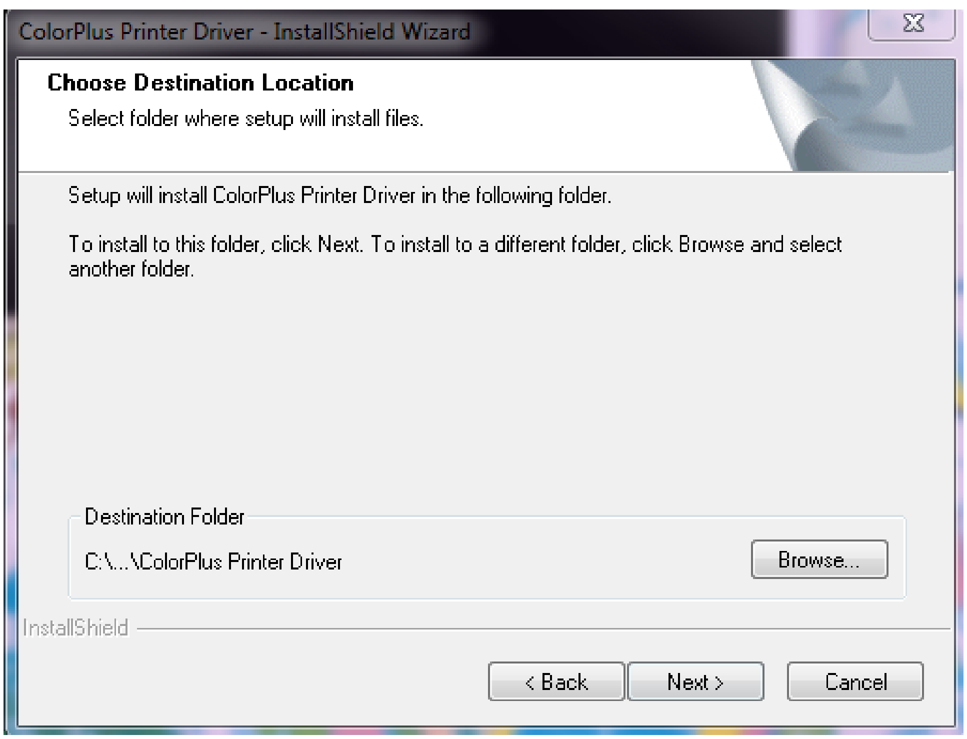
3. After you hit Enter, you'll see the screen below. Click **Run.**



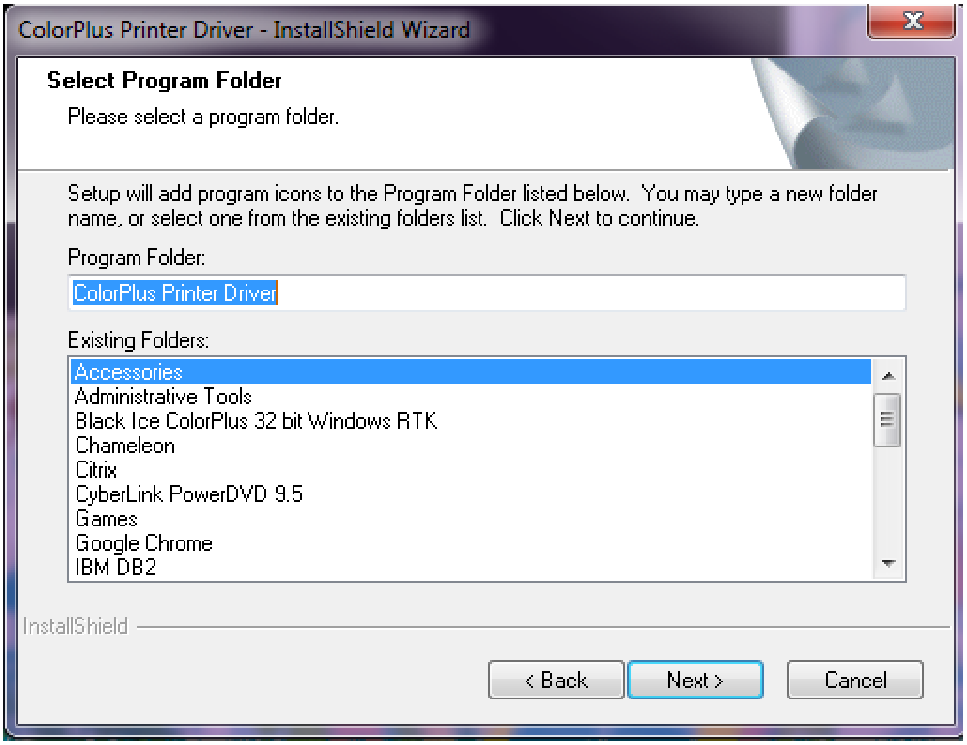
1. Make sure that it says "ColorPlus Printer Driver" and click **Next.**



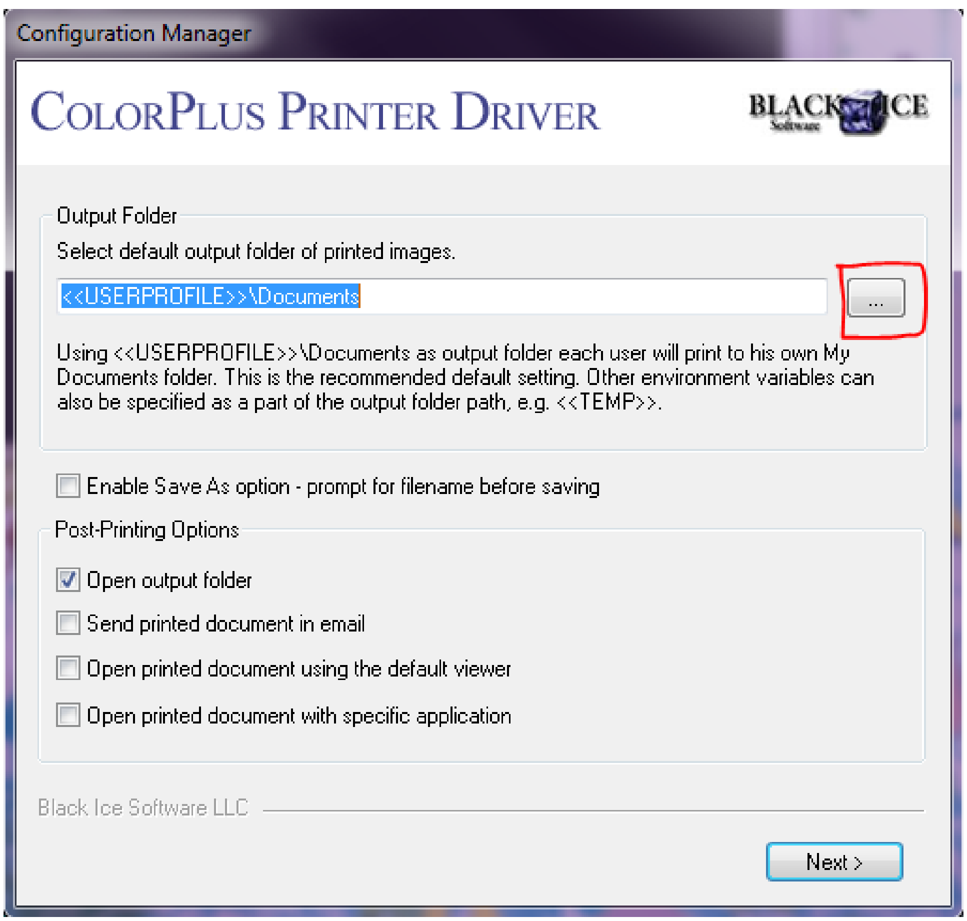
2. After you click Next, the screen shown below will display. Click **Next.**



3. Make sure the Program Folder is "ColorPlus Printer Driver" and the selected Existing Folders is "Accessories." Then click **Next.**

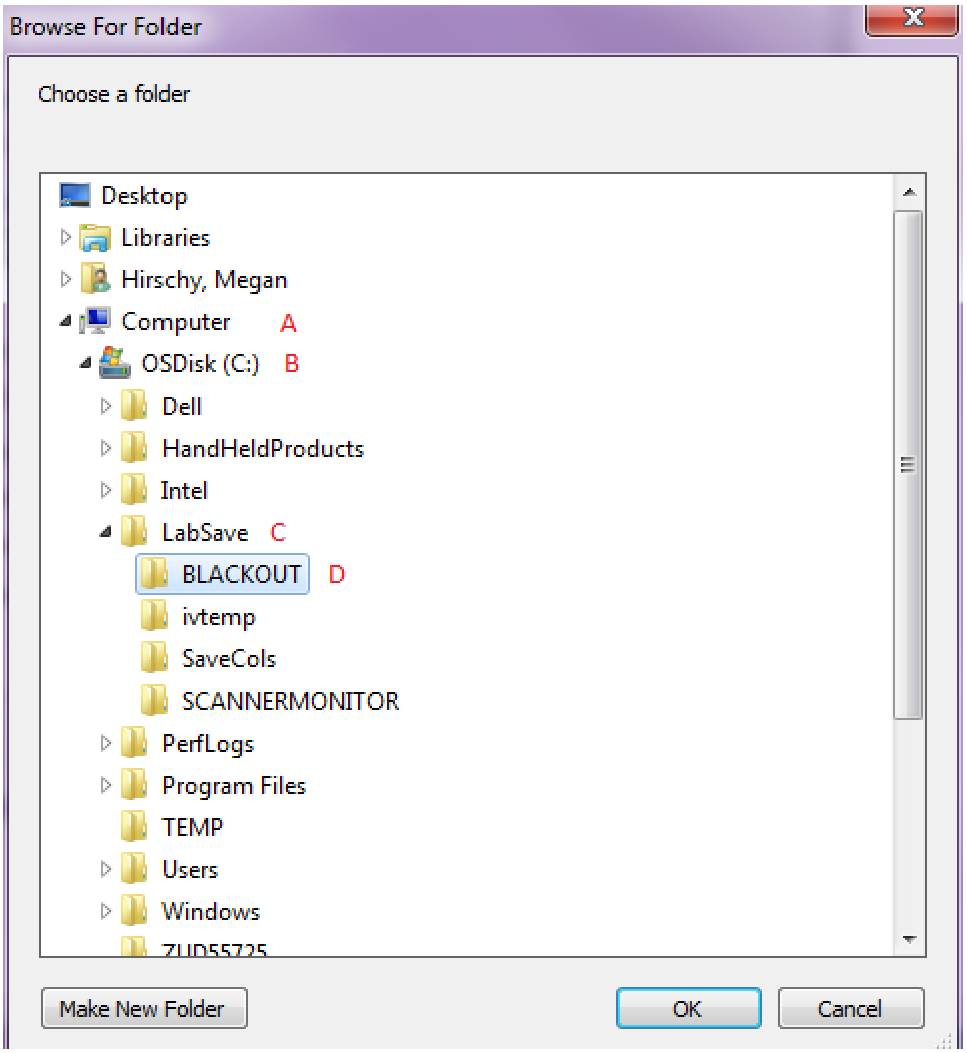


4. Click the browse button (circled in red) to select the Output Folder.

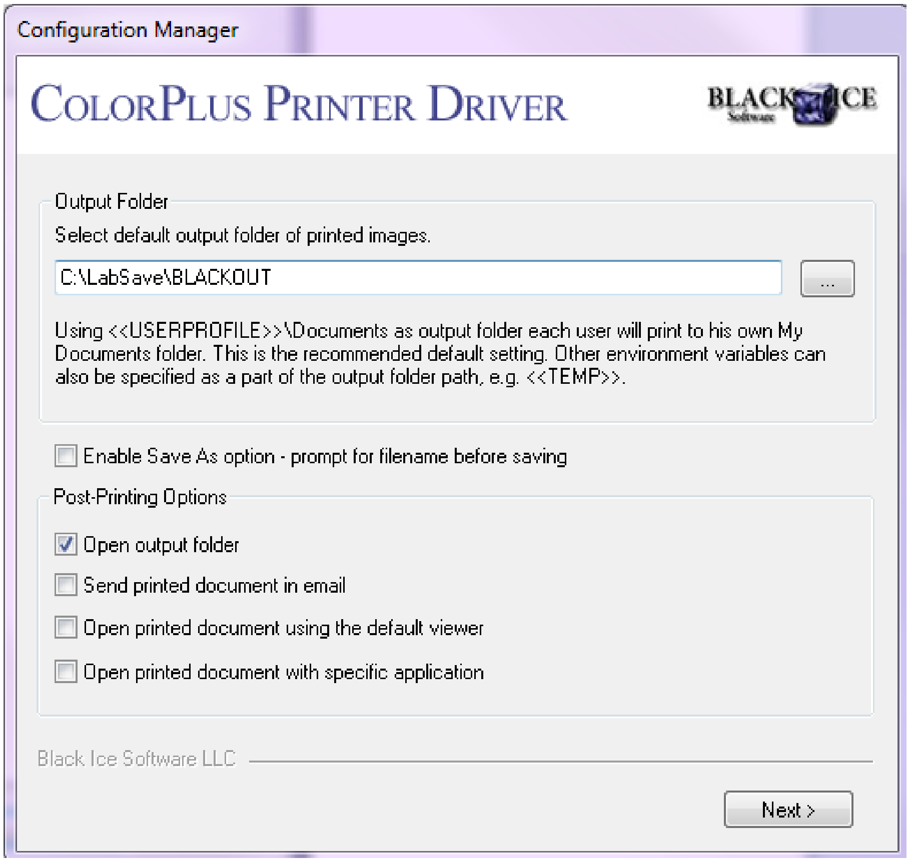


5. The screen below will pop up. Follow the letters:
    a. Select Computer
    b. C: drive
    c. LabSave
    d. BLACKOUT

