Texas Cancer Research Biobank

Acquire 2 User Guide

Version 1.1	Last Updated by: Heidi Dowst
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	Date: Oct 28, 2013

Table of Content

Acquire2 Specimen and Participant Logging

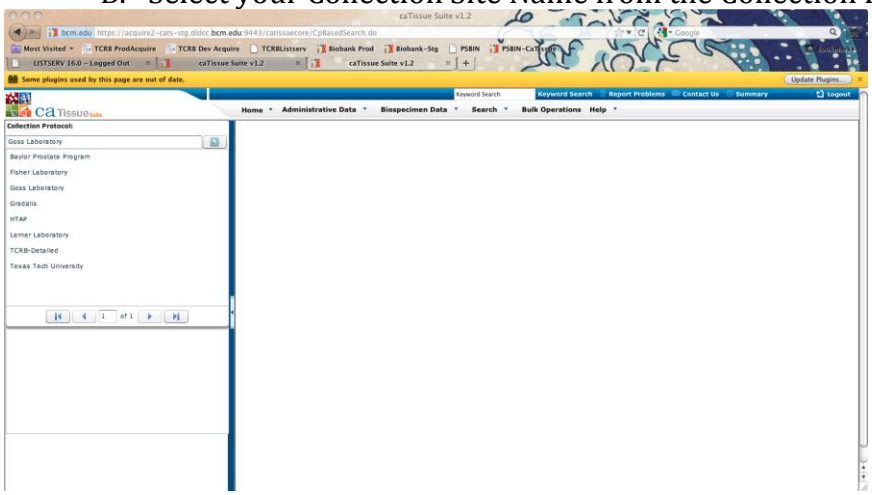
1. Application Login to the Training Site:

A. Login to https:// tcrbacquire-stg.research.bcm.edu/
B. Use your full email address, ex. jdoe@bcm.edu, janed@yahoo.com
C. For BCM users, the password is your network logon, please use this password even if you receive a standardized password email. For non-BCM employees your password will be sent to you in an email.
D. Once you have successfully logged in, choose the caTissue button on the navigation bar.

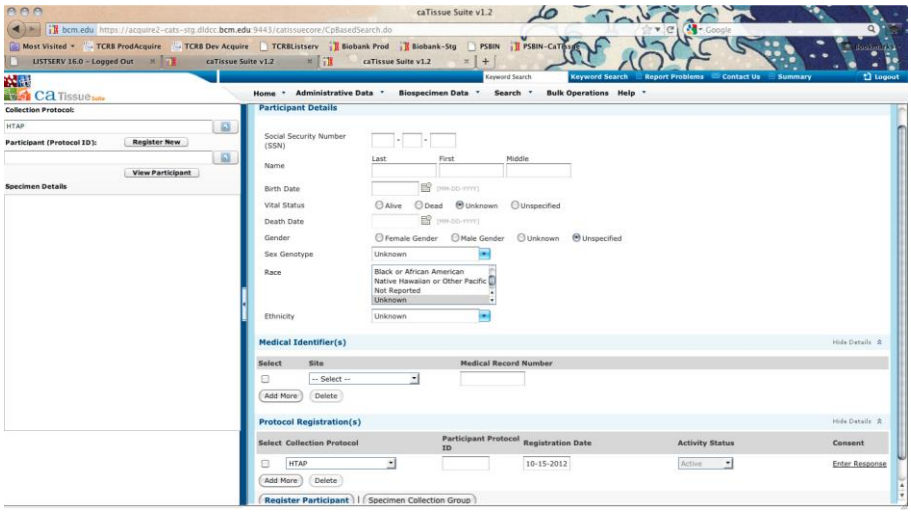
2. Logging a participant:

A. Select Biospecimen Data from the Navigation Bar and click on Collection Protocol Based View.

B. Select your Collection Site Name from the Collection Protocol List.

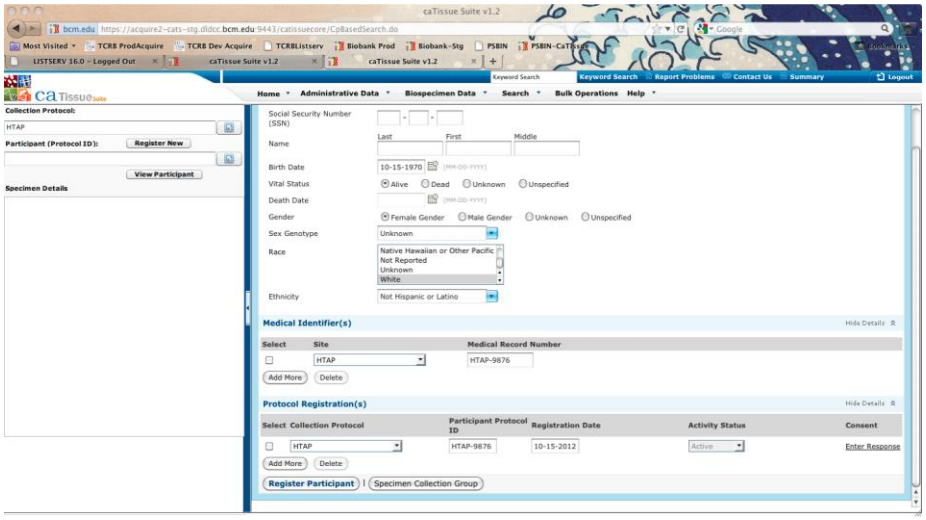


C. Select the Register New button to add a participant.



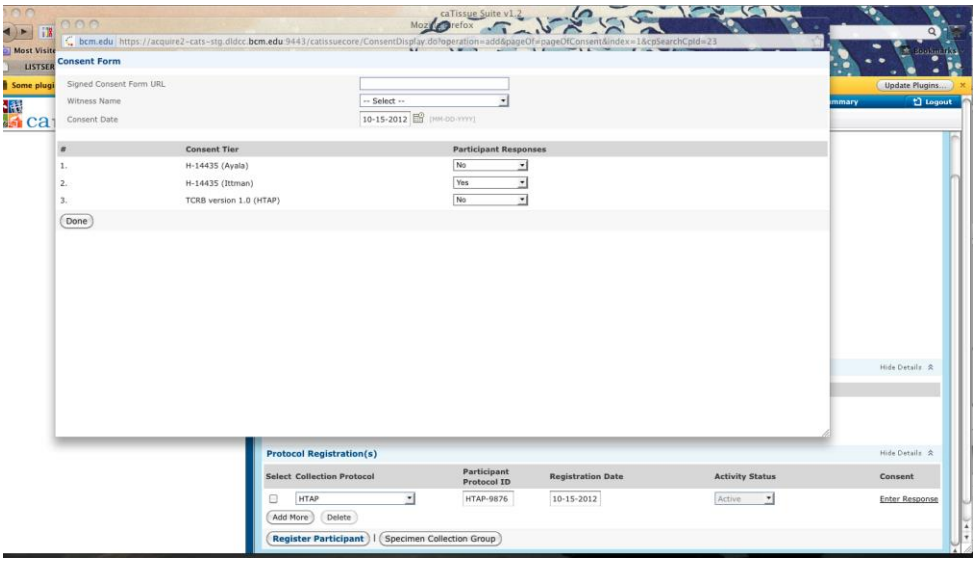
D. Enter any of the Participant Details that you have. None of the fields are required to save the entry**. Gender, Race, Ethnicity, and Birthdate** (masked if desired) are preferred data collection fields. You can mask a date of birth by entering 06-15 for the year of birth. The server will treat this as some time during this year.

