# Unity Next • Quick Reference Guide

## Access to Unity Next

### User Types and Permissions

Access to activities and settings within Unity Next is assigned by laboratory roles and for user management activities.

#### User Management Roles

- Account User Managers have access (only) to add, edit and delete users for any group or location.
- Laboratory User Managers have access to add, edit or delete users for any location within their group. Lab User Managers also have Lab Supervisor access for their default location. (See below for a description of Lab Supervisor access.)

#### Lab Management Roles

Laboratory Supervisors, Lead Technologists and Technologists have access to laboratory activities and settings within Unity Next as described below:

| | **Unity Next Activities and Settings** | | | | | | |
|---|---|---|---|---|---|---|---|
| | **Manage Users, Groups, Locations** | **Lab Setup** | **Settings, Rules, Archive, Start New Lot, Mean & SD** | **Panels and Sorting** | **Data Entry** | **Charts and Reports** | **File Upload** |
| **Roles** | **Access Description** | | | | | | |
| **Lab Supervisor,** **Lead Technologist** | No | Full, except Lead Tech cannot delete | Full | Full | Full | Full | Full |
| **Technologist** | No | No | View only | Full, except cannot delete | Full, except cannot restart float | Full | Full, except cannot edit configuration |

### Supported Browsers and Sign In

1. Ensure you are using one of these supported browsers to access Unity Next:
   - Google Chrome
   - Microsoft Edge
   - Mozilla Firefox
2. Open a web browser and go to **https://unity.qcnet.com.**
3. Sign in with your username (email address) and chosen password.

   *Note: After login, you will be automatically logged off after 15 minutes of inactivity. An option to keep your session active will appear 5 minutes before you are logged off.*

## Setup

**Lab Supervisor:** Full access • **Lead Technologist:** Limited access (cannot delete) • **Technologist:** No access

### Add Department

1. Type in Department Name(s).
2. Click **Add Departments** at the bottom.

### Add Instrument

1. Use the drop-down to select **Instrument manufacturer.**
2. Use the drop-down to select **Instrument model.**
3. If you have more than one instrument, it is often useful to include a **Custom name** and/or **Serial number.**
4. Click **Add Instruments** at the bottom.

### Add Bio-Rad Control

1. Use the drop-down to select the **Control Name.**
2. Use the drop-down to select the **Lot Number.**
3. Click **Add Control** at the bottom.

### Add Analytes

1. Select the **Levels in use.**
2. Select the types of Reagents and Calibrators in use.
3. Select the Analytes.
4. Under analyte setup, complete the blank fields (e.g. Unit).
   - If your Analyte(s) is not currently available in the drop-down list, click **Don't see your analyte?**, attach documentation, and submit. Bio-Rad will verify the information and add it to the database.
5. Click **Add Analytes** at the bottom.

## Add Users

***Account User Manager*** or ***Lab User Manager*** access is required.

1. At the top right of the screen, click the cog wheel icon and select **User Management.**
2. Click **Add User.**
3. Enter the user's name and email address.
4. Select the user's Role and Location. See *User Types and Permissions* above for descriptions of user roles.
5. Click **Add**.
6. Click the **X** in the top right corner to return to the Dashboard.

## Add Panels

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full, except cannot delete

*Panels provide a way to group a set of analytes across Departments, Instruments and Controls according to the way you want to view and enter data within your Unity Next lab. For example, you can make data entry easier by using a panel to group together multiple instances of the same analyte, even if they are found across different Departments, Instruments or Lot numbers within your lab.*

*You can add a single test to multiple panels or sort multiple analytes within a single panel. Panels can be edited or custom sorted, as needed, and you can choose to show or hide archived items in your panels.*

1. If applicable, click **Unity Next** in the top left corner to return to the Dashboard.
2. Click **Add a Panel** located at the top of the left navigation.
3. Type a name for your panel in the Panel name field.
4. Select which items to include in your Panel by selecting the applicable boxes.
   - Click the **>** symbol to the left of a Department to expand the list and view its Analytes.
   - Click the **>** symbol to the left of an Instrument to expand the list and view its Controls.
   - Click the **>** symbol to the left of a Control to expand the list and view its analytes.
     – The selected analytes appear on the right side of the screen under Panel items.
5. To remove an item from the Panel, uncheck the applicable blue box in the list of items.
6. Click **Save**.

