cobas® infinity central lab

Quick Reference Guide

Publication version 2.0

Software version 3.02

Publication Information

Publication version	Software version	Revision date	Change description
1.0	3.0	March 2019	First edition
1.1	3.01	May 2019	No changes
2.0	3.02	October 2019	Information on the EU GDPR Compliance guide available for operators of the **cobas**® **infinity** central lab. Data privacy information (15)

Revision history of Quick Reference Guide

Edition notice

This publication is intended for operators of the **cobas**® **infinity** central lab.

Every effort has been made to ensure that all the information contained in this publication is correct at the time of publishing. However, the manufacturer of this product may need to update the publication information as output of product surveillance activities, leading to a new version of this publication.

Where to find information

The **User Assistance** contains all information about the product, including the following:

- Safety
- Routine operation
- Configuration information

The **User Guide** focuses on routine operation. The chapters are organized according to the normal operation workflow.

The **Quick Reference Guide** focuses on routine operation for selected tasks.

⚠ General attention

To avoid incorrect results, ensure that you are familiar with the instructions and safety information.

- Pay particular attention to all safety notices.
- Always follow the instructions in this publication.
- Do not use the software in a way that is not described in this publication.
- Store all publications in a safe and easily retrievable place.

Training

Do not carry out operation tasks or maintenance actions unless you have received training from Roche Diagnostics. Leave tasks that are not described in the user documentation to trained Roche Service representatives.

Screenshots

The screenshots in this publication have been added exclusively for illustration purposes. Configurable and variable data, such as tests, results, or path names visible therein must not be used for laboratory purposes.

Warranty

Any customer modification to the system renders the warranty or service agreement null and void.

For conditions of warranty, contact your local sales representative or refer to your warranty contract partner.

Always leave software updates to a Roche Service representative, or perform such updates with their assistance.

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Feedback

Every effort has been made to ensure that this publication fulfills the intended use. All feedback on any aspect of this publication is welcome and is considered during updates. Contact your Roche representative, should you have any such feedback.

Disclaimer

This publication may contain information and references to products that may not be available in your country or sold by Roche Diagnostics. This publication makes no claims regarding the use or performance of those products. Selected third-party products are available for use with **cobas® infinity** central lab.

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Intended use

The **cobas® infinity** central lab software is intended to be used for:

- the configuration and connectivity management of instruments and software systems
- the management of data regarding
  - Samples
  - Technical validation including automatic release
  - Quality control (both qualitative and quantitative)
  - Test results and their entry (offline workplaces)
- the management and storing of information, such as
  - Samples Archiving Storage information
  - Rule engine for technical validation
  - Notifications from any part of the system
  - Reagent and Calibrator management
  - Turn Around Time management
  - Production statistics

In addition to the above intended use, the **cobas® infinity** central lab software is intended for:

- the management of data regarding
  - Order Data
  - Patient Data
  - Medical Validation support
  - Result Consolidation and Reporting
  - Billing support
- the management and storing of information, such as
  - General statistics (Data Warehouse)
- Microbiology workflows and data for (Microbiology module):
  - Human samples

Safety classifications

The safety precautions and important user notes are classified according to the ANSI Z535.6 standard. Familiarize yourself with the following meanings and icons.

These symbols and signal words are used for specific hazards:

⚠ WARNING!

Warning...

- ...indicates a hazardous situation which, if not avoided, could result in death or serious injury.

⚠ CAUTION!

Caution...

- ...indicates a hazardous situation which, if not avoided, could result in minor or moderate injury.

NOTICE!

Notice...

- ...indicates a hazardous situation that, if not avoided, may result in damage to the system.

Important information that is not safety relevant is displayed as the following icon:

Tip...

...indicates additional information on correct use or useful tips.

System safety information

Roche Diagnostics has established a series of recommendations with the aim of allowing the user to work with the software under safe conditions and guaranteeing the correct operation and proper performance of the communication network in which this product has been installed.

Read the following recommendations carefully for the correct operation of the software.

Security

⚠ WARNING!

Secure infrastructure

Risk of privacy violations.

- A secure infrastructure must be established for the software network and security policies must be defined to address potential problems or system failures.
- Access is controlled by a login. Every access to the software is registered and logged, including the unsuccessful ones.
- Pay special attention when configuring the number of logon attempts, the password expiry period, and session management.

⚠ WARNING!

Enabled security parameters

- All security parameters (profiles, access restrictions, etc.) are enabled by default. Remember that disabling security parameters may lead to potentially major risks, e.g. unqualified staff may change instruments or system configurations, or unauthorized users may access confidential information.

UPS

⚠ WARNING!

UPS usage and software shutdown

Risk of data becoming lost or corrupted in the event of a power failure

- It is strongly recommended to use a UPS and to perform regular UPS maintenance.
- It is strongly recommended to keep the journaling feature activated.
- There should be a standard procedure to shut down the software. You must exit the software before shutting down the computer on a daily basis. Having a UPS that can perform a safe shutdown installed mitigates the risk of data loss due to power failure.

⚠ CAUTION!

UPS usage

Risk of data loss in the event of a power failure

- It is strongly recommended to use a UPS.
- It is strongly recommended to keep the journaling feature activated.