E. Under the **MRN section**, click the + icon to show the section if details are not visible. Then select the site and enter your site **MRN number**. Under **Protocol Registration**(s), select the collection protocol which corresponds to your collection site name and enter the **MRN** in the Participant Protocol ID field. Modify the registration date as needed.



F. Consent: Click on the **Enter Response** link. **Select Yes** from the dropdown next to the consent name that the participant was consented with. **Answer No** for other consents or leave the default. Witness Name and Consent URL data entry is not necessary. If the witness name is

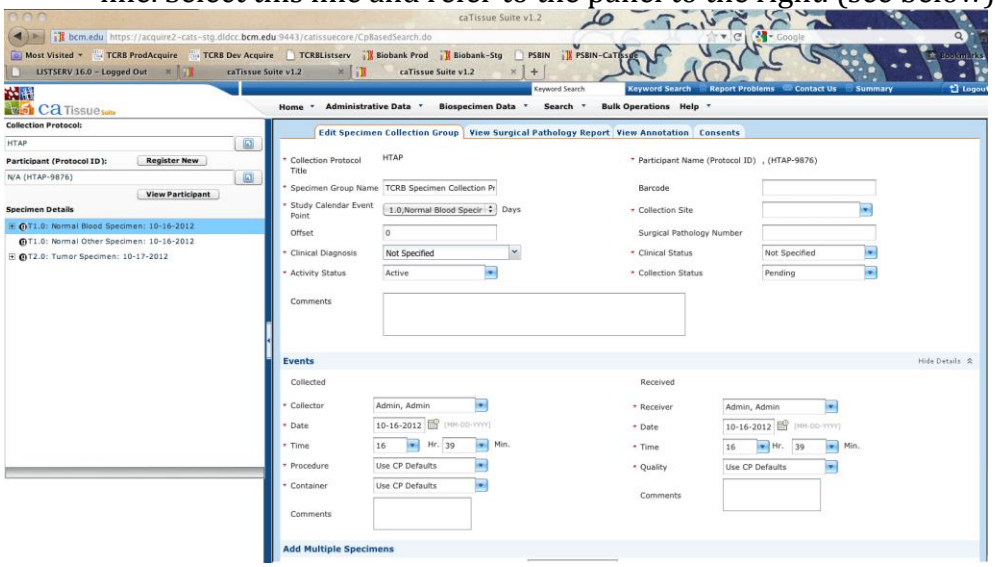
present in the drop down you may select it. **Click Done** on the consent screen.



G. Click **the Register Participant** button on the participant screen. If created correctly the message, Participant successfully created will appear at the top of the screen. If so, then you have registered the participant and can add a specimen to that participant or register another participant by repeating steps D-G.

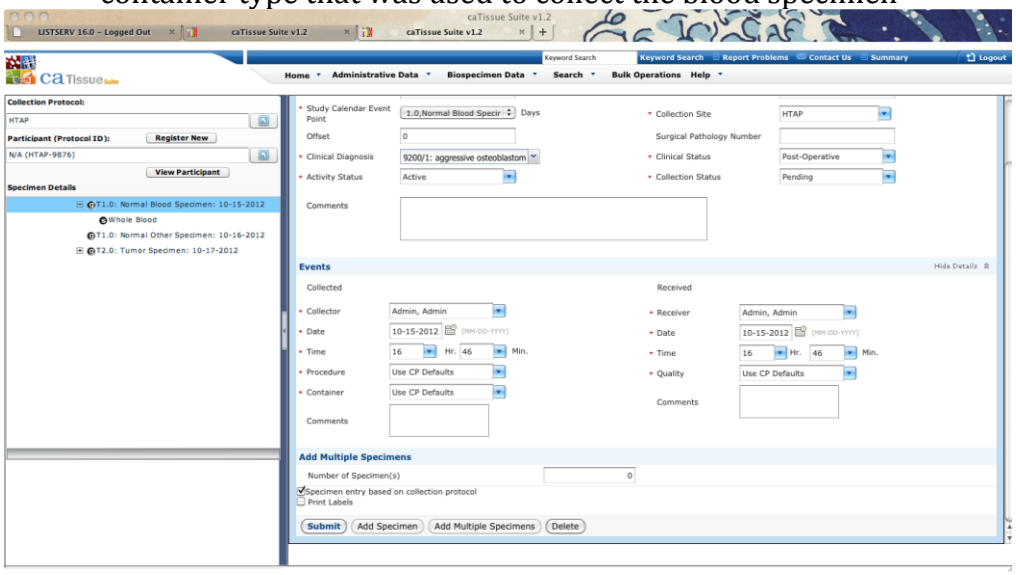
3. Logging a blood specimen

A. From the collection protocol based view, type the MRN number given during participant registration in the Participant Protocol ID field.
B. Select the desired participant from the drop down list when it appears.
C. Click on the **View Participant** button
D. The Specimen Details window will contain a T1.0: Normal Blood Specimen line. Select this line and refer to the panel to the right. (see below)

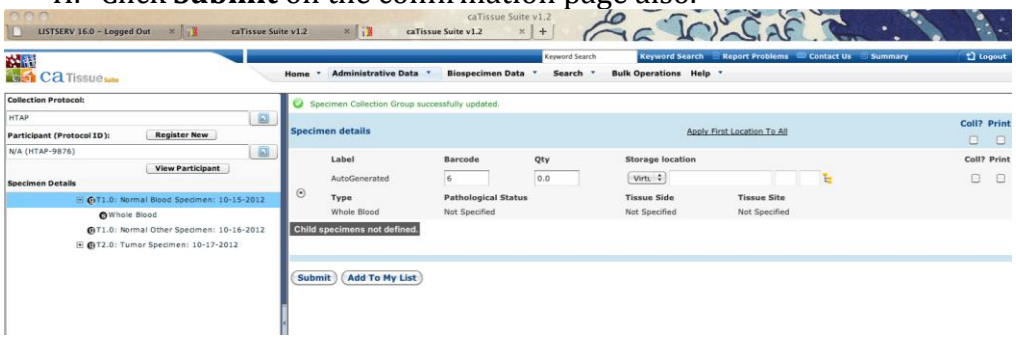


Our first action will update the Specimen Collection Group, after which you will then log the specimen.

E. Many of the fields on this page have been defaulted to Not Specified, allowing the user to enter only the **Clinical Diagnosis Field** (type down addressing, start typing the ICDO code) and the **Collection Site name** (drop down of your site). Other fields may be used, as individual collection sites desire to keep annotations on the specimen.
F. In the **Events Section**, click on the **Container** drop down. Select the container type that was used to collect the blood specimen