## Edit or Delete Panels

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access, except cannot delete

1. If applicable, click **Unity Next** in the top left corner to return to the Dashboard.
2. Click the panel name at the top of the left navigation.
3. Click **Edit this Panel**.

4. Click the red trash can to delete the panel, or
5. Select the items to include or delete from your Panel by selecting the applicable boxes.
   - Click the **>** symbol to the left of a Department to expand the list and view its Analytes.
   - Click the **>** symbol to the left of an Instrument to expand the list and view its Controls.
   - Click the **>** symbol to the left of a Control to expand the list and view its analytes.
     – The selected analytes appear on the right side of the screen under Panel items.
6. To remove an item from the Panel, uncheck the applicable blue box in the list of items.
7. Click **Save**.

## Set Up SPC (Westgard) Rules

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** View only

*Typically, if you are evaluating quality control results outside of Unity Next, or entering Summary data, you do not need to set up SPC rules. Instead, proceed to the next section to set up Unity Next for data entry type.*

*Note: While selecting rules for each individual test is considered best practice, the most efficient way to set up rules is to select* **Rules** *at the control level, then edit the individual associated analytes, as needed. Control level rule settings are applied to every analyte run using that control lot.*

### Control Level

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.
4. Click **Edit this Control** at the top of the screen.

   *Note: If necessary, select the Point radio button for the type of data entry.*
5. For each rule, select the **Reject** column or the **Warning** column based on how you want Unity Next to evaluate your data.
   - **Reject** column selected: Data rejected after evaluation turns red and will not be included in statistics.
   - **Warning** column selected: Data that is close to violating the rule turns yellow to show a potential problem and will be included in statistics.
   - **Disable** column selected (default): The rule will not be applied to your data, so no evaluation results will be included in statistics.
6. Click **Update.**

### Analyte Level

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.

4. Select an Analyte.
5. Click **Edit this Analyte** at the top of the screen.

   *Note: If necessary, select the Point radio button for Type of data entry.*
6. For each rule, select the **Reject** column or the **Warning** column based on how you want Unity Next to evaluate your data.
   - **Reject** column selected: Data rejected after evaluation turns *red* and will not be included in statistics.
   - **Warning** column selected: Data that is close to violating the rule turns *yellow* to show a potential problem and will be included in statistics.
   - **Disabled** column selected (default): The rule will not be applied to your data, so no evaluation results will be included in statistics.
7. Click **Update.**

## Set Up Evaluation Means and SDs

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** View only

*By default, the software will use floating means and SDs to evaluate your QC once 10 data points have been entered in the software.*

1. From the left navigation, select a Department.
2. Select the Instrument.
3. Select the Control Name.
4. Select the Analyte.
5. Click **Edit this Analyte** at the top of the screen.

   *Note: If necessary, select the Point radio button for Type of data entry.*
6. Click **Set Values**.
7. To enter fixed statistics, select the Fixed radio button and type in your values.
8. To use floating statistics to set a new fixed mean and SD, toggle **Use floating statistics to set new fixed mean and SD** to on and then select Cumulative, Last 30 Days, Last 60 Days or Last 90 Days.

   *Note: If there are any values for which you do not want to use the new fixed value, you can select the Float radio buttons for both Mean and SD.*

## Set Up Data Entry Type, Test Levels, and Decimals

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** View only

*Best practice: Enter one decimal place more than you include in patient results. As with SPC Rules, levels in use and decimal places may be defined at either the control or analyte level.*

### Control Level

1. From the left navigation, select a Department.
2. Select the Instrument.
3. Select the Control Name.
4. Click **Edit this Control** at the top of the screen.
5. Click either the **Summary** or **Point** radio button to choose **Type of data entry.**
6. Select which levels you use for this QC product.
7. Select the number of decimal places you need to enter.
8. Click **Update.**

### Analyte Level

1. From the left navigation, select a Department.
2. Select the Instrument.
3. Select the Control Name.
4. Select the Analyte.
5. Click **Edit this Analyte** at the top of the screen.
6. Select which levels you use for this analyte.
7. Select the number of decimal places you need to enter.
8. Click **Update.**

## Means and SDs

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** View only

### Use Floating Means/SDs

*Note: The software will use floating statistics to evaluate data if fixed statistics are not present.*

1. From the left navigation, select a Department.
2. Select the Instrument.
3. Select the Control Name.
4. Select the Analyte.
5. Click **Edit this Analyte** at the top of the screen.