User settings

⚠ WARNING!

Restricting access to critical functions

Risk of confidential information being accessed

- It is recommended to grant users the minimum rights necessary to perform their tasks to protect confidential data and configuration items in the database.

⚠ WARNING!

Access to the software and user accounts

- Access to the software should only be granted to users who have been trained and assigned a user name and password. The password must be confidential and must comply with the usual security principles. It must be changed periodically to prevent unauthorized parties from gaining access.
- There must be one account per user. Do not create generic user accounts to be used by more than one person. Create a different account for each user, even if they have the same access rights.
- It is recommended that you develop a Standard Operating Procedure (SOP) to ensure that only qualified staff access the software.

⚠ WARNING!

Passwords, access, and system shutdown

- For security reasons and for patient confidentiality, all users must exit the software or lock their computer before leaving their workplace.
- It is recommended to correctly configure the automatic log-off time.

⚠ CAUTION!

System performance

Risk of delayed results

- To ensure the operation of the system at full capacity, avoid connecting more users or instruments than your infrastructure supports.

System configurations

The preconfigured settings in the system must only be used as a reference. It is recommended that they are not used as default settings since they should be modified to suit the system and the health center requirements.

General

⚠ CAUTION!

Failure to understand the software icons and symbols

Delay in the processing of an order, or the generation of user errors through poor understanding of the software

- Get accustomed to the iconography used in the software prior to first usage.
- Hover over icons to display the icon tooltip, or optionally, use the User assistance shortcut (F1).

⚠ WARNING!

Regional settings

- Make sure that the configuration of the software matches the regional settings and the local requirements.

⚠ CAUTION!

Servers and software performance

Risk of delayed results

- Use servers that are correctly dimensioned to the needs of your installation to guarantee the best performance of the software.
- It is recommended to configure the servers using a high availability and data redundancy system. The existence of a second server prevents data loss in the event of severe or critical failures in the system.

⚠ CAUTION!

Alarms on validation screens and reports

Risk of incomplete results that could lead to a wrong diagnosis

- To prevent users from validating results without taking into account important information, always configure alarms for validation screens and reports.

⚠ CAUTION!

Barcodes

Risk of delayed results

- It is strongly recommended to have appropriate Standard Operating Procedures (SOP) to avoid an incorrect handling of tubes.
- It is recommended to use barcodes for tubes and trays to easily identify and locate samples.

All the changes made in the software are recorded using an audit trace.

⚠ CAUTION!

Errors in identification of orders, tubes or patients

Wrong results or delayed results.

- If the archived database is not available, do not use the local database.

Backups and updates

⚠ WARNING!

Backups and updates

- Before updating the software, make backups of all databases and system configurations.
- After updating the software, check the proper functioning of all system features, especially those that require a greater complexity of configuration.

Instruments and reading devices

⚠ WARNING!

Repeated values

Results may be misinterpreted if instruments do not show the time when results were sent, or if the same results are received for the same test with the same timestamp.

- Keep in mind that, in this case, results could be repeated simply due to data being transmitted twice and not because a test was repeated.

Reading devices

Risk of results being misinterpreted

- It is recommended that you use reading devices (optical readers, barcode readers, card readers, etc.) to take results. Check the reading devices are operating correctly before using them in real environments.

Results

⚠ WARNING!

Result format

Risk of results being misinterpreted or wrong results

- To prevent the software to misinterpret results, do not use separators for thousands when entering results. Only decimal separators must be used.
- Ensure that instruments and hosts are also configured to not use separators for thousands.

Patient management

⚠ WARNING!

Entering patient data manually

Risk of incorrect or delayed results

- Take special care when entering data manually.

⚠ WARNING!

Patient merging

Risk of unintentional data loss or patient demographics being confused with another patient's demographics

- Merging patient demographics to form a single patient record is a potentially dangerous action and must only be performed by qualified staff.

Order management

⚠ CAUTION!

Order IDs

Risk of patient results being confused with another patient's results.

- The system allows you to define the fields forming the order ID (fixed texts, dates, prefixes...) and the modules where they are used. To enter and retrieve orders correctly, remember to use the specified format for the module you are in.

⚠ CAUTION!

Reusing tube IDs

Risk of results being confused.

- It is recommended that you define a different tube ID for each sample.
- Tube IDs can only be reused once the maximum time period configured in the automatic order closing parameter is exceeded, otherwise patient information and results could become confused.

⚠ CAUTION!

Conflicting TubeID with another open order

New order rejection, with original container deactivated

- Avoid potential errors in container identification such as poor labeling or configuration errors in the OrderID and TubeID settings that could lead to the same TubeID applied to different orders.
- If the archived database is not available, do not use the local database.

⚠ WARNING!

Entering erroneous order demographic data

Risk of delayed or wrong results

- Ensure that the mandatory demographic fields are entered correctly.

⚠ CAUTION!

Deleting orders

Risk of results and data being confused with results and data belonging to another patient.

- When deleting an order, all samples and tubes belonging to this order must also be removed from the laboratory and the system.

Work areas

⚠ CAUTION!

Performing tests

Risk of delayed results due to tests not being performed

- It is recommended to check the status of the order or tests in the work area.
- To ensure that all tests are performed, it is recommended to print a worklist and compare it with the order in the software.

