

cryobase

Management software for cryo preserved biological samples

for Windows

Version 2.5

microteq

Copyright 1995-2015 by microteq, 4143 Dornach. All rights reserved.

Please read the following licence agreement carefully. If you don't agree with the following terms of contract, please send back the software and all the accompanying material in the original packing for a refund.

Licence-Agreement:

The purchase of this microteq licence gives you the right to use **one** copy of the software product on a **single computer**.

The software stays the property of microteq and is protected by international copyrights. You may copy the software to your hard disk as long as you keep your original as a backup copy, only.

You are not allowed to copy, translate or transform into another written or fotografic medium neither the software, the manuals nor other written accompanying material.

You are not allowed to hire out or lend out the software, but you may transfer the Microteq licence on term to someone else, provided that you transfer all copies, the complete written accompanying material to the receiver and the receiver agrees with the licence agreement. A transfer must include the latest version (update) and all preceding versions.

If the software should not function correctly, the warranty of microteq is limited by choice of **microteq** to the correction of the occurred malfunction or the refund of the amount paid for the licence. The warranty does not apply if the malfunction of the software attributes to an accident, misuse or wrong manipulation.

In no event shall **microteq** be liable for any special, incidental, indirect or consequential damages whatsoever (including, without limitation, damages for loss of business profits, business interruption, loss of business information or any other pecuniary loss) arising out of the use or inability to use the software product.

In no event the liability of microteq will exceed the actual purchase price paid for the product.

Should you have any question to this agreement or should you have any other reason to contact microteq, please refer to the address information in the appendix section of this manual.

1. INTRODUCTION	1
1.1. SYSTEM REQUIREMENTS.....	1
1.2. INSTALLATION.....	1
1.2.1. <i>Single computer installation</i>	1
1.2.2. <i>Network installation</i>	1
1.2.2.1. Installation on the server.....	1
1.2.2.2. Installation on the workstations.....	1
1.3. HELP.....	2
1.4. FIRST STEPS.....	2
1.4.1. <i>Logging in as an administrator</i>	2
1.4.2. <i>Define field designations</i>	3
2. GENERAL FUNCTIONS	4
2.1. USER LOGIN.....	4
2.2. DEFINING PERSONAL PASSWORD.....	4
3. WORKING WITH CRYOBASE	6
3.1. THE THREE WORKING SCREENS.....	6
3.1.1. <i>The main screen</i>	6
3.1.2. <i>The list view</i>	8
3.1.3. <i>The container view</i>	9
3.2. INSERTING SAMPLES.....	10
3.2.1. <i>Insert single samples</i>	11
3.2.2. <i>Insert group of samples</i>	11
3.2.3. <i>Insert sample batch</i>	12
3.2.4. <i>Save sample data for later insertion</i>	14
3.2.5. <i>Load sample data</i>	14
3.3. FINDING SAMPLES.....	14
3.3.1. <i>Field specific search</i>	15
3.3.2. <i>Global search</i>	15
3.4. REMOVING SAMPLES.....	15
3.5. MOVING SAMPLES TO OTHER LOCATIONS.....	16
3.6. EDITING SAMPLES.....	16
3.7. BACKUP COPIES.....	16

4. ADMINISTRATION.....	18
4.1. PROGRAM OPTIONS.....	18
4.2. DEFINING CONTAINER GROUPS.....	18
4.3. DEFINING FIELD DESIGNATIONS.....	19
4.4. ACCESS LIMITATION.....	19
4.4.1. <i>Defining users</i>	19
4.4.2. <i>Defining user profiles</i>	19
4.5. ACTION LOGGING (HISTORY).....	21
4.5.1. <i>Viewing history</i>	21
4.5.2. <i>Deleting history</i>	21
4.6. CONTAINER CONFIGURATION.....	21
4.6.1. <i>Adding containers</i>	21
4.6.2. <i>Updating a container</i>	21
4.6.3. <i>Configuring container</i>	22
4.6.4. <i>Removing container(s)</i>	23
4.7. CONTAINER MAINTENANCE.....	23
4.7.1. <i>Task reminder window</i>	24
4.7.2. <i>Maintenance screen</i>	24
4.7.2.1. Adding task.....	25
4.7.2.2. Confirming task as done.....	25
4.8. DATA ADMINISTRATION.....	26
4.8.1. <i>Deleting history</i>	26
4.8.2. <i>Compressing database</i>	26
APPENDIX A.....	27
WE ARE INTERESTED IN YOUR OPINION!.....	27
APPENDIX B.....	28
WHERE DO I GET HELP?.....	28

1. Introduction

1.1. System requirements

- min. Pentium-II processor
- min. 128 Mb RAM
- Win98, WinME, WinNT, Win2k, WinXP
- min. 20 Mb free space on hard disk

1.2. Installation

Insert your **CryoBase** CD into your CD-ROM drive. From the windows task bar select **Start / Run** and enter: **D:SETUP** where D stands for the drive letter your CD-ROM uses. Then follow the instructions of the installation program.