   *Note: Select the* **Point** *radio button.*

6. Click **Set Values.**
7. For Float points, define the number of points needed before rule evaluation is initiated using floating statistics.
8. Click **Update.**

### Use Fixed Means/SDs

1. From the left navigation, select a Department.
2. Select the Instrument.
3. Select the Control Name.
4. Select the Analyte.
5. Click **Edit this Analyte** at the top of the screen.

   *Note: Select the* **Point** *radio button.*
6. Click **Set Values.**
7. If applicable, toggle **Use floating statistics to set new fixed mean and SD** to on which will reveal options for **Float type.**
8. Under **Float type**, use the drop-down menu to select Cumulative, Last 30 Days, Last 60 Days or Last 90 Days of data for use to set fixed mean and/or SD.

   *OR*
9. Enter values for **Fixed Mean** and **SD** or **CV** for each level in use.
10. Click **Update.**

## Start a New Product Lot

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** No access

*When starting a new lot of control material, Unity Next duplicates the current lot to the instrument, or even across multiple instruments which are the same model from anywhere in your lab. The new lot number is set up in the same way as the old lot number, but the new lot will not have any QC data.*

1. From the left navigation, select a Department.
2. Select the Instrument.
3. Select the Control Name.
4. Click **Edit this Control** at the top of the screen.

   *Note: You will also see a notice in the data table indicating if a lot is expiring or has expired. Start at Step 5 to start a new lot from the data table location.*
5. Click **START NEW LOT** at the bottom left of the screen.
6. Select the new lot number from the **Select Lot** drop down menu.
7. If applicable, check the box to **Retain fixed CV where set.**

8. Click the radio button to choose to run the new lot **On this instrument** or **On multiple instruments.**

   • **On this instrument:** Starts a new lot on the current instrument:

   – Same analyte settings

   – Same rule selections

   – No QC data

   • **On multiple instruments:** Starts a new lot on the current instrument and on other instruments that are the same model and are already running the current lot.

   – Same open analytes

   – Same analyte settings

   – Same rule selections

   – No QC data

   *Note: If a new lot of a current control is not available, you will not see the* **START NEW LOT** *option.*

9. For **On multiple instruments**, click the checkbox(s) to select the instruments that will receive the new lot.
10. Click the **START NEW LOT** button in the lower right.

## Manage Expiring Lots

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** No access

*Lots that will expire within 45 days are shown on the Dashboard in the* **Expiring lots** *card. Lots that are already expired appear in red text at the top of the list. Lots expiring today or tomorrow also appear in red text. The total number of lots expiring is shown at the top of the card, however the* **Expiring lots** *card with list does not appear if no lots are expiring within 45 days.*

*Additionally, you will see a notice within the data table that a lot is expiring or has already expired.*

*Note: If a lot is used more than once in your Unity Next lab, the number of times the expiring lot is used is shown at the end of the name. For example, for "Cardiac Markers Plus LT (4)," this lot of Cardiac Markers Plus LT is currently in use on four (4) instruments within Unity Next.*

1. From the Dashboard, click on the name of the lot you want to update from the list shown on the **Expiring lots** card.

   *Note: From the data table, click* **START NEW LOT.**

2. Select the new lot to replace the expiring lot from the **Select Lot** drop-down menu.
3. Confirm if you want to use the new lot **On this instrument** or **On multiple instruments**. The blue radio button defaults to on at the current setting of the expiring lot.

   • For **On multiple instruments,** a list of all instruments that currently use the expiring lot is shown.

4. If needed, make a new selection for **On this instrument** or **On multiple instruments**.
5. If applicable, click **Retain fixed CVC where set.**
6. Click **START NEW LOT**. (The expiring lot will no longer be shown on the **Expiring lots** card or in the data table.)

## Archive Department/Instrument/Product/Analyte

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** View only

*You can unarchive departments/instruments/controls/analytes to view, print, or change data. To view archived items, return to the Dashboard and toggle on* **Archived items** *from the left Navigation Panel.*

*Archived departments/instruments/products/analytes are not available for data entry or data submission to Bio-Rad. However, archived departments/instruments/controls/analytes remain in the Unity Next database.*

*Archiving at a higher level (e.g. at the Control level), will archive everything below it (e.g. all analytes for that Control).*

### Archive Department

1. From the Dashboard, select the name of your lab to view the Departments in that lab.
2. Click the down arrow (v) on the Department's card.
3. Toggle **Archive department.**
4. Click **Update.**

### Archive Instrument

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Click **Edit this Instrument** at the top of the screen.
4. Toggle **Archive instrument** to on at the bottom of the screen.
5. Click **Update.**

   *Note: To unarchive, toggle* **Archive instrument** *to off.*

### Archive Control

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control Name.
4. Click **Edit this Control** at the top of the screen.
5. Toggle **Archive control** to on at the bottom of the screen.
6. Click **Update.**

   *Note: To unarchive, go to the level and toggle* **Archive control** *to off.*

### Archive Analyte

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control Name.