⚠ WARNING!

Manual result entry

Risk of wrong results

- Verify that tests are assigned to the correct instruments.
- Apply correct manual assignation of test location; with awareness of permissions required for result editing/viewing dependent on location.

⚠ CAUTION!

Manual result input and result format

Erroneous results

- Use codified results to avoid incorrect or non-existent data from manual or automatic input.

⚠ WARNING!

Repeating or deleting results by mistake

Risk of delayed results

- Pay attention when dealing with patient results.

⚠ WARNING!

Using images with tests

Risk of results being misinterpreted

- Use the zoom feature to view images in more detail.
- Images must be used together with numerical results and any additional information provided by the instrument.

⚠ CAUTION!

Validating results

Risk of result being misinterpreted or delayed results

- Before validating results, it is strongly recommended to check the previous test results and comments.

Printing

⚠ CAUTION!

Errors in identification of orders, tubes or patients

Wrong results or delayed results

- Be careful when printing labels and/or sticking them on the tubes.

⚠ WARNING!

Results

Risk of incomplete or delayed results

- Check reports are configured correctly before starting to use the system.

Quality Control

⚠ WARNING!

Reagent lots

Risk of wrong reagent lots being entered

- It is recommended that you use barcode readers to enter reagent lots.

⚠ CAUTION!

QC rules

Risk of delayed results

- It is recommended to review the behavior of QC rules regularly.

⚠ WARNING!

QC results

Risk of incorrect results due to a wrong or incomplete Quality Control

- Pay special attention when dealing with QC results.
- It is recommended to review QC results.

⚠ WARNING!

QC testing frequency

Risk of QC testing frequency being incorrectly established

- It is recommended that you use time-based QC rules.

⚠ CAUTION!

Reagent lots

Risk of incorrect results

- After changing reagent lots, check the behavior is correct.

⚠ CAUTION!

Automatic lot creation

Risk of wrong lot usage configuration

- Remember that the lot usage value set by default is **In use**.
- It is recommended to review the configuration to define the desired work conditions for each instrument.

⚠ WARNING!

QC lot usage

Risk of incorrect patient results

- Be careful when changing the lot usage from **In use** to **Study** status.
- It is recommended to reject the results received before the lot usage change and review the patient results affected.

Masking

⚠ CAUTION!

Unintended instrument unmasking

Risk of incorrect results

- Pay particular attention when configuring rules that permit the unmasking of instruments.

Symbols and abbreviations

Product names

Except where the context clearly indicated otherwise, the following product names and descriptors are used.

Product name	Descriptor
cobas® infinity central lab	software

Product names

Symbols used in the publication

Symbol	Explanation
•	List item
	Tip. Extra information on correct use or useful hints.
	Table. Used in table titles and cross-references to tables.
[ ]	Square bracket. Used in the items name as defined by your software administrator.

Symbols used in the publication

Abbreviations

The following abbreviations are used.

Abbreviation	Definition
n/a	not applicable
QC	Quality Control

Abbreviations

Data privacy information

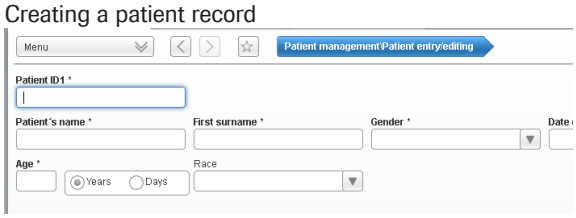
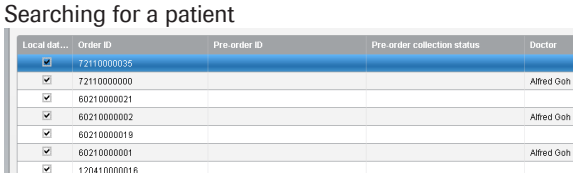
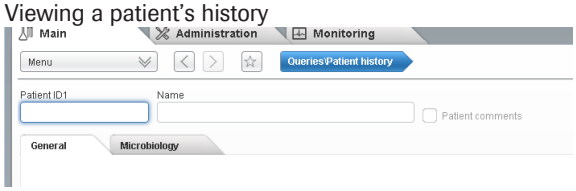
Roche Diagnostics has published a guide that explains the EU GDPR provisions to help your laboratory or medical organization comply with its requirements while using **cobas® infinity** central lab. Please refer to the latest version of the guide available in GRIPS.

Table of contents

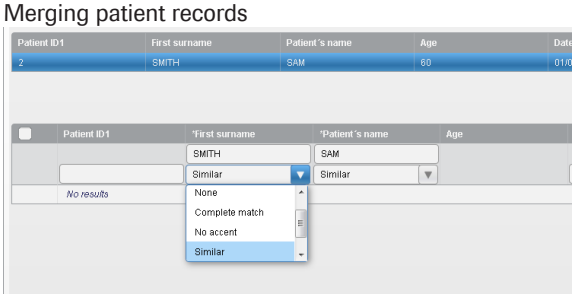
Patient Management

Read the recommendations from the System safety information section related to these tasks for the correct operation of the software.