1.2.1. Single computer installation

If you perform a single computer installation, select 'single computer' when the installation program will ask for the type of installation.

1.2.2. Network installation

The network installation should be performed by the network administrator. If you perform a network installation, select 'network' when the installation program will ask for the type of installation. This will install **CryoBase** to your server.

1.2.2.1. Installation on the server

If you don't perform your installation directly from the server machine, but from a workstation, please ensure that you have mapped the server drive on which you would like to install **CryoBase** to a drive name on your workstation (i.e. F: = \\Server\C).

1.2.2.2. Installation on the workstations

From any workstation start the program **ClientSetup.EXE**, which is now located in the server directory where you have previously installed **CryoBase**.

1.3. Help

If you have questions on using the program, press the **F1 key** to get information about the action you are currently performing.

Press F1 for assistance on help or select the menu **Help / Using help**.

1.4. First steps

Before beginning to work with **CryoBase** productively, you must follow a number of first steps:

Mandatory steps:

- Log in as an administrator.
- Define field designations.

Optional steps (see corresponding topics in chapter ‚Administration‘)

- Define users.
- Define user access profiles.
- Define container groups.
- Define program options.
- If container maintenance is activated, confirm the 'installation task', as soon as the container (hardware) has been installed in your company.

Next step:

- Insert samples

1.4.1. Logging in as an administrator

The first time you log in you can identify yourself as an administrator, only. Users will be able to log in as soon as the administrator has defined users and user profiles (see respective topics).

The identification for the administrator is **ADMIN**. There is no password. Please define your personal password as soon as possible by selecting the menu *User / Define password* on the main screen.

1.4.2. Define field designations

For any container group, you can define the designations of the fields that describe your samples. Defining field designations is part of the container group definition (see respective topic), because field designations can be defined by container group, only. If you don't want to define container groups, all your field designations apply to the standard group 'Containers'.

You can define one date/time field, up to 10 text fields with a maximum length of 50 characters per field and one memo field with no limitation of length.

The maximum length of a field designation is 20 characters. The designations of the date/time field and the first text field (main field) are mandatory. If you omit the designation of any other field, it will be skipped and not used by the program.

Masked:

If you check this box, any user who's user profile denies access to masked fields, will not be able to enter data into the corresponding field.

Mandatory:

If you check this box, the data entry into this field will be mandatory. I.e. the user will not be able to insert a sample into the container, if there is no data in this field.

2. General functions

2.1. User login

In order to be able to use **CryoBase** you must first identify yourself. Your identification is needed by **CryoBase** first to know to which functions you will have access to (defined by the administrator) and second to trace your actions performed with your cryobiological equipment.

Id:

Enter your identification or user name. Your Identification has been previously defined by the administrator.

The identification for the administrator is '**ADMIN**' and cannot be changed.

Password:

Enter your password. You can define (or change) your own password by selecting *User | Define password* from the menu on the main screen. Your password is known by yourself, only, so don't lose it!

The password and the user identification are not case sensitive.

Because security is very important for **CryoBase**, you will be logged out automatically by the program after a certain amount of time (normally four minutes) of no action performed. This protects you from other users performing actions with your identification, if for once you forget to logout manually after having finished your work.

2.2. Defining personal password

Every user (including the administrator) can define his own password. This protects you from other users accessing the program with your identification. The password is known by yourself, only, so don't loose it! Change your password by selecting *User | Define password* from the menu on the main screen.

First enter your password (not case sensitive). You will notice, that there will be displayed asterisks instead of the characters you type. This is because the program wants to prevent other persons to look over your shoulders and read your password while you type it.

Then enter your password again - to let the program check if you have entered it correctly - and klick the *Ok* button.