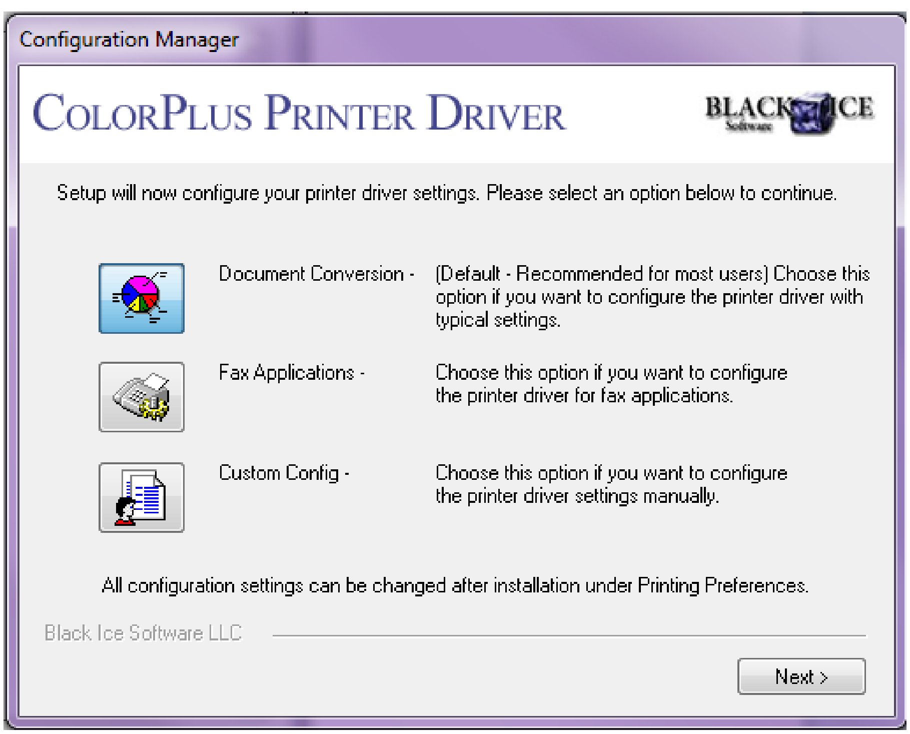
Then select **OK.**



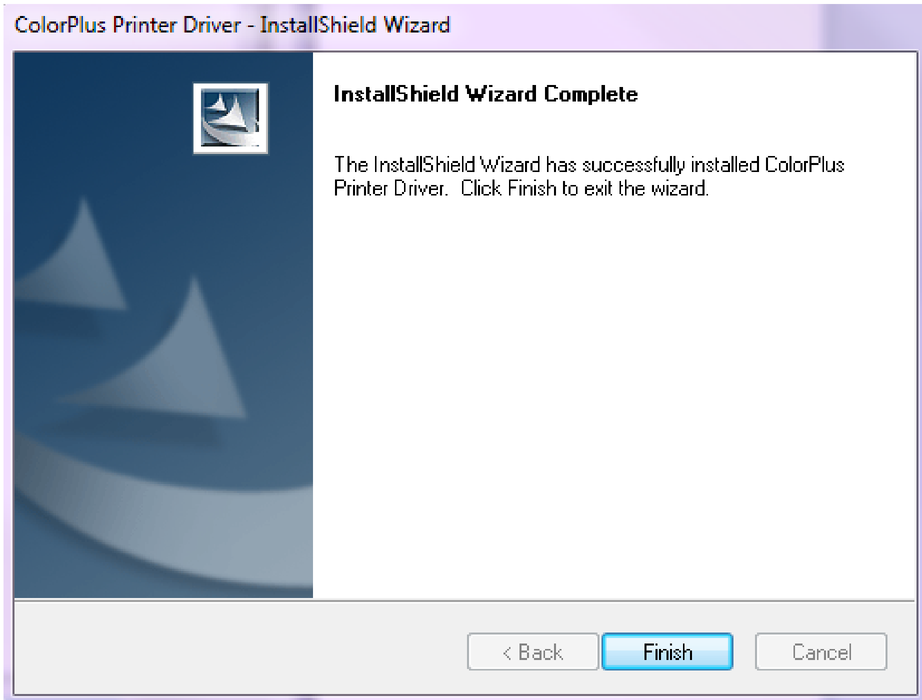
6. In the Output Folder field, it should read C:\LabSave\BLACKOUT. Select **Next.**



7. Once you select Next, the Configuration Manager ColorPlus Printer Driver screen will appear. The Document Conversion option should be highlighted blue. Select **Next.**



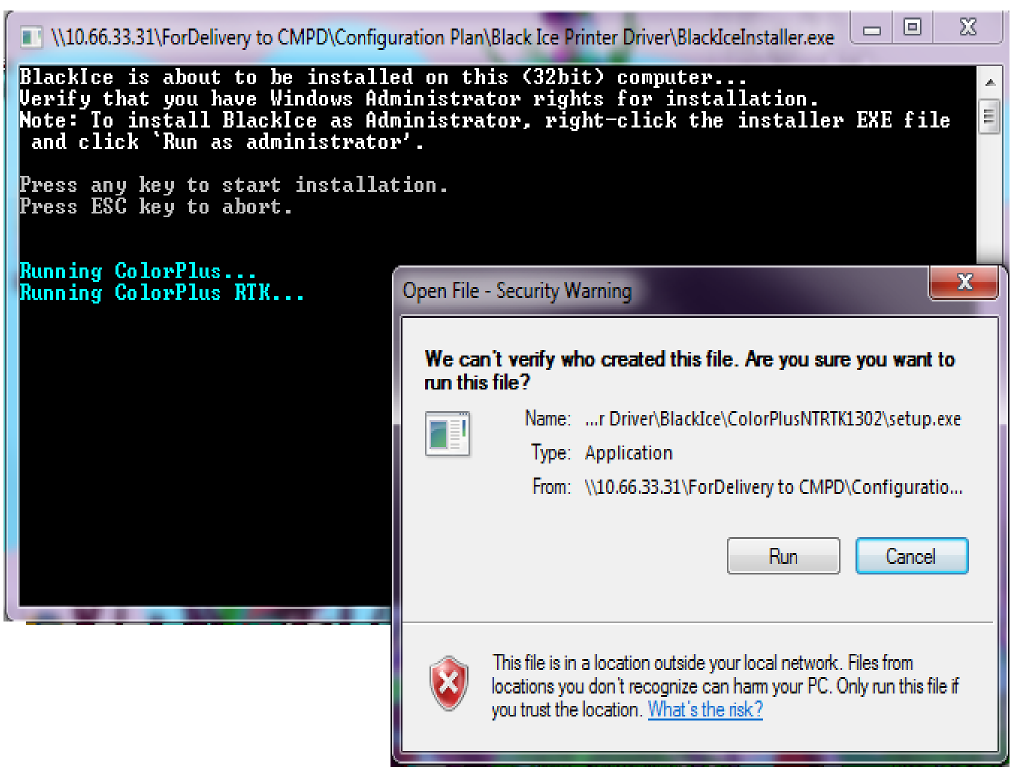
8. After you select Next, a window will display the message "InstallShield Wizard Complete." Then click **Finish.**



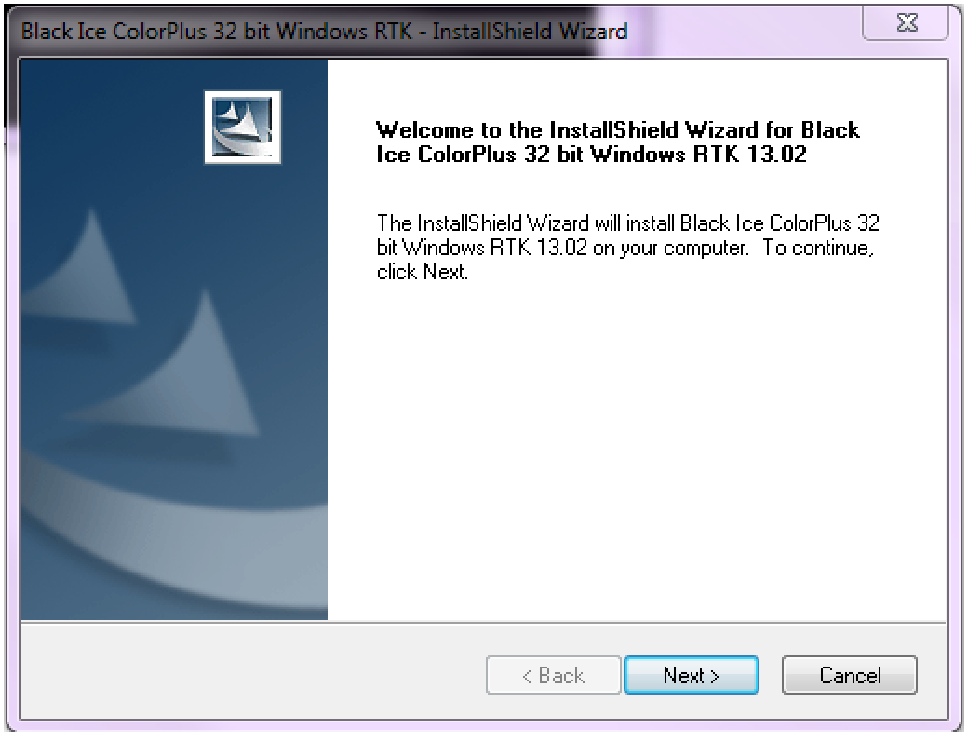
INSTALL COLORPLUS RTK

NOTE If you are installing the RTK on a 64 bit machine, you will have to register two ocx files by hand once the installation is complete. See page 146 for instructions on registering the files.

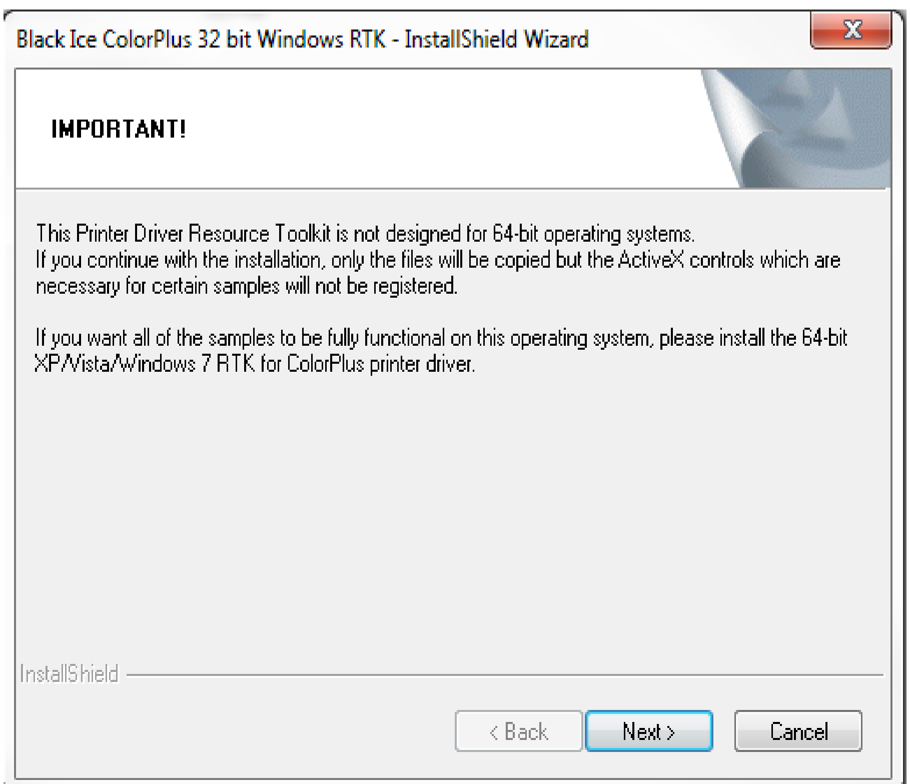
1. After you click Finish, another pop-up will display. This will be for the RTK download. Once the file opens, click **Run**.