Patient management (11)

	Task	Steps
1	Creating a patient record 	1. Choose **Main > Patient management > Patient entry/editing**. 2. Fill in at least the mandatory fields. 3. Choose the **Confirm** button.
2	Editing a patient record	1. Choose **Main > Patient management > Patient entry/editing**. 2. Enter the patient ID, and then press Enter. 3. Edit the required information, and then choose the **Confirm** button.
3	Searching for a patient 	1. Choose **Main > Queries > Patient search**. 2. Enter the patient demographics you have available, and then press Enter. You can use wild-card characters like asterisks. 3. Choose the desired patient. 4. To view a patient order, select it and choose the **Results** button.
4	Viewing a patient's history 	1. Choose **Main > Queries > Patient history**. 2. Enter the patient ID, and then press Enter. 3. Optionally, choose one of the following buttons. – **View marked**: to view the selected order. – **View all**: to view the orders belonging to the patient.

Patient management tasks

Task	Steps
5 Merging patient records 	1. Choose **Main > Queries > Patient search**. 2. Enter the patient demographics you have available, and then press Enter. 3. Select the patient that you want to keep, and then choose the **Merge** button. 4. To search for the patient record or several records you want to merge, from the required drop-down lists, choose one of the following options: – **All**: To search all data without filters. – **None**: To search for data that is different from the target data. – **Complete match**: To search for matching data. – **Similar**: To search for similar data. – **No accent**: To search data ignoring any accents. – **Blank**: To search for other patient records where this field is also empty. 5. Choose the **Apply** button. 6. From the results shown, select the patient you want to merge with the current patient. 7. Choose the **Merge** button. 8. Choose the **Yes** button.

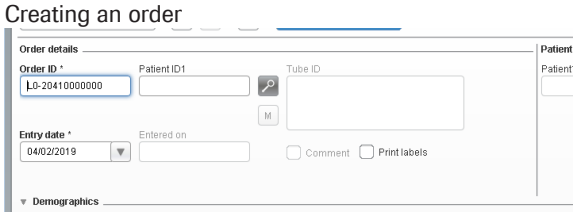
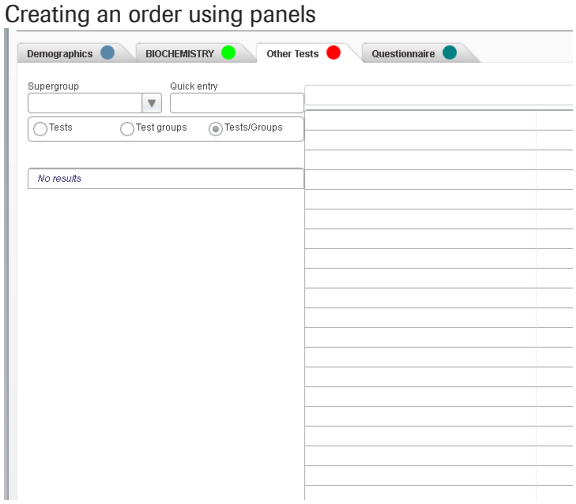
Patient management tasks

Press F1 to open the User Assistance and then search “Patient management”.

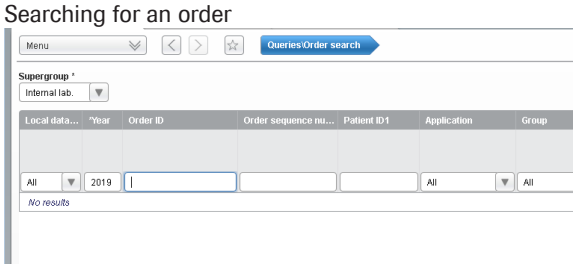
Order management

Read the recommendations from the System safety information section related to these tasks for the correct operation of the software.

Order management (11)

Task	Steps
1 Creating an order 	1. Choose **Main > Order entry > Order entry**. 2. Fill in the Order ID field or leave the one by default. 3. Enter the patient ID, the name and/or surname, and then press Enter. – Optionally, choose the button, and perform a patient search, and then choose the **Apply** button. 4. Fill in at least the mandatory demographics. 5. Double-click the tests you want to run for this order. 6. Choose the **Save** button.
2 Creating an order using panels 	1. Choose **Main > Order entry > [Order by Panels]**. 2. Fill in the Order ID field or leave the one by default. 3. Enter the patient ID, the name and/or surname, and then press Enter. – Optionally, choose the button, and perform a patient search, and then choose the **Apply** button. 4. Optionally, from the **Entry date** drop-down list, choose a different date prior to the current date. 5. In the demographics tab, enter the order demographics. 6. Choose the desired tab, and then select the check box of the desired tests. 7. Choose the **Save** button.
3 Creating an order by batch 	1. Choose **Main > Order entry > [Order entry by batch]**. 2. Fill in the initial sequence number and the final sequence number, the date, and any other mandatory fields. 3. If you want to print labels for the orders, select the **Print labels** check box. 4. Choose the demographics tab, and then fill in the order demographics. 5. Choose the desired tab, and then select the check box of the desired tests. 6. Choose the **Save** button.