Delete:

When you click the *Delete* button, your password will be cleared. Please be aware that if you don't specify a password, every user knowing your identification (which in fact is not secret) can enter the program and perform actions using your identification.

3. Working with cryobase

3.1. The three working screens

When working with **CryoBase** you will mostly work with three screens: The main screen, the list view and the container view.

3.1.1. The main screen

The main screen consists of the buttons for the main functions of **CryoBase** on the left side and a list with the available containers on the right side.

Main function buttons:

Search:

To search for samples inside a number of selected containers. The found samples can then be removed, edited, printed or just viewed.

Insert samples:

To insert one single sample or multiple samples with the same content into the selected container.

Insert group:

To insert a group of samples having almost the same content, but some information differing from sample to sample.

Insert batch:

To insert a batch of samples having the same content or some information differing from sample to sample, but all samples marked belonging together all over the program. (I.e. you can not change a common field in a sample belonging to a batch. You have to remove the sample from the batch or have the program change the field in all the samples being part of the batch.)

List view:

Shows all the samples being found inside a number of selected containers in a list form. Samples can then be manipulated like removed, printed or edited.

Container view:

Shows all the samples being found inside a number of selected containers in a graphical form. The container is displayed as a 'container top view', 'rack side view' and a 'box top view'. Samples can be manipulated like removed or moved to other locations.



Start:

Every time you begin your work, click the *Start* button and identify yourself.



Stop:

Every time you have finished your work, click the *Stop* button to prevent other users performing actions with your identification.


Container list:

You need the container list to select the container(s) on which you want to perform actions like searching, inserting or viewing samples. You select or deselect a container by clicking his name in the container list. A selected container will be shown with the  icon in cyan color and a deselected container with the  icon colored gray.

Select/Unselect all:

You can select all the available containers by clicking the  button and deselect all the containers by clicking the  button.

No. of empty locations:

You can see the number of empty locations for every available container by clicking the  button and switch this option off by clicking the same button again.

3.1.2. The list view

The list view shows samples in a list form. Samples can be manipulated like removed, printed or edited. The screen is divided into an upper edit area and a lower sample list area.

Sample list:

You need the list for viewing samples in the desired sort order and to select samples for further manipulation.


You select samples by clicking the record selector button (on the left edge of each row). After having selected the samples, you can edit, print or remove them.

You can change the sort order of the list by clicking into the column header(s) of the desired column(s). You can sort by three columns at a time and sort in an ascending or descending order. If you click the corresponding column the first time, it will be sorted in ascending order. By clicking the same column again, it will be sorted in descending order and by clicking it a third time, it will be not sorted again.


Enlarge list/edit area:

You can either enlarge the edit area or the list area by clicking the horizontal bar, which separates the edit and list area, and dragging it up or down.


Printing sample list:

You can either print all the sample list by not selecting any sample or you can print a number of selected samples by selecting the appropriate samples in the list and then click the  button.

Editing samples:

You edit samples by selecting the samples you would like to edit, entering your changes in the edit area and then click the  button to save your changes. If you have selected more than one sample, you will be able to change only the fields which have common data to all your selected samples.

Removing samples:

You remove samples by selecting the samples you would like to remove and then click the  button.

3.1.3. The container view

The container view shows the samples in a graphical view with a 'container top view', 'rack side view' and a 'box top view'. Samples can be manipulated like removed or moved to other locations.


Container top view:

Shows the container and all its racks from the top. Sometimes a blue and/or a yellow number is displayed in a rack. This shows the number of selected samples (blue) and the number of found samples (yellow) for the appropriate rack.

Rack side view

Shows the currently selected rack and all its boxes from the side. Sometimes a blue and/or a yellow number is displayed in a box. This shows the number of selected samples (blue) and the number of found samples (yellow) for the appropriate box.


Box top view :

Shows the currently selected box from the top. In every location which is not empty, a sample icon  is displayed. You can see the content of the sample by right clicking the appropriate location.

Container selector:

In the upper right of the container view screen, there is a list box called the *container selector*. If you have selected more than one container in the container list on the main screen, you can select here which container to display.

Removing samples:

You can remove samples by selecting the locations containing the samples you would like to remove and then by clicking the  button.

Moving samples to other locations:

You move samples to other locations in two steps:

1. You move the selected sample, box or rack to the clipboard.
2. You select the new location in your container or you open the container view of your destination container, if your new location is not in the same container and then paste the sample, box or rack from the clipboard.

