UnityConnect

Reference Guide

October 2017
Version 2.0

BIO-RAD

Contents

CHAPTER 1

Overview of UnityConnect

In This Chapter

Introduction

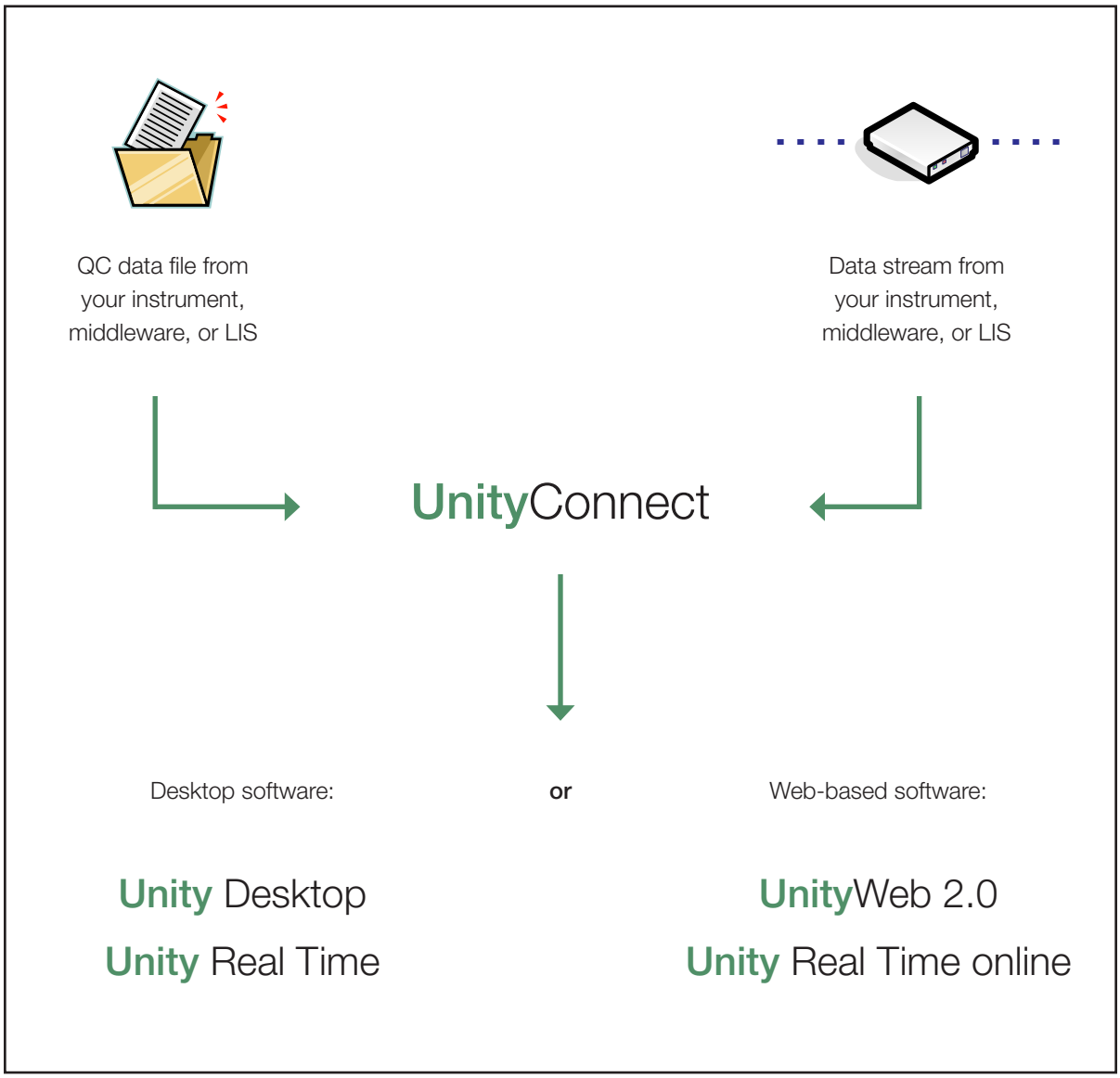
UnityConnect is Bio-Rad's newest and most complete connectivity solution that allows "any laboratory" to get connected to the right Unity QC data management solution.

UnityConnect consists of Bio-Rad software and optional hardware to interface QC data from instruments, middleware, and Laboratory Information Systems (LIS) directly into your Unity QC data management software.

Note: Unity QC data management software includes desktop software (Unity Desktop and Unity Real Time) and Web-based software (UnityWeb 2.0 and Unity Real Time online).

UnityConnect provides effective QC data processing and automates the import of QC data, thereby eliminating manual data entry and errors.

Illustration of UnityConnect



About This Guide

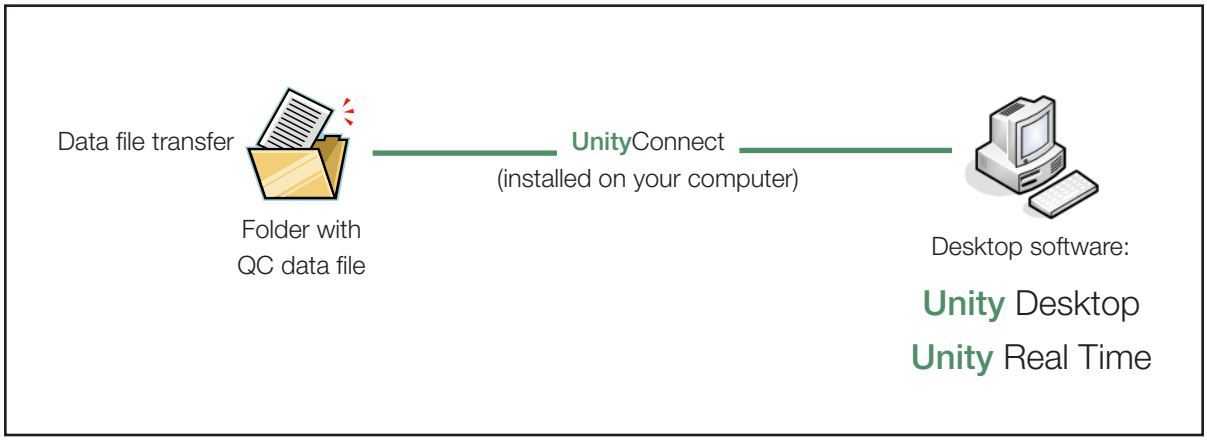
This guide contains information and instructions for all UnityConnect configurations. However, you only need to refer to chapters specific to the configuration used in your laboratory.

How Will You Use UnityConnect in Your Laboratory?

See the following sections for references to your specific configuration:

- Data file transfer with desktop software (page 3)
- Data file transfer with Web-based software (page 4)
- Data stream with desktop software (page 5)
- Data stream with Web-based software (page 5)

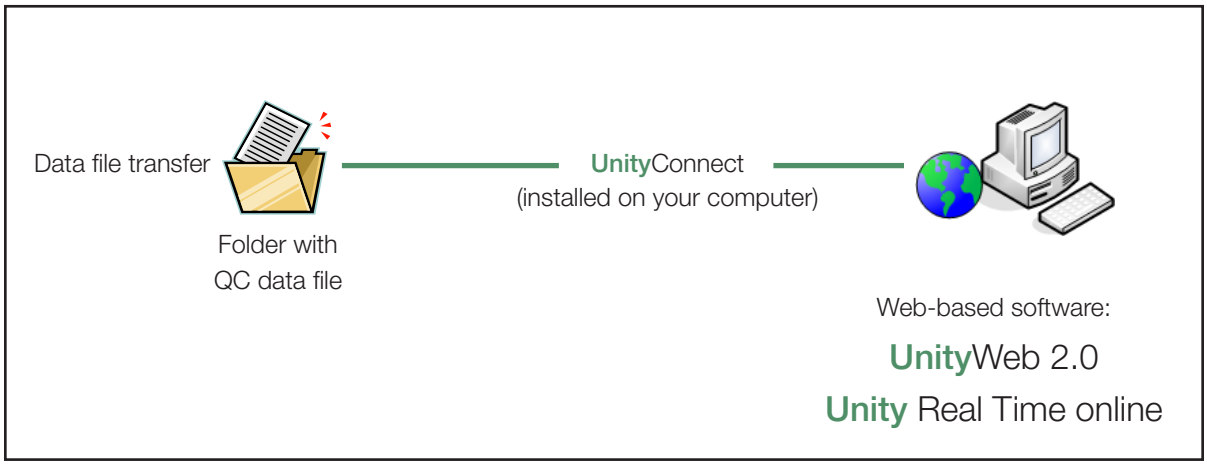
Data File Transfer with Desktop Software



See the following chapters for more information about this configuration:

- Chapter 1, “Overview of UnityConnect” (this chapter)
- Chapter 2, “Working with QC Data Files”
- Chapter 3, “Configuring UnityConnect for Data File Transfer with Desktop Software”
- Chapter 8, “Transforming Data for Desktop Software”
- Chapter 10, “New Configuration in UnityConnect”
- Chapter 11, “VITROS Slide Generation Numbers and UnityConnect” (if you use slide generation numbers)
- Chapter 12, “Viewing the Rejection Log for Desktop Software”
- Chapter 14, “Viewing Watch Folder Logs”
- Chapter 15, “Backup and Restore”

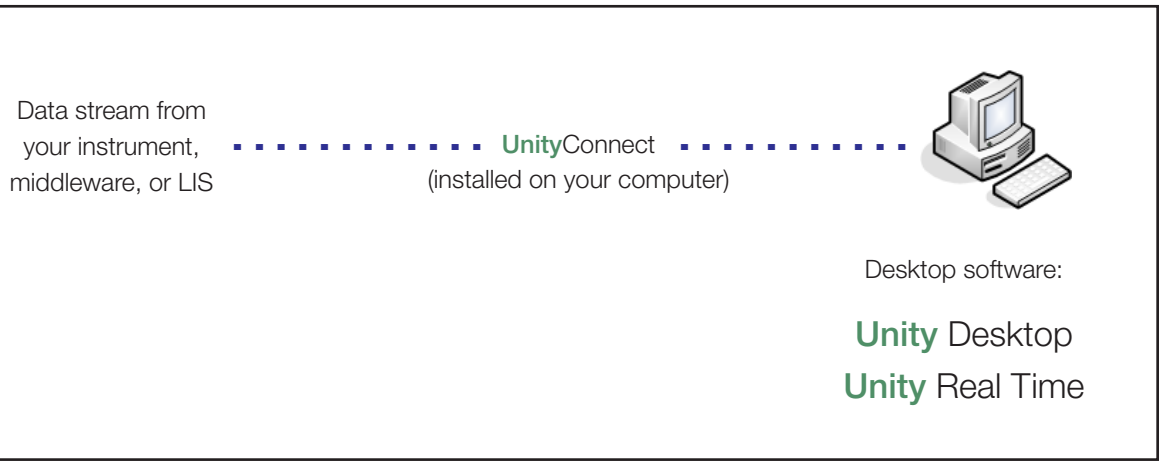
Data File Transfer with Web-based Software



See the following chapters for more information about this configuration:

- Chapter 1, “Overview of UnityConnect” (this chapter)
- Chapter 2, “Working with QC Data Files”
- Chapter 4, “Configuring UnityConnect for Data File Transfer with Web-based Software”
- Chapter 9, “Transforming Data for Web-based Software”
- Chapter 10, “New Configuration in UnityConnect”
- Chapter 11, “VITROS Slide Generation Numbers and UnityConnect” (if you use slide generation numbers)
- Chapter 13, “Viewing the Rejection Log for Web-based Software”
- Chapter 14, “Viewing Watch Folder Logs”
- Chapter 15, “Backup and Restore”

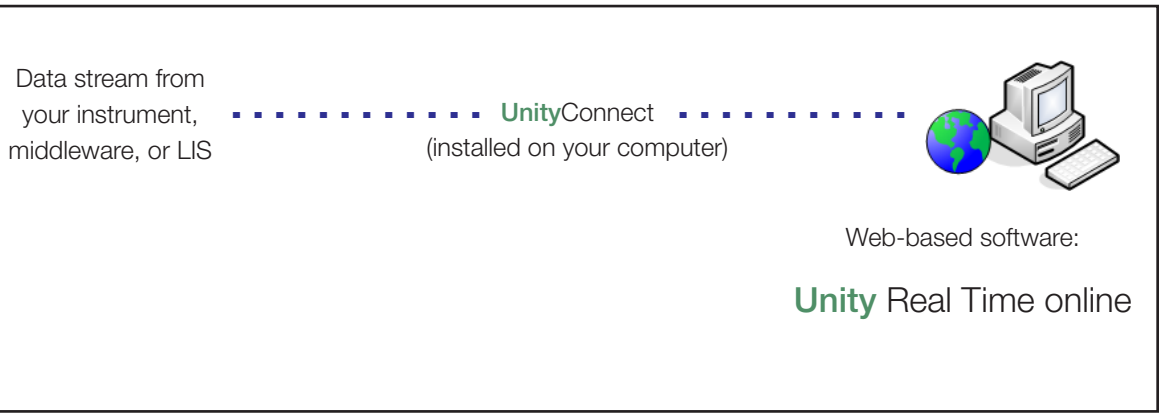
Data Stream with Desktop Software



See the following chapters for more information about this configuration:

- Chapter 1, “Overview of UnityConnect” (this chapter)
- Chapter 5, “Configuring UnityConnect for a Data Stream with Desktop Software”
- Chapter 7, “Data Acquisition Manager”
- Chapter 10, “New Configuration in UnityConnect”
- Chapter 11, “VITROS Slide Generation Numbers and UnityConnect” (if you use slide generation numbers)
- Chapter 12, “Viewing the Rejection Log for Desktop Software”
- Chapter 14, “Viewing Watch Folder Logs”
- Chapter 15, “Backup and Restore”

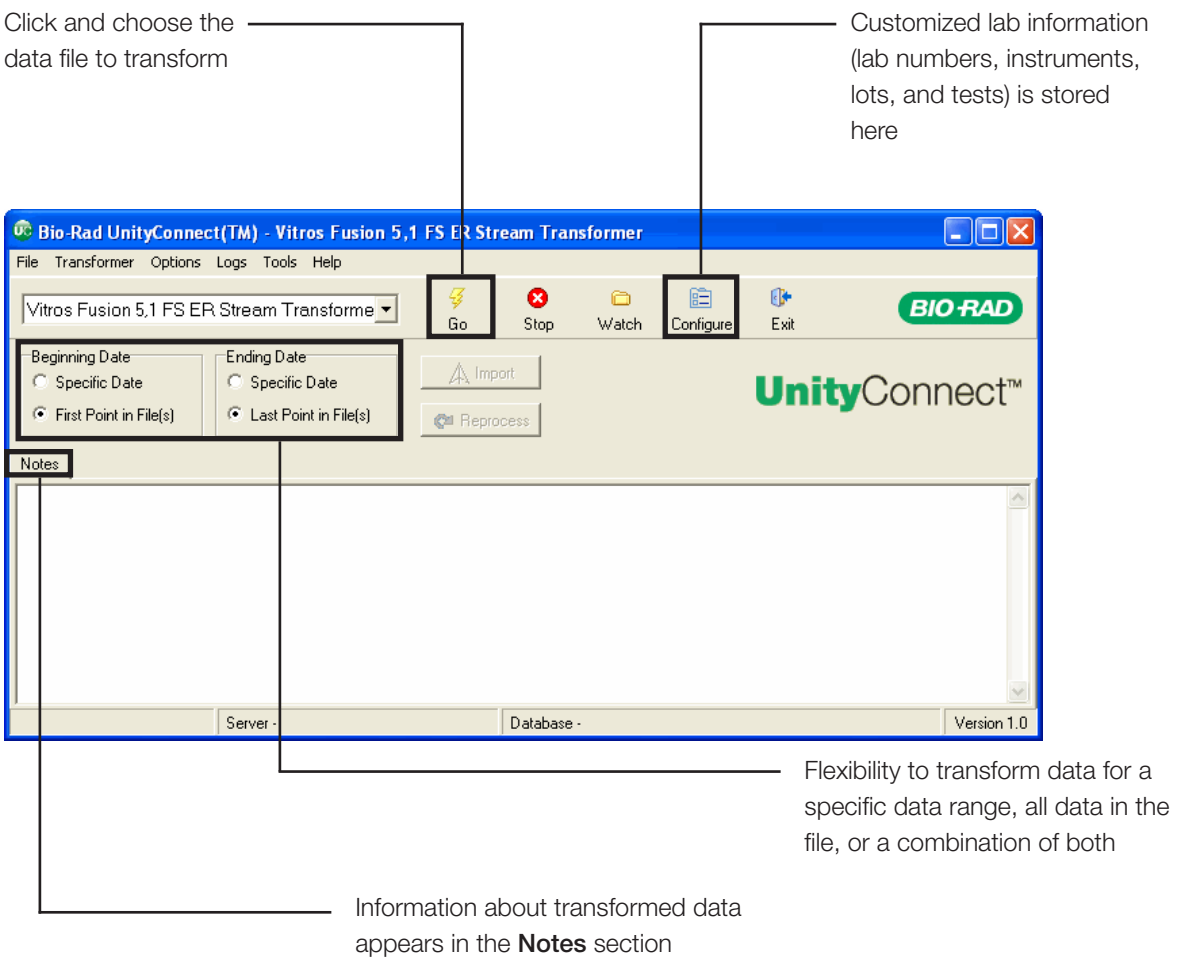
Data Stream with Web-based Software

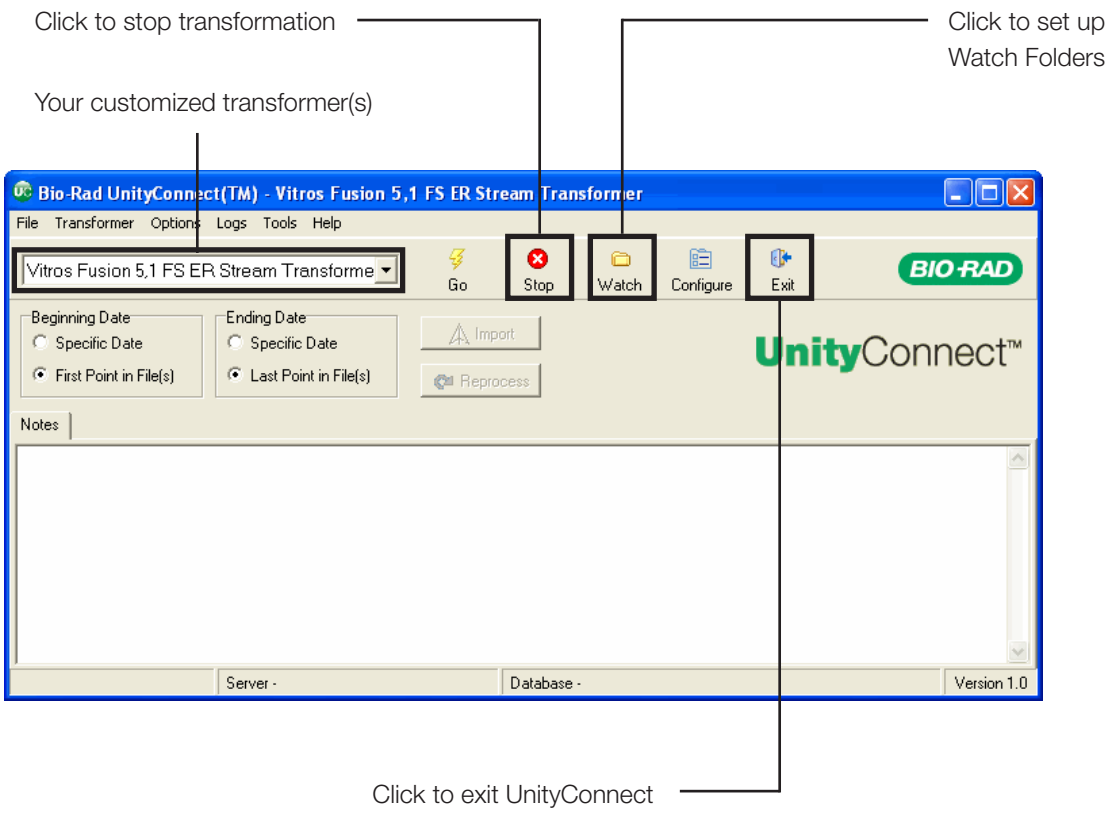


See the following chapters for more information about this configuration:

- Chapter 1, “Overview of UnityConnect” (this chapter)
- Chapter 6, “Configuring UnityConnect for a Data Stream with Web-based Software”
- Chapter 7, “Data Acquisition Manager”
- Chapter 10, “New Configuration in UnityConnect”
- Chapter 11, “VITROS Slide Generation Numbers and UnityConnect” (if you use slide generation numbers)
- Chapter 12, “Viewing the Rejection Log for Desktop Software”
- Chapter 14, “Viewing Watch Folder Logs”
- Chapter 15, “Backup and Restore”

Organization of UnityConnect





How UnityConnect Works

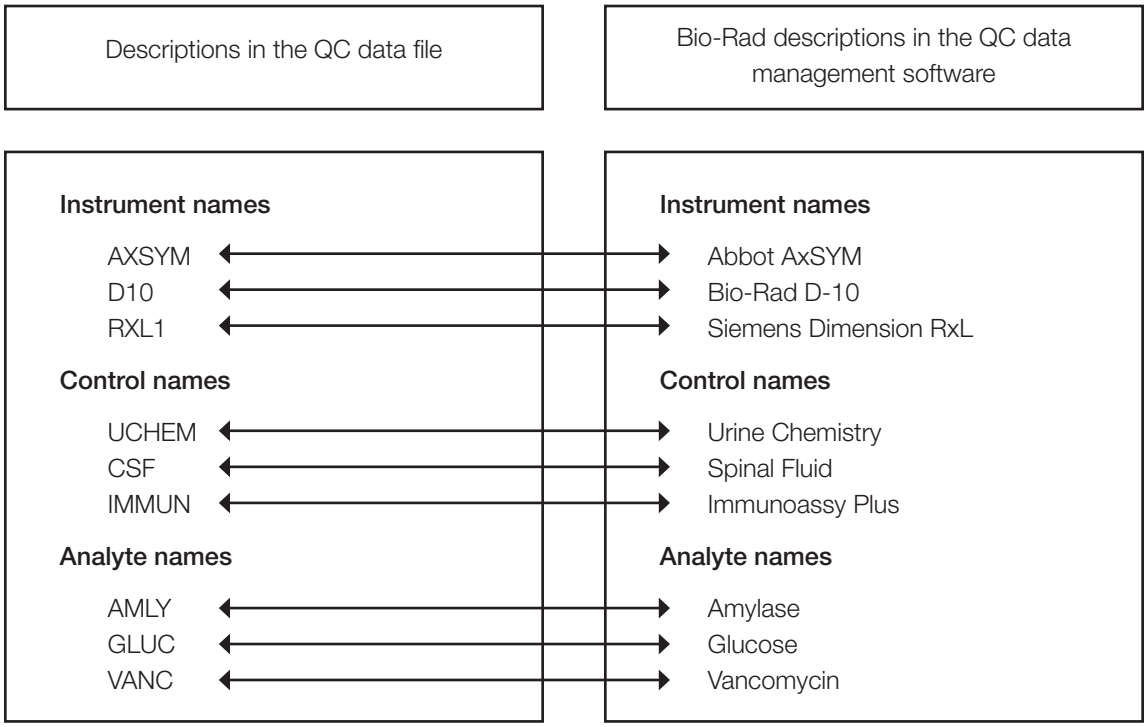
Laboratories around the world use unique names to identify information in their instruments, middleware, and LIS. For example, a laboratory may refer to the Siemens Diagnostics ADVIA Centaur as “Centaur 1.” Everyone in the laboratory recognizes the instrument as Centaur 1 so the LIS is programmed with this information.

However, in order to compare QC data with other laboratories running tests on a Siemens Diagnostics ADVIA Centaur, standard identifiers are needed.

UnityConnect provides the ability to match the descriptions used for QC items (instruments, lots, test) in the LIS to the Bio-Rad description in your Unity software.

Example of Matching Information

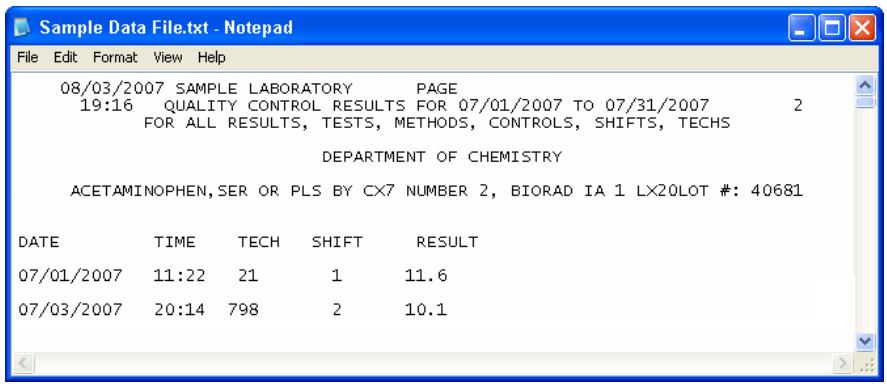
Note: The descriptions in the following illustration are examples only. The descriptions in your QC data file will be different.



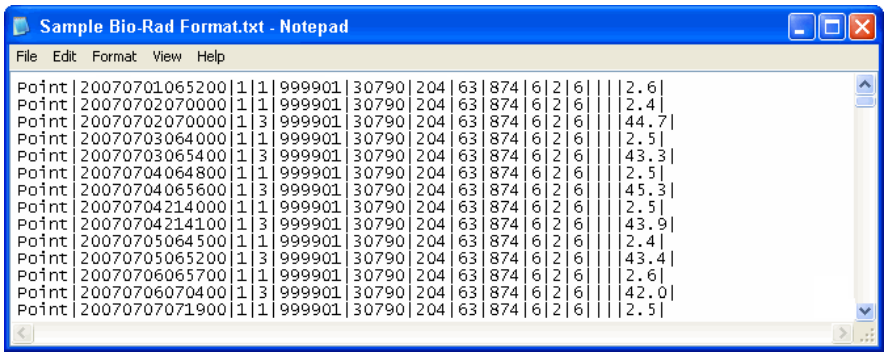
Why UnityConnect?

The sole purpose of UnityConnect is to transform your QC data from the format of your instrument, middleware, or LIS into the Bio-Rad format. UnityConnect reads the unique information in the QC data file and transforms it so it can be added to the Unity peer group in a standardized manner.

Example of QC data file from LIS



Example of Bio-Rad format



Data is automatically imported into your QC data management software after transformation

QC data management software

Working with the Customized Transformer

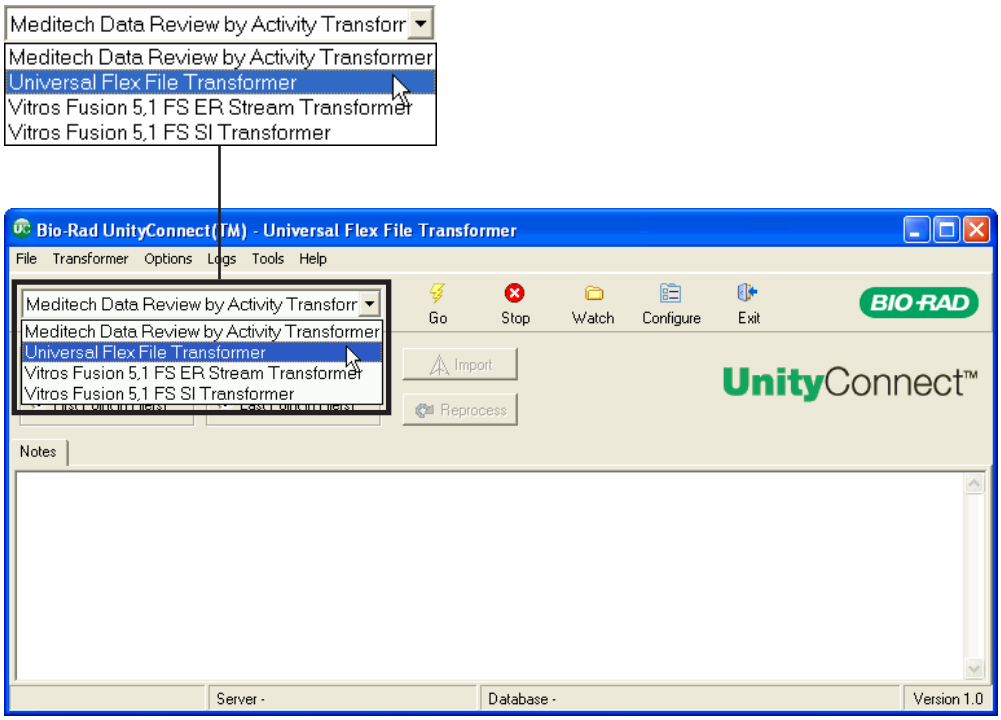
UnityConnect is a Bio-Rad connectivity solution consisting of one or more customized transformers created especially for your instrument, middleware, or LIS. UnityConnect provides the following capabilities for the transformer:

- Copy a transformer (page 10)
- Editing a transformer (page 11)
- Deleting a transformer (page 15)
- Configuring a transformer (page 16)
- Migrate settings from a previous version (page 17)

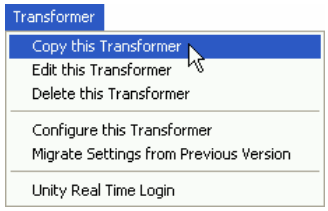
Copying a Transformer

Copying a transformer is helpful when you are using an instrument transformer and have multiple instruments of the same type.

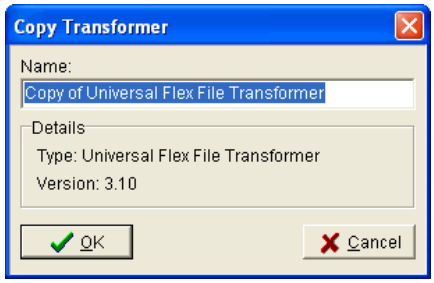
1 Select the transformer you want to copy from the list of transformers.



2 Click the **Transformer** menu and then click **Copy this Transformer**.



The **Copy Transformer** dialog box appears.



3 Click OK .

Tip: You can rename the copy of the transformer for easy identification. See "Renaming a Transformer" on page 11 for more information.

Editing a Transformer

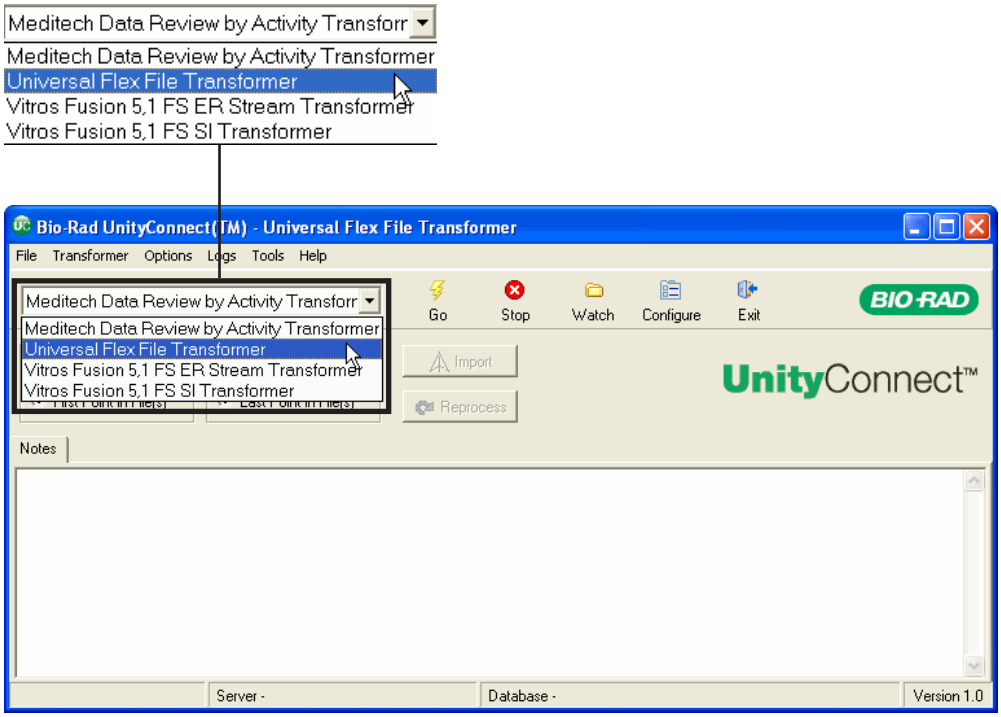
You can edit a transformer by:

- Renaming a transformer (page 11)
- Editing the input file type (page 13)

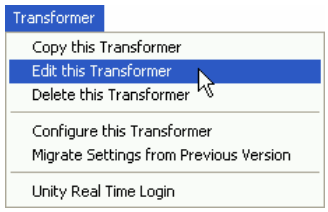
Renaming a Transformer

Renaming a transformer is useful if you have more than one transformer and want the display name for the transformer the same as the instrument, middleware, or LIS name used in your laboratory.

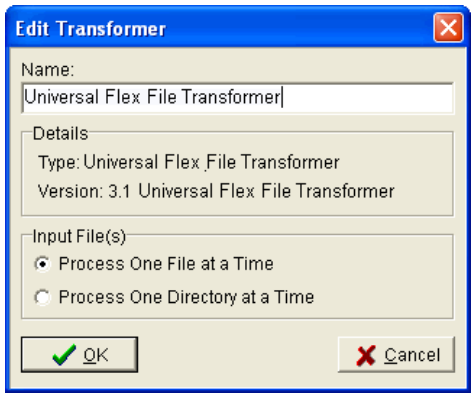
1 Select the transformer you want to edit from the list of transformers.



2 Click the **Transformer** menu and then click **Edit this Transformer**.



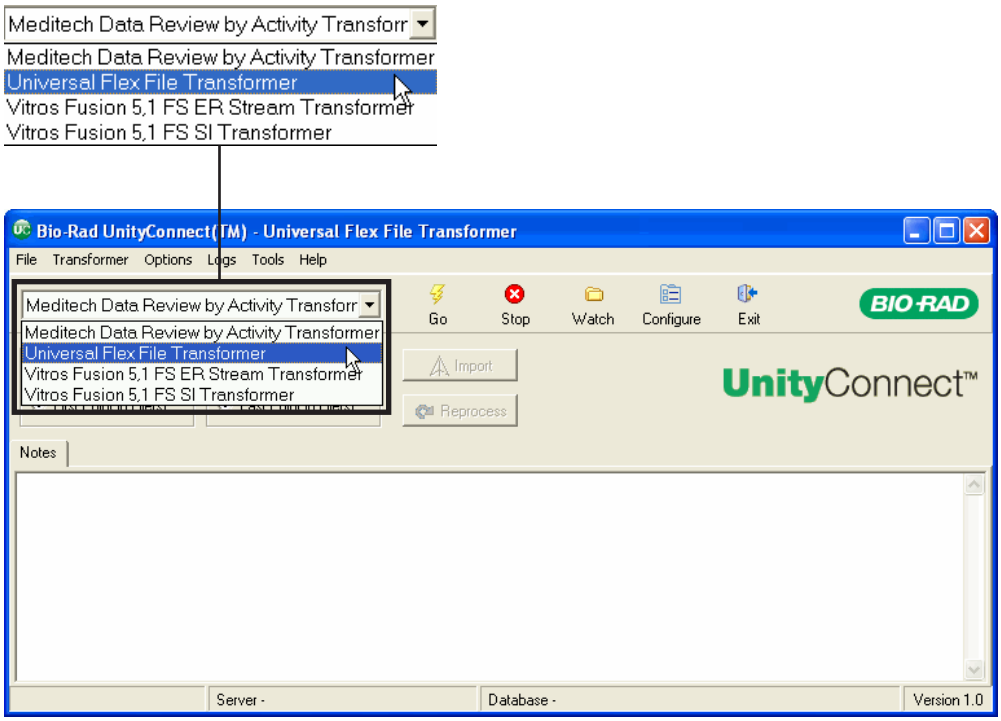
3 Click in the **Name** field and type the new name for the transformer.



4 Click OK .

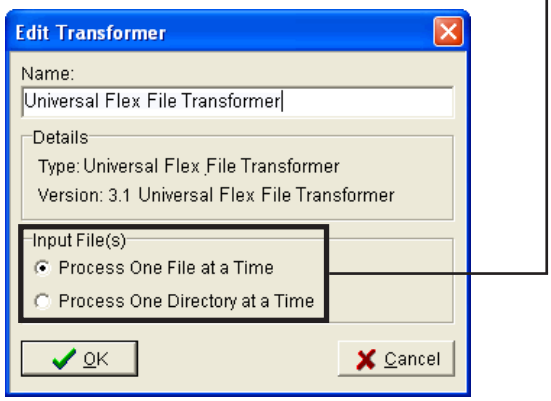
Editing the Input File Type

1 Select the transformer you want to edit from the list of transformers.



2 Click the **Transformer** menu and then click **Edit this Transformer**.

3 Select an option for the input file.



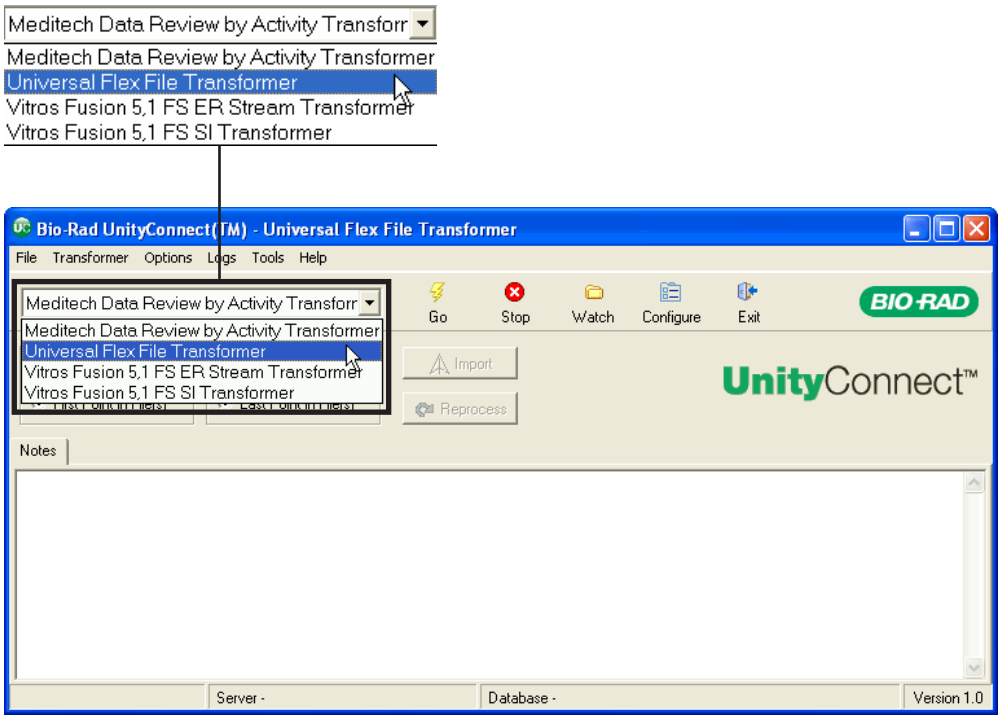
Note: Some Laboratory Information Systems (LIS) output multiple files when creating QC data files. One example is the Orchard LIS. Processing a directory is useful in this instance.

4 Click OK .

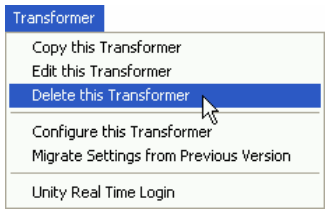
Deleting a Transformer

Important: Deleting a transformer permanently removes the transformer from the UnityConnect software. You must contact Bio-Rad to use the transformer in the future. Do not delete a transformer unless requested to do so by Bio-Rad.

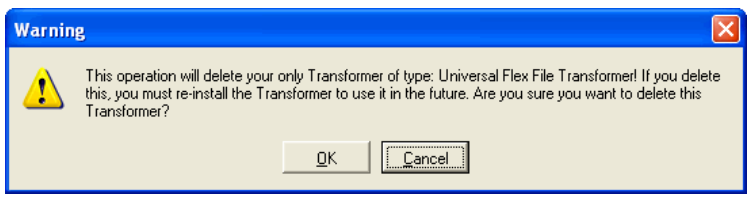
1 Select the transformer you want to delete from the list of transformers.



2 Click the **Transformer** menu and then click **Delete this Transformer**.



A message appears asking for confirmation.

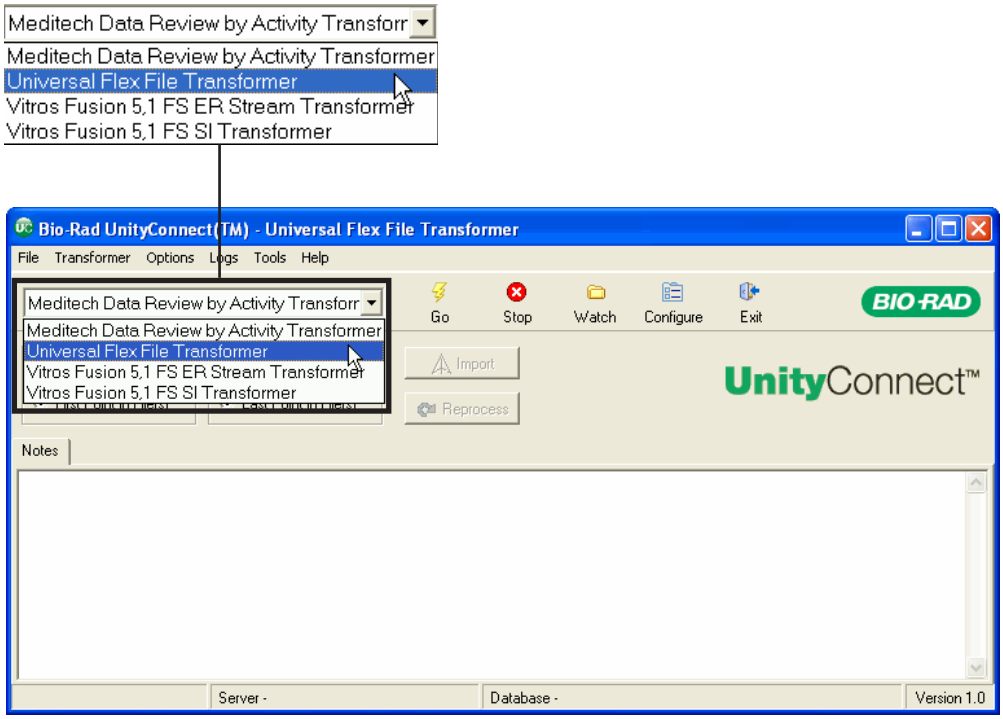


3 Click OK .

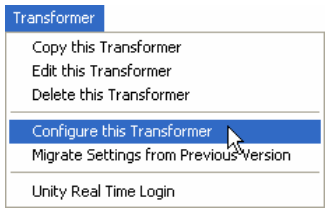
Configuring a Transformer

Important: Only users with a valid database login can change the configuration for a transformer. See Chapter 10, “New Configuration in UnityConnect” for more information.

1 Select the transformer you want to configure from the list of transformers.



2 Click the **Transformer** menu and then click **Configure this Transformer**.



3 Log in to your QC data management software database if prompted.

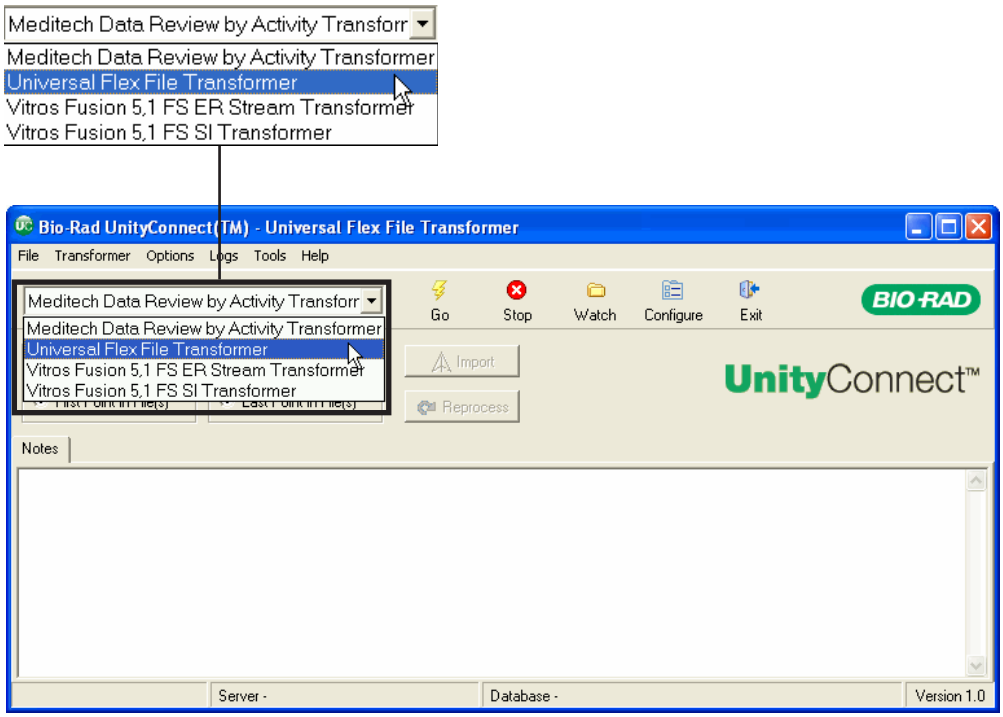
The **Data File Options** tab appears.

Note: See “UnityConnect Tabs” on page 21 for more information about configuration.

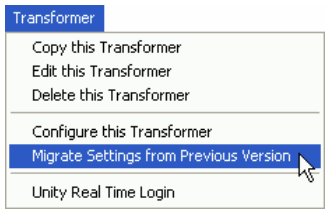
Migrating Settings from a Previous Version

The migrate settings feature provides the ability to upgrade to newer versions of transformers when available.

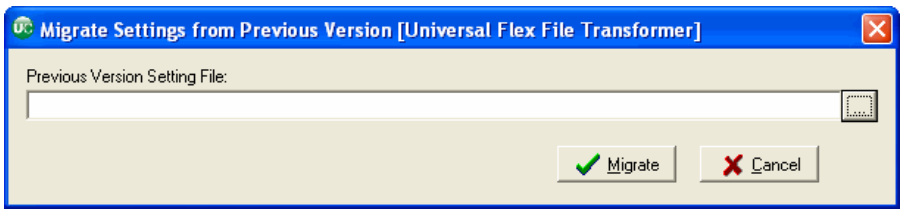
1 Select the transformer you want to migrate from the list of transformers.



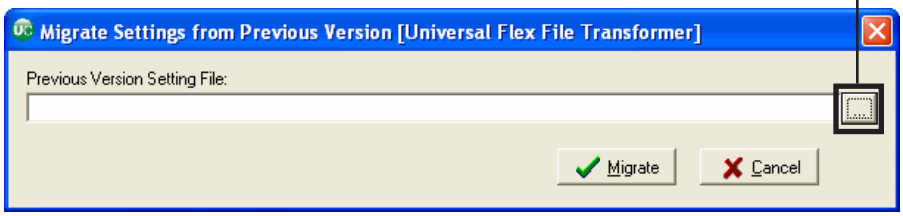
2 Click the **Transformer** menu and then click **Migrate Settings from Previous Transformer**.



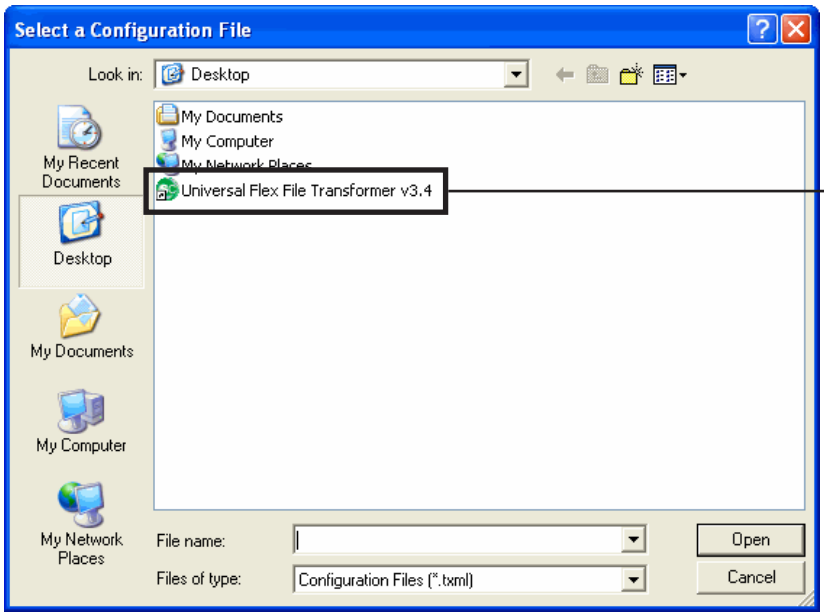
The **Migrate Settings from Previous Version** dialog box appears.



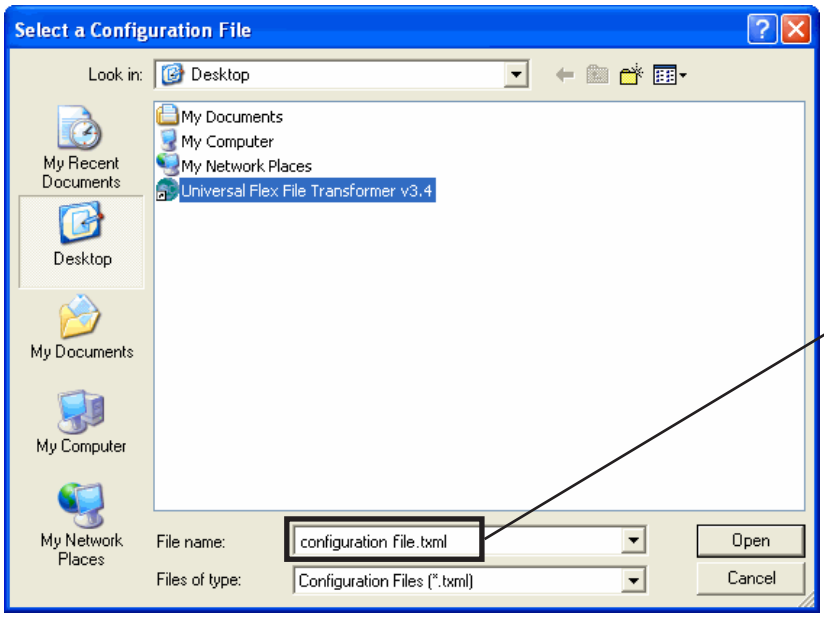
3 Click (ellipsis button).



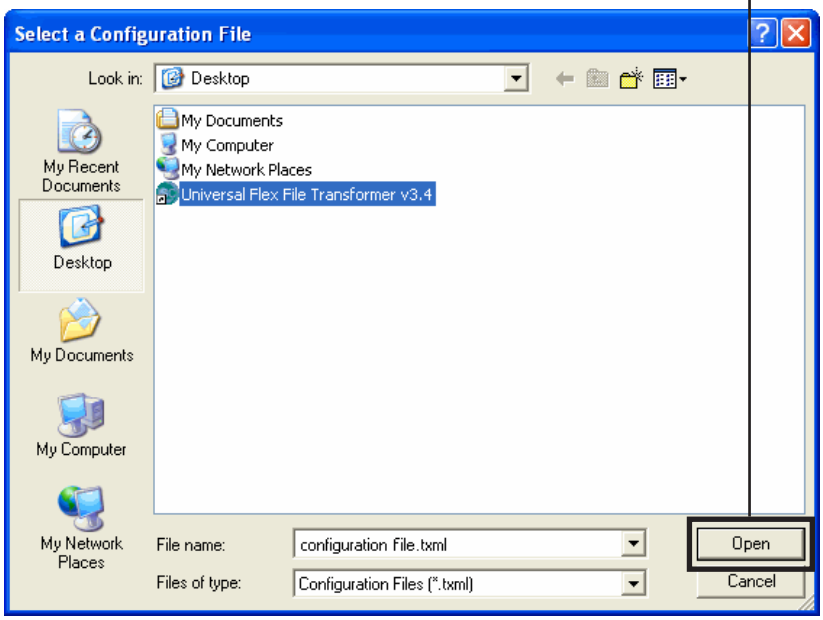
4 Select the configuration file.



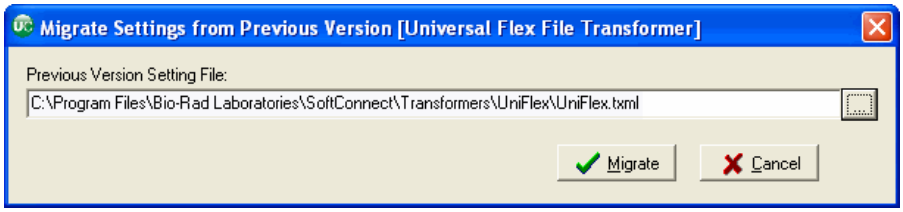
The configuration file name appears here after selecting it.



5 Click Open .

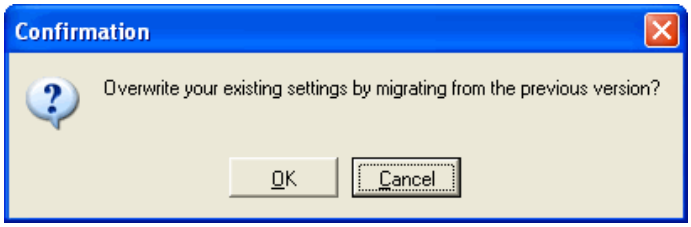


6 The **Migrate Settings** dialog box shows the selected file and path.



7 Click Migrate .

8 A message appears asking for confirmation.



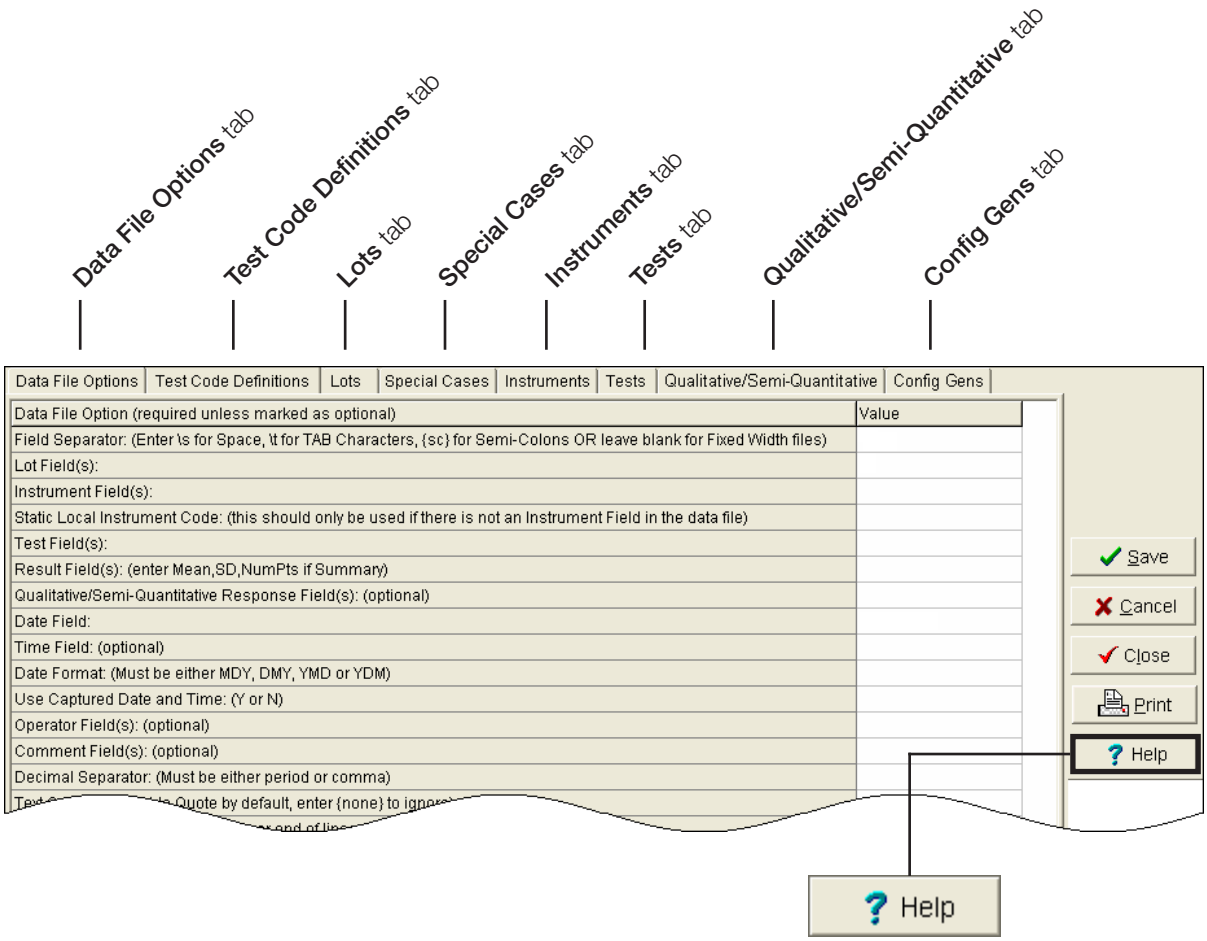
9 Click OK .

UnityConnect Tabs

Bio-Rad created your customized UnityConnect software based on all the information in the original QC data file provided by your laboratory. After the initial configuration is complete, new configuration is required only if a new QC item (such as an instrument, lot, or test) is added to your QC data file.

UnityConnect processes the QC data file and, if necessary, displays messages prompting you to match or configure the new information in the QC data file with the information in your QC data management software. UnityConnect automatically determines the information needing configuration and presents the appropriate tab where the configuration can be completed.

Important: UnityConnect is a customized product. Therefore, your UnityConnect software may not present all of the tabs shown in this section. Click Help located in the lower right corner of the window to view customized online help for your transformer.



The following sections provide more information about the different tabs in UnityConnect:

- **Data File Options** tab (page 22)
- **Test Code Definitions** tab (page 30)

- **Lots** tab (page 31)
- **Special Cases** tab (page 38)
- **Instruments** tab (page 38)
- **Tests** tab (page 46)
- **Qualitative/Semi-Quantitative** tab (page 52)
- **Config Gens** tab (page 52)

Note: New configuration is discussed in more detail in Chapter 10, “New Configuration in UnityConnect”.

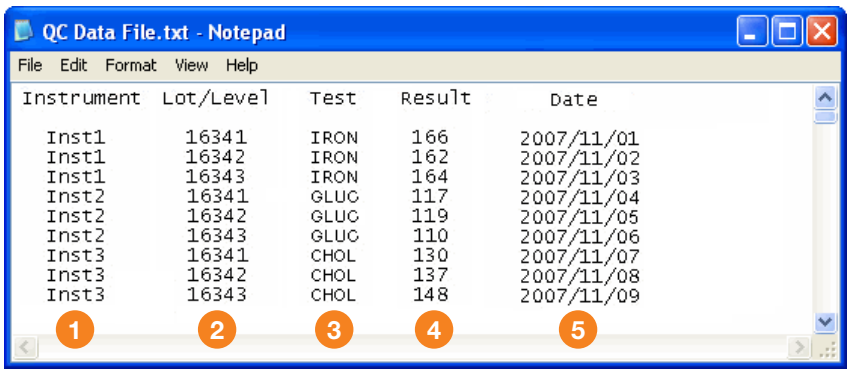
Data File Options Tab

The **Data File Options** tab is the most important tab in UnityConnect. The settings on this tab tell UnityConnect where to find important information in your QC data file critical for successful data transformation.

Bio-Rad created your customized UnityConnect software based on the QC data file your laboratory provided. Your laboratory’s QC data file provided the “blueprint” for Bio-Rad to determine the unique data identifiers used in your laboratory and their specific location within the QC data file. Your unique settings drove the UnityConnect software design process and the options and settings available on the **Data File Options** tab.

Data file formats vary from system to system. However, the essential components are the same as shown in the example below.

Example Data File



1. Unique designation for each instrument

   Each instrument has a unique designation in the example: Inst1, Inst2, and Inst3.

2. Unique designation for the control and level

   Each control and level has a unique designation in the example: 16341 (lot 16340-level 1), 16342 (lot 16340-level 2), and 16343 (lot 16340-level 3).

3 Unique test designation

Each test has a unique designation in the example: IRON, GLUC, and CHOL.

4 Test result

Each result has a valid numeric value in the example.

> **Note**: UnityConnect cannot transform data with a value of 0 (zero) or a negative numeric value.

5 Date of each test result

Each result has an associated date. In the example above the format is year/month/day.

The settings on the **Data File Options** tab reflect your unique format. Once configured, these settings remain unchanged as long as the QC data files used to transform QC data are created in the identical manner as the QC data file used to create your UnityConnect software.

In addition, adding new instruments, lots, or tests does not disrupt the functionality of your UnityConnect software as long as you set up the new QC item (such as an instrument, lot, or test) with a unique identifier and in the same format and location in the QC data file as existing QC items.

The **Data File Options** tab can be organized into one of two general types within UnityConnect:

- Traditional configuration (this page)
- Universal Flex File configuration (page 28)

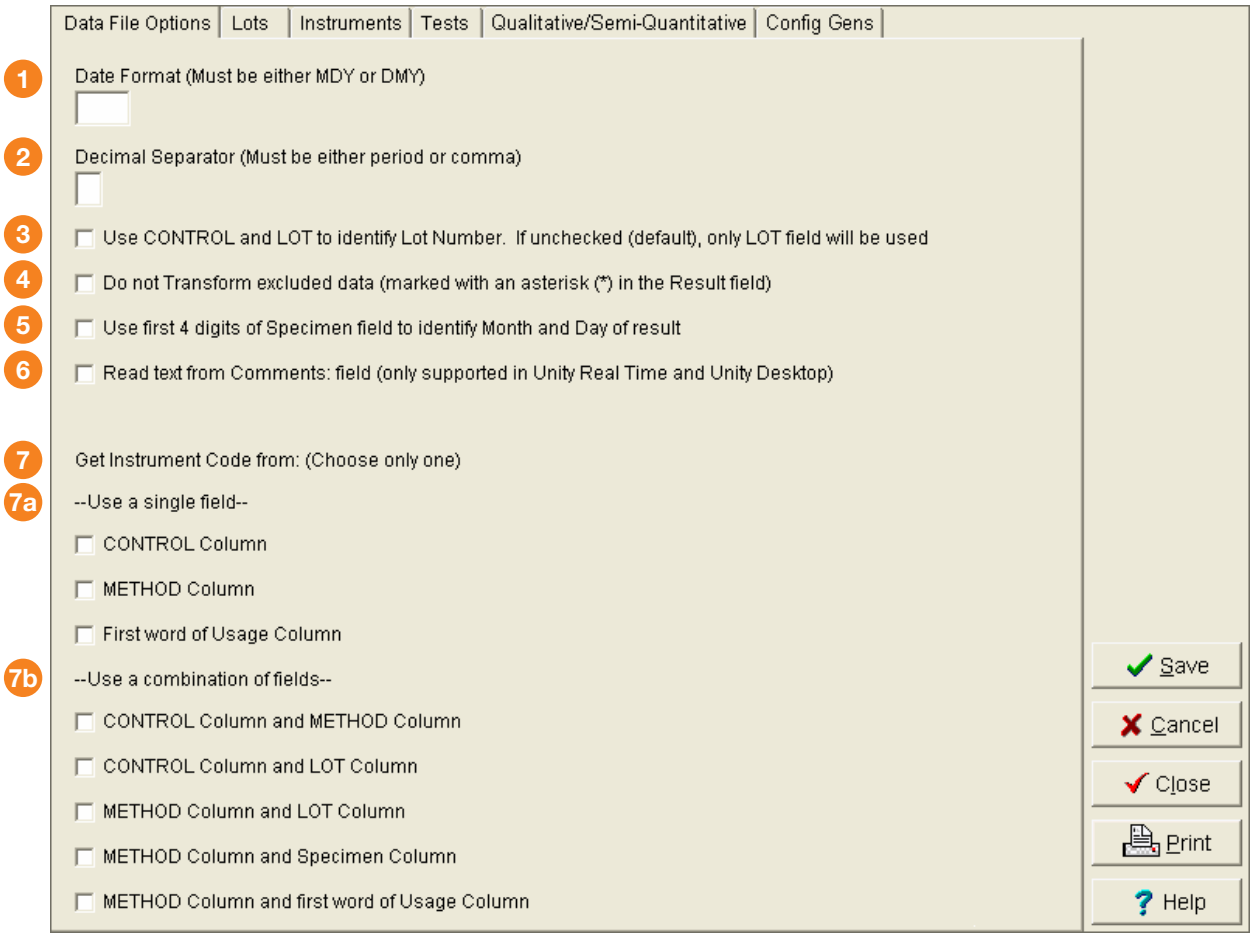
> **Important**: UnityConnect is a customized product. Therefore, the example information shown in this section may not be identical to your UnityConnect. Click ? Help located in the lower right corner of the window to view customized online help for your transformer.