Order management tasks

Task	Steps
4 Searching for an order 	1. Choose **Main > Order entry > Order search**. 2. From the **Supergroup** drop-down list, choose the supergroup the order belongs to. 3. Enter the year the order was created. 4. Enter either the order ID, patient ID, or tube ID, and then press Enter. 5. To view the desired order, select it and choose the **Results** button. 6. Optionally, to view the QC results related to the tests in the order, choose the **QC trace** button.

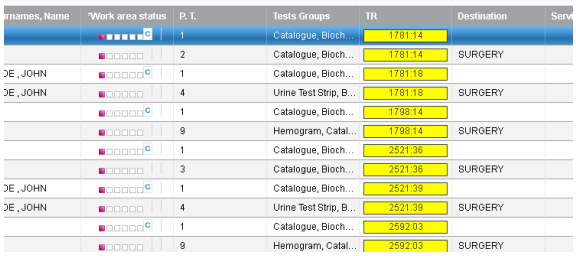
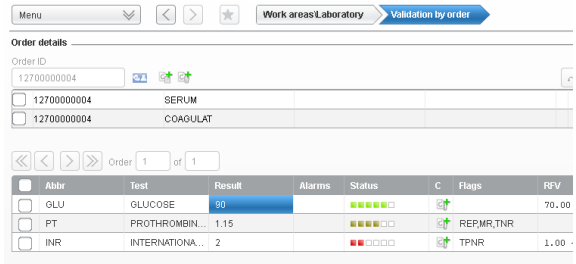
Order management tasks

Press F1 to open the User Assistance and then search “Creating an order”.

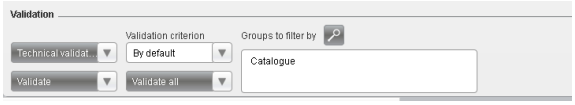
Work areas

Read the recommendations from the System safety information section related to these tasks for the correct operation of the software.

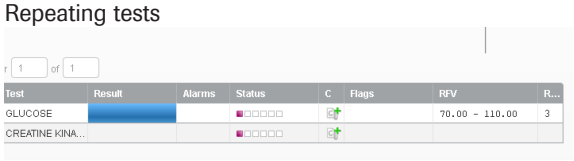
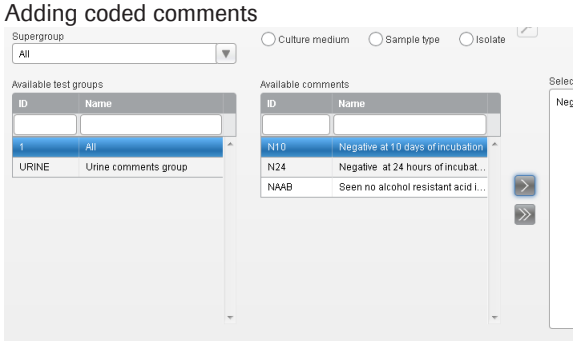
Work areas (12)

Task	Steps
1 Filtering orders 	1. From any screen, choose the **Filter** button. 2. Choose the desired filters, and then choose the **Apply** button. 3. Choose the **Capture filter** button. 4. In the callout, enter the following: – **Name** of the filter. – **By default** check box: the filter is automatically applied whenever you access the screen. – **View orders without tests** check box and **Application** drop-down list: the filter shows the orders belonging to the selected module that do not contain tests. 5. Choose the **Confirm** button. The new filter is displayed in the **Filter** drop-down list.
2 Adding/deleting tests to/from an order 	1. Choose **Main > Work areas > [Your work area]**. 2. Double-click the desired order. 3. Choose the **Sel. tests** button, or press F7. 4. Do the following: – Choose a test supergroup. – Choose an available test group. – To add a test to the list, from the **Available tests** list, double-click it – To delete a test, from the **Tests** list, select it and then choose the button. – Choose the **Confirm** button.

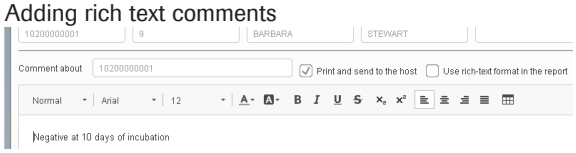
Work areas tasks

Task	Steps
3 Validating test results from the monitoring screen 	1. Choose **Main > Work areas > [Your work area]**. 2. From the **Validation criterion** drop-down list, choose the required one. 3. Select one or more orders and choose one of the following buttons: – **Technical validation**: The software validates all the possible tests according to your rights, without considering the validation criterion. – **Medical validation**: The software validates all the possible tests (if they are technically validated) according to your rights, without considering the validation criterion. – **Validate**: The software validates all the possible tests for the selected orders considering the work area validation criterion. Then, it displays the selected orders in the validation screen. – **Validate all**: The software validates all the possible tests considering the work area validation criterion. Then, it displays all the orders in the validation screen. – **V. & pend.tec.**: The software validates all the possible tests considering the work area validation criterion. Then, it displays the orders pending technical validation in the validation screen. – **V. & pend.med.**: The software validates all the possible tests considering the work area validation criterion. Then, it displays the orders pending medical validation in the validation screen.
4 Validating test results from the validation screen 	1. Choose **Main > Work areas > [Your work area]**. 2. Double-click the desired order. 3. In the **Validation** screen, do one of the following: – To validate all the order tests, choose the **Validate** button. – To validate only a test, select the check box of the test, and then choose the **Test val.**button. – Alternatively, choose the ⚙ (technical validation) or ⚙ (medical validation) buttons.

