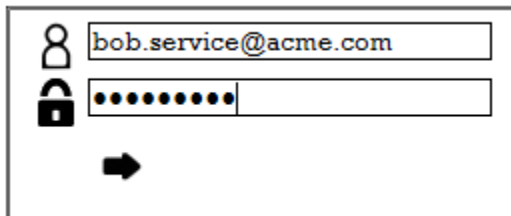# PRŌMIUM

Introduction to ClientConnect

ClientConnect is a web portal which provides laboratory clients with access to information related to submitted samples. Using ClientConnect, clients can check sample analysis status, download data, search for results, and review methodologies.

This document is intended to help laboratory clients use the ClientConnect web portal. It is written in a way that assumes that the client has already established specific project parameters with the analytical laboratory that is associated with the ClientConnect portal. The information provided in this document is meant as a general overview of the features found in ClientConnect and may not be comprehensive for each specific laboratory configuration.

Login

On the login page, enter the user name and password that have been provided by the laboratory. Click on the arrow to continue.

ClientConnect Login page

Main Page

Once logged in there are four main views in the banner located at the top of the page. The choices are Projects, Documents, Search, and Methodology.

ClientConnect main page

Projects Page

The projects page displays a summary of all projects accessible to the user account that is logged in. The page lists each project in a row that includes summary information for that project.

Project page

Project Filters

The list of Projects that appear can be limited by applying date ranges to show only select datasets. A filter can first be applied to determine the amount of data to return.

Project page, Navigational ranges

Navigational ranges that can be applied are:
- **Active:** Displays any project that has had a work order received within the time specified through the filter (30, 60, or 90 days).
- **Custom:** Displays any project that has had a work order received within a custom date range. Custom dates are inclusive. In other words if it is desired to view work received in January 2015 the custom date range would be 1/1/15 – 1/31/15.
- **Pending:** Displays projects which have no work orders posted.
- **All Active:** Displays all projects except for those that are considered Pending.
- **All:** Displays all projects, active and pending, without regard to the work order received dates.
- **Find WO:** Displays information for a particular work order. Enter a work order number and click on the search icon.

To filter rows by a specific piece of information, type the keyword(s) into the Row Filter field.

Project page, Row filter

Projects menu

The Project grid contains the following columns:

- **#:** The sequential number assigned to each row
- **Project:** The client project name.
- **WOs:** The number of work orders related to the project. Can expand to view the specific work orders and information related to them.
- **Documents:** Shows documents associated with the project. Can expand to view any documents that exist.
- **Analyses:** Analyses associated with project. Can expand to view the list.
- **Submissions:** The number of submissions through the EnviroChain EA feature (Ec). Can drill down to view individual submissions. **Note**: This column will only appear if it has been enabled for the user account.
- **Description:** The Project description.
- **Location:** The Project location.
- **Lab Manager:** The laboratory project manager assigned to the project.

On the Projects page, datasets can be expanded for detailed viewing of information related to Work Orders, Documents, Analyses, and Submissions.

# ▲	Project ▲	WOs ⬍	Documents ⬍	Analyses ⬍
1	Morganfield Split	2 ▶	1 ▼	2 ▲

Project page, Arrow icons

There are three types of arrow icons that can exist in the data row; right, down, and up. Clicking on the right arrow in the WOs column will open the Work Orders grid. Clicking on the down arrow will expand and provide additional information through a secondary grid underneath the project data grid. Clicking on the up arrow will collapse the expanded information.
In the column header there exists up/down arrows that can be used to sort the data rows in either ascending or descending order.

Projects Work Orders (WOs) menu

When the Work Order grid has been opened from the Projects page, information related to individual work orders associated with the project can be seen. To return to the main Project page, click on 'Projects' in the page's main banner. The information on the Work Order grid can also be expanded to provide details related to samples, analytical results, and documents.