4. Select an Analyte.
5. Click **Edit this Analyte** at the top of the screen.
6. Toggle **Archive analyte** to on at the bottom of the screen.
7. Click **Update.**

   *Note: To unarchive, go to the level and toggle* **Archive analyte** *to off.*

### Edit Instrument

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** No access

#### Copy an Instrument

*Instruments (including settings) can be copied between Departments.*

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Click **Edit this Instrument.**
4. Navigate down to the **Copy this instrument** card.
5. Choose into which Department to copy using the **To department** drop-down menu.
   - If this instrument model already exists in the chosen Department, you will need to enter a custom name into the **Custom name (optional)** field.
6. Click **Copy.**

### Custom Sort

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access, except cannot delete

*Your Departments, Instruments, Controls, Analytes or Panels can be listed in the left navigation in the order you choose. For example, you can group multiple lots of the same Control together within the left navigation list.*

1. Click **Sort** in the left navigation panel to arrange Departments, Instruments, Controls, Analytes or Panels in the order you would like to view them.
   - Drag and drop the items in the list to view them as you need to.
   - Click the **A-Z** button to go back to alphabetical order (default).
   - Click the **CANCEL** button to revert to the current list order.
2. Click the **DONE** button to save changes.

## Data Table

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access, except cannot restart float

### Enter Summary Data for Single Test (Analyte)

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.
4. Select an Analyte.
5. Click **Manually enter data.**
6. Click the calendar icon and select a date within the month the data you will be entering was generated.
   - The default setting is for the previous month, so it is important that you change the date to the correct month for your data.
7. Type the values (average **Mean**, average **SD**, and total number of **Points**) for each level.
8. If needed, click the down arrow (⌄) on the right of the yellow card to make selections from the drop-down lists which update the **Reagent lot** or **Calibrator lot**. Click and type into the **Add a Comment** field to add your own text for future reference.
9. Click the green **SEND TO PEER GROUP** button to submit the data to Bio-Rad.

### Enter Point Data for Single Test (Analyte)

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.
4. Select an Analyte.
5. Click **Manually enter data.**
6. The default is the current date. If needed, click **Insert a different date** and click the calendar icon to select the date the QC was run.
7. Enter the time at which you ran the data.
8. Enter the values for each level.
9. If needed, click the down arrow (⌄) on the right of the yellow card to make selections from the drop-down lists to update the **Reagent lot** or **Calibrator lot.**
10. If documentation is needed, make a selection from the **Corrective action** drop-down menu and/or click and type into the **Comment** field to add your own text for future reference.
11. Click the green **SEND TO PEER GROUP** button to submit the data to Bio-Rad.

### Edit Summary Data

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.
4. Select an Analyte.
5. Click on the row of data.
6. If needed, type corrected values into the fields (average **Mean**, average **SD**, and total number of **Points**) for each level.
7. If needed, make selections from the drop-down lists to update the **Reagent Lot** or **Calibrator Lot,** or click **Don't see your calibrator lot?** or **Don't see your reagent lot?** to submit the missing item to Bio-Rad.
8. If documentation is needed, click and type into the **Add a Comment** field to add your own text for future reference.
9. To delete the row of data, click the red trash can icon in the center of the screen.
10. Click **Submit Updates.**

### Enter Data for Multiple Analytes on Same Product (Control)

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.
4. The default is the current date. If needed, click **Change Date** and then select the date the QC was run.
5. Enter the time at which you ran the data.
6. Enter the values for each level.
7. If needed, click the down arrow (⌄) on the right of the yellow card to make selections from the drop-down lists to update the **Reagent Lot** or **Calibrator Lot.**
8. If documentation is needed, click and type into the **Add a comment** field to add your own text for future reference.
9. Repeat the steps to enter data for any other Analyte(s) that have already been added for the selected Control.
10. Click the green **SEND TO PEER GROUP** button to submit the data to Bio-Rad.