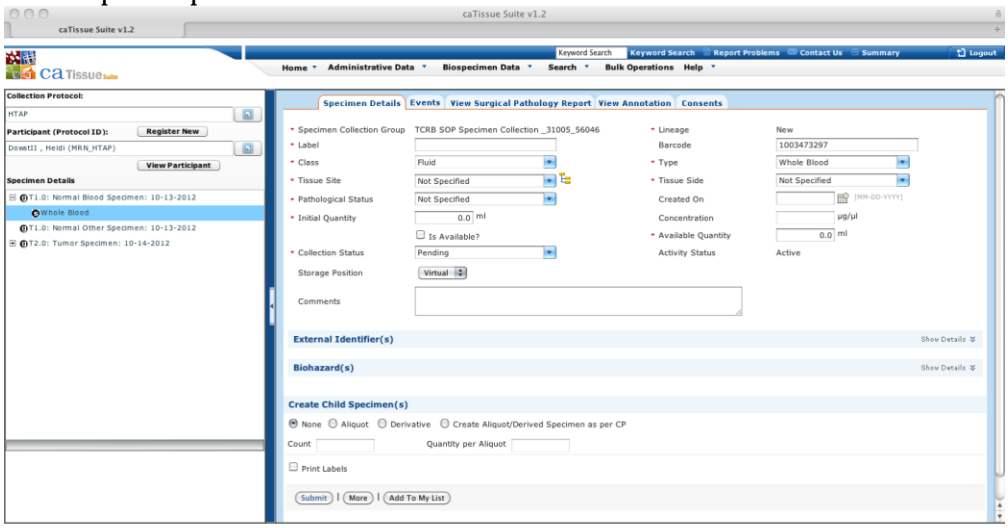


G. Click on the **Submit** button at the bottom of the screen (see above). This will bring up a confirmation page. On this confirmation page, you may also specify the location of the specimen, but this is not required. (Please contact TCRBsupport@bcm.edu if you want to use this feature but do not see locations specific to your site in the location map)
H. Click **Submit** on the confirmation page also.



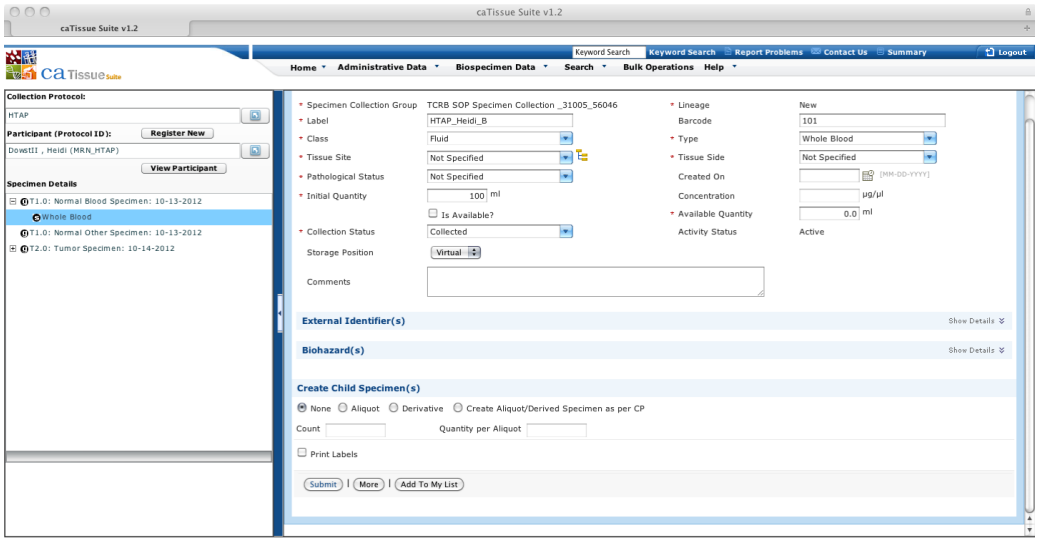
I. Click on the **Whole Blood** selection from the window on the left (see above). This is your specimen.

J. You may now **Enter a Label and Barcode** for your specimen. If you desire, the specimen label and be auto-created for your group based on the participant ID.



For the specimen in the Whole Blood Specimen Collection Group, specimen class and type are filled in for you.

K. Set the **Initial Quantity** to indicate the amount of specimen in the tube and change the **Collection Status** to Collected by using the drop down list.

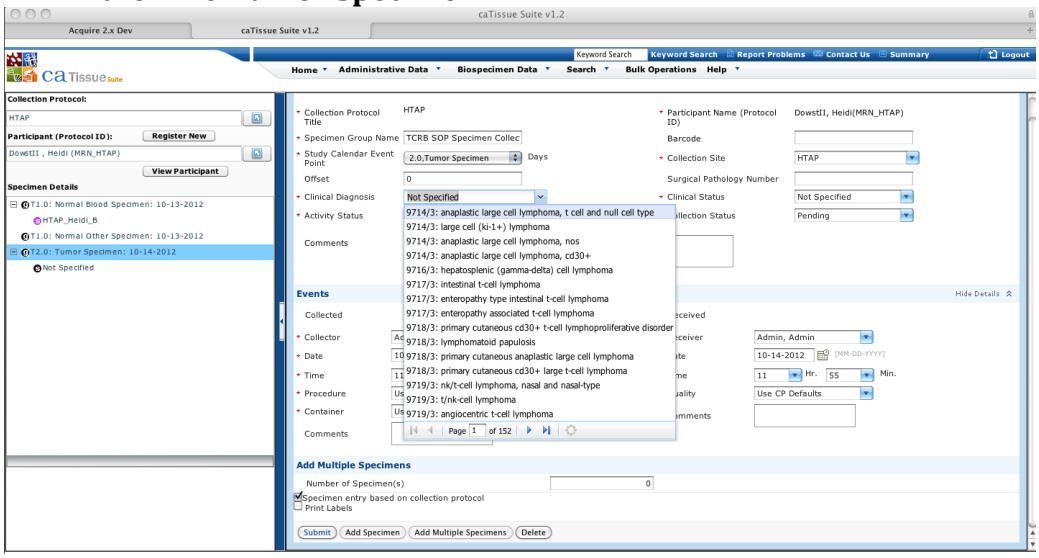


L. Click the **Submit** button. A message will appear in green at the top of your screen, "*Fluid Specimen Successfully Updated*."

4. Logging a Tumor Specimen

A. Return to the Collection Protocol Based View if you are no longer there. Select your collection protocol (group) and participant from the drop downs.

B. In the specimen details section on the left hand side of the screen, **click on the T2.0 Tumor Specimen.**

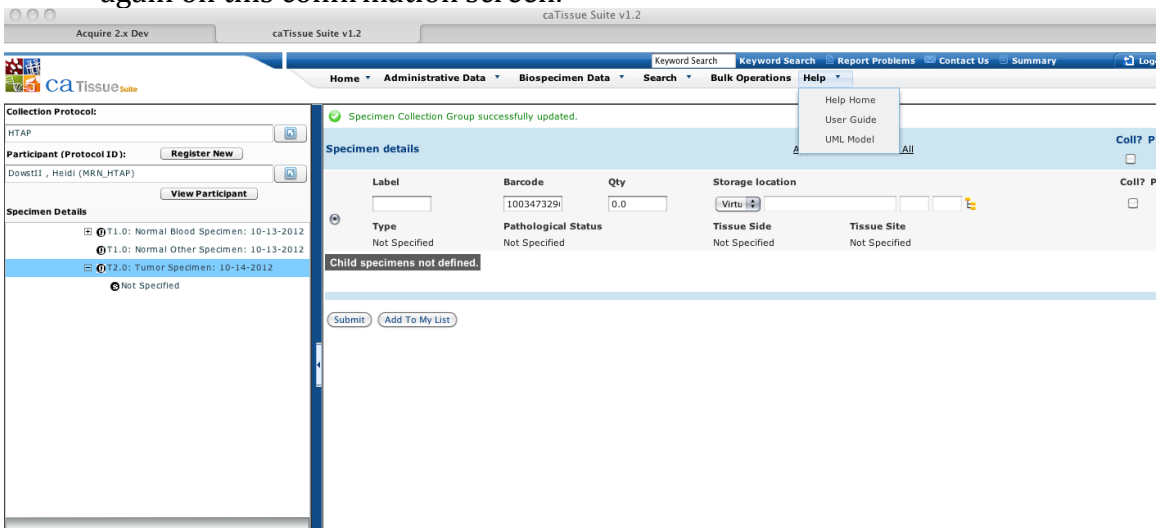


C. **Select the Clinical Diagnosis** from the drop down list. You can type the words or codes in this field and they will populate the list to those results that match.