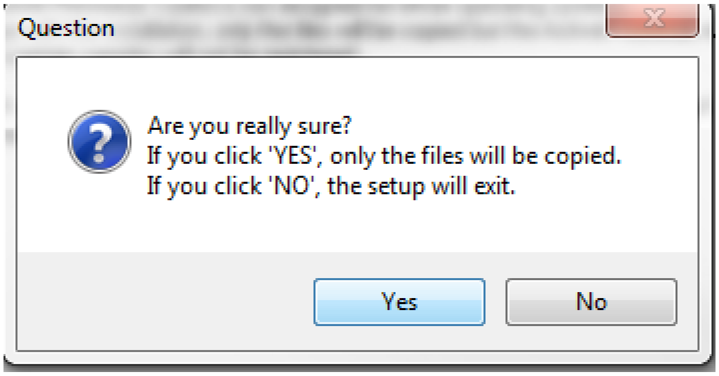
2. ColorPlus RTK will show up in the command line. Hit **[Enter].**
3. The screen below will appear. Click **Next** to start installing the ColorPlus RTK.



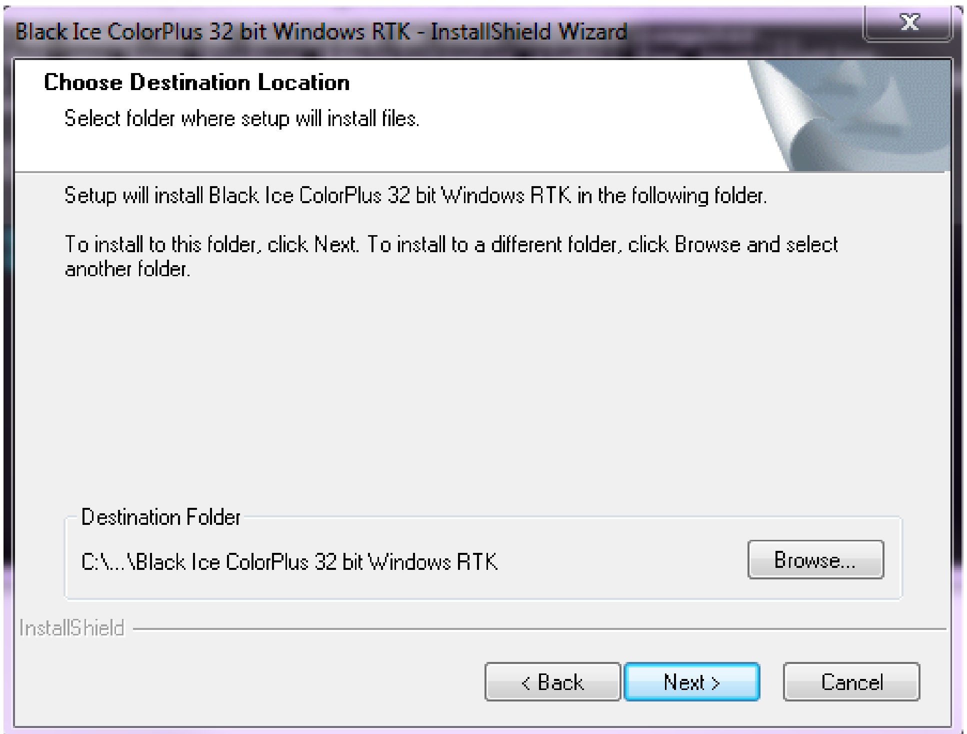
NOTE If you are installing the RTK on a 64 bit machine, you may receive the following message. Click **Next** if you receive this warning**.**



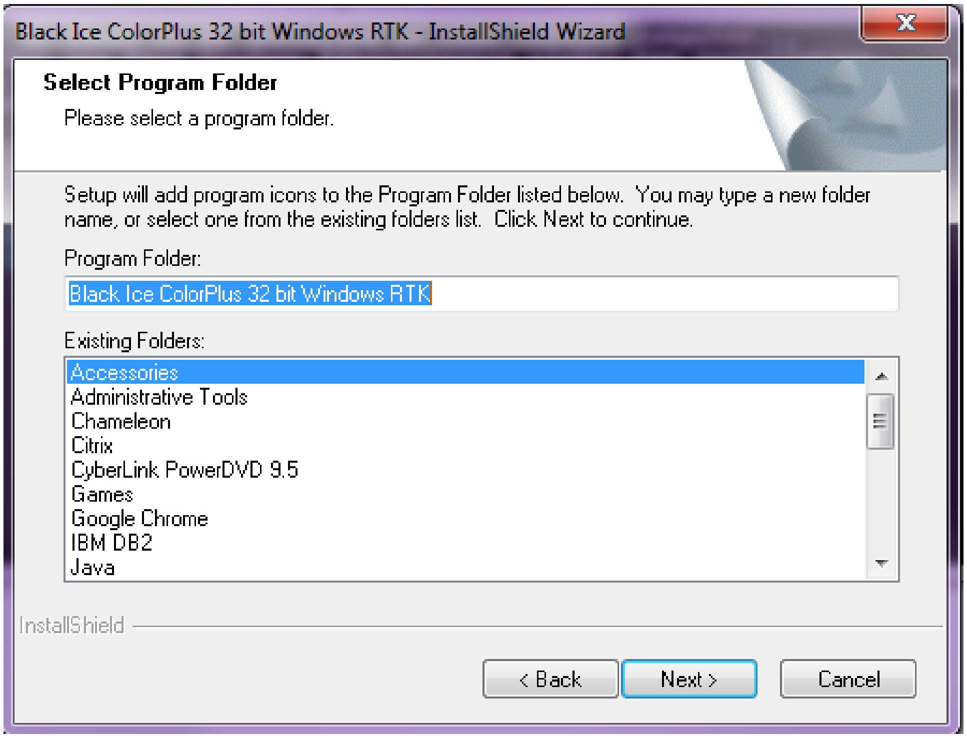
Once you click Next, the following dialog box will appear. Select **Yes** in the dialog box and continue with the installation. Once the installation is completed, see page 146 for instructions on registering the OCX files.



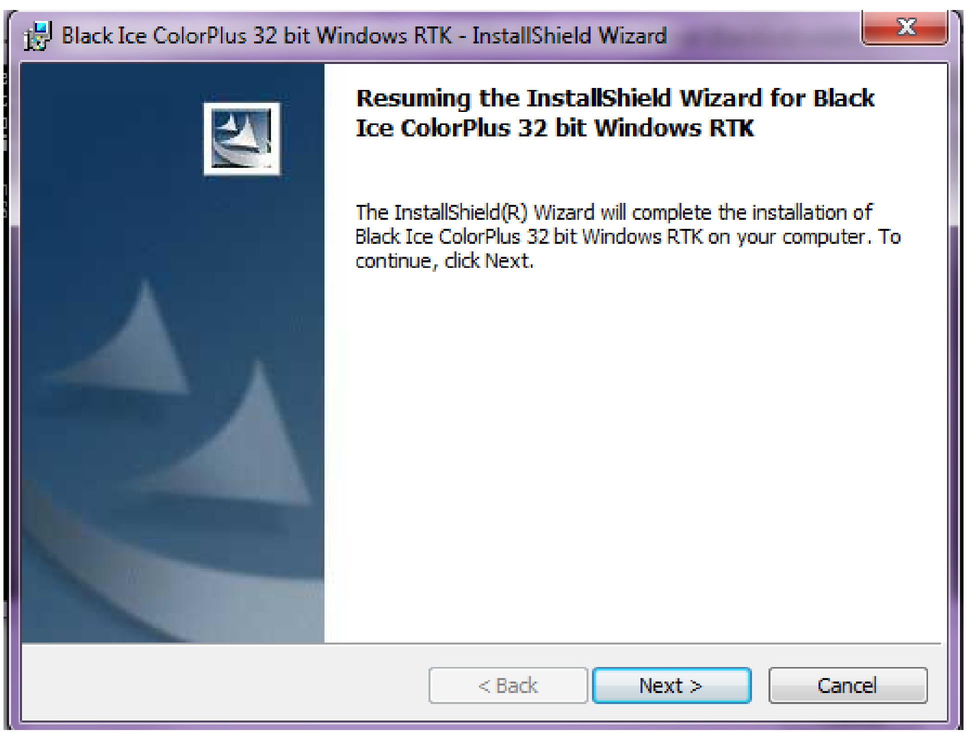
4. After you click Next, this screen for selecting the Destination Folder will appear. Click **Next.**



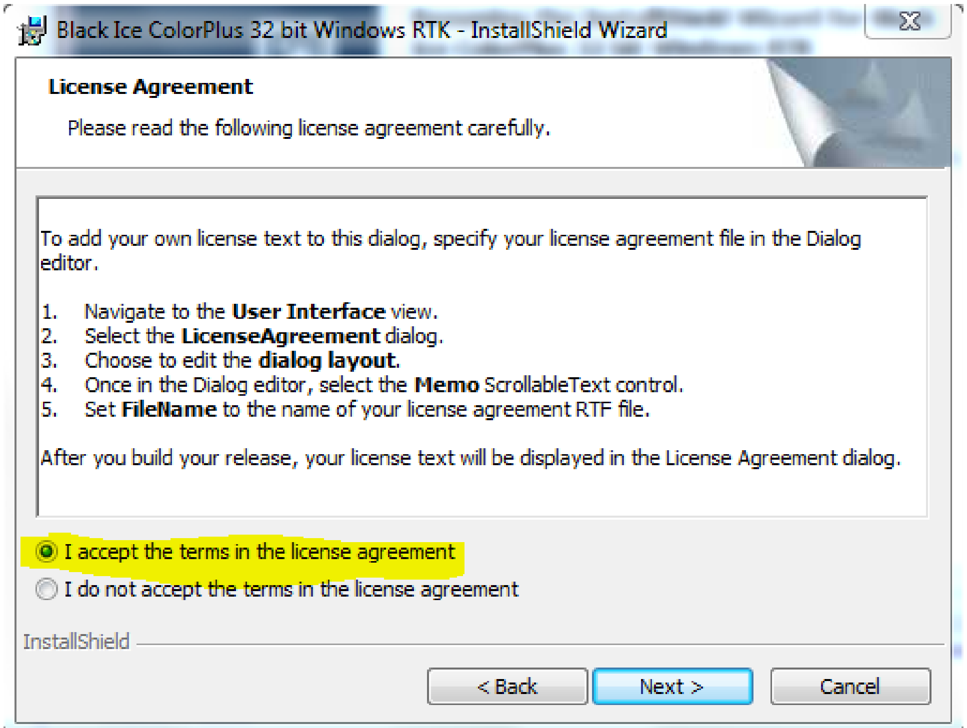
5. Once you click Next, the Select Program Folder screen will appear. Do not make any changes to the information highlighted in the fields on this screen. Leave the fields are they are and click **Next.**



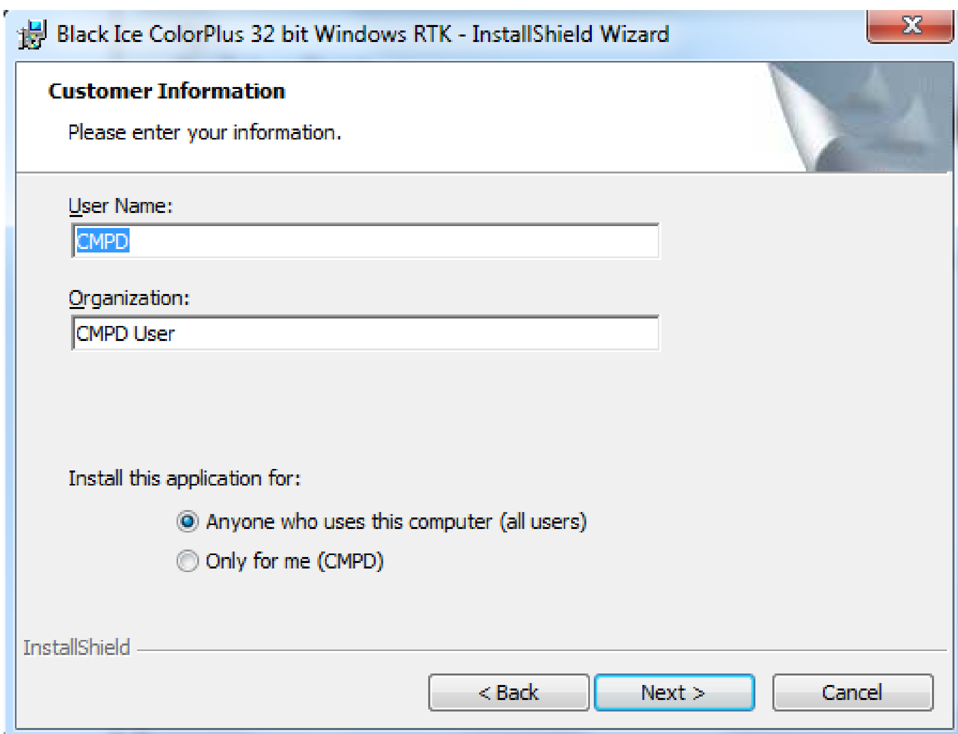
6. Once you click Next, the Resuming InstallShield Wizard for Black Ice ColorPlus 32 bit screen will come up. Click **Next.**