Work areas tasks

Task	Steps
2 Repeating tests 	1. Choose **Main > Work areas > [Your work area]**. 2. Double-click the desired order. 3. In the **Validation** screen, select the check box of the test,and do one of the following: – Choose the **Repeat** button. – Alternatively, choose the ↻ button. – Optionally, to see the repetition history of the selected test, to request rerun test with dilution, and to set a test as current, choose the **Repetitions** button.
3 Adding coded comments 	1. Choose **Main > Work areas > [Your work area]**. 2. Double-click the desired order. 3. Choose the **Comment** button. 4. From the **Comment** screen, choose one of the following options to decide where the comment is assigned: – **Patient** – **Order** – **Test** 5. From the **Supergroup** drop-down list, choose the relevant comment supergroup. 6. Double-click the comment you want to assign. 7. Optionally, to attach a file from the server or local PC, choose the 🔍 button, choose the required file, and then choose the **Confirm** button. 8. To save the comment and return to the working screen, choose the **Accept and back** button.

Work areas tasks

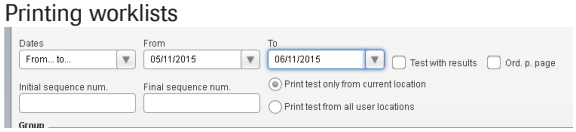
Task	Steps
Adding rich text comments  	1. Choose **Main > Work areas > [Your work area]**. 2. Double-click the desired order. 3. Choose the **Comment** button. 4. From the **Comment** screen, choose one of the following options to decide where the comment is assigned: – **Patient** – **Order** – **Test** 5. Choose the **Rich text comments** button. 6. In the comment panel, enter your free-text comment and edit the format. 7. Optionally, select the following check boxes: – **Print/Send to host**: To print the comment and send it to the host. – **Use rich-text format in the report**: To display rich text format in the printed report. 8. Optionally, to attach a file from the server or local PC, choose the button, choose the required file, and then choose the **Confirm** button. 9. Choose the **Confirm** button to save the comment and return to the Comment screen.

Work areas tasks

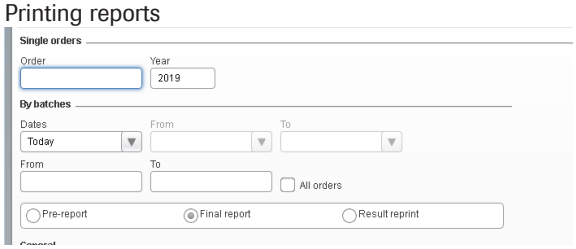
Printing

Read the recommendations from the System safety information section related to these tasks for the correct operation of the software.

Printing (13)

Task	Steps
1 Printing worklists 	1. Choose **Main > Worklists > Print list**. 2. In the **Print** area, enter the relevant data in the filters to search for the desired worklist. 3. To include tests according to your associated locations, choose one of the following options: – **Print test only from current location** – **Print test from all user locations** 4. Select the desired group and/or list template. 5. Choose the **Print** button. 6. To reprint a worklist, select it from the table, and then on the upper part of the screen, choose the **Reprint** button.
2 Printing a single report 	1. From the desired work area, select all the desired orders, and then choose the **Print** button. 2. In the **General** group box, choose the button to select the tests you want to print. 3. To include only validated tests in the report, select the **Print only validated tests** check box. Otherwise, the software prints a pre-report. 4. Optionally, from the **Print target** drop-down list, choose the printer you want to set as the default printer. 5. Optionally, from the **Reports** drop-down list, choose the desired report template. 6. Choose the **Print** button.

Printing tasks

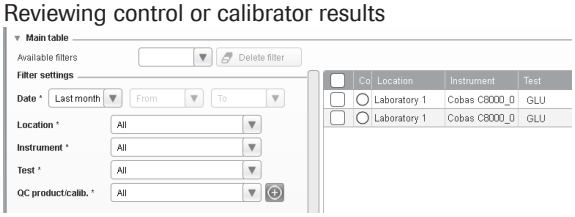
Task	Steps
3 Printing reports 	1. Choose **Main > Report > Report print** or choose the screen from where you want to print a report, and choose the **Print** button. 2. In the **By batches** group box, enter the date or date range, and then enter the initial and final order IDs or sequence numbers or select the **All orders** check box. 3. Select the type of report you want to print: – **Pre-report**: To see the status of the order that you want to create a report for. – **Final report**: To print the final report for the desired order if all the tests included are medically validated. – **Result reprint**: To reprint a final report. You can make any number of copies. 4. In the **General** group box, choose the **Order ID** or **Order sequence number** options of the requested orders. – Optionally, choose the button to select the tests you want to print. – Optionally, select the **Print only validated tests** check box to include only validated tests in the report. 5. In the **Application** group box, select the modules in which you want to print reports. 6. Optionally, from the **Print target** drop-down list, choose the printer you want to set as the default printer. 7. Optionally, from the **Reports** drop-down list, choose the desired report template. 8. Choose the **Print** button.