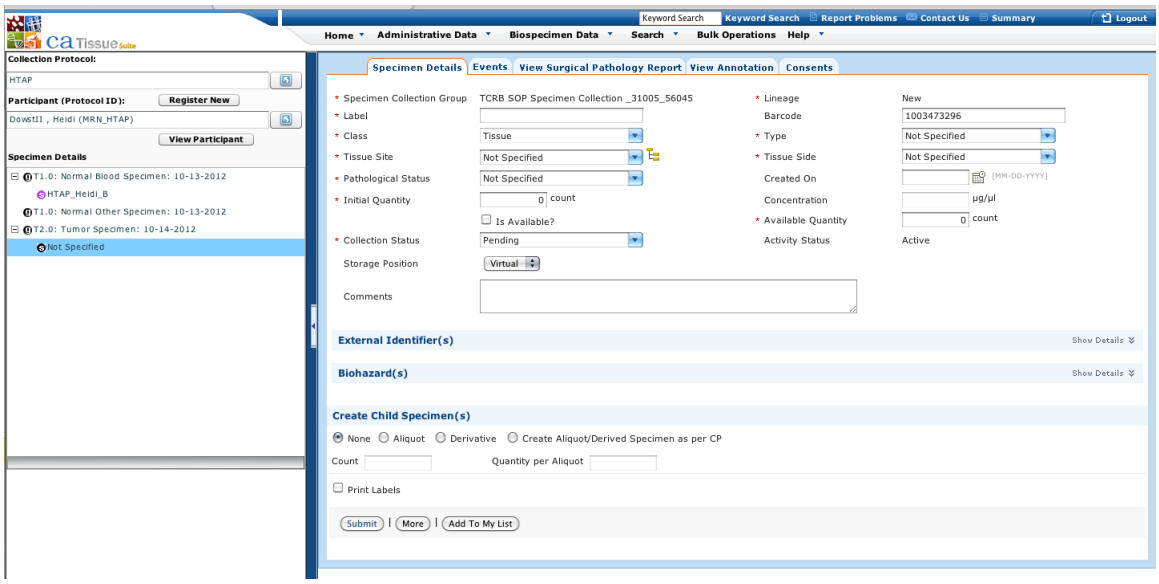
D. **Select the Collection Site,** if not selected.

E. **Select the Container** type from the Container drop down list.

F. **Click Submit,** a message in green will appear on a confirmation screen saying that the specimen collection group has been updated. **Click Submit** again on this confirmation screen.



G. You have now entered the tumor specimen collection group

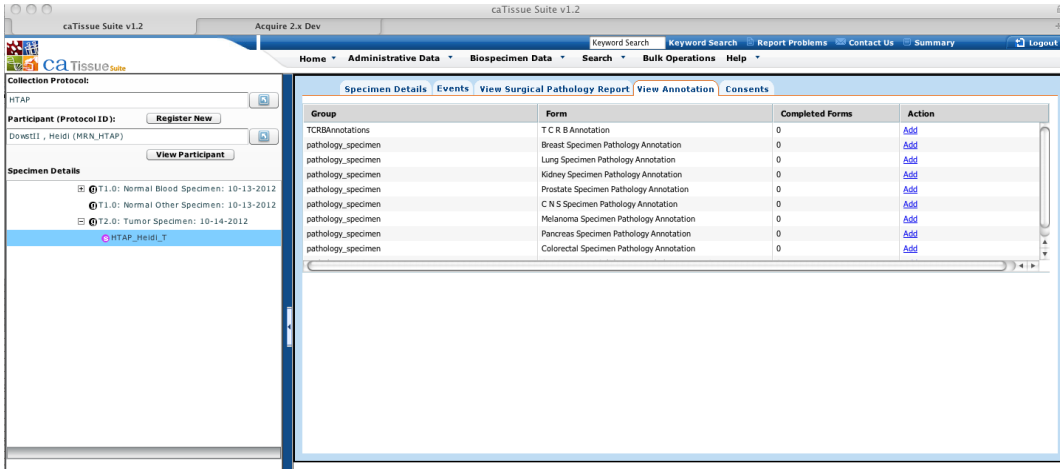


H. Click on the **Not Specified** Specimen below the Tumor Specimen collection Group. The window on the right will now have specifics about the tumor specimen. **Enter a Label and Barcode in the appropriate field** (remember this can be customized to auto-fill for your site).
I. Select the **Tissue Type** from the Type drop down list.
J. Indicate the Tissue Site or place that the specimen was taken from in the **Tissue Site** drop down list. This list will also auto-populate as you begin typing.
K. In the **Pathological Status** field indicate if this is a **Primary Tumor** or **Metastatic.**
L. Enter the specimen quantity in mg in the **Initial Quantity** field.
M. Change your **Collection Status** to Collected.
N. Click on **Submit.**
O. A message saying, Tissue Specimen successfully updated will appear. You have now logged your specimen, and it will appear pink in your display.

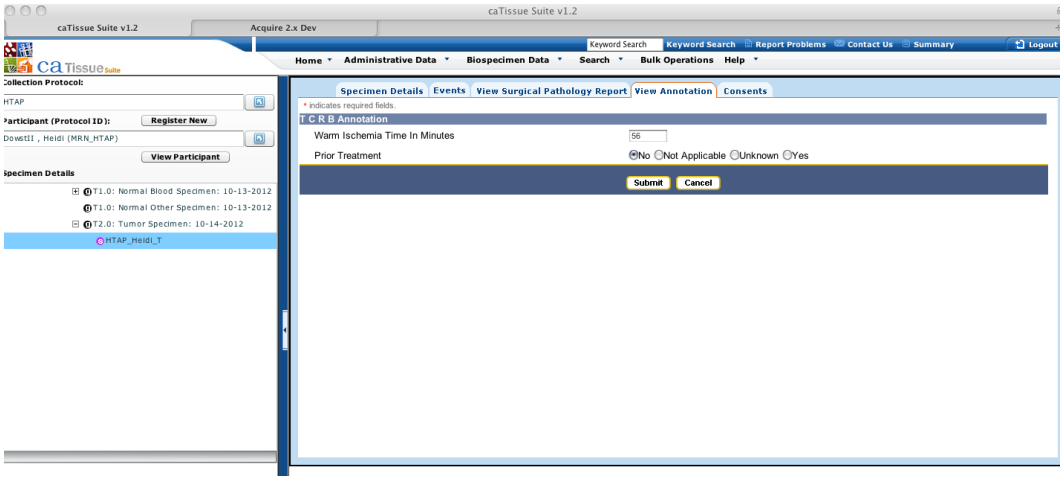
5. Annotating the Specimen

A. Using the specimen created above, we will add TCRB specific annotations. Return to the specimen, there is a set of tabs for your specimen: Specimen Details (previously used above), Events, View Surgical Pathology Report, View Annotation, and Consents.