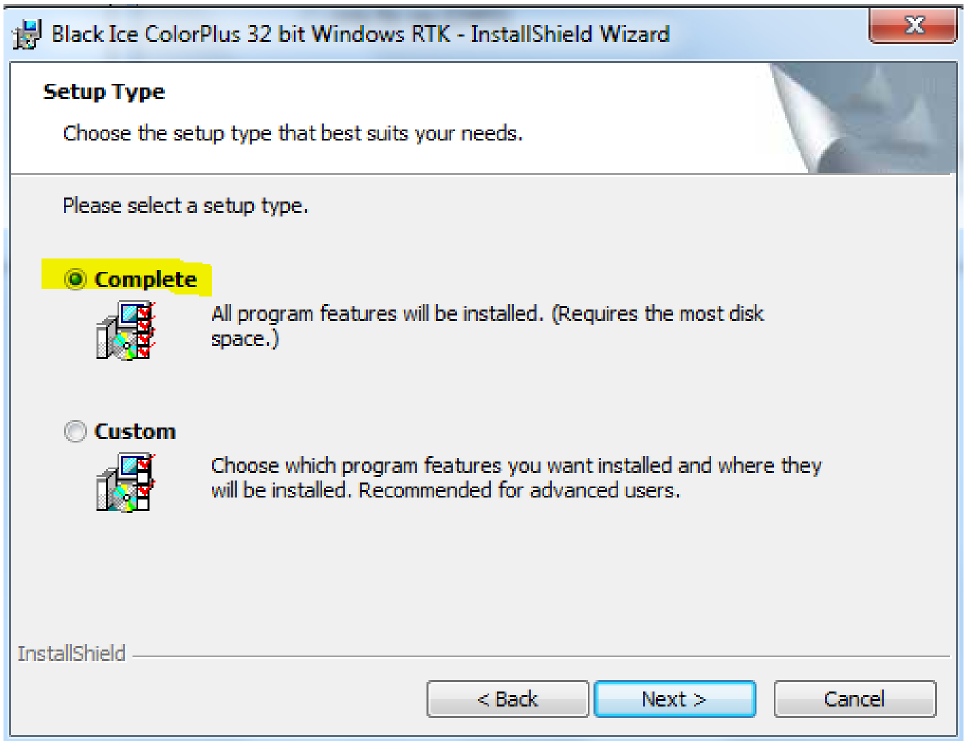
7. Once you click Next, the License Agreement screen will appear. Select “I accept the terms in the license agreement” and click **Next.**



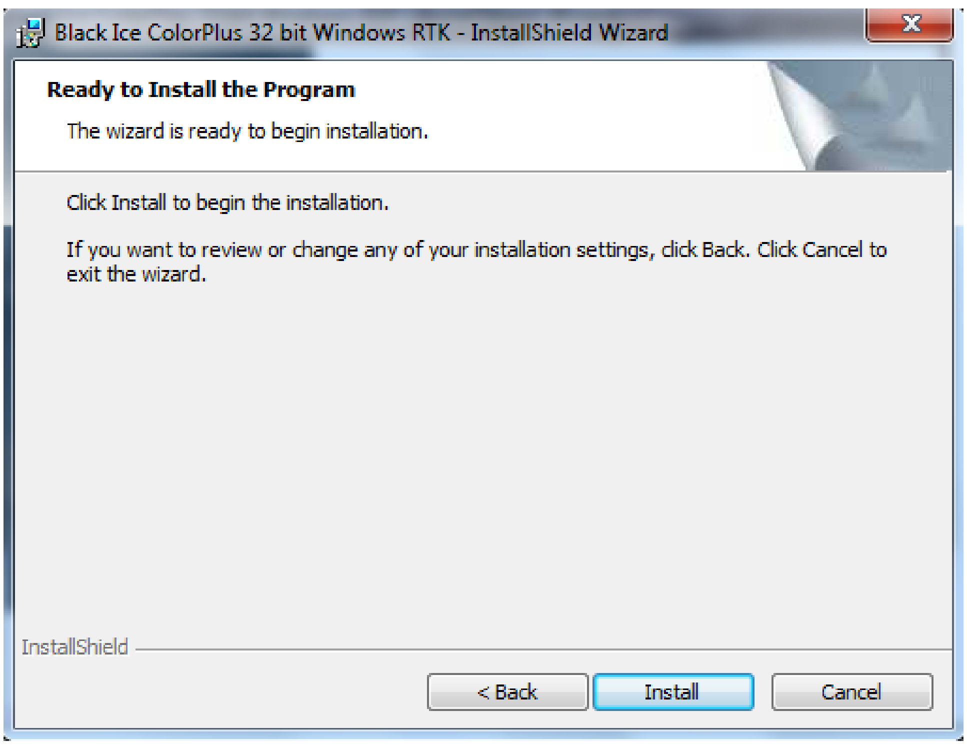
8. Once you click Next on the License Agreement screen, the Customer Information screen will appear. Click **Next** on the Customer Information screen.



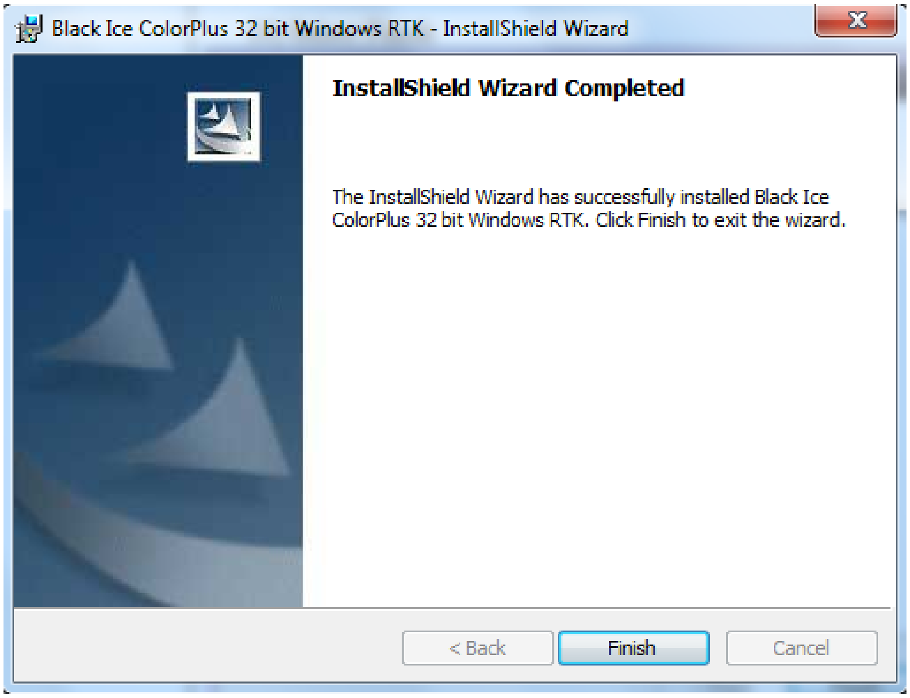
9. The Setup Type screen will appear. Make sure **Complete** is selected on this screen. Once you've made sure the correct option is selected, click **Next.**



10. Once you click Next, the Ready to Install the Program window will appear. Click **Install.**

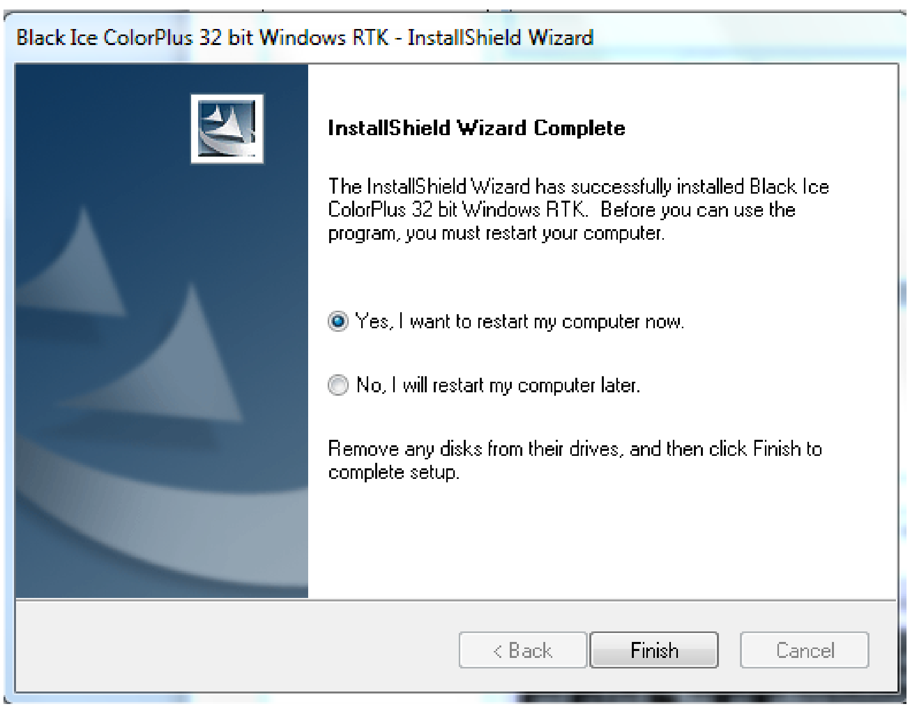


11. Once you click Install, the installation process will start. Then you will see the screen shown below. Click **Finish** once this screen displays.



12. Once you click Finish, you might see the screen shown below. You can select "Yes, I want to restart my computer now" OR "No, I will restart my computer later."

NOTE If this window comes up and you select "Yes, I want to restart my computer now," check for successful installation of Black Ice when your computer reboots.



NOTE If this screen does not appear after you click Finish, then you will see the message "Successful Install: Black Ice is now installed on your computer." Then you can complete the steps to make sure the install was successful.

REGISTER OCX FILES (64 BIT WINDOWS)

If you are installing the Resource Toolkit on a 64-bit machine, you will have to register the following two ocx files by hand once the installation is complete:

biprndrv.ocx

blackicedevmode.ocx

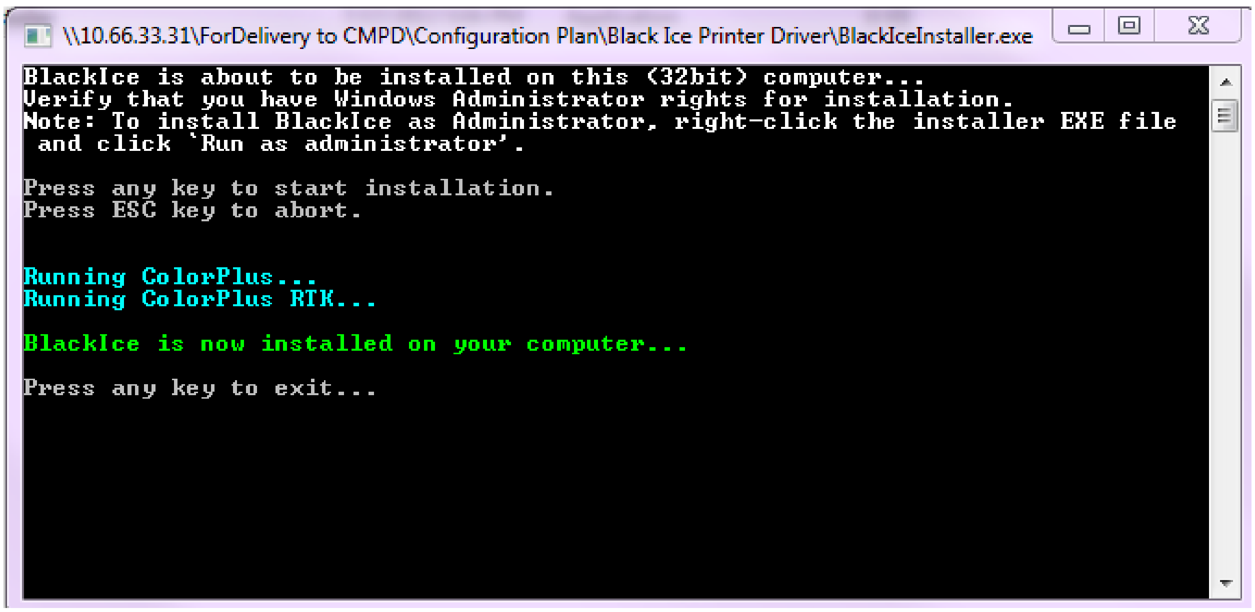
In order to register the files, copy **ALL** of the files from the following location to your C: drive:

\\10.66.33.31\PLIMS_Final_Documentation\ForDelivery to CMPD\Configuration Plan\Black Ice Printer Driver\PLCBin

Once the files are copied over, right-click on the reg.bat file and select **Run as administrator** in the context menu. This should complete the registration.