☐	WO #	Samples	Results	Documents	Project Number	Status	Sampled Date	Received Date	Status Date
☐	P507007	1 ▼	▼	🔍 ▼	South Treatment Plant	Received	07/22/2015	07/23/2015	07/23/2015
☐	P507008	1 ▼	▼	🔍 ▼	Pumping Station 01	Received	07/20/2015	07/23/2015	07/23/2015

Project page, expanded Work Order view

The Work Orders grid contains the following fields:

- **WO #:** The work order number assigned by the laboratory.
- **Samples:** The number of samples in the work order. Can expand to show details.
- **Results:** An arrow will appear if results are available for viewing. Can expand to show details.
- **Documents:** Documents associated with the work order. Can expand to show details.
- **Project Number:** The project number that is associated with the work order.
- **Status:** Current Status of the work order.
- **Sampled Date:** The minimum sampled date of samples associated with the work order.
- **Received Date:** The date that the samples were received at the laboratory.
- **Status Date:** The date that the status was last changed

Work Order Samples menu

When the Samples menu has been expanded from the WOs grid, information related to individual samples can be seen.

🔁	#	Sample	Matrix	Sampled	Received	Analysis	TAT	Status	Status Date
	01	BW EFF	Water	05/02/2016	05/02/2016	Al (Aluminum) - 200.7 - Total	10	Reported	05/18/2016
						Conductivity	10	Reported	05/18/2016
						Dissolved Solids	10	Reported	05/18/2016

Expanded Work Order page, expanded Sample view

The Sample grid contains the following fields:

- **Sample:** The sample name provided to the laboratory (the Client sample name)
- **Matrix:** The sample matrix
- **Sampled:** Date the sample was collected
- **Received:** Date the sample was received by the laboratory
- **Analysis:** Specific analysis performed on the sample
- **TAT:** Turn Around Time associated with the analysis
- **Status:** Current Status of the analysis
- **Status Date:** The date that the status was last changed

There will be information provided for each analysis contained within a Work Order. The information presented can be exported to an xls spreadsheet file by clicking on the Export icon ![Export icon] that appears in the first column header.

To close the expanded menu, select the up arrow icon located in the Samples column, next to the number of samples in the Work Order.

Work Order Results menu

When the Results menu has been expanded from the WOs grid, information related to individual sample analysis results can be seen. This can be opened either at the same time that the Sample column information is expanded, or independently. When the Results and Sample menus are both opened concurrently, they will open as two separate tables.

	#	Sample	Analysis	Matrix	Analyte	Units	Rep Limit	Result	Qualifiers
	01	BW EFF	Al (Aluminum) - 200.7 - Total	Water	Aluminum	mg/L	0.0250	0.470	
			Conductivity	Water	Specific Conductance	umhos/cm		0.00	
			Dissolved Solids	Water	Dissolved Solids	mg/L	10.0	300000	

Expanded Work Order page, expanded Results view

The expanded Results grid contains the following fields:

- **#:** Sample number assigned by the laboratory.
- **Sample:** Sample name provided to the laboratory (the Client sample name).
- **Analysis:** The analysis name used by the laboratory.
- **Matrix:** The sample matrix.

- **Analyte:** The analyte of interest in the sample provided.
- **Units:** The units associate with the result and reporting limit.
- **Rep Limit:** The Reporting Limit.
- **Result:** The analytical result. Values above the reporting limit will be highlighted in yellow.
- **Qualifiers:** Laboratory qualifiers that have been associated with the analyte. To view the text of the qualifier, hover the mouse over the qualifier abbreviation.

All information from the expanded menus can be exported to an xls spreadsheet file by clicking on the Export icon that appears in the first column header. To close the expanded menu, click on the up arrow icon located in the Results column.

Work Order Documents menu

When the Documents menu has been expanded from the WOs grid, documents associated with the selected work order can be seen. The name of the document, date, and file size are shown in the expanded view. A document can be opened or saved by clicking on the document name.