Traditional Configuration

Traditional configuration uses fields and check boxes to configure the **Data File Options** tab.

Example Data File Options Tab—Traditional Configuration

Example Data File Options Tab—Traditional Configuration (continued)



1 Date Format

This field identifies how the date is specified in the QC data file. Date formats can use a two digit or four digit year. Date format options are:

- **MDY** (month-day-year)
- **DMY** (day-month-year)

> **Important**: The date format must be in uppercase letters. For example, MDY or DMY.

2 Decimal Separator

The decimal separator must be designated as a period (**.**) or a comma (**,**). It is the character used as the decimal separator on the local computer.

Example: 1.25 (decimal) or 1,25 (comma).

> **Note**: The standard separator for United States customers is a period.

3 Use CONTROL and LOT to identify Lot Number. If unchecked (default), only LOT field will be used

UnityConnect reads the lot number from the Lot field if this check box is not selected. UnityConnect reads the lot number from the Control and Lot fields if this check box is selected.

4 Do not Transform excluded data (marked with an asterisk (*) in the Result field)

UnityConnect excludes outliers in the Results field that are marked with an asterisk (*) if this check box is selected.

5 Use first 4 digits of Specimen field to identify Month and Day of result

UnityConnect determines the month and day of the result using the first four digits of the Specimen field if this check box is selected.

6 Read text from Comments: field (only supported in Unity Desktop and Unity Real Time)

UnityConnect transforms and imports text from the Comments field into the Comments field of your QC data management software if this check box is selected.

> **Note**: This feature is not compatible with all software.

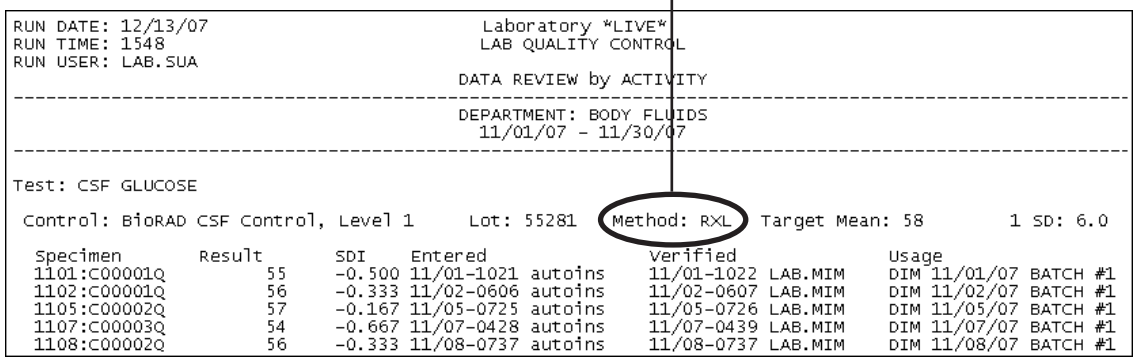
7 Get Instrument Code from (Choose only one)

These settings are used to identify which field(s) in the QC data file contain(s) the instrument designation.

> **Important**: One check box must be selected so UnityConnect knows which field(s) to read from the original QC data file.

The instrument designation is in the Method field in the example below.

(RXL = Siemens Dimension RxL)



```
RUN DATE: 12/13/07                          Laboratory *LIVE*
RUN TIME: 1548                              LAB QUALITY CONTROL
RUN USER: LAB.SUA
                                          DATA REVIEW by ACTIVITY
-------------------------------------------------------------------------------------------------------------
                                          DEPARTMENT: BODY FLUIDS
                                            11/01/07 - 11/30/07
-------------------------------------------------------------------------------------------------------------

Test: CSF GLUCOSE

 Control: BioRAD CSF Control, Level 1     Lot: 55281   Method: RXL   Target Mean: 58        1 SD: 6.0

  Specimen       Result      SDI    Entered              Verified             Usage
  1101:C00001Q         55    -0.500 11/01-1021 autoins   11/01-1022 LAB.MIM   DIM 11/01/07 BATCH #1
  1102:C00001Q         56    -0.333 11/02-0606 autoins   11/02-0607 LAB.MIM   DIM 11/02/07 BATCH #1
  1105:C00002Q         57    -0.167 11/05-0725 autoins   11/05-0726 LAB.MIM   DIM 11/05/07 BATCH #1
  1107:C00003Q         54    -0.667 11/07-0428 autoins   11/07-0439 LAB.MIM   DIM 11/07/07 BATCH #1
  1108:C00002Q         56    -0.333 11/08-0737 autoins   11/08-0737 LAB.MIM   DIM 11/08/07 BATCH #1
```

7a --Use a single field--

- **CONTROL Column**

  UnityConnect reads the instrument designation from the Control field in the QC data file if this check box is selected.

- **METHOD Column**

  UnityConnect reads the instrument designation from the Method field in the QC data file if this check box is selected.

- **First word of Usage Column**

  UnityConnect reads the instrument designation from the first word of the Usage column field in the QC data file if this check box is selected.

7b --Use a combination of fields--

- **CONTROL Column and METHOD Column**

  UnityConnect reads the instrument designation from a combination of the Control and Method fields in the QC data file if this check box is selected.

- **CONTROL Column and LOT Column**

  UnityConnect reads the instrument designation from a combination of the Control and Lot fields in the QC data file if this check box is selected.

- **METHOD Column and LOT Column**

  UnityConnect reads the instrument designation from a combination of the Method and Lot fields in the QC data file if this check box is selected.

- **METHOD Column and Specimen Column**

  UnityConnect reads the instrument designation from a combination of the Method and Specimen fields in the QC data file if this check box is selected.

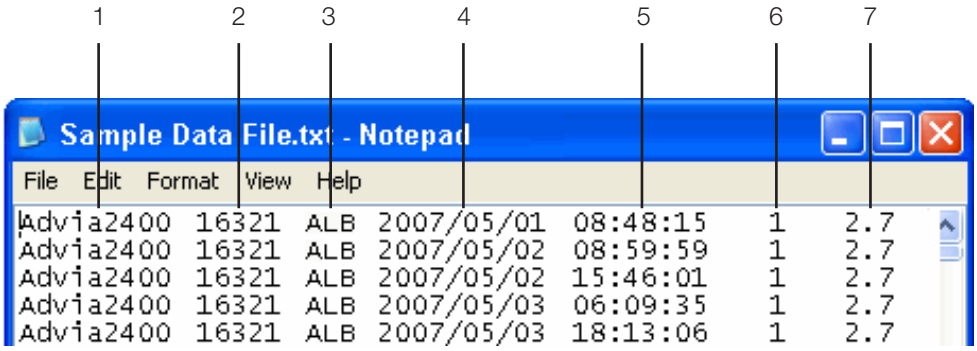
- **METHOD Column and first word of Usage Column**

  UnityConnect reads the instrument designation from a combination of the Method and the first word of the Usage fields in the QC data file if this check box is selected.

Universal Flex File Configuration

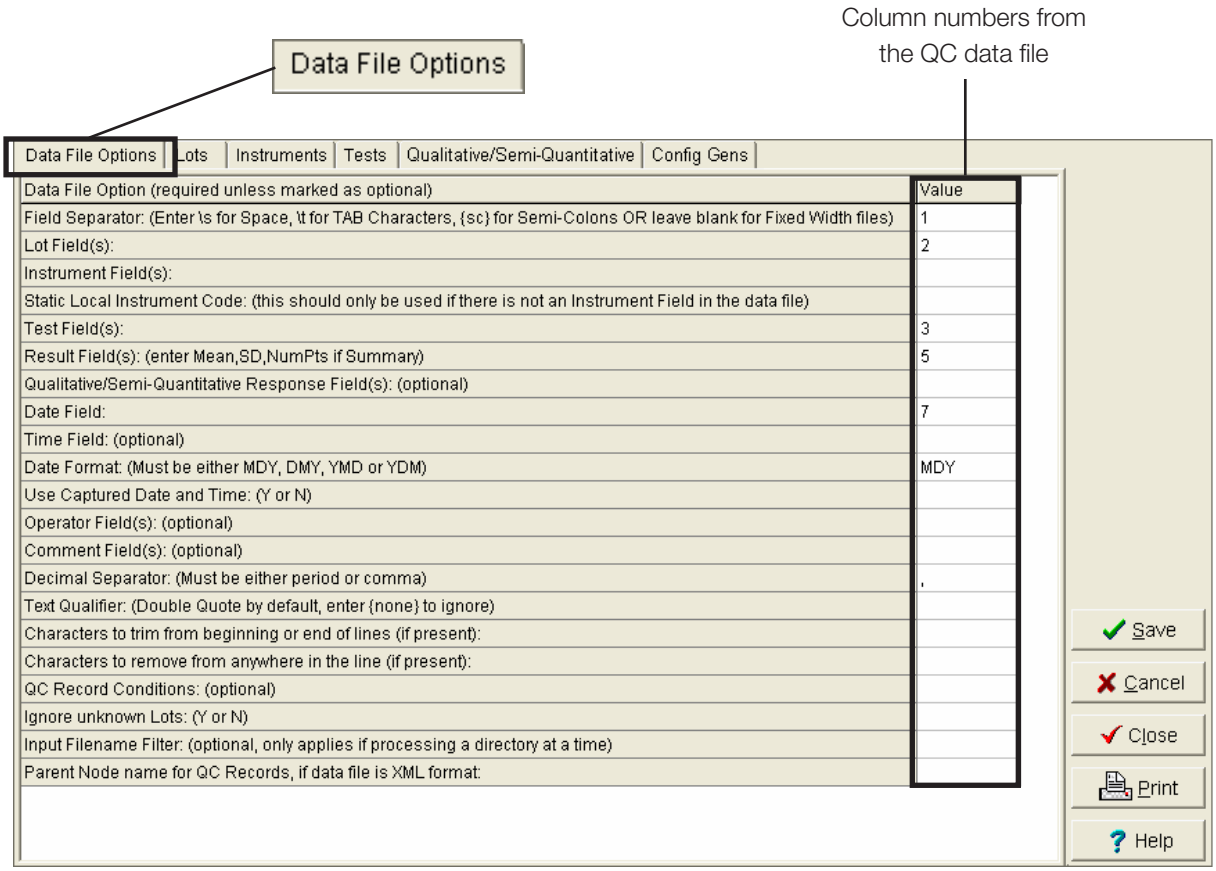
The Universal Flex File configuration uses column numbers or fixed width columns to configure the **Data File Options** tab. Although column numbers do not actually appear in the QC data file, the columns are discernible as vertically arranged information. Columns are numbered beginning with one; column one is the leftmost column in the data file.

Example of Data File Columns



The column numbers from the QC data file are used in the appropriate fields on the **Data File Options** tab to designate corresponding information between the QC data file and UnityConnect. An example is shown in the illustration below.

Example Data File Options Tab—Universal Flex File



Note: Some fields on the **Data File Options** tab are optional.

If more than one field is used as a designation in the QC data file, both column numbers are used and separated by a comma (,).

Overview of Other Configuration Tabs

After the initial configuration is complete, new configuration is required only if a new QC item (such as an instrument, lot, or test) is added to the QC data file.

UnityConnect automatically determines the information needing configuration and presents the appropriate tab where the configuration can be completed. UnityConnect guides you to the appropriate tab where you complete configuration.

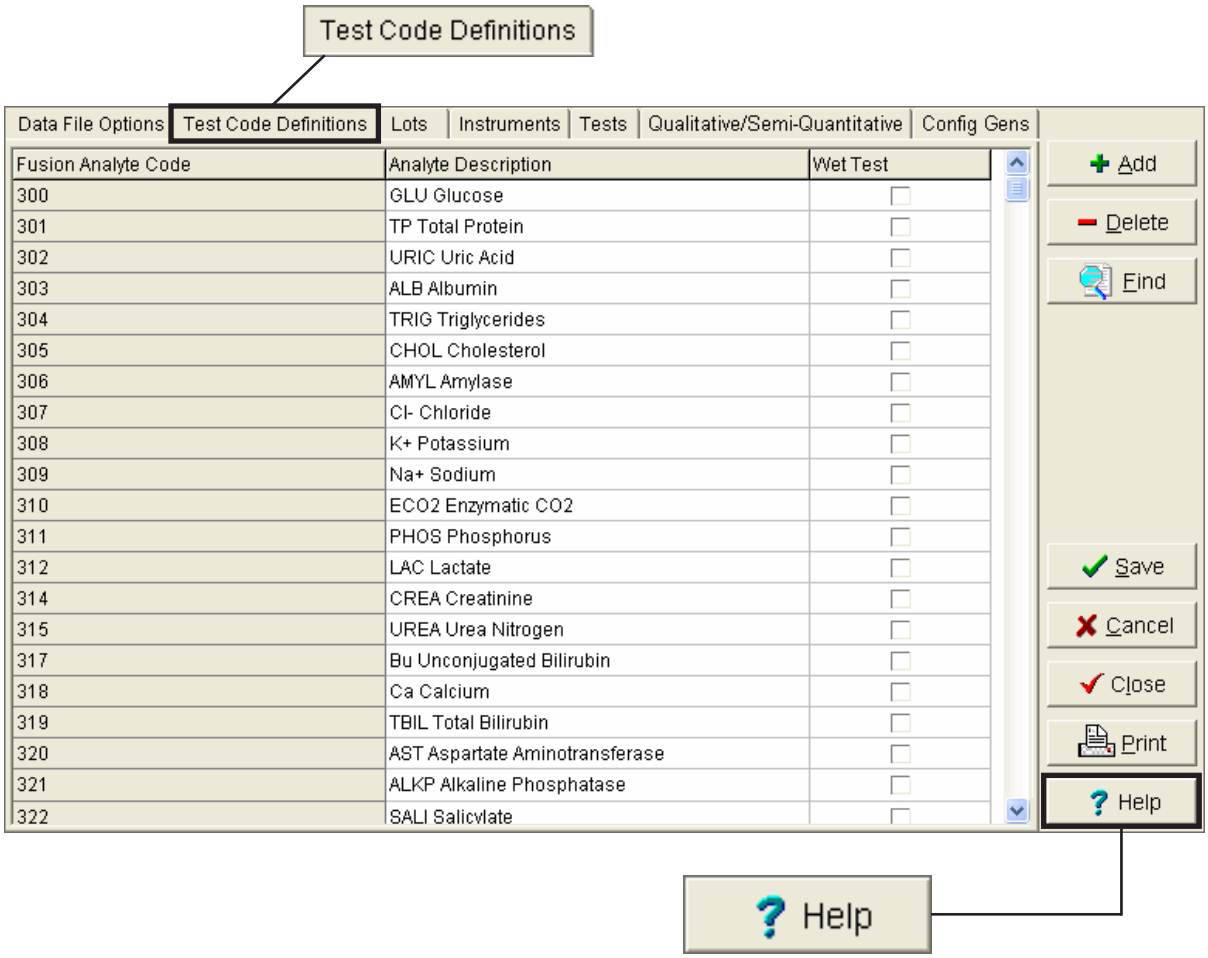
Important: UnityConnect is a customized product. Therefore, your UnityConnect software may not present all of the tabs shown in this section. Click Help located in the lower right corner of the window to view customized online help for your transformer.

Test Code Definitions Tab

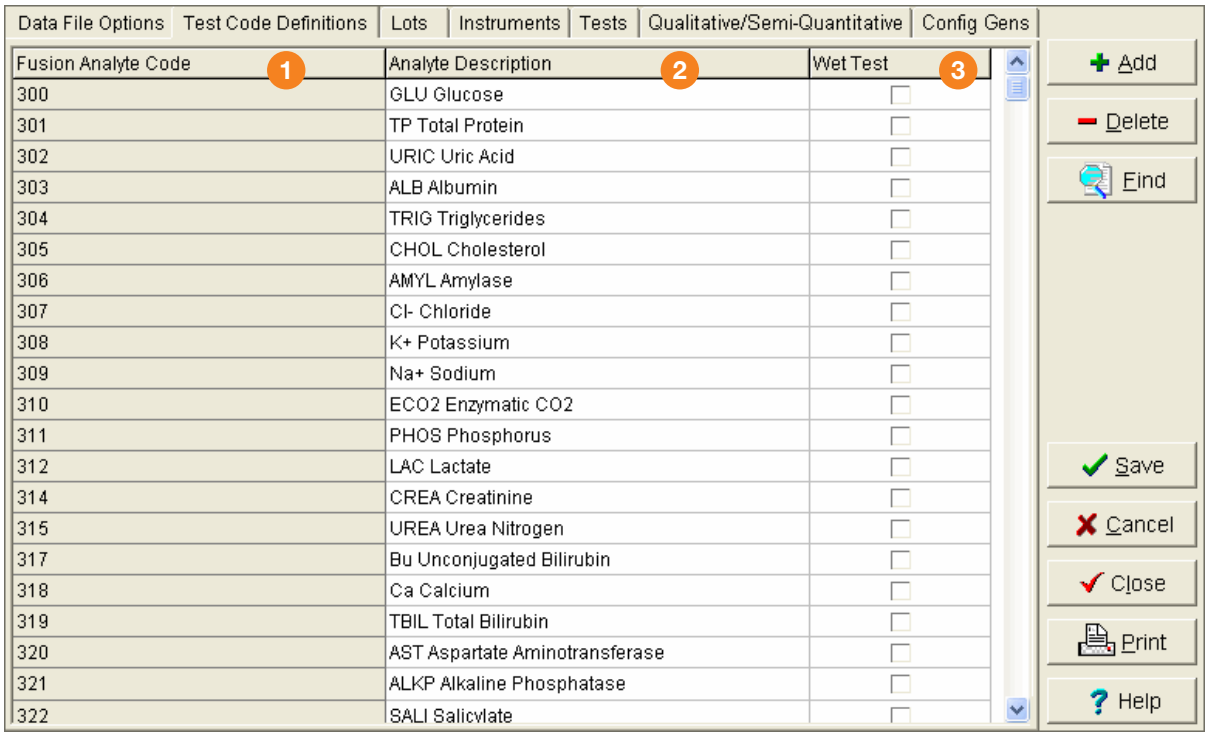
The **Test Code Definitions** tab only appears for instrument transformers that define the analyte as a number. UnityConnect converts the number of the analyte to the analyte name and shows the name on the **Test** tab. For VITROS instrument transformers, the **Test Code Definitions** tab is also used to define wet tests versus dry tests.

Important: Test configuration in UnityConnect varies according to specific information in the QC data file. Therefore, the example configuration information shown in this section may not be identical to your software. Click Help located in the lower right corner of the window to view customized online help for your transformer.

Example Test Code Definitions Tab



Example Test Code Definitions Tab (continued)



1 Analyte Code

The analyte designation in the QC data file.

2 Analyte Description

The instrument manufacturer's description of the analyte.

3 Wet Test

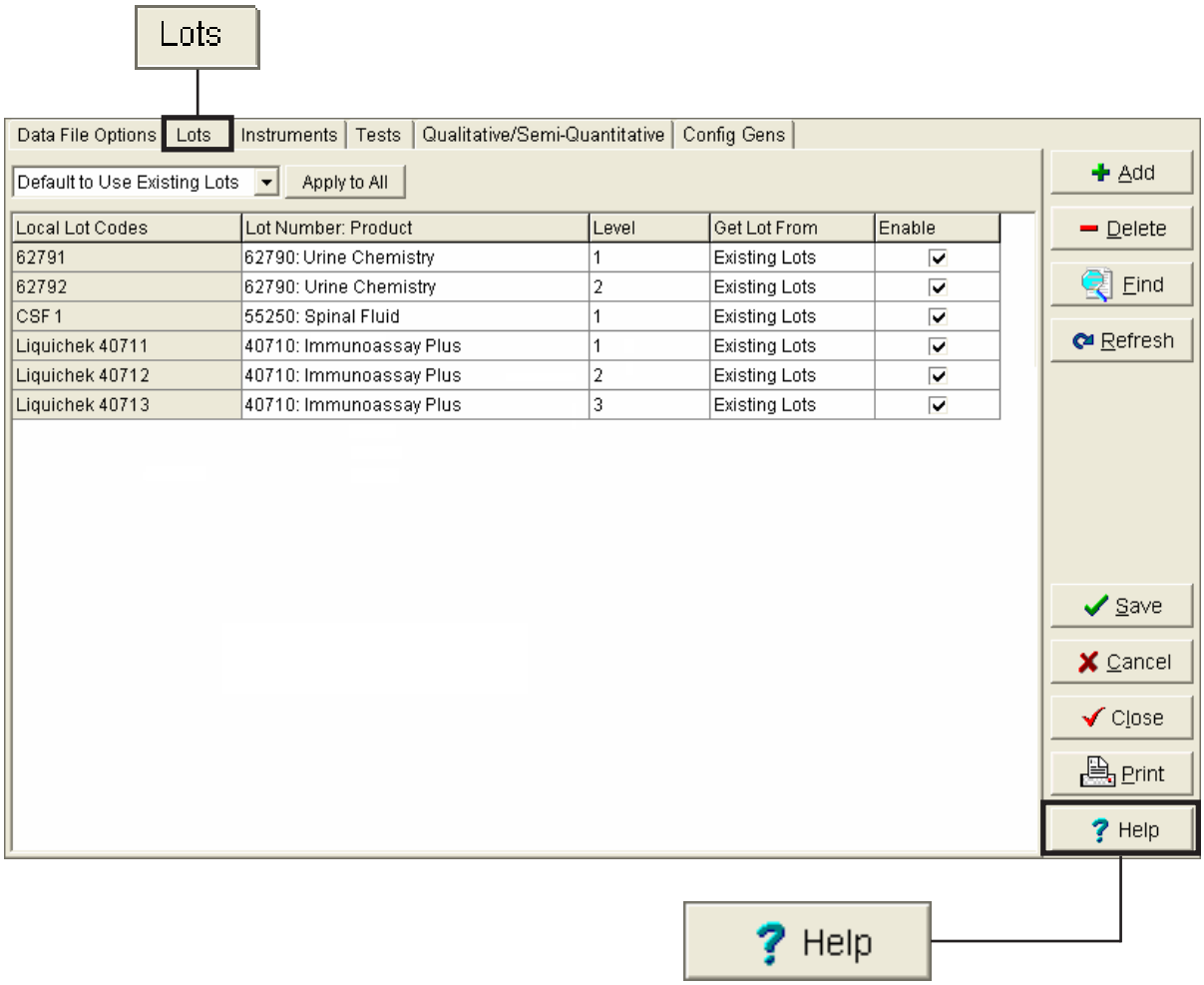
Select the check box in the **Wet Test** column to indicate a VITROS wet test.

Lots Tab

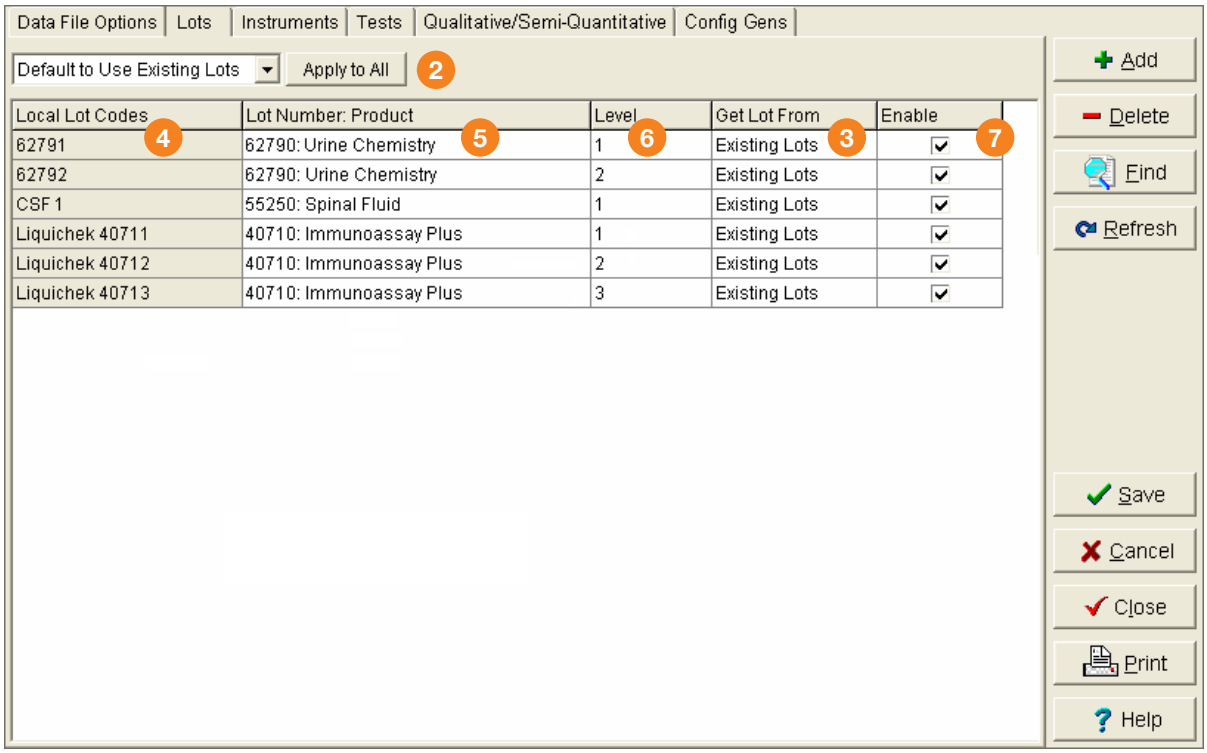
The **Lots** tab contains all of your specific lot information.

Important: Lot configuration in UnityConnect varies according to specific information in the QC data file. Therefore, the example configuration information shown in this section may not be identical to your software. Click Help located in the lower right corner of the window to view customized online help for your transformer.

Example Lots Tab

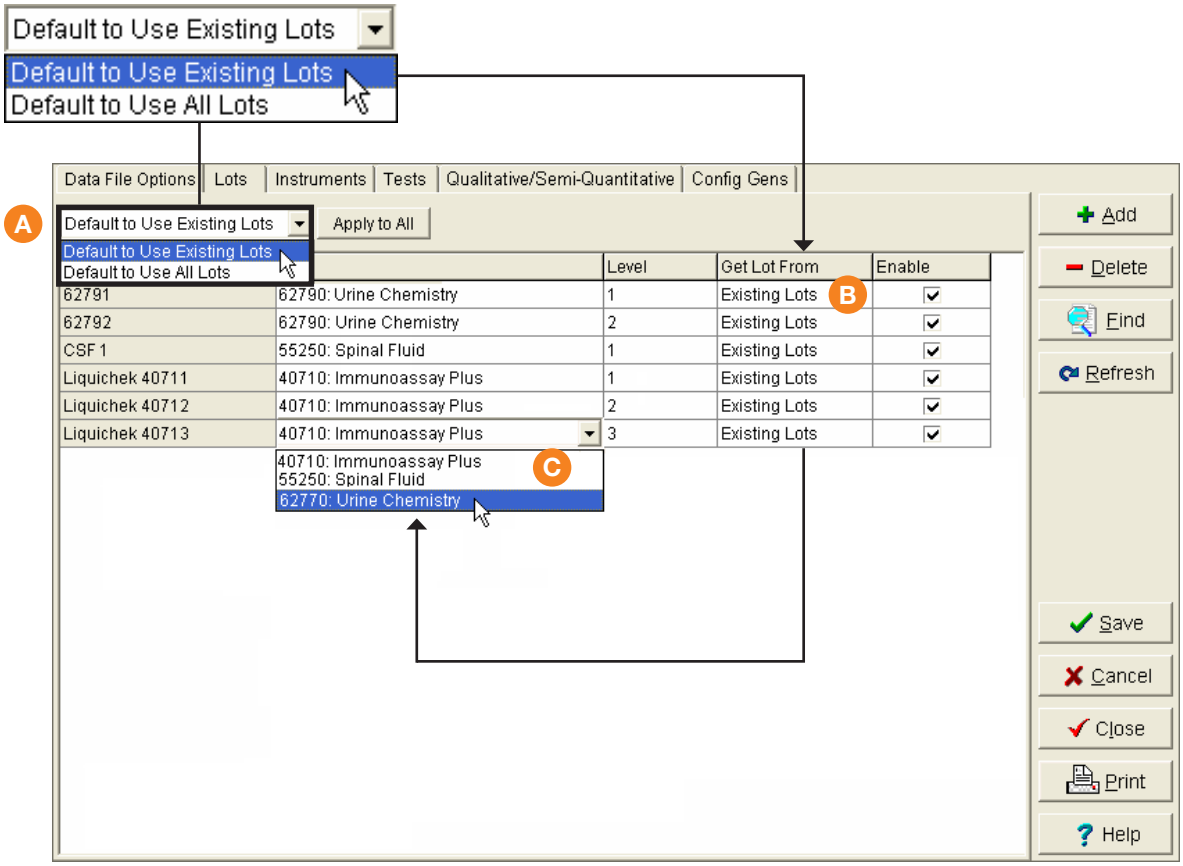


Example Lots Tab (continued)



1 Database View Setting

Select an option from the Default to Use list A to determine the default setting for the Get Lot From column B. The setting in the Get Lot From column determines the information appearing in the Lot Number: Product list C for an individual row.



There are two options available:

- **Default to Use Existing Lots**

  Only lots set up in your QC data management software appear in the list in the **Lot Number: Product** column if this option is selected.

- **Default to Use All Lots**

  All lots in the Unity code list appear in the list in the **Lot Number: Product** column if this option is selected.

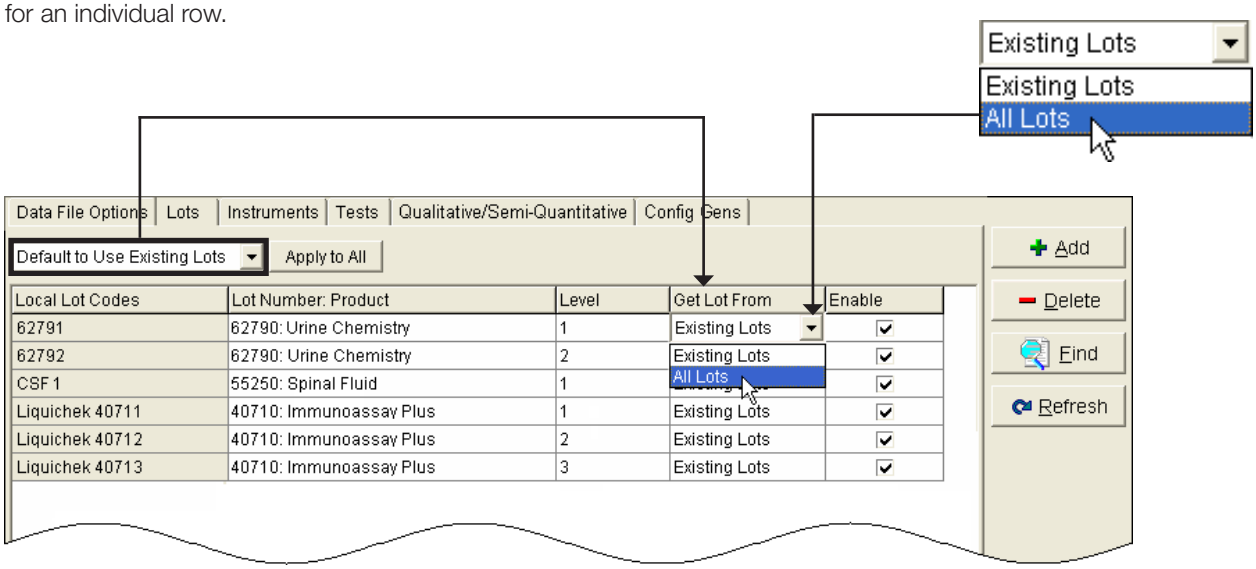
> **Tip**: The process for configuring a new lot depends on your use of your QC data management software for SPC Rule Evaluation. See Chapter 10, “New Configuration in UnityConnect” for more information about new configuration of lots.

2 Apply to All

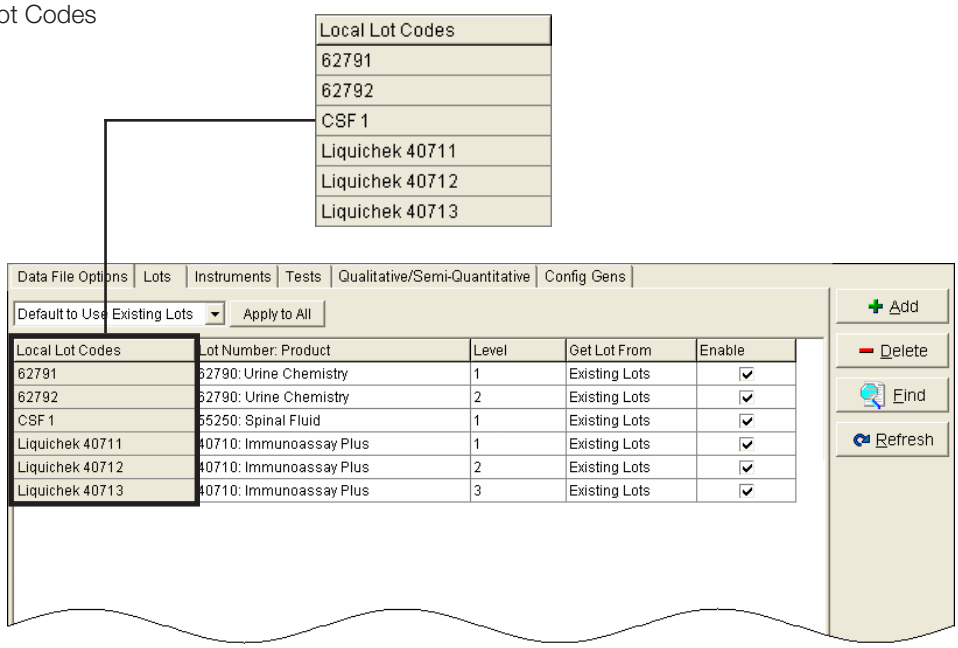
Click **Apply to All** to apply the **Default to Use** selection to all lots. Use the **Get Lot From** list to change the selection for individual rows if necessary (see 3).

3 Get Lot From

The default setting is determined by the **Database View Setting** selected (see 1 on page 34). Select another option from the list to change the information appearing in the **Lot Number: Product** list for an individual row.

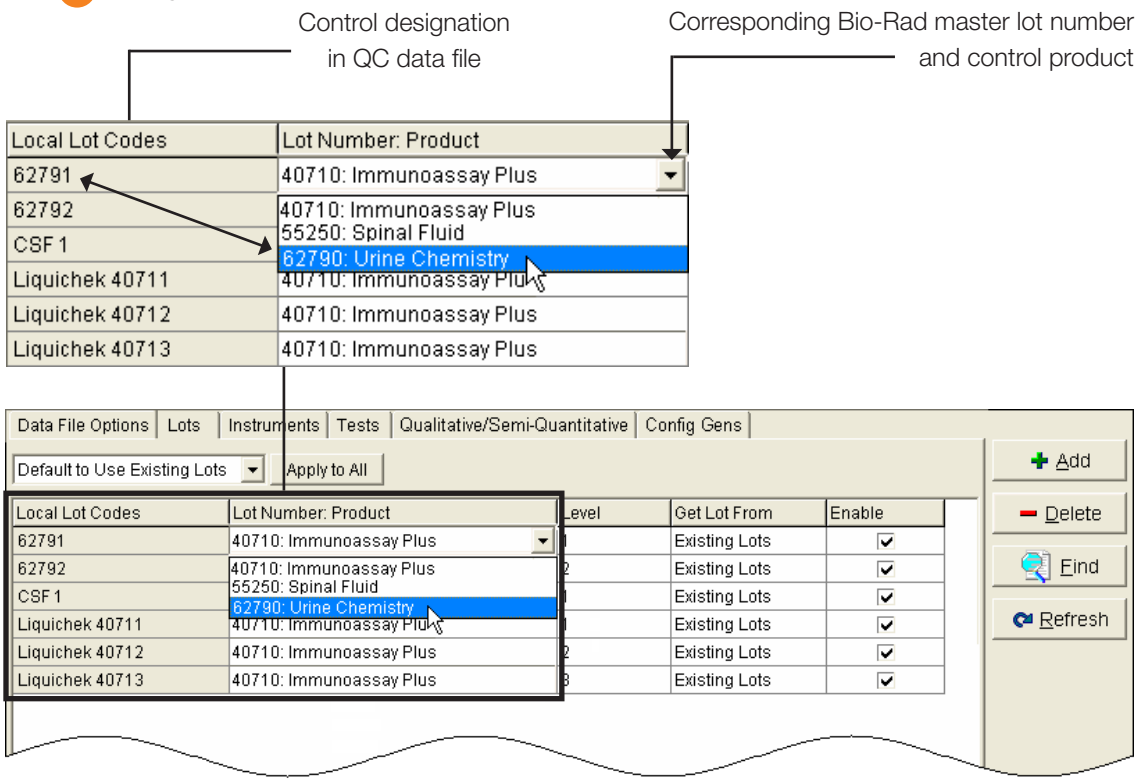


4 Local Lot Codes



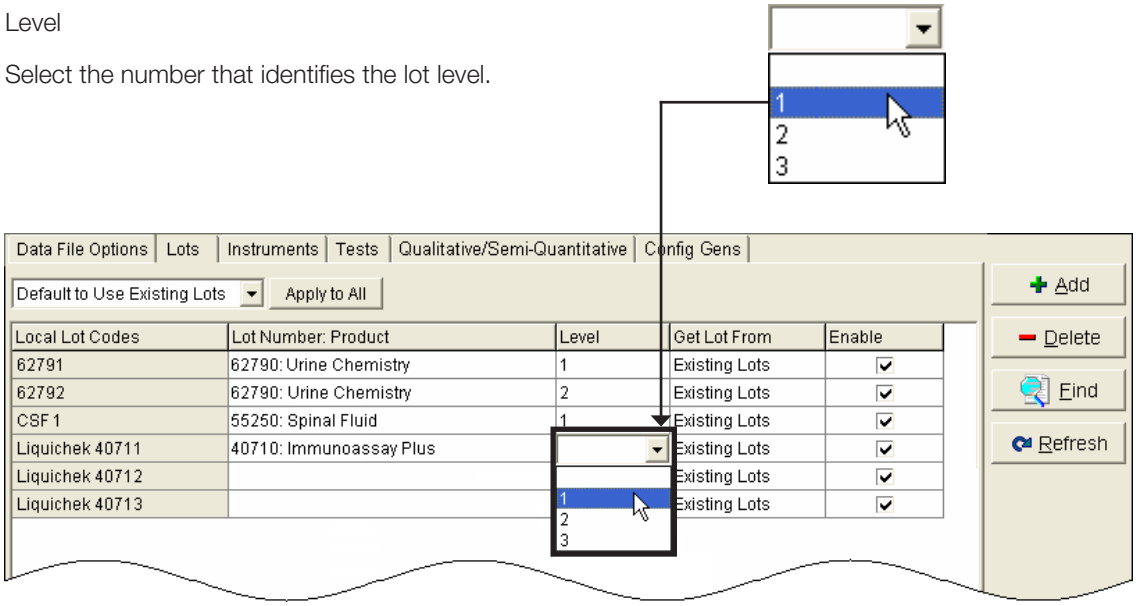
5 Lot Number: Product

Select the corresponding Bio-Rad master lot number and control product name from the list. The contents of the list are determined by the **Database View Setting** and/or the **Get Lot From** setting (see 3 on page 35)



6 Level

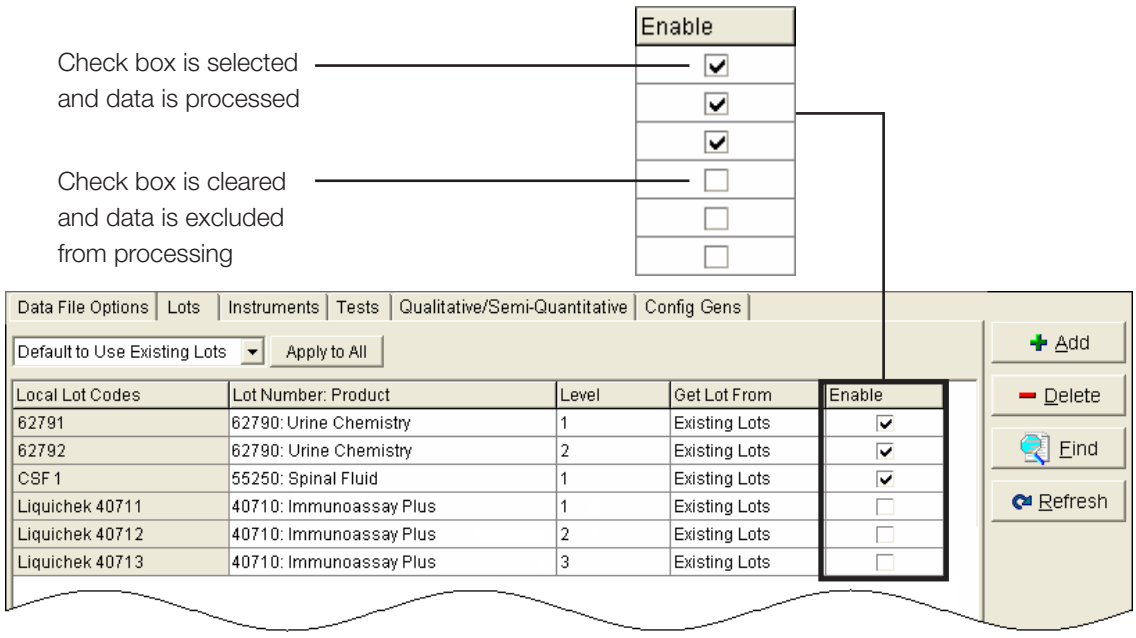
Select the number that identifies the lot level.



7 Enable

The **Enable** check box is selected by default so UnityConnect processes data for the lot/level.

> **Important**: Click the **Enable** check box to clear it and UnityConnect will exclude the lot from current and future transforming. DO NOT delete the row. Deleting the row will cause the lot to appear again for future transforming.



Special Cases Tab

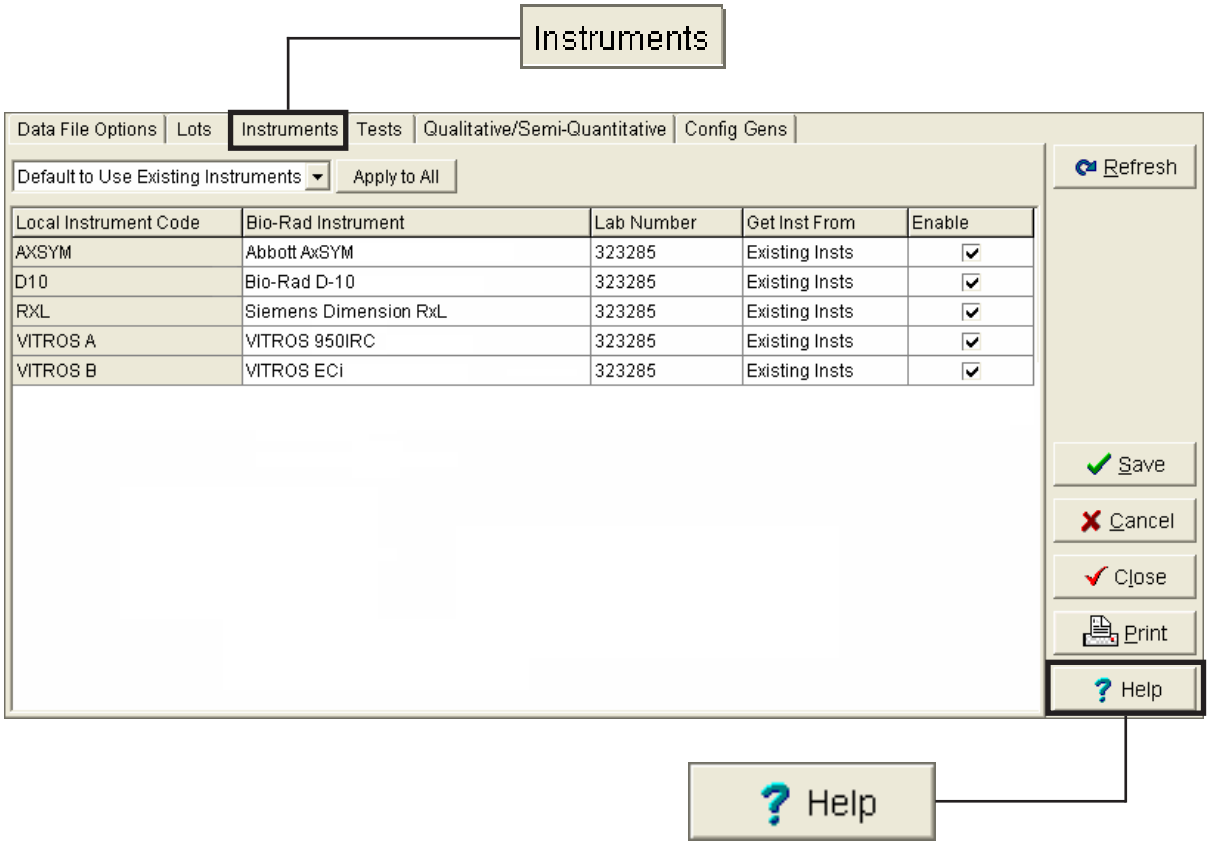
Important: Due to the unique configuration of your customized UnityConnect software, talk to your Bio-Rad representative if you need to use the **Special Cases** tab.

Instruments Tab

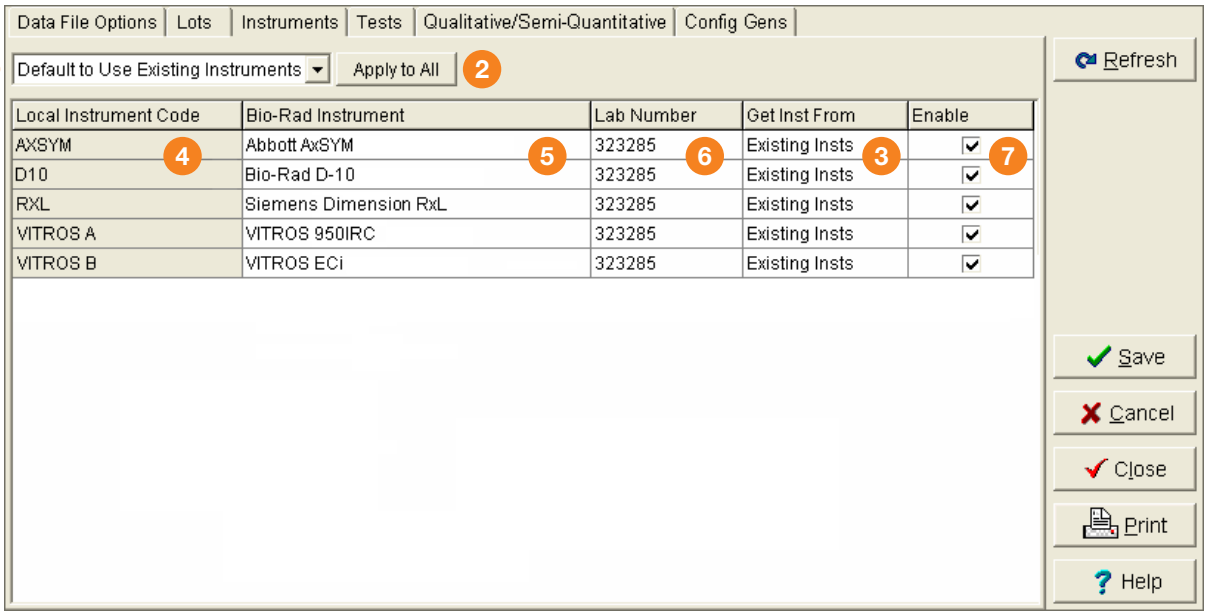
The **Instruments** tab contains all of your specific instrument information.

Important: Instrument configuration in UnityConnect varies according to specific information in the QC data file. Therefore, the example configuration information shown in this section may not be identical to your software. Click Help located in the lower right corner of the window to view customized online help for your transformer.

Example Instruments Tab

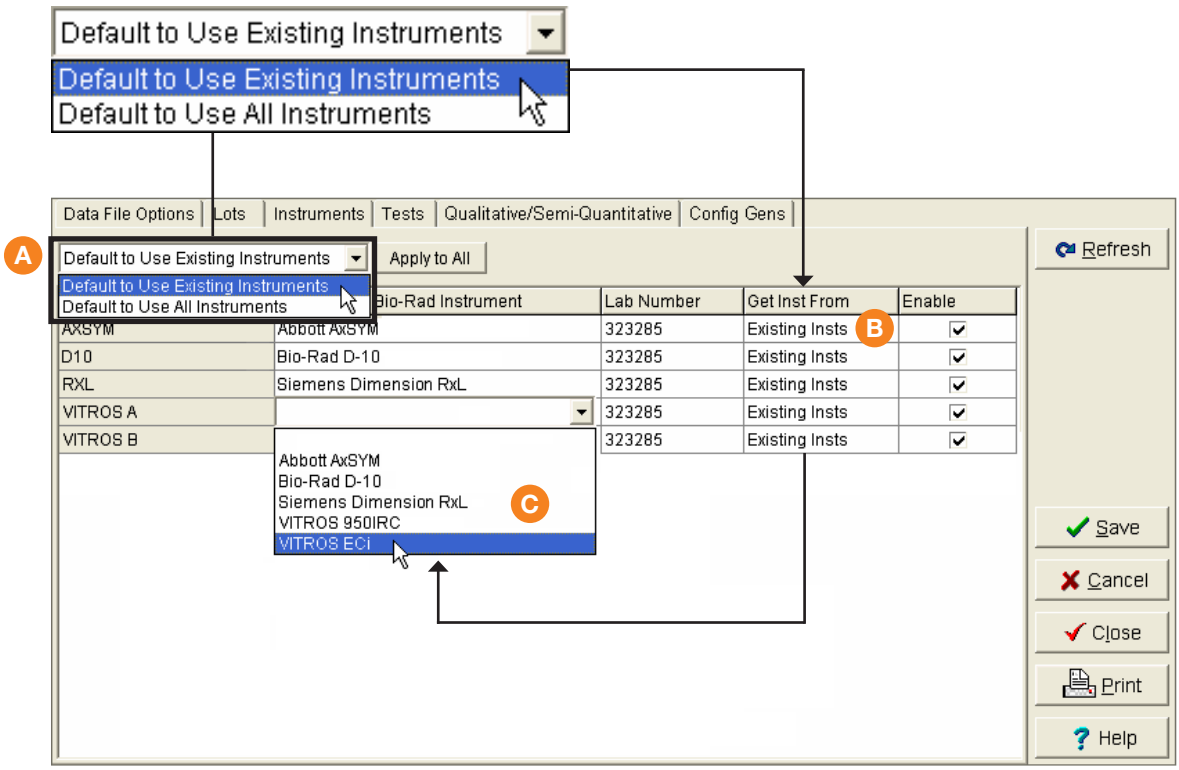


Example Instruments Tab (continued)



1 Database View Settings

Select an option from the **Default to Use** list A to determine the default setting for the **Get Inst From** column B. The setting in the **Get Inst From** column determines the information appearing in the **Bio-Rad Instruments** list C for an individual row.



There are two options available:

- **Default to Use Existing Instruments**

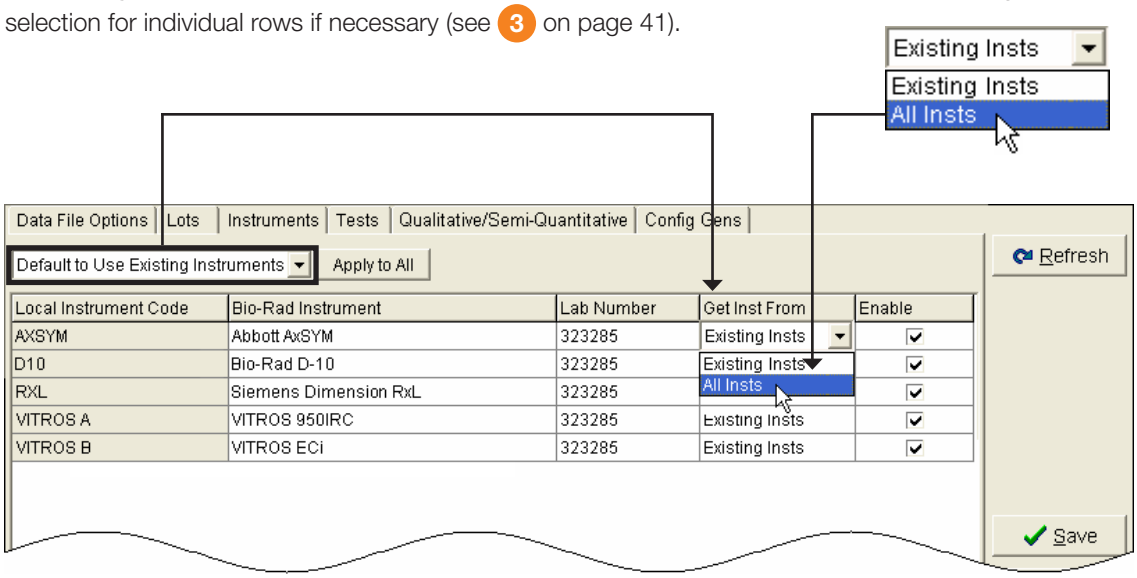
  Only instruments set up in your QC data management software appear in the list in the **Bio-Rad Instrument** column if this option is selected.

- **Default to Use All Instruments**

  All instruments in the Unity code list appear in the list in the **Bio-Rad Instrument** column if this option is selected.

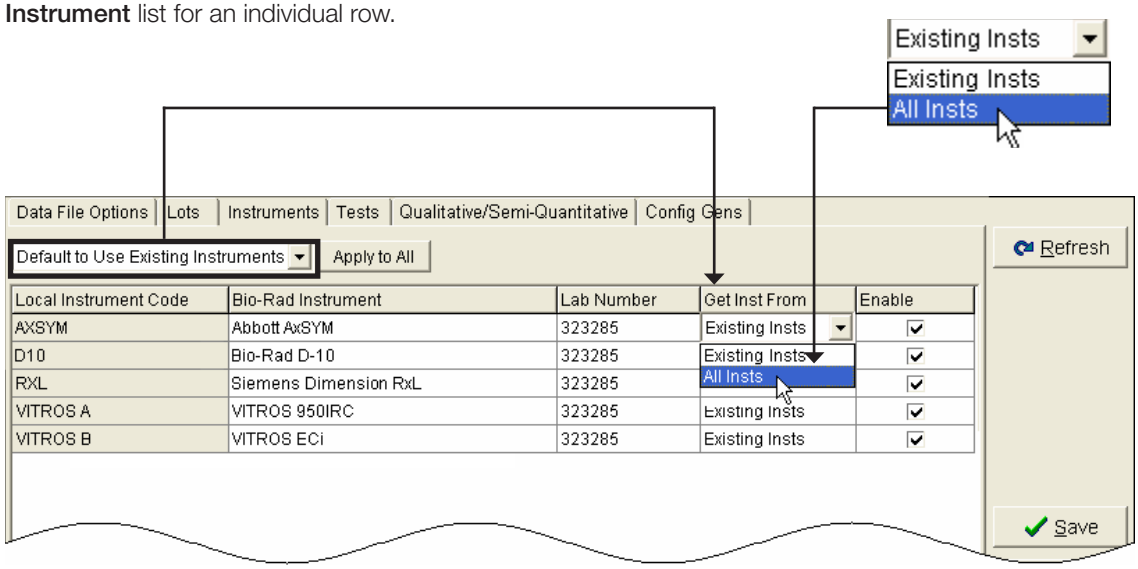
2 Apply to All

Click **Apply to All** to apply the **Default to Use** selection. Use the **Get Inst From** list to change the selection for individual rows if necessary (see 3 on page 41).



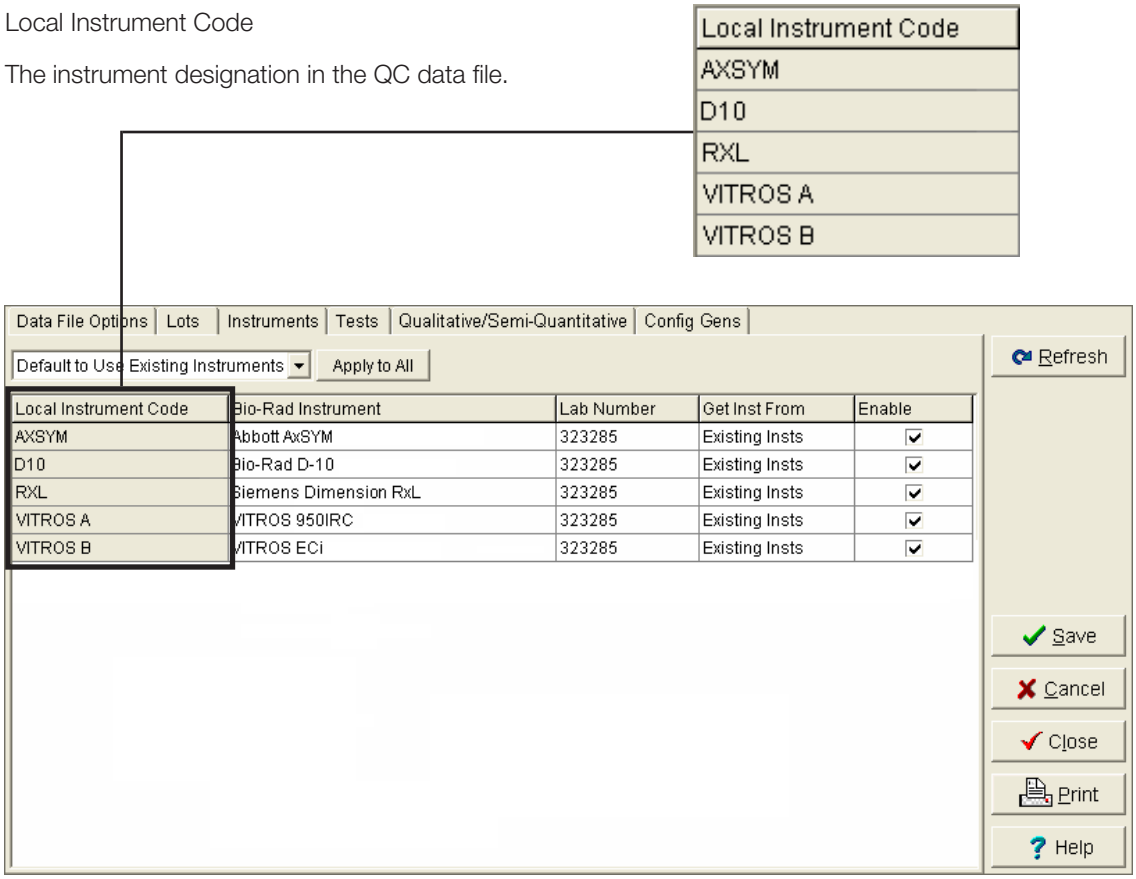
3 Get Inst From

The default setting in this list is determined by the **Database View Setting** selected (see 1 on page 40). Select another option from this list to change the information appearing in the **Bio-Rad Instrument** list for an individual row.



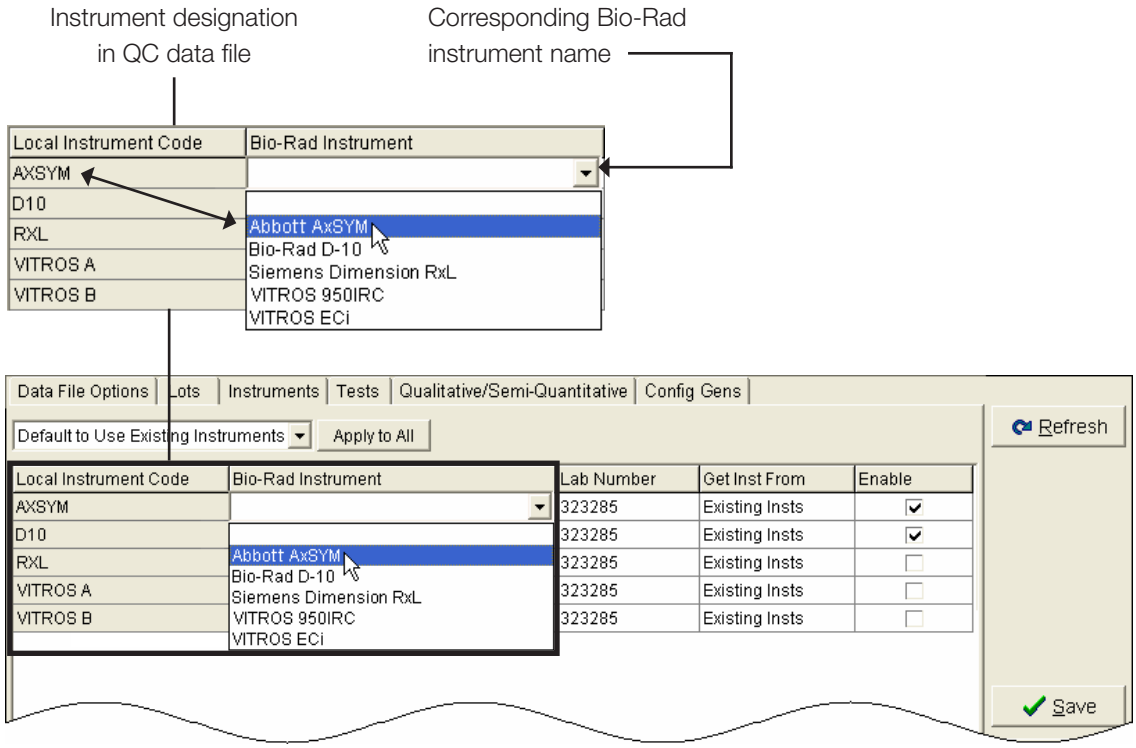
4 Local Instrument Code

The instrument designation in the QC data file.



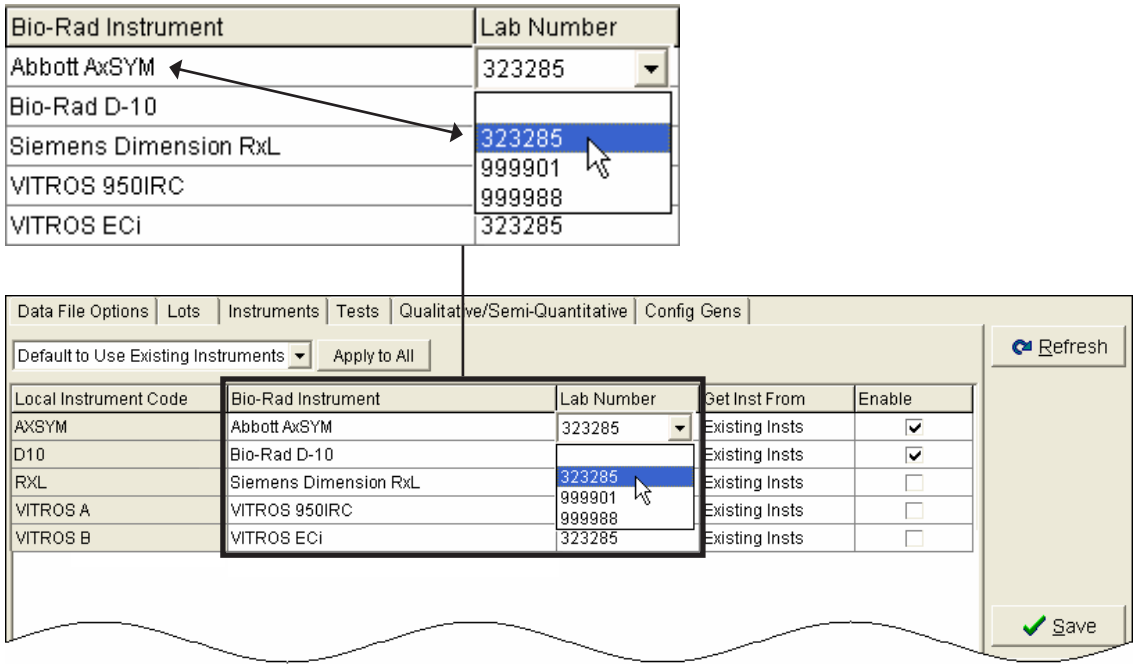
5 Bio-Rad Instrument

Select the corresponding Bio-Rad instrument name from the list. The contents of the list are determined by the Database View Settings and/or the Get Inst From setting (see 3 on page 41).



6 Lab Number

Select the Bio-Rad lab number assigned to the instrument. Only lab numbers set up in your QC data management software appear in the list.