SUCCESSFUL INSTALL

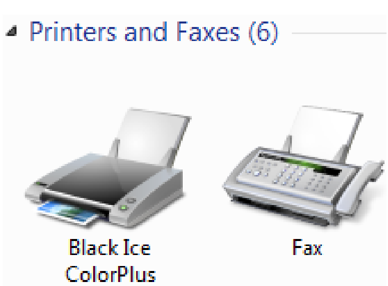
If the installation was successful, you should see this screen. Press any key to close the window,



CHECK FOR SUCCESSFUL INSTALLATION

View Devices and Printers:

1. Go to start and select Devices and Printers
2. Black Ice ColorPlus should show up under Printers and Faxes.



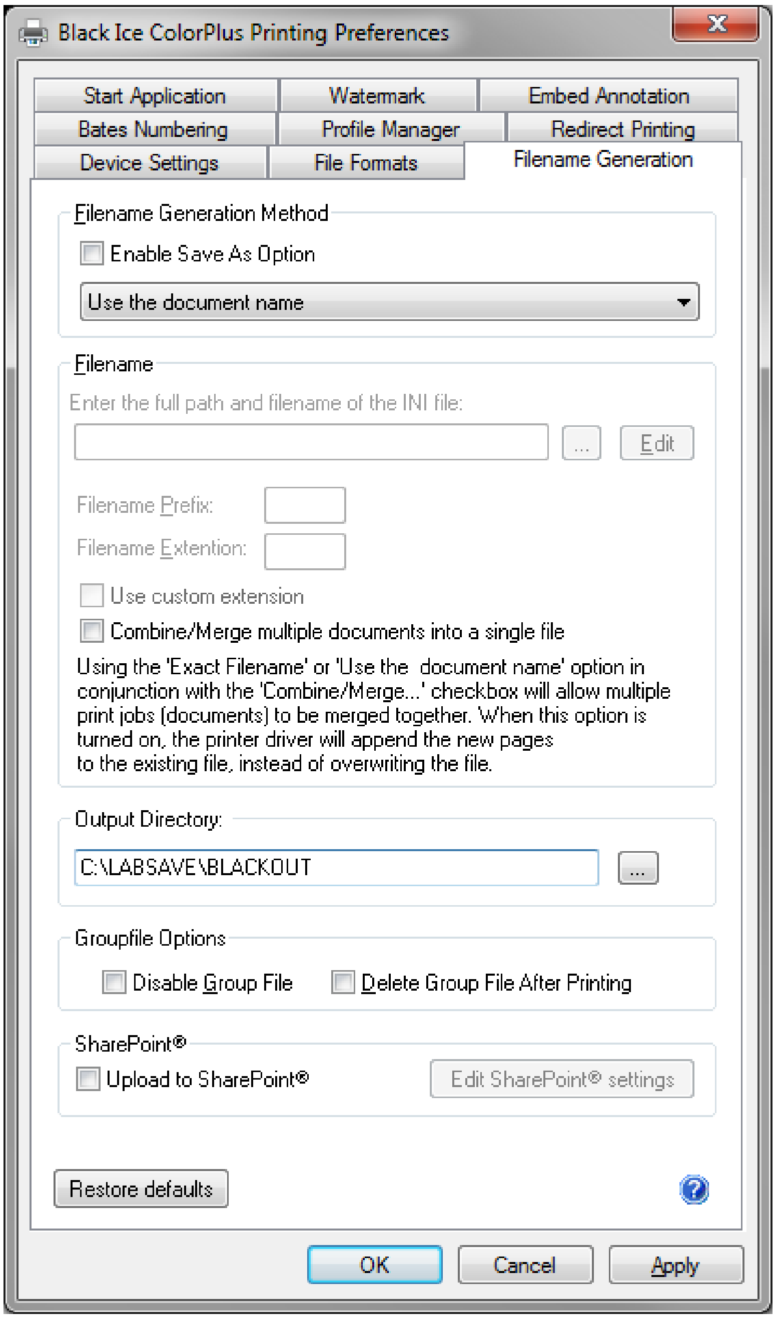
Print document using Black Ice ColorPlus printer:

1. Open Microsoft Word and enter some text into a document.
2. Click File and Print.
3. Select the new Black Ice printer and print the document. You should have a PDF document in the new C:\LABSAVE\BLACKOUT directory with the text you typed into the document.

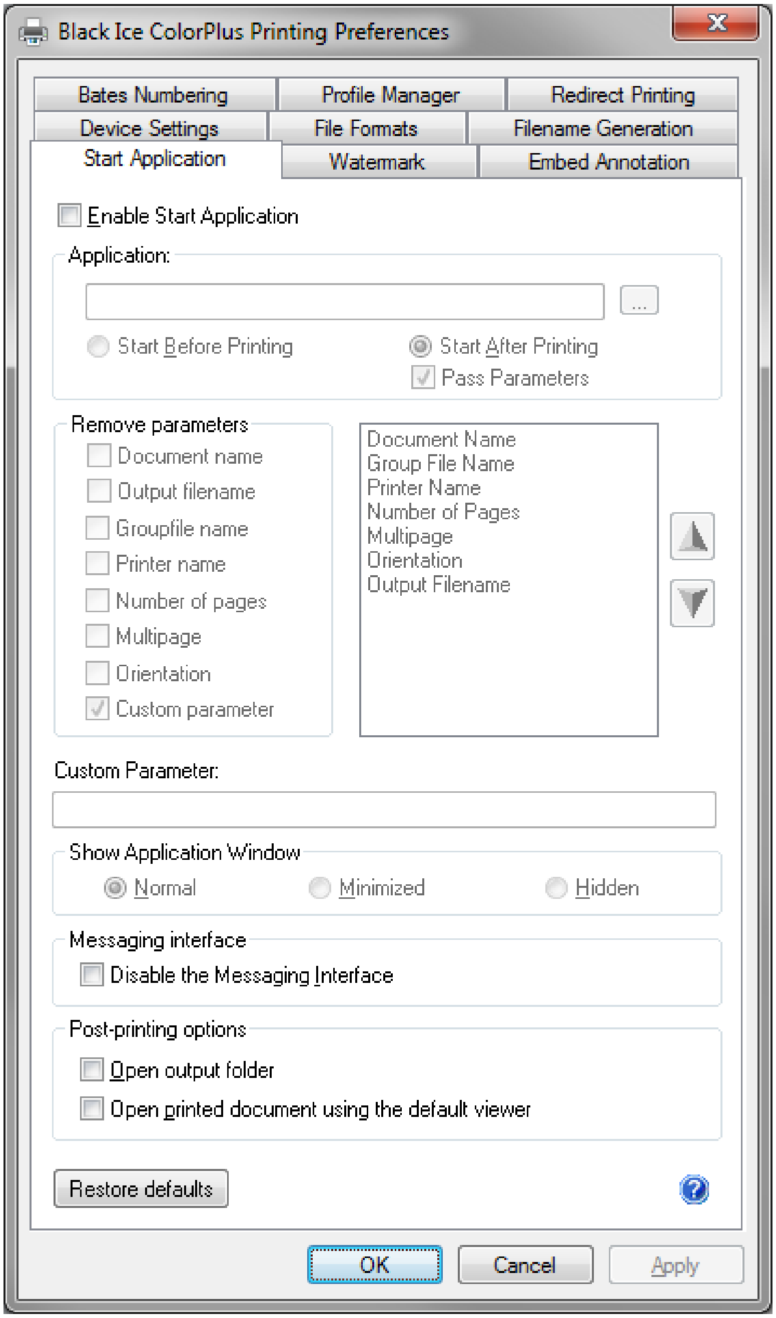
TROUBLESHOOTING

Open the Black Ice printing preferences from the Control Panel. Go to the Filename Generation tab and verify that you have the following settings.

NOTE This is only on standard workstations. Instrument computers have different Black Ice settings.



Go to the Start Application tab and verify you have the following settings:



NETWORK DEPLOYMENT OF PLCWEB.OCX

The PLIMS software uses an ActiveX control to perform several functions that must run on the client computer. These include:

- Controlling Microsoft Word to generate reports
- Direct printing of receipts and barcodes to the printer without going through the windows printer selection dialog
- Instrument Interface function for sending data to and receiving data from analytical instruments
- Interfacing to document scanners

Four separate OCX controls are available for use for the Testing, Training, and Production environment. The PLCUpdate control will always be installed and is used to update the other controlled when needed.

File Name	Class ID	Description
PLCUPDATE.OCX	{C16AEE46-115F-416d-B539-AD7CEA1CDBC}	Used to load the other OCX controls. Always installed for every environment.
PLCWEB-PRD.OCX	{3F5D0EDD-D290-4643-AFA3-5FB718C2739E}	Production
PLCWEB-TRN.OCX	{38490131-0902-4bde-9CAA-04ADF22D9F42}	Training
PLCWEB-TST.OCX	{0EE49F2A-04AC-4ee9-B59E-4F2E32B75D56}	Testing

INTERFACES

This section includes documentation on the interfaces in your system implementation:

- RMS connection
- RMS web application
- Configuring ChemStation sequence file import

RMS CONNECTION

CONNECTION FOR PLIMS CASE CREATION

Interface Objective: Connect to KBCOPS using the complaint number. If the complaint number is in KBCOPS and the incident report is at least of working status, the case will be found. If the case has already been entered in PLIMS, the system will not reimport the information.

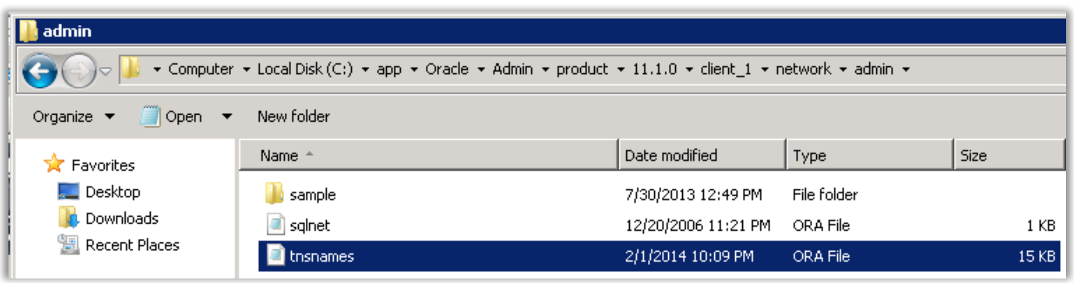
This connection relies on two things:

1. The ORACLE connection setup on the webserver
2. The connection set in the database

ORACLE CONNECTION SETUP ON WEBSERVER

The Oracle Client needs to be installed on the webserver. Locate the tnsnames file on the Development webserver 10.66.33.31 (MYRS-CLIMS-01).

C:\app\Oracle\Admin\product\11.1.0\client_1\network\admin



The following is the entry to connect to the test RMS database:

```
RMS204 =
 (DESCRIPTION =
  (ADDRESS_LIST =
   (ADDRESS = (PROTOCOL = TCP)(HOST = 172.16.7.155)(PORT = 1571))
  )
  (CONNECT_DATA =
   (SERVICE_NAME = rms204)
  )
 )
```

NOTE The CMPD Oracle DBA will have the correct TNSNames and account information to connect to KBCOPS RMS.

To test this connection, go to a command prompt and type: Sqlplus. Press enter.

```
Administrator: Command Prompt
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation.  All rights reserved.

C:\Users\11199c>sqlplus_
```

Enter the user name connection: “11199c”@RMS204. Press enter.

```
Administrator: Command Prompt - sqlplus
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation.  All rights reserved.

C:\Users\11199c>sqlplus

SQL*Plus: Release 11.1.0.7.0 - Production on Mon Feb 10 23:04:55 2014

Copyright (c) 1982, 2008, Oracle.  All rights reserved.

Enter user-name: "11199c"@RMS204_
```

Enter the password: B$u95cRy

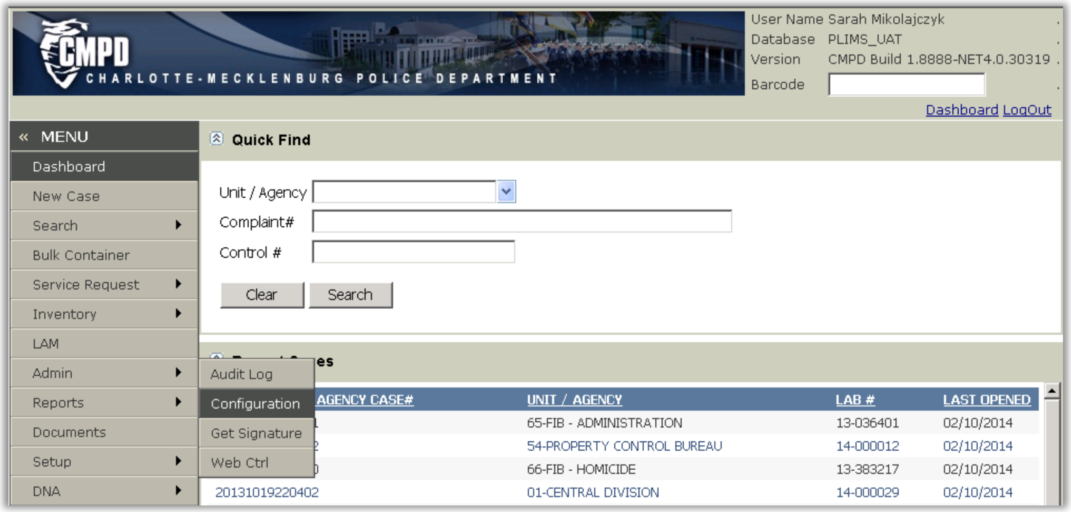
```
Administrator: Command Prompt - sqlplus
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation.  All rights reserved.

C:\Users\11199c>sqlplus

SQL*Plus: Release 11.1.0.7.0 - Production on Mon Feb 10 23:04:55 2014

Copyright (c) 1982, 2008, Oracle.  All rights reserved.

Enter user-name: "11199c"@RMS204
Enter password: _
```

The connection was successful.

```
Enter user-name: "11199c"@RMS204
Enter password:

Connected to:
Oracle Database 10g Enterprise Edition Release 10.2.0.4.0 - 64bit Production
With the Partitioning, OLAP, Data Mining and Real Application Testing options

SQL> _
```

CONNECTION SET IN DATABASE

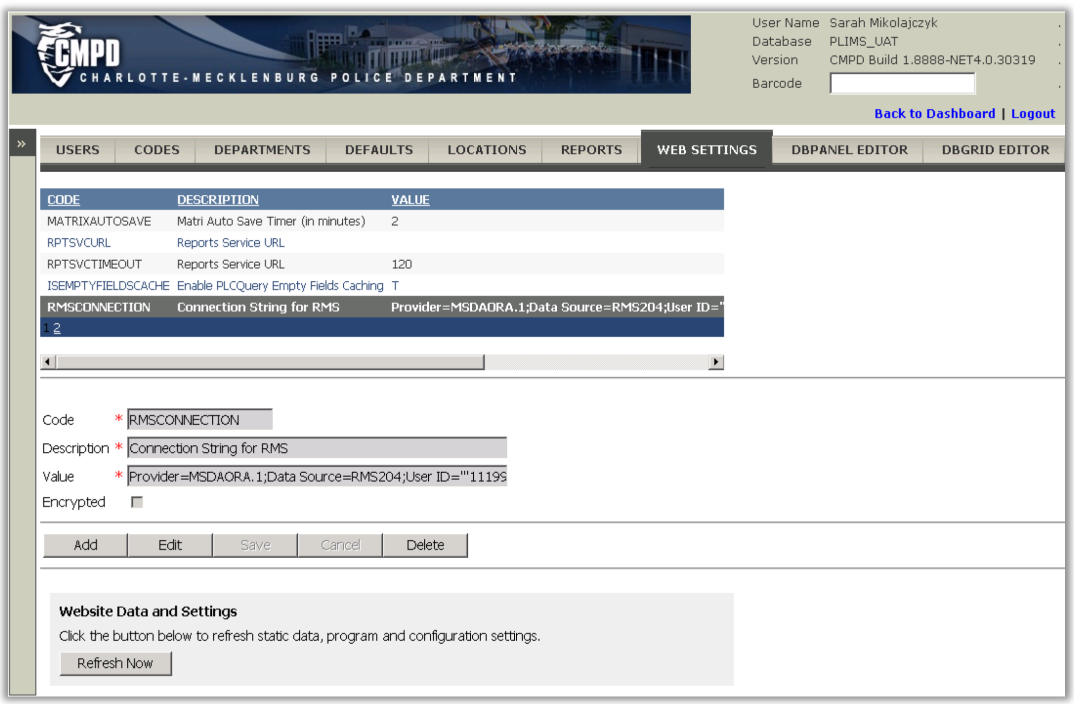
Log in to PLIMS as an administrator and, in the dashboard menu, select the **Configuration** option below **Admin.**



Click the Web Settings tab and select RMSCONNECTION. Click **Edit** and enter the following:

Provider=MSDAORA.1;Data Source=RMS204;User ID='"11199c"';Password=B$u95cRy;Persist Security

NOTE The Data Source should match the tnsnames entry.



RMS CONNECTION FOR PLIMS INVESTIGATOR AUTO-UPDATE

Interface Objective: For PLIMS to keep the case investigator in sync with the investigator of record in KBCOPS.

Description of connection: This connection requires both the tnsnames connection to the RMS database and the direct server connection setup directly on the database. Additionally the “11199c” user needs to be given read/write access to the following table in the RMS database:

PROPERTY_CONTROL_INTERFACE

THE ORACLE CLIENT

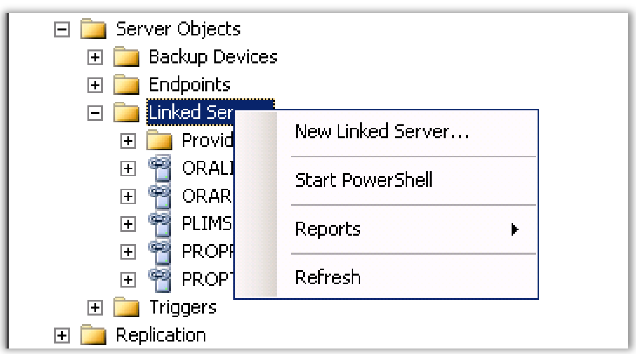
The Oracle Client needs to be installed on the database server 10.66.32.147 (MYRS-CMPDSQL-01). The following is the entry to connect to the test RMS database:

```
RMS204 =
 (DESCRIPTION =
  (ADDRESS_LIST =
   (ADDRESS = (PROTOCOL = TCP)(HOST = 172.16.7.155)(PORT = 1571))
  )
  (CONNECT_DATA =
   (SERVICE_NAME = rms204)
  )
 )
```

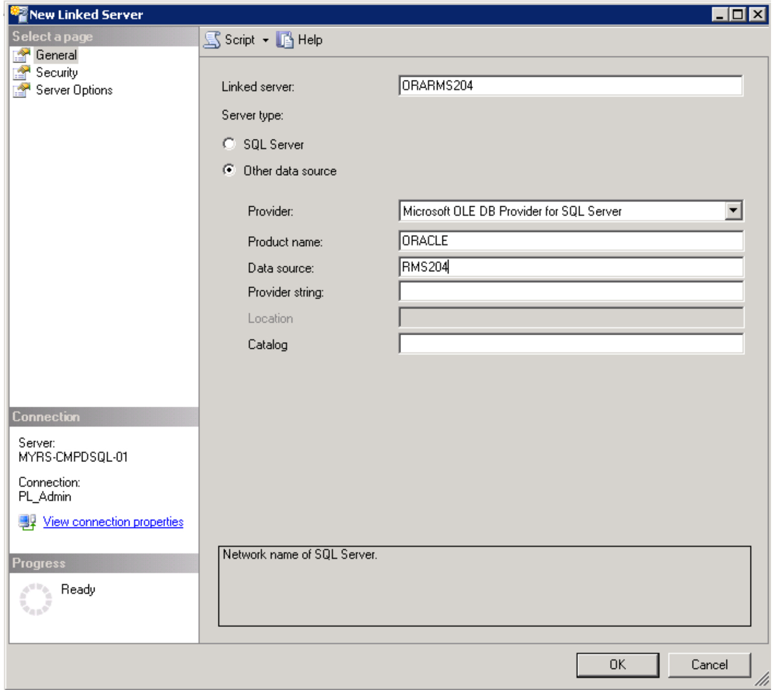
VERIFY ORACLE CONNECTION TO RMS FROM THE DATABASE

On the Development database server 10.66.32.147 (MYRS-CMPDSQL-01) open up SQL Management Studio. Test the connection to the RMS server by creating a server link.

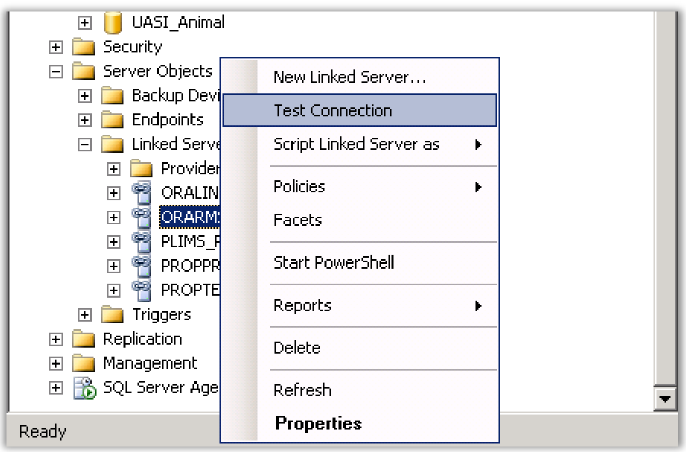
Go to Server Objects/Linked Servers. Right click on Linked Server and select New Linked Server.

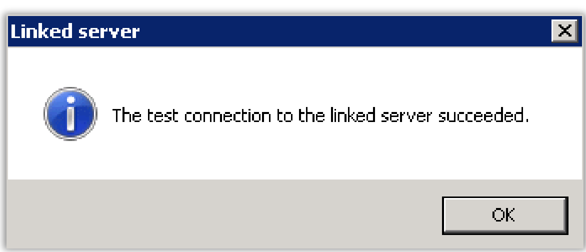


Create the link (e.g., ORARMS204). Click OK.



Right click on the link and select Test Connection.





The following stored procedure needs to be setup on the database:

dbo.SP_UPDATEOFFICER

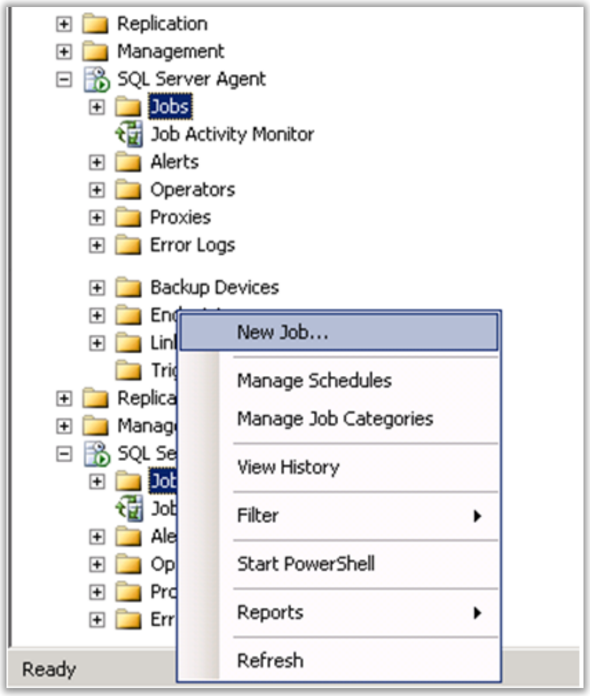
```
GO
/****** Object:  StoredProcedure [dbo].[SP_UPDATEOFFICER]    Script Date:
02/11/2014 00:13:33 ******/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO

ALTER PROCEDURE [dbo].[SP_UPDATEOFFICER]
AS
BEGIN
DECLARE @CMPLNUM VARCHAR(16)
DECLARE @ACODNUM VARCHAR(6)
DECLARE @TRIMACODNUM VARCHAR(6)
DECLARE @ALNAME VARCHAR(20)
DECLARE @AFNAME VARCHAR(15)
DECLARE @AMNAME VARCHAR(15)
DECLARE @ASECT  VARCHAR(100)
DECLARE @ID INT
DECLARE @INVCNT INT
DECLARE @MSG  VARCHAR(255)
DECLARE @STATUS VARCHAR(1)
DECLARE @ANLSTNAME VARCHAR(40)
DECLARE @CKEY INT
DECLARE @SQL1 VARCHAR(1000)
DECLARE @SQL2 VARCHAR(1000)
DECLARE @DPTCODE VARCHAR(9)

DECLARE CUR_RMSUPDATE CURSOR FOR
    SELECT  ID, COMPLAINT_NO,ASGN_CODE_NUMBER,ASGN_LAST_NAME,ASGN_FIRST_NAME,
ASGN_MIDDLE_NAME,ASGN_SECTION
     FROM OPENQUERY (ORARMS204,'select ID, COMPLAINT_NO,
ASGN_CODE_NUMBER,ASGN_LAST_NAME,ASGN_FIRST_NAME, ASGN_MIDDLE_NAME,ASGN_SECTION
     From PROPERTY_CONTROL_INTERFACE  WHERE STATUS_CODE =''N''')

OPEN CUR_RMSUPDATE

FETCH NEXT FROM CUR_RMSUPDATE INTO
@ID,@CMPLNUM,@ACODNUM,@ALNAME,@AFNAME,@AMNAME,@ASECT
  WHILE @@FETCH_STATUS = 0
  BEGIN
    SET @STATUS = 'P'
    SET @CKEY = 0
    SET @MSG = ''
    SET @INVCNT = 0

    SELECT @CKEY = CASE_KEY FROM TV_LABCASE
          WHERE (DEPARTMENT_CASE_NUMBER = @CMPLNUM or DEPARTMENT_CASE_NUMBER =
REPLACE(@CMPLNUM ,'-',''))

    IF @CKEY = 0
      BEGIN
        SET @STATUS = 'E'
```

```
        SET @MSG = 'Complaint# '+ @CMPLNUM + ' Not Found'
      END

    SET @TRIMACODNUM = SUBSTRING(@ACODNUM, PATINDEX('%[^0]%', @ACODNUM),
LEN(@ACODNUM))

    SELECT @DPTCODE = DEPARTMENT_CODE FROM TV_DEPTNAME WHERE DEPARTMENT_NAME =
UPPER(LTRIM(RTRIM(@ASECT)))

    IF @ACODNUM <> ''
    BEGIN
      SELECT @INVCNT = COUNT(*) FROM TV_ANALYST WHERE (ANALYST = @ACODNUM or
ANALYST = @TRIMACODNUM)

      IF @INVCNT =0
      BEGIN
          IF @AMNAME <> ''
            SET @ANLSTNAME= @AFNAME + ' ' + @AMNAME + ' ' +  @ALNAME
          ELSE
            SET @ANLSTNAME= @AFNAME + ' ' +  @ALNAME

          IF LEN(@ANLSTNAME) > 3
            INSERT INTO TV_ANALYST (ANALYST, NAME,DEPARTMENT_CODE) VALUES
(@TRIMACODNUM,@ANLSTNAME,@DPTCODE)

          IF @MSG = ''
          BEGIN
              SET @STATUS = 'E'
              SET @MSG = 'Investigating officer ID ' +  @TRIMACODNUM + ' Not
Found'
          END
      END
    END


    IF @ACODNUM <> '' AND @CKEY > 0
       UPDATE TV_LABCASE SET CASE_MANAGER = @TRIMACODNUM,
INVESTIGATING_AGENCY=@DPTCODE WHERE CASE_KEY = @CKEY

    SET  @SQL1= 'SELECT STATUS_CODE,STATUS_MSG,COMPLAINT_NO from
PROPERTY_CONTROL_INTERFACE where ID = '  + cast(@ID as varchar(10))  + ' and
COMPLAINT_NO = '''''  + @CMPLNUM  + ''''''
    SET  @SQL2= 'UPDATE OPENQUERY(ORARMS204,' + '''' +@SQL1 + '''' + ') set
STATUS_CODE = ''' + @STATUS + ''' , STATUS_MSG = ''' + @MSG + ''''

    exec (@SQL2)
    FETCH NEXT FROM CUR_RMSUPDATE INTO
@ID,@CMPLNUM,@ACODNUM,@ALNAME,@AFNAME,@AMNAME,@ASECT
  END
  CLOSE CUR_RMSUPDATE;
  DEALLOCATE CUR_RMSUPDATE;
END
```

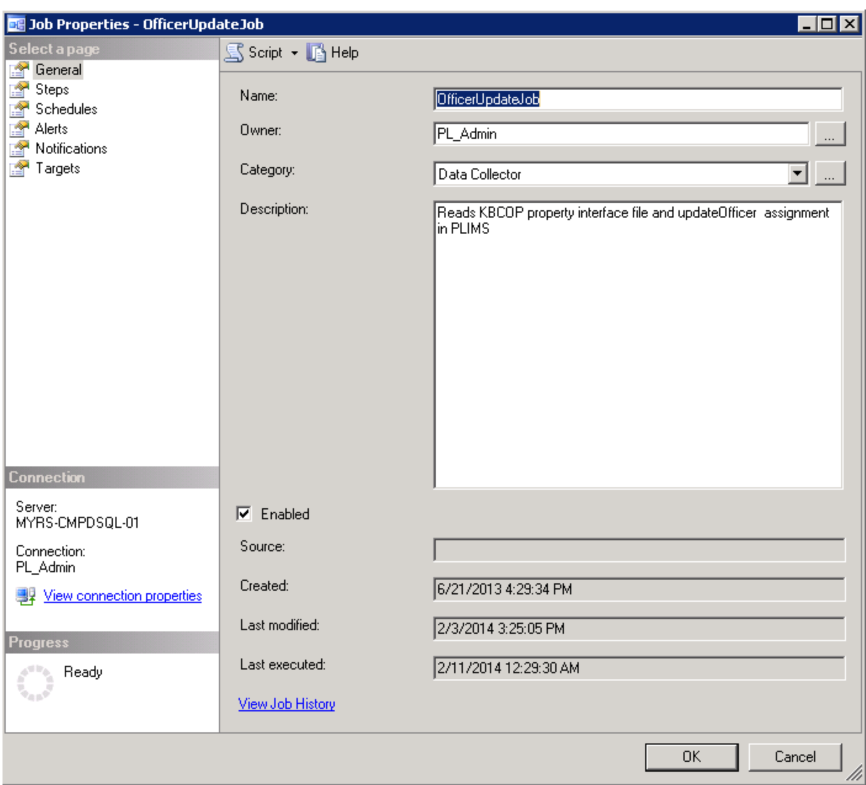
CREATE THE JOB TO RUN ON A CERTAIN TIME INTERVAL

On the Development database server 10.66.32.147 (MYRS-CMPDSQL-01) open up SQL Management Studio.

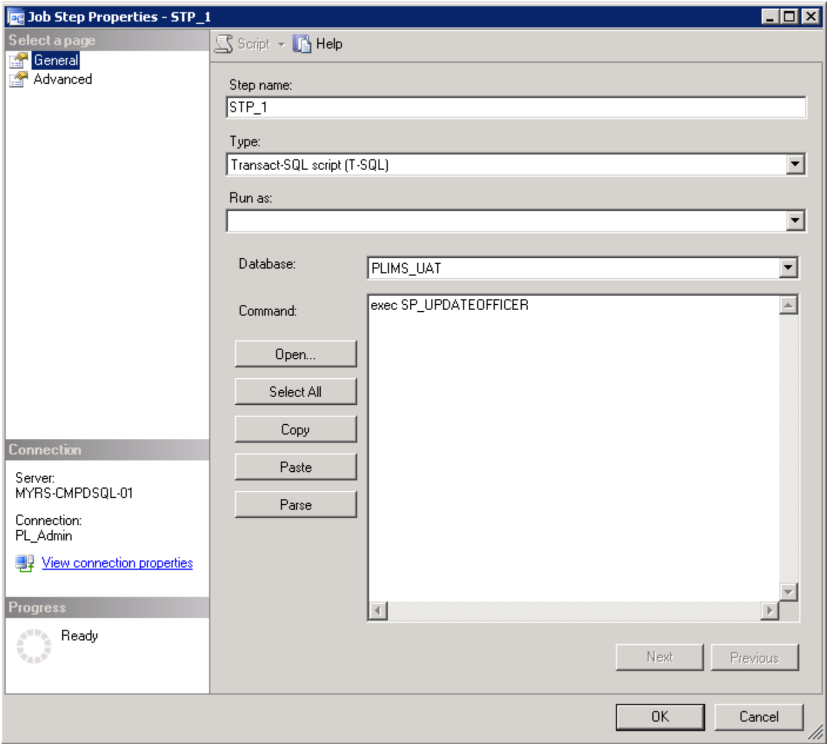
Go to SQL Server Agent and right click on Jobs. Select New Job.



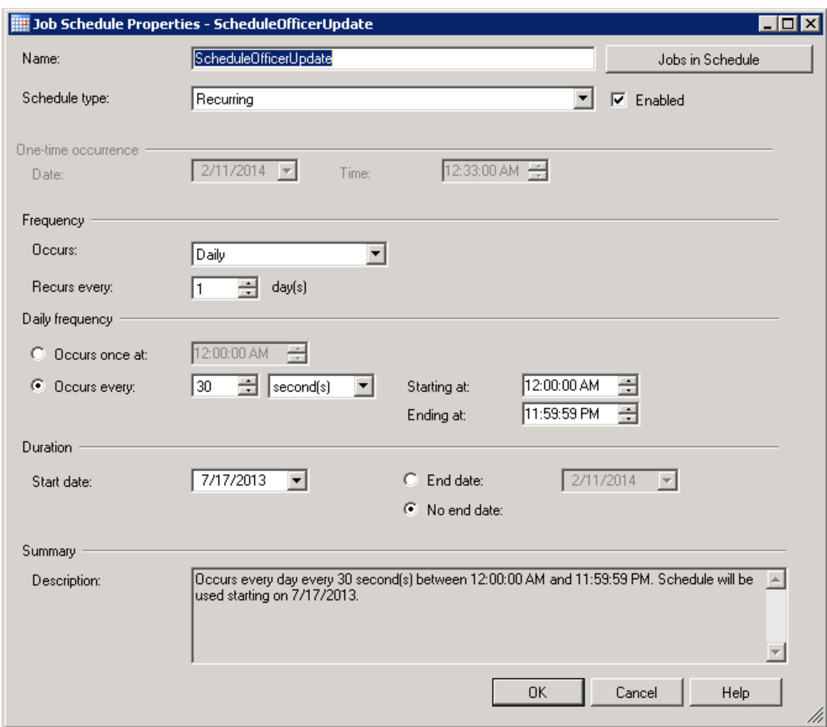
General



Steps



Schedule



To test: Make a change to the investigator in RMS, wait one minute and look in PLIMS for the change.

NOTE If the investigator in RMS is not found in PLIMS, the stored procedure adds that as an inactive user in PLIMS and loads the new name as the investigator of the case.

RMS-PLIMS WEBSERVICE INTERFACE – RMS AND DAPAPERING WEBSITE AND WEB SERVICE INSTALLATION

The following instructions explain how to install the web app and the web service. They also show the connections necessary for the installation.

ADD NEW REPORTS TO THE BARCODE WEB SERVICE (BCWS)

1. Obtain the location of your Barcode Web Service installation. In this example the installation is located at http://192.168.1.13/BPDLIMS/BarcodeService.asmx
2. Install the *srequest.rpt* and *receipt49a.rpt* reports onto the Barcode Web Service. (If already exists then skip.)
    a. Use the most recent version of the report; otherwise, obtain the default *srequest.rpt* and *receipt49a.rpt* packaged with the original documentation for this feature.
    b. Copy *srequest.rpt* and *receipt49a.rpt* onto the directory …\CMPD\Reports\ under the corresponding database you are using, either MSSQL or Oracle (e.g., C:\inetpub\wwwroot\CMPD\Reports\MSSQL).
3. DB Connection: The LIMS database connection name (DBName) used in the BCWS must match the one used in the Web Service installation (see step 5.a in the next section). This can be determined using Connect_Web32.exe.

INSTALL WEB SERVICE

1. Obtain the web service files:

   Web Service: PLimsRMSWS (located in zip file *PLimsRMSWS.zip*)

   Example Located in folder: L:\AGENCIES\NC, CMPD\RMS Project\PLimsRMSWS
2. Copy/unzip the complete PLimsRMSWS directory and files onto target server (e.g., Instance, add Virtual Directory)
    a. Example Installation Structure
        i. Install the zip file into the folder C:\inetpub\wwwroot\
        ii. Make sure the directory structure follows this:
        C:\inetpub\wwwroot\PLimsRMSWS
        C:\inetpub\wwwroot\PLimsRMSWS\bin
        C:\inetpub\wwwroot\PLimsRMSWS\Service References
        C:\inetpub\wwwroot\PLimsRMSWS\Web References
3. If using IIS Manager, Refresh and then <Convert to Application>.
4. **Important:** Make "MainServiceFunctions.asmx" the default document page. Add to Default document: "MainServiceFunctions.asmx" as the first page. In IIS Manager click on PLIMSRMSWS. Then under Home → ISS → open <Default Document>. Right click <Add…> and type *MainServiceFunctions.asmx.*
5. Set the Application Settings (web.config) of the site. The defaults are already set, if keeping these settings then skip. These settings can be changed in IIS → Application Settings.
    a. `DBName:` Set the database connection name to the LIMS db.

       DBName = "CMPD" (default)
       Important Note: This DBName must match the name in step 3 in the previous set of instructions, "Add New Reports to the Barcode Web Service."

b. BarcodeWebServiceURL: Set the URL link in *PLimsRMSWS* to the Barcode Web Service (i.e. this web service invokes another web service).

    i. Parameter = BarcodeWebServiceURL

    ii. Default = http://192.168.1.13/BPDLIMS/BarcodeService.asmx (this will likely need to be changed depending on the location of your barcode web service)

c. The Crystal Reports have configurable parameters defined, they are correctly set to defaults and do not need to be changed (if the following are correct, skip this step.)

    i. PLIMS_BaseReportName_CustodyReport: Default = "CUSTODY" (custody.rpt)

    ii. PLIMS_BaseReportName_ReceiptReport: Default = "receipt49a" (receipt49a.rpt)

    iii. PLIMS_BaseReportName_SRequestReport: Default = "srequest" (srequest.rpt)

6. Test the web service. (If you have IIS : [Manage Application] -> [Browse])

    Note and save the URL that will be used for this web service. It will be needed in the next step "Install Web Application"

7. Usage: From a client app, you may interface directly with the web service PLIMSRMSWS using the method calls.

    a. Test DAPAPER Web Method Call: Using the built in test functions on the web service, do a simple test to see if your installation is functioning correctly. The test functions have a 'Test' as a suffix in the function name. Parameters can be manually typed in the browser.

    b. See document: *PLIMS-RMS Interface Functional Requirements-Specs.docx Section (***SP-001)** on how to use the web method calls.

INSTALL WEB APPLICATION

1. Obtain the web service files:

   Web Service: PLimsRMS (located in zip file PLimsRMS.zip)

   Example Located in folder: L:\AGENCIES\NC, CMPD\RMS Project\PLimsRMS

2. Copy/unzip the complete PLimsRMS directory onto target server (e.g., Instance, add Virtual Directory).

   Example: Create the directory structure into the C:\inetpub\wwwroot\PLimsRMS

3. If using IIS Manager, Refresh and then <Convert to Application>.

4. **Important:** Make sure "default.aspx" is on the Default Document list: Within IIS Manager click on PLIMSRMS. Then under Home → ISS → open <Default Document>.

5. **Important:** If files exist, remove PLCCONTROLS.dll and PLCCONTROLS.pdb from the \bin directory.

6. Set the Application Settings (web.config) of the site. The defaults are already set, if keeping these settings then skip. These settings can be changed in IIS → Application Settings.

   a. `PLimsRMSWebServiceURL`: Set the URL link in *PLimsRMS* to the RMS Web Service that was setup in the previous set of instructions (i.e., this web application invokes another web service).

      i. Parameter = `PLimsRMSWebServiceURL`
         Default = http://192.168.1.13/PLimsRmsWS/

   b. `PLIMS_TimeOutMinutes`: Set the time out number of minutes that a login session will stay active during inactivity until another login is needed. Default = 60 minutes.

   c. One Crystal Reports parameter is defined; it is correctly set to defaults and does not need to be changed (if the following is correct, skip this step).

      i. `PLIMS_BaseReportName_ReceiptReport`: Default = "receipt49a" (receipt49a.rpt)

7. Test the web service. (If you have IIS : [Manage Application] -> [Browse])

8. Usage: Using the link to the server where the app is stored, pass in data to the web app via parameters.

   a. See the next page for information on how to use the web method calls.

Web Application

Once the RMS Web Application is installed onto a server, it can be used to invoke reports to be loaded and displayed in a browser. The application will invoke the RMS Web Service to gather report data. Then it will format and display in html to the browser page.

Web Application Link

The web application is to be installed onto a server (e.g., http://192.168.1.13/PLIMSRMS/). To use the application, send a URL along with parameters in a browser. The URL will contain the path to the server plus parameters.

Parameters

Report parameters will need to be passed to the Web Application via the URL to trigger which report to retrieve and display.

Parameter	Description	Values	Value Desc	Format
Report Name	Possible reports that can be retreived.	PROPEVID	The Property Evidence List Report	RPT=PROPEVID
		LABRPT	The Crime Lab Reports	RPT=LABRPT
Complaint Number	The Complaint number of the report to retrieve	#####	Alphanumeric matching the Lab Department Case Number.	CNO=#####

URL Format:

- <server>/PLIMSRMS/Default.aspx?RPT=<report>&CNO=#####

Examples:

http://192.168.1.13/PLIMSRMS/Default.aspx?RPT=PROPEVID&CNO=20130101-1200-00

http://192.168.1.13/PLIMSRMS/Default.aspx?RPT=LABRPT&CNO=20130101-1200-00

http://192.168.1.13/PLimsRms/?RPT=LABRPT&CNO=20080227-2125-00

Login

The first time the web application is invoked, the user will be prompted for a login. The login access will need to be setup in the LIMS installation and available to the user. The web app will time out the login after a period of time specified in its web application configuration (see installation doc).

WEB METHODS

- `public ReportPacket DAPAPER()`

  This web method retrieves a report for the given Complaint Number and formats/returns the information into a ReportPacket structure.

  ```
  Parameters
  string ComplaintNumber
  ```

  Input: ComplaintNumber : matches to TV_LABCASE.DEPARTMENT_CASE_NUMBER.
  Returns: A ReportPacket class containing the complete list of reports for a ComplaintNumber

- `public byte[] GETREPORT()`

  This web method is used primarily by the RMS Web Application and not typically to be called directly. It retrieves a report for the given Complaint Number and returns a PDF report in a set of raw bytes. It can be viewed in a PDF view / or browser.

  Parameters

string UserId	User ID in LIMS
string Password	User Password in LIMS
string ReportName	Custody or Lab Report(receipt49a or LABRPT)
string ComplaintNumber	Number matching a DEPARTMENT_CASE_NUMBER in the Lims system LABCASE
out ReportPacket TheReportPacket	Returns the ReportPacket structure for the report
out int ErrCode	An error number(0=No Error)
out string ErrMsg)	Cooresponding Description of the Error

Returns: The Raw PDF Bytes of the requested report

PARAMETER MAPPING

Sample:

```
<ReportPacketItem>
    <ReportType>Custody</ReportType>
    <Section/>
    <SRMasterKey>0</SRMasterKey>
    <RequestedDate/>
    <RequestedBy/>
    <LabReportNumber>0</LabReportNumber>
    <Data>JVBERi0xLjcgCiXi48/TIAoxIDAgb2JqIAo8PCA
    <Msg/>
</ReportPacketItem>
```

TAG	Description	Notes
ReportPacket	– The main structure (soap message) returned by Web Method : DAPAPER()	A packet will contain: 1 Custody report. 1 Receipt report N number of Service Request reports M number of Lab Reports
ReportPacketItem	– Each individual Report within the ReportPacket	
ReportType	Custody, Receipt, ServiceRequest, LabReport	
Section	Only used by LabReport type	Blank for other types TV_LABASSIGN.SECTION
SRMasterKey	Only used by ServiceReequest type	Blank for other types
RequestedDate	Only used by ServiceReequest type	Blank for other types TV_SRMASTER.REQUESTEDDATE
RequestedBy	Only used by ServiceReequest type	Blank for other types TV_SRMASTER.REQUESTEDBY
LabReportNumber	Only used by LabReport type	0 for other types; TV_LABASSIGN. REPORT_NUMBER
Data	Raw PDF data in bytes	
Msg	Empty or contains an error message	
Msg	There is also a top level error message for the whole ReportPackt.	

```
 public class ReportPacket
 {
     public List<ReportPacketItem> ReportList = null;
     public string Msg = "";


     public ReportPacket()
     {
         ReportList = new List<ReportPacketItem>();
     }


     public void Add(PDFReport thePDFReport)
     {
         if (thePDFReport != null)
         {
             ReportPacketItem item = new ReportPacketItem();
             item.ReportType = thePDFReport.ReportType;
             item.Section = thePDFReport.Section;
             item.SRMasterKey = thePDFReport.SRMasterKey;
             item.RequestedDate = thePDFReport.RequestedDate;
             item.RequestedBy = thePDFReport.RequestedBy;
             item.LabReportNumber = thePDFReport.LabReportNumber;

             if (thePDFReport.Data != null)
                 item.Data = (byte[])thePDFReport.Data.Clone();
             item.Msg = thePDFReport.Msg;
             ReportList.Add(item);
         }
     }


     public void DemoAdd(string ReportType, byte[] data)
     {
         ReportPacketItem item;

         item = new ReportPacketItem();
         item.ReportType = ReportType;
         item.Section = "DNA";
         item.Data = (byte[])data.Clone();
         item.Msg = "Successful";
         ReportList.Add(item);
     }
 }

public class ReportPacketItem
 {
     public string ReportType="";
     public string Section="";
     public int SRMasterKey = 0;
     public string RequestedDate = "";
     public string RequestedBy = "";
     public int LabReportNumber = 0;
     public byte[] Data = null;
     public string Msg = "";

     /* Constructor */
     public ReportPacketItem()
     {
     }
 }
```

CONFIGURING CHEMSTATION SEQUENCE FILE IMPORT

This section explains how to enable the ChemStation software to import sequence.xml files. Natively the ChemStation software only imports csv files.

<u>ChemStation B</u> (or other version with ChemstationPlus XML Interface)

Step 1: Create the XMLSEQ folder.

A. From a command prompt or windows explorer, create the following folder:

C:\labsave\XMLSEQ

Step 2: Enable the XML import function in the chemstation.ini file.

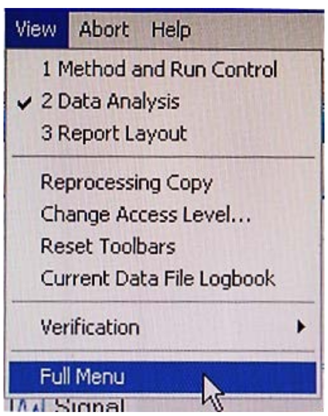
A. Locate the chemstation.ini file in c:\windows and add the following line directly under the [PCS] section heading:

XMLEnableImport=1

B. Locate the [PCS,1] section (for instrument #1) and add the following line directly under the heading:

XMLImportPath$=C:\labsave\XMLSeq

Step 3: Restart the ChemStation program and select “Full Menu” from the data analysis “View” menu.

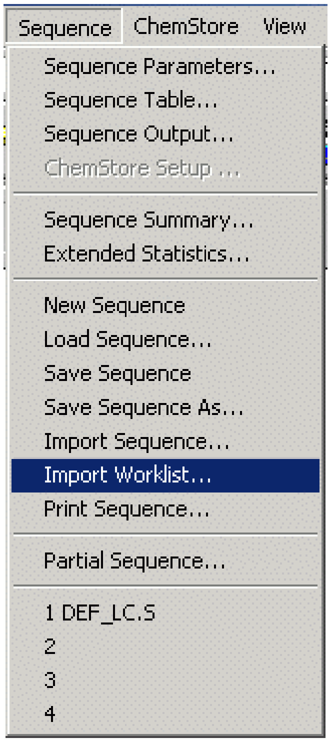


Step 4: Verify the Import Worklist option is available.

A. Switch back to Method and Run Control

B. Click on the sequence menu

C. C: Click on the Import Worklist (Front) Menu item. When you do this, a file open dialog should display allowing you to select a file from the c:\labsave\XMLSEQ folder.



Step 5: Change the network connection priority in Windows.

Additionally the ChemStation uses two network cards. One connects the device to the pc and the other connects the pc to the website. Follow the steps in this article to set priority of the network connections so that both work properly:

http://support.microsoft.com/kb/2526067

NOTE For information on configuring the export file from ChemStation to PLIMS refer to CMPD Chemstation documentation.