Unity Next Release Notes

January 2023

New user roles and User Management

- ï The following roles are available for Unity Next users:
  - o <u>Account User Manager</u>: This role will be to manage user provisioning at the account (for multi-locations setup) and location level.
  - o <u>Lab User Manager</u>: This role will be to manage user provisioning at the laboratory location level.
  - o <u>Supervisor</u>: This role is the highest level of control and has access to all modules and functionality.
  - o <u>Lead Technician</u>: This is a hybrid role between a Technician and a Supervisor role. This role will be able to manage settings and lab setup options (without delete) in addition to data entry and reports.
  - o <u>Technician</u>: This role has basic access with the ability to enter data and run reports.
- ï New look for the user management screen in a list view with the ability to search and sort users.

September 2022

Multi-Locations

- ï Ability to setup and support accounts with multiple locations for both Lot Viewer and Unity Next.
- ï Lab locations can now have one admin user for multiple locations under the same account.

Lab Default settings

- ï Lab location's settings are now available under the gear icon. The following lab default settings can now be changed/updated as needed:
  - o Data entry: Point or Summary
  - o Track reagent and calibrator lot: Yes or No
  - o Decimal places value: 0-4

October 2021

Copy Instruments

- ï Ability to copy instruments with Controls and Analytes (Analyte settings) within and/or across departments.

Multi-data entry page refresh

- Multi-data entry pages enhanced and refreshed for better visibility of multiple analytes and data points.

- Previous data points are listed next to data entry fields in a grey box.

- Additional lab setup links for 'Add a department', 'Add an instrument', 'Add a control' and 'Add an analyte' added to left navigation.

Expired Lots card

- Product lot(s) expired and/or expiring within 45 days will be listed on the Exprired Lots card on the Dashboard.

- User will have the ability to Start a new lot for the lot(s) expiring within and across instruments by clicking on the Product name on the card.

September 2021

Connectivity

- Ability to upload more than one file at a time.

June 2021

Archiving

- Ability to archive a Department, Instrument, Control and/or Analyte.
- All archived items will be listed in a disabled (greyed-out) state on the bottom of the screen at every level once the "Archived items" toggle is on.

Custom Sort

- Ability to custom Sort Panels, Departments, Instruments, Controls and Analytes.

- Data table and reports will follow the sorting of the respective items.

- Reset to A-Z sorting is also available.

Duplicate Lots (across Instruments)

- Ability to start a new lot across instruments under different department(s) with same Product and Lot #.

March 2021

Panels

- Ability to create a Panel and enter data points for both single and multi-data entry.

December 2020

QC Lot Viewer

- ï Purchase order number added to each scheduled shipment.

Connectivity

- ï Implemented the ability to disable unwanted codes that enables management of what results are needed for processing QC vs. extraneous results that need to be filtered out.
- ï Implemented the ability to delete unwanted codes.
- ï Enhanced the Status section of connectivity with a 'Disabled' count of results, per uploaded file, to allow full accountability of the results either processed or managed by disabling codes.

November 2020

Duplicate Lots

- ï Ability to add a new lot and copy the analytes with settings from an existing lot of the same product under the same instrument.

QC Lot Viewer

- ï Implemented the ability to view all (Ship-To) locations associated to your laboratory.

October 2020

QC Lot Viewer

- ï New account identification Sold-to and Ship-to drop-down menus.

Connectivity

- ï Implemented a more robust file history status for data files uploaded through connectivity. This enables users to review the total QC record count and any potential rejected data.
- ● Ability to specify a start and end date for filtering uploaded data. This enables the users to filter non-essential data while uploading data files.
- ● Additional enhancements and fixes associated with the release.

August 2020

Westgard Rules

- All statistical process control rules now made available with a more structured approach with regards to applicability
- (New) Ability for the user to define a more precise control measurement for the 1-x rules (i.e. 1-2.55 or 1-4.55, etc.)

Evaluation Mean/SD

- Ability for the user to define the number of points before rule evaluation when using floating statistics.
- Ability for the user to set fixed vs. float statistics for rule evaluation.
- Ability for the user to use the cumulative float statistics (based upon initial or last restart), the last 30, 60 or 90 days to set a fixed evaluation value.
- Additional enhancements and fixes associated with the release.

July 2020

QC Lot Viewer

- **Visibility to standing order information by Customer Ship-To Account#**
  - Access to Unity Next Portal
  - Select QC Lot Viewer Card
  - Access to their (Ship-to) product lot information
  - The data table will include the following information; Product Catalog #, Product Name/Size, Lot #, Lot expiration (in months), Average boxes per month, Remaining standing order (total), Scheduled Shipments (qty-date)
  - Ability to sort and filter data for each of the above attributes
  - More options available, including ability to export data to print
  - Updated weekly and date noted in footnotes

May 2020

Connectivity

- The ability for a user to upload QC data based upon some predefined set of instructions
- Track file upload status and map any unlinked mnemonics or codes using a common .csv or delimited data format file type for the means of automating QC results.
- (If applicable) The ability to map reagent and/or calibrator lot codes for statistical grouping of results within Unity Next is also a new feature.

March 2020

Unity Next Essentials

- **Setup your lab location**
  - Configure your departments, instruments, products, and tests for your Bio-Rad QC products
  - Delete configurations when no test result data present
  - Request new instrument and test configuration additions to drop-down menu
- **Input and manage your data**
  - Insert test results before last run
  - Delete test results
  - Ability to import and track reagent and calibrator lot changes
- **View your data**
  - View Levey-Jennings chart and summary statistics
  - Review recorded summary of **Actions** input, **Comments** input, and **History** of data input
- **Run your reports**
  - Generate reports at instrument level for selected timeframe
    - o Monthly Evaluation Report
    - o Laboratory Comparison Report
  - Record sign off with corrective action inputs for each QC product
- **Select your parameters and settings**
  - Select to apply SPC Rules:
    - o 1-2s
    - o 1-3s
  - Select levels in use
  - Select point or summary data entry
- **Manage your user accounts**

- Add, Edit, and Delete accounts
- Available roles:
  - Administrator
  - User