Demo container:

If you choosed to use your container as a demo version, you can immediately change your container into a full version container by selecting the menu *Extras / Remove demo state* and then entering the activation code given to you by your local dealer.

3.2. Inserting samples

There are three types of samples that can be inserted into a container:

1. Single samples.
2. Group of samples.
3. Sample batches.

Single samples:

One single sample or multiple samples with the same content.

Group of samples:

A group of samples has almost the same content, but some information differs (usually one or two fields) from sample to sample.



Sample batches:

A sample batch consists of samples having the same content or some information differing from sample to sample, but all samples are marked belonging together all over the program. (I.e. you can not edit a common field in a sample belonging to a batch. You have to remove the sample from the batch or have the program change the field content in all the samples being part of the same batch.)


And there are three ways of inserting which are valid for any type; inserting single samples, inserting groups of samples and inserting sample batches:

1. Insert samples directly into a selected container.
2. Just enter the sample information and then save it for later insertion.
3. Insert samples into a selected container using previously saved sample data.




Procedure 1:

On the main screen, select the container you would like to insert samples into and click one of the three insertion buttons, enter the sample data, select the destination position in the container by clicking the  button and then insert the samples by clicking the  button.

Procedure 2:


On the main screen, select the container group the data belongs to and click one of the insertion buttons, enter the sample data and then save it by clicking the  button.



Procedure 3:

On the main screen, select the container you would like to insert samples into and click one of the three insertion buttons, get the previously entered sample data by clicking the button , select the destination position in the container by clicking the  and then insert the samples by clicking the  button.

3.2.1. Insert single samples

Click the *Insert samples* button on the main screen to insert single samples or multiple samples with the same content and follow the procedure according to the chapter inserting samples.

After having entered your sample data, click the button  to switch to the *container view* and select the destination position(s) for your sample(s). You may notice that all empty locations are marked with the *found color* (yellow). This makes it easier for you to see which locations can be used for insertion, especially when the container is quite full.

Select a location for insertion by clicking on it in the *box top view* and deselect it by clicking on it again. After having finished selecting your container destination positions, you can either switch back to the *edit view* by clicking the  button and make further changes to your data or you can insert the samples into your container by clicking the  button.



3.2.2. Insert group of samples

Click the *Insert group* button on the main screen to insert a group of samples having almost the same content, but some information differing from sample to sample (usually one or two fields).

The group insertion screen is divided into two areas: The upper *edit area* and the lower *differing field list area*.



Edit area:

Enter your data into any field and select the fields which will differ within the group by clicking the check box to the right of each concerned field.

When finished, save the sample to the group by clicking the  button. If you want to add further samples to the group, click the  button. You will notice, that you can edit only the fields that you marked previously as differing within the group. Continue to save samples to the group until you have finished, then insert your samples into your container by following the procedure according to the chapter inserting samples.


List area:

This list shows all the differing fields of all the samples you have saved to your group. You can edit a sample by selecting it in the list, make the desired changes to the corresponding fields in the *edit area* and save it back to the group by clicking



the  button. You can also remove a sample from the group by selecting it in the list and clicking the  button.

Enlarge list/edit area:

You can either enlarge the *edit area* or the *list area* by clicking the horizontal bar, which separates the edit and list area, and dragging it up or down.

After having entered your sample data, click the  button to switch to the *container view* and select the destination position(s) for your sample(s). You may notice that all empty locations are marked with the *found color* (yellow). This makes it easier for you to see which locations can be used for insertion, especially when the container is quite full. You must select exactly the number of locations as you have samples within your group, otherwise **CryoBase** will not let you insert it into your container.

Select a location for insertion by clicking on it in the *box top view* and deselect it by clicking on it again. After having finished selecting your container destination

positions, you can either switch back to the *edit view* by clicking  button and make further changes to your data or you can insert the samples into your container by clicking the  button.



3.2.3. Insert sample batch

Click the *Insert batch* button on the main screen to insert a sample batch consisting of samples having the same content or some information differing from sample to sample (usually one or two fields), but all samples being marked belonging together all over the program. (I.e. you can not edit a common field in a sample belonging to a batch. You have to remove the sample from the batch or have the program change the field content in all the samples being part of the same batch.)



The batch insertion screen is divided into two areas: The upper *edit area* and the lower *differing field list area*.

Edit area:

Enter a name and a designation for the batch (if you add a new batch) or select a batch from the list box (if you edit an existing batch), then enter your data into any field and select the fields which will differ within the batch by clicking the check box to the right of each concerned field.