B. For this purpose, **Click on the View Annotation tab**.



C. The first record in the list is TCRB Annotations. Click on the Add link at the end of the record.



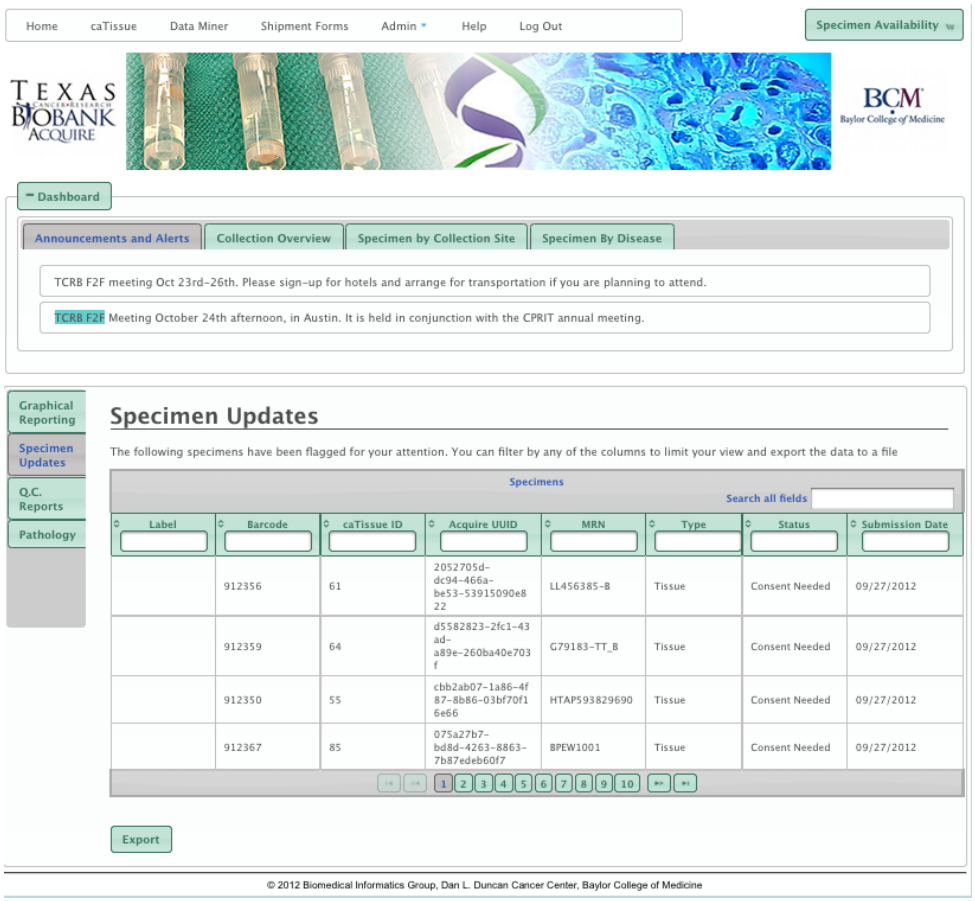
D. Enter the Warm Ischemia Time in the field in minutes. This is the time from devascularization to freezing. Toggle if the patient had received prior chemotherapy or radiation treatment before the specimen was collected.
E. Click the **Submit** button. The screen will now show a Edit link. This is the entry you have made. To change the values, click on the Edit link. Clicking on the Add link will now add another value for a different time point.
F. Your specimen has been logged and annotated. It will now show up in Acquire. Acquire can be reached by clicking on Home in the navigation bar and following the link to Acquire Training.

Checking Specimen Status, Reports and Entering Pathology in Acquire2

Contents:

2. Entering Pathology
3. Searching Miner

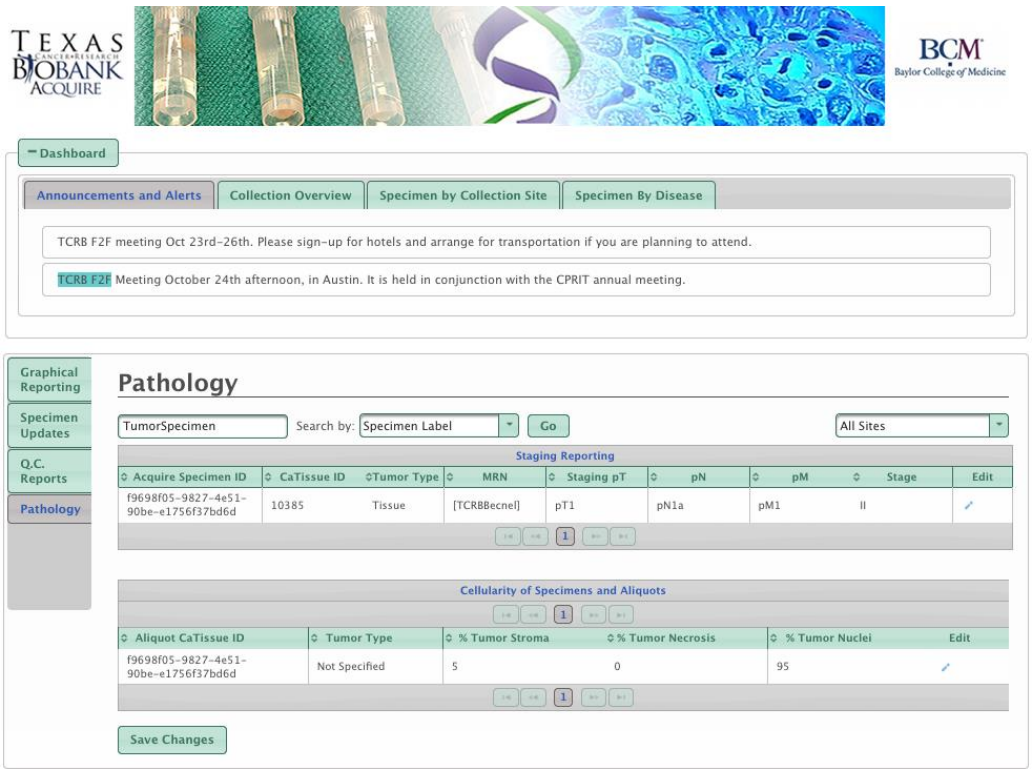
1. Viewing Specimen Updates:



Specimen updates are pushed to each user based on their collection site. Only specimen that has a status flag (Consent needed, Awaiting Pathology, TCGA qualified, etc.) will appear in this window. This window is like a to do list. It indicates specimen that has data missing or some action can be taken.

Searching the report: You can search the report for a specific specimen by typing the search element in the search field.

Filtering: Each column can be used to filter the report. Only specimen meeting the filter you indicate will be shown. You can narrow your filter by adding a filter on a second column.