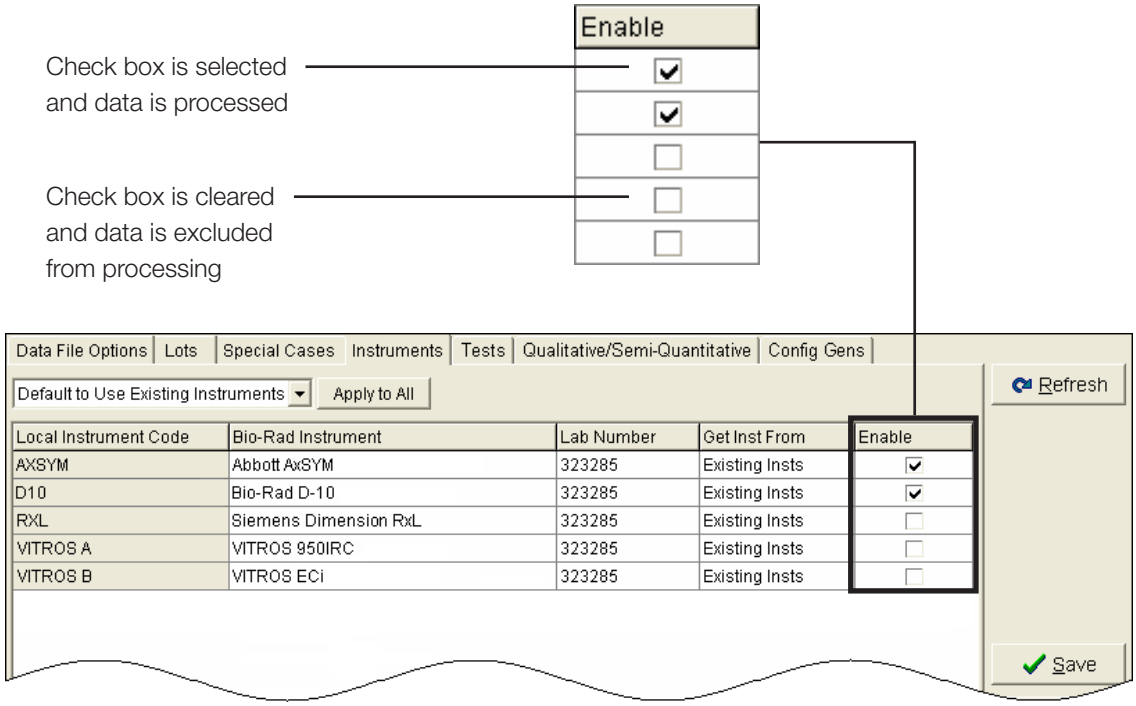


Important: Two instruments of the same type must be set up in separate lab numbers. A lab number can only be assigned by Bio-Rad. Contact your Bio-Rad QC Program Representative if you need additional lab numbers.

7 Enable

The **Enable** check box is selected by default so UnityConnect processes data for the instrument.

> **Important**: Click the **Enable** check box to clear it and UnityConnect will exclude the instrument from current and future transforming. DO NOT delete the row. Deleting the row will cause the instrument to appear again for future transforming.

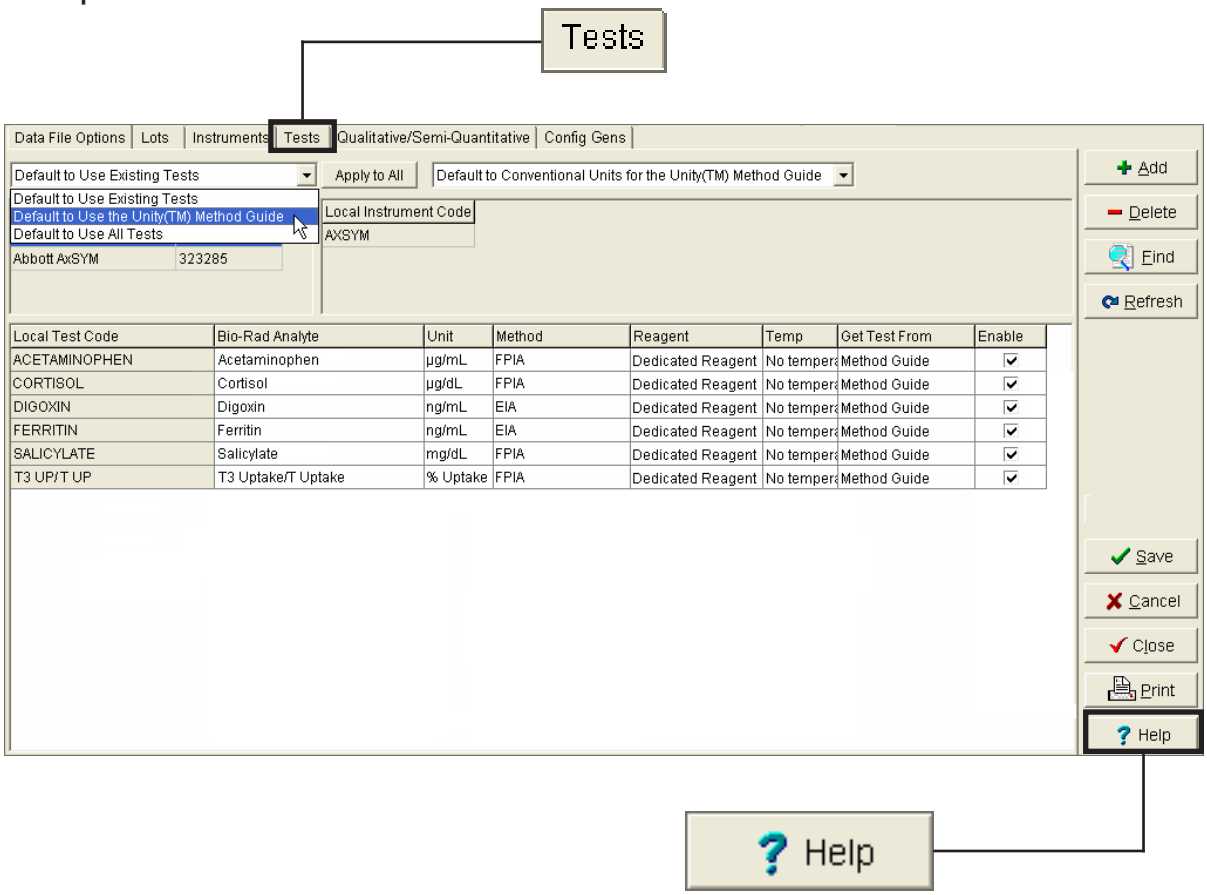


Tests Tab

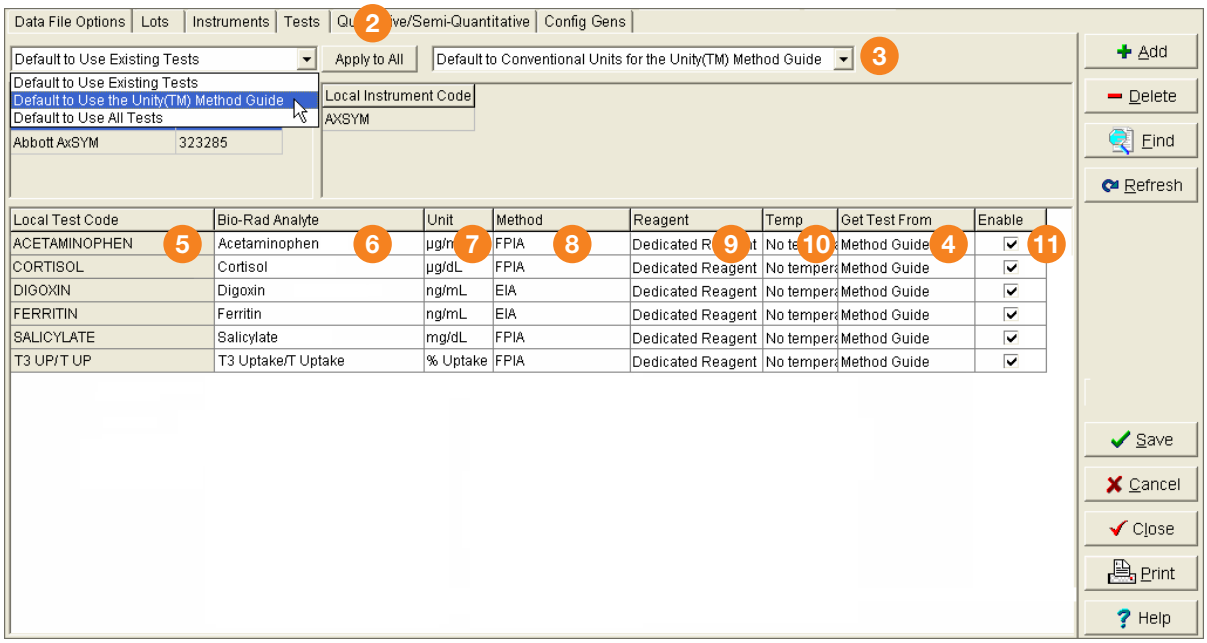
The **Tests** tab contains all of your specific test information.

Important: Test configuration in UnityConnect varies according to specific information in the QC data file. Therefore, the example configuration information shown in this section may not be identical to your software. Click Help located in the lower right corner of the window to view customized online help for your transformer.

Example Tests Tab

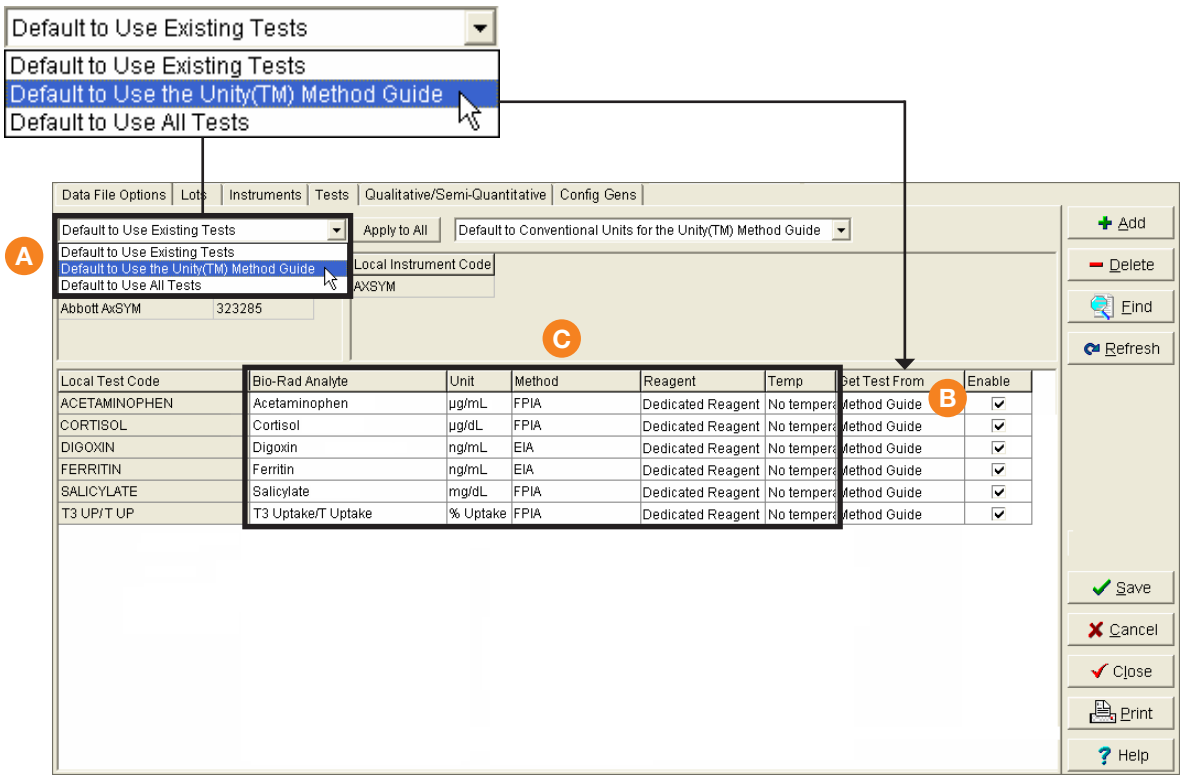


Example Tests Tab (continued)



1 Database View Settings

Select an option from the **Default to Use** list A to determine the default setting for the **Get Test From** column B The setting in the **Get Test From** column determines the information appearing in the **Bio-Rad Analyte**, **Unit**, **Method**, **Reagent**, and **Temp** columns C for an individual row.



There are three options available:

- **Default to Use Existing Tests**

  Analyte information for tests set up in your QC data management software and run on the specified instrument appear in the lists in the **Bio-Rad Analyte**, **Unit**, **Method**, **Reagent**, and **Temp** columns if this option is selected.

- **Default to Use Method Guide**

  Only the analyte information for tests defined in the *Unity Method Guide for Selected Instruments* appear in the **Bio-Rad Analyte**, **Unit**, **Method**, **Reagent**, and **Temp** columns if this option is selected.

- **Default to Use All Tests**

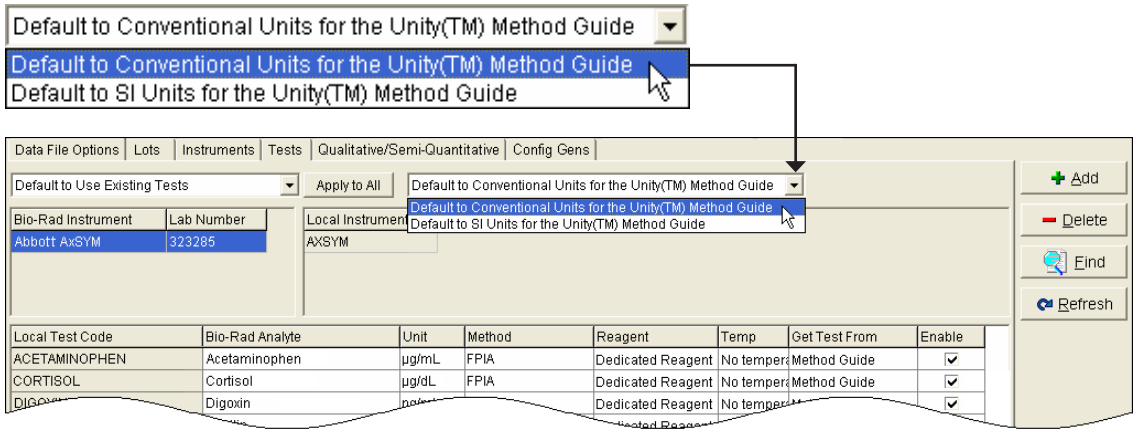
  All analyte information in the Unity code list appear in the **Bio-Rad Analyte**, **Unit**, **Method**, **Reagent**, and **Temp** columns if this option is selected. This is the most useful method if tests are not defined in the *Unity Method Guide for Selected Instruments*.

2 Apply to All

Click Apply to All to apply the Database View Setting and/or the Default to Use Units selection(s). Use the Get Test From list to change the selection Database View Setting for individual rows if necessary (see 4 on page 49).

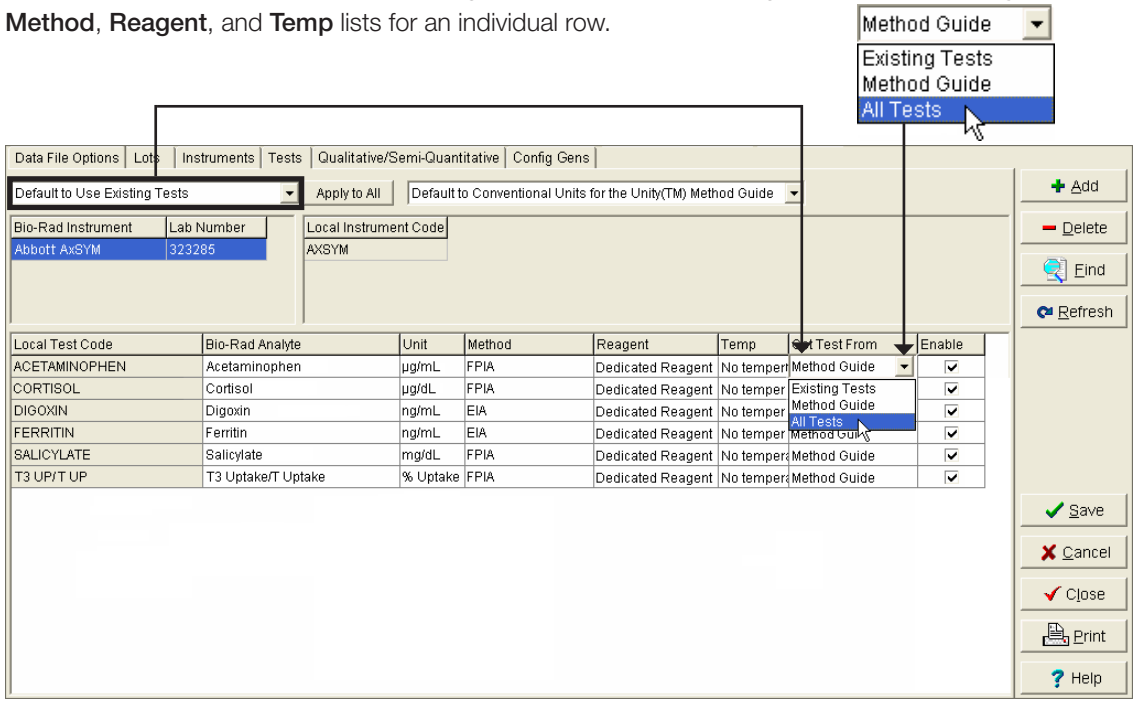
3 Default to Use Units

Select the units (conventional or SI) to apply the units selection to all tests.



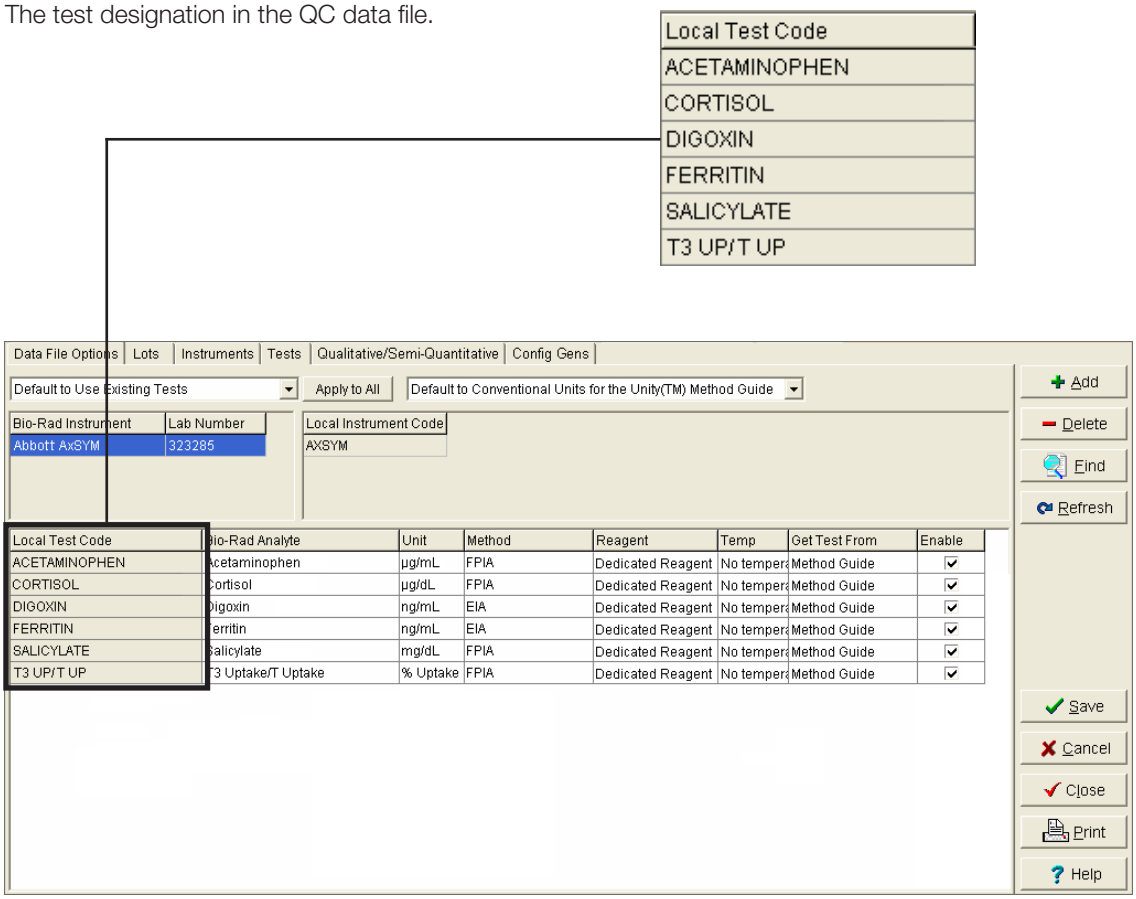
4 Get Test From

The default setting is determined by the **Database View Setting** selected (see 1 on page 48). Select another option from this list to change the information appearing in the **Bio-Rad Analyte**, **Unit**, **Method**, **Reagent**, and **Temp** lists for an individual row.



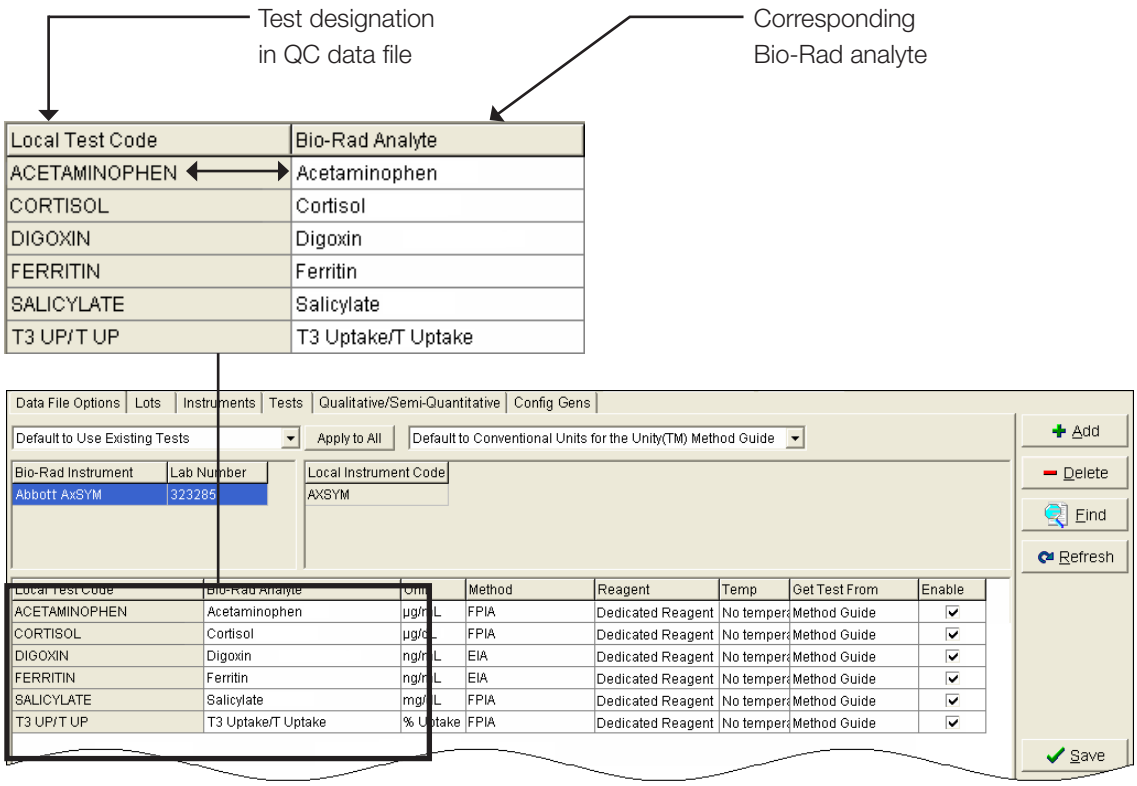
5 Local Test Code

The test designation in the QC data file.



6 Bio-Rad Analyte

Select the corresponding Bio-Rad analyte name from the list. The contents of the list are determined by the **Database View Setting** and/or the **Get Test From** setting (see 4 on page 49).



7 Unit

Select the corresponding unit from the list. The contents of the list are determined by the **Database View Setting** and/or the **Get Test From** setting (see 4 on page 49).

8 Method

Select the corresponding method from the list. The contents of the list are determined by the **Database View Setting** and/or the **Get Test From** setting (see 4 on page 49).

9 Reagent

Select the corresponding reagent from the list. The contents of the list are determined by the **Database View Setting** and/or the **Get Test From** setting (see 4 on page 49).

10 Temp

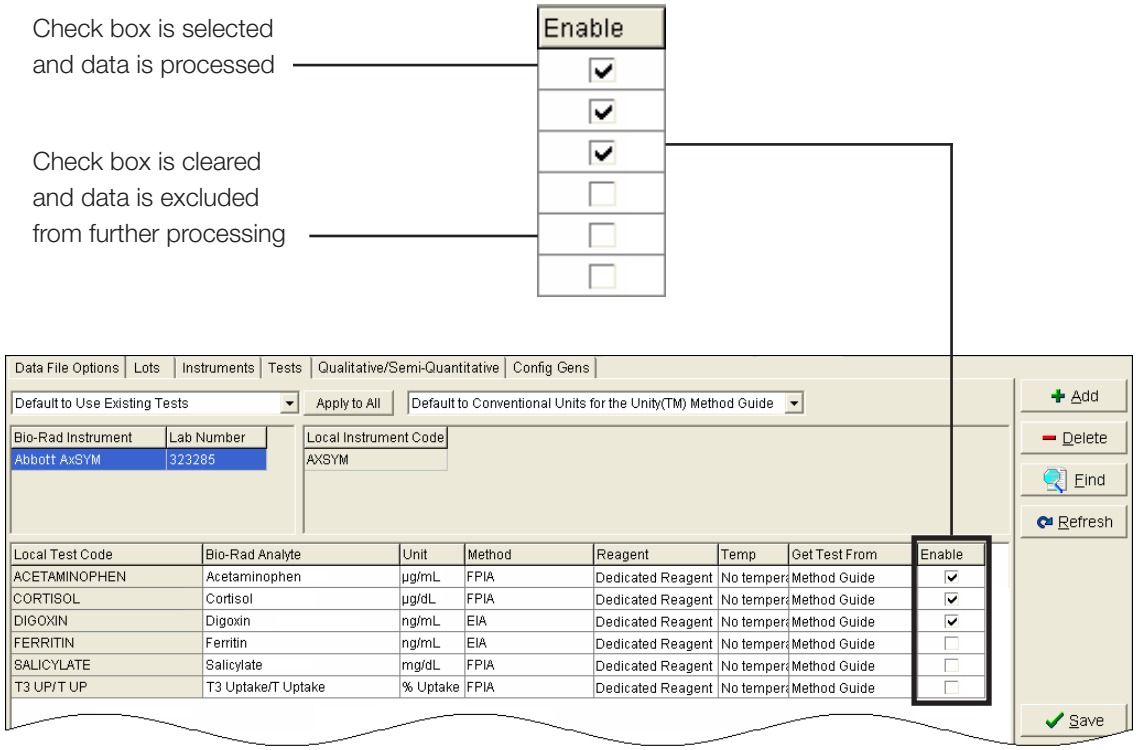
Select the corresponding temperature from the list. The contents of the list are determined by the **Database View Setting** and/or the **Get Test From** setting (see 4 on page 49).

Note: Temperature applies to enzymes only. For all other analytes, **No Temperature** is the only available option.

11 Enable

The Enable check box is selected by default so UnityConnect processes data for the test.

> **Important**: Click the **Enable** check box to clear it and UnityConnect will exclude the lot from current and future transforming. DO NOT delete the row. Deleting the row will cause the lot to appear again for future transforming.



Qualitative/Semi-Quantitative Tab

> **Important**: Due to the unique configuration of your customized UnityConnect software, talk to your Bio-Rad representative if you need to use the **Qualitative/Semi-Quantitative** tab.

Config Gens Tab

> **Important**: The **Config Gens** tab only applies to customers with specific VITROS instruments. See Chapter 11, "VITROS Slide Generation Numbers and UnityConnect" on page 201 for more information about configuring slide generation numbers.

CHAPTER 2

Working with QC Data Files

In This Chapter

Overview

Note: This chapter discusses QC data files used in the **data file transfer method** with UnityConnect.

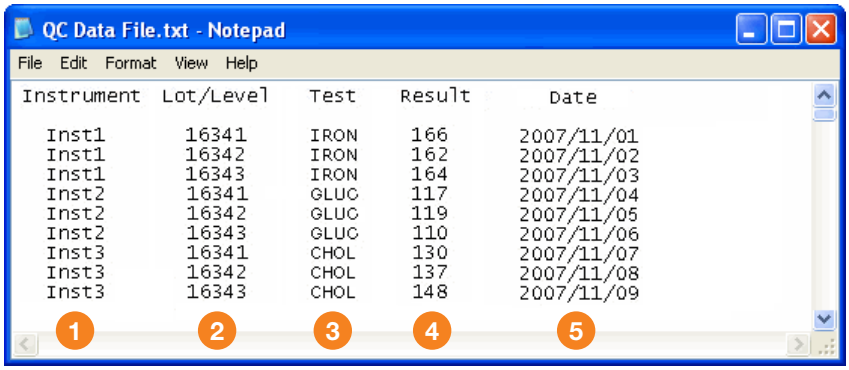
A QC data file contains the quality control testing results performed on an instrument. The QC data file can be retrieved from an instrument, middleware, or a Laboratory Information System (LIS).

QC data management software cannot import QC data files in their original format. UnityConnect transforms the QC data file from the original format into the Bio-Rad format for automatic importing into your QC data management software.

Note: See Chapter 3, "Configuring UnityConnect for Data File Transfer with Desktop Software" for information about configuring UnityConnect for automatic importing. QC data management software includes desktop software (Unity Desktop and Unity Real Time), and Web-based software (UnityWeb 2.0 and Unity Real Time online).

QC Data File Content

The QC data file is the most critical component of the UnityConnect process. Although the look of QC data files varies according to the instrument, middleware, or LIS, the essential components are the same.



A proper QC data file contains unique designations for each component of the data file.

1. Unique designation for each instrument

   Each instrument has a unique designation in the example above: Inst1, Inst2, and Inst3.

2. Unique designation for the lot number and level

   Each lot number and level has a unique designation in the example above: 16341 (lot 16340-level 1), 16342 (lot 16340-level 2), 16343 (lot 16340-level 3).

3. Unique test name

   Each test has a unique designation in the example above: IRON, GLUC, and CHOL.

4. Test result

   Each result has a valid numeric value in the example above.

   > **Note**: UnityConnect cannot transform data with a 0 (zero) or negative numeric value.

5. Date of each test result

   Each result has an associated date. The format used in the example above is year/month/day.

QC Data File Essentials

A properly formatted QC data file from your instrument, middleware, or LIS is essential to the UnityConnect process. A good data file allows UnityConnect to transform the QC data into a format that can be automatically imported into your QC data management software.

Note: See Chapter 3, "Configuring UnityConnect for Data File Transfer with Desktop Software" for information about configuring UnityConnect for automatic importing.

- The QC data file must be comprehensive and contain a unique designation for each instrument as well as all lots, levels, and tests run on Bio-Rad controls.
- The data file must include a value and a date for all QC data to be submitted to Bio-Rad for peer group comparison.
- The QC data file must be in a stable format that can be reproduced as often as necessary. You must create a new QC data file every time you use UnityConnect to transform and import the QC data into your QC data management software.

Important: Bio-Rad strongly recommends carefully documenting the steps taken to create the QC data file as this will become part of your regular QC process.

Maintaining QC Data File Integrity

Maintaining the integrity of the QC data file is very important. Never open the original QC data file to be used for transforming data. In some cases, opening a file alters the formatting and causes the QC data file to become useless.

Important: Do not open or manually alter the data in the original QC data file. For example, manually deleting outliers can corrupt the file.

If it is necessary to open a QC data file, make a copy of the file and open the copy. See "Copying a QC Data File" on page 59 for more information.

Multiple QC Data Files

For ease of use and simplicity, Bio-Rad recommends creating one QC data file containing all QC data. However, some instruments, middleware, and LIS separate QC data into multiple files. For example, customers using an Orchard LIS or a Beckman Coulter Access instrument are required to create multiple QC data files for different control products, levels, or different tests. See the following section according to the QC data management software you use:

- Desktop software

  See "Working with Multiple QC Data Files" on page 148.

- Web-based software

  See "Working with Multiple QC Data Files" on page 159.

Single Point Data versus Summary Data

UnityConnect can process single point data or summary data.

Single Point Data

Single point data files contain an individual value for each QC result. Single point data is typically preferred since it facilitates the use of advanced features of your QC data management software such as Levey-Jennings Charts, SPC (Westgard) rules, and the optional Westgard Advisor.

Summary Data

Summary data files contain the mean, standard deviation (SD), and number of points collected for each test over one month. Using summary data limits the availability of advanced features of your QC data management software.

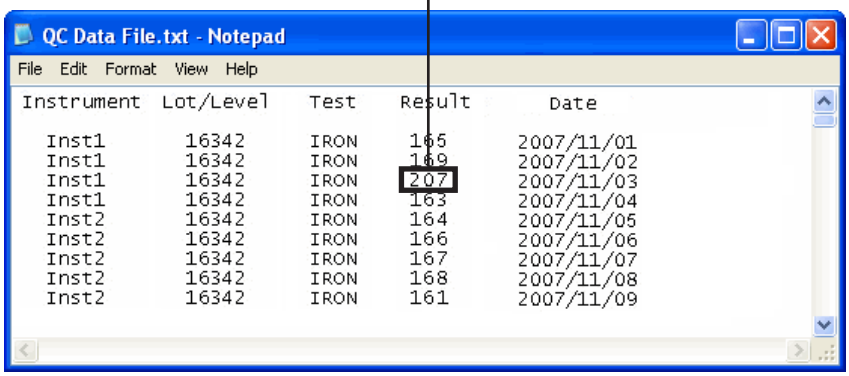
Unfiltered Data versus Filtered Data

UnityConnect can process unfiltered QC data or filtered QC data. It is important to understand the difference between the two types of data.

Unfiltered Data

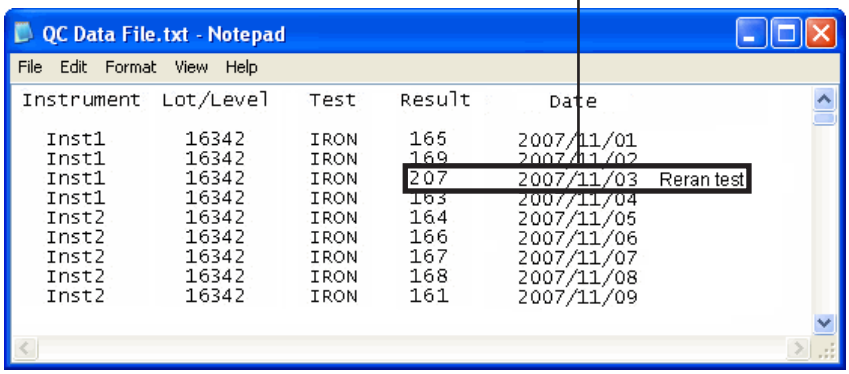
A QC data file is considered unfiltered when no outliers have been removed or excluded in the instrument, middleware, or LIS. The following illustration shows an example of an unfiltered QC data file.

Unfiltered QC data file
with outlier



It is important to understand how your instrument, middleware, or LIS handles outliers in the QC data file. For example, the next illustration shows the same outlier, but in this case the LIS recognized the outlier and required a comment be added.

Unfiltered QC data file with outlier and comment



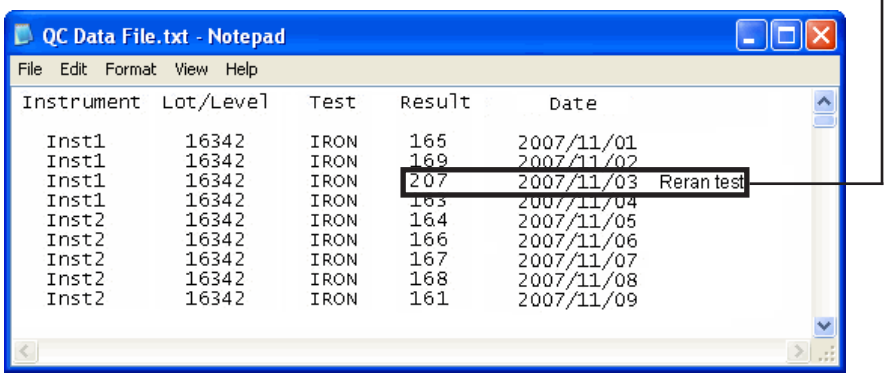
Although the LIS required a comment be added to the outlier, the outlier was not removed and therefore the QC data file is still considered unfiltered. To determine if a QC data file is unfiltered, make a copy of the data file, open the file, and search for a known outlier. (See “Copying a QC Data File” on page 59 for more information.)

Important: Do not open or manually alter the data in the QC data file. For example, manually deleting outliers can corrupt the file.

Filtered Data

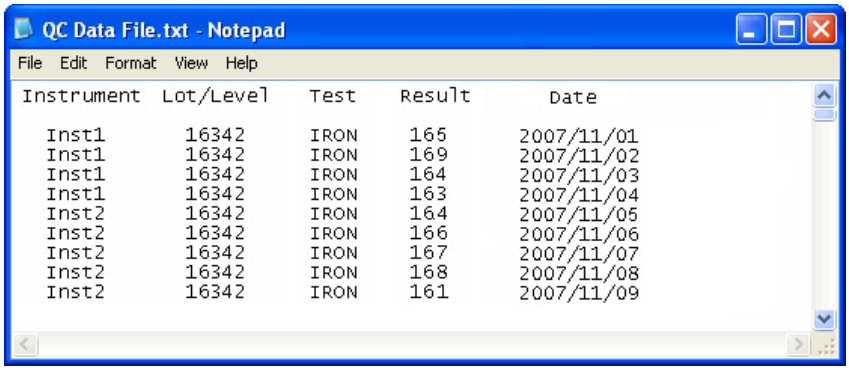
A QC data file is considered filtered when the outliers have been removed or excluded in the instrument, middleware, or LIS. The following example shows a comparison between an unfiltered QC data file and a filtered QC data file.

QC data file—unfiltered showing outlier and comment



Same QC data file–filtered

The outlier (207) and comment have been removed or excluded in the instrument, middleware, or LIS.



Creating a QC Data File

The steps for creating a data file vary according to the instrument, middleware, or LIS. Bio-Rad has directions for creating QC data files for most of the common instruments, middleware, and LIS.

Important: If Bio-Rad does not have directions for creating a QC data file on your instrument, middleware, or LIS, contact your laboratory's instrument, middleware, or LIS specialist or contact the instrument, middleware, or LIS manufacturer.

How Often to Create a QC Data File

You must create a new QC data file every time you use UnityConnect to transform and import QC data into your QC data management software. This must be done at least on a monthly basis in order to submit the QC data to Bio-Rad for peer group comparison and Unity Interlaboratory Reports.

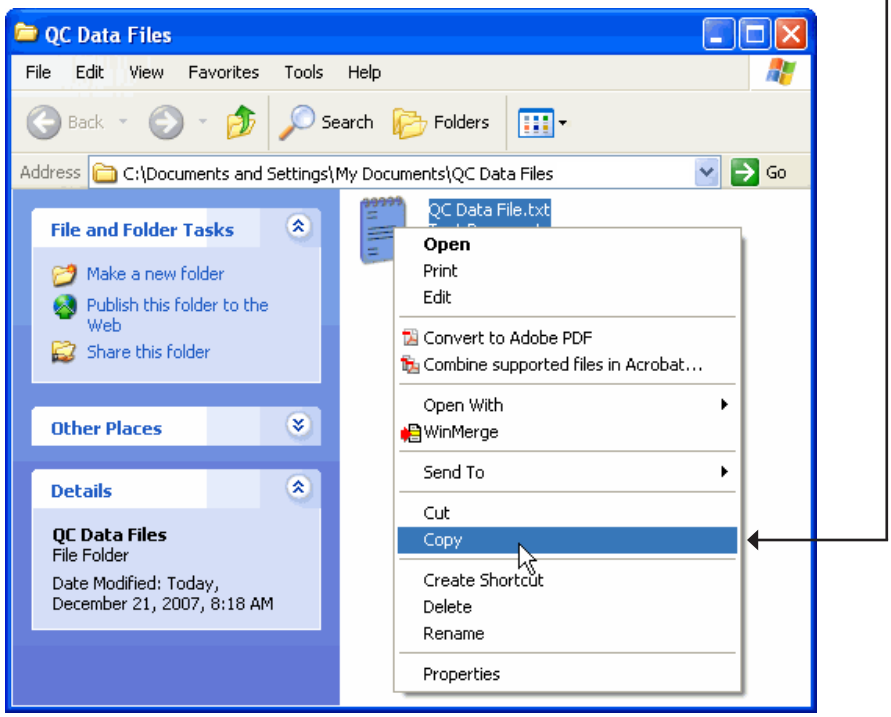
Some customers find that 30 days of data is a very large file. In such cases, a QC data file can be created, transformed, and imported into your QC data management software more frequently as needed.

Best Practices—Transform Data Often

Bio-Rad recommends transforming data as often as possible throughout the month. This helps you become more familiar with the transformation process and alleviates the stress and pressure at the end of the month.

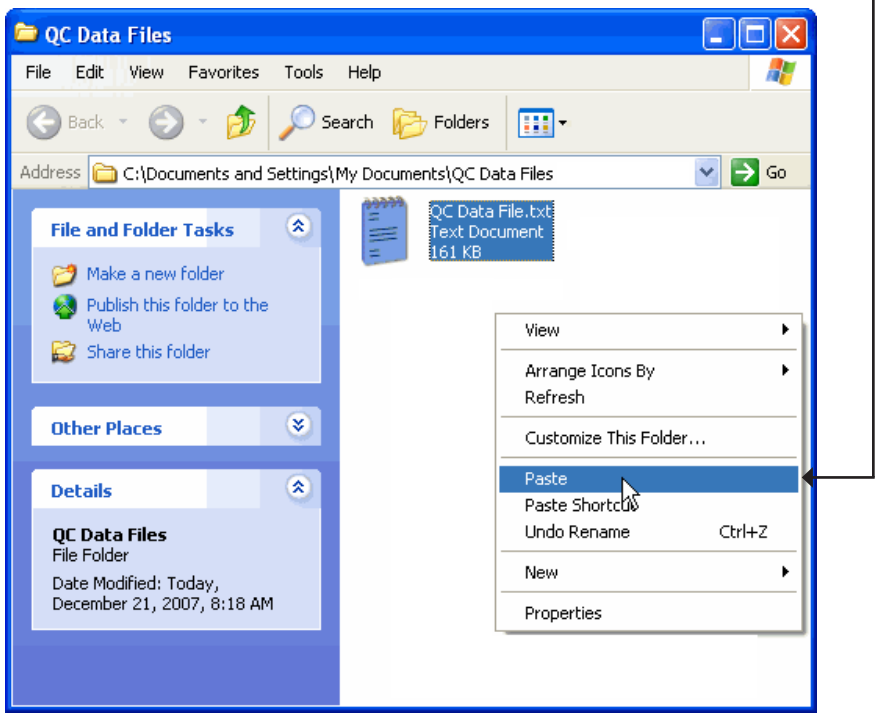
Copying a QC Data File

1 Right click on the original file and then click **Copy**.

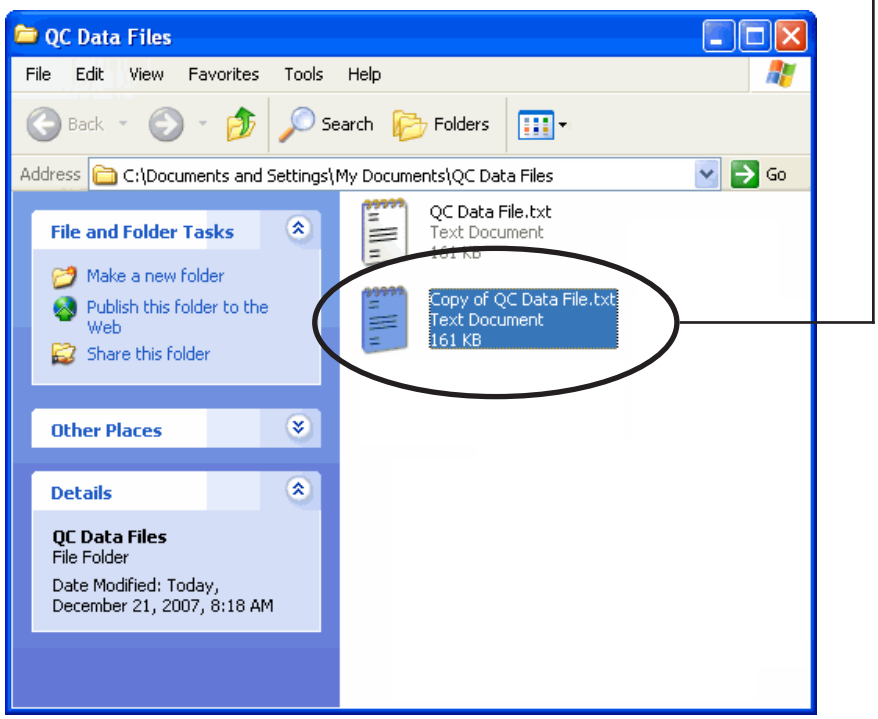


2 Move the mouse away from the original data file.

3 Right click in the window and then click **Paste**.



A copy of the data file appears in the window.



4 The copy of the QC data file can be opened and reviewed.

Important: Only use an original QC data file that has not been opened to transform your QC data.

CHAPTER 3

Configuring UnityConnect for Data File Transfer with Desktop Software

In This Chapter

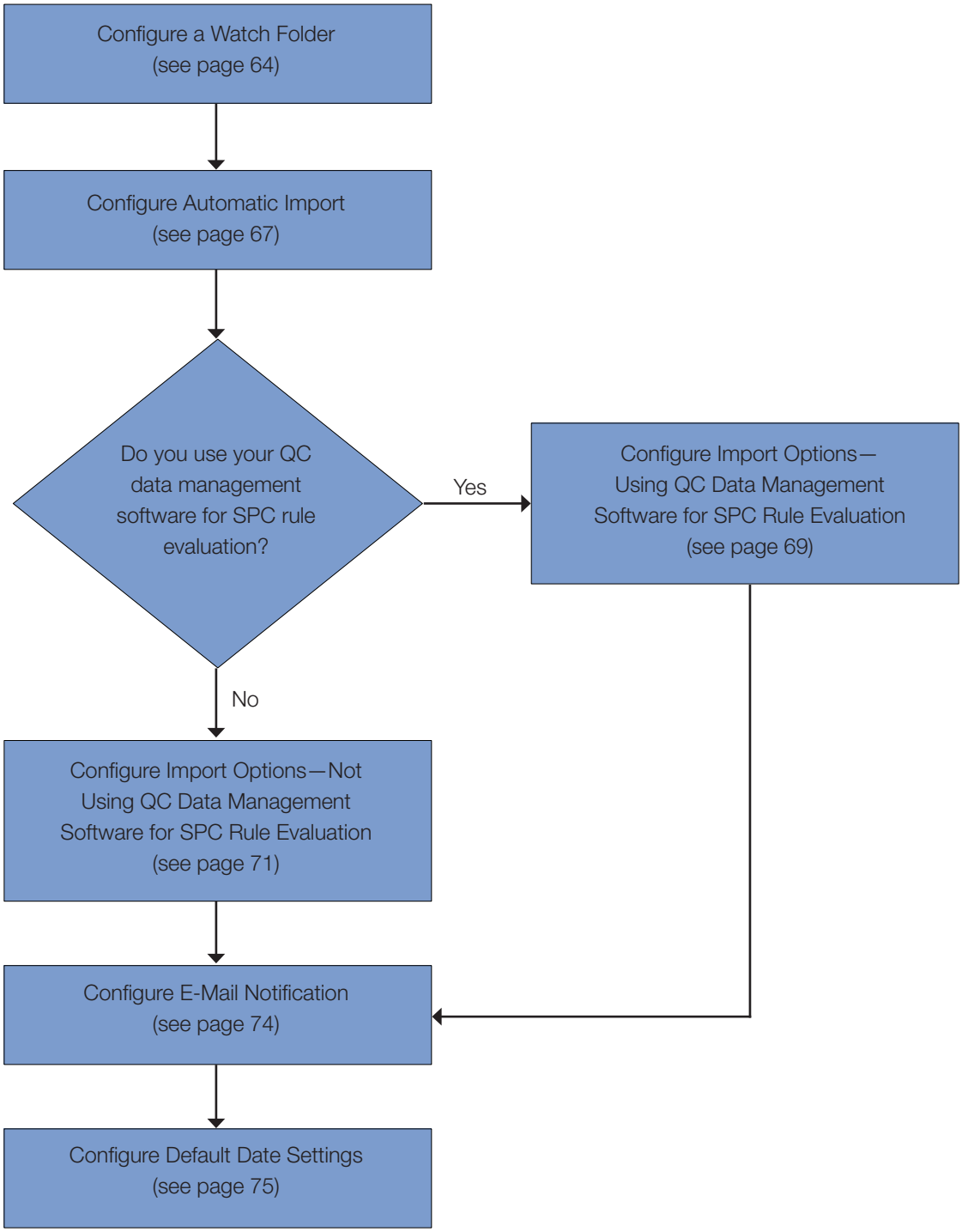
Before You Begin

This chapter is only for customers using UnityConnect with the **data file transfer method** and any of the following **desktop** software:

Unity Desktop

Unity Real Time

Configuration Flow Chart



Output Path

Each installed and licensed transformer in UnityConnect requires an output path. The output path is the location where your transformed QC data file is stored.

In most instances, the output path is the same location for all transformers. However, depending on your laboratory set up, multiple output paths may be useful. For example, if your laboratory uses multiple transformers, it is useful to have a separate output path for each transformer. Consult Bio-Rad for more information.

Important: The output path is pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, do not change the output path. Talk to your Bio-Rad representative for more information about output paths.

Configuring Watch Folder and Automatic Import

UnityConnect can be configured to "watch" for data entering a "Watch Folder" and then automatically import the data into your QC data management software.

Configuring a Watch Folder

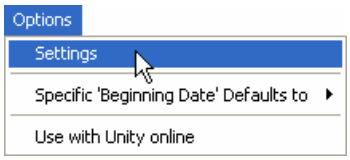
1 Create a new folder on the computer desktop where UnityConnect is installed.

2 Name the folder "Watch Folder."

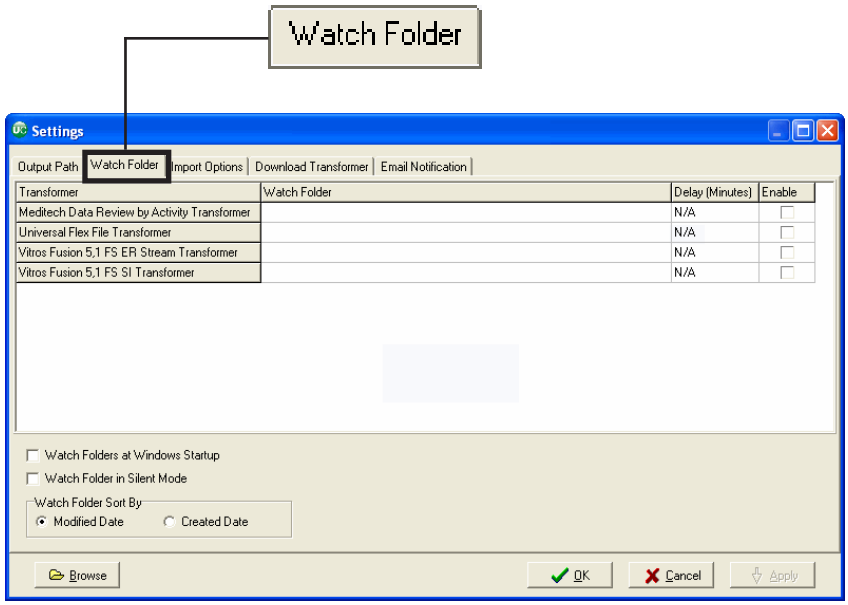
Note: A Watch Folder must be created for each transformer. Give each Watch Folder a unique name if you create more than one Watch Folder. For example, "Watch Folder Meditech" and "Watch Folder RXL." This helps easily identify the Watch Folder for each transformer.

3 Start UnityConnect.

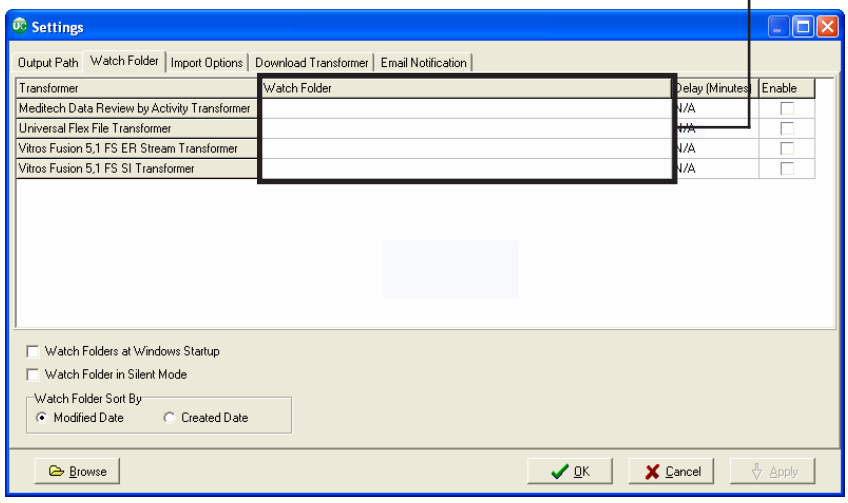
4 Click the **Options** menu and then click **Settings**.



5 Click the **Watch Folder** tab.



6 Click in the **Watch Folder** field for the transformer you want to configure.



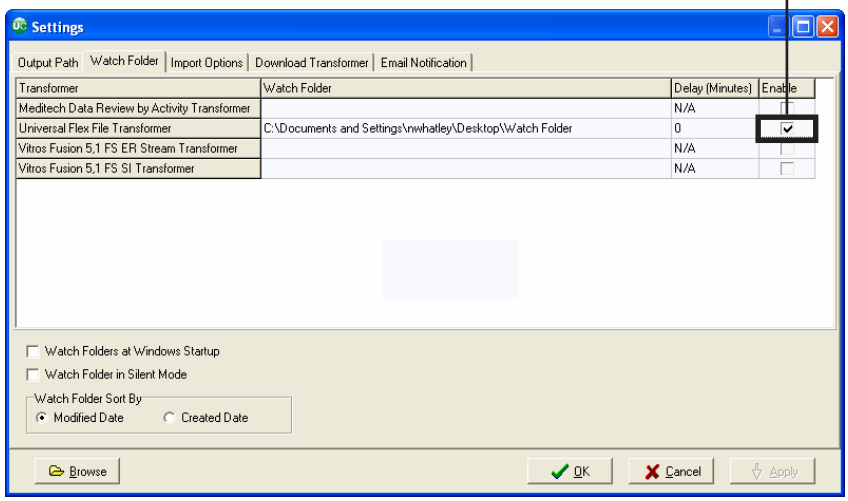
7 Click 

.

8 Select the Watch Folder you created on your computer desktop.

9 Click OK .

10 Select the **Enable** check box for the transformer.



11 Select the **Watch Folders at Windows Startup** check box if you want the Watch Folder to be active each time the computer starts up.

> **Note**: You must click Watch on the UnityConnect main window to make the Watch Folder active if you do not select the **Watch Folders at Windows Startup** check box.

12 Select the **Watch Folder in Silent Mode** check box if you want the Watch Folder to run in silent mode.

> **Note**: Silent mode processes all data in the QC data file that UnityConnect recognizes (that is, all data that has been configured in UnityConnect). If UnityConnect does not recognize any item(s) in the QC data file, a copy of the original QC data is saved for later reprocessing when the unrecognized item(s) can be configured. UnityConnect can also be configured to send an e-mail notification when there are QC data files requiring reprocessing. See “Configuring E-Mail Notification” on page 74 for more information.

13 Select a Watch Folder Sort By option:

- Modified Date
- Created Date

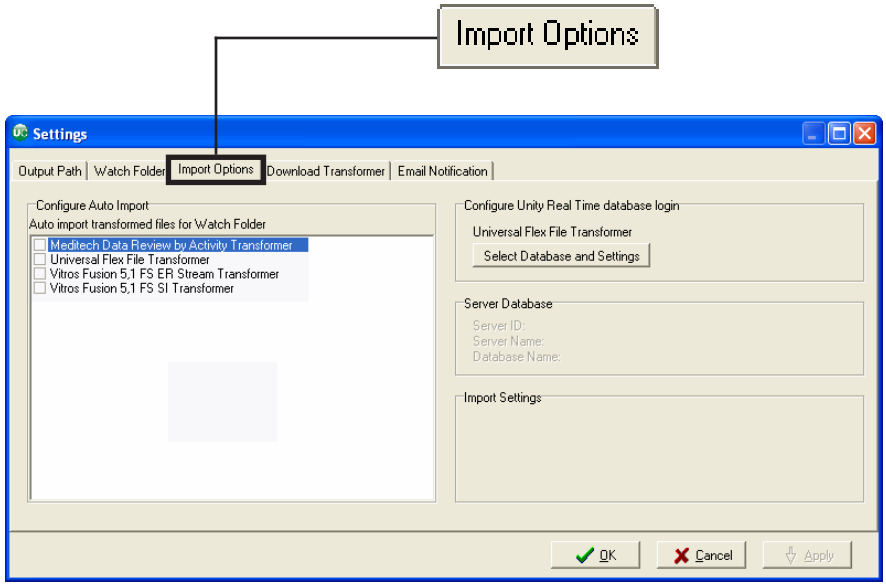
14 Click Apply .

15 Continue with the next section, “Configuring Automatic Import.”

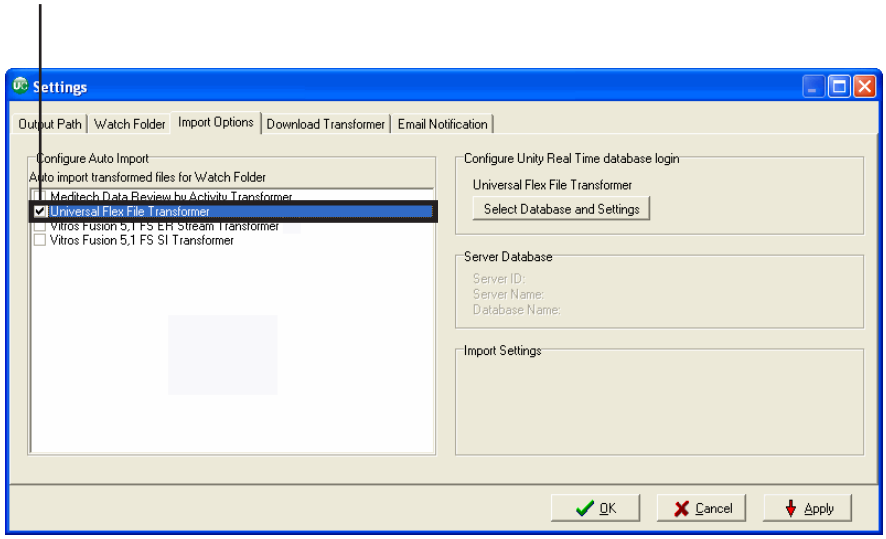
Configuring Automatic Import

Important: Make sure you configure a Watch Folder before configuring automatic import. See "Configuring a Watch Folder" on page 64 for more information.

1 Click the **Import Options** tab.



2 Select the check box for the transformer you want to set up for automatic importing.



3 Click the appropriate button:

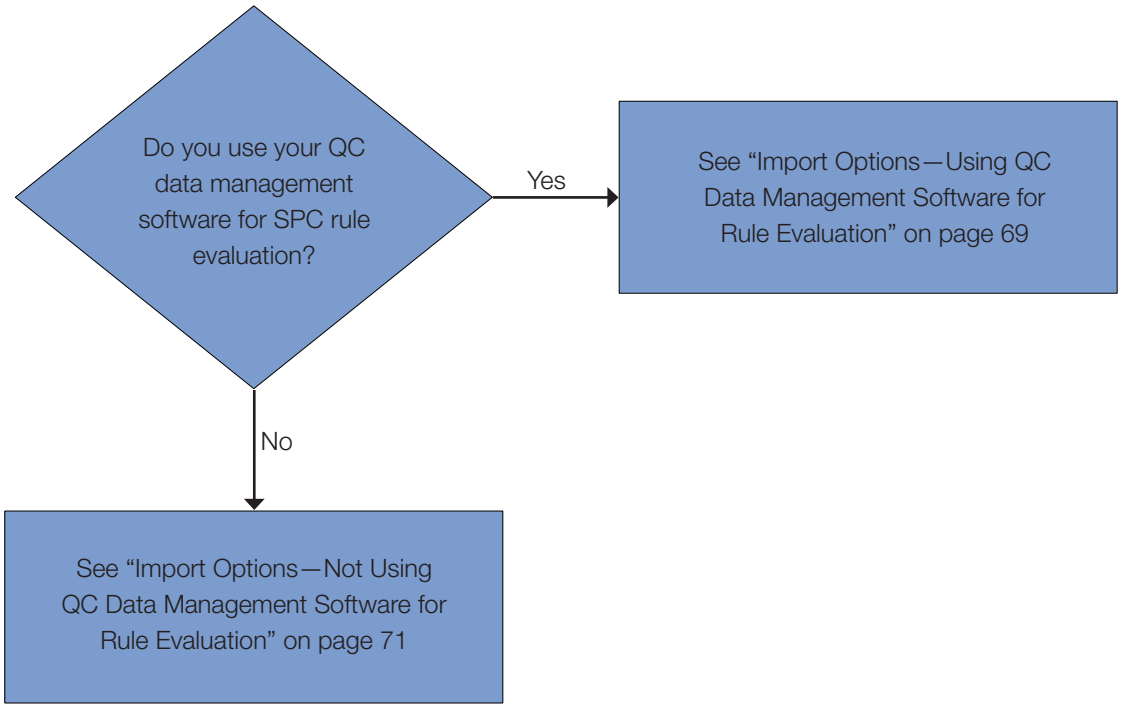
- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without closing the Settings dialog box. This is convenient if you want to continue configuring settings on other tabs.

Configuring Import Options

Transformed QC data is imported into your QC data management software based on the import options defined in UnityConnect. Select import options based on your use of your QC data management software for SPC rule evaluation.

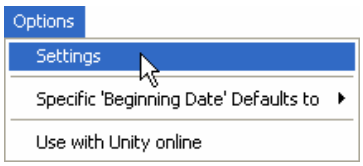
Note: The import options only need to be configured one time. You do not need to configure the settings each time you transform data.

Use the import options described in the appropriate section according to how you use your QC data management software for SPC rule evaluation.

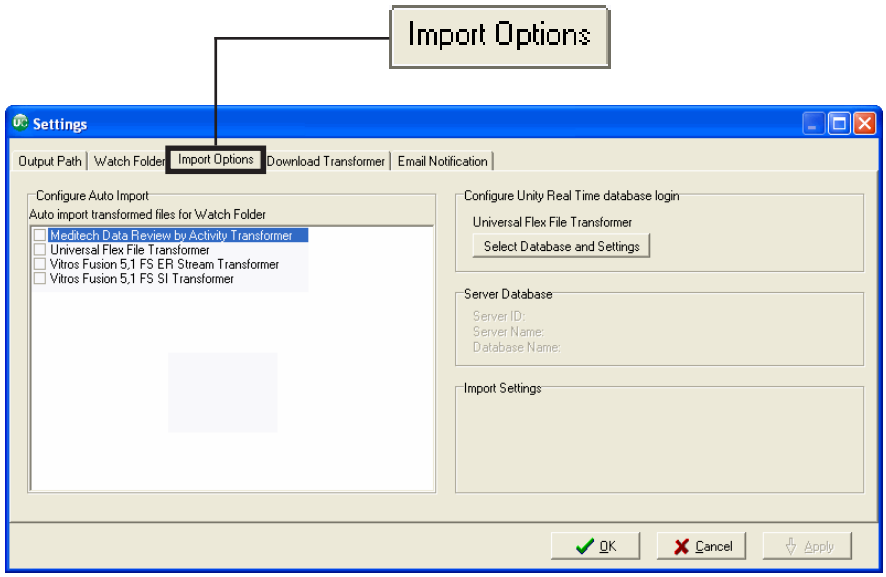


Import Options—Using QC Data Management Software for SPC Rule Evaluation

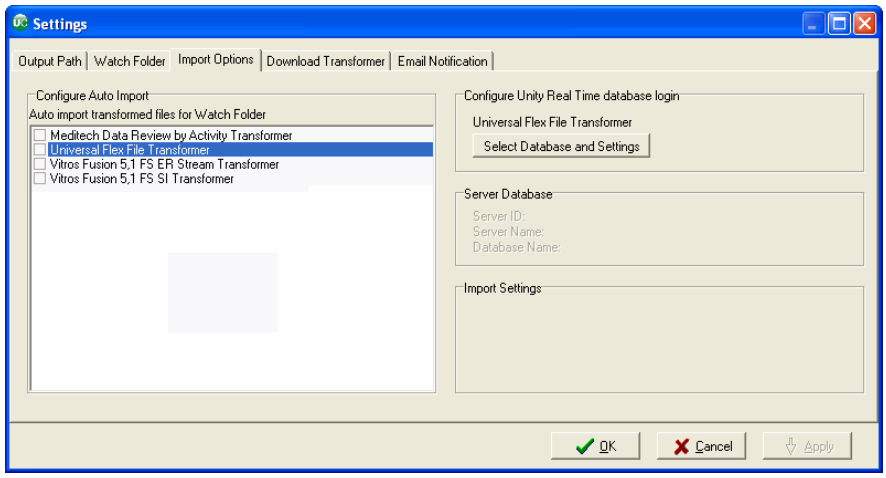
1 Click the **Options** menu and then click **Settings**.