When finished, save the sample to the batch by clicking the  button. If you want to add further samples to the batch, click  button. You will notice, that you can edit only the fields that you marked previously as differing within the batch. Continue to save samples to the batch until you have finished, then insert your samples into your container by following the procedure according to the chapter inserting samples.

List area:


This list shows all the differing fields of all the samples you have saved to your batch. You can edit a sample by selecting it in the list, make the desired changes to the corresponding fields in the *edit area* and save it back to the batch by clicking the  button. You can also remove a sample from the batch by selecting it in the list and clicking the  button.

You may notice that sometimes there is an additional column called 'In container' with a check box. If checked, it means that the corresponding sample has already previously been inserted into the container and some actions can not be performed on it.

I.e. if you remove the sample from the batch, it will not be deleted but still stay in the container, but it will become a single sample and no more belong to your batch. Or if you want to save the batch for later insertion, only samples which are not already in the container will be saved!

Enlarge list/edit area:



You can either enlarge the *edit area* or the *list area* by clicking the horizontal bar, which separates the edit and list area, and dragging it up or down.

After having entered your sample data, click the button  to switch to the *container view* and select the destination position(s) for your sample(s). You may notice that all empty locations are marked with the *found color* (yellow). This makes it easier for you to see which locations can be used for insertion, especially when the container is getting quite full. You must select exactly the number of locations as you have samples (not already being in the container) within your batch, otherwise **CryoBase** will not let you insert it into your container.

If you add samples to a batch already having been inserted into your container previously, you can find its samples by clicking the menu *Edit | Show lot*. This helps you placing the new samples near the ones already being in the container, if required.

To switch back to the display of all the empty locations, select the menu *Edit | Show empty locations*.

Select a location for insertion by clicking on it in the *box top view* and deselect it by clicking on it again. After having finished selecting your container destination

positions, you can either switch back to the *edit view* by clicking  button and make further changes to your data or you can insert the samples into your container by clicking the  button.

3.2.4. Save sample data for later insertion


Comment:

Enter a comment which will be stored in the history file if action tracing has not been deactivated.

Name:

Enter a unique name for the saved sample data. If you choose a name that already exists, you will be asked if you want to overwrite the existing data.

3.2.5. Load sample data

You can load previously saved data for sample insertion into your container by clicking the  button on the insertion screen.



You select your data from a list by its name and designation. In the upper area of the screen, you see the data of the sample(s). If it differs from sample to sample in a certain field, a question mark will be displayed instead of the data itself.

The data you load for insertion of samples will be deleted after the sample(s) have been inserted.

Delete:

You can delete saved data manually, if you don't want to use it anymore for later insertion of samples.

3.3. Finding samples

To find samples, on the main screen, select the container(s) you would like to search samples for and click the search button, enter the search criteria and click the button  for a list view of the search result or the button  for a container view of the search result. In the container view, all the locations containing a sample corresponding to your search criteria, will be marked in the *found color* (yellow).

There are two search types:

1. Field specific search to find data corresponding to the search criteria in specific data fields.
2. Global search to find data containing a specific text in any data field.

3.3.1. Field specific search

Group by:

You can group your search result by at most three fields at a time. Grouping is used for counting the number of samples having the same content in a specific field.

Example:

Let's assume you have stored cells in your container and the first field is called CELLNAME. You now want to fill up your container with all the cells not being enough of them left. In this case you group your search result by CELLNAME and you will get a list of all the different CELLNAMEs in your container and for each the number of samples left.

If you would like to see only the cells where there are left less than i.e. 10 samples of them, you can combine the grouping with the filtering by entering in the first filter field 'Count', '<', '10'.

Filter:

You can filter by at most five fields at a time. In the first column, enter the name of the field you want to have filtered, in the second column enter the operation and in the third column, enter the value the operation applies to.

Numeric operations:

=	equals
>	grater than
>=	greater than or equals
<>	not equals
<	less than
<=	less than or equals


String operations:

Equals	The text must match exactly
Begins with	The text in the field begins with the search criteria text
Occurs in	The search criteria text occurs somewhere in the field text

3.3.2. Global search

You can enter at most three texts as a search criteria and combine them with boolean operations like AND or OR. Every field of the samples in the container(s) will be searched for this text.