Printing tasks

Quality Control

Read the recommendations from the System safety information section related to these tasks for the correct operation of the software.

Quality Control (13)

Task	Steps
1 Reviewing control or calibrator results 	1. Choose **Main > QC > QC Result review**. 2. In the **Filter settings** panel, from the drop-down lists, choose the relevant options, and choose the **Apply** button. – Alternatively, from the **Available filters** drop-down list, choose a saved filter. 3. Select a control or calibration result and do the following: – To display information about the result, choose the **Details** tab. – To see all of the actions performed on it, choose the **History** tab. – To see the patient results affected by this QC result and repeat, rerun, or release any result, choose the **Affected results** button. – If applicable, to see detailed information about the bracketing rule applying to the selected QC result, choose the **Bracketing** tab. 4. Optionally, to add a comment to the control or calibrator result, do one of the following: – To enter a free text comment, in the **Comment** tab, enter it and then choose the **Confirm** button. – To assign a coded comment, choose the **Cod. comments** button, choose the required one, and then choose the **Confirm** button.
2 Accepting QC results	1. Choose **Main > QC > QC Result review**. 2. In the **Filter settings** panel, from the drop-down lists, choose the relevant options, and choose the **Apply** button. – Alternatively, from the **Available filters** drop-down list, choose a saved filter. 3. In the table, select the check box of the controls whose result you want to accept, and then choose the **Accept res.**button.

Quality Control tasks

Task	Steps
3 Rejecting QC results	1. Choose **Main > QC > QC Result review**. 2. In the **Filter settings** panel, from the drop-down lists, choose the relevant options, and choose the **Apply** button. – Alternatively, from the **Available filters** drop-down list, choose a saved filter. 3. In the table, select the check box of the controls whose result you want to reject, and then choose the **Reject res.** button.
4 Accepting lot values 	1. Choose **Main > QC > QC Result review**. 2. In the **Filter settings** panel, from the drop-down lists, choose the relevant options, and choose the **Apply** button. – Alternatively, from the **Available filters** drop-down list, choose a saved filter. 3. In the table, select the check box next to the control whose lot values you want to accept, and then choose the **Review lot values** button. 4. In the **Lots** screen table, choose the required lot, and in the **Lot values by test**, select the check box next to the instrument-test assignment whose values you want to accept, and then choose the **Accept lot values** button. 5. In the dialog box, choose the **Confirm** button.

Quality Control tasks

Task	Steps
5 Levey-Jennings chart review	1. Choose **Main > QC > QC Result review**. 2. In the **Filter settings** panel, from the drop-down lists, choose the relevant options, and choose the **Apply** button. – Alternatively, from the **Available filters** drop-down list, choose a saved filter. 3. To see the QC results on the **Levey-Jennings chart** screen area, select the required round check boxes. 4. You can filter by the following options: – **Grouping period**: - **No group**: It displays one point for each control result. - **Daily**: It displays one point for all the results obtained on the same day. - **Weekly**: It displays one point for all the results obtained on the same week. - **Monthly**: It displays one point for all the results obtained on the same month. – **Show standby bottles** check box: Select it to display standby bottle control results, if any – **Show rejected results** check box: Select it to display rejected control results, marked by ✕ icons. 5. Optionally, if you have selected only one control, do one of the following: – To display the number of standard deviations, choose the **SD values** option. – To display the measurement unit used for the test, choose the **Absolute values** option. – To display the upper and lower limits for the test series, choose the **Relative values** option. 6. Optionally, choose one of the following displaying options: – To display all selected combinations in a single chart, choose the **One chart** option. – To display each selected combination in its own chart, choose the **Multiple charts** option. 7. To display a specific QC result information, hover the mouse over the desired measurement point. 8. Optionally, to obtain a report with the Levey-Jennings chart information, choose the **Print** button.

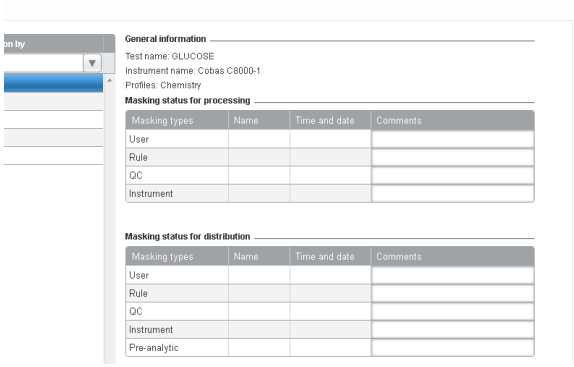
Quality Control tasks

Press F1 to open the User Assistance and then search “QC” or “Levey Jennings chart”.

Masking

Read the recommendations from the System safety information section related to these tasks for the correct operation of the software.