2 Click the **Import Options** tab.

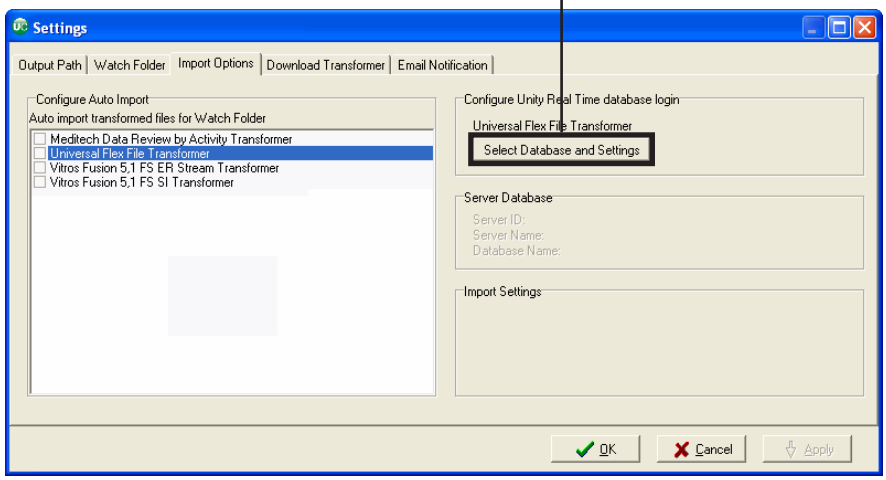


3 Select the transformer for which you want to configure import options.



Note: Do not select the check box for the transformer unless you want to set up automatic import. See "Configuring Automatic Import" on page 67 for more information.

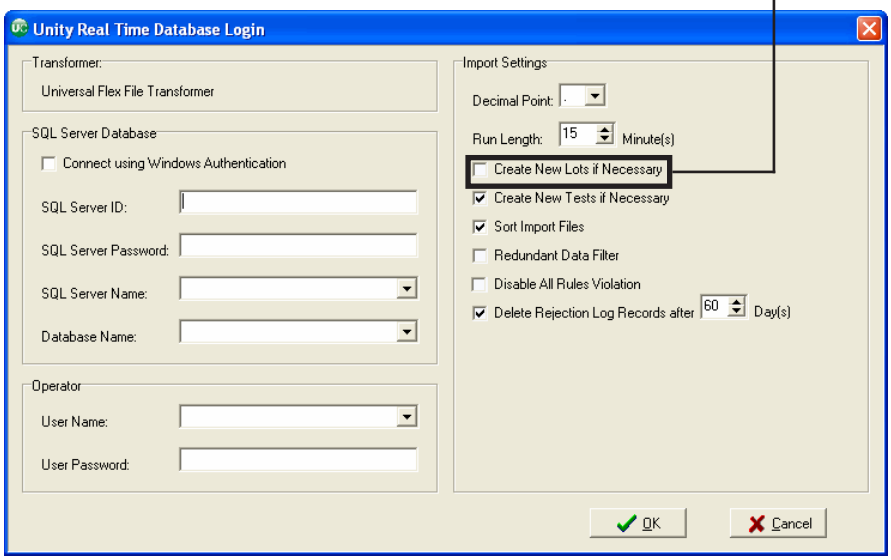
4 Click Select Database and Settings .



5 Make sure the **Create New Lots if Necessary** check box is not selected.

The following illustration shows recommended import settings for customers using their QC data management software for SPC rule evaluation.

The **Create New Lots if Necessary** check box is not selected.



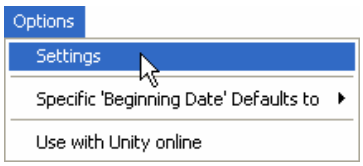
This ensures UnityConnect will not create news lots when transforming and overwrite your current SPC rule settings in your QC data management software.

6 Click OK.

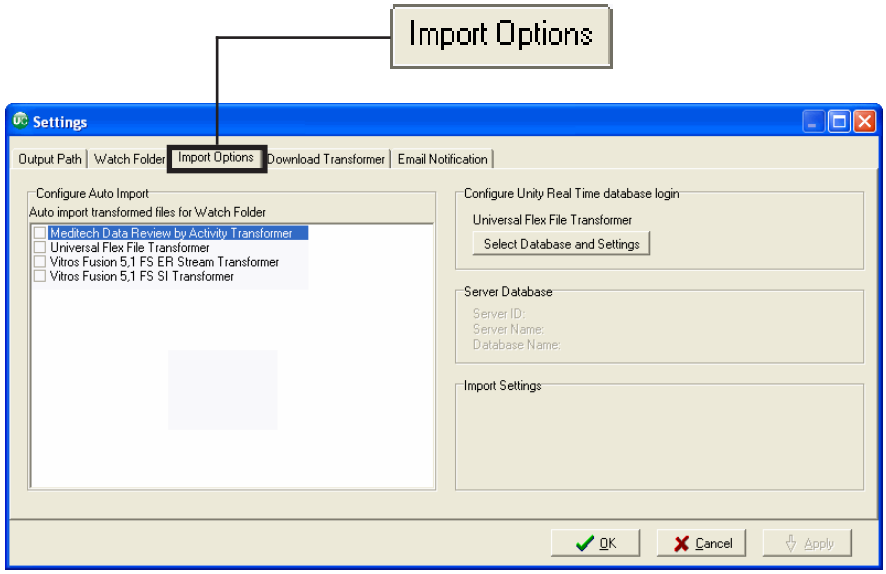
To duplicate your current SPC rule settings from the current lot to the new lot, leave the **Create New Lots if Necessary** check box blank and duplicate the lot in your QC data management software before transforming data for the lot for the first time. See “Configuring a New Lot” on page 164 for more information.

Import Options—Not Using QC Data Management Software for SPC Rule Evaluation

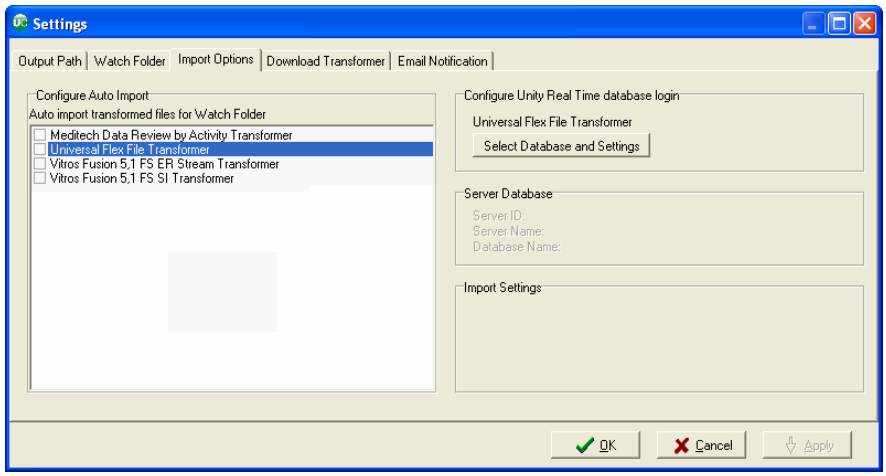
1 Click the **Options** menu and then click **Settings**.



2 Click the **Import Options** tab.

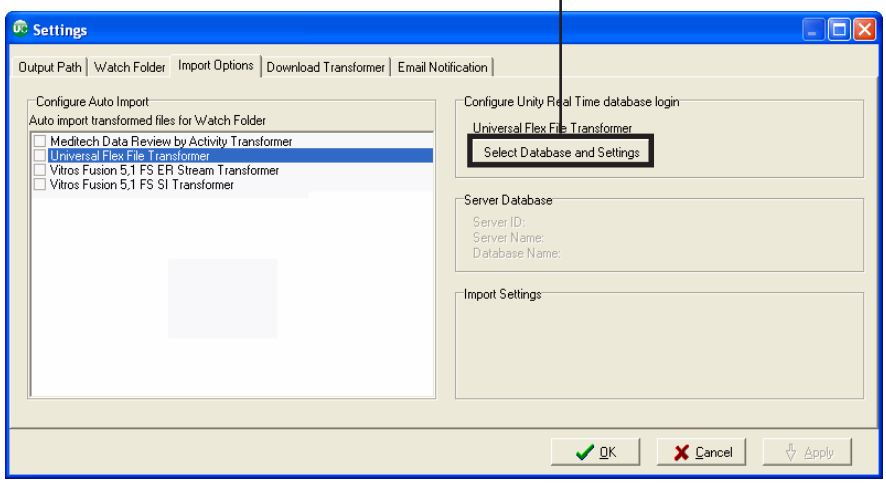


3 Select the transformer for which you want to configure import options.



Important: Do not select the check box for the transformer unless you want to set up automatic import. See “Configuring Automatic Import” on page 67 for more information.

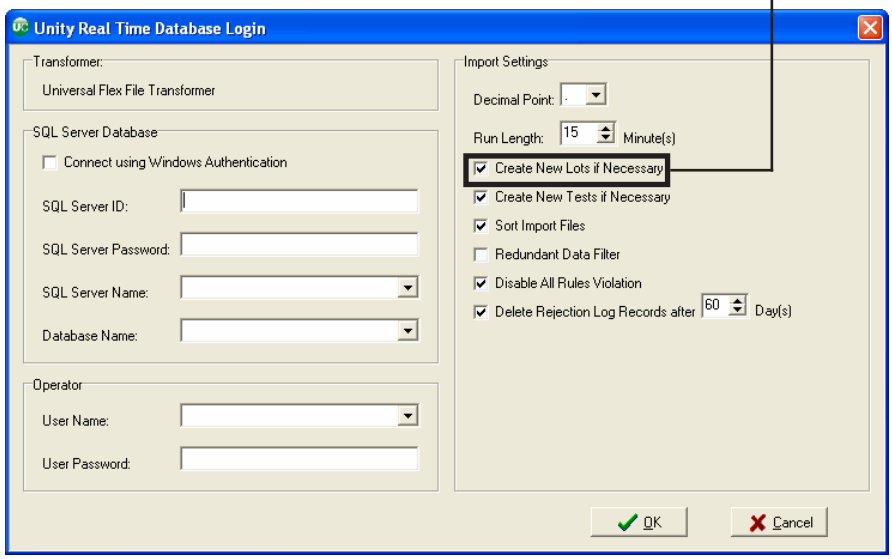
4 Click Select Database and Settings .



5 Make sure the **Create New Lots if Necessary** check box is selected.

The following illustration shows recommended import settings for customers not using their QC data management software for SPC rule evaluation.

Create New Lots if Necessary check box is selected.



6 Click OK .

A new lot is automatically created when UnityConnect finds a new lot in your QC data file.

Downloading a Transformer

There are many instrument, middleware, and LIS transformers available for UnityConnect that you can download and install via the Internet.

Important: Talk to your Bio-Rad representative for more information about licensing and downloading a transformer.

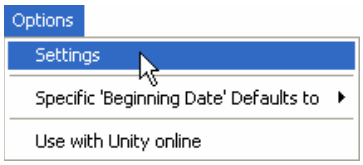
Configuring E-Mail Notification

UnityConnect has the ability to send e-mail notifications to one or more e-mail addresses when:

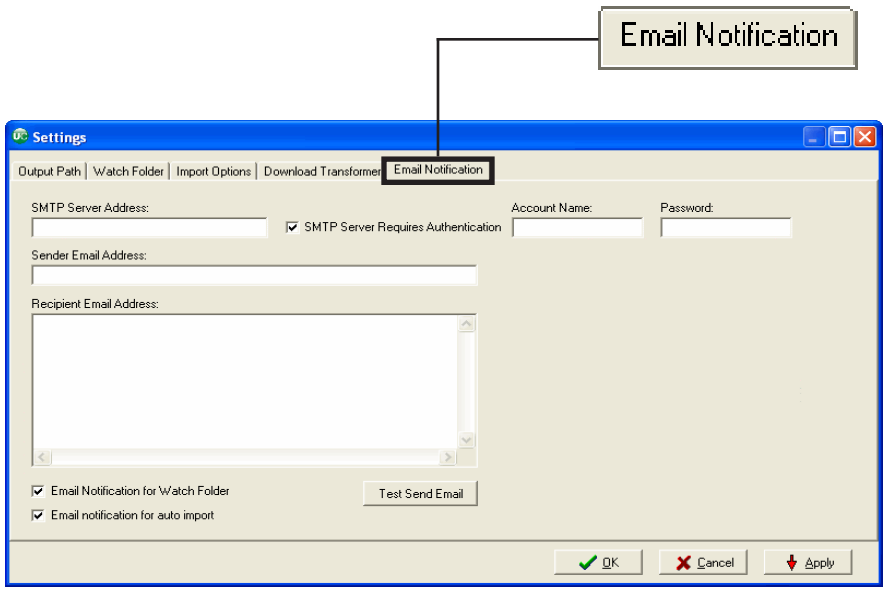
- There are QC data files requiring reprocessing.
- There is an error during automatic import.
- If a Rejection Log has been created in UnityConnect.

1 Start UnityConnect.

2 Point to the **Options menu** and then click **Settings**.



3 Click the **Email Notification** tab.



4 Type your SMTP server address in the **SMTP Server Address** field.

5 Select the **SMTP Server Requires Authentication** check box if your server requires authentication to send e-mail messages.

6 Type the account name in the **Account Name** field if you selected the **SMTP Server Requires Authentication** check box.

7 Type the password in the Password field if you selected the **SMTP Server Requires Authentication** check box.

8 Type a sender e-mail address in the **Sender Email Address** field.

Tip: This helps prevent the sender e-mail address from being filtered as spam by your e-mail server.

9 Type each e-mail address you want to receive notification in the **Recipient Email Address** field. Type each e-mail address on a separate line.

10 Click Test Send Email to test the e-mail settings.

A test e-mail is sent to each recipient.

11 Select the **Email Notification for Watch Folder** check box if you want recipients to receive an e-mail when there is a file waiting for reprocessing.

12 Select the **Email notification for auto import** if you want recipients to receive an e-mail when an error or rejection occurs during import.

13 Click the appropriate button:

- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without closing the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

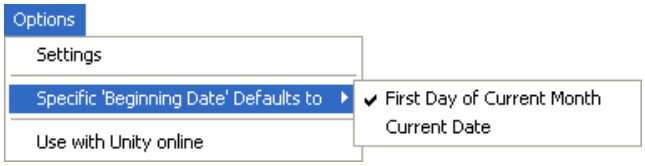
Configuring the Default Date Settings

You can customize the default beginning date for the QC data file to transform. The beginning date you select is automatically set each time you open UnityConnect to transform your QC data file.

Note: You can always manually change the date range for the QC data file to transform. QC data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.

Click the **Options** menu, point to **Specific Beginning Date Defaults to**, and then click the option you want:

- **First Day of Current Month**
- **Current Date**



CHAPTER 4

Configuring UnityConnect for Data File Transfer with Web-based Software

In This Chapter

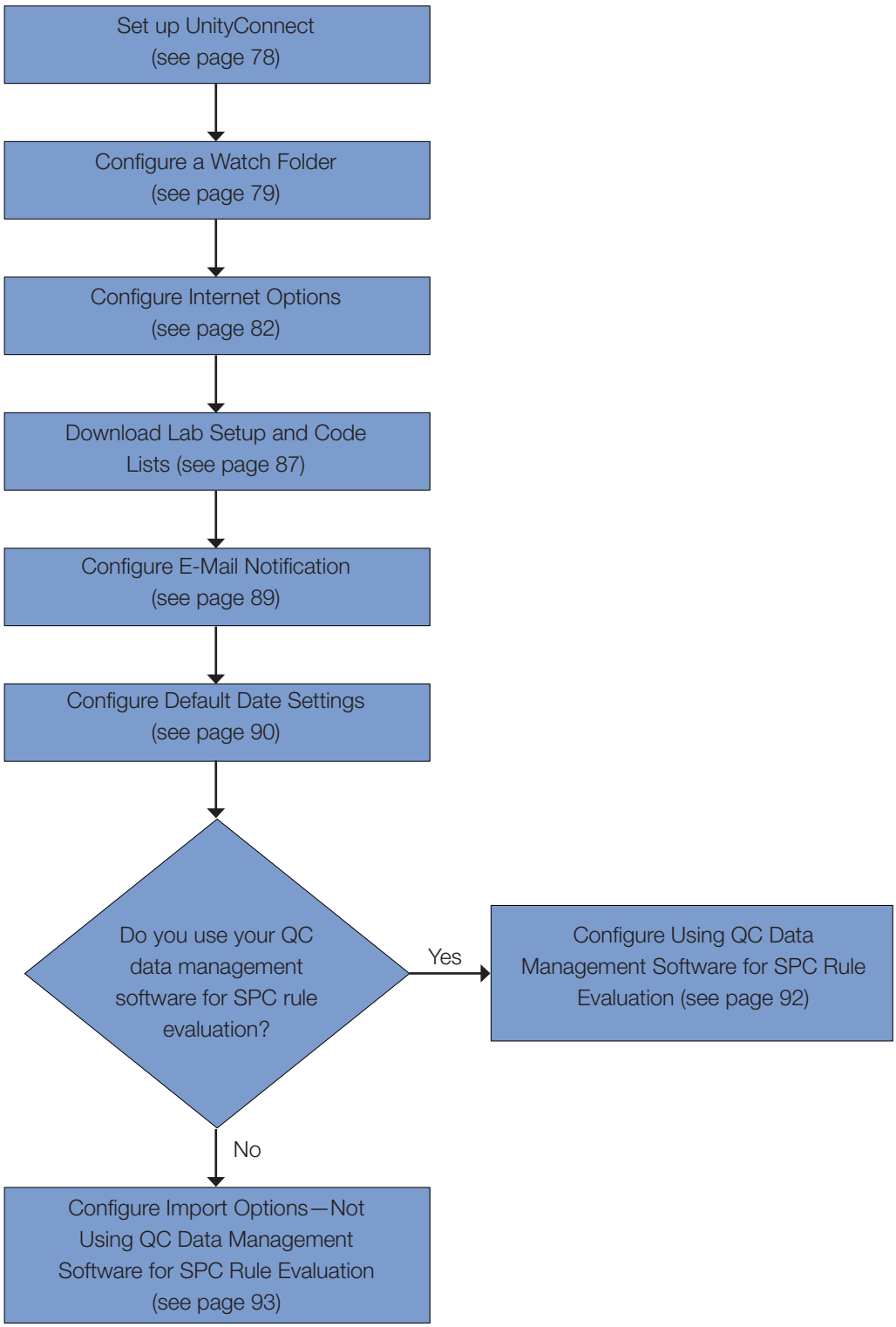
Before You Begin

This chapter is only for customers using UnityConnect with the **data file transfer method** and any of the following **desktop** software:

UnityWeb

Unity Real Time online

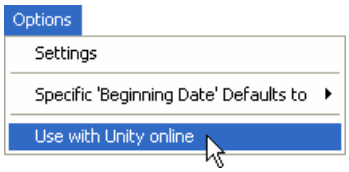
Configuration Flow Chart



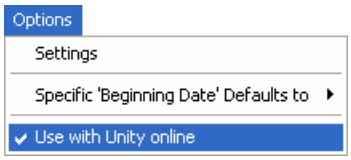
Setting Up UnityConnect with Web-based Software

1 Start UnityConnect.

2 Click the **Options** menu and then click **Use with Unity online**.



A check mark appears to the left indicating the **Use with Unity online** option is selected.



Output Path

Each installed and licensed transformer in UnityConnect requires an output path. The output path is the location where your transformed QC data file is stored.

In most instances, the output path is the same location for all transformers. However, depending on your laboratory set up, multiple output paths may be useful. For example, if your laboratory uses multiple transformers, it is useful to have a separate output path for each transformer. Consult Bio-Rad for more information.

Important: The output path is pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, do not change the output path. Talk to your Bio-Rad representative for more information about output paths.

Configuring a Watch Folder

UnityConnect can be configured to “watch” for data entering a “Watch Folder.”

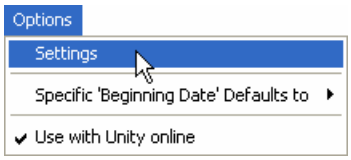
1 Create a new folder on the computer desktop where UnityConnect is installed.

2 Name the folder “Watch Folder.”

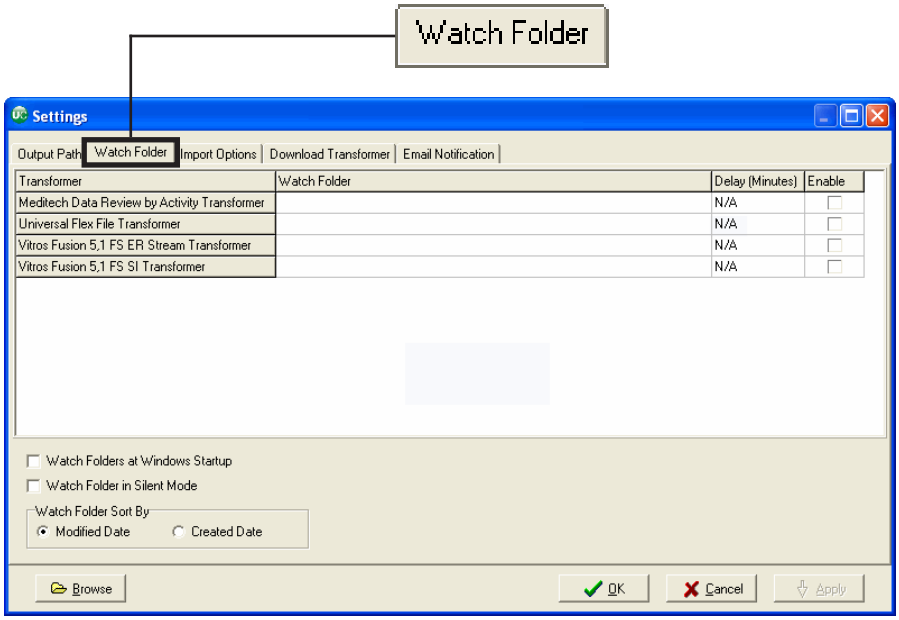
> **Note**: A Watch Folder must be created for each transformer. Give each Watch Folder a unique name if you create more than one Watch Folder. For example, “Watch Folder Meditech” and “Watch Folder RXL.” This helps easily identify the Watch Folder for each transformer.

3 Start UnityConnect.

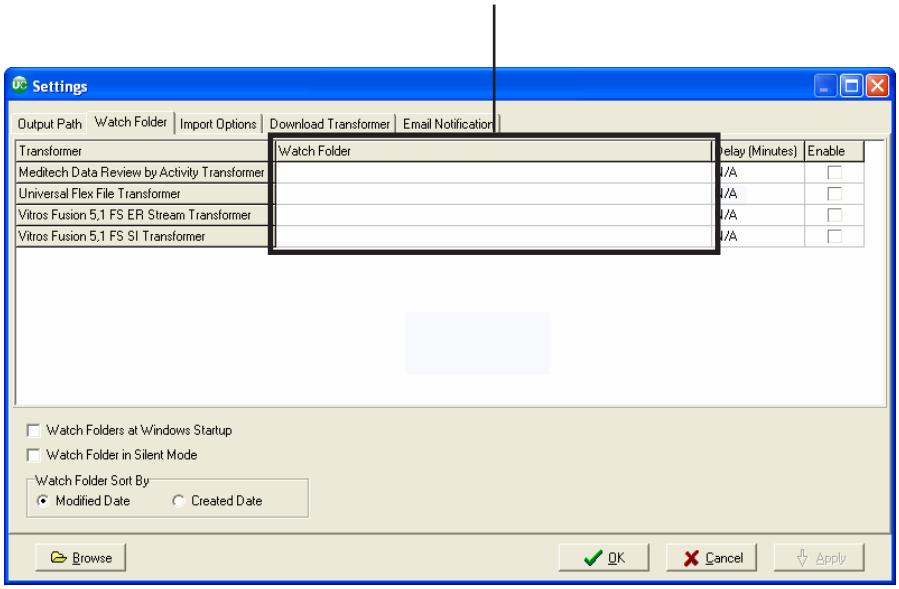
4 Click the **Options** menu and then click **Settings**.



5 Click the **Watch Folder** tab.



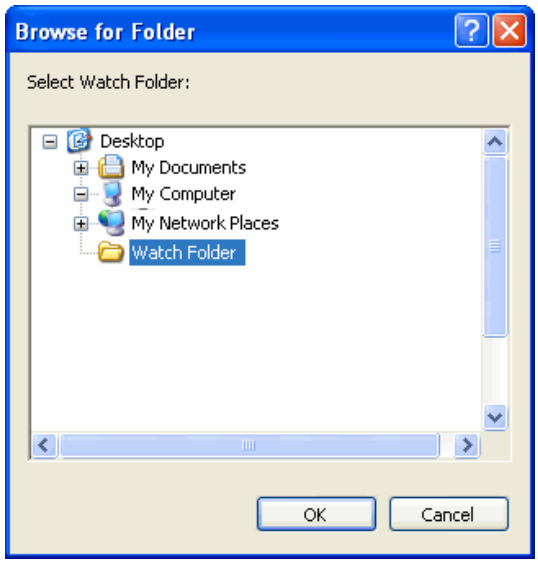
6 Click in the Watch Folder field for the transformer you want to configure.

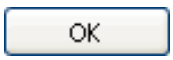


7 Click 

.

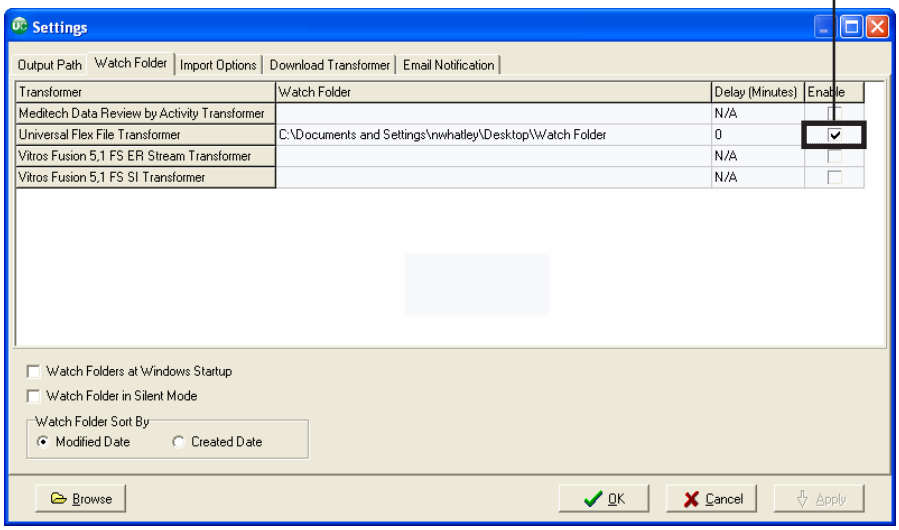
8 Select the Watch Folder you created on your computer desktop.



9 Click 

.

10 Select the Enable check box for the transformer.



11 Select the **Watch Folders at Windows Startup** check box if you want the Watch Folder to be active each time the computer starts up.

Note: You must click Watch on the UnityConnect main window to make the Watch Folder active if you do not select the **Watch Folders at Windows Startup** check box.

12 Select the **Watch Folder in Silent Mode** check box if you want the Watch Folder to run in silent mode.

Note: Silent mode processes all data in the QC data file that UnityConnect recognizes (that is, all data that has been configured in UnityConnect). If UnityConnect does not recognize any item(s) in the QC data file, a copy of the original QC data is saved for later reprocessing when the unrecognized item(s) can be configured. UnityConnect can also be configured to send an e-mail notification when there are QC data files requiring reprocessing. See “Configuring E-Mail Notification” on page 89 for more information.

13 Select a **Watch Folder Sort By** option:

- **Modified Date**
- **Created Date**

14 Click the appropriate button:

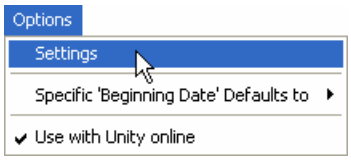
- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings and leave the **Settings** dialog box option. This is convenient if you want to continue configuring settings on other tabs.

Configuring Internet Options

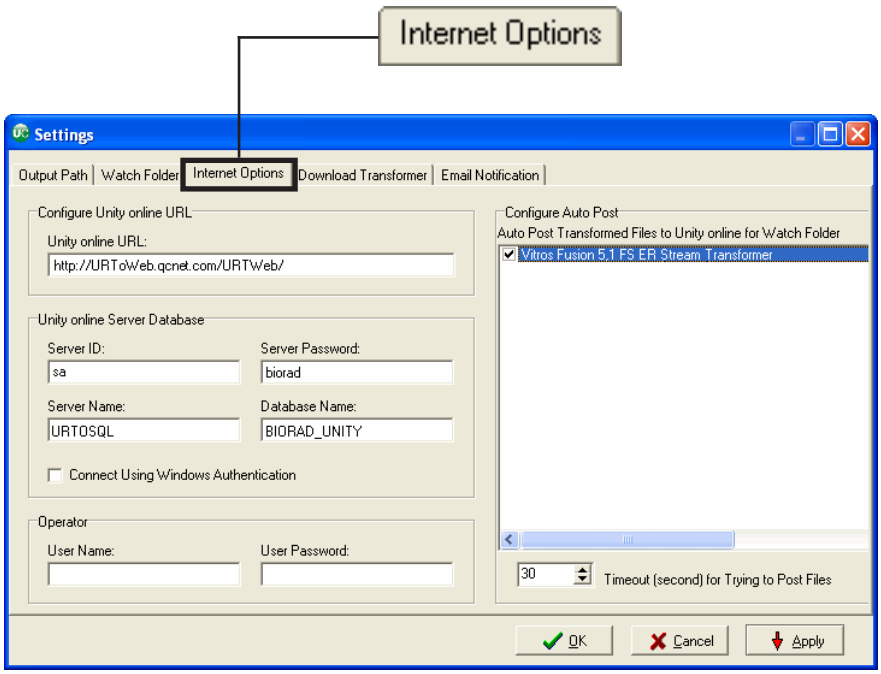
Important: The Internet options are pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, talk to your Bio-Rad representative if you need further assistance configuring Internet options.

1 Start UnityConnect.

2 Click the **Options** menu and then click **Settings**.



3 Click the **Internet Options** tab.



4 Verify the settings in the following fields:

Field	Setting
Unity online URL:	http://URToWeb.qcnet.com/URTWeb/
Server ID:	sa
Server Password:	biorad
Server Name:	URTOSQL
Database Name:	BIORAD_UNITY

Note: The settings shown above are the suggested settings at the time of this publication.

5 Type the user name you use when logging on to Unity Real Time online or UnityWeb 2.0 in the **User Name** field.

6 Type the password you use when logging on to Unity Real Time online or UnityWeb 2.0 in the **User Password** field.

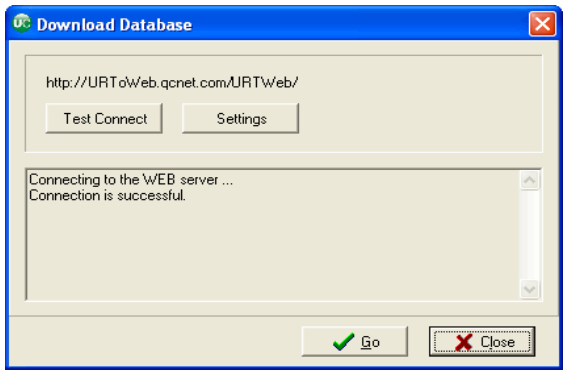
7 Click the appropriate button:

- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without leaving the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

Testing the Internet Connection

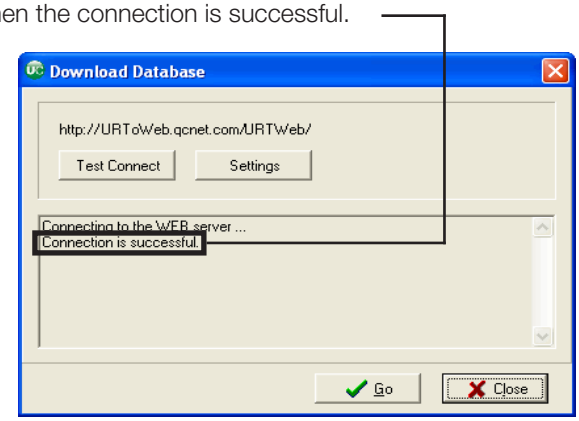
You can test the Internet connection after configuration to ensure the configuration is correct.

1 Click the **File** menu and then click **Download Database**.



2 Click Test Connect .

A message appears when the connection is successful.



3 Click Close .

If the Internet Connection Fails

1 Click Settings .

2 Review the configuration and make any changes as required.

3 Repeat the testing as described on the previous page.

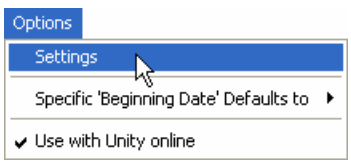
4 Contact Bio-Rad Software Support for assistance if the testing continues to fail.

Configuring Auto Post

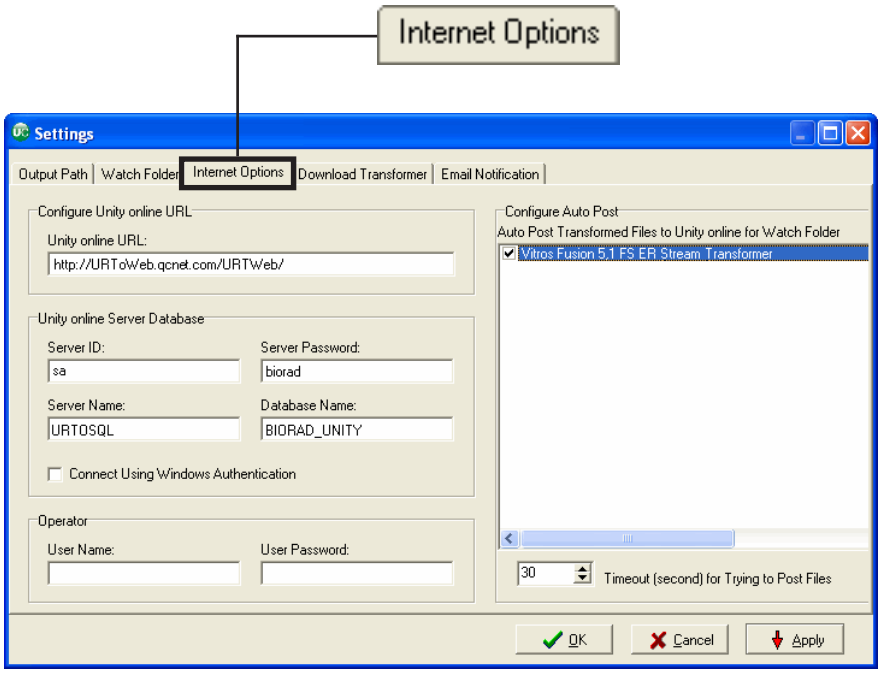
Note: Auto post automatically uploads your transformed QC data to Unity Real Time online or UnityWeb 2.0.

1 Start UnityConnect.

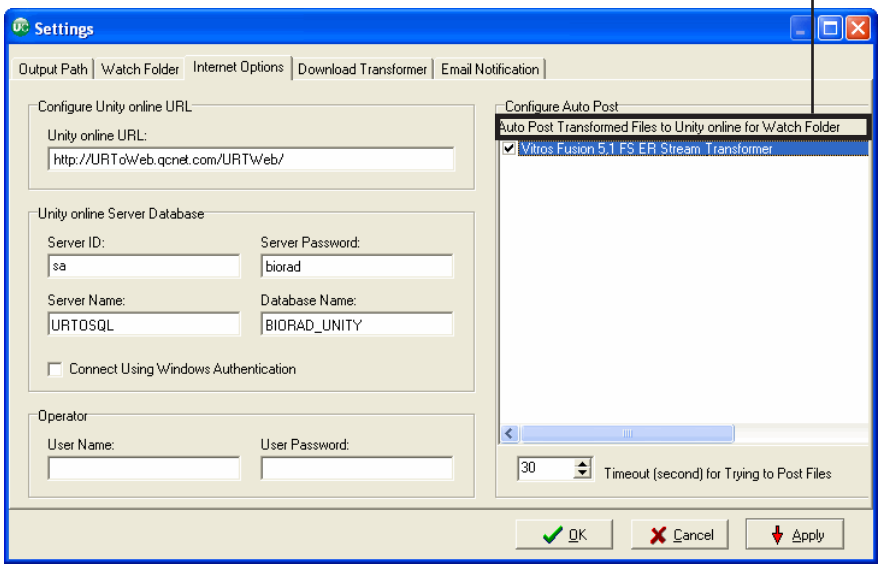
2 Click the **Options** menu and then click **Settings**.



3 Click the **Internet Options** tab.



4 Select the check box for the transformer you want to configure for auto post.



Note: The settings shown in the example above are the suggested settings at the time of this publication.

5 Type the user name you use when logging on to Unity Real Time online in the **User Name** field.

6 Type the password you use when logging on to Unity Real Time online in the **User Password** field.

7 Click the appropriate button:

- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without leaving the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

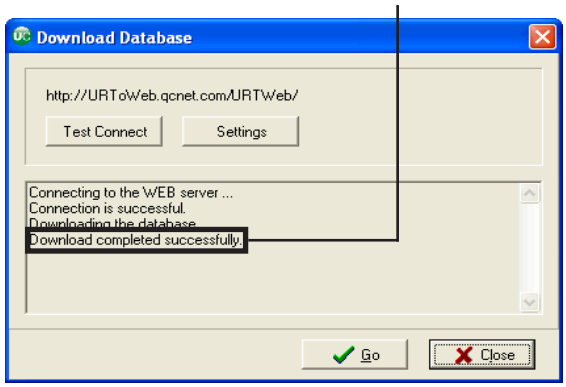
Downloading the Database

Note: The database only needs to be download one time. See "Downloading Lab Setup and Code Lists" on page 87 for information about keeping the database up-to-date.

1 Click the **File** menu and then click **Download Database**.

2 Click Go.

A message appears when the download completes 3 successfully.

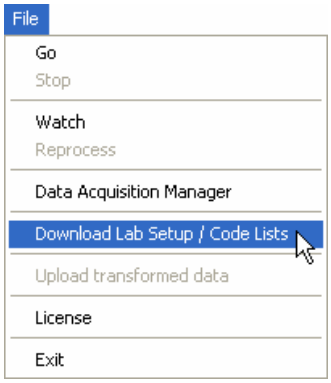


3 Click Close.

Downloading Lab Setup and Code Lists

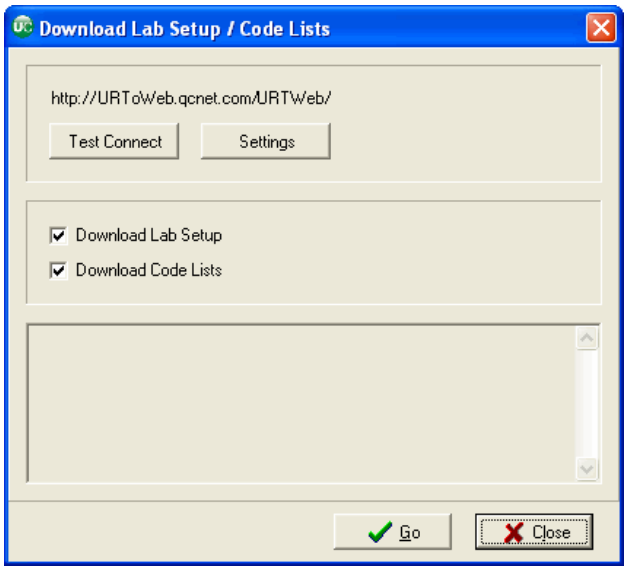
Important: Perform the steps in this section any time you make a configuration change to your UnityWeb 2.0 or Unity Real Time online software. In addition, Bio-Rad recommends performing these steps at least monthly to ensure your software always has the most up-to-date codes lists and other information.

1 Click the **File** menu and then click **Download Lab Setup/Code Lists**.



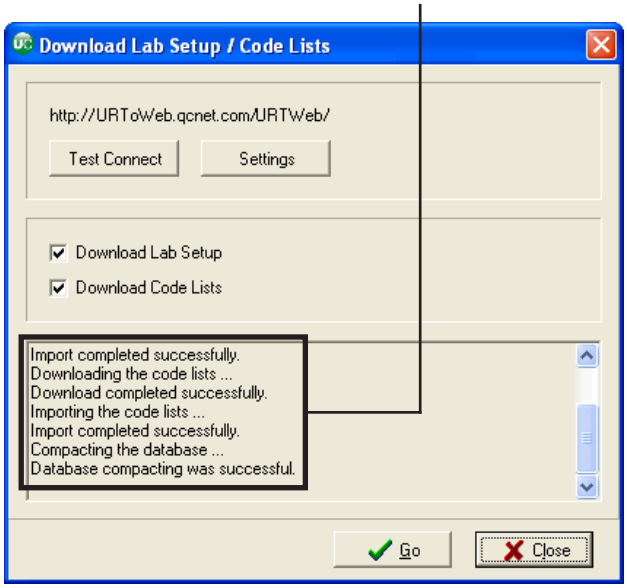
2 Select the check box for each item you want to download:

- **Download Lab Setup**
- **Download Code Lists**



3 Click Go .

A message appears when the download completes successfully.



4 Click Close .

Downloading a Transformer

There are many instrument, middleware, and LIS transformers available for UnityConnect that you can download and install via the Internet.

Important: Talk to your Bio-Rad representative for more information about licensing and downloading a transformer.

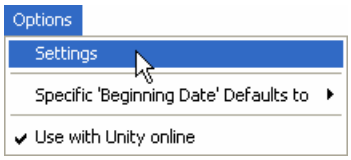
Configuring E-Mail Notification

UnityConnect has the ability to send e-mail notifications to one or more e-mail addresses when:

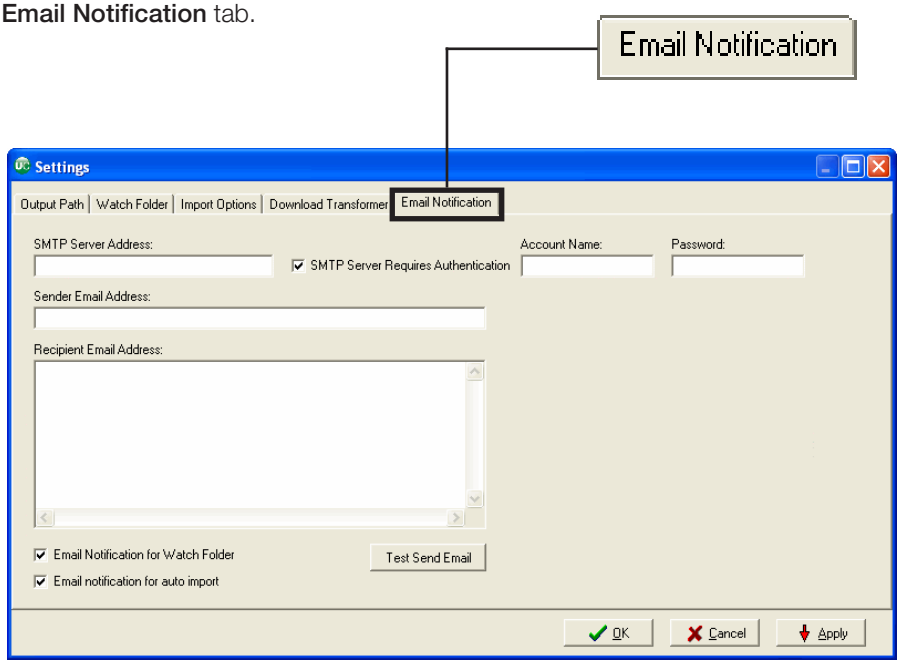
- There are QC data files requiring reprocessing.
- There is an error during automatic upload.
- If a Rejection Log has been created in UnityConnect.

1 Start UnityConnect.

2 Point to the **Options** menu and then click **Settings**.



3 Click the **Email Notification** tab.



4 Type your SMTP server address in the **SMTP Server Address** field.

5 Select the **SMTP Server Requires Authentication** check box if your server requires authentication to send e-mail messages.

6 Type the account name in the **Account Name** field if you selected the **SMTP Server Requires Authentication** check box.

7 Type the password in the **Password** field if you selected the **SMTP Server Requires Authentication** check box.

8 Type a sender e-mail address in the **Sender Email Address** field.

> **Tip**: This helps prevent the sender e-mail address from being filtered as spam by your e-mail server.

9 Type each e-mail address you want to receive notification in the **Recipient Email Address** field. Type each e-mail address on a separate line.

10 Click Test Send Email to test the e-mail settings.

A test e-mail is sent to each recipient.

11 Select the **Email Notification for Watch Folder** check box if you want recipients to receive an e-mail when a file is waiting for reprocessing.

12 Select the **Email Notification for Auto Post** if you want recipients to receive an e-mail when an error has occurred during auto-post.

13 Click the appropriate button:

- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings and leave the **Settings** dialog box option. This is convenient if you want to continue configuring settings on other tabs.

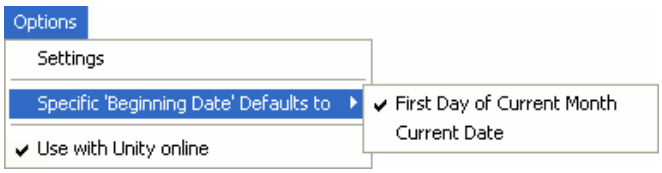
Configuring the Default Date Settings

You can customize the default beginning date for the QC data file to transform. The beginning date you select is automatically set each time you open UnityConnect to transform your QC data file.

> **Note**: You can always manually change the date range for the QC data file to transform. QC data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.

Click the **Options** menu, point to **Specific Beginning Date Defaults to**, and then click the option you want:

- First Day of Current Month
- Current Date

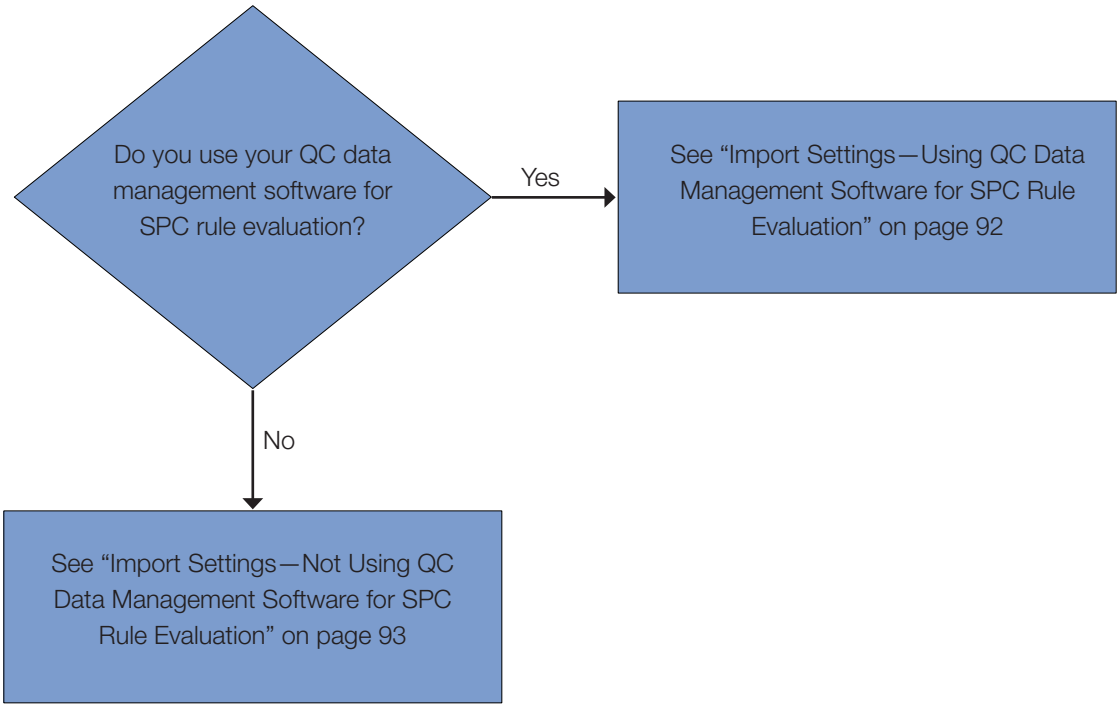


Configuring Import Settings

Transformed QC data is imported into your QC data management software based on the import settings defined in the software. Select import settings based on your use of your QC data management software for SPC rule evaluation.

Note: The import settings only need to be configured one time. You do not need to configure the settings each time you transform data.

Use the import settings described in the appropriate section according to how you use your QC data management software for SPC rule evaluation.



Import Settings—Using QC Data Management Software for SPC Evaluation

These settings ensure UnityConnect will not create new lots when transforming and overwrite your current SPC rule settings in your QC data management software.

To duplicate your current SPC rule settings from the current lot to the new lot, leave the **Create new Lots** check box blank and duplicate the lot in your QC data management software before transforming data for the lot for the first time. See “Configuring a New Lot” on page 164 for more information.

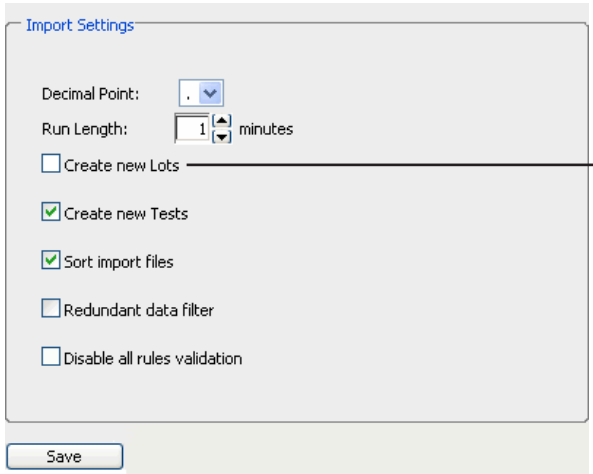
1 Log in to the UnityWeb 2.0 or Unity Real Time online software.

2 Click the **Tools** tab.

3 Click **Utilities**.

4 Click **Import Settings**.

The following illustration shows recommended import settings for customers using UnityWeb 2.0 or Unity Real Time online for SPC rule evaluation.



Import Settings—Not Using QC Data Management Software for SPC Rule Evaluation

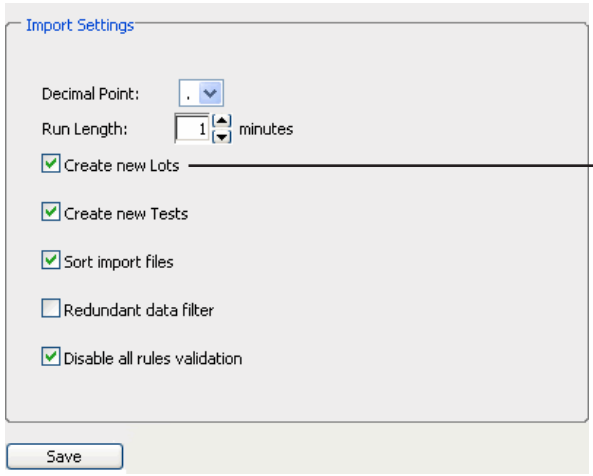
1 Log in to the UnityWeb 2.0 or Unity Real Time online software.

2 Click the **Tools** tab.

3 Click **Utilities**.

4 Click **Import Settings**.

The following illustration shows recommended import settings for customers who do not use UnityWeb 2.0 or Unity Real Time online for SPC rule evaluation.



CHAPTER 5

Configuring UnityConnect for a Data Stream with Desktop Software

In This Chapter

Before You Begin

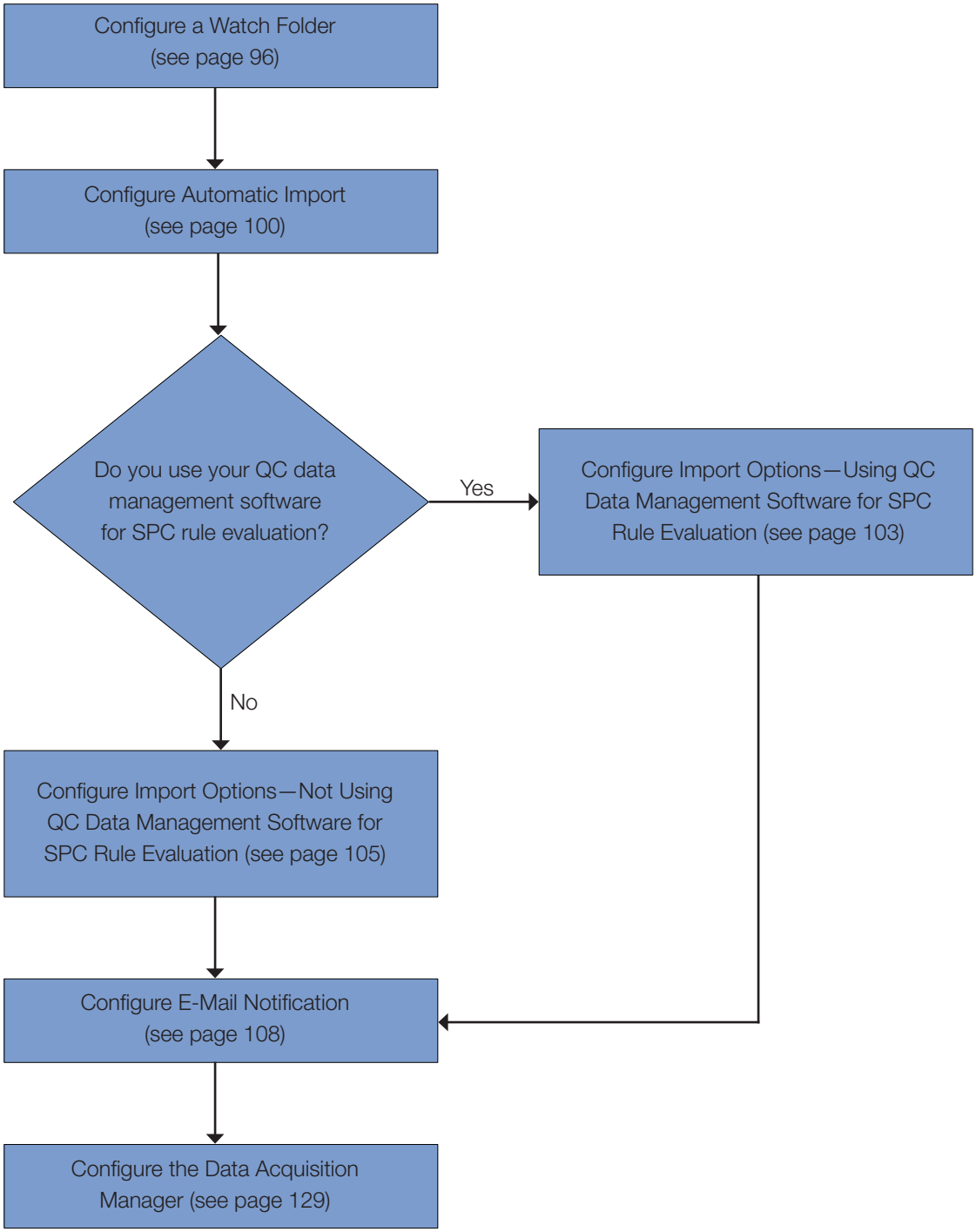
This chapter is only for customers using a **data stream** from an instrument, middleware, or LIS with UnityConnect and any of the following **desktop** software:

Unity Desktop

Unity Real Time

Configuration Flow Chart

Note: Installation, licensing, and downloading of one or more transformers is already completed by Bio-Rad.



Output Path

Each installed and licensed transformer in UnityConnect requires an output path. The output path is the location where your transformed QC data is stored.

In most instances, the output path is the same location for all transformers. However, depending on your laboratory set up, multiple output paths may be useful. For example, if your laboratory uses multiple transformers, it is useful to have a separate output path for each transformer.

Important: The output path is pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, do not change the output path. Talk to your Bio-Rad representative for more information about output paths.

Configuring a Watch Folder and Automatic Report

UnityConnect can be configured to "watch" for data entering a "Watch Folder" and automatically transform and import the data into your QC data management software.

Configuring a Watch Folder

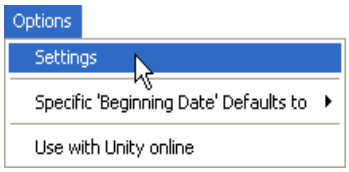
1 Create a new folder on the computer desktop where UnityConnect is installed.

2 Name the folder "Watch Folder."

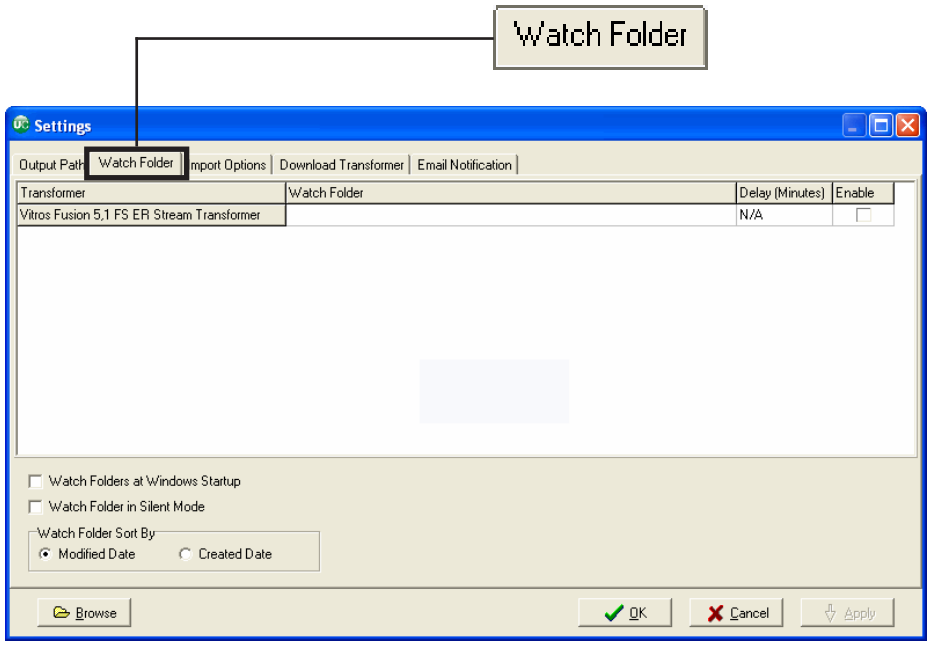
Note: A Watch Folder must be created for each transformer. Give each Watch Folder a unique name if you create more than one. For example, "Watch Folder Meditech" and "Watch Folder RXL." This helps easily identify the Watch Folder for each transformer.

3 Start UnityConnect.

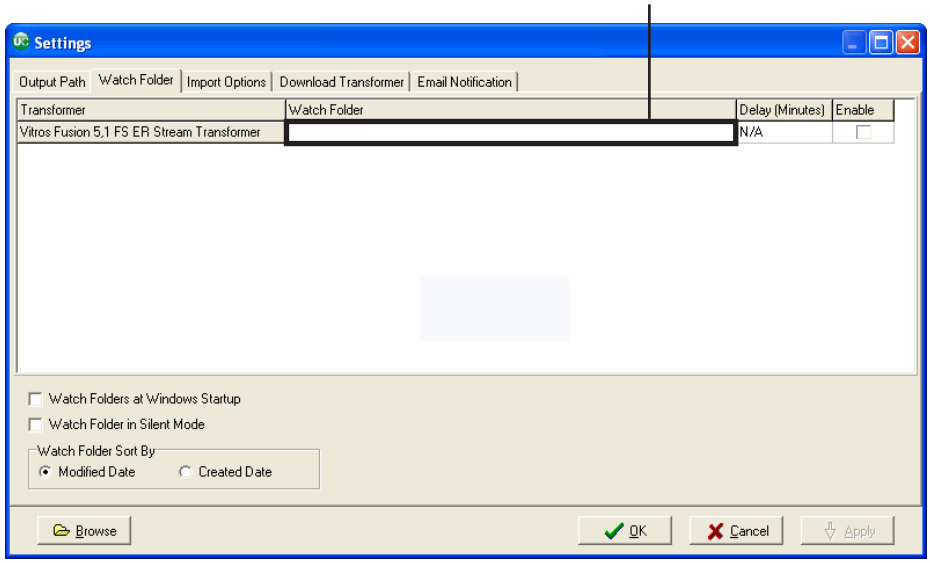
4 Click the **Options** menu and then click **Settings**.



5 Click the **Watch Folder** tab.



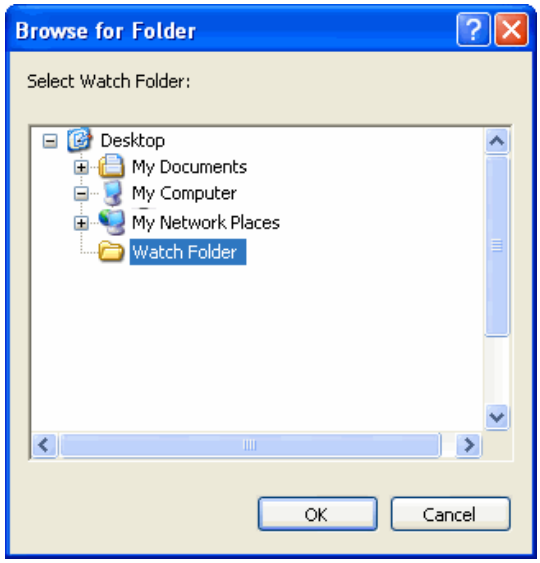
6 Click in the **Watch Folder** field for the transformer you want to configure.



7 Click 

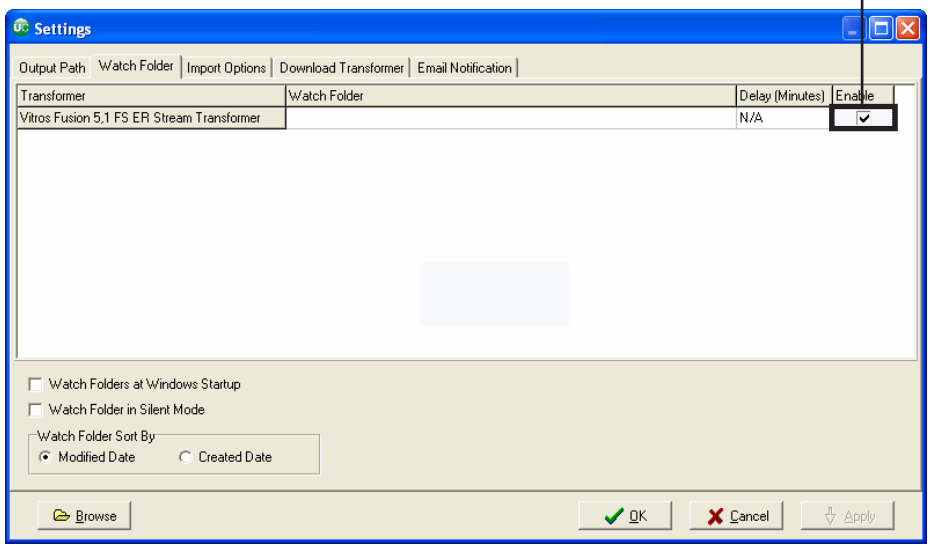
.