3.4. Removing samples

You remove samples by selecting in the list view the samples you would like to remove or by selecting in the container view the locations containing the samples you would like to remove and then clicking the  button.

Comment:

Enter a comment which will be printed on the removal sheet, on the storage report and stored in the history file if action tracing has not been deactivated.

Removal sheet:

Check this box if you want to print a removal sheet. You need a removal sheet for your convenience when removing the samples from your container after having removed them from **CryoBase**. If you don't remember which samples to remove from your container, you can take the removal sheet with you to the container and remove the samples according to your removal sheet.

Storage report:

Check this box if you want to print a storage report for each sample being removed. The storage report contains the complete history of the sample being removed. Every action performed on it from the insertion up to the removal will be printed.

3.5. Moving samples to other locations

To move samples to other locations switch to the container view from the main screen (see topic 'The container view') and proceed in two steps:

1. Move the selected sample, box or rack to the clipboard.
2. Select the new location in your container or open the container view of your destination container, if your new location is not in the same container and then paste the sample, box or rack from the clipboard.

3.6. Editing samples

First start a search (see 'Finding samples') to display the samples to be edited. Switch to the list view and proceed as stated in 'Editing samples' in the chapter 'List view'.

3.7. Backup copies

Make backup copies periodically! It can absolutely happen that your computer fails one day or that a loss of power happens just when **CryoBase** is writing data to your hard disk. In such cases your data will usually be destroyed.

Because it is absolutely required that the data in your computer corresponds to the actual situation in your cryobiological container, you must take precautions against such situations by making backup copies regularly, best after every mutation of your data.

There are several alternatives to make backup copies:

If you have installed **CryoBase** on your network server, let your system administrator include your **CryoBase** data in his daily backup schedule. In this way, your **CryoBase** software and data will be backed up to tape every day automatically.

If you have installed **CryoBase** to your local computer and you have a local tape streamer, make backup copies by using your streamer and your local streamer software.

If you don't have a tape streamer installed, you can make backup copies to diskette if you have Windows98 by using the backup software coming with Windows98. But making backup copies to diskette can be annoying, because the database can get quite big and you will eventually need several diskettes to backup your data.

If you are connected to your local network, but have installed **CryoBase** to your local computer, you can still copy your data to your server and have your system administrator backup the data to tape for you.

Note:

The program files are usually located in the directories 'Drive:\Programs\CryoBase' and 'Drive:\Programs\CryoBase\Reports', the data files are located in the directory 'Drive:\Programs\CryoBase\Data', where 'Drive:' means the drive letter where **CryoBase** has been installed.

4. Administration

The administration functions allow to the user to work GLP/GMP conformingly by limiting access to **CryoBase** or using action logging.

By using access rights, **CryoBase** is not accessible to everybody, which decreases the chance of mismanipulation. Action logging helps the administrator to track any action of any user. This way, the whole course of cryo stocking can be reconstructed at any time.

4.1. Program options

The following program options may be set by the administrator:

Print preview is default:

If checked, every print action goes to the screen before effectively being sent to the printer.

Allow removing samples from the container view:

If checked, the user can remove samples when being in the container view, otherwise the user can remove samples only from the list view.

Trace user actions into history file:

If checked, every action, a user performs will be traced into a history file. This file can be used by the administrator for reporting or for a reconstruction of the whole course of cryo stocking for a certain project at any time.

The default value for every option is *checked*.

4.2. Defining container groups

If you have many containers, you can group them and give the group a name. The containers will then be displayed within their container groups. You also can have different sample types with different field designations by using groups.

Adding a group:

Click the *Add* button in the *Group* frame and enter the name of the group.

Adding containers to a group:

Select the group name in the container list on the left side of the screen, then select the containers you want to add to this group in the *Available container list* and click the *Add* button.

Removing a container from a group:

Click the container name in the container list and then click the *Remove* button. You selected container will be removed from his group and will be part of the standard group 'Containers' again.

Deleting a container group:

Select the container group in the container list and click the *Delete* button. The container group will be removed and eventual containers having been part of this group will become part of the standard group 'Containers'.

4.3. Defining field designations

See chapter 'First steps'.


4.4. Access limitation

4.4.1. Defining users

You should define users if several people work with **CryoBase** and you want either to trace user actions into a history file for reporting or later reconstruction of the course of a project or if you want to limit access to **CryoBase** depending on the user for security reasons.