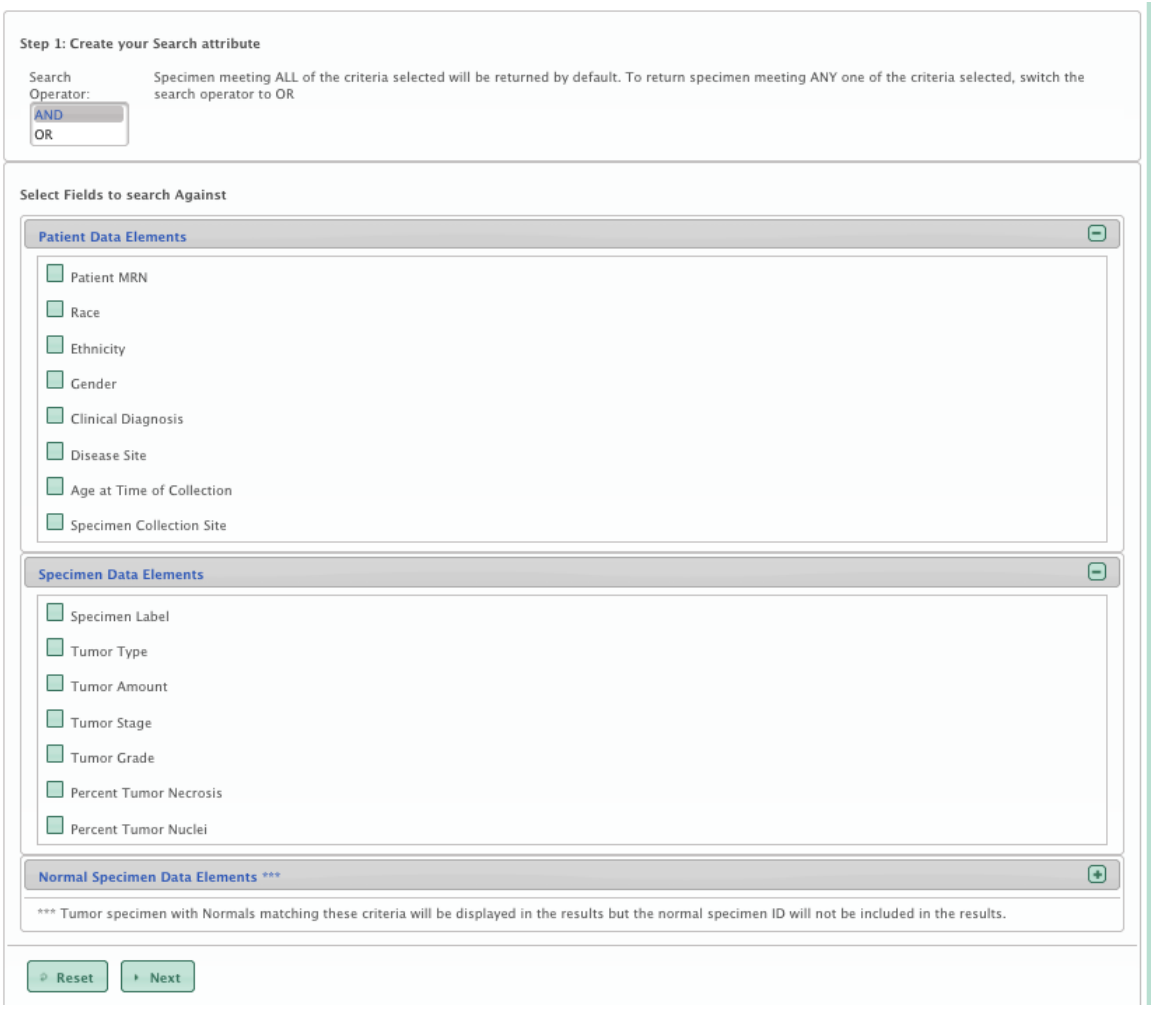
2. Pathology Data

Entering Pathology Data: Specimen appears in the first window, while specimen and children specimen appear in the second window. This allows for annotation of staging to be placed on the parent specimen and cellularity to be placed on both specimen and aliquots.

Edit Data: Click on the pencil to edit data

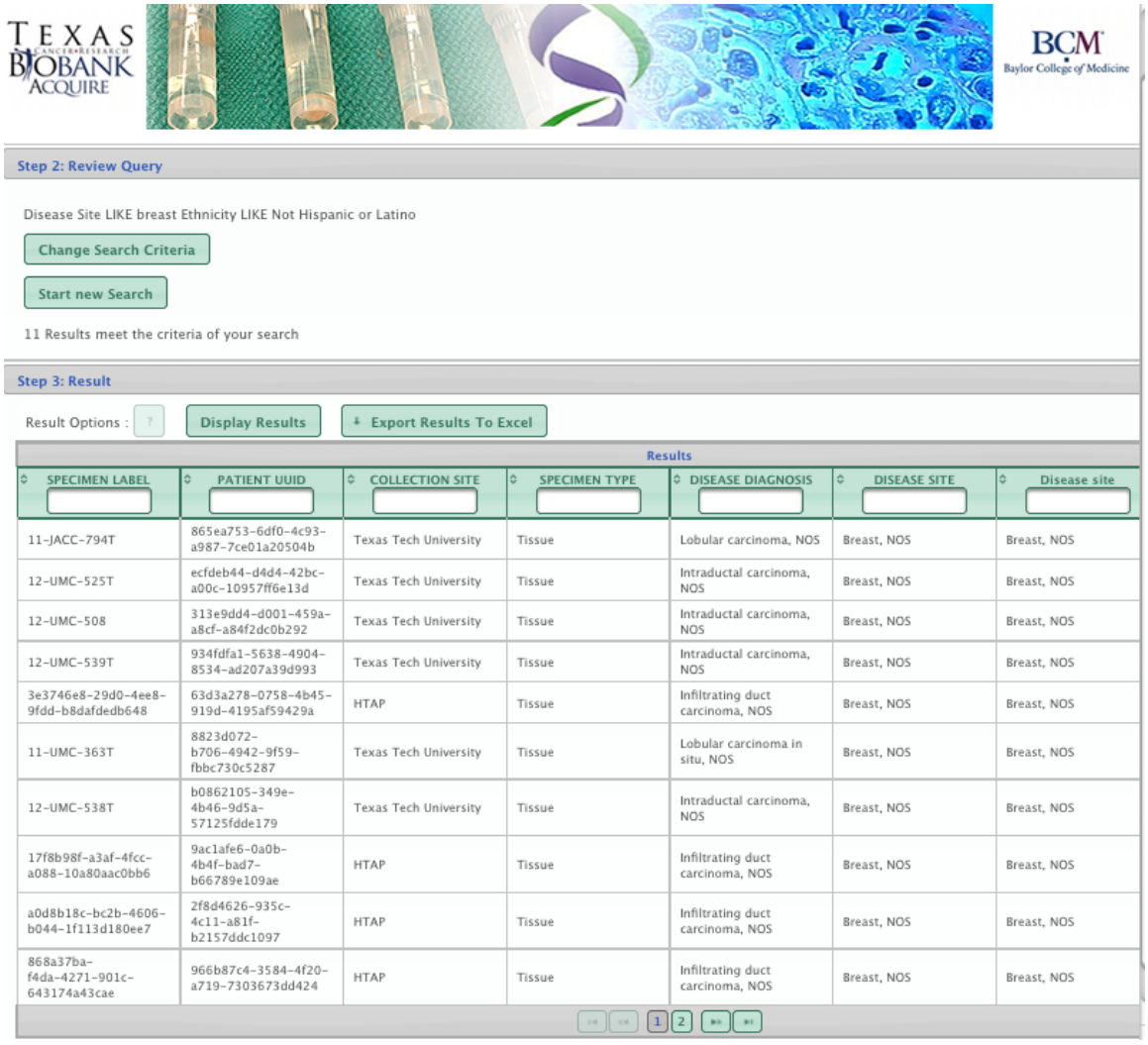
Save Data: Click on the check mark icon to save data for each row. When you are finished with the page, click on Save Changes.

3. Data Miner: Searching for Specimen by Annotations



Data Miner: You can find specimen through data miner based on multiple criteria.