### Edit or Add Documentation for Point Data

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.
4. Select an Analyte.
5. Click on the row of data.

6. If needed, type corrected values into the fields for each level.
7. If needed, select **Accept** or **Reject** to manually change the status of a result.
   - Only accepted results are included in your statistics.
8. If needed, click the down arrow (v) on the right of the yellow card to make selections from the drop-down lists which update the **Reagent Lot** or **Calibrator Lot.**
9. If needed, select an action and/or type in a comment in the **Choose an action** drop-down menu and/or click and type into the **Add a comment** field to add your own text for future reference.
10. Click **SUBMIT UPDATES**.

# Charts

### Create and View a Levey-Jennings Chart

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access

*The Levey Jennings chart is helpful to visually identify shifts (sudden changes) and trends (gradual changes) in laboratory data. "L-J" charts are located at the Analyte level when using the Point data entry type.*

*The Analyte must have at least as many data points as your minimum setting to start rule evaluation. The Levey-Jennings chart is populated by the data points from the data table below the chart. There are many options to choose from to view and analyze your data.*

Follow these steps to create and view an LJ chart:

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Select a Control.
4. Select an Analyte.

   *Note: Levey-Jennings charts are available with the Point data entry type only.*
5. If it is not already visible, click to select the check box for Levey-Jennings located at the top of the page. The mini-LJ chart appears on the left.
6. Click to check the box(es) on the right side of the screen for each level you want to view in the mini-LJ chart. Notice the color-coded symbols on the chart representing any data point which has a rule violation from the table below. Yellow circle = Warning. Red triangle = Rejected, as compared to your rules and settings.
7. Click anywhere in the chart to see the larger, Advanced version of the same chart, where you will be able to configure your view and download a PDF of the chart for that Analyte.
8. Click the check boxes to choose the levels in use to be displayed on the chart. Each level appears in a separate chart, or set the Overlay toggle to on in order to see all of the selected levels on the same chart by Z-score.

9. Use the slider at the top of the chart to choose the number of days of data you would like to view. The default view is the previous 30 days including the current date.
    - Choose from 1–90 days. Click on the timeline or use the blue slider to adjust the number of days.
    - Advance in time by clicking the right arrow (>)or go back in time by clicking the left arrow (<) located at each end of the blue slider. The timeline advances or goes back in time by the number of days selected in the blue slider.
10. Use the drop-down menus across the bottom of the chart to select settings for other variables.
    - X-axis: Date or Sequence
    - Y-axis: Evaluation mean, Cumulative mean or Z-score
    - Comparison: None, Peer mean, Method mean or Lab cumulative mean
    - Date range: 30, 60, 90 days or Cumulative

### Download PDF and Other Features for Advanced Levey-Jennings Charts

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access

#### Download a PDF:

1. Click on the download symbol on the top right to save out a PDF of the current chart in view.

#### View Analyte details

1. Arrow down (v) from the analyte name at the top left of the chart to view the following:
    - Lot number and expiration date
    - Method
    - Reagent name and REF number
    - Calibrator name and REF number
    - Unit of measure

#### Hover to view details of any data point

1. Hover the mouse over any data point on the chart to see the following about that point:
    - Date and time the QC was run
    - Level
    - Mean and SD
    - CV
    - Z-score
    - Reason for rule violation, if applicable

Set Event Flags to visualize the point at which a change event occurs

1. Click on the gear icon at the top right of the chart. Check the box for each type of event you would like to see indicated (flagged) on the chart. Choose any, or all, of the following:
   - Reagent Lot
   - Calibrator Lot
   - Mean
   - SD
2. Watch for a flag icon when reviewing data. A flag icon appears at the day of the change(s) for the event type(s) selected. Each flag is labeled for the event indicated.

## Reports

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access

### Generate Peer Reports

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Click **Reports** at the top.
4. In the **Month and Year** field, click the calendar icon and select the month you want to view in the reports.
5. Click **Create.**
6. You have the option to enter text into the **Corrective Actions** field, then check the box called **Check this box to sign your name,** and click **Save.**

### View Saved Peer Reports

1. From the left navigation, select a Department.
2. Select an Instrument.
3. Click **Reports** at the top of the screen.
4. Click the number in parentheses to the far right of the month you wish to view.
5. Click the link showing the date and time of the saved report.
   - A PDF of the report will download for you to open.