To add a user, go to the last line of the user list and enter the User id, name and location of the user, then select the name of a user profile applying to this user if you previously have defined user profiles. If you leave the user profile field empty, the respective user will have administrator status and have access to all the program functions.

The user password is not defined here, but by the user himself (see *Defining password*). However, if the user for once forgets his password, the administrator can read the user's password by selecting the row of the corresponding user in the user list. The password can be read in the field located in the upper right corner of the user definition screen.

To edit a user, just enter the new data into the corresponding row of the user you want to edit. If you want to delete a user, select the corresponding row in the user list and click the button .

4.4.2. Defining user profiles

You need to define user profiles to limit access to **CryoBase** depending on the user logging in. To add a user profile, go to the last line of the user profile list on the left

hand side of the screen and enter the user profile name. Then select one or more of the following options:

Access to administrative functions:

The user has the right to access administrative functions like, defining users, container groups, adding containers, viewing history etc.

Access to own samples, only:

The user will have access only the the samples, he inserted into the container.

No access to masked fields:

The user will not be able to access fields which are marked *masked* by the administrator while defining the container group.

Access to history:

The user will be able to access the history functions.

Insert samples:

The user will be allowed to insert samples into the container.

Remove samples:







The user will be allowed to remove samples from the container.

Edit samples:

The user may change and save the content of samples.

Container access:

Use the container access list to limit the access to certain container groups, containers, or even racks of a container. Click a container group, container or rack to select access or click it again to deselect access.

If a user has access to a container group, it is marked in the list with a yellow  symbol, otherwise with a grey  , for access to a container, the corresponding container is marked with a cyan  symbol and a grey  symbol for no access. If a rack is accessible, it is marked with a yellow  , otherwise with a grey  symbol.

If nothing is selected, the user will have access to every container group, container or rack.

4.5. Action logging (history)

When action logging is activated, every action in a container with date, time, user will be recorded into a file. This information can later be reviewed by the administrator for reporting or an eventual reconstruction of a project.

4.5.1. Viewing history

The administrator may review and print a history file for a selected container or containers. He can apply filters or sort the file by using sort criterias. To review the history file, select the respective container(s) in th container list on the main screen, then select the menu *History | view list* to see the history in a list form or select *History | search* to find samples, users or actions in the history file.

4.5.2. Deleting history

The history file stores all the actions any user performs within the program. This means that the history file is getting bigger and bigger successively.

The administrator can delete the history entries up to a desired date by selecting the menu *Administration | Data administration | Delete history* on the main screen. Deleting history entries is final and can't be undone. Please make backup copies before performing this action!

4.6. Container configuration

4.6.1. Adding containers

You can purchase from your dealer additional licences for more containers on diskette. If you want to add containers to **CryoBase**, insert the appropriate diskette into your floppy drive, then select the menu *Administration | Configure container | Add container(s)* on the main screen and follow the instuctions of the program.

4.6.2. Updating a container

If you change the configuration in one of your containers (i.e. exchange a rack), you also have to do so in **CryoBase**. On request you get diskette with an updated container from your dealer. To update **CryoBase** with the container from the diskette, select the container to update in the list on the main screen, then select the menu *Administration | Configure container | Update selected container*.

Note:

In fact, the container is not updated, but a new one is added and the samples of the old container are tried to be moved automatically to the new one. All the samples which could not be moved automatically to the new container will stay on the old one. This gives you the opportunity to move the samples manually, if i.e. the configuration of the new container differs too much from the old container.

4.6.3. Configuring container

You can adjust the container appearance to your needs by changing the following parameters:

Container name:

You can give your container a name that will be displayed all over the program instead of the technical name you selected while adding the container to **CryoBase**.

Container top view:**Numbers:**

The rack designations will be numbers (i.e. 1 to 12).

Characters:

The rack designations will be characters (i.e. 'A' to 'L').

Skip 'J':

The character 'J' will not be used.

Change order:

The order of the rack designations will be changed (i.e. 12 to 1 or 'L' to 'A').

Rack side view:**Numbers:**

The box designations will be numbers (i.e. 1 to 12).

Characters:

The box designations will be characters (i.e. 'A' to 'L').

Skip 'J':

The character 'J' will not be used.

Change order:

The order of the box designations will be changed (i.e. 12 to 1 or 'L' to 'A').

Box top view:**Numbered consecutively:**

If checked, the location designations will be numbered consecutively, if unchecked, the box top view will be divided into columns and lines.