# ▲	Project ▲	WOs ⬍	Documents ⬍	Analyses ⬍	Submissions ⬍	Number ⬍	Description ⬍	Location ⬍	Lab Manager ⬍
1	Morganfield Split	8 ▶	1 ▲	5 ▼	18 ▼ E꜀	[none]			Mike Basterfield

Name	Date	Size
Project Info.pdf	04/10/2014 00:00	42 KB

Work Order page, Documents expanded menu

Work Order options

When the Work Order menu has been expanded from the Projects page, the main banner of the page will show some options that are not available on the Project main page.

⟳ 07/24/2015 10:36:55

Samples ▼ ▲ Results ▼ ▲ ☐ Flag Limits ☐ Regulatory Limits

Received in last ○ 30 days ○ 60 days ○ 90 days ● All ○ Custom

Work Order view options

Available options on the Work Order page are:

- **Refresh:** Clicking on the circular arrow will refresh the data on the page. The date and time of the last refresh are indicated next to the arrow.
- **Data Export:** Clicking on this icon will open a new page that allows the user to export data from ClientConnect to an .xls spreadsheet file. To export data from the Export page, select an export format from the drop-down menu. The choice list contains several default formats. A custom template can be created to include whatever available information is desired. To create a new export format:
    1. Click on the 'Add' icon located at the far left hand side of the page.
    2. Enter a name for the format and select 'OK'.
    3. Put a check in the data fields that should be included.
    4. Click on the + symbol to expand the table fields.
    5. Once the fields have been selected, click on the 'Save and run this export setup' icon located on the field selection screen.
- **Sample History:** Clicking on the Sample History icon will open a new page that allows the user to filter the historical results based on specific criteria (sampled date, sample name, analysis, and analyte). Once the criteria has been selected, click on the arrow to view the results. The History view shows the Analysis, Analyte, Units, a graph representing the analytes on each date, and the sample results. Statistically values for the Min, Average, and Max will also be presented.
- **Samples Expand All:** This option will expand all samples contained in all the Work Orders.
- **Results Expand All:** This option will expand out all Results details for all samples in all of the Work Orders.
- **Flag / Regulatory Limits:** Putting a check in either of these boxes will show the limits if they have been set up by the laboratory. If the result is above the limit then name of the limit and its value will be highlighted in red.

	Sample	Analysis	Matrix	Analyte	Units	Rep Limit	Reg Limits	Result	Qualifiers
	03-MW-3	BTEX	Water	Benzene	ug/L	0.700 **Flag 1: 10**	**MTCA: 5.00**	45.0	D-02
	03-MW-3	BTEX	Water	Ethylbenzene	ug/L	0.700		ND	
	03-MW-3	BTEX	Water	Toluene	ug/L	0.700 Flag 1: 10		1.00	J
	03-MW-3	BTEX	Water	Xylenes (total)	ug/L	0.700		ND	

Work Order results page, flag and regulatory limits example

Documents Page

The Documents page summarizes documents associated with the client account of the logged in user. From this page documentation files can be opened or saved.

Type	WO #	Project	Name	Date	Size
Client			Bid for New Project.pdf	04/25/2014 00:00	42 KB
Client			Client Secrets.pdf	04/04/2014 00:00	42 KB
Client			Project Proposal.pdf	05/19/2014 00:00	42 KB
Client			Quarterly Review 1Q2013.pdf	04/12/2014 00:00	42 KB
Client			Sammaches.pdf	05/01/2014 00:00	42 KB
Client			Summary of Work To Date 12312012.pdf	05/09/2014 00:00	42 KB
Invoice			1200001.pdf	04/10/2014 16:49	54 KB
Project		Morganfield Split	Project Info.pdf	04/10/2014 00:00	42 KB
Work Order	M310001	Morganfield Split	M310001.pdf	05/06/2014 00:00	21 KB
Work Order	M310004	Morganfield Split	M310004.pdf	05/06/2014 00:00	21 KB
Work Order	M310004	Morganfield Split	M310004_COC.zip	05/06/2014 00:00	21 KB

Documents page

The Documents page contains the following information:
- **Type:** The document type.
- **WO#:** Work Order number, if applicable.
- **Project:** The associated Project, if applicable.
- **Name:** Document name.
- **Date:** Date that the document was generated.
- **Size:** Document size.