1. Check the box next to the criteria you want to use
2. A data entry field and operator will appear. Type in the criteria you wish to use.
3. Click the Add button to add the criteria.
4. To add additional criteria, repeat the process.
5. Check another box to add additional criteria to the search.
6. Click Next.



Data Miner Results:

1. The number of results is returned in the Step 2. Section
2. To modify your search Click, Change Search Criteria
3. To display the search results, click Display Results in the section titled, Step 3

Results can also be exported by clicking the Export Results to Excel button.

TCRB Acquire RAC Module User Guide

1. RAC Requestor

A. Requestor: Applying for Specimen (Apply for Specimen Button)

1. From the Home page, users may apply for specimen by clicking on the *Apply for Specimen* selection in the navigation bar at the top of the screen.
2. Applications can be saved with only minimal information such as name, project title and email.
3. The required fields for saving an application have asterisk symbols next to the field.
4. Complete saving the application by clicking the *Save and Edit Later* button at the bottom of the form.
5. You will receive an automated email indicating your application has been saved.

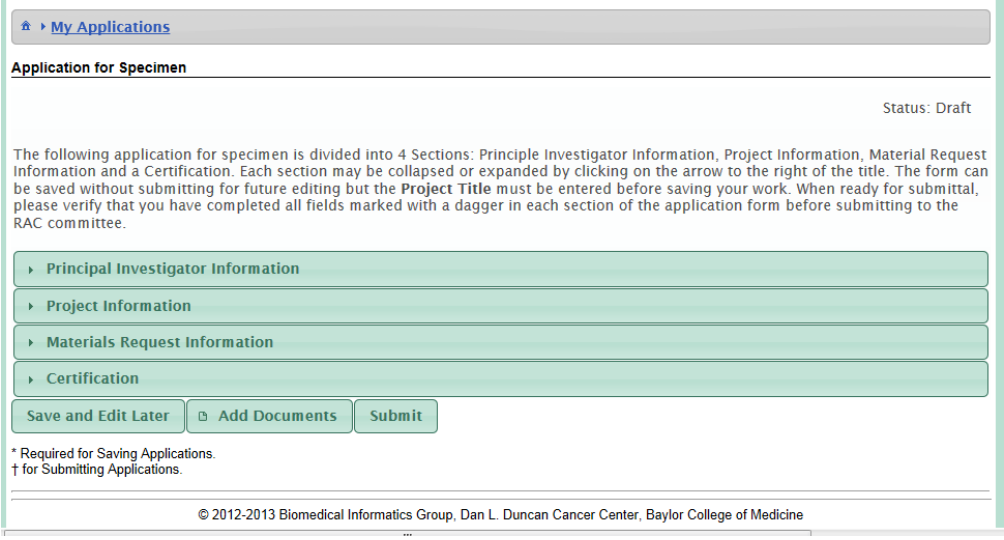


Figure 1. Application Form

B. Requestor: Editing a Saved Application

1. Once an application has been saved, it can be viewed by clicking the *My Applications* selection under the *My Account* button in the menu bar.
2. Clicking on *My Applications* will display all applications that have been created by you. All applications are displayed here by title and status.
3. If you would like to edit a particular application, click on the *Title* of the application and it will open. Note that once an application has been approved, it will no longer be editable by the submitter.

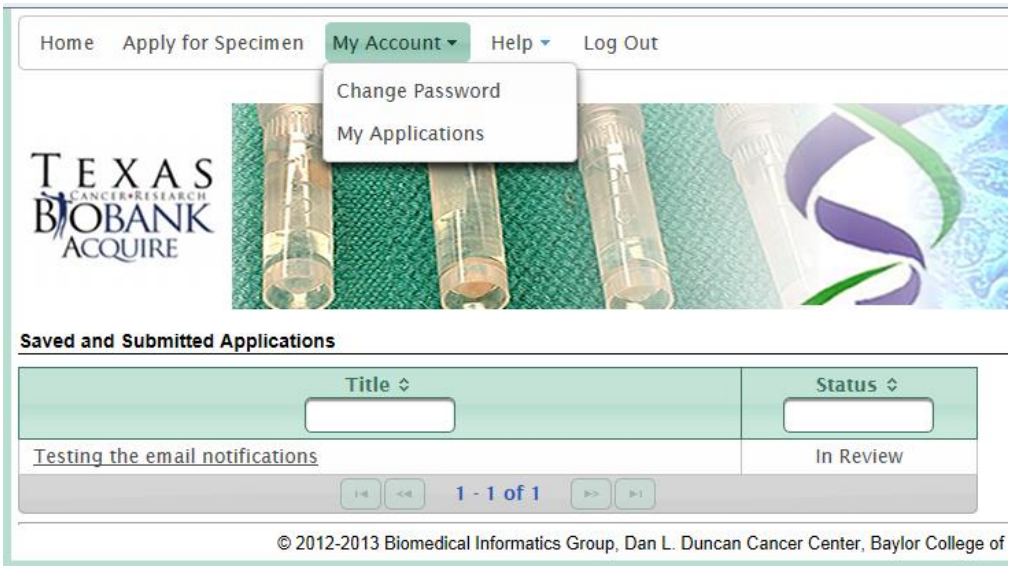
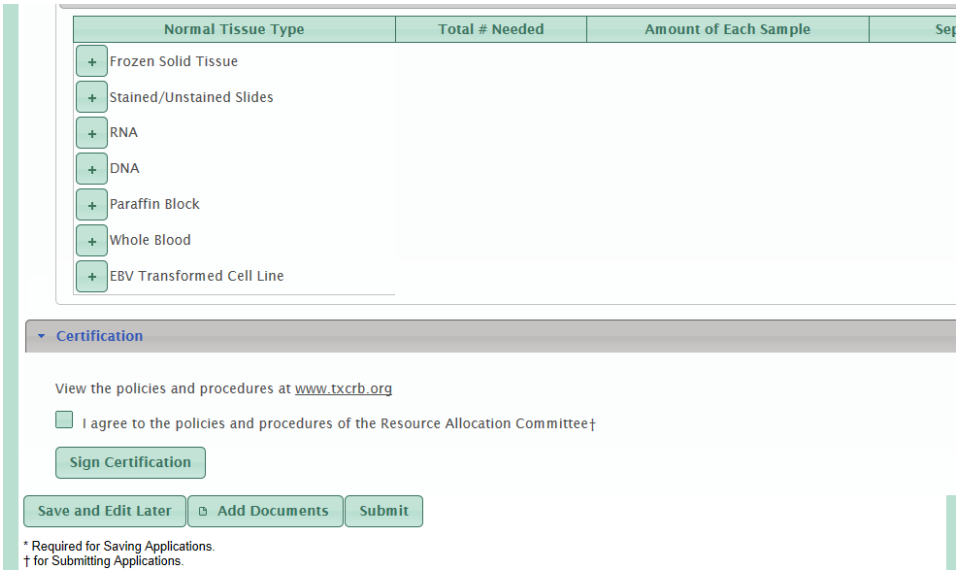


Figure 2. Finding and Editing Existing Applications

C. Requestor: Submitting an Application

1. In order for an application to be submitted, all fields marked with a dagger (†) symbol must be completed. If you have questions about the application fields please contact, info@txcrb.org
2. After completing all these fields, including signing the certification, click the *Submit* button at the bottom of the application screen.
3. Both the submitter of the application and the RAC Coordinator will receive an automated email indicating the application has been submitted.
4. Each time the information contained in or the status of your application changes, the submitter will receive an automated email indicating this information.