Masking (15)

	Task	Steps
1	Types of masking 	▪ **Mask processing**: The target is considered in the workflow calculation and the sample is distributed there. However, the software does not send any information to the target, and therefore, the sample is not processed and the tube continues with the workflow. This option can be used when an item is temporarily unavailable, e.g. due to QC. ▪ **Mask distribution**: The target is closed, therefore it is not considered in the workflow calculation and the sample is not distributed to that target. This option can be used when an instrument or a test is unavailable for the whole day.
2	Masking an instrument, test or target 	1. Choose **Monitoring > Masking**. 2. Choose the tab corresponding to the item type you want to mask, and then choose the specific item. 3. Choose one of the following buttons: – To mask an item associated with a workflow, choose the **Mask processing** button or the **Mask distribution** button. – To mask an item not associated with any workflow, choose the **Mask processing** button. 4. Optionally, in the **Comments** area, enter a comment. 5. Choose the **Save** button.
3	Unmasking an instrument, test or target	1. Choose **Monitoring > Masking**. 2. Choose the tab corresponding to the item type you want to mask, and then choose the specific item. 3. Choose one of the following buttons: – **Unmask processing**. – **Unmask distribution**. 4. Optionally, if a test has been masked by rule engine or by QC, choose the **Override** button to undo all maskings manually. 5. Choose the **Save** button.

Masking tasks

Press F1 to open the User Assistance and then search “Masking”.

Software icons

Workflow icons

The following icons indicate the type of target in the **Sample tracking** screen.

Icon	Description
	**Instrument buffer**
	**Instrument**
	**Manual archive**
	**Post-analytic**
	**Pre-analytic**
	**Virtual target**

Workflow icons

Tube icons

The following icons indicate the type of tube and its status. If one of these icons is displayed in gray, the event is pending to be performed.

Icon	Description
	Tube sorted to a target.
	Tube sorted to an archive target (buffer, manual archive, or post-analytic).
	Information sent to the pre-analytic.
	Aliquot created.
	Aliquot distributed (This icon is only displayed in the **Manual distribution** screen).
	Sample seen.
	Sample centrifuged.
	Sample retrieved.
	Sample disposed.
	Information sent to analyzer.
	Some results received.

Tube icons

Icon	Description
	All results received.
	Closed node.

Tube icons

Order or test status icons

The status icons represent the status of an order during the sample processing.

Icon	Status
	The order has no tests or there are no tests for the test group in that order.
	The order tests or the test group in that order, do not have any results.
	The order tests or the test group in that order has results, but they are not validated.
	The order tests or the test group in that order have technically validated results.
	The order tests or the test group in that order have medically validated results.
	The order tests or the test group in that order results have been printed or sent to the host.
	The order has been closed.
(v)	The result of the order was obtained with an old version of the test.
	The test has no results.
	The test has a result, but it is not validated.
	The test result is technically validated.
	The test result is medically validated.
	The test result has been printed or sent to the host.
	The order including the test is closed.

Order or test status icons

Validation screen icons/buttons

Depending on your configuration, the **Validation** screen result table may display a series of icons. Most of these also act as buttons and allow you to perform actions on the tests.

Icons/buttons	Description
	▪ Indicates that the test is held. ▪ Unlocks the test so that it can be validated.

Validation screen icons/buttons

Icons/buttons	Description
	▪ Indicates that the test is unlocked. ▪ Locks the test and prevents it from being validated.
	▪ Indicates that the test has not been repeated. ▪ Repeats a test.
	▪ Indicates how many times a test has been repeated. ▪ Repeats a test.
	▪ Indicates that the test is not technically validated. ▪ Validates the test technically.
	▪ Indicates that the test is technically validated.
	▪ Indicates that the test is not medically validated. ▪ Validates the test medically.
	▪ Indicates that the test is medically validated.
	▪ Indicates that this test is a **cobas e** flow main test and that it has embedded tests. ▪ Displays or hides the embedded tests.
	▪ Indicates that the test is a **cobas e** flow embedded test.
	▪ Indicates that the result of the **cobas e** flow main test comes directly from this embedded test.

Validation screen icons/buttons

Comment icons

Comment icons are displayed next to the order, test or patient ID, or in the **C** or **Type** columns if shown on a table.

Icon	Action performed or meaning
	Assigns a comment to an order.
	Assigns a comment to a patient.
	Assigns a comment to a test.
	Displays the order comment and allows you to assign a comment to an order.
	Displays the patient comment and allows you to assign a comment to a patient.

Comment icons

Icon	Action performed or meaning
	Displays the test comment and allows you to assign a comment to a test.
	Displays the test, sample type, culture medium, or isolate comment when you hover over it.
	Indicates that the comment comes from an instrument.
	Indicates that the comment has been entered manually by a user.
	Indicates that the comment has been entered automatically by the system.

Comment icons

Masking actor icons

Comment icons are displayed in **Monitoring > Masking**.

Icon	Description
	Item masked manually (by the user).
	Item masked by instrument.
	Item masked by a QC rule.
	Item masked by rule engine.
	Item masked by reformatter.

Masking actor icons

Test alarm icons

Test results, as well as actions performed on tests may trigger alarms as marked by icons displayed on the result tables.

Icon	Description
	A high-severity alarm has been read.
	The test result is below the normal range.
	The test result is above the normal range.
	The test result is within the lower panic range.
	The test result is within the higher panic range.
	The test result is outside the reference range or the result value type is different from the defined one.
	The test has been reviewed technically.

Test alarm icons

Icon	Description
	The test has been reviewed medically.
	The test is held technically and cannot be validated.
	The test is held medically and cannot be validated
	The test result has triggered a delta check alarm.

Test alarm icons

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