Locations:**Numbers:**

The location designations will be numbers (i.e. 1 to 12).

Characters:

The location designations will be characters (i.e. 'A' to 'L').

Skip 'J':

The character 'J' will not be used.

Change order:

The order of the location designations will be changed (i.e. 12 to 1 or 'L' to 'A').

Lines:**Numbers:**

The line designations will be numbers (i.e. 1 to 12).

Characters:

The line designations will be characters (i.e. 'A' to 'L').

Skip 'J':

The character 'J' will not be used.

Change order:

The order of the line designations will be changed (i.e. 12 to 1 or 'L' to 'A').

If there are different types of racks in the container, you will have to set the rack side view and box top view parameters for every rack type. Select the rack type by clicking into the corresponding rack in the container top view on the right side of the window. All the racks being of the same type will be highlighted by a blue rectangle.

4.6.4. Removing container(s)

You can remove containers from **CryoBase** when they are no longer needed. **CryoBase** will remove only containers which are empty!

To remove a container or containers, select the appropriate container(s) from the container list on the main screen and then select the menu *Administration | Configure containers | Remove selected containers*.

4.7. Container maintenance

Container maintenance is used on the one hand to remind the user that certain tasks concerning a container should be done on specific dates (i.e. phoning the manufacturer, because a decontamination should be done) and on the other hand to keep a history of the maintenance tasks that have been achieved on a certain container.

4.7.1. Task reminder window

The task reminder window will be displayed to every user **five days** before the required execution date of the task.

After having achieved the respective task, you can confirm the task as being executed if you have administrator access rights, otherwise the only thing you can do, is asking your administrator to do it.

Don't show this again:

Click this box if you don't want this window to show up every time you log in. There will only be displayed a message on the bottom line of the main screen. However after any new task having been added, this screen will show up again five days before execution date.





4.7.2. Maintenance screen

The maintenance screen consists of two parts:


1. Tasks: A list of tasks to be achieved (to do list).
2. History: A list of tasks that have been achieved.

Tasks:

You see a list of all the tasks that have to be done with the date of the desired execution of the task, the action to be performed, the name of the user who added the task to the list and a comment.

To add a new task to the list, click the button , to confirm a task as done, select it in the task list and click the button  and to delete a task from the list (done or open), click the button . To print a list of open tasks sorted by the execution date, click the button .

History:

You see a list of all the tasks that have been achieved with the date of execution of the task, the action that has been performed, the name of the user who performed the action and a comment. To print a list of the achieved tasks sorted by the execution date, click the button .


Container selector:

In the upper right corner of the screen, there is a list box to select the container you would like to see the task list of.

All containers:

Check this box to see all the tasks of all the available containers.

4.7.2.1. Adding task

To add a new task to the list, click the button  on the maintenance screen.

Date of execution:

The date when the task should be executed.

Action:

Select one of the actions of the list box.


User:

The user who adds the task to the list (can not be changed).

Comment:

A comment to the task to be achieved.

4.7.2.2. Confirming task as done

To confirm a task as done, select it in the task list and click the button  on the maintenance screen.

Date of execution:

The date when the task has been executed.

Action:

The action that has been performed (can not be changed).

User:

The user who has performed the action.

Comment:

A comment to the task that has been done.

4.8. Data administration

4.8.1. Deleting history

See chapter ‚Action logging (history)‘

4.8.2. Compressing database

Because of the nature of the underlying database of **CryoBase**, deleted records are not really deleted, but only marked for deletion. In some cases, the space of deleted records can not be used again and as a result of this, the database can get bigger and bigger successively.

If you notice, that your database is too big or the data access is getting slower, please try to compress the database.

Data compression is final and cannot be undone. Please make backup copies before performing this action!

Appendix A

We are interested in your opinion!

If you have ideas or suggestions, which could improve our software, please let us know. We will collect your suggestions and try to consider them for a next software release.

Our Address:

microteq
Im Leimgrund 2

CH-4143 Dornach

Phone: +41 (0)61 713 02 02

eMail: info@microteq.ch

Appendix B

Where do I get help?

If you have questions or problems, which are not covered in this manual, please contact your dealer or contact us directly under the following address:

microteq
Im Leimgrund 2

CH-4143 Dornach

Phone: +41 (061) 713 02 02
eMail: support@microteq.ch

Please hold ready your serial number before calling and note the technical specification of your hardware.