2. RAC Coordinator

D. RAC Coordinator: Inbox Request Notifications

1. Once an application has been submitted, the RAC Coordinator will receive an automated email indicating the application has been submitted.
2. From the home screen, click on the *RAC tab* on the left side of the screen. All applications with the status of Submitted, In Review and Approved appear in the RAC Coordinator's inbox located in this tab.

   Figure 3. Submitting an Application Form

3. The Coordinator can also by clicking on the *Vote* button, or use it to vote by proxy for another reviewer. The coordinator is also able to attach documents to the application using the *Add* button on the right side of the screen.

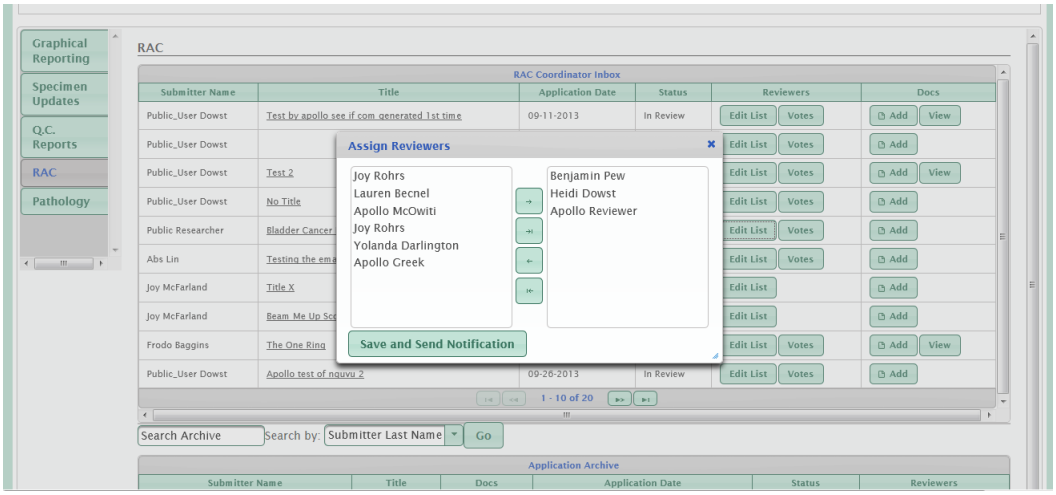


Figure 4. Assigning Reviewers to an Application

E. RAC Coordinator: Assigning a Request to Reviewers

1. From the RAC Inbox view, click on the *Edit List* button in the Reviewers column toward the right side of the screen. See Figure 4.
2. Assign Reviewers by clicking on their name in the left column, and then the right facing arrow. Reviewers can be added or removed one at a time or as a complete list by using the Add (>) or Delete (<) arrows.
3. Once the appropriate reviewers are selected, click the *Save and Send Notification* button at the bottom of the window. This sends an automated email to each reviewer containing the Project Title in the subject and project summary for them to review.

F. RAC Coordinator: Viewing Votes and Notifying Collection Sites

1. Once assigned reviewers have voted on application, their votes are viewable within the RAC Inbox.
2. Navigate to the *Reviewers* column on the right side of the inbox and click on the *Votes* button. Clicking on this displays a pop-up window which will display the names of all the reviewers assigned to this application. If the reviewer has voted, a Yes or No will display next to their name in the right hand column.
3. Once the rules for quorum voting has been met, the RAC coordinator can change the status of the application to Approved by clicking on the application title and changing the drop down status from In Review to Approved. Once the status is changed, you must click *Save Changes* at the bottom of the Application for the status change to take effect.
4. Miner can be used to identify the specific specimen which meets the specimen request criteria and then the RAC Coordinator sends notification to the collection sites for distribution. This notification is not automated through Acquire.
5. An application will continue to appear in the RAC coordinator's inbox until the status of the application is change to either Distributed or Rejected. Once the status is changed to either of these values, the application is held in the archive. The application can be retrieved by searching for the title in the archive search found below the RAC coordinator Inbox.

3. RAC Reviewers

G. RAC Reviewer: Notification and Options for Voting

1. As a reviewer assigned to an application, you will receive an automated email containing the Project Title in the subject and a summary of the application.
2. If the information contained in the email is sufficient for you to vote on the application, you are able to do so directly from the email. Links are embedded in the email that grants the ability to Vote Yes or Vote No. Clicking on the Vote Yes or Vote No button will take you to a web screen which does not require login. You must have internet access for this to work. Please also close the web page after voting to maintain the security of your vote.
3. Until the application is changed to an approved status you may edit your vote, but once the application has been approved, you are no longer able to change your vote.

4. When logged into Acquire additional voting options are available. Within the RAC tab on the homepage of Acquire, reviewers will see a list of all open applications which have been assigned to them. The application can be opened by clicking on the application title hyperlink. After reviewing the complete application, reviewers can return to the home page and log their vote by Clicking on the RAC tab then the Vote button on the row associated with that application.

H. RAC Reviewer: Reviewing Applications in Acquire and Comments

1. All applications assigned to you are viewable within the *RAC Inbox o***f the Acquire homepage**. Click on the *Title* of the application wanted for review to open it.
2. At the bottom of the application, below the *Save Changes* button, there is a place for Reviewer Comments, see Figure 5. The comments section is visible only to the RAC coordinator and reviewers. The purpose of this area is to track conversations or requests for additional information on the application. When a comment is added to an application, all RAC members assigned as reviewers and the submitter will receive an automated email indicating a comment has been added. When a reply is made, an email also goes out notifying the review group.

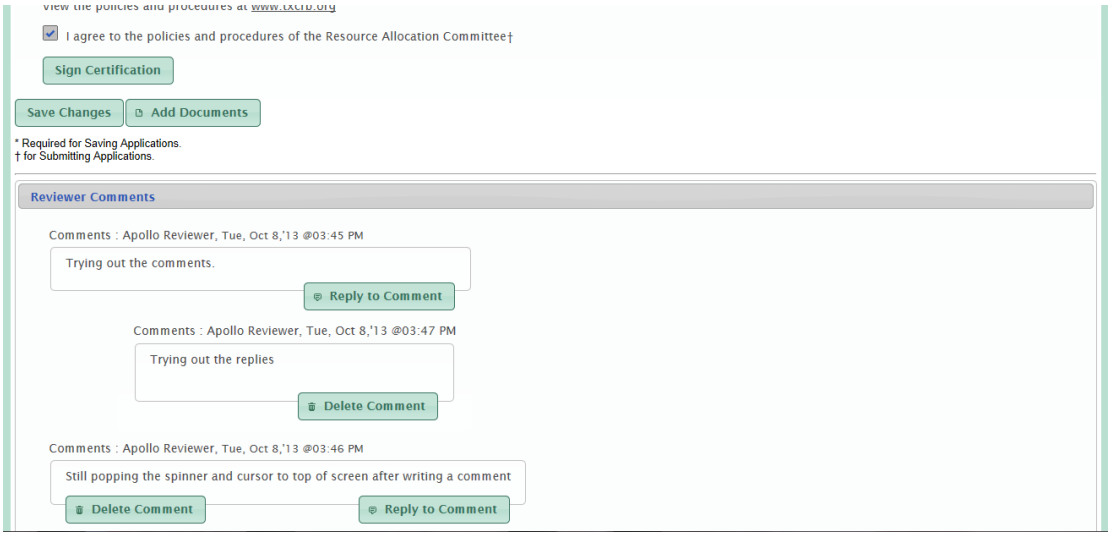


Figure 5. Reviewer's Comments