8 Select the Watch Folder you created on your computer desktop.

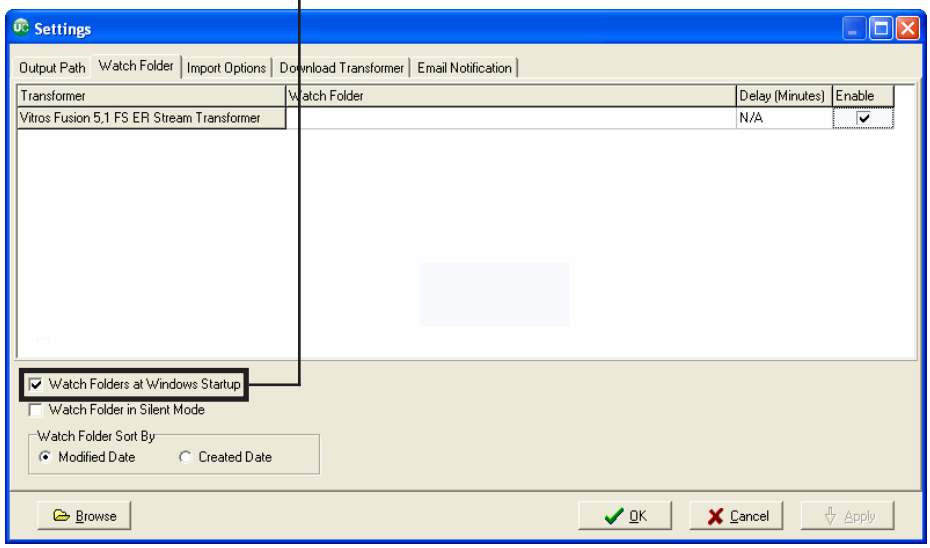


9 Click OK .

10 Select the **Enable** check box for the transformer.

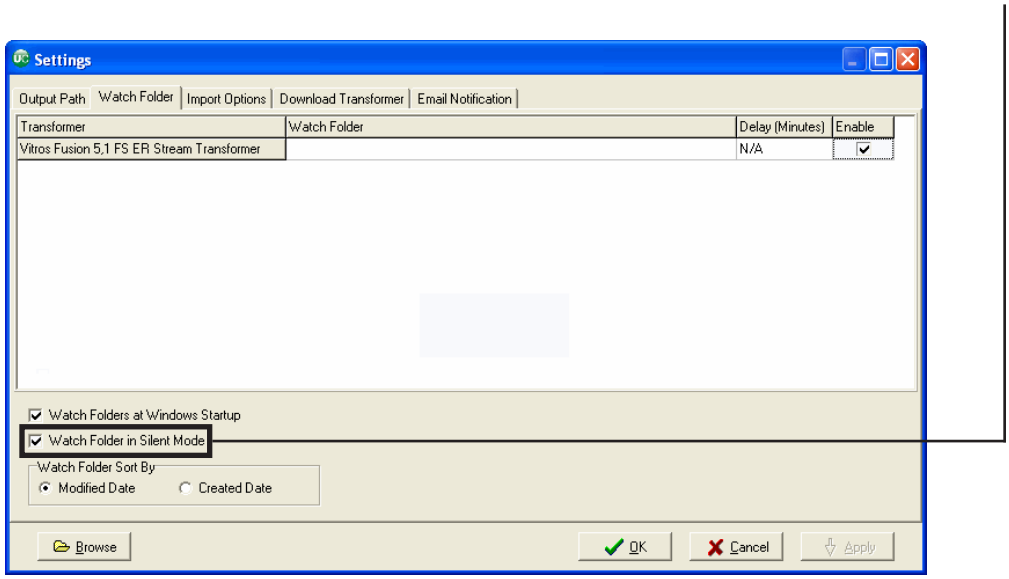


11 Select the **Watch Folders at Windows Startup** check box so the Watch Folder is active each time the computer starts.



Important: You must click Watch on the UnityConnect main window to make the Watch Folder active if you do not select the **Watch Folders at Windows Startup** check box.

12 Select the **Watch Folder in Silent Mode** check box if you want the Watch Folder to run in silent mode.



Note: Silent mode processes all data in the QC data stream that UnityConnect recognizes (that is, all data that has been configured in UnityConnect). If UnityConnect does not recognize any item(s) in the QC data stream, a copy of the original QC data is saved for later reprocessing when the unrecognized item(s) can be configured. UnityConnect can also be configured to send an e-mail notification when there is QC data requiring reprocessing. See “Configuring E-Mail Notification” on page 108 for more information.

13 Select a **Watch Folder Sort By** option:

- **Modified Date**
- **Created Date**

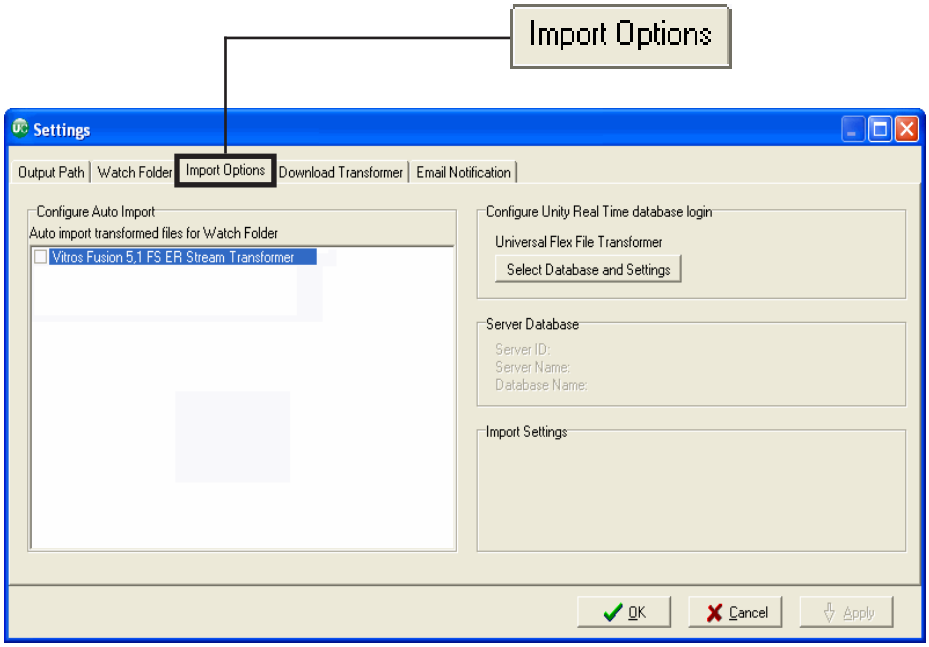
14 Click Apply .

15 Continue with the next section, “Configuring Automatic Import.”

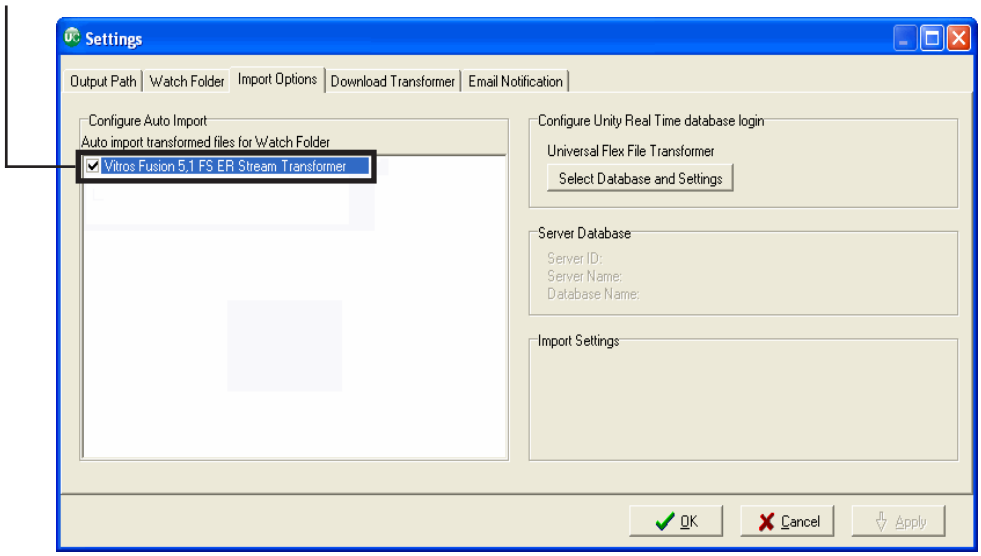
Configuring Automatic Import

Important: Make sure you configure a Watch Folder before configuring automatic import. See “Configuring a Watch Folder” on page 96 for more information.

1 Click the **Import Options** tab.



2 Select the check box for the transformer you want to set up for automatic importing.



3 Click the appropriate button:

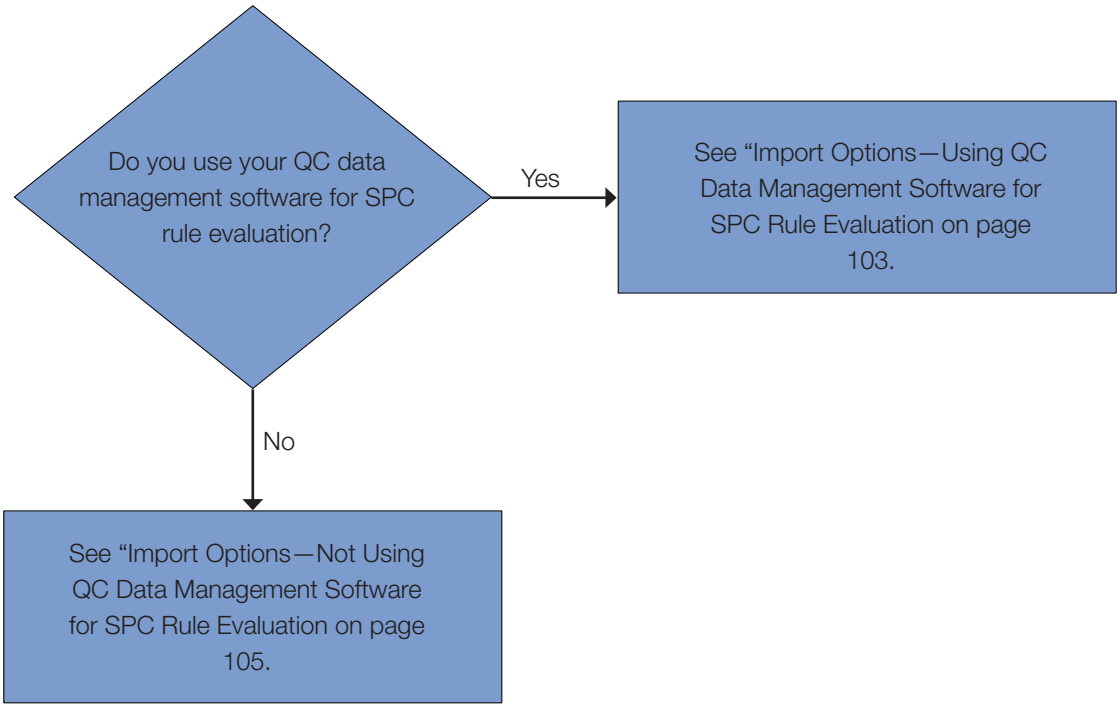
- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without closing the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

Configuring Import Options

Transformed QC data is imported into your QC data management software based on the import options defined in UnityConnect. Select import options based on your use of your QC data management software for SPC rule evaluation.

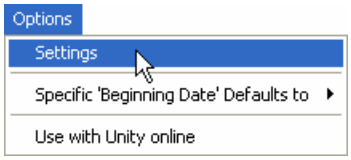
Note: The import options only need to be configured one time. You do not need to configure the settings each time you transform data.

Use the import options described in the appropriate section according to how you use your your QC data management software for SPC rule evaluation.

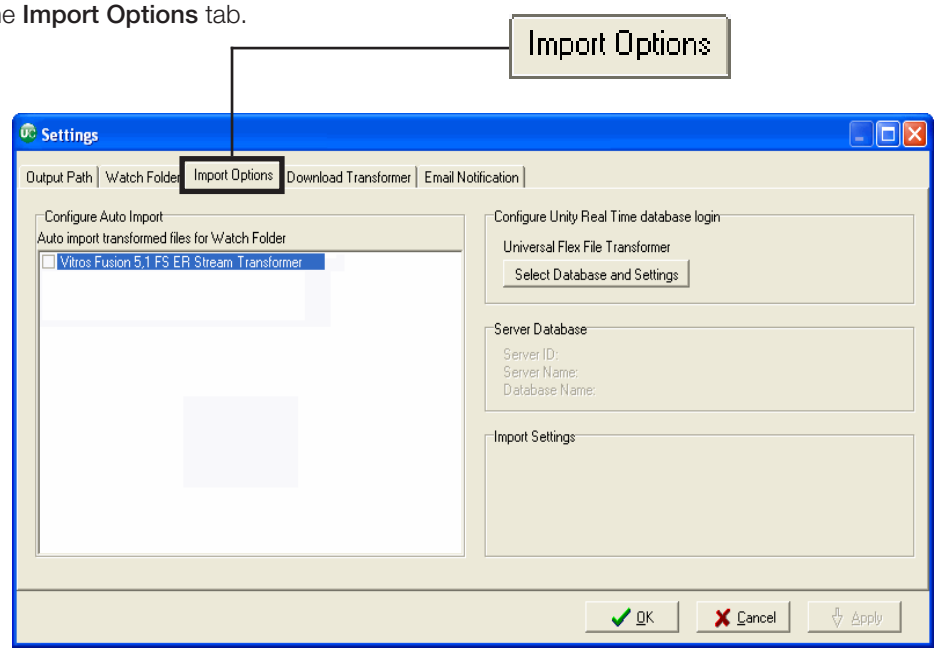


Import Options—Using QC Data Management Software for SPC Rule Evaluation

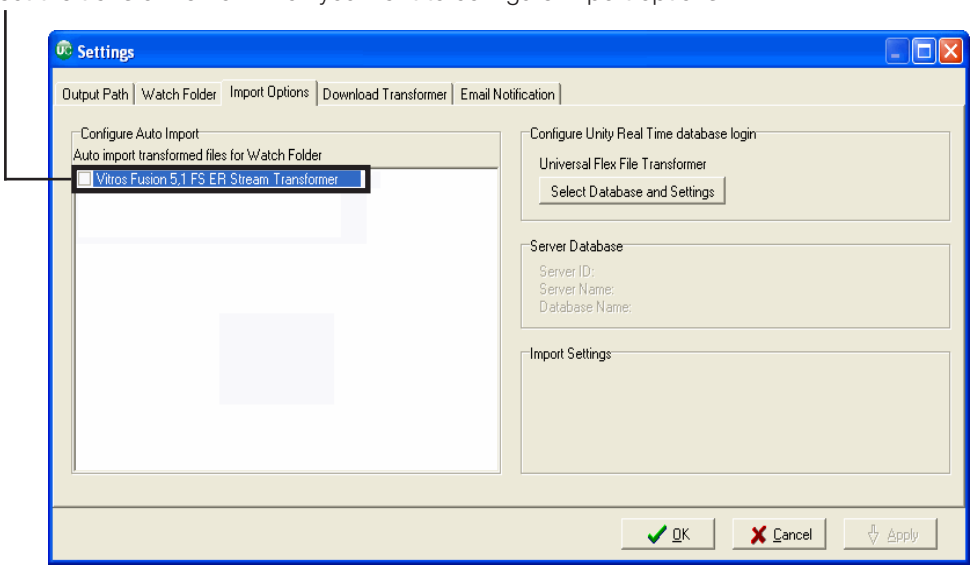
1 Click the **Options** menu and then click **Settings**.



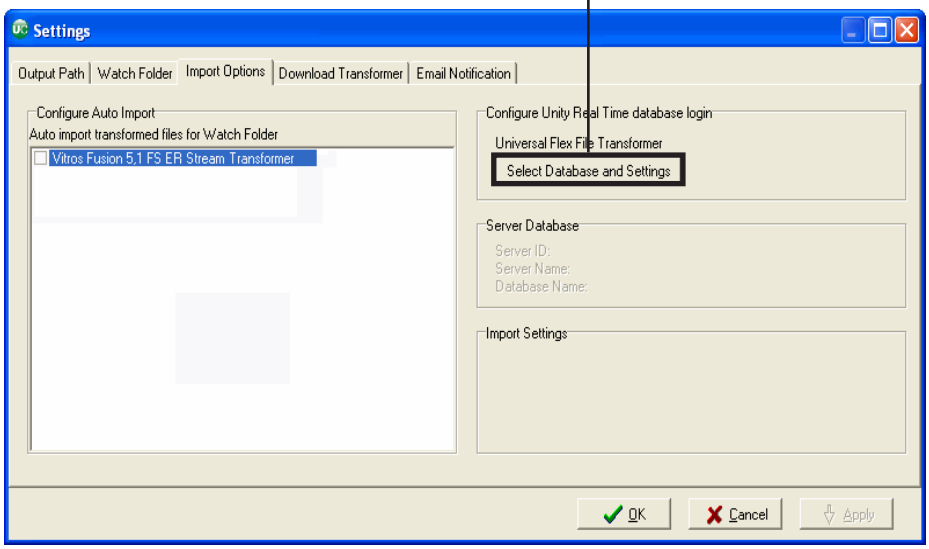
2 Click the **Import Options** tab.



3 Select the transformer for which you want to configure import options.



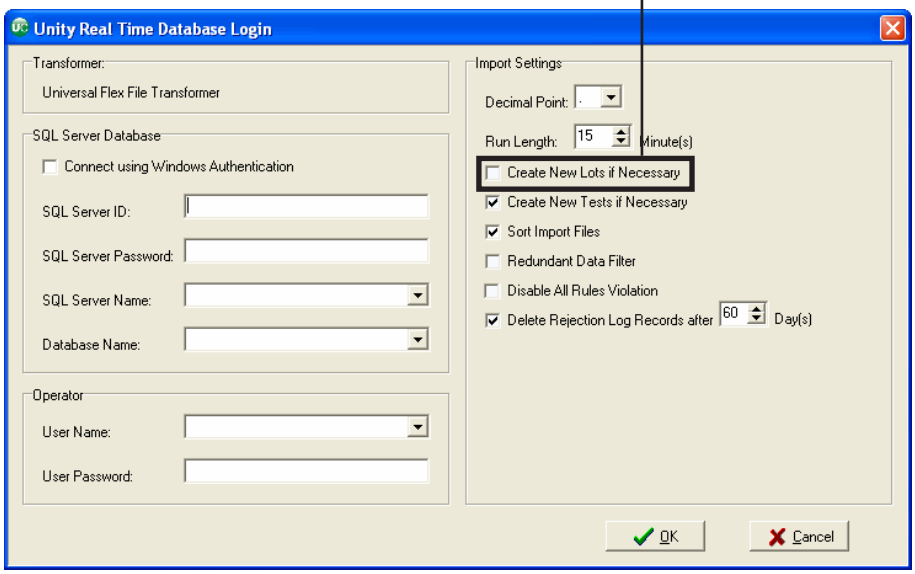
4 Click Select Database and Settings.



5 Make sure the **Create New Lots if Necessary** check box is not selected.

The following illustration shows recommended import settings for customers using their QC data management software for SPC rule evaluation.

The **Create New Lots if Necessary** check box is not selected.



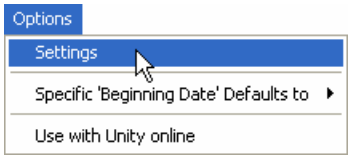
This ensures UnityConnect will not create news lots when transforming and overwrite your current SPC rule settings in your QC data management software.

6 Click OK .

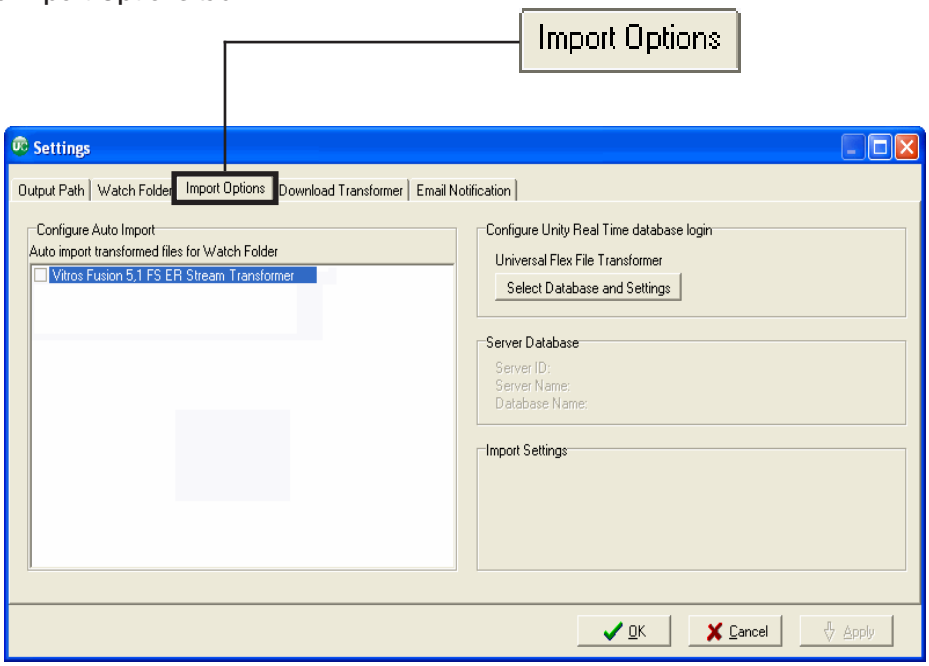
To duplicate your current SPC rule settings from the current lot to a new lot, duplicate the lot in your QC data management software before transforming data for the lot for the first time. See “Configuring a New Lot” on page 164 for more information.

Import Options—Not Using QC Data Management Software for SPC Rule Evaluation

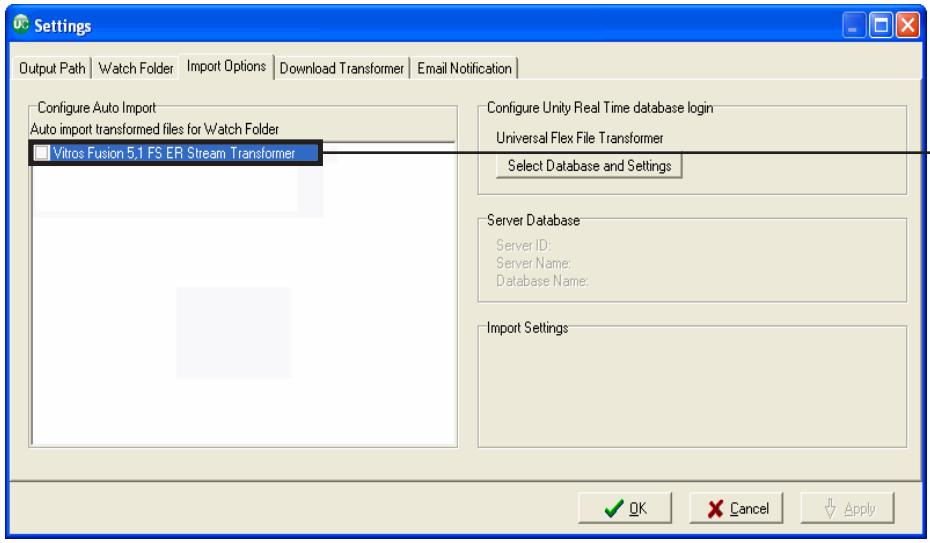
1 Click the **Options** menu and then click **Settings**.



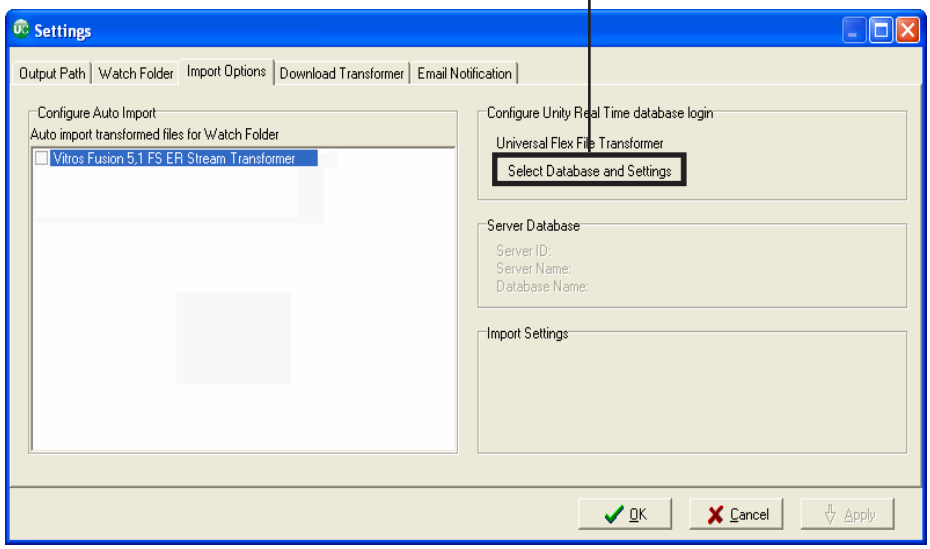
2 Click the **Import Options** tab.



3 Select the transformer for which you want to configure import options.



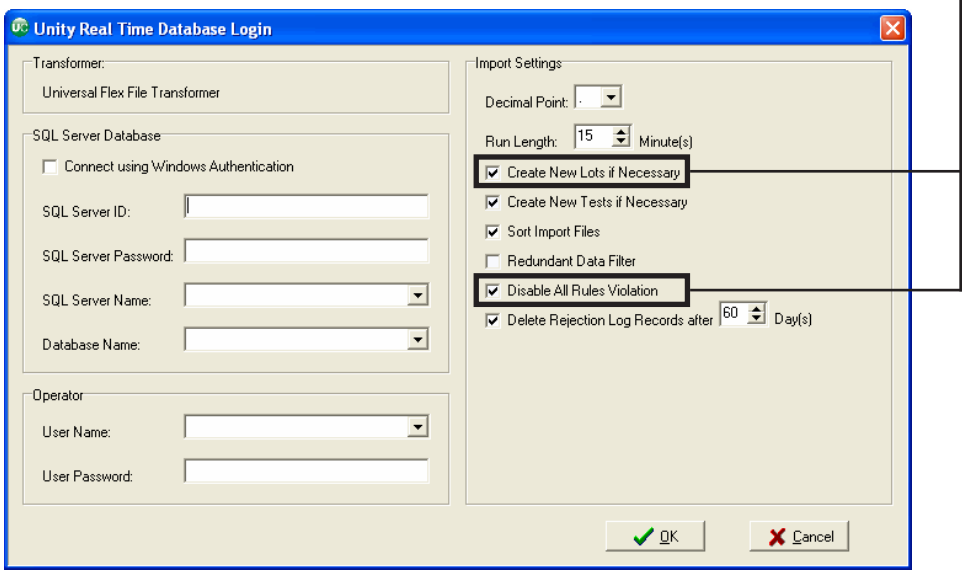
4 Click Select Database and Settings .



5 Make sure the **Create New Lots if Necessary** check box is selected.

The following illustration shows recommended import settings for customers not using their QC data management software for SPC rule evaluation.

Create new Lots if Necessary and **Disable All Rules Violation** check boxes are selected.



6 Click OK .

A new lot is automatically created when UnityConnect finds a new lot in your QC data.

Downloading a Transformer

There are many instrument, middleware, and LIS transformers available for UnityConnect. Downloading a transformer is completed by Bio-Rad prior to configuring your UnityConnect software.

Important: Talk to your Bio-Rad representative for more information about licensing and downloading additional transformers.

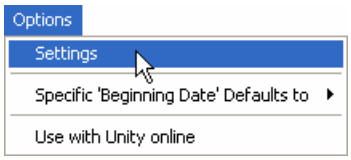
Configuring E-Mail Notification

UnityConnect has the ability to send e-mail notifications to one or more e-mail addresses in the following circumstances:

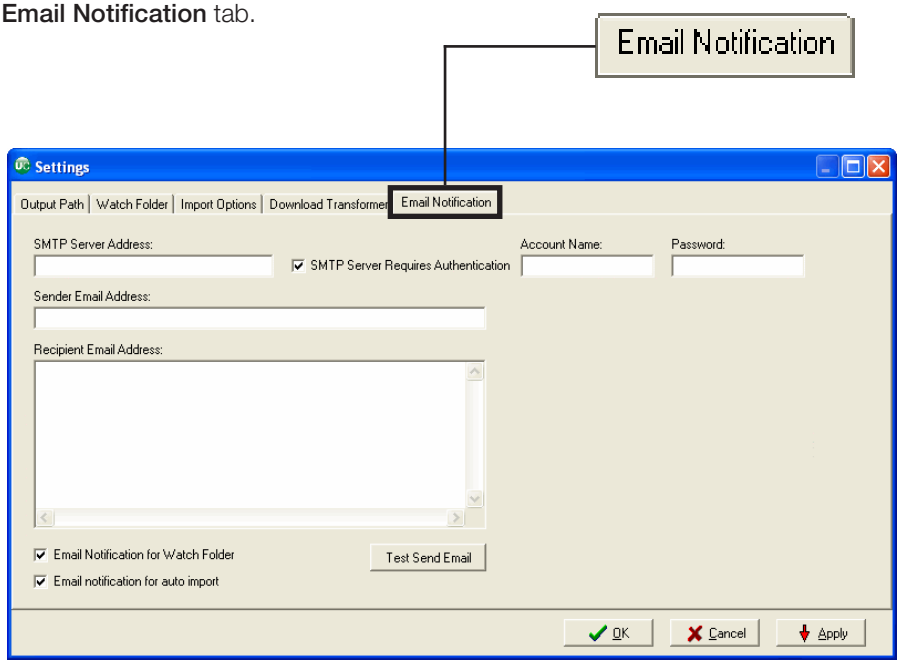
- There is QC data requiring reprocessing.
- There is an error during automatic import.
- A Rejection Log has been created in UnityConnect.

1 Start UnityConnect.

2 Point to **Options** and then click **Settings**.



3 Click the **Email Notification** tab.



4 Type your SMTP server address in the **SMTP Server Address** field.

5 Select the **SMTP Server Requires Authentication** check box if your server requires authentication to send e-mail messages.

6 Type the account name in the **Account Name** field if you selected the **SMTP Server Requires Authentication** check box.

7 Type the password in the **Password** field if you selected the **SMTP Server Requires Authentication** check box.

8 Type a sender e-mail address in the Sender Email Address field.

> **Tip**: This helps prevent the sender e-mail address from being filtered as spam by your e-mail server.

9 Type each e-mail address you want to receive notification in the **Recipient Email Address** field. Type each e-mail address on a separate line.

10 Click 

to test the e-mail settings.

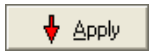
A test e-mail is sent to each recipient.

11 Select the **Email Notification for Watch Folder** check box if you want recipients to receive an e-mail when there is QC data waiting for reprocessing.

12 Select the **Email notification for auto import** if you want recipients to receive an e-mail when an error or rejection occurs during import.

13 Click the appropriate button:

- Click 

to apply the selected settings and close the **Settings** dialog box.
- Click 

to apply the selected settings without closing the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

CHAPTER 6

Configuring UnityConnect for a Data Stream with Web-based Software

In This Chapter

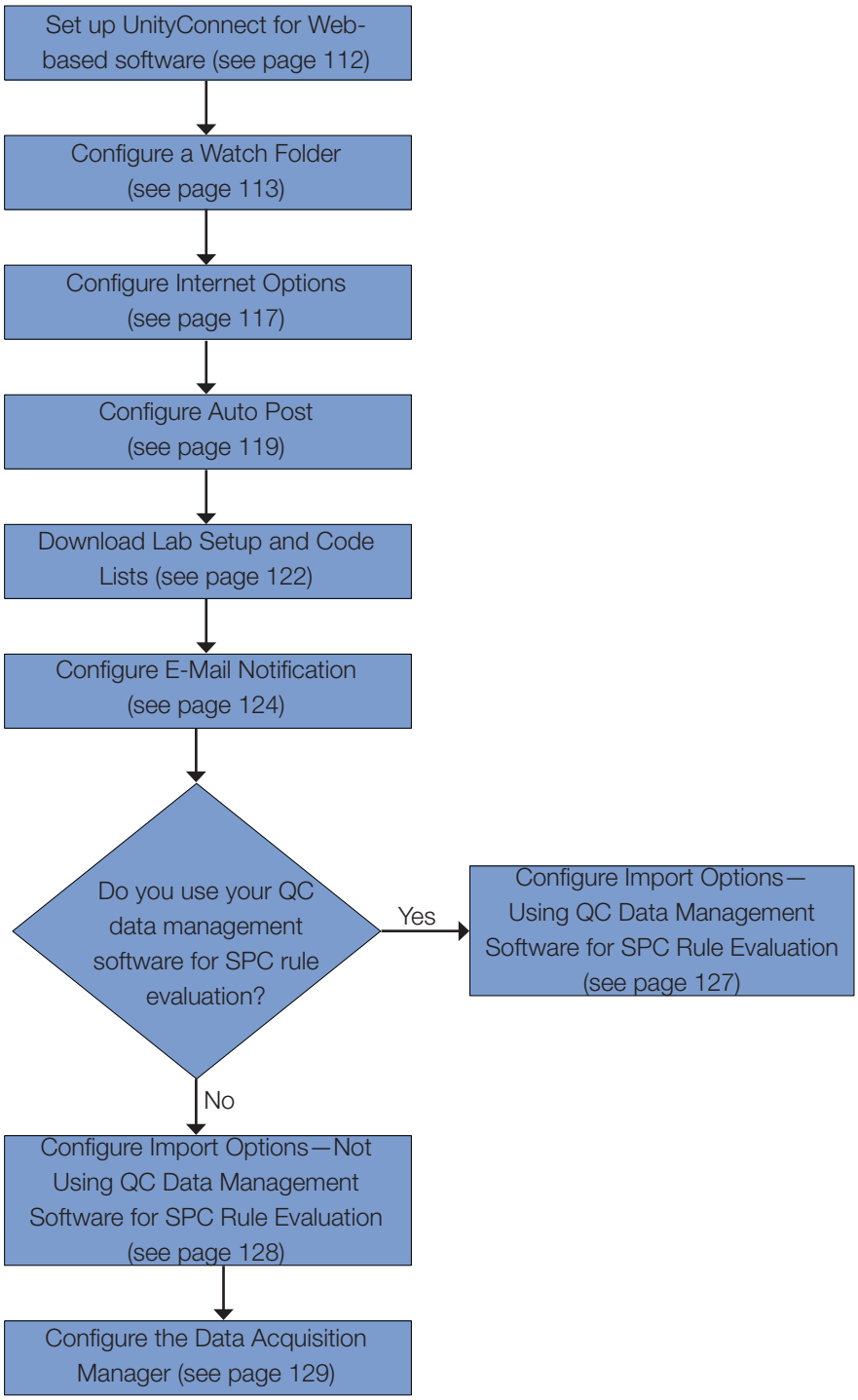
Before You Begin

This chapter is only for customers using a **data stream** from an instrument, middleware, or LIS with UnityConnect and the following **desktop** software:

Unity Real Time online

Configuration Flow Chart

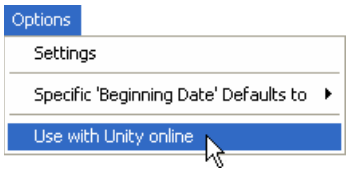
Note: Installation, licensing, and downloading of one or more transformers is completed by Bio-Rad.



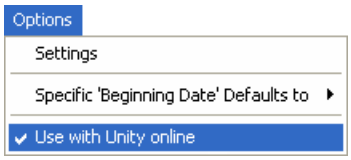
Setting Up UnityConnect for Web-based Software

1 Start UnityConnect.

2 Click the **Options** menu and then click **Use with Unity online**.



A check mark appears to the left indicating the **Use with Unity online** option is selected.



Output Path

Each installed and licensed transformer in UnityConnect requires an output path. The output path is the location where your transformed QC data is stored.

In most instances, the output path is the same location for all transformers. However, depending on your laboratory set up, multiple output paths may be useful. For example, if your laboratory uses multiple transformers, it is useful to have a separate output path for each transformer.

Important: The output path is pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, do not change the output path. Talk to your Bio-Rad representative for more information about output paths.

Configuring a Watch Folder

UnityConnect can be configured to “watch” for data entering a “Watch Folder.”

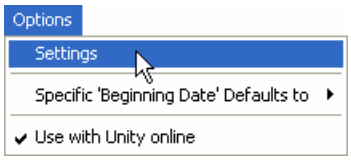
1 Create a new folder on the computer desktop where UnityConnect is installed.

2 Name the folder “Watch Folder.”

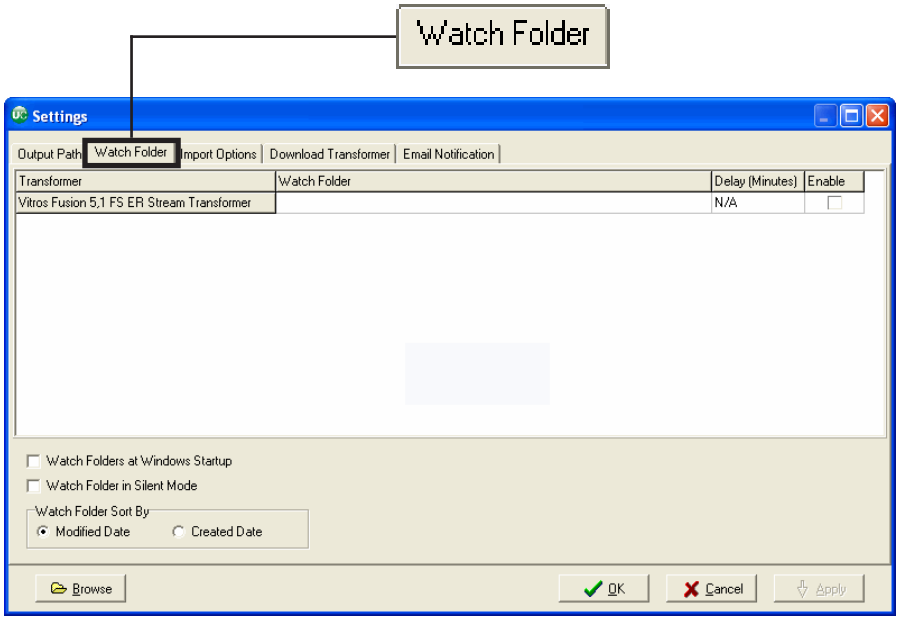
> **Note**: A Watch Folder must be created for each transformer. Give each Watch Folder a unique name if you create more than one Watch Folder. For example, “Watch Folder Meditech” and “Watch Folder RXL.” This helps easily identify the Watch Folder for each transformer.

3 Start UnityConnect.

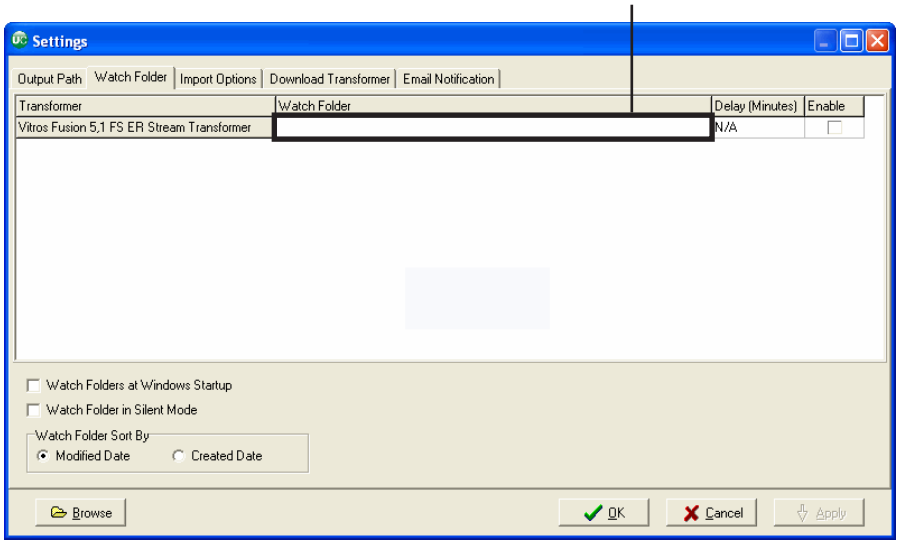
4 Click the **Options** menu and then click **Settings**.



5 Click the **Watch Folder** tab.

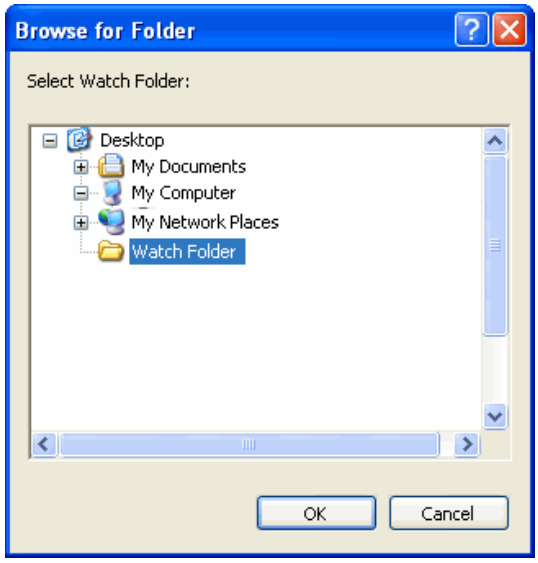


6 Click in the Watch Folder field for the transformer you want to configure.



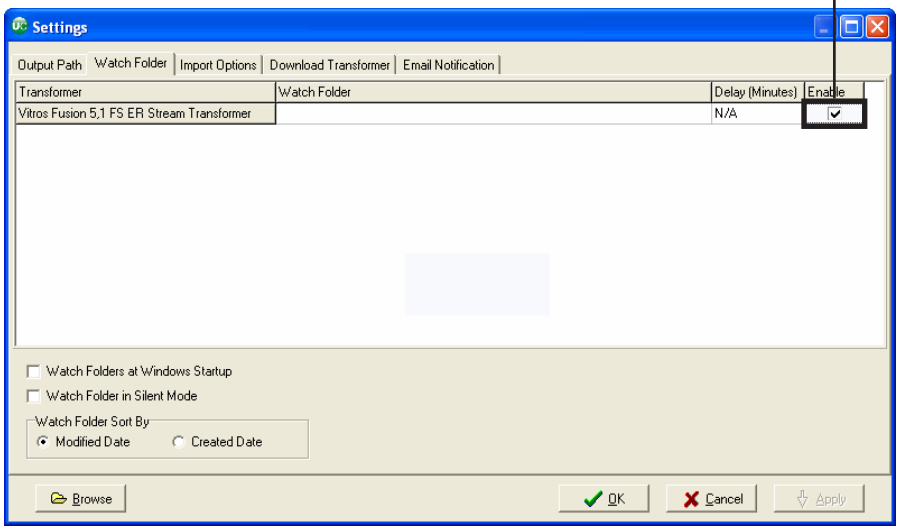
7 Click Browse .

8 Select the Watch Folder you created on your computer desktop.

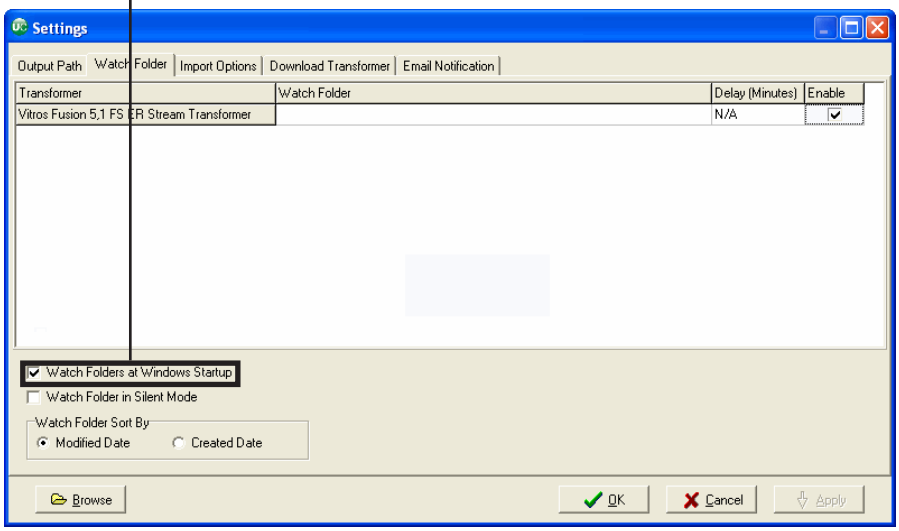


9 Click OK .

10 Select the **Enable** check box for the transformer.

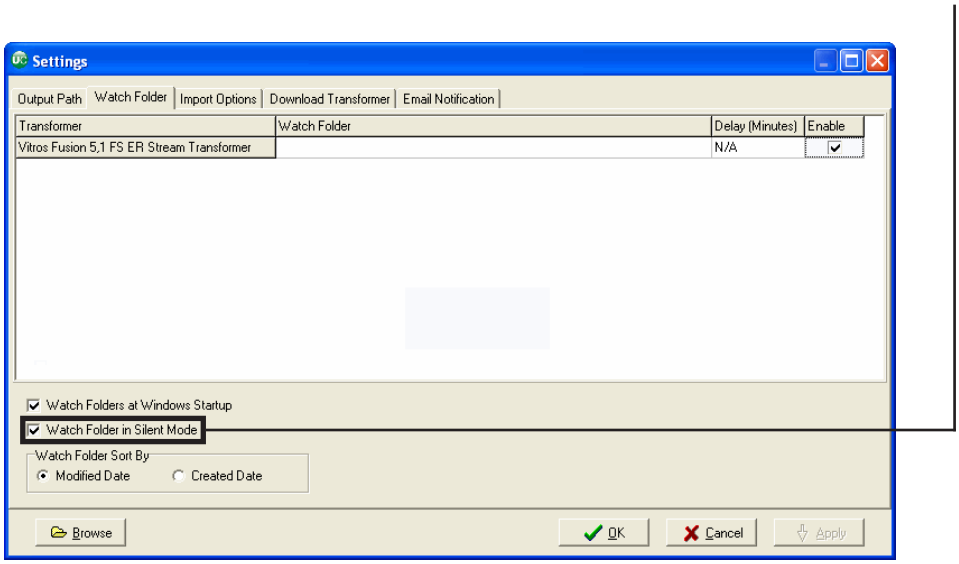


11 Select the **Watch Folders at Windows Startup** check box so the Watch Folder is active each time the computer starts.



Note: You must click Watch on the UnityConnect main window to make the Watch Folder active if you do not select the **Watch Folders at Windows Startup** check box.

12 Select the **Watch Folder in Silent Mode** check box if you want the Watch Folder to run in silent mode.



Note: Silent mode processes all data in the QC data file that UnityConnect recognizes (that is, all data that has been configured in UnityConnect). If UnityConnect does not recognize any item(s) in the QC data file, a copy of the original QC data is saved for later reprocessing when the unrecognized item(s) can be configured. UnityConnect can also be configured to send an e-mail notification when there are QC data files requiring reprocessing. See "Configuring E-Mail Notification" on page 124 for more information.

13 Select a **Watch Folder Sort By** option:

- **Modified Date**
- **Created Date**

14 Click the appropriate button:

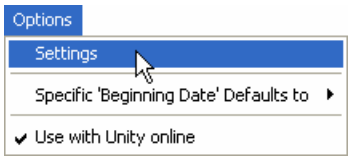
- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without leaving the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

Configuring Internet Options

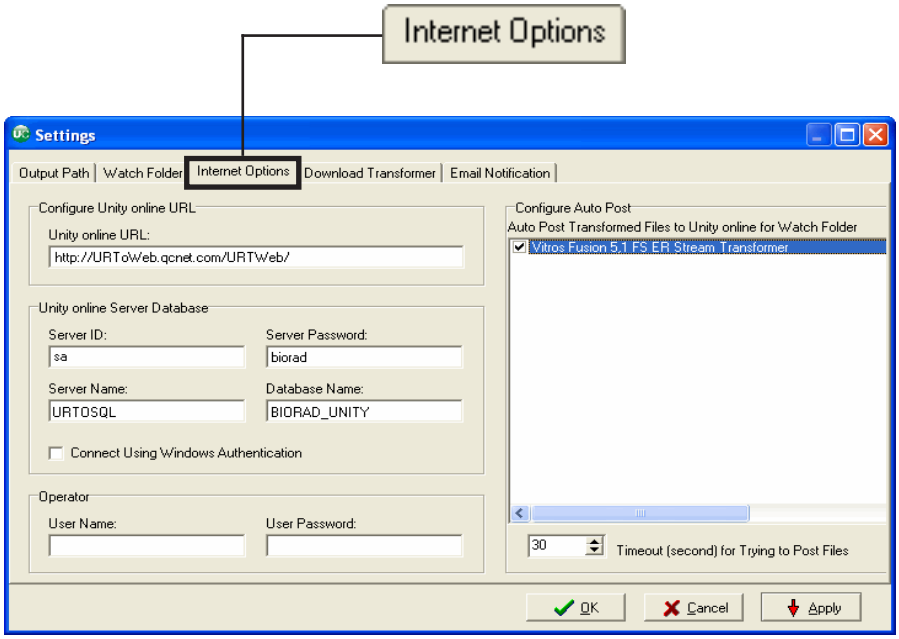
Important: The Internet options are pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, talk to your Bio-Rad representative if you need further assistance with configuring Internet options.

1 Start UnityConnect.

2 Click the **Options** menu and then click **Settings**.



3 Click the **Internet Options** tab.



4 Verify the settings in the following fields:

Field	Setting
Unity online URL:	http://URToWeb.qcnet.com/URTWeb/
Server ID:	sa
Server Password:	biorad
Server Name:	URTOSQL
Database Name:	BIORAD_UNITY

Note: The settings shown above are the suggested settings at the time of this publication.

5 Type the user name you use when logging on to Unity Real Time online in the **User Name** field.

6 Type the password you use when logging on to Unity Real Time online in the **User Password** field.

7 Click the appropriate button:

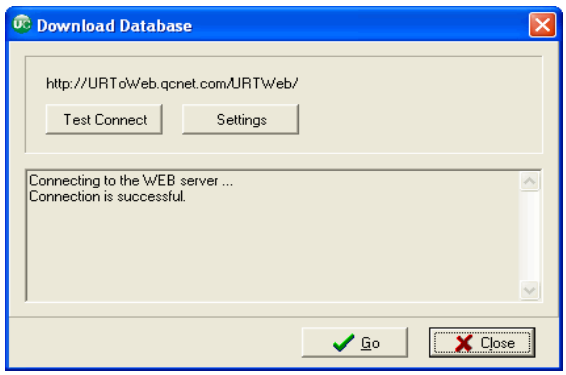
- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without leaving the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

Testing the Internet Connection

You can test the Internet connection after configuration to ensure the configuration is correct.

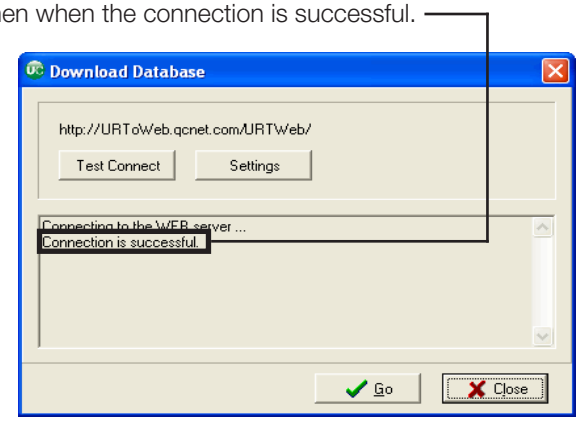
1 Click the **File** menu and then click **Download Database**.

The **Download Database** dialog box appears.



2 Click Test Connect .

A message appears when when the connection is successful.



3 Click Close .

If the Internet Connection Fails

1 Click Settings .

2 Review the configuration and make any changes as required.

3 Repeat the testing as described on the previous page.

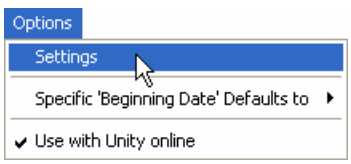
4 Contact Bio-Rad Software Support for assistance if the testing continues to fail.

Configuring Auto Post

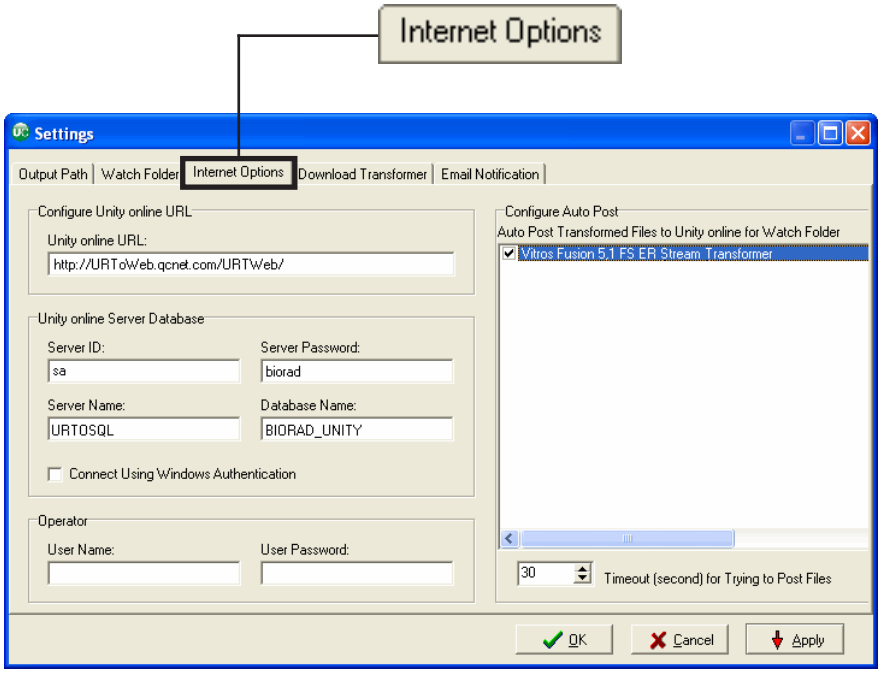
Note: Auto post automatically uploads your transformed QC data to Unity Real Time online.

1 Start UnityConnect.

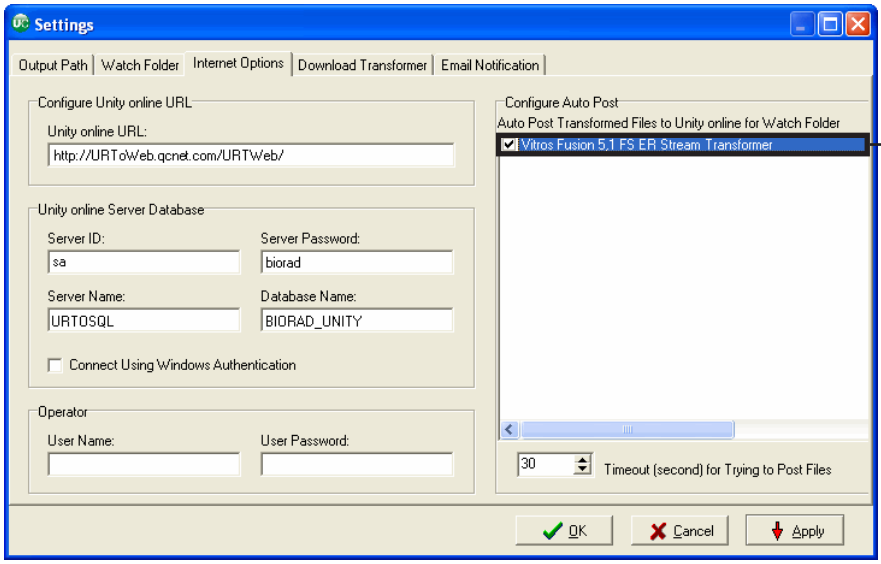
2 Click the **Options** menu and then click **Settings**.



3 Click the **Internet Options** tab.



4 Select the check box for the transformer you want to configure for auto post.



Note: The settings shown in the example above are the suggested settings at the time of this publication.

5 Type the user name you use when logging on to Unity Real Time online in the **User Name** field.

6 Type the password you use when logging on to Unity Real Time online in the **User Password** field.

7 Click the appropriate button:

- Click OK to apply the selected settings and close the **Settings** dialog box.
- Click Apply to apply the selected settings without leaving the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

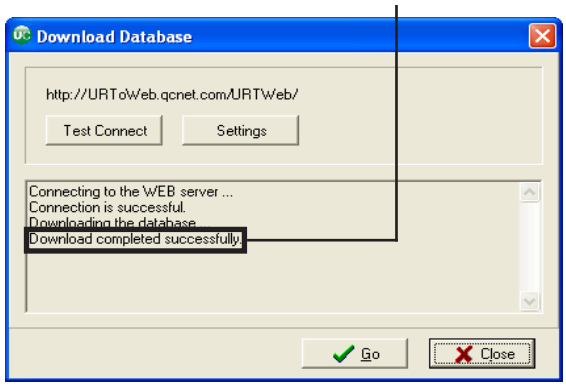
Downloading the Database

Note: The database only needs to be download one time. See "Downloading Lab Setup and Code Lists" on page 122 for information about keeping the database up-to-date.

1 Click the **File** menu and then click **Download Database**.

2 Click Go.

A message appears when when the download completes successfully.

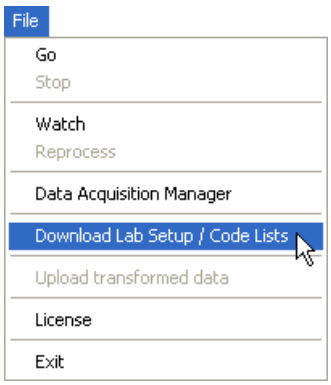


3 Click Close.

Downloading Lab Setup and Code Lists

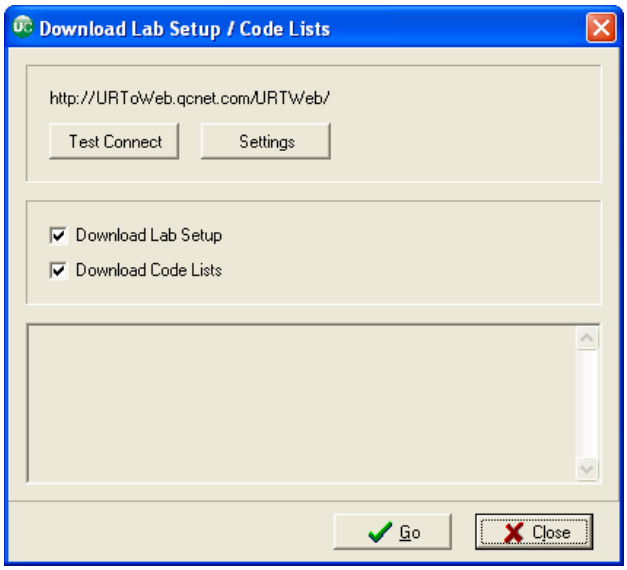
Important: Perform the steps in this section any time you make a configuration change to your QC data management software. In addition, Bio-Rad recommends performing these steps at least monthly to ensure your software always has the most up-to-date codes lists and other information.

1 Click the **File** menu and then click **Download Lab Setup/Code Lists**.



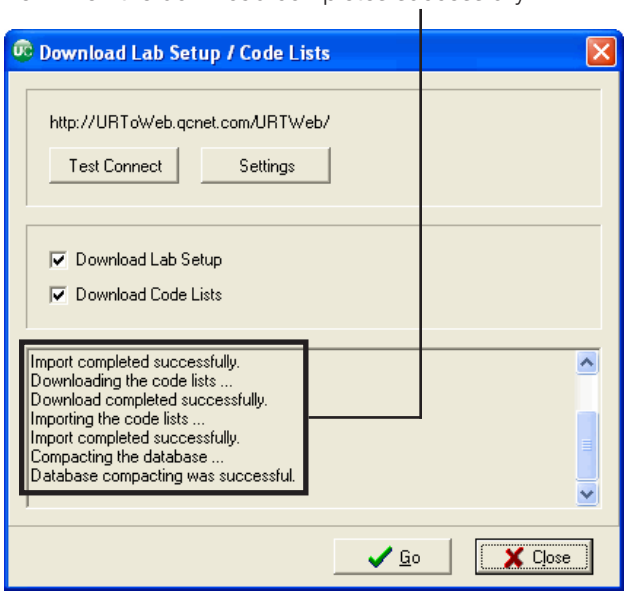
2 Select the check box for each item you want to download:

- **Download Lab Setup**
- **Download Code Lists**



3 Click Go .

A message appears when when the download completes successfully.



4 Click Close .

Downloading a Transformer

There are many instrument, middleware, and LIS transformers available for UnityConnect. Downloading a transformer is completed by Bio-Rad prior to configuring your UnityConnect software.

Important: Talk to your Bio-Rad representative for more information about licensing and downloading additional transformers.

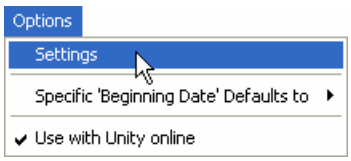
Configuring E-Mail Notification

UnityConnect has the ability to send e-mail notifications to one or more e-mail addresses when:

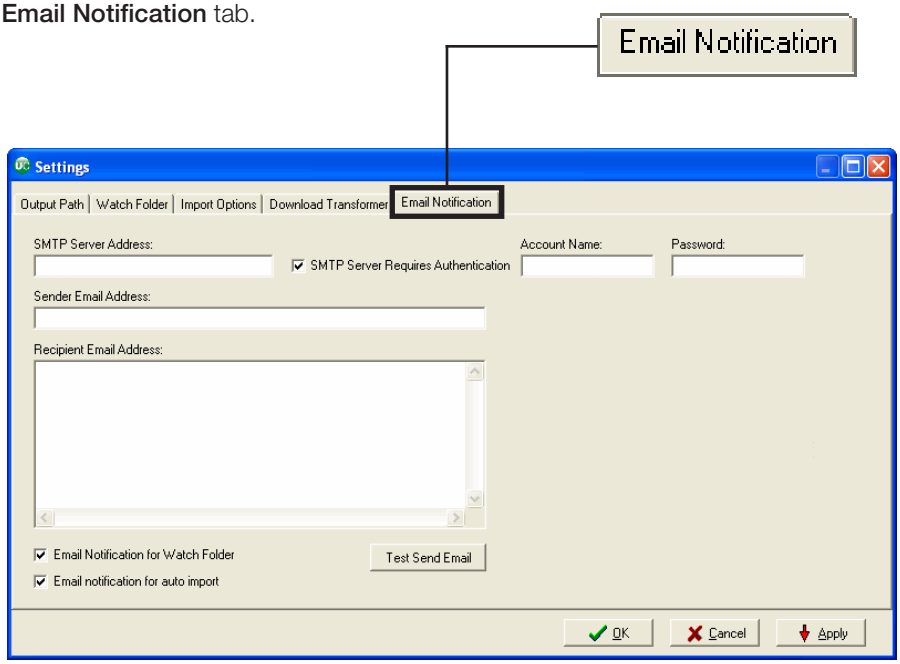
- There are QC data files requiring reprocessing.
- There is an error during automatic posting.

1 Start UnityConnect.

2 Point to the **Options** menu and then click **Settings**.



3 Click the **Email Notification** tab.



4 Type your SMTP server address in the **SMTP Server Address** field.

5 Select the **SMTP Server Requires Authentication** check box if your server requires authentication to send e-mail messages.

6 Type the account name in the **Account Name** field if you selected the **SMTP Server Requires Authentication** check box.

7 Type the password in the **Password** field if you selected the **SMTP Server Requires Authentication** check box.

8 Type a sender e-mail address in the **Sender Email Address** field.

> **Tip**: This helps prevent the sender e-mail address from being filtered as spam by your e-mail server.

9 Type each e-mail address you want to receive notification in the **Recipient Email Address** field. Type each e-mail address on a separate line.

10 Click 

to test the e-mail settings.

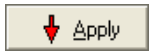
A test e-mail is sent to each recipient.

11 Select the **Email Notification for Watch Folder** check box if you want recipients to receive an e-mail when a file is waiting for reprocessing.

12 Select the Email Notification for Auto Post if you want recipients to receive an e-mail when an error has occurred during auto-post.

13 Click the appropriate button:

- Click 

to apply the selected settings and close the **Settings** dialog box.
- Click 

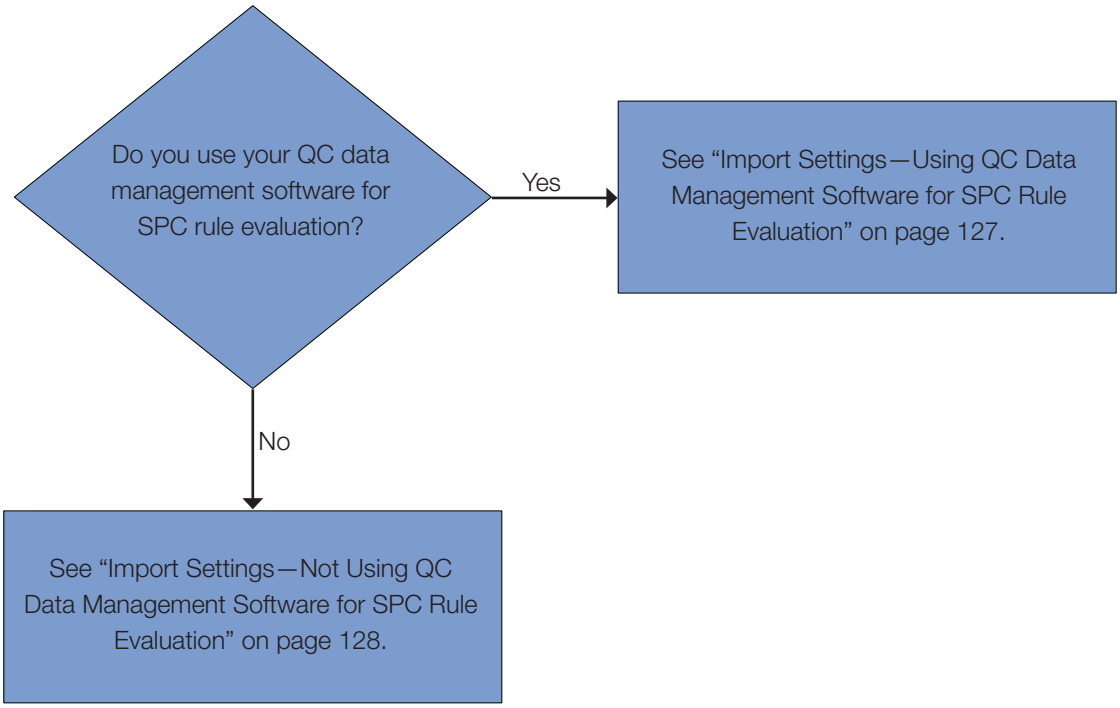
to apply the selected settings without leaving the **Settings** dialog box. This is convenient if you want to continue configuring settings on other tabs.

Configuring Import Settings

Transformed QC data is posted to your QC data management software based on the import settings defined in the software. Select import settings based on your use of your QC data management software for SPC rule evaluation.

> **Note**: The import settings only need to be configured one time. You do not need to configure the settings each time you transform data.

Use the import settings described in the appropriate section according to how you use your QC data management software for SPC rule evaluation.



Import Settings—Using QC Data Management Software for SPC Rule Evaluation

These settings ensure UnityConnect will not create news lots when transforming and overwrite your current SPC rule settings in your QC data management software.

To duplicate your current SPC rule settings from the current lot to the new lot, leave the **Create new Lots** check box blank and duplicate the lot in your QC data management software before transforming data for the lot for the first time. See “Configuring a New Lot” on page 164 for more information.

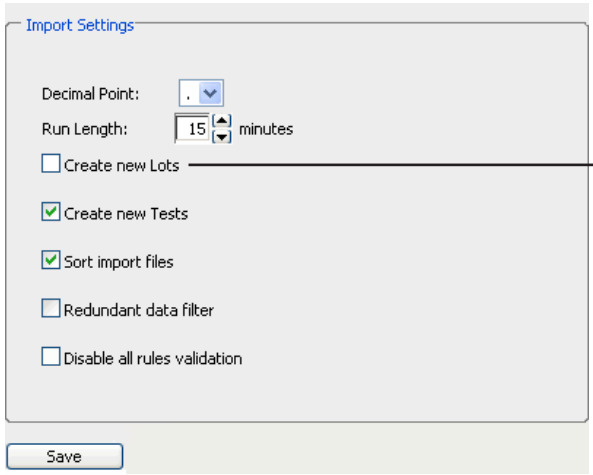
1 Log in to Unity Real Time online.

2 Click the **Tools** tab.

3 Click **Utilities**.

4 Click **Import Settings**.

The following illustration shows recommended import settings for customers using Unity Real Time online for SPC rule evaluation.



Import Settings—Not Using QC Data Management Software for SPC Rule Evaluation

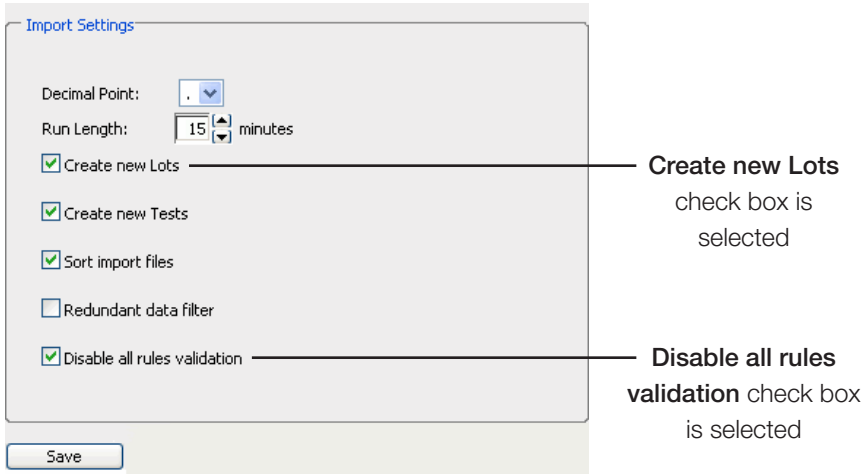
1 Log in to Unity Real Time online.

2 Click the **Tools** tab.

3 Click **Utilities**.

4 Click **Import Settings**.

The following illustration shows recommended import settings for customers who do not use Unity Real Time online for SPC rule evaluation.



CHAPTER 7

Data Acquisition Manager

In This Chapter

Before You Begin

This chapter is only for customers using a **data stream** from an instrument, middleware, or LIS with UnityConnect and any of the following QC data management software:

Unity Desktop
Unity Real Time
Unity Real Time online

Overview

The Data Acquisition Manager in UnityConnect provides the ability to collect data from an instrument, middleware, or LIS on a real-time basis when installed with the proper network or wireless hardware. The existing flow of data (QC, patient, and support) between the instrument, middleware, or LIS is not affected.

Installing the Service

The Data Acquisition Manager Service (Service) captures data from your instrument, middleware, or LIS (devices). Installing the Service activates the connections between the Data Acquisition Manager and devices.

Note: This is a one-time setup. The message "Service is running" appears if the Data Acquisition Manager Service is already installed.

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Click the **Service** menu and then click **Install Service**.

The message "Service is installed but is not started" appears.

4 See "Starting and Stopping the Service" on page 132 for more information.

Working with Devices

The Data Acquisition Manager in UnityConnect supports instrument, middleware, and LIS devices.

Important: The device settings are pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, do not change the device settings. Talk to your Bio-Rad representative for more information if you need to add another device or change the device settings.

Adding a Device

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Click the **Device** menu and then click **Add**.

Important: The device settings are pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, do not change the device settings. Talk to your Bio-Rad representative for more information if you need to add another device or change the device settings.

Deleting a Device

Important: Deleting a device permanently removes the configuration from the Data Acquisition Manager. Talk to your Bio-Rad representative for more information before you delete a device.

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Select the device you want to delete.

4 Click the **Device** menu and then click **Delete**.

Modifying a Device

Important: The device settings are pre-configured by Bio-Rad. Due to the unique configuration of your customized UnityConnect software, do not modify the device settings. Talk to your Bio-Rad representative for more information if you need to modify the device settings.

Connecting a Single Device

1 Start UnityConnect.

2 Click the File menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Select the device you want to connect.

4 Click the **Device** menu and then click **Connect**.

Connecting All Devices

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Click the **Device** menu and then click **Connect All Devices**.

Disconnecting a Single Device

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Select the device you want to disconnect.

4 Click the **Device** menu and then click **Disconnect**.

Disconnecting All Devices

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Click the **Device** menu and then click **Disconnect All Devices**.

Starting and Stopping the Service

Starting the Service initiates communication between the Data Acquisition Manager and your configured instrument, middleware, or LIS.

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Click the **Service** menu and then click **Start Service**.

Symbol	Indicates
Green circle	Successful connection of the Data Acquisition Manager Service and data flow from the instrument, middleware, or LIS.
Red stop symbol	Successful connection of the Data Acquisition Manager Service but no data flow from the instrument, middleware, or LIS.
No symbol	No connection of the Data Acquisition Manager Service. The Service is not started or the device is disconnected.

Stopping the Service

1 Start UnityConnect.

2 Click the **File** menu and then click **Data Acquisition Manager**.

The **Data Acquisition Manager** dialog box appears.

3 Click the **Service** menu and then click **Stop Service**.

Symbol	Indicates
Green circle	Successful connection of the Data Acquisition Manager Service and data flow from the instrument, middleware, or LIS.
Red stop symbol	Successful connection of the Data Acquisition Manager Service but no data flow from the instrument, middleware, or LIS.
No symbol	No connection of the Data Acquisition Manager Service. The Service is not started or the device is disconnected.

Exception Files

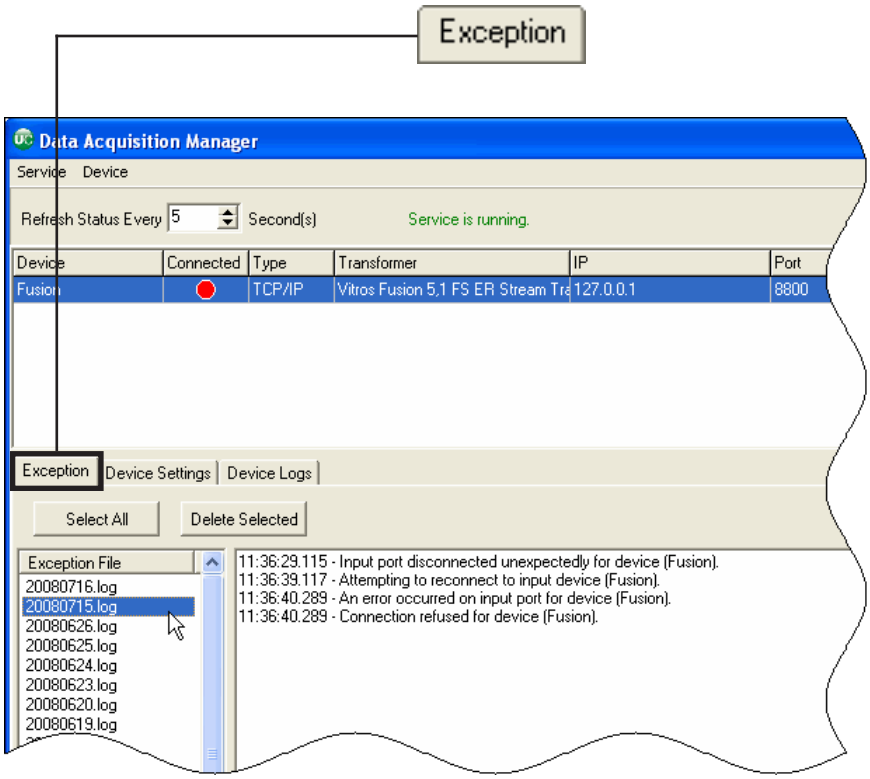
An exception file is created each time there is communication between the Data Acquisition Manager and a device. Viewing exception files can be helpful if you are troubleshooting communication problems.

Viewing Exception Files

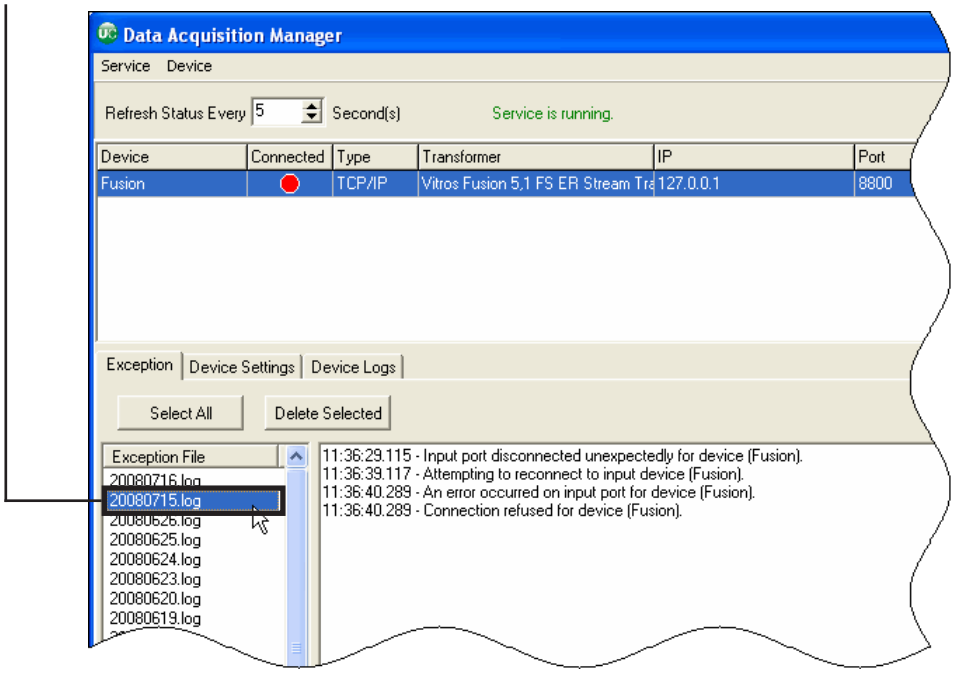
1 Click the **File** menu and then click **Data Acquisition Manager**.

2 Select the device you want to view.

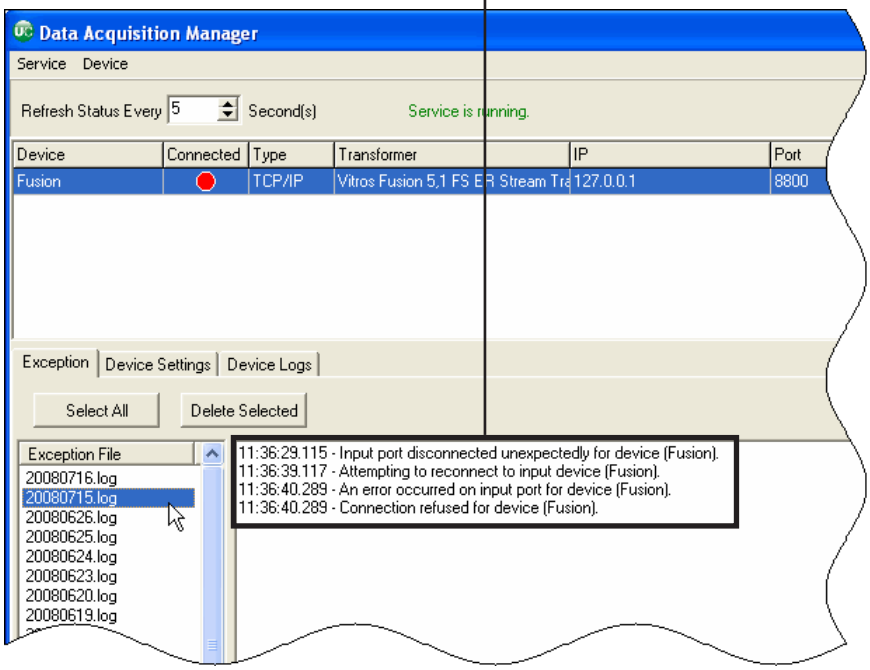
3 Click the **Exception** tab.



4 Select the date of the exception files you want to view. The most recent day is at the top of the list.



The details appear here.

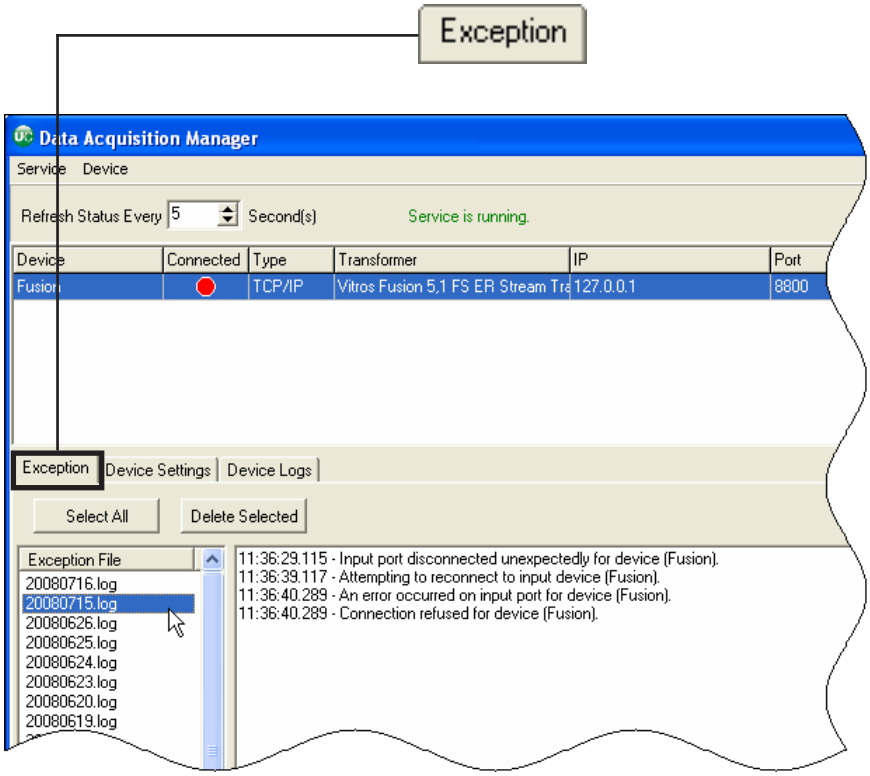


Deleting Exception Files

1 Click the **File** menu and then click **Data Acquisition Manager**.

2 Select the device with the exception files you want to delete.

3 Click the **Exception** tab.



4 Select an individual exception file to delete or click Select All .

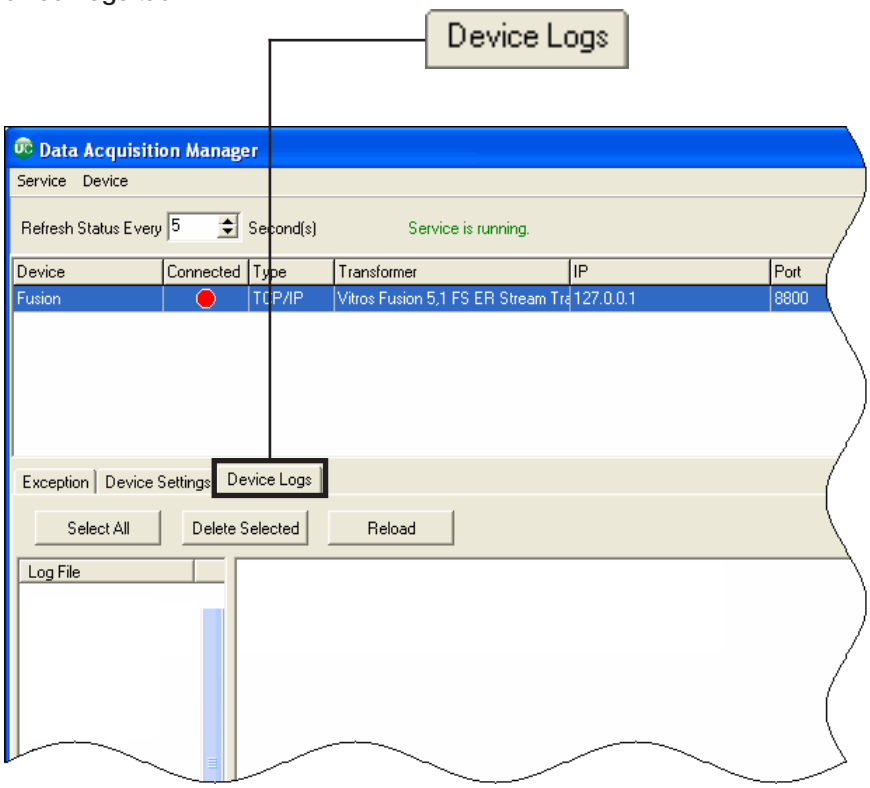
5 Click Delete Selected .

Device Logs

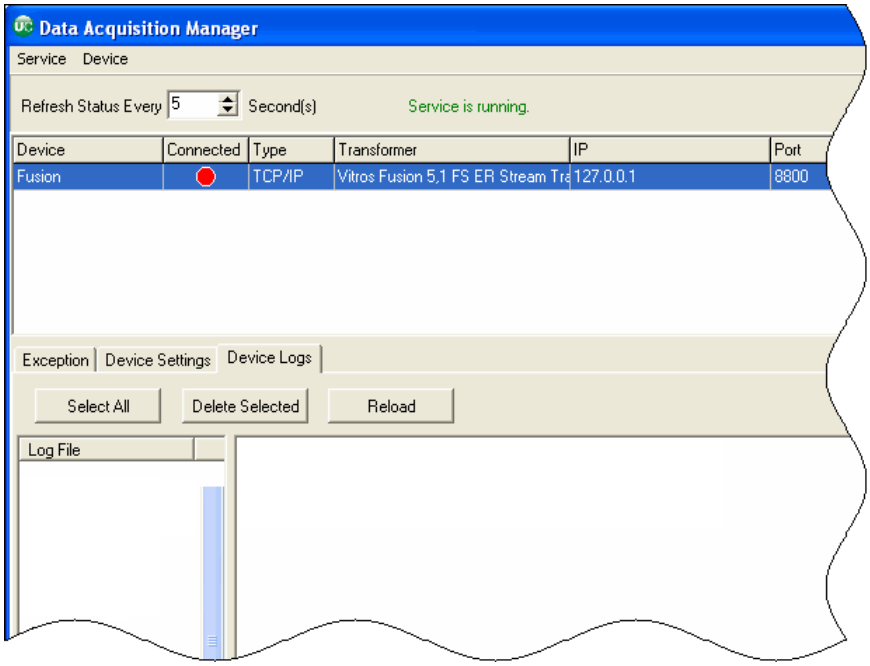
Viewing Device Logs

1 Click the **File** menu and then click **Data Acquisition Manager**.

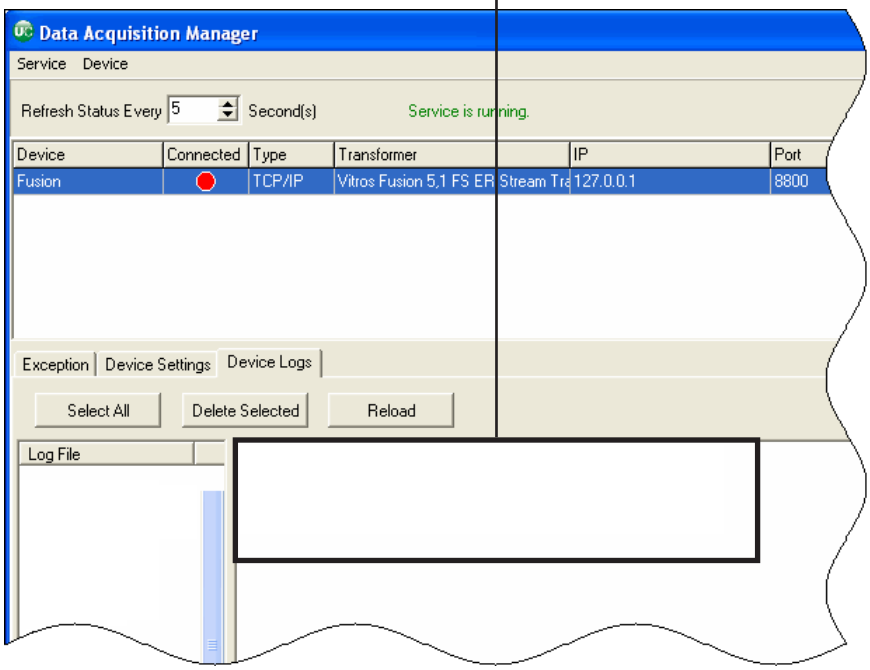
2 Click the **Device Logs** tab.



3 Select the device log you want to view.



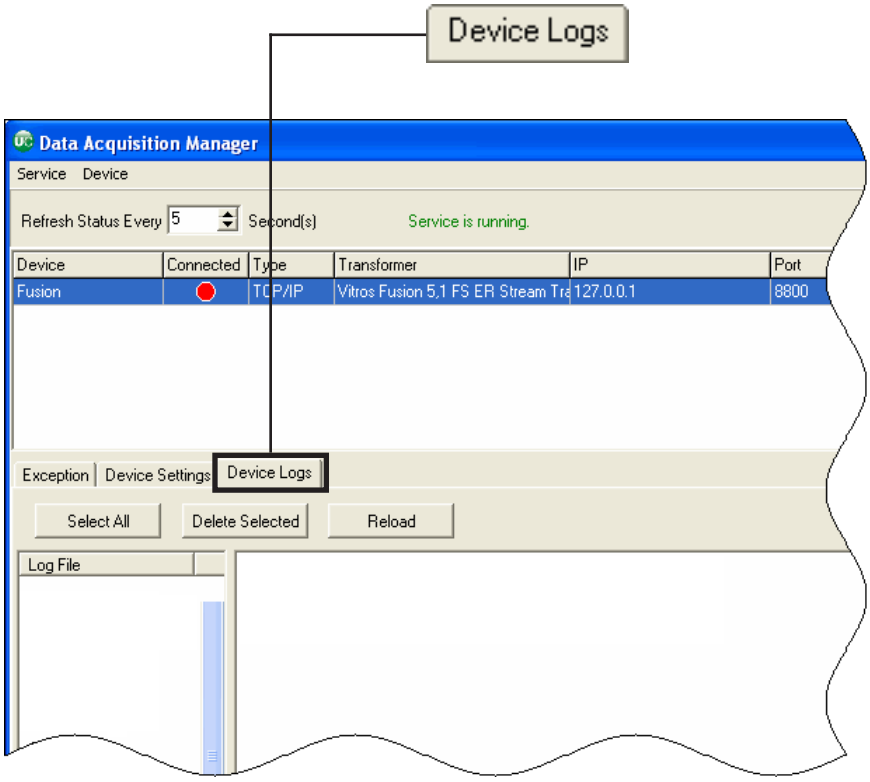
The details appear here.



Deleting Device Logs

1 Click the **File** menu and then click **Data Acquisition Manager**.

2 Click the **Device Logs** tab.



3 Select an individual device log to delete or click Select All .

4 Click Delete Selected .

CHAPTER 8

Transforming Data for Desktop Software

In This Chapter

Overview

Note: This chapter describes the transforming process for the **data file transfer method** only.

Transforming data is the process of translating your QC data from the format of your instrument, middleware, or LIS into the Bio-Rad format. After transforming, data is automatically imported into your QC data management software.

Before You Begin

This chapter is only for customers using UnityConnect with the **data file transfer method** and any of the following **desktop** software:

Unity Desktop

Unity Real Time

Best Practices—Transform Data Often

Bio-Rad recommends transforming data as often as possible throughout the month. This helps you become more familiar with the transformation process and alleviates the stress and pressure at the end of the month.

Transforming Data—Data File Transfer Method

Before You Begin

1 Place the QC data file in the **QC Data Folder** on your computer desktop or insert the CD or disk into the disk drive.

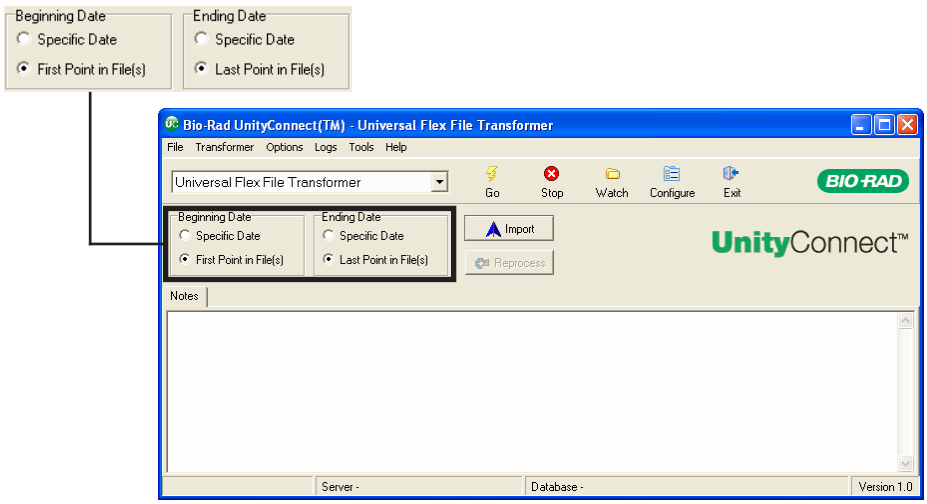
2 Give the QC data file a unique name so it can easily be identified.

3 Verify the import options as described in “Configuring Import Options” on page 68.

Note: The import options only need to be configured one time. You do not need to configure the settings each time you transform data.

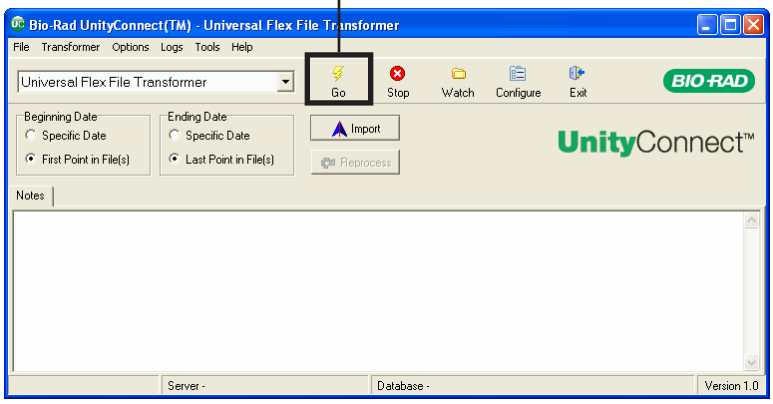
1 Open UnityConnect.

2 Set the date range for the data to transform. Data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.

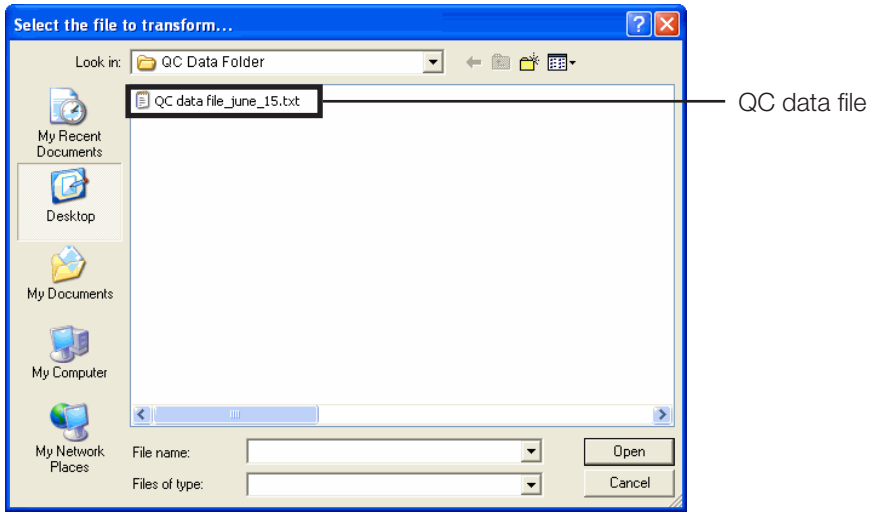


Note: See "Configuring the Default Date Settings" on page 75 for information about customizing the date range.

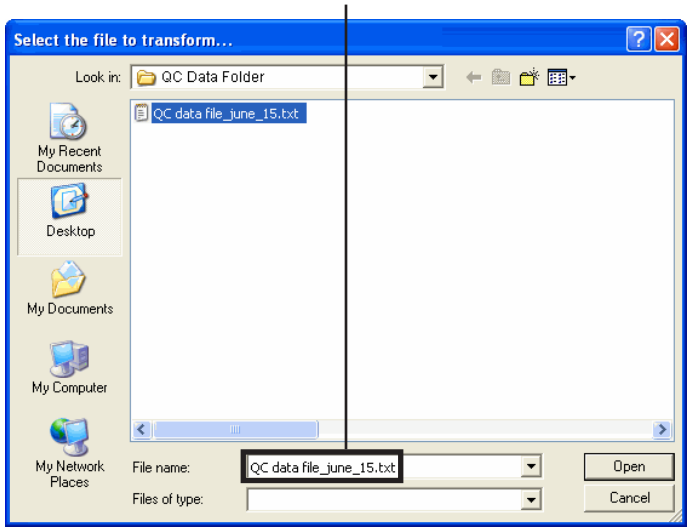
3 Click Go.



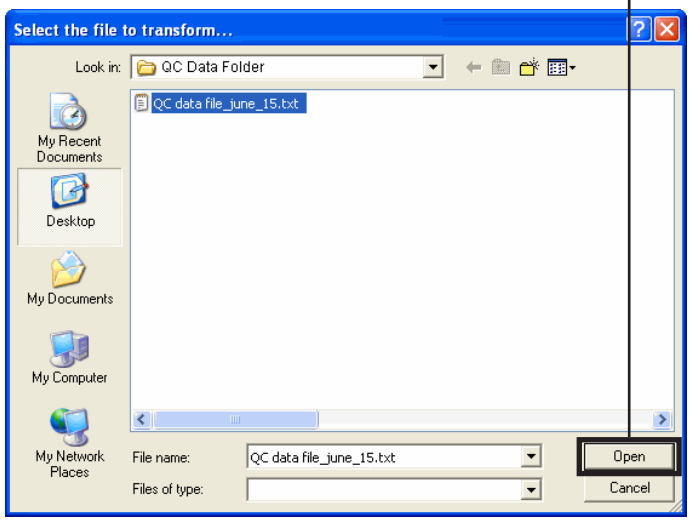
4 Select the QC data file to transform.



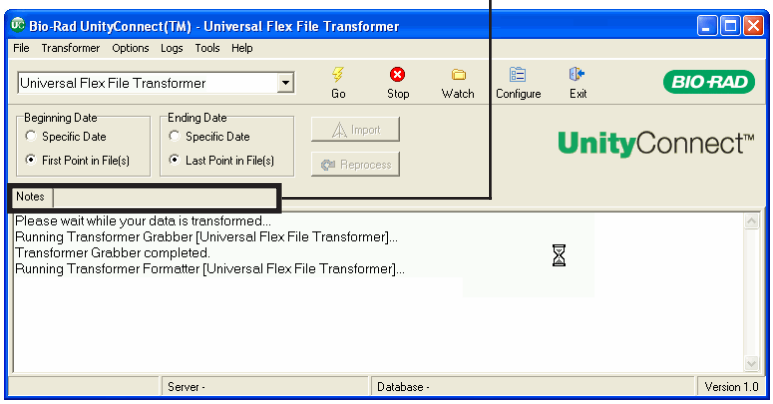
The QC data file name appears here after selecting it.



5 Click **Open**.

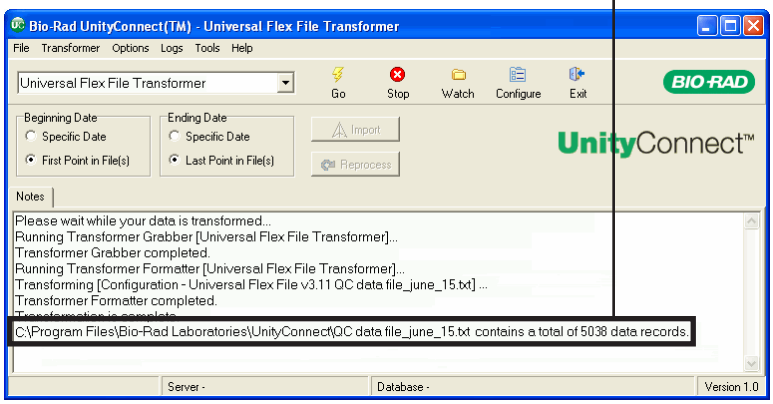


A message states the transformation is in progress.



Note: A message appears if UnityConnect finds a new QC item requiring configuration. See Chapter 10, “New Configuration in UnityConnect” for more information.

A second message appears when transformation is complete.



6 Read the information in the **Notes** section carefully and note the number of data records transformed.

Important: Transformed data is automatically imported into your QC data management software if configured to do so. See “Configuring Watch Folder and Automatic Import” on page 64 for more information.

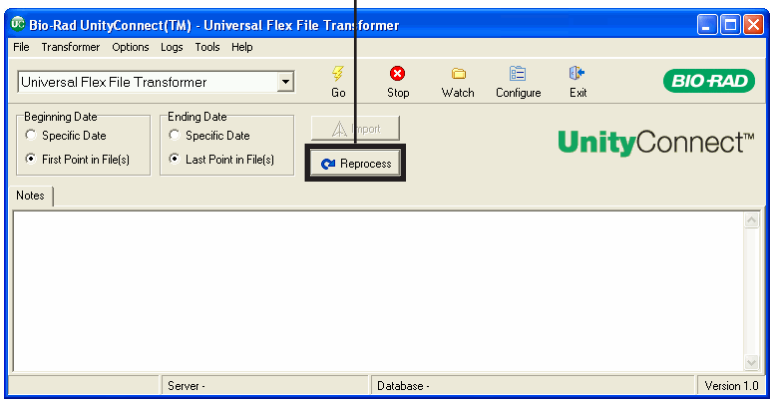
Reprocessing QC Data Files

When UnityConnect is used in silent watch mode, files requiring configuration are stored for reprocessing at a later date. Data already configured is transformed and imported. See “Configuring Watch Folder and Automatic Import” on page 64 for more information.

Note: An e-mail is sent to the recipients listed on the **Email Notification** tab stating a file is waiting to be reprocessed if configured to do so. See “Configuring E-Mail Notification” on page 89 for more information. If an e-mail notification is not configured, the Reprocess button in UnityConnect indicates a file is ready to be reprocessed.

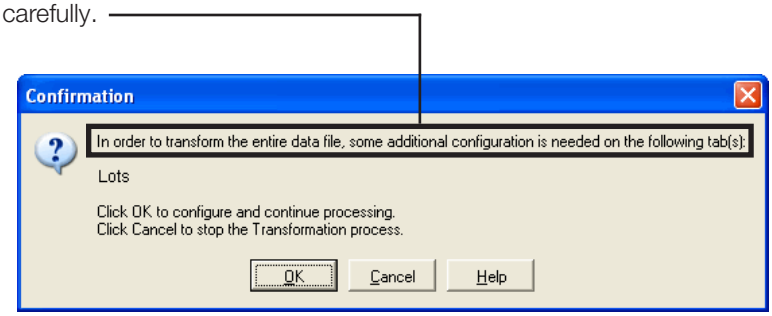
1 Start UnityConnect.

2 Click Reprocess.



A message appears when UnityConnect finds the item(s) requiring configuration.

3 Read the note carefully.



Important: This is not an error message. The message is simply stating there are new codes in the QC data file that have not been matched to Bio-Rad codes in your QC data management software.

4 Click OK.

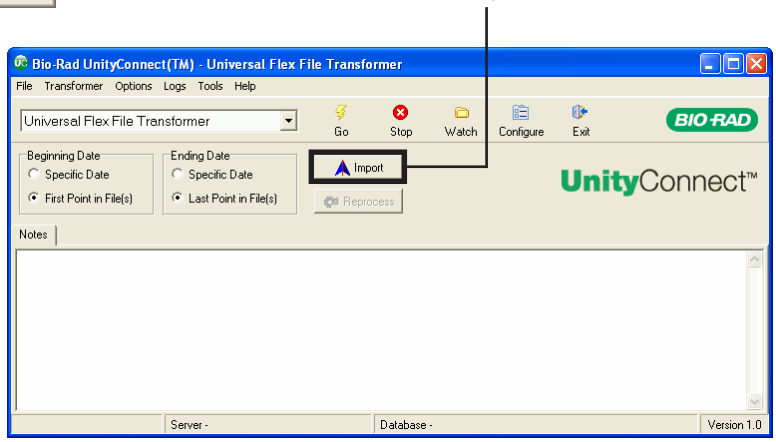
5 Log in to your QC data management software database if prompted.

UnityConnect presents the tab requiring configuration.

6 Configure all tabs UnityConnect presents.

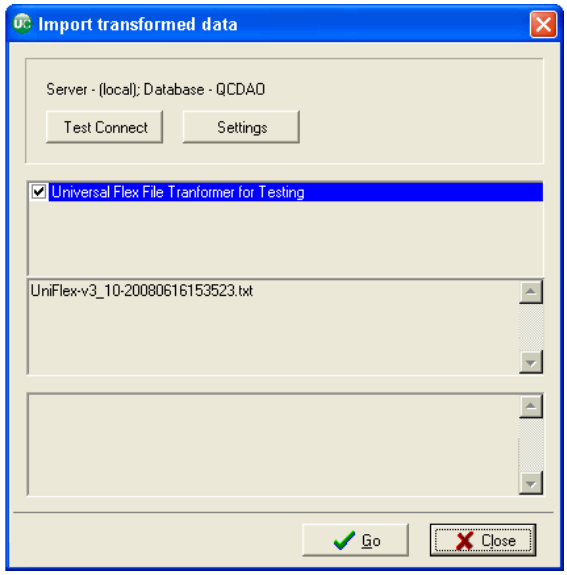
Tip: See Chapter 10, “New Configuration in UnityConnect” for more information.

7 Click Import after the file has completed transforming.



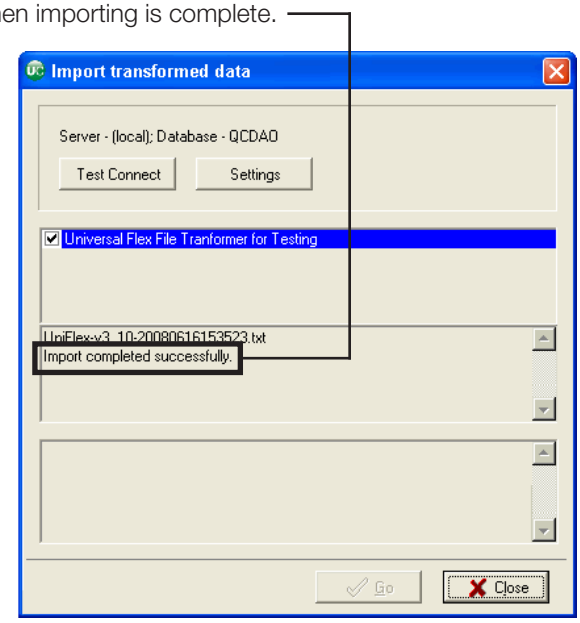
Note: Automatic import does not occur when reprocessing QC data files even if UnityConnect is configured for automatic import.

The **Import transformed data** dialog box appears.



8 Click Go .

A message appears when importing is complete.



9 Click Close .

Best Practicies—Review the Number of Data Records Transformed

Always review and note the number of data records transformed. Customers who transform data on a regular basis at the same time each month will become familiar with the typical number of data points in their transformed QC data file. For example, if your transformed file normally contains 10,000 data points (records) for the month but the message indicates 3,000 records, further investigation may be required to ensure the QC data file you transformed contained all of your QC data for the month.

Working with Multiple QC Data Files

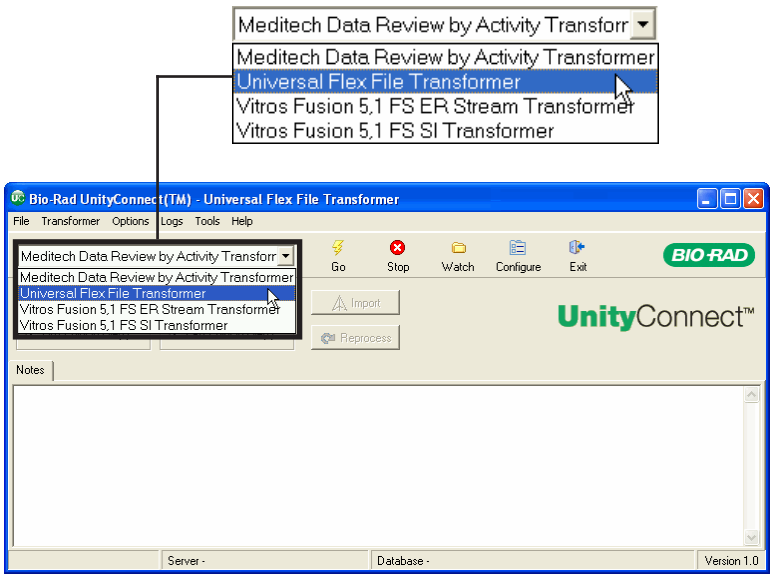
Important: Due to the unique configuration of your customized UnityConnect software, talk to your Bio-Rad representative about the best process for transforming multiple QC data files for your laboratory.

Some Laboratory Information Systems (LIS) output multiple files when creating QC data files. One example is the Orchard LIS. UnityConnect can be configured to automatically process one directory containing multiple files which simplifies the transformation process.

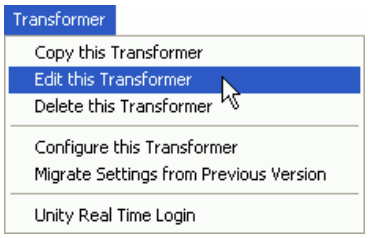
Configuring UnityConnect to Transform a Directory of Files

Note: You must perform a one-time configuration for each transformer.

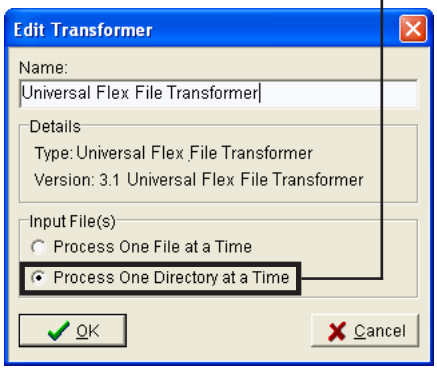
1 Select the transformer you want to set up to process a directory of files.



2 Click the **Transformer** menu and then click **Edit this Transformer**.



3 Select the **Process One Directory at a Time** option.

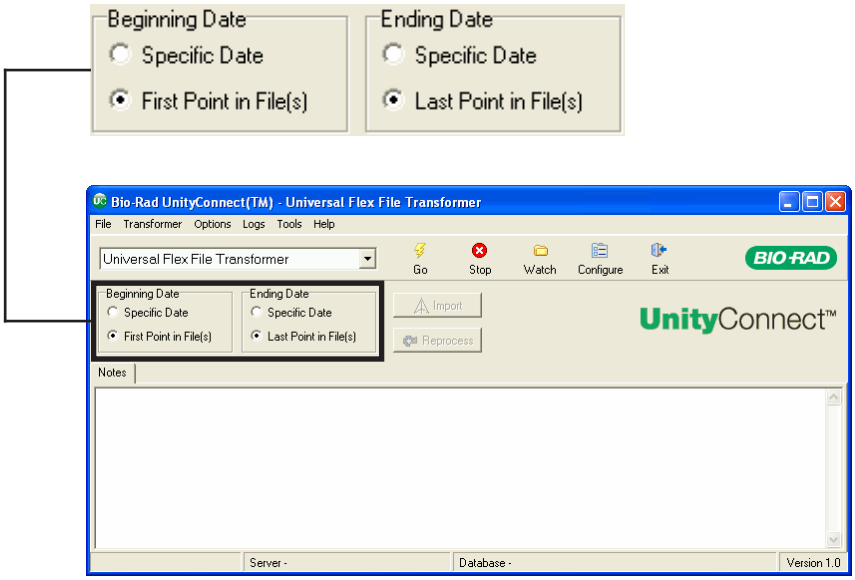


4 Click OK .

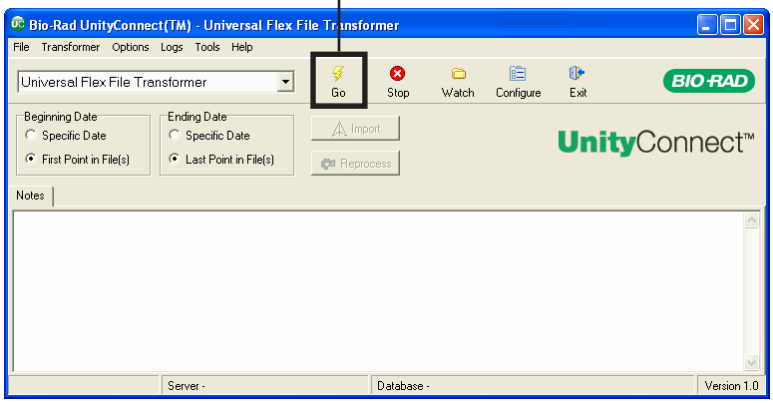
Transforming a Directory of Files

1 Open UnityConnect.

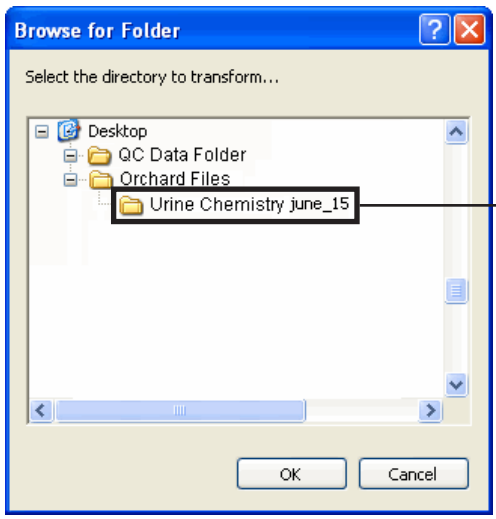
2 Set the date range for the data to transform. Data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.



3 Click Go.



4 Select the directory (or folder) containing the multiple data files to transform.



5 Click OK.

Best Practices—Review the Number of Data Records Transformed

Always review and note the number of data records transformed. Customers who transform data on a regular basis at the same time each month will become familiar with the typical number of data points in their transformed QC data file. For example, if your transformed file normally contains 10,000 data points (records) for the month but the message indicates 3,000 records, further investigation may be required to ensure the QC data file you transformed contained all of your QC data for the month.

CHAPTER 9

Transforming Data for Web-based Software

In This Chapter

Overview

Note: This chapter describes the transforming process for the **data file transfer method** only.

Transforming data is the process of translating your QC data from the format of your instrument, middleware, or LIS into the Bio-Rad format. After transforming, data is automatically imported into your QC data management software.

Before You Begin

This chapter is only for customers using UnityConnect with any of the following **Web-based** software:

UnityWeb 2.0

Unity Real Time online

Best Practices—Transform Data Often

Bio-Rad recommends transforming data as often as possible throughout the month. This helps you become more familiar with the transformation process and alleviates the stress and pressure at the end of the month.

Transforming Data—Data File Transfer Method

Before You Begin

1 Place the QC data file in the **QC Data Folder** on your computer desktop or insert the CD or disk into the disk drive.

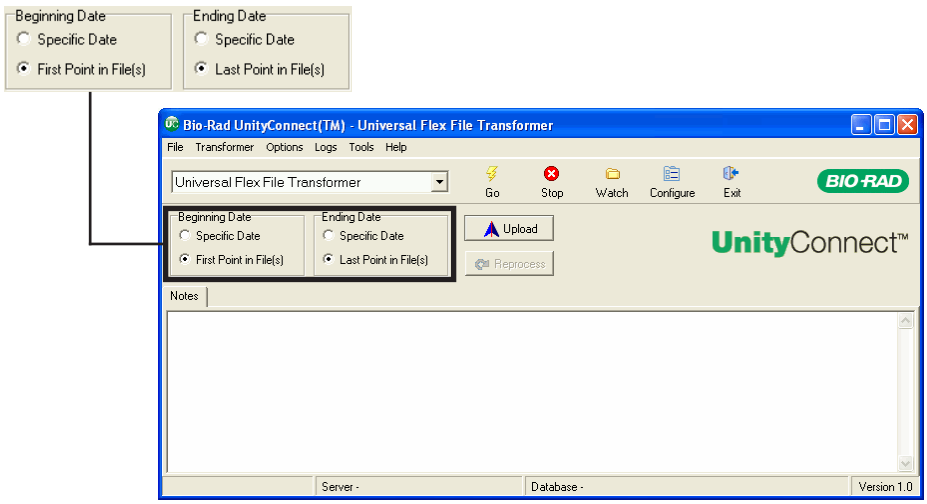
2 Give the QC data file a unique name so it can easily be identified.

3 Verify the import options as described in “Configuring Import Options” on page 68.

Note: The import options only need to be configured one time. You do not need to configure the settings each time you transform data.

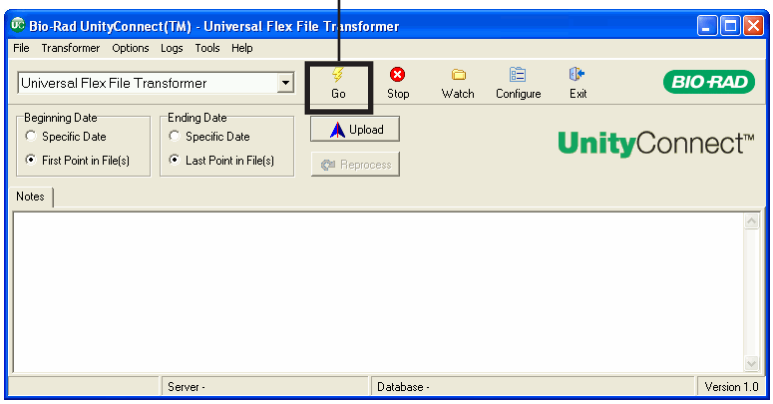
1 Open UnityConnect.

2 Set the date range for the data to transform. Data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.

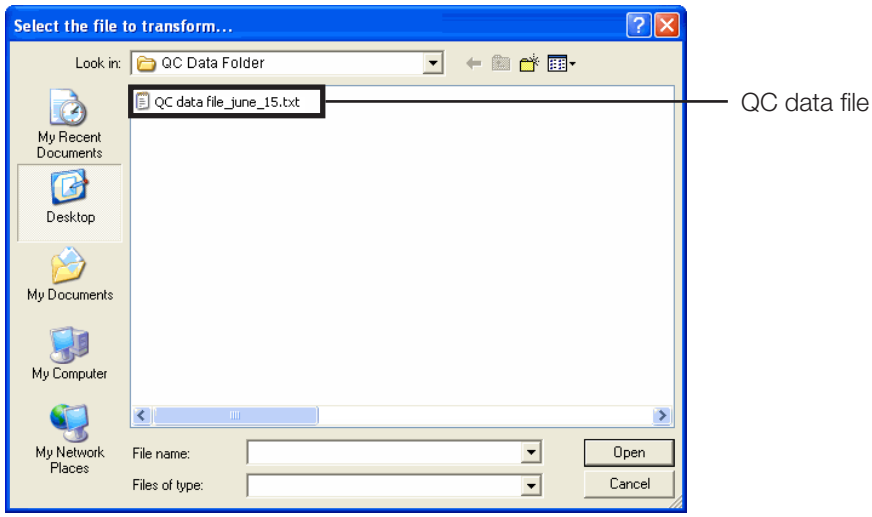


Note: See "Configuring the Default Date Settings" on page 75 for information about customizing the date range.

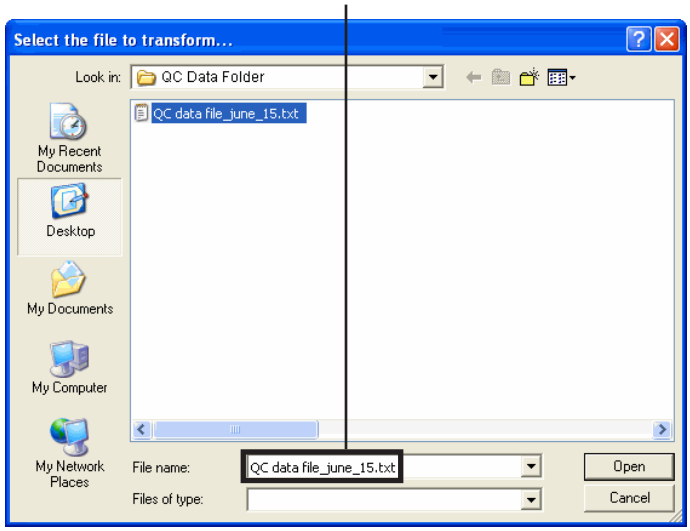
3 Click Go.



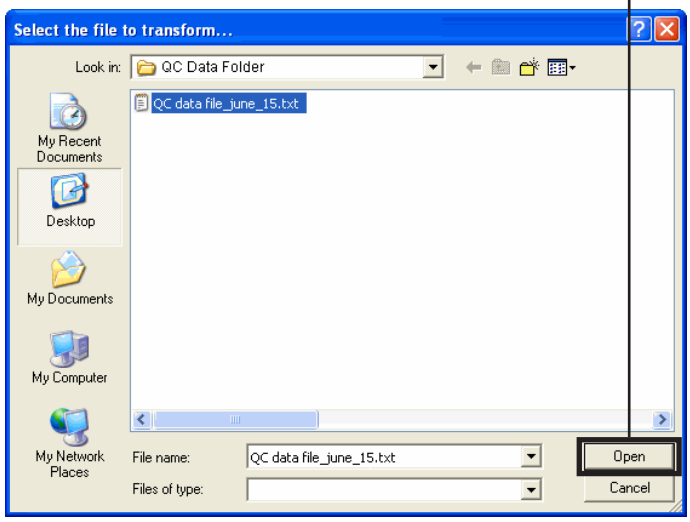
4 Select the QC data file to transform.



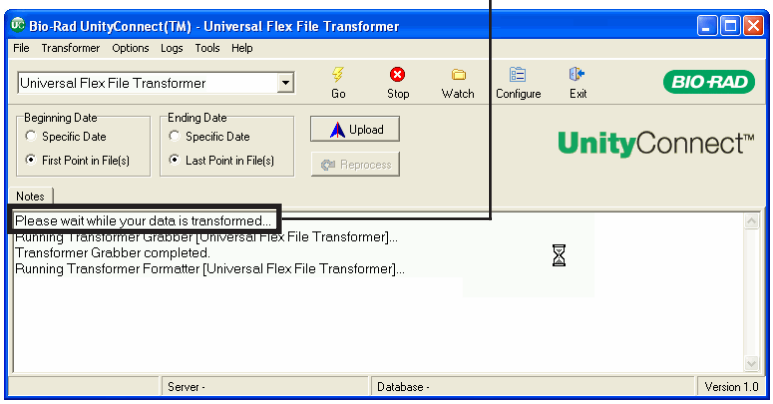
The QC data file name appears here after selecting it.



5 Click **Open**.

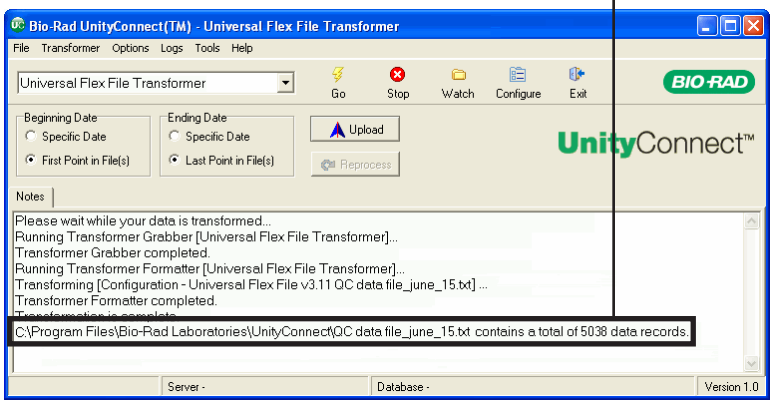


A message states the transformation is in progress.



Note: A message appears if UnityConnect finds a new QC item requiring configuration. See Chapter 10, “New Configuration in UnityConnect” for more information.

A second message appears when transformation is complete.



6 Read the information in the **Notes** section carefully and note the number of data records transformed.

Important: Transformed data is automatically imported into your QC data management software if configured to do so. See “Configuring E-Mail Notification” on page 74 for more information.

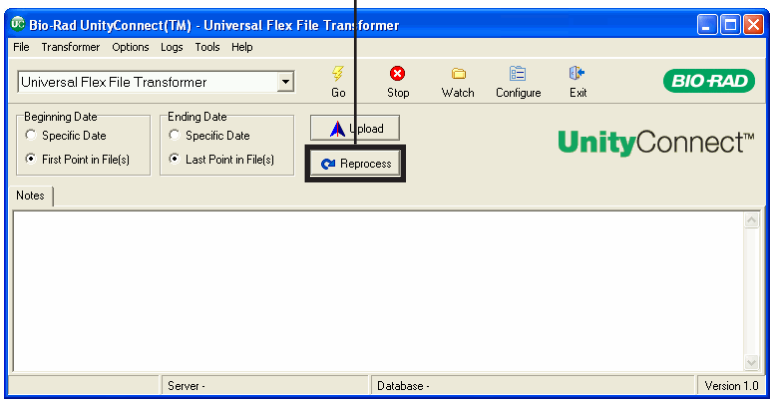
Reprocessing QC Data Files

When UnityConnect is used in silent watch mode, files requiring configuration are stored for reprocessing at a later date. Data already configured are transformed and imported.

Note: An e-mail is sent to the recipients listed on the **Email Notification** tab stating a file is waiting to be reprocessed if configured to do so. See "Configuring E-Mail Notification" on page 74 for more information. If an e-mail notification is not configured, the Reprocess button in UnityConnect indicates a file is ready to be reprocessed.

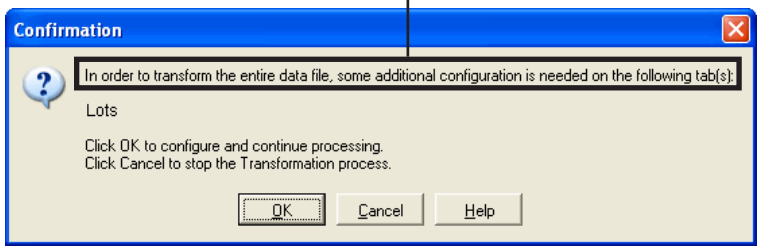
1 Start UnityConnect.

2 Click Reprocess.



A message appears when UnityConnect finds the item(s) requiring configuration.

3 Read the note carefully.



Important: This is not an error message. The message is simply stating there are new codes in the QC data file that have not been matched to Bio-Rad codes in your QC data management software.

4 Click OK.

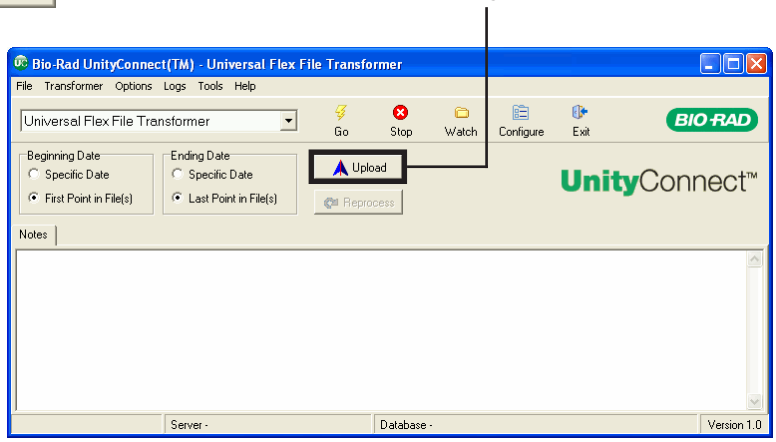
5 Log in to your QC data management software database if prompted.

UnityConnect presents the tab requiring configuration.

6 Configure all tabs UnityConnect presents.

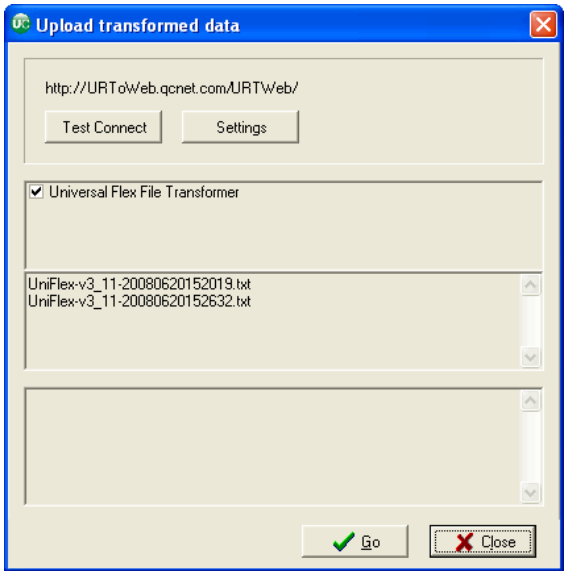
Tip: See Chapter 10, “New Configuration in UnityConnect” for more information.

7 Click Upload after the file has completed transforming.



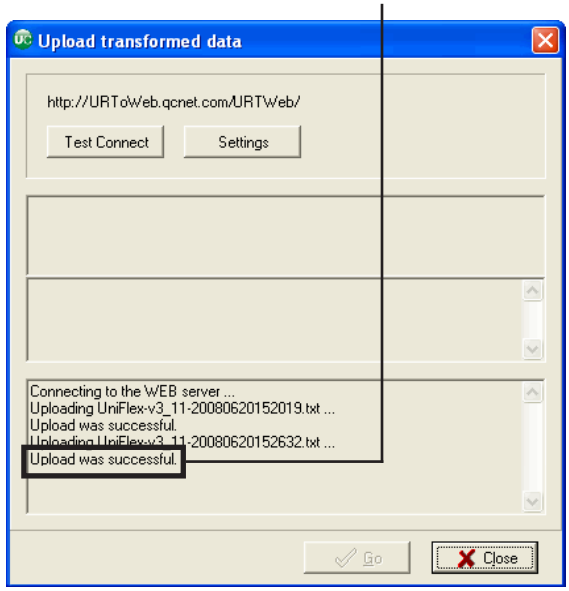
Note: Automatic upload does not occur when reprocessing QC data files even if UnityConnect is configured for automatic import.

The **Upload transformed data** dialog box appears.



8 Click Go .

A message appears when the upload completes successfully.



9 Click Close .

Best Practices—Review the Number of Data Records Transformed

Always review and note the number of data records transformed. Customers who transform data on a regular basis at the same time each month will become familiar with the typical number of data points in their transformed QC data file. For example, if your transformed file normally contains 10,000 data points (records) for the month but the message indicates 3,000 records, further investigation may be required to ensure the QC data file you transformed contained all of your QC data for the month.

Working with Multiple QC Data Files

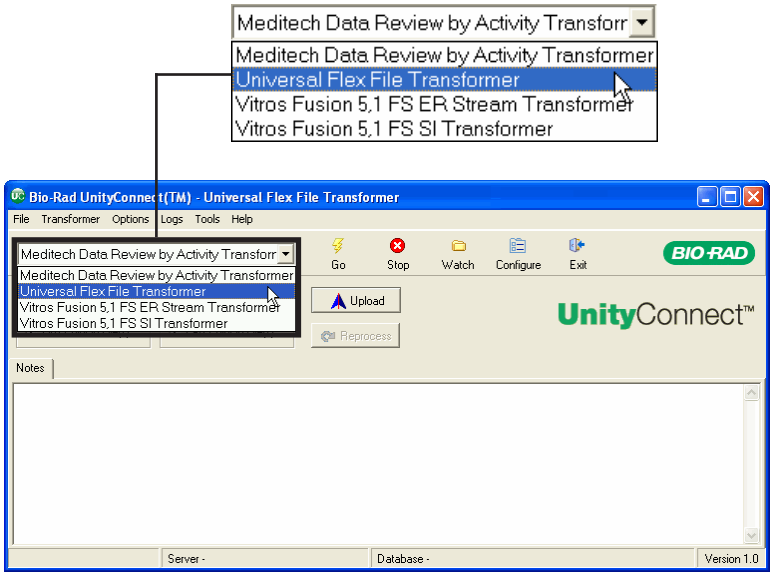
Important: Due to the unique configuration of your customized UnityConnect software, talk to your Bio-Rad representative about the best process for transforming multiple QC data files for your laboratory.

Some Laboratory Information Systems (LIS) output multiple files when creating QC data files. One example is the Orchard LIS. UnityConnect can be configured to automatically process one directory containing multiple files which simplifies the transformation process.

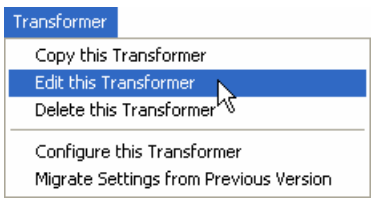
Configuring UnityConnect to Transform a Directory of Files

Note: You must perform a one-time configuration for each transformer.

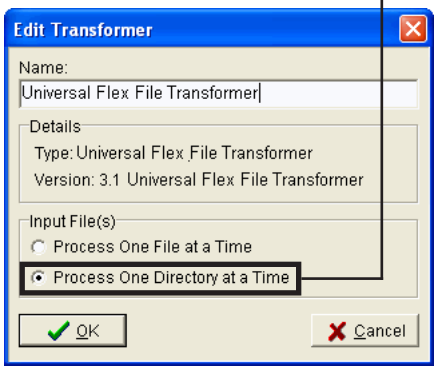
1 Select the transformer you want to set up to process a directory of files.



2 Click the Transformer menu and then click Edit this Transformer.



3 Select the **Process One Directory at a Time** option.

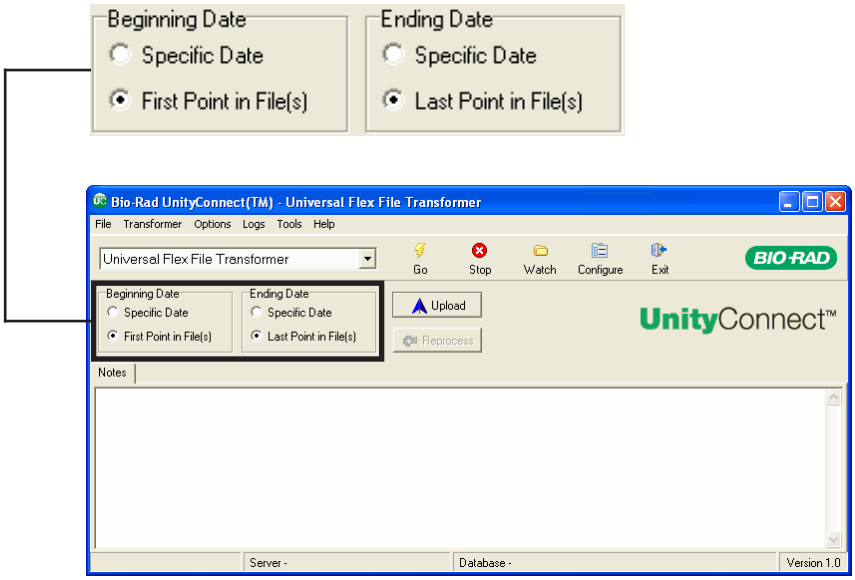


4 Click OK .

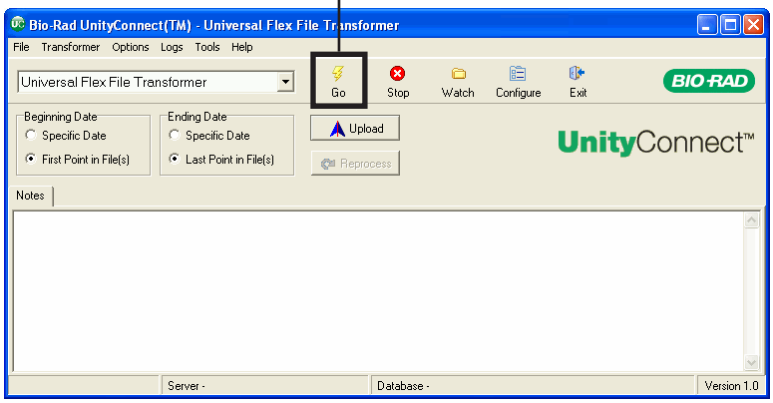
Transforming a Directory of Files

1 Open UnityConnect.

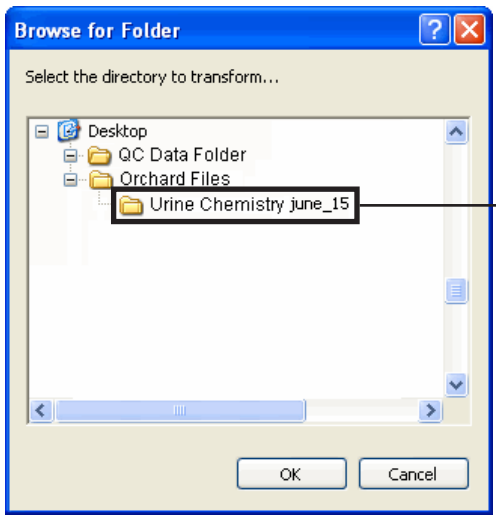
2 Set the date range for the data to transform. Data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.



3 Click Go.



4 Select the directory (or folder) containing the multiple data files to transform.



5 Click OK.

Best Practices–Review the Number of Data Records Transformed

Always review and note the number of data records transformed. Customers who transform data on a regular basis at the same time each month will become familiar with the typical number of data points in their transformed QC data file. For example, if your transformed file normally contains 10,000 data points (records) for the month but the message indicates 3,000 records, further investigation may be required to ensure the QC data file you transformed contained all of your QC data for the month.

CHAPTER 10

New Configuration in UnityConnect

In This Chapter

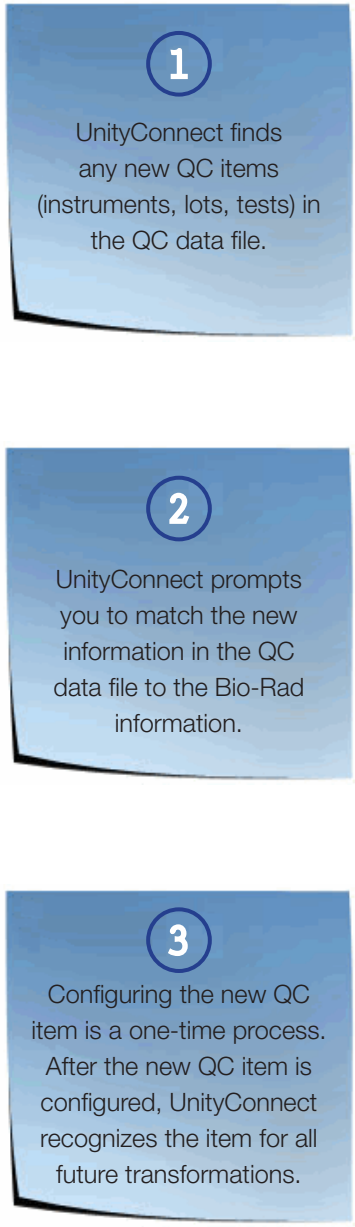
Overview

Bio-Rad customized the UnityConnect software based on all the information in the original QC data file provided by your laboratory. After the initial configuration is complete, new configuration is required only if a new QC item (such as an instrument, lot, or test) is added to the QC data file.

Important: Configuring information in UnityConnect varies according to the information in your QC data file and the specifics of your customized UnityConnect software. Therefore, the example configuration information shown in this chapter may not be identical.

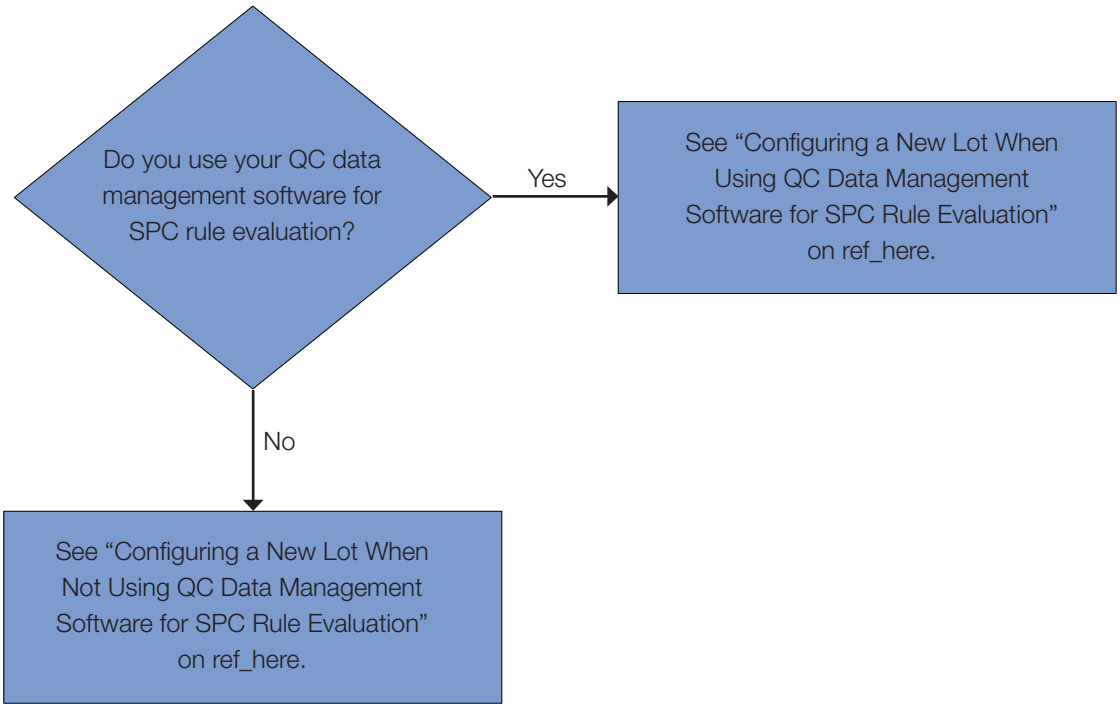
UnityConnect processes the QC data file and, if necessary, displays messages prompting you to match or configure the new information in the QC data file with the information in your Unity software. UnityConnect automatically determines the information needing configuration and presents the appropriate tab where the configuration can be completed.

Summary of New Configuration



Configuring a New Lot

The process for configuring a new lot depends on your use of your QC data management software for SPC rule evaluation.



Configuring a New Lot When Using QC Data Management Software for SPC Rule Evaluation

Switching to a new lot of control material is one of the most common reasons to complete new configuration in UnityConnect. Configuring UnityConnect for a new lot is a simple two-step process.

1 **Duplicate the current lot in your QC data management software**.

2 **Complete new configuration in UnityConnect**.

Duplicating a Lot in Your QC Data Management Software

> **Tip**: Duplicating a lot is helpful when you switch to a new control material lot number. All tests under the old lot are duplicated.

See the appropriate section according to your software for information on duplicating a lot:

- Unity Desktop (page 165)
- Unity Real Time (page 166)
- UnityWeb 2.0 (page 166)
- Unity Real Time online (page 167)

Duplicating a Lot in Unity Desktop

1 Use one of the following methods to open the **Lot** dialog box:

- On the toolbar, click 

.
- Click the **Select** menu and then click **Lot**.
- Press **CTRL+F3**.

The **Lot** dialog box appears.

2 Select the lot you want to duplicate in the **Open lots** list.

3 Click **Duplicate**.

The **Duplicate Lot** dialog box appears.

4 Choose the **new lot number**.

> **Note**: The **Fixed means**, **Fixed SDs**, and **Target values for Analytical Goals** options apply only to customers using Westgard (SPC) rules in Unity Desktop.

5 Click **OK**.

The new lot appears in the **Open lots** list.

> **Tip**: The **Fixed means**, **Fixed SDs**, and **Target values for Analytical Goals** options apply only to customers using Westgard (SPC) rules in Unity Desktop.

6 Click **Close**.

7 Continue with the section, “Completing New Configuration in UnityConnect” on page 167.

Duplicating a Lot in Unity Real Time

1 Use one of the following methods to open the **Lot** dialog box:

- On the toolbar, click 

.
- Click the **Select** menu and then click **Lot**.
- Press **CTRL+F3**.

The **Lot** dialog box appears.

2 Select the lot you want to duplicate in the **Open lots** list.

3 Click **Duplicate**.

The **Duplicate Lot** dialog box appears.

4 Choose the **new lot number**.

5 Click **OK**.

The new lot appears in the **Open lots** list.

Tip: The **Fixed means**, **Fixed SDs**, and **Target values for Analytical Goals** options apply only to customers using Westgard (SPC) rules in Unity Real Time.

6 Click **Close**.

7 Continue with the section, “Completing New Configuration in UnityConnect” on page 167.

Duplicating a Lot in UnityWeb 2.0

1 Click the **Configure** tab.

2 Click **Lot**.

3 If you have more than one lab number, make sure the correct number appears in the **Lab number** list.

4 Select the lot number you want to duplicate in the **Open lots** list.

5 Click **Duplicate**.

6 Select the new lot number from the **New lot number** list.

Tip: Only unexpired lot numbers in the same product group appear in the list.

7 Select the appropriate check box for each parameter to duplicate:

- **Fixed means**
- **Fixed SDs**

8 Click **OK**.

The new lot number appears at the bottom of the **Open lots** list.

9 Continue with the section, “Completing New Configuration in UnityConnect” on ref_here.

Dulicating a Lot in Unity Real Time online

1 Click the **Configure** tab.

2 Click **Lot**.

3 Make sure the correct number appears in the **Lab number** list if you have more than one lab number.

4 Select the lot number to duplicate in the **Open lots** list.

5 Click **Duplicate**.

6 Select the new lot number from the **New lot number** list.

> **Note**: Only unexpired lot numbers in the same product group appear in the **Lot number** list.

7 Click **OK**.

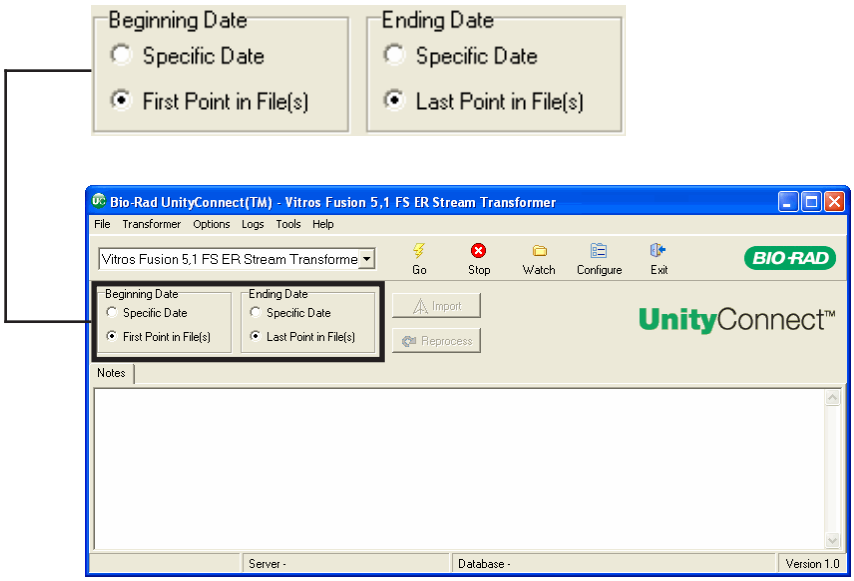
The new lot number appears at the bottom of the **Open lots** list.

8 Continue with the section, “Completing New Configuration in UnityConnect” on ref_here.

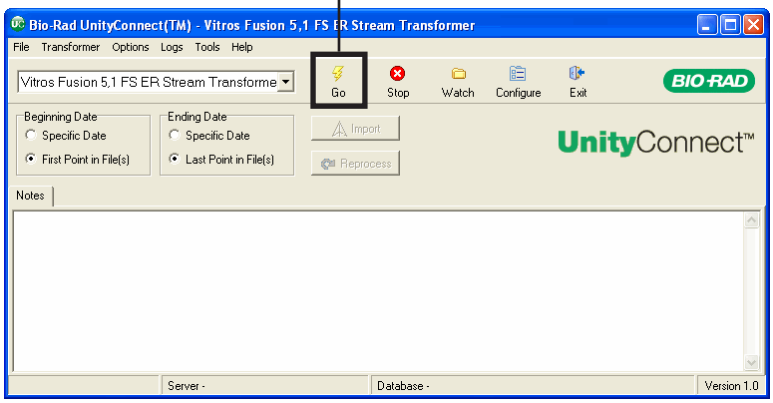
Completing New Configuration in UnityConnect

1 Start UnityConnect.

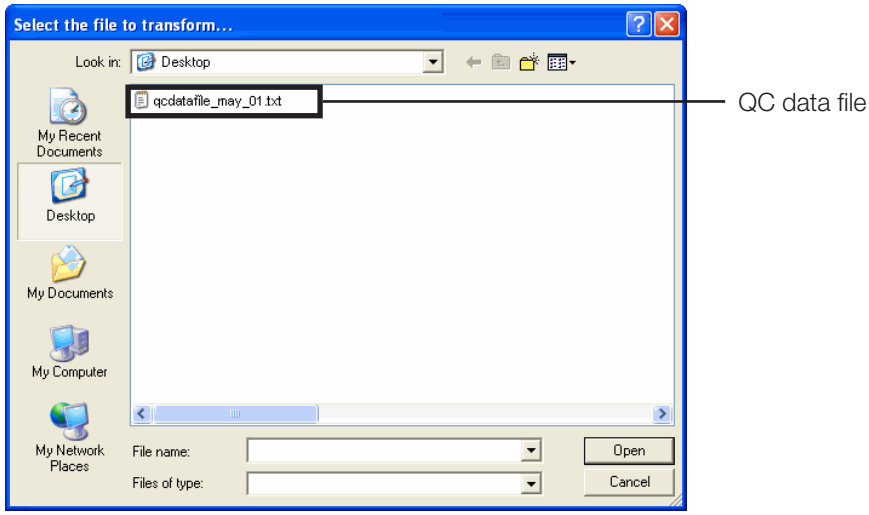
2 Set the date range for the data to transform. Data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.



3 Click Go.

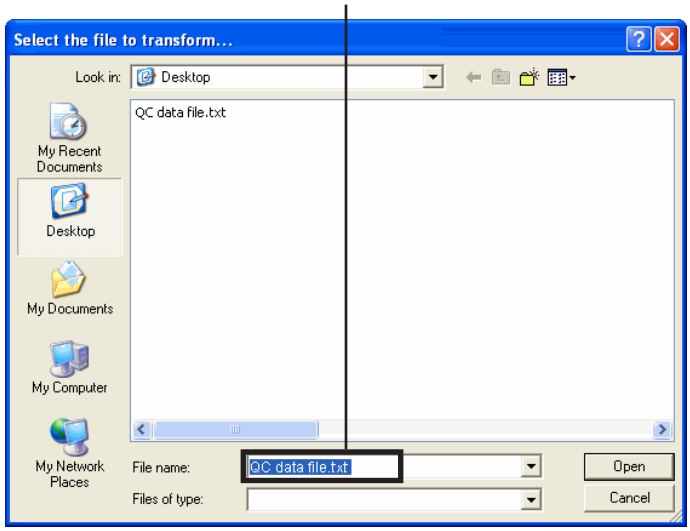


4 Select the QC data file to transform.

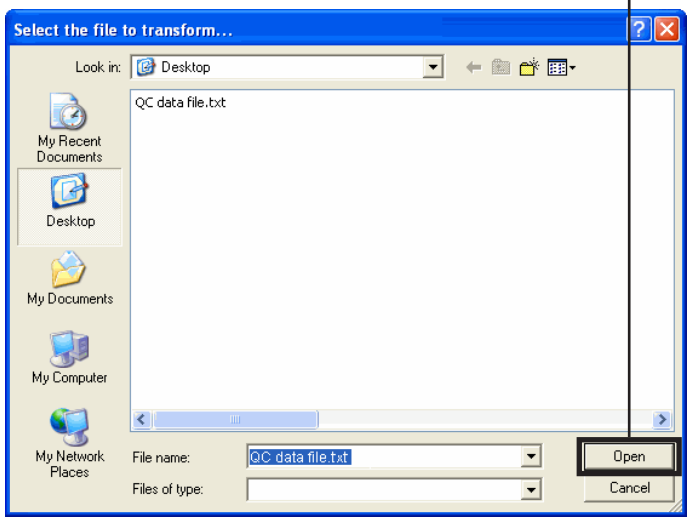


Tip: Bio-Rad recommends giving the QC data file a unique name so it can easily be identified.

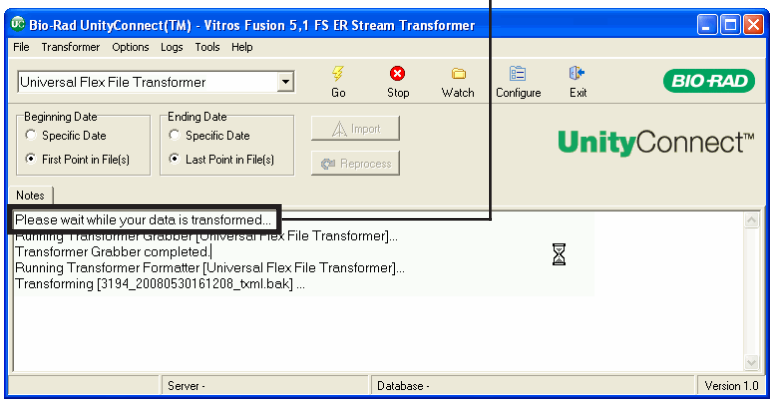
The QC data file name appears here after selecting it.



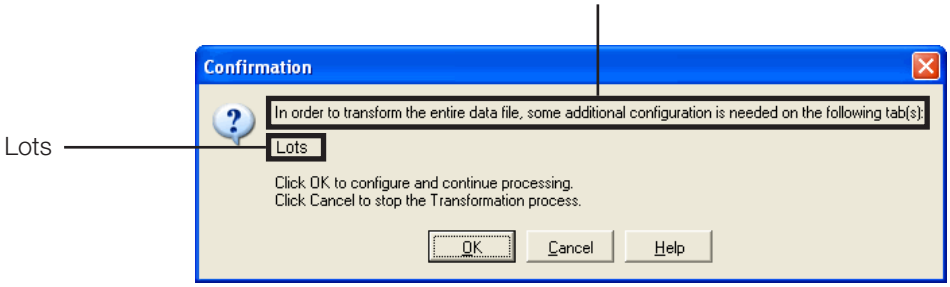
5 Click **Open**.



A message states the transformation is in progress.



6 A message appears when UnityConnect finds the new lot. Read the note carefully.

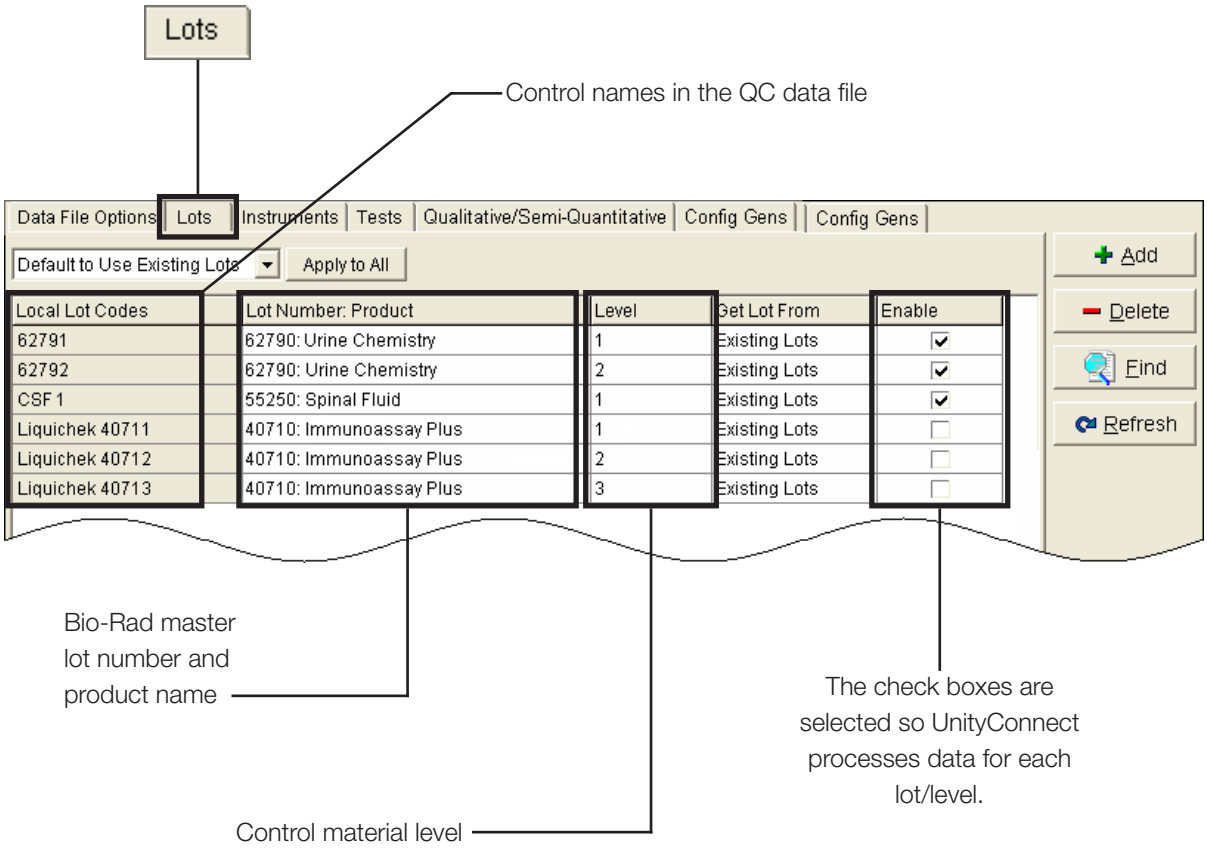


Important: This is not an error message. The message is simply stating there are new codes in the QC data file that have not been matched to Bio-Rad codes in your QC data management software.

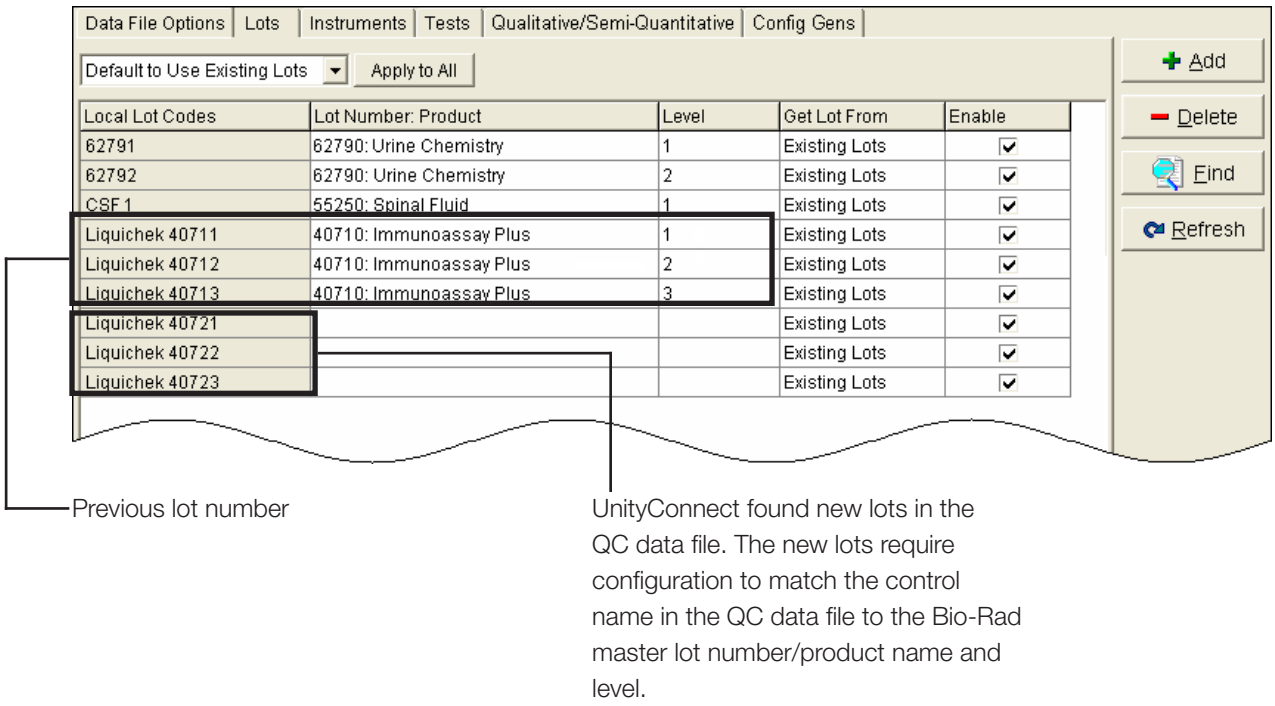
7 Click OK.

8 Log in to your QC data management software database if prompted.

The **Lots** tab appears and shows the following information.



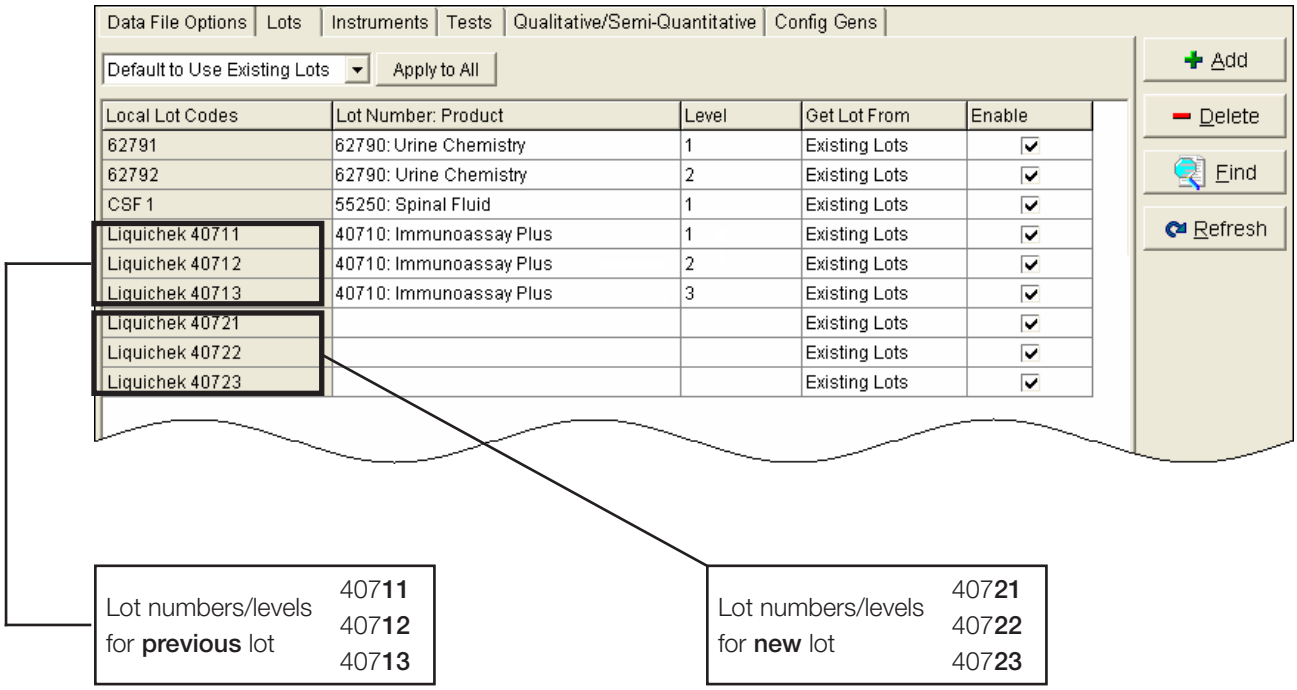
The **Lots** tab also shows the specific lots requiring configuration.



Previous lot number

UnityConnect found new lots in the QC data file. The new lots require configuration to match the control name in the QC data file to the Bio-Rad master lot number/product name and level.

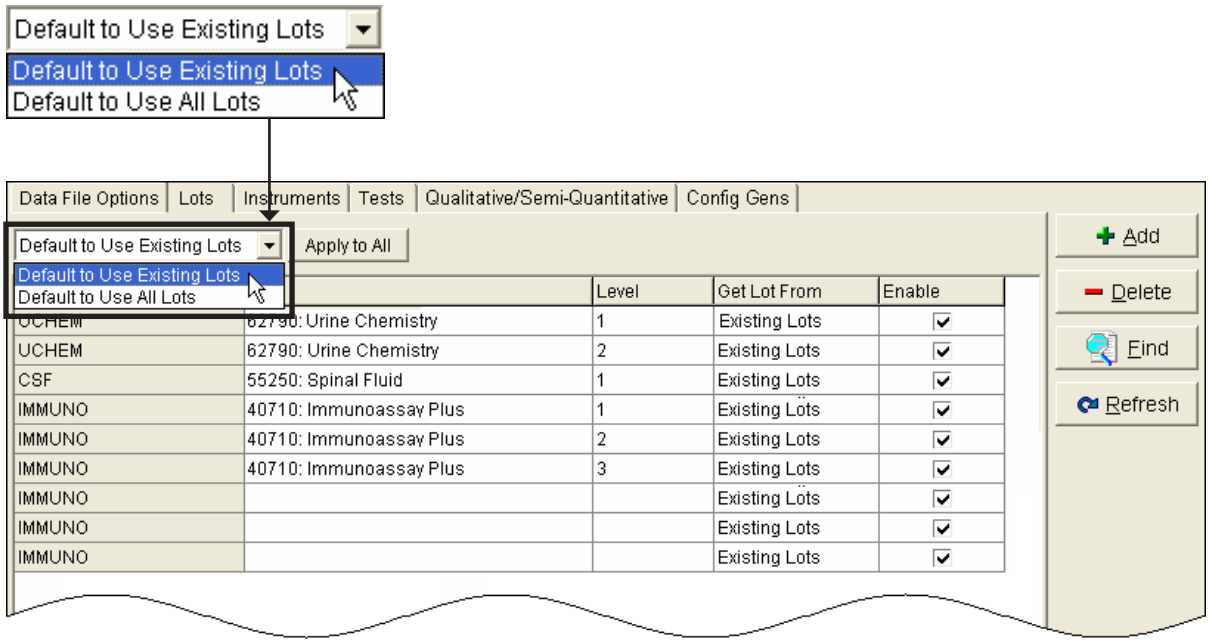
Notice the format of the lot number is consistent from the previous lot number to the new lot number.



Lot numbers/levels for **previous** lot: 40711, 40712, 40713

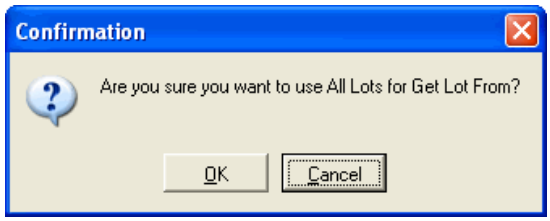
Lot numbers/levels for **new** lot: 40721, 40722, 40723

9 Select **Default to Use Existing Lots**.



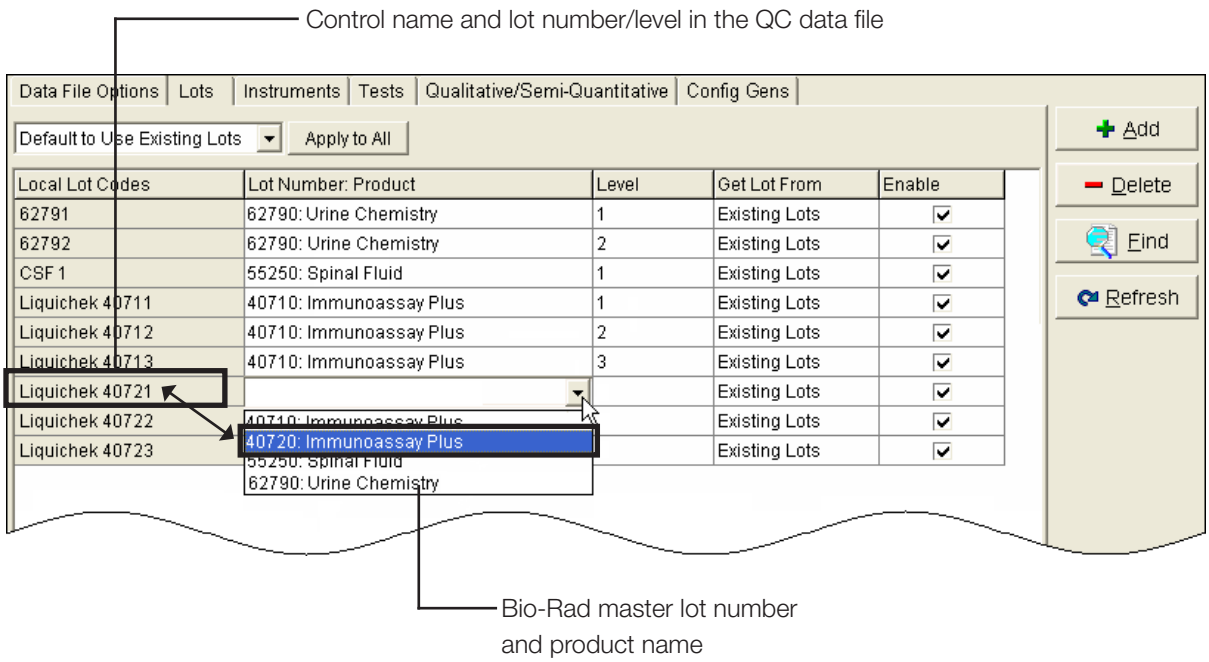
10 Click Apply to All .

A message appears asking for confirmation.



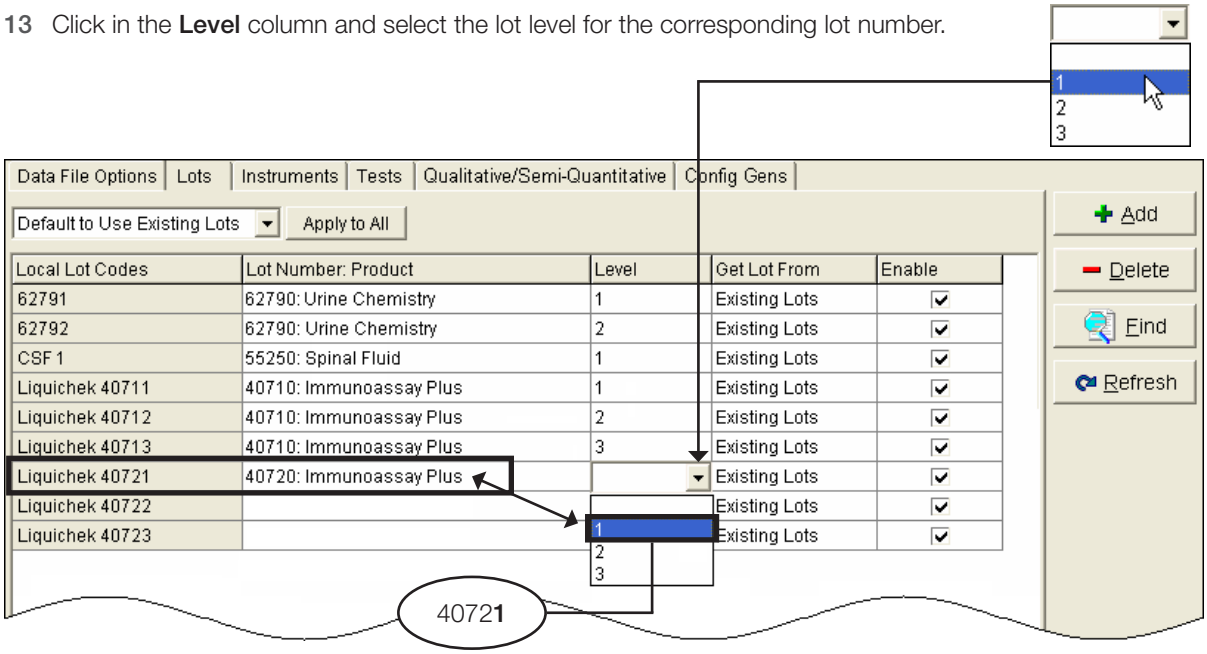
11 Click OK .

12 Click in the first field of the **Lot Number: Product** column requiring configuration and select the Bio-Rad master lot number and product name corresponding to the control in the **Control Name** column and the lot in the **Local Lot Code** column.



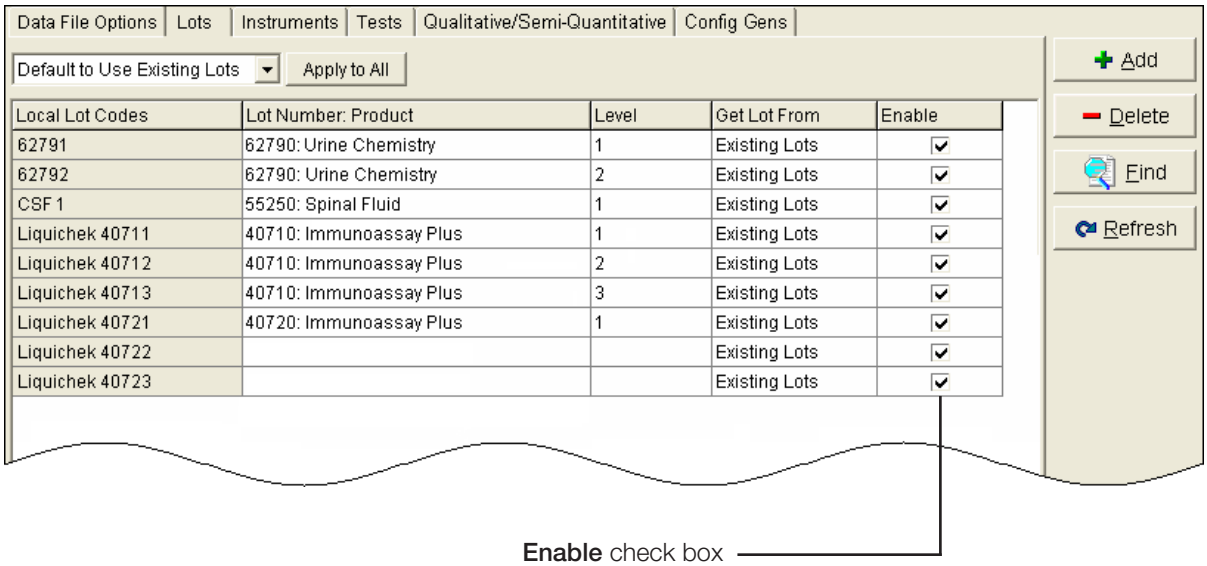
Note: The new lot number will not appear in the list of available lots if the old lot was not duplicated in your QC data management software.

13 Click in the **Level** column and select the lot level for the corresponding lot number.



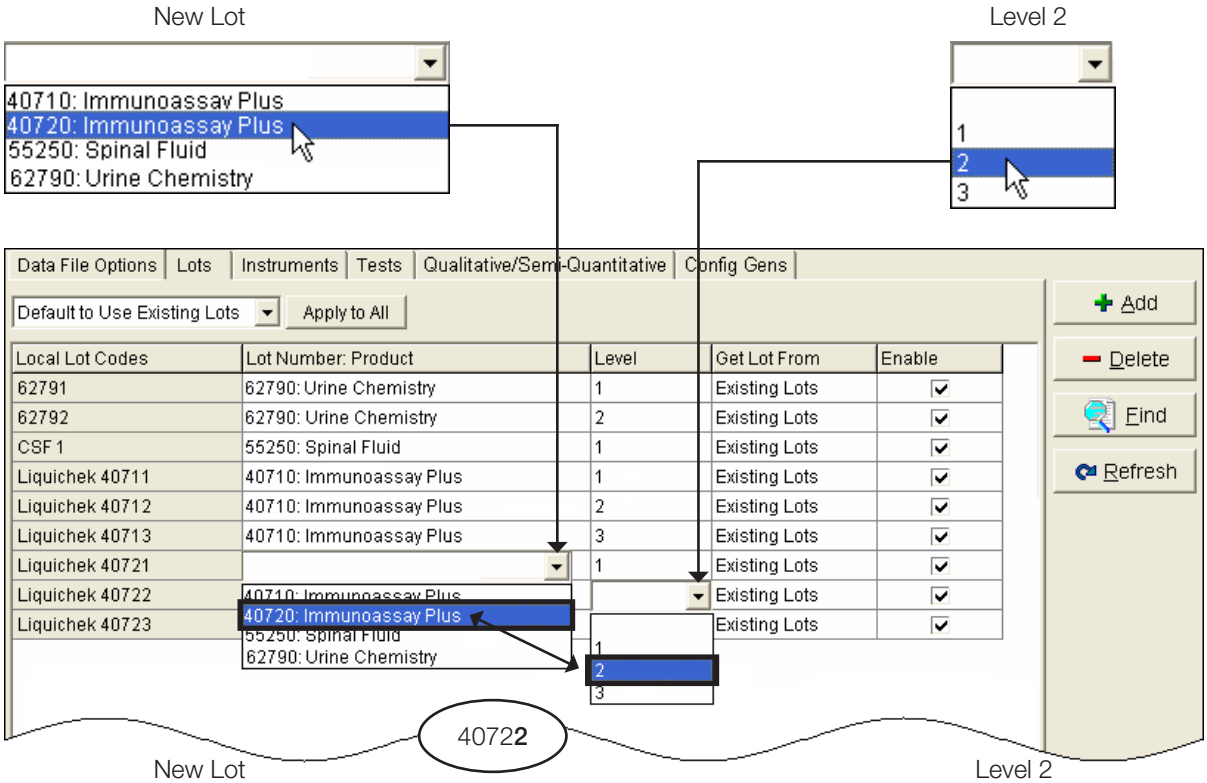
14 Make sure the **Enable** check box is selected for UnityConnect to process data for the lot.

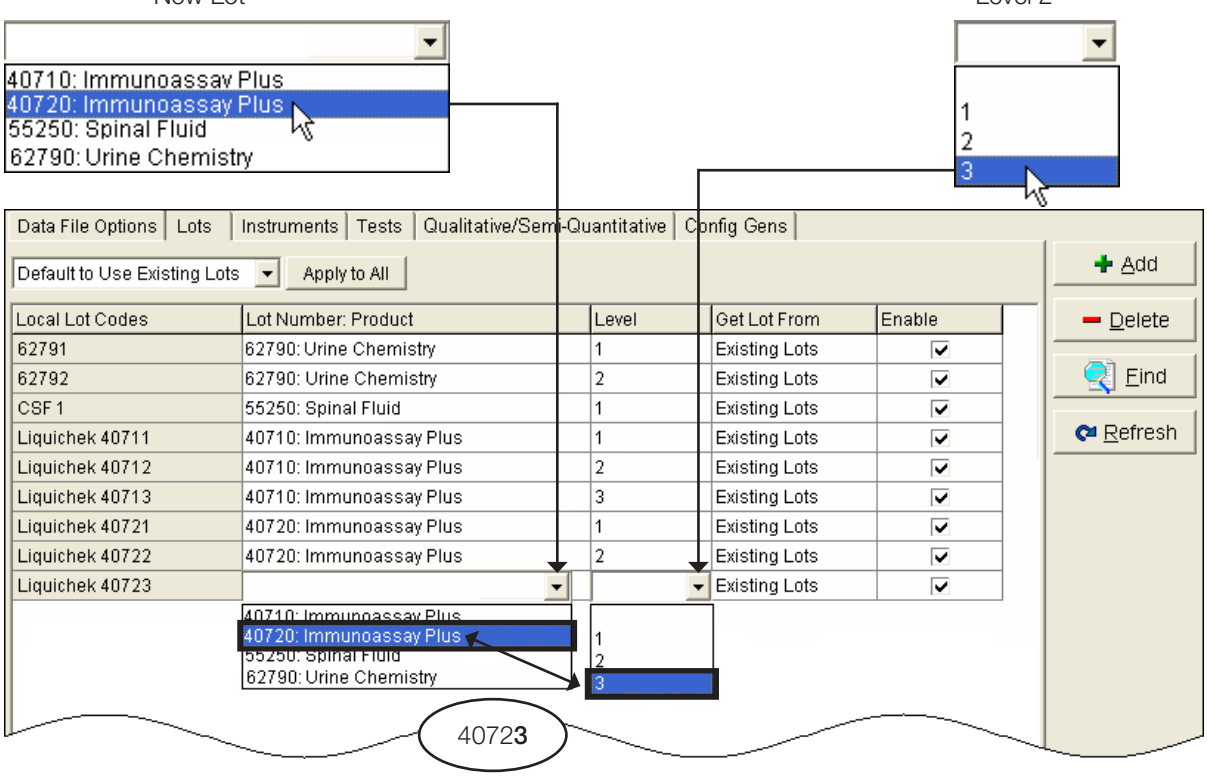
> **Important**: Click the **Enable** check box to clear it and UnityConnect will exclude the lot from current and future transforming. DO NOT delete the row. Deleting the row will cause the lot to appear again for future transforming.



15 Configure any additional lots as necessary.

The following examples show configuring level 2 and level 3 for the new lot.



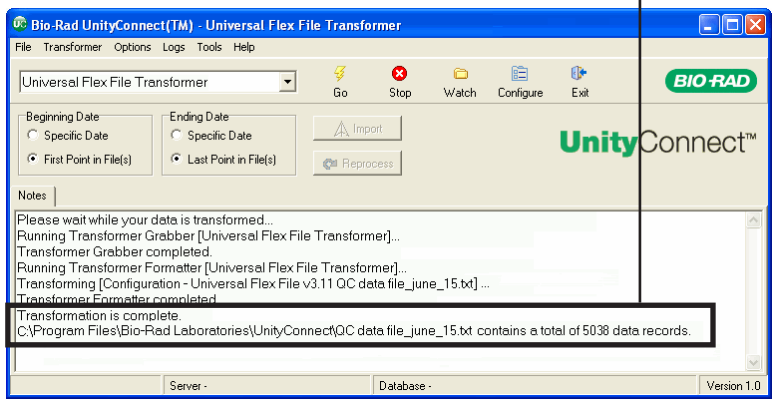


16 Click Save when all lots are configured.

17 Click Close .

UnityConnect now has the information needed to transform data.

A second message appears when transformation is complete.



18 Read the information in the **Notes** section carefully and note the number of data records transformed.

> **Important**: Configuring the new QC item is a one-time process. After the new item is configured, UnityConnect recognizes the item for all future transformations.

Configuring a New Lot When Not Using QC Data Management Software for SPC Rule Evaluation

Switching to a new lot of control material is one of the most common reasons to complete new configuration in UnityConnect. Configuring UnityConnect for a new lot is a simple two-step process.

1 **Configure the Import Settings to automatically create new lots in your QC data management software (this is a one-time setup)**.

2 **Complete new configuration in UnityConnect**.

Configuring Import Settings

Configuring the import options/settings varies according to the type of QC data management software you use. See the appropriate section for more information:

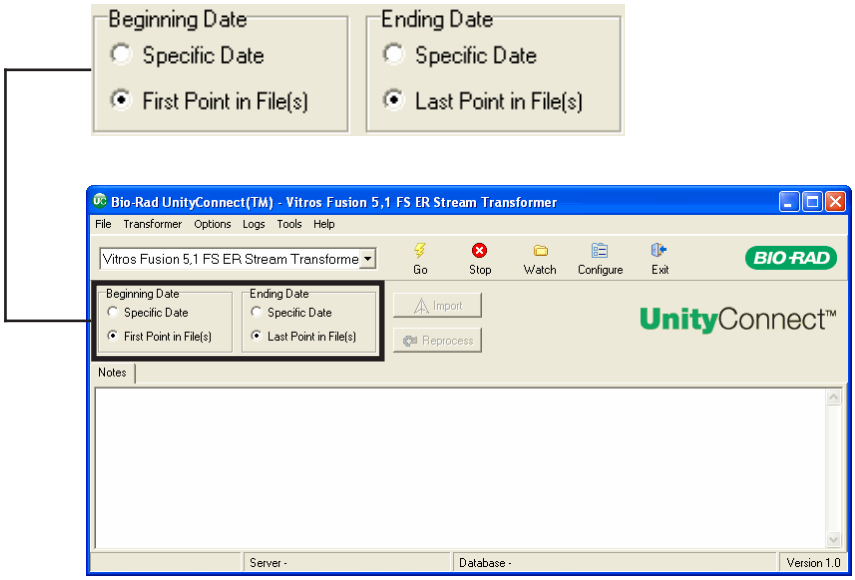
- For Unity Desktop and Unity Real Time: See “Import Options–Not Using QC Data Management Software for SPC Rule Evaluation” on ref_here.
- For UnityWeb 2.0 and Unity Real Time online: See “Import Settings–Not Using QC Data Management Software for SPC Rule Evaluation” on ref_here.

Continue with the following section, “Completing New Configuration in UnityConnect” after configuring the import options/settings.

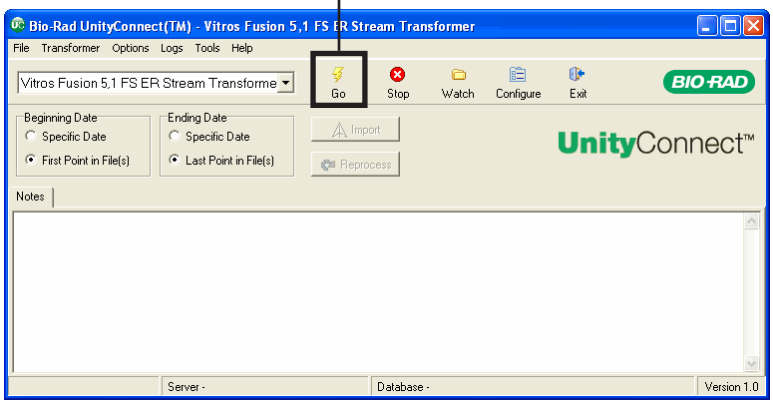
Completing New Configuration in UnityConnect

1 Start UnityConnect.

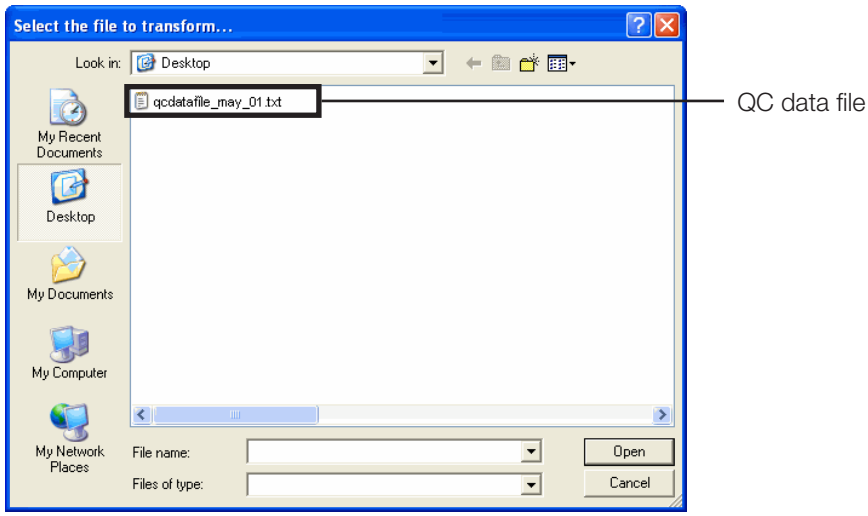
2 Set the date range for the data to transform. Data can be transformed for a particular date range, from the first point in the QC data file to the last point in the QC data file, or a combination of both.



3 Click  .

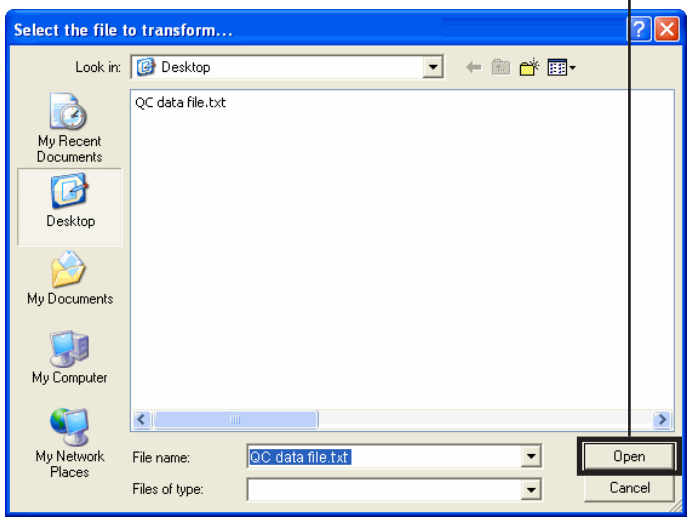


4 Select the QC data file to transform.

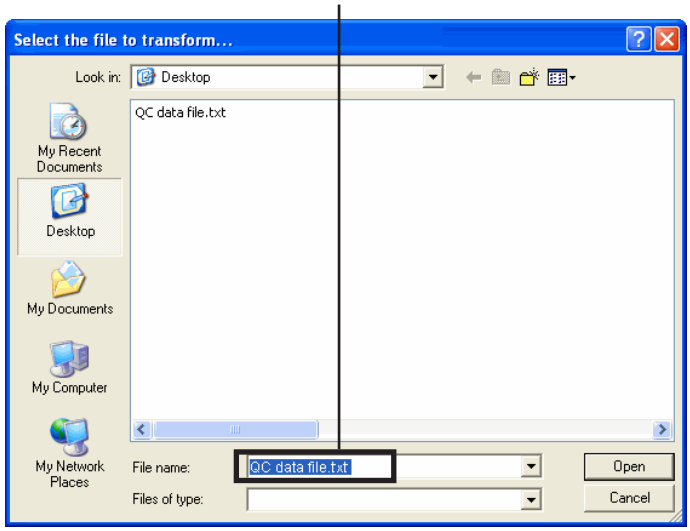


Tip: Bio-Rad recommends giving the QC data file a unique name so it can easily be identified.

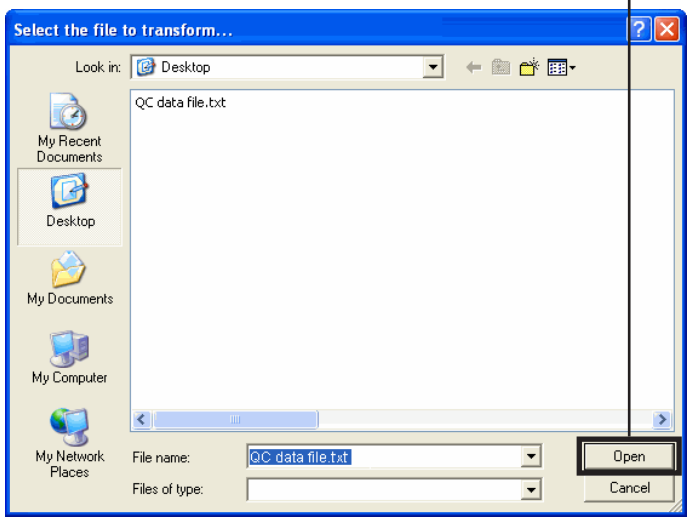
5 Click Open.



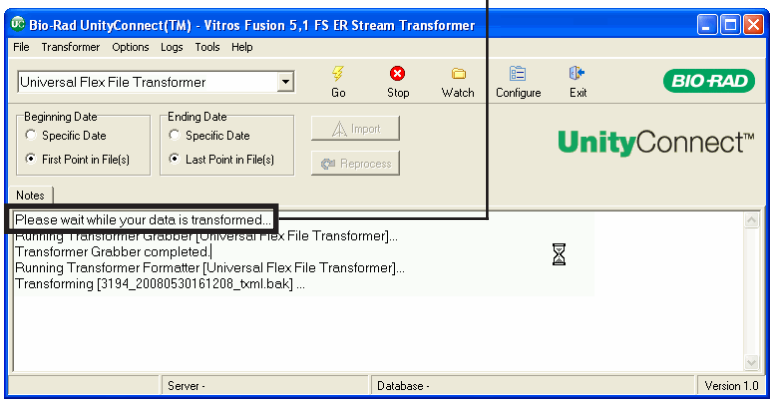
The QC data file name appears here after selecting it.



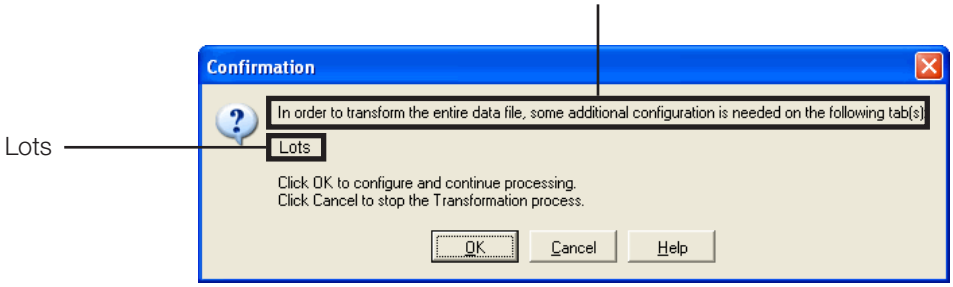
6 Click Open.



A message states the transformation is in progress.



7 A message appears when UnityConnect finds the new lot. Read the note carefully.

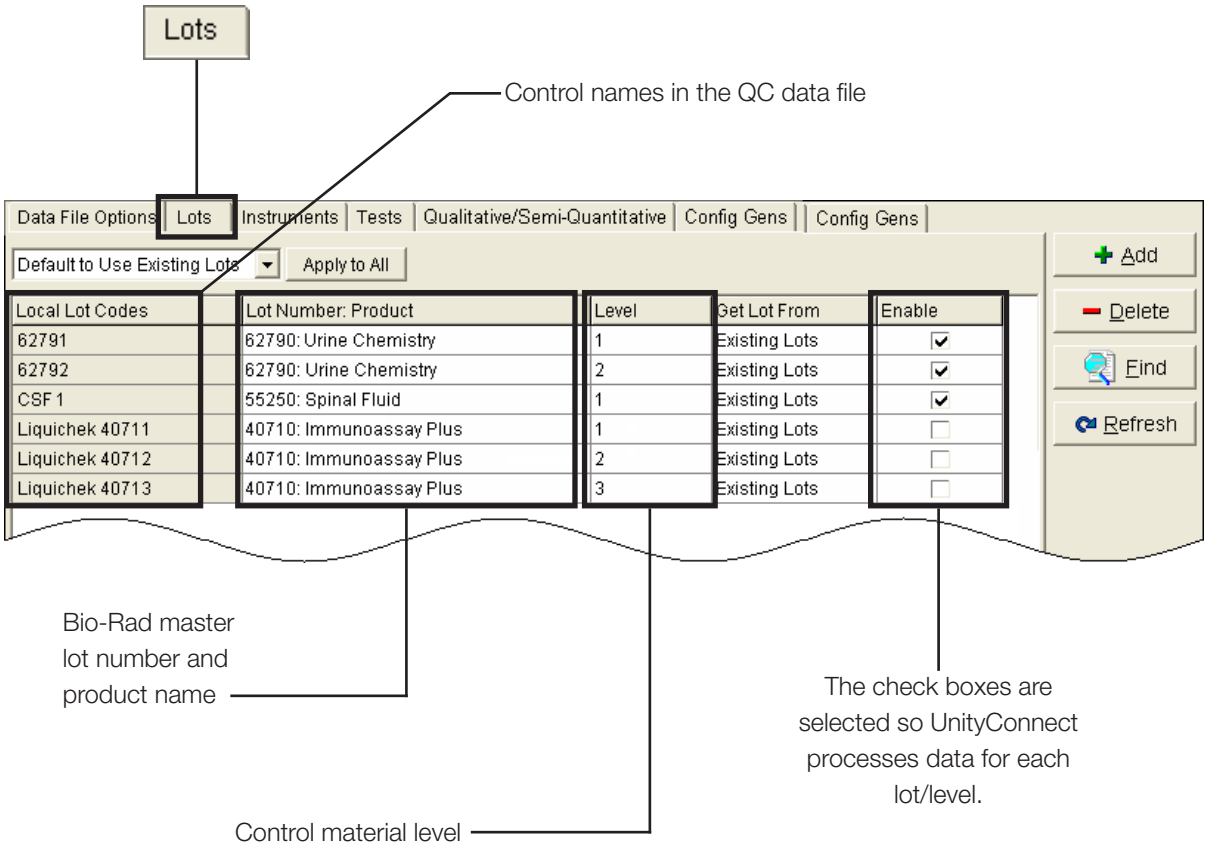


Important: This is not an error message. The message is simply stating there are new codes in the QC data file that have not been matched to Bio-Rad codes in your QC data management software.

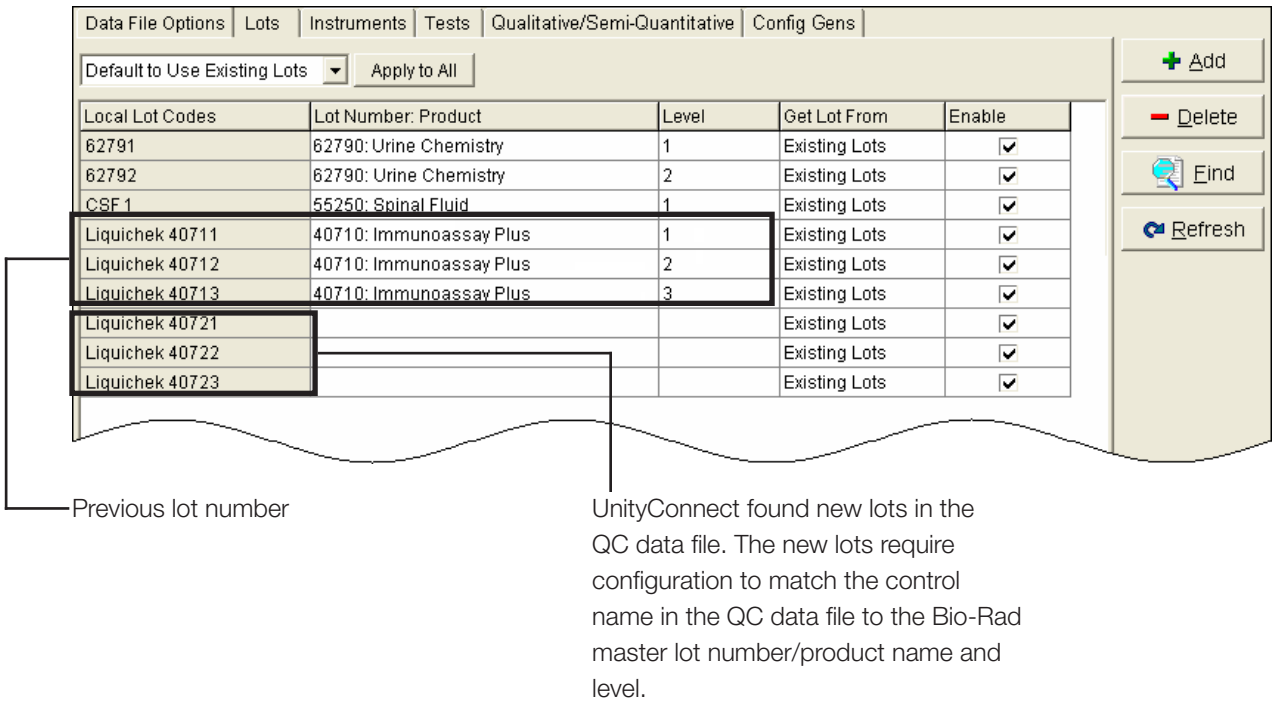
8 Click OK.

9 Log in to your QC data management software database if prompted.

The **Lots** tab appears and shows the following information.



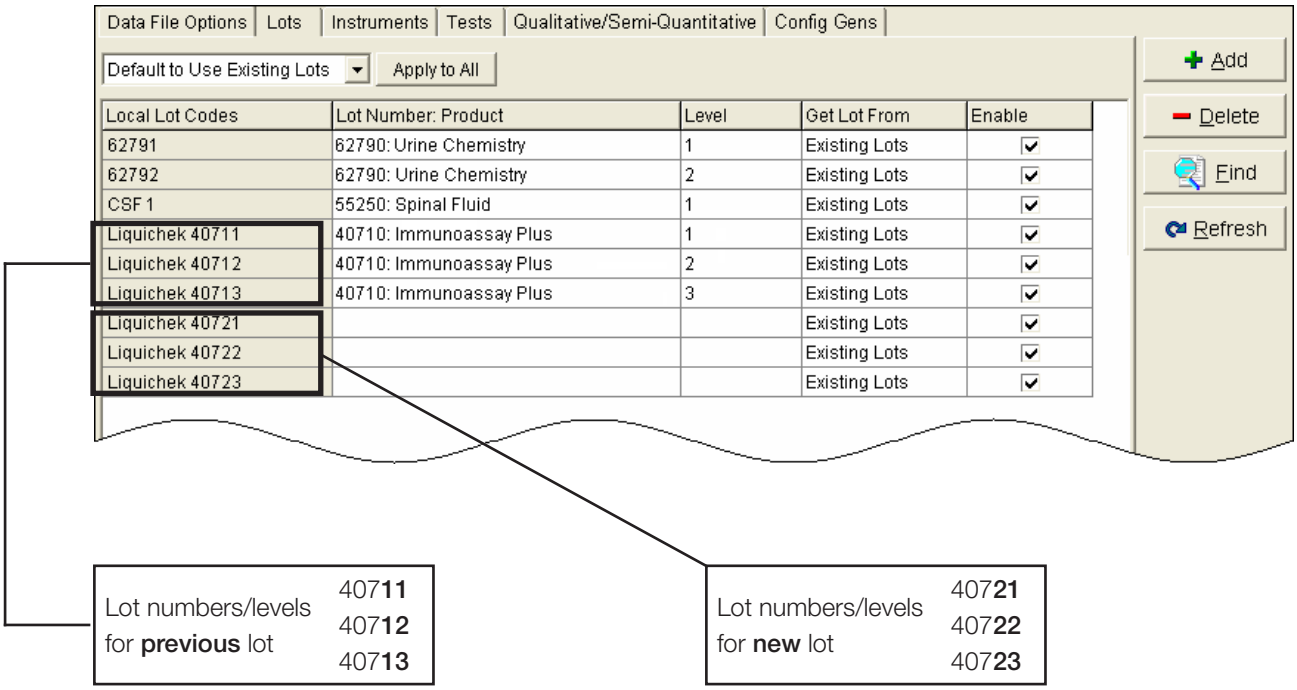
The **Lots** tab also shows the specific lots requiring configuration.



Previous lot number

UnityConnect found new lots in the QC data file. The new lots require configuration to match the control name in the QC data file to the Bio-Rad master lot number/product name and level.

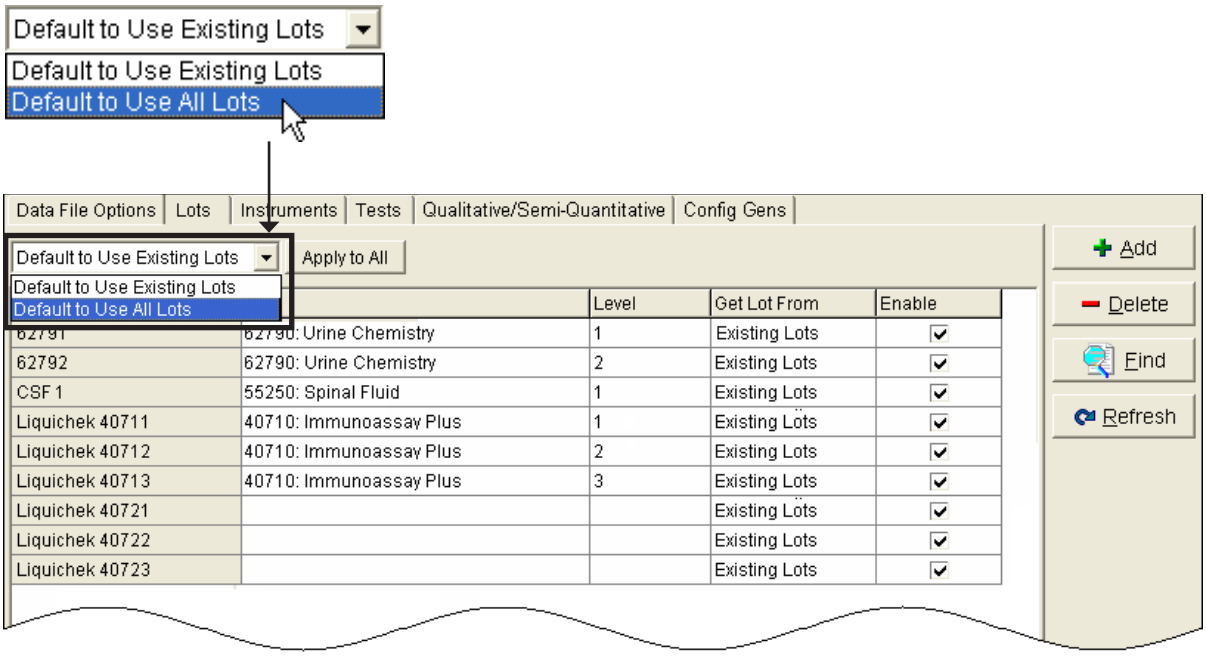
Notice the format of the lot number is consistent from the previous lot number to the new lot number.



Lot numbers/levels for **previous** lot
40711
40712
40713

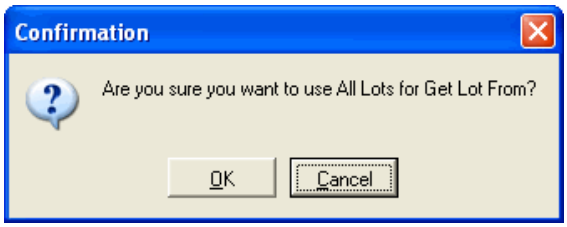
Lot numbers/levels for **new** lot
40721
40722
40723

10 Select **Default to Use All Lots**.



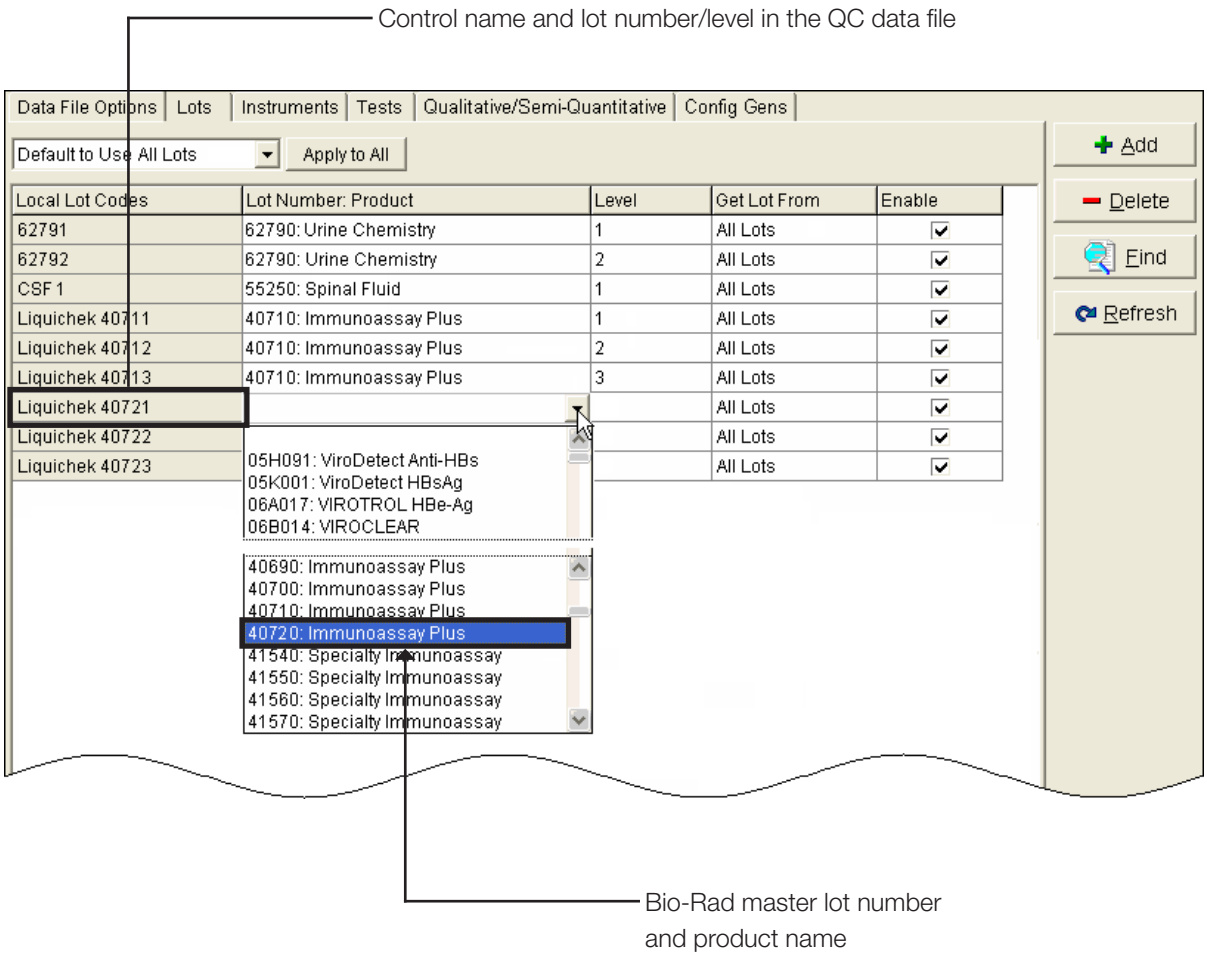
11 Click Apply to All .

A message appears asking for confirmation.

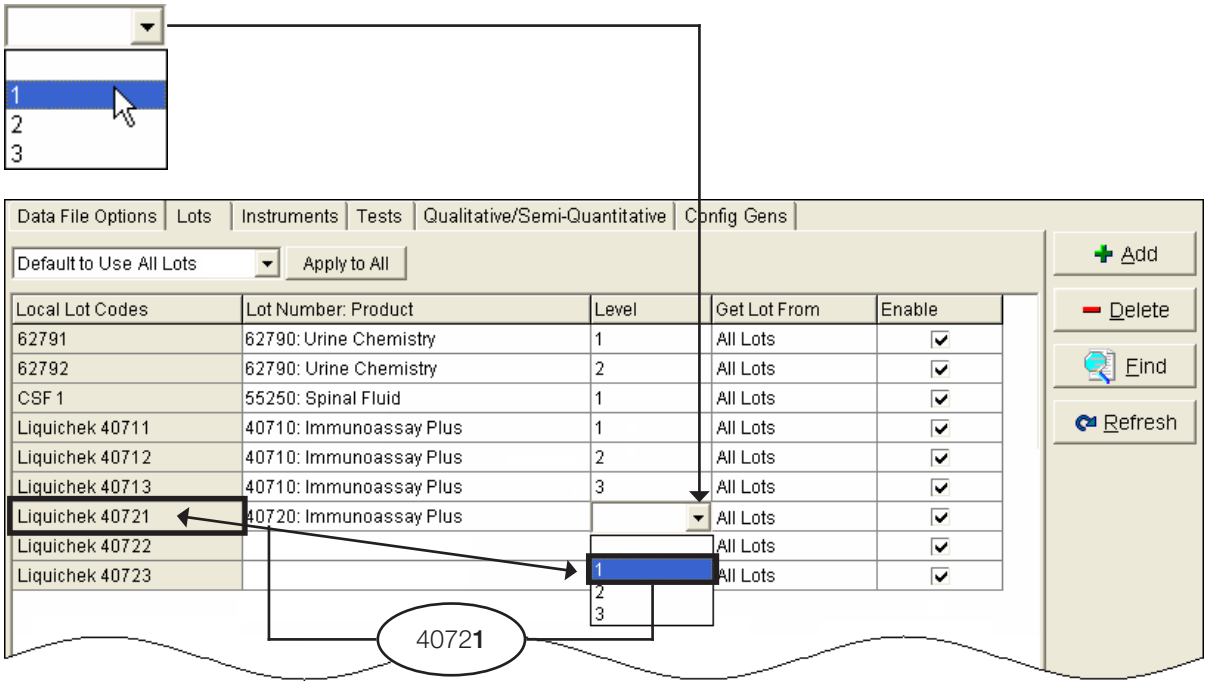


12 Click OK .

13 Click in the first field of the **Lot Number: Product** column requiring configuration and select the Bio-Rad master lot number and product name corresponding to the control in the **Control Name** column and the lot in the **Lot Number** column.

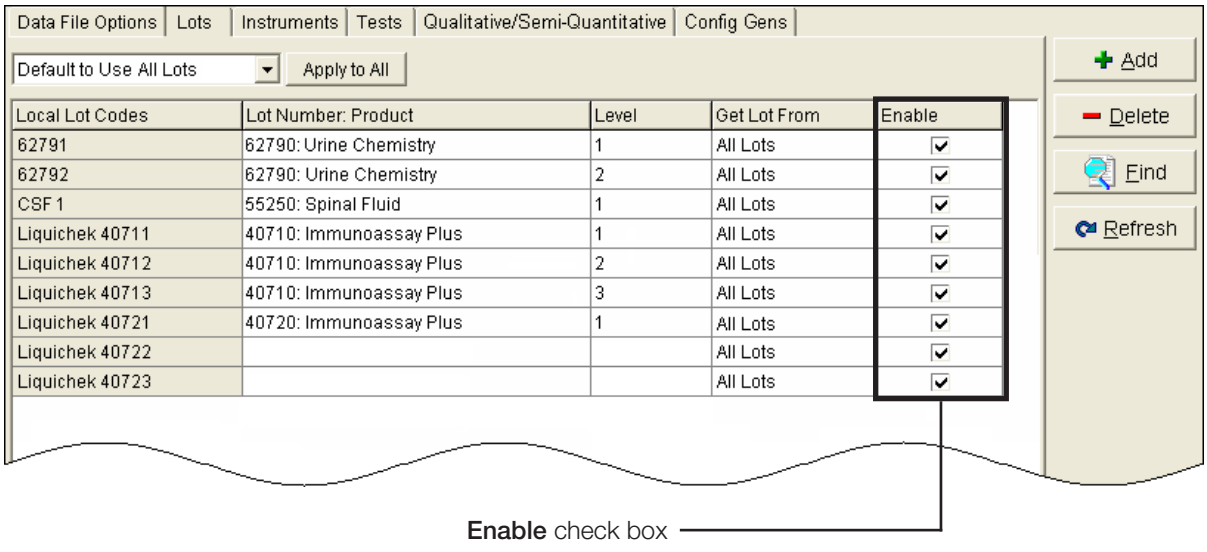


14 Click in the **Level** column and select the lot level for the corresponding lot number.



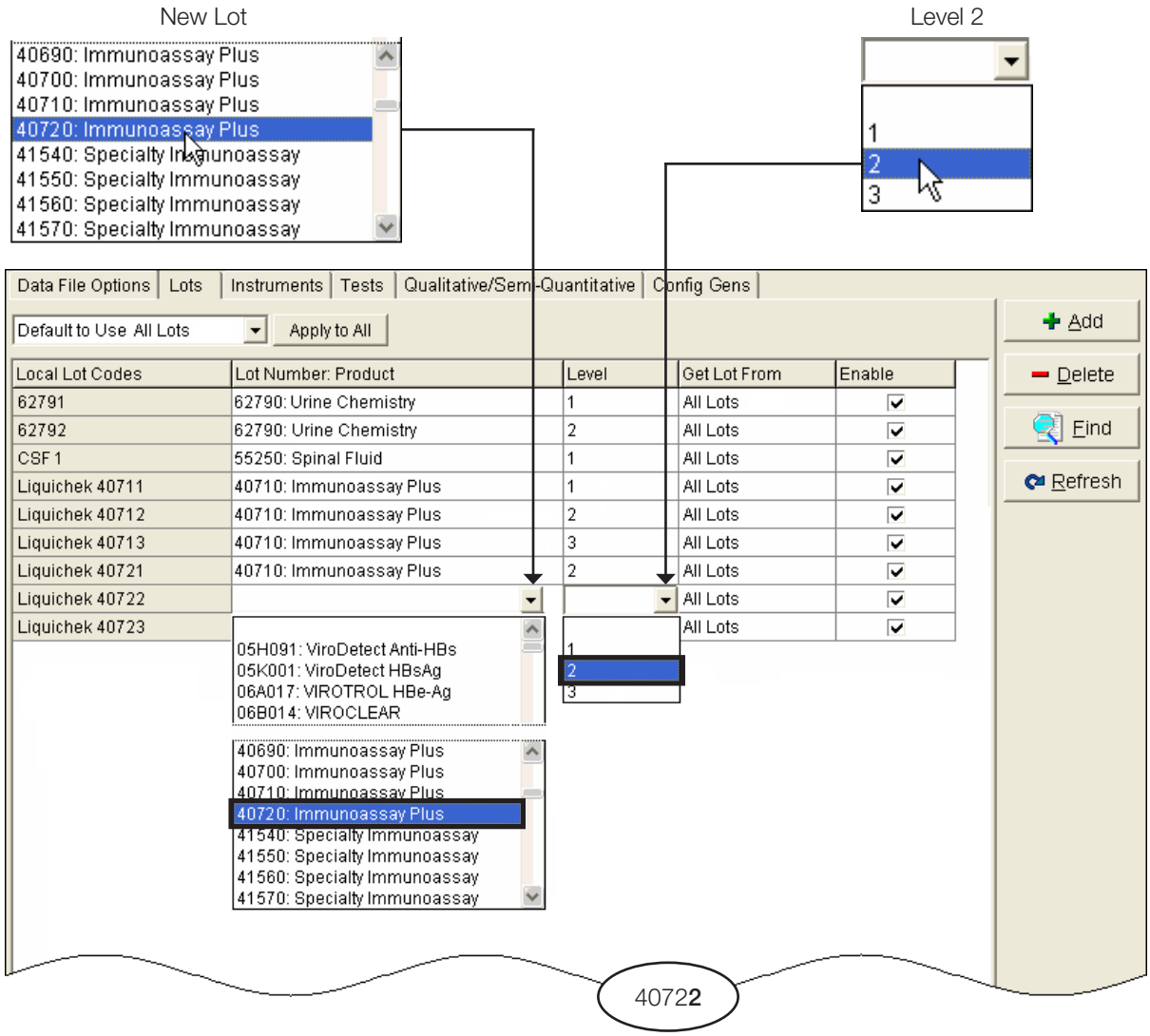
15 Make sure the **Enable** check box is selected for UnityConnect to process data for the lot.

> **Important**: Click the **Enable** check box to clear it and UnityConnect will exclude the lot from current and future transforming. DO NOT delete the row. Deleting the row will cause the lot to appear again for future transforming.

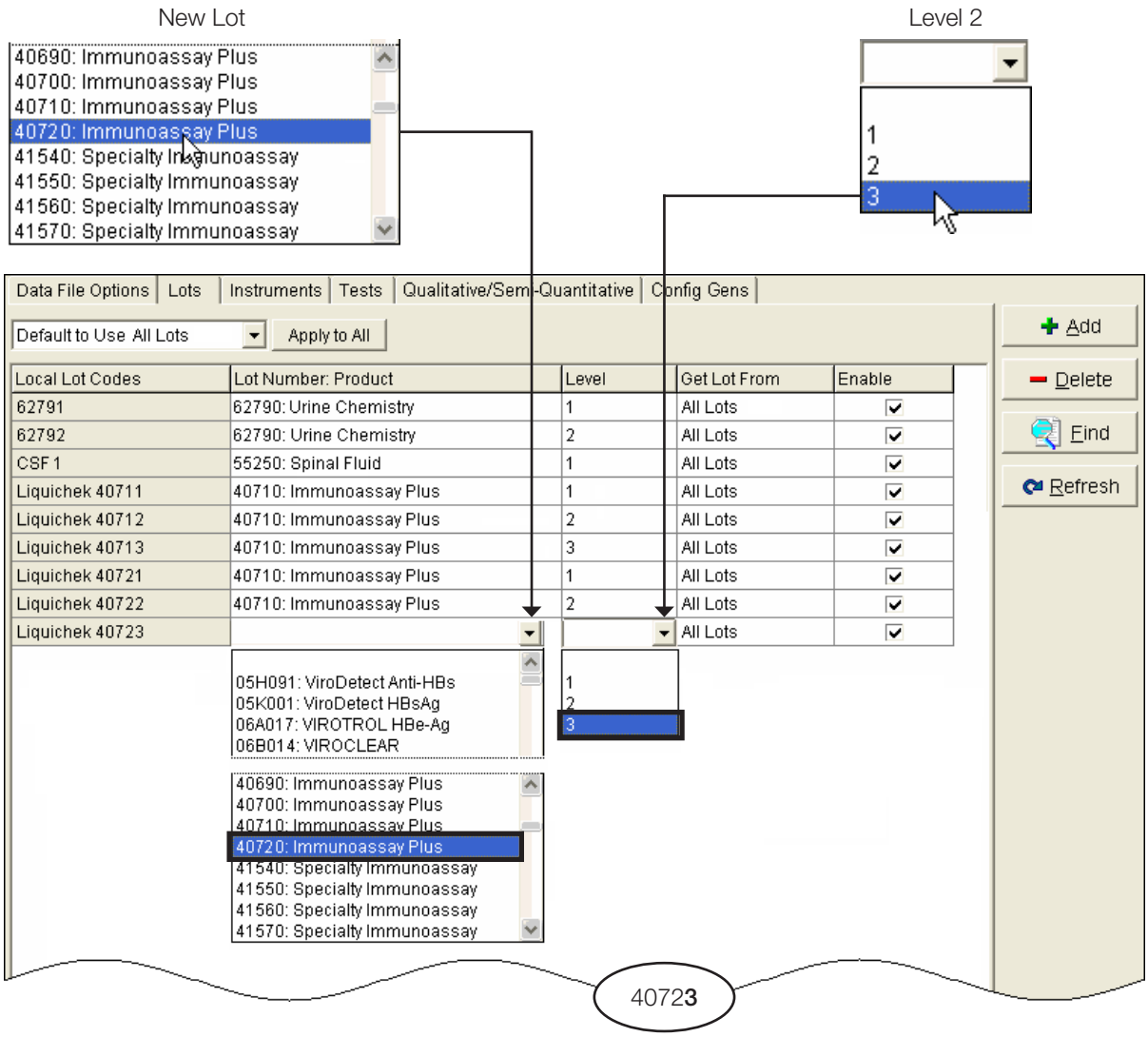


16 Configure any additional lots as necessary.

The following example shows configuring level 2 for the new lot.



The following example shows configuring level 3 for the new lot.

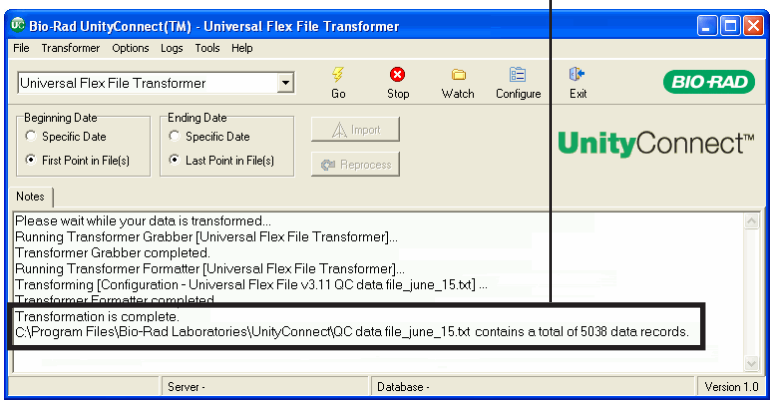


17 Click Save when all lots are configured.

18 Click Close .

UnityConnect now has the information needed to transform data.

A message indicates transformation is complete.



19 Read the information in the **Notes** section carefully and note the number of data records transformed.

Important: Configuring the new QC item is a one-time process. After the new item is configured, UnityConnect recognizes the item for all future transformations.

Other Types of Configuration

The following are possible types of information that may require configuration in UnityConnect:

- Data file options

  See “Configuring New Data File Options” on ref_here.

- Instruments

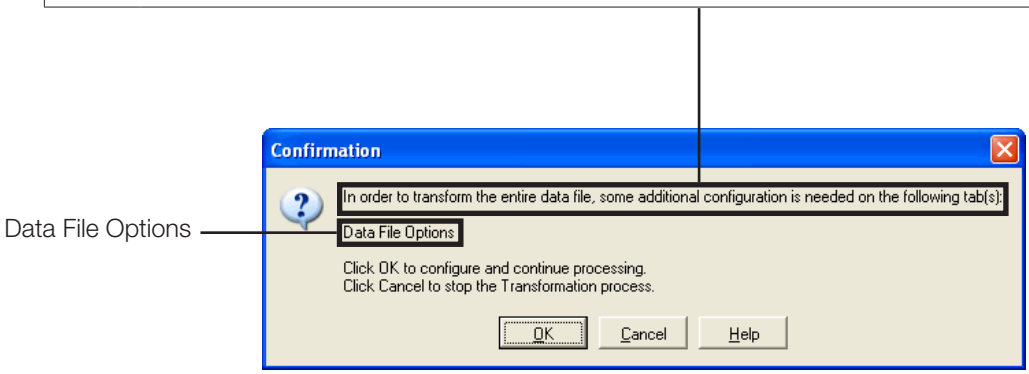
  See “Configuring a New Instrument” on ref_here.

- Tests

  See “Configuring a New Test” on ref_here.

Configuring New Data File Options

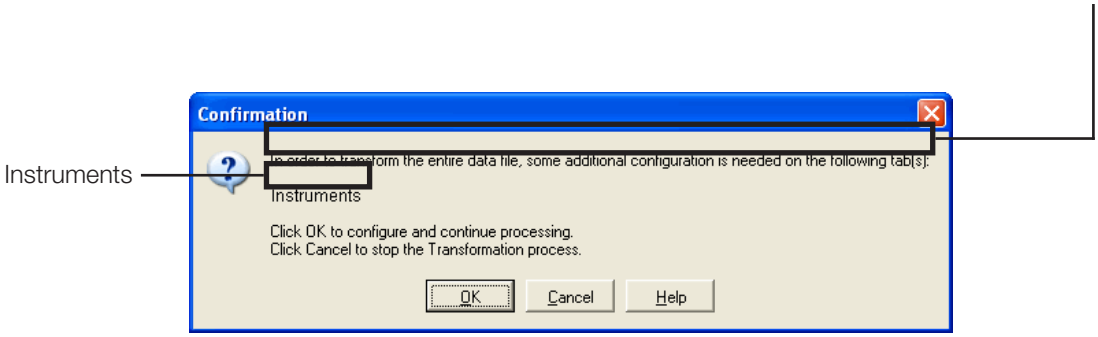
Important: Due to the unique configuration of your customized UnityConnect software, talk to your Bio-Rad representative if you see the following message.



Configuring a New Instrument

Important: Configuring information in UnityConnect varies according to the information in your QC data file and the specifics of your customized UnityConnect software. Therefore, the example configuration information shown in this chapter may not be identical.

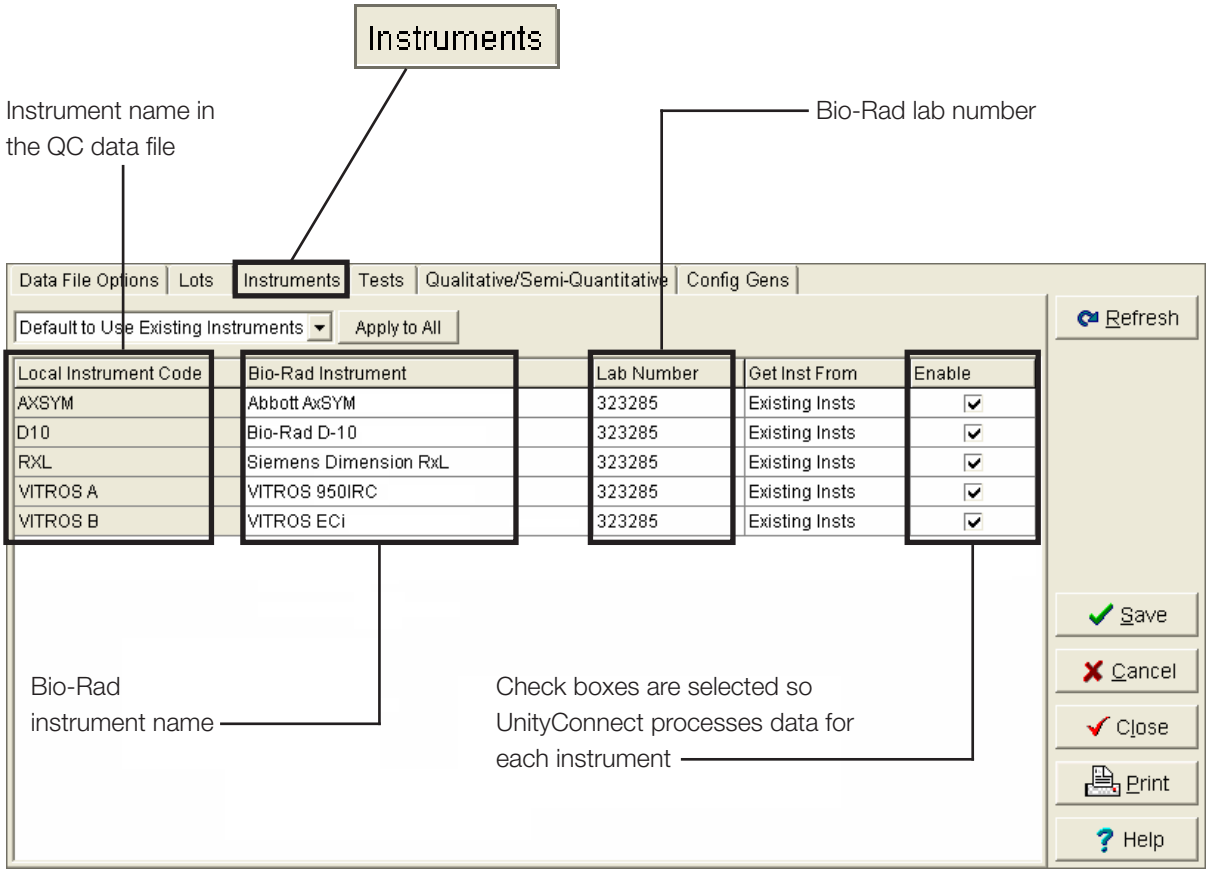
As UnityConnect processes the QC data file, a message appears when UnityConnect finds a new instrument.



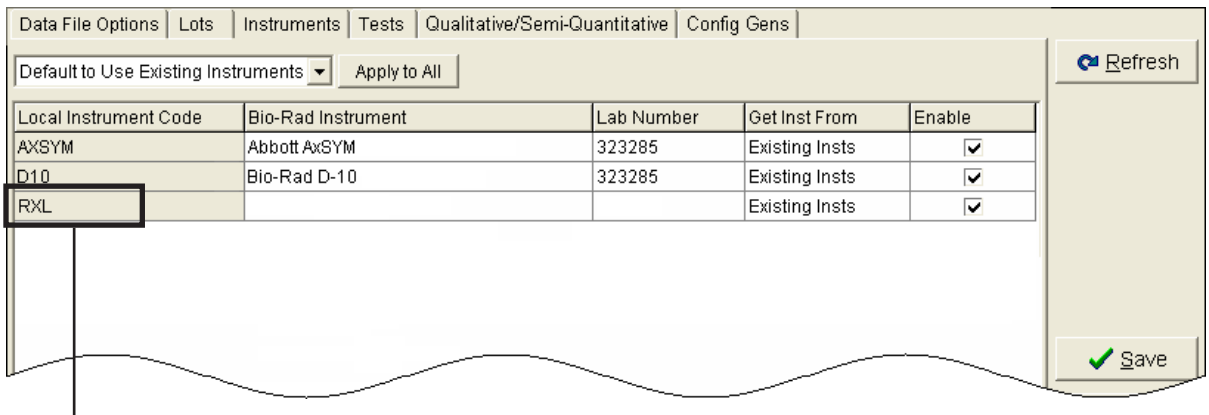
Important: This is not an error message. The message is simply stating there are new codes in the QC data file that have not been matched to Bio-Rad codes in your QC data management software.

1 Click OK .

The **Instruments** tab appears and shows the following information.

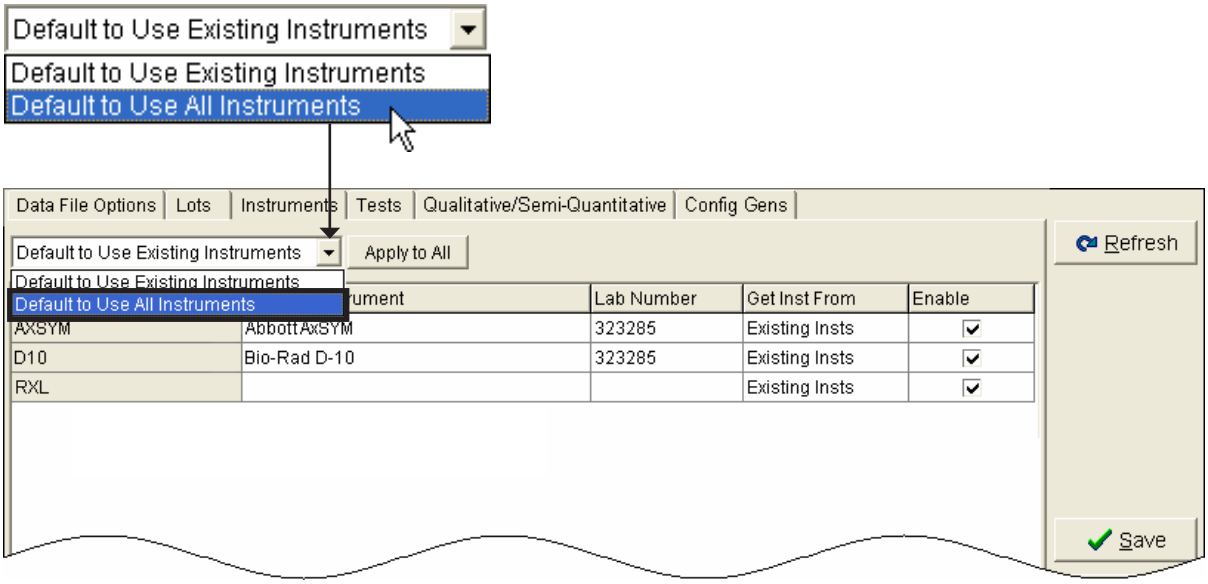


The **Instrument** tab also shows the specific instrument requiring configuration.



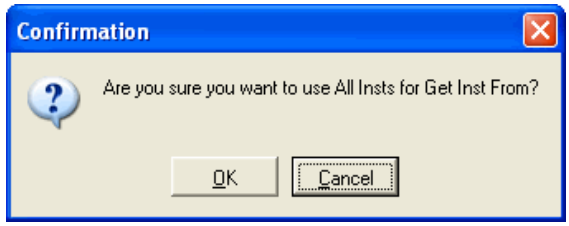
UnityConnect found the new instrument in the QC data file. The new instrument requires configuration to match the instrument name in the QC data file to the Bio-Rad instrument name.

2 Select **Default to Use All Instruments**.



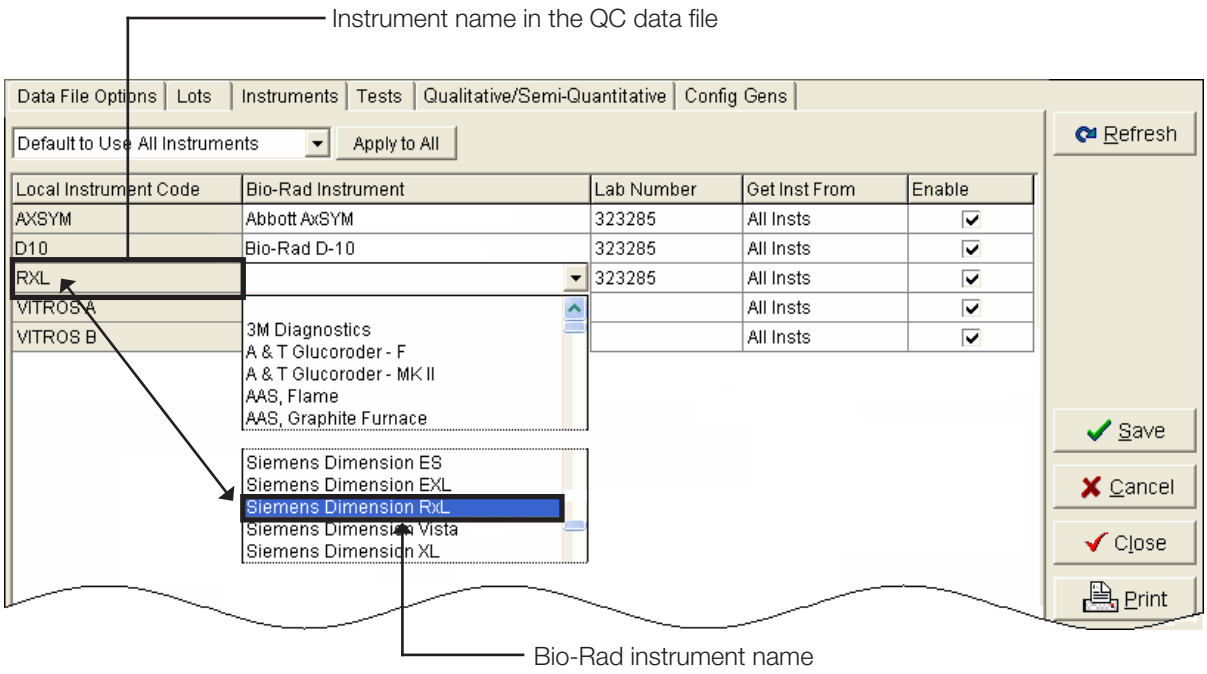
3 Click Apply to All .

A message appears asking for confirmation.

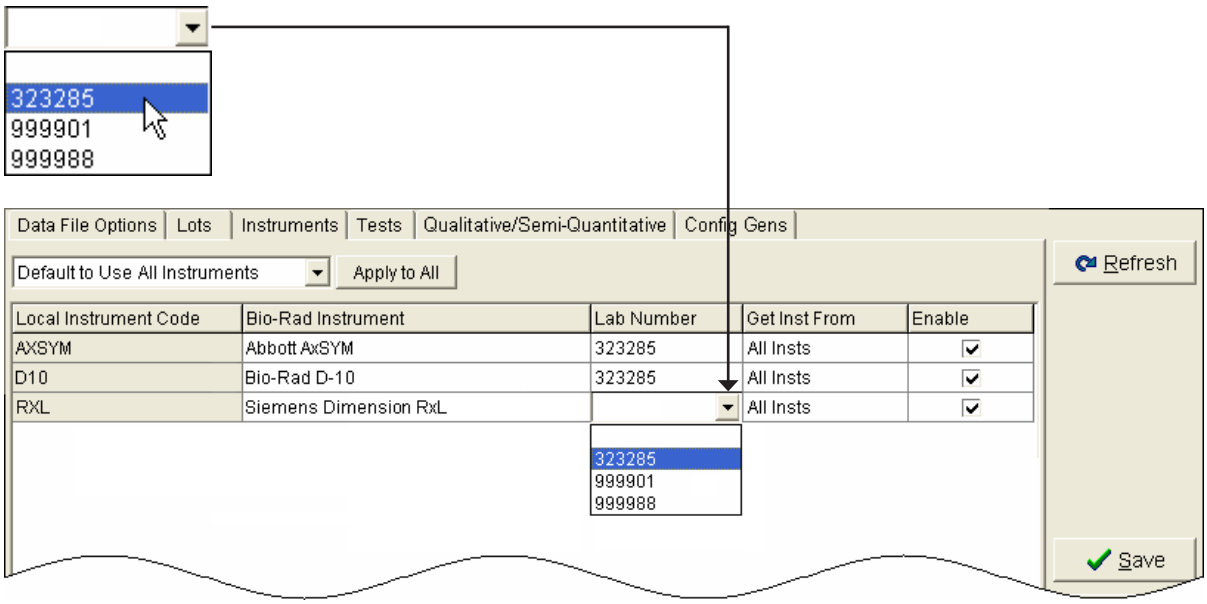


4 Click OK .

5 Click in the field of the **Bio-Rad Instrument** column requiring configuration and select the Bio-Rad instrument name corresponding to the name in the **Local Instrument** column.



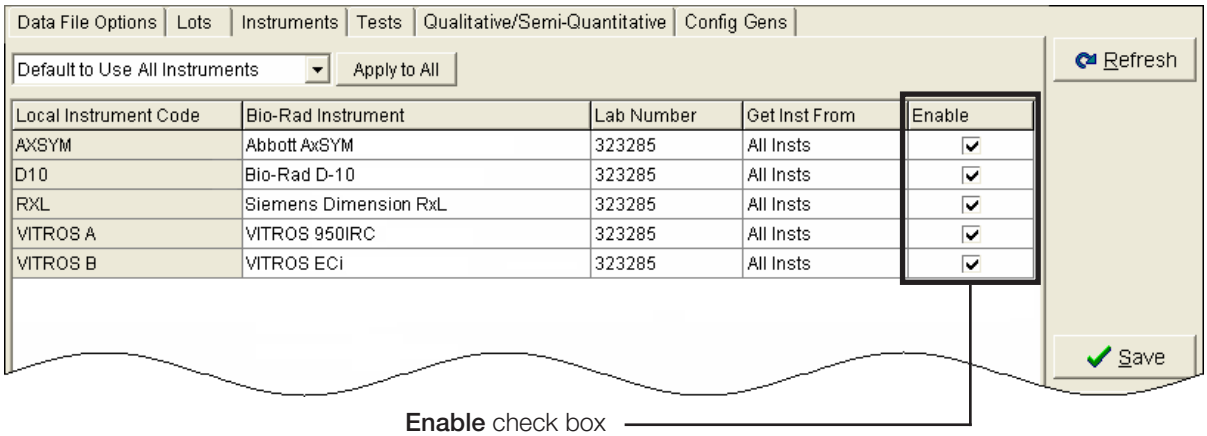
6 Click in the **Lab Number** column and select the lab number for the instrument.



Important: Two instruments of the same type must be set up in separate lab numbers. A lab number can only be assigned by Bio-Rad. Contact your Bio-Rad QC Program Representative if you need additional lab numbers.

7 Make sure the **Enable** check box is selected for UnityConnect to process data for the instrument.

Click the **Enable** check box to clear it and UnityConnect will exclude the instrument when transforming.

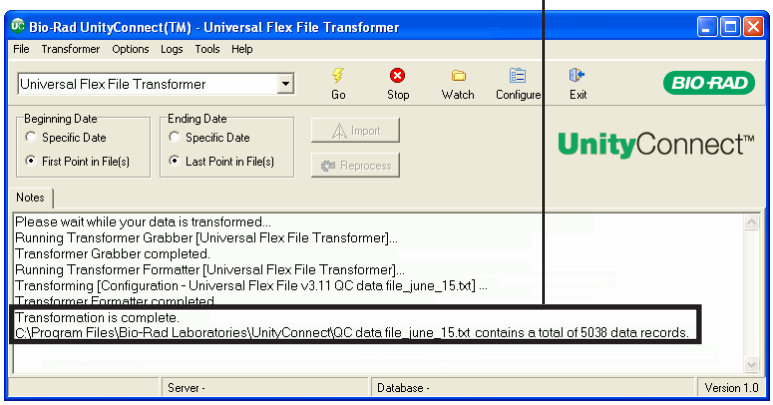


8 Click Save .

9 Click Close .

UnityConnect now has the information needed to transform data.

A message indicates transformation is complete.



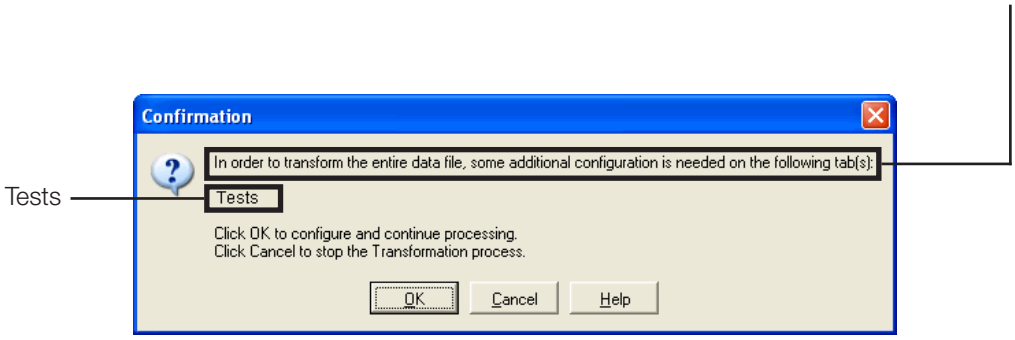
10 Read the information in the **Notes** section carefully and note the number of data records transformed.

> **Important**: Configuring the new QC item is a one-time process. After the new item is configured, UnityConnect recognizes the item for all future transformations.

Configuring a New Test

Important: Configuring information in UnityConnect varies according to the information in your QC data file and the specifics of your customized UnityConnect software. Therefore, the example configuration information shown in this chapter may not be identical.

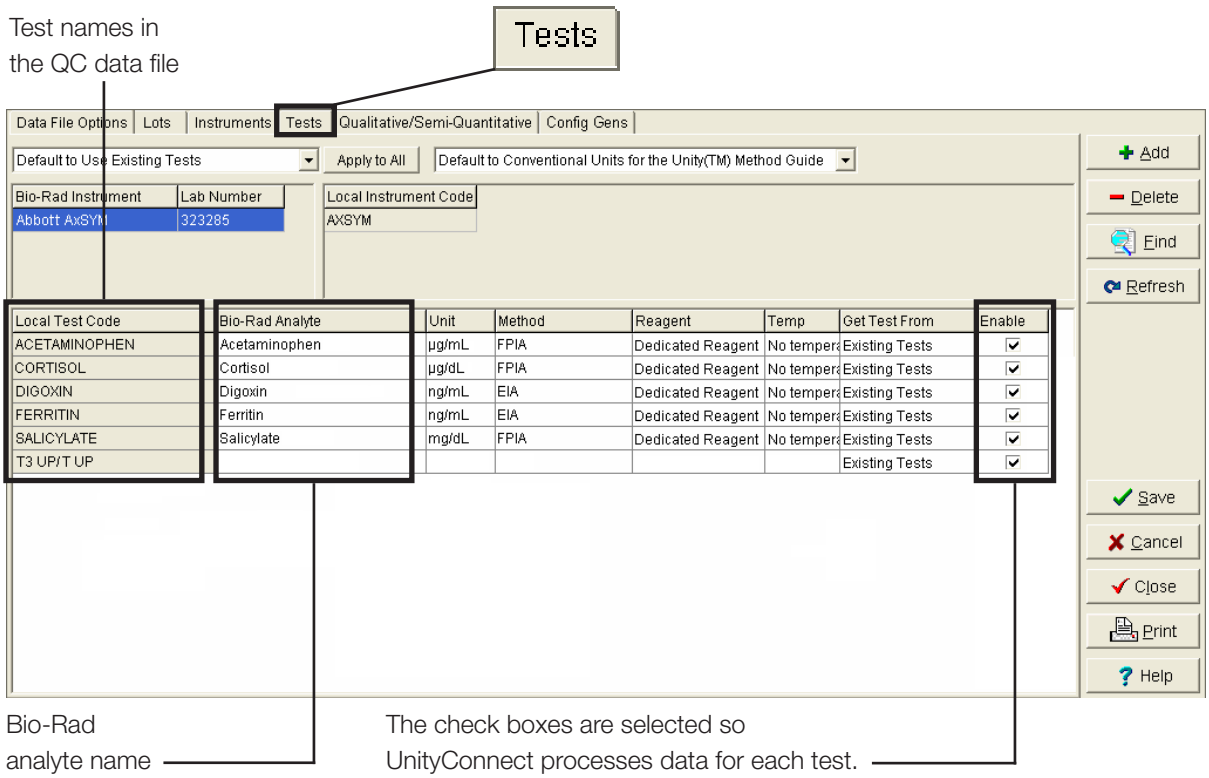
As UnityConnect processes the QC data file, a message appears when UnityConnect finds a new test.



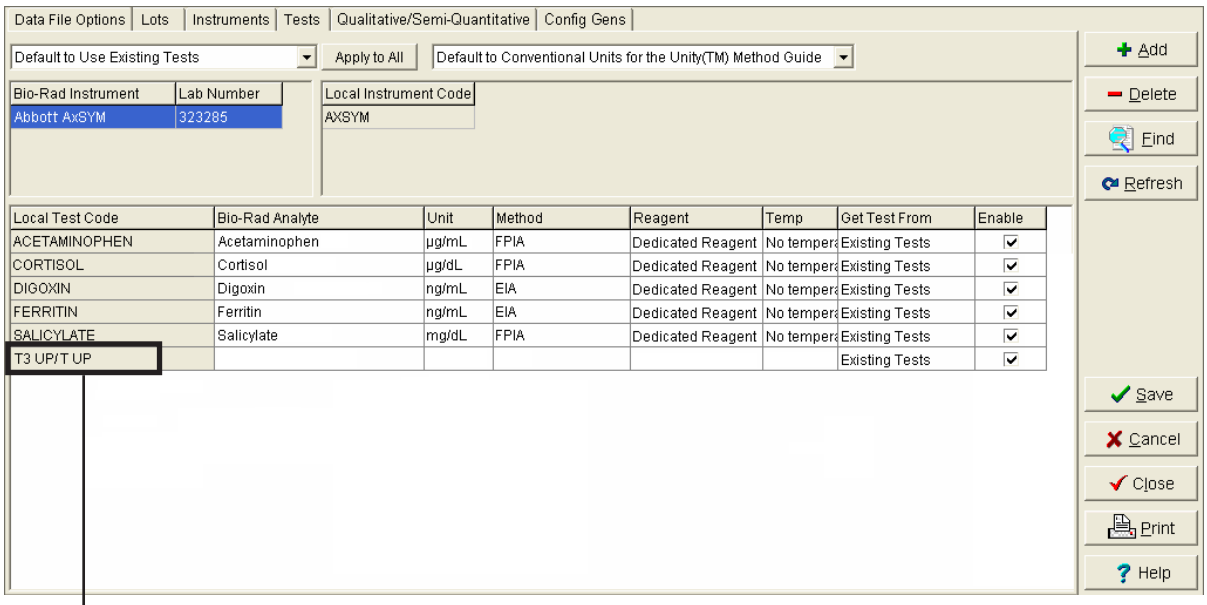
Important: This is not an error message. The message is simply stating there are new codes in the QC data file that have not been matched to Bio-Rad codes in your QC data management software.

1 Click OK.

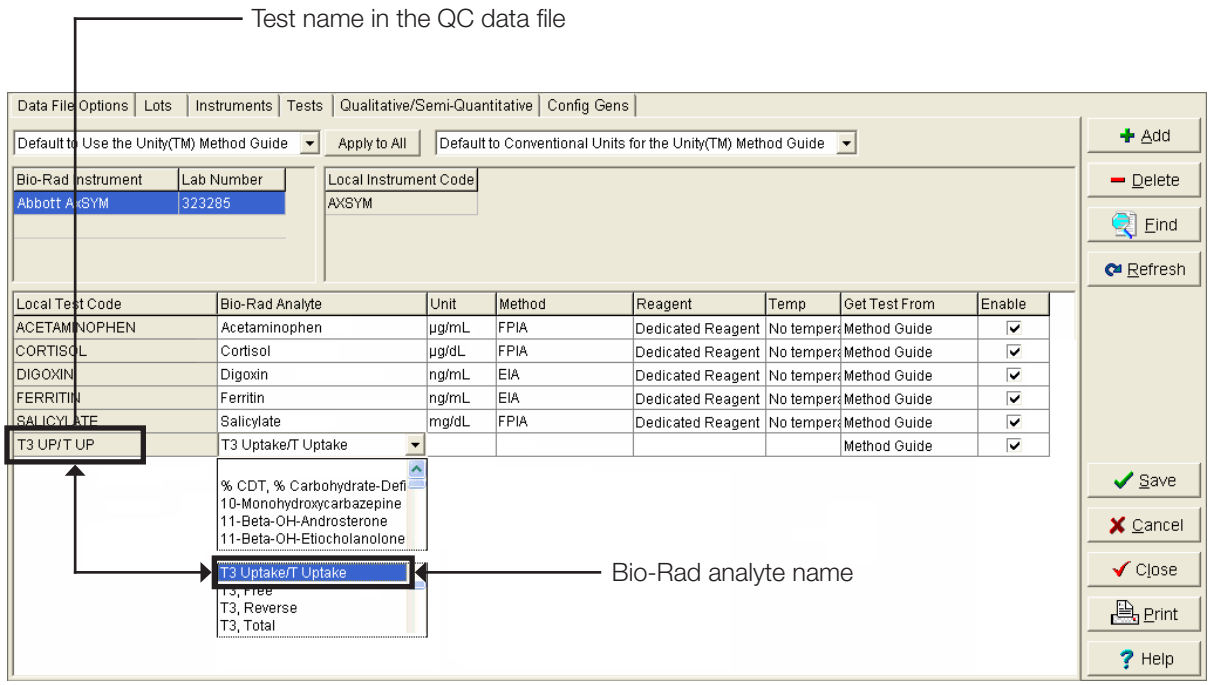
The **Tests** tab appears and shows the following information.



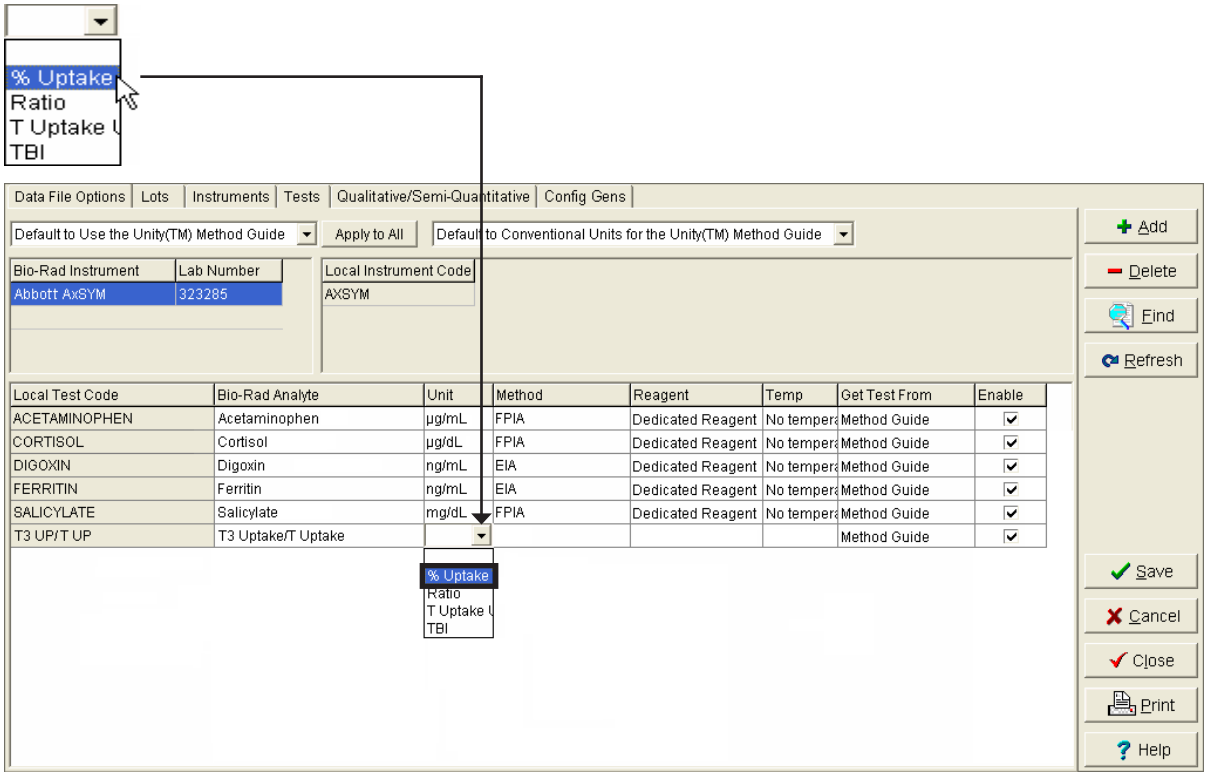
The **Tests** tab also shows the specific test requiring configuration.



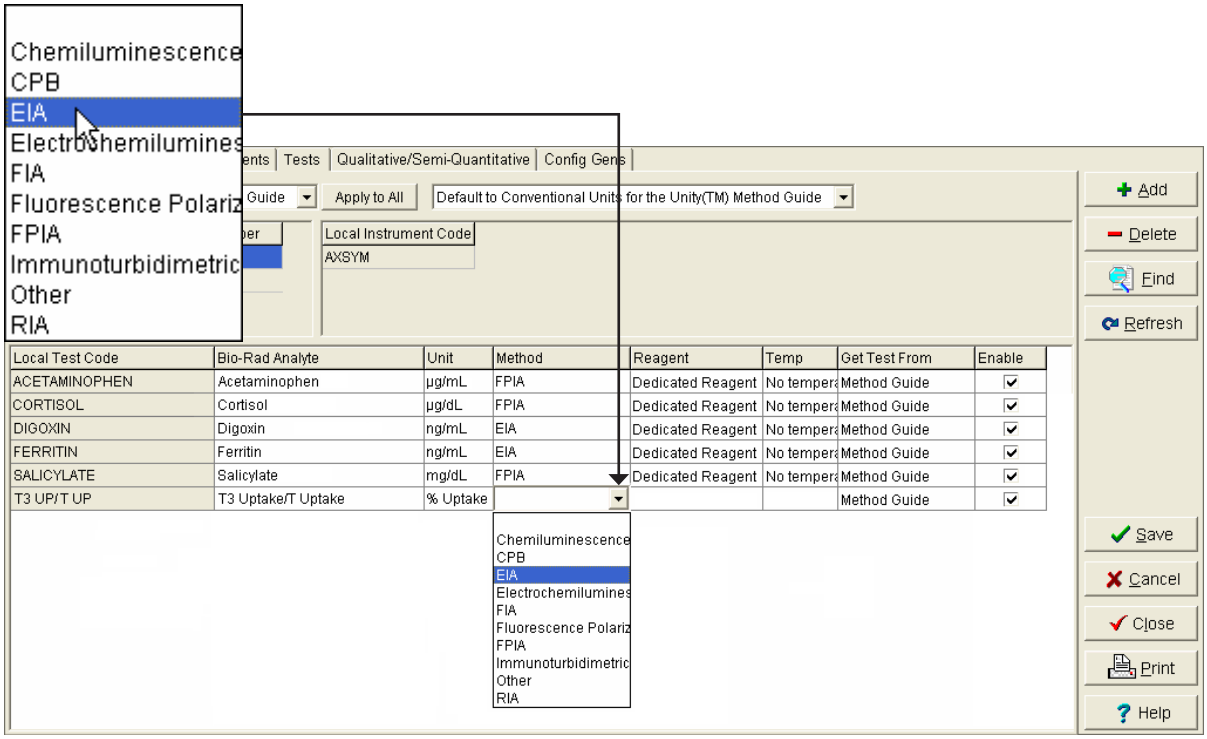
2 Click in the field of the **Bio-Rad Analyte** column requiring configuration and select the Bio-Rad analyte name corresponding to the name in the **Local Test Code** column.