# Connectivity

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access, except configuration is view only

*Important: Your configuration within Unity Next is unique and has been customized for your needs. Please speak with your Bio-Rad representative if you need assistance.*

### Upload Data File and Map Codes

1. Set up any new items/lots that will receive data (Instrument, Control Lot, Test (Analyte)).
2. If you are not already in the Connectivity screen, click on the orange circle with white arrow icon at the top right.
3. Choose the appropriate Configurations name for your data file from the drop-down menu.
4. Drag & drop your file or click browse and select your data file.
5. Click **Upload.**
6. Click **Map File** or the **Mapping** tab.
   - If your data file contains new Instrument(s), new Product(s) or Analyte(s), you will need to map each of those codes.
   - To unlink, hover over a linked item and click **Unlink**.
7. Check the left navigation panel to see the number of unmapped codes for new **Instrument(s)**, new **Product(s)** (Control(s)) or new **Test(s)** (Analyte(s))**.** (0 Unmapped Codes) means no mapping is required.)
8. If any codes are unmapped, click **Instruments**, **Products** (Controls) or **Tests** (Analytes) in the left navigation panel to select a code to map.
   - If you have more than one Instrument or Product lot (Control lot), click the Product (Control) or Test (Analyte) on the left again to reveal other Instruments or Product lots (Control lots) which are available for mapping.
9. Click to select the blue icon at the top of the Connectivity window which shows the code you want to map.
10. Click to select the Instrument, Product (Control) or Test (Analyte) at the bottom of the screen to map it to the selected code. For control products, select your levels in use.
11. Click **Link.**
12. Click the **Status** tab to check the status of your upload(s).
    - **Total:** The total number of processed data records.
    - **Imported:** The number of successfully imported data records.
    - **Pending:** The number of data records needing to be mapped before they can be imported.
    - **Excluded:** The number of data records not imported because they were out-of-sequence or previously imported.
    - **Errored:** The number of records that were not imported into Unity Next because of an error.

### Unmap a Code

1. Hover over the linked item (showing a link symbol) within the card for an Instrument, Product (Control) or Test (Analyte).
2. Click **Unlink** to unmap the code.

   *Note: Unmap each level individually.*

### Disable Codes

*If there are codes in your data file that you do not want to import into Unity Next, you can mark those codes as disabled. For example, if you have Lot A and Lot 1 in the data file, but you want to import only Lot 1; then you can mark Lot A as disabled on the Mapping tab.*

1. Click on the **Instrument, Product** (Control) or **Test** (Analyte) in the left navigation panel which has a code you want to disable.
2. Click the blue icon at the top of the screen with the code you want to disable.
3. Click **Disable.**

### Restore a Disabled Code

1. Click on the **Instrument, Product** or **Test** in the left navigation panel which shows a code you want to restore.
2. Click the blue icon on the right side of the Connectivity window in the Disabled codes column which has the code you want to restore.
3. Click **Restore.**

## QC Lot Viewer

**Lab Supervisor:** Full access • **Lead Technologist:** Full access • **Technologist:** Full access

1. Click on the **QC lot viewer** card.
2. A new window will open and display the following:
   - Catalog#
   - Product
   - Total Product shipped
   - Average boxes of Product per month
   - Current Lot#
   - Lot expires
   - Lot expiring in (months)
   - Remaining standing order (total)
   - Scheduled shipments (Qty – Date – Order#)
3. In order to customize your view, click on the table and then use the **Filters** on the right.
4. To export your data to an .xlsx or .csv file, hover the mouse over the ellipsis (**…**) that appears to the right of the last column in the table. This will reveal **More options.** Click on the ellipsis (**…**) and choose **Export data** from the drop down menu.

# Technical Support

## Support Hours

Support of Bio-Rad controls and software products does not end when you receive your products.

Three support groups are available to help you with any questions or concerns.

**Monday** through **Friday**
**5:00AM to 4:00PM** (Pacific Time)
**Phone: (800) 854-6737**
**Fax: (949) 598-1531** (in the US)

## Contact

**Software Support**
1-800-854-6737 option #3
Unity_Support@Bio-Rad.com

**QC Program**
1-800-854-6737 option #4
UnityReports@Bio-Rad.com
EQAS_Support@Bio-Rad.com

**Technical Services**
1-800-854-6737 option #2
QSD.TechService@Bio-Rad.com