The documents page has the same date and row filters as seen on the Projects. It also has a date filter for the File.

To download a document, click on the document name and a prompt will appear to open or save the file.

Search Page

The Search page is used to query results that are filtered based on a variety of filters (projects, sampled dates, sample names, analyses, and analytes. The data can be exported, viewed on the sample history page, or viewed on the documents page.

This initial list of filter criteria is loaded for the projects that appear on the Projects page based on the date filter that was selected.

Choose the criteria that you desire and enter the sampled date range.

If no items are selected for a particular criteria then all items will be used and you will see "(All)" under the criteria header. If an item is selected and you want to unselect it, hold down the Ctrl key and click on it again to un-highlight it.

If you would like to search by Sample Alias or Sample RegID instead of by Sample Name, click on the ⇆ icon. Note: the Sample Name is a mandatory field while Alias and RegID are not. Searching by these fields will only be effective if the laboratory has entered them in the LIMS.

After selecting all the search criteria, click on the "Sample history", "Data export", or "Documents" icon.

Data Export

After selecting the search criteria on the main Search page, click on the "Sample history" icon ![icon] to start the data export process. Standard and customizable export formats can be selected here. This document does not cover the setup of these export formats.

Sample History

After selecting the search criteria on the main Search page, click on the "Sample history" icon ![icon] to query and return the data.

Work order count: 1								
Sample dates	Sample names ⇄ 1 / 1	Analyses (All)	Analytes (All)					
Analysis	**Analyte**	**Units**		01/26/2015 P501009-01RE1 WMD-1 SAMPLED 1/26/15	01/26/2015 P501009-01 WMD-1 SAMPLED 1/26/15	**Min**	**Avg**	**Max**
Ag Diss ICP 200.7	Silver	ug/L			<55	43	43	43
TPH-G	1,1,1,2-Tetrachloro-2,2-Difluoroethane	mg/L			<0.0500	0	0	0
TPH-G	Gasoline	mg/L	✉	0.0550	0.160	0.055	0.108	0.16
TPH-G	TPH as Gasoline	mg/L	✉	<0.0500	0.150	0	0.075	0.15

If you would like to expand the search criteria to a larger group of work orders, close this screen and start over at the main Search page. If you would like to change the query criteria for this group of work orders then click on the "Show option" icon ![icon] .

Work order count: 1				
Sample dates	Sample names ⇄ 1 / 1	Analyses (All)	Analytes 1 / 7	➡
01/01/2014 01/01/2016	WMD-1 sampled 1/26/15	Ag Diss ICP 200.7 Pb Total ICP 6010 TPH-G Tracking only	1,1,1,2-Tetrachloro-2,2-Difluoroethane 4-Bromofluorobenzene a,a,a-Trifluorotoluene Gasoline Silver TPH as Gasoline Ytterbium	

Select the new criteria and then click on the arrow ![arrow] to query and return the data.

On the Sample history screen you can click on the icon to export the data to Excel. Note: the Excel file will contain column headers that include the Sampled date, Labnumber, and Sample Name. These column headers will need to have the column height and row height adjusted to see all of the fields.

The sample results can be plotting by click on the chart icon. Note: it works best to select one sample (or multiple equivalent samples) at a time since they are all plotted together. For example you could choose MW-1, MW 1, and MW1 but it would not make sense to choose MW-1, MW-6, and MW-77.

Documents

After selecting the search criteria on the main Search page, click on the "Documents" icon to quickly navigate to the Documents page and bring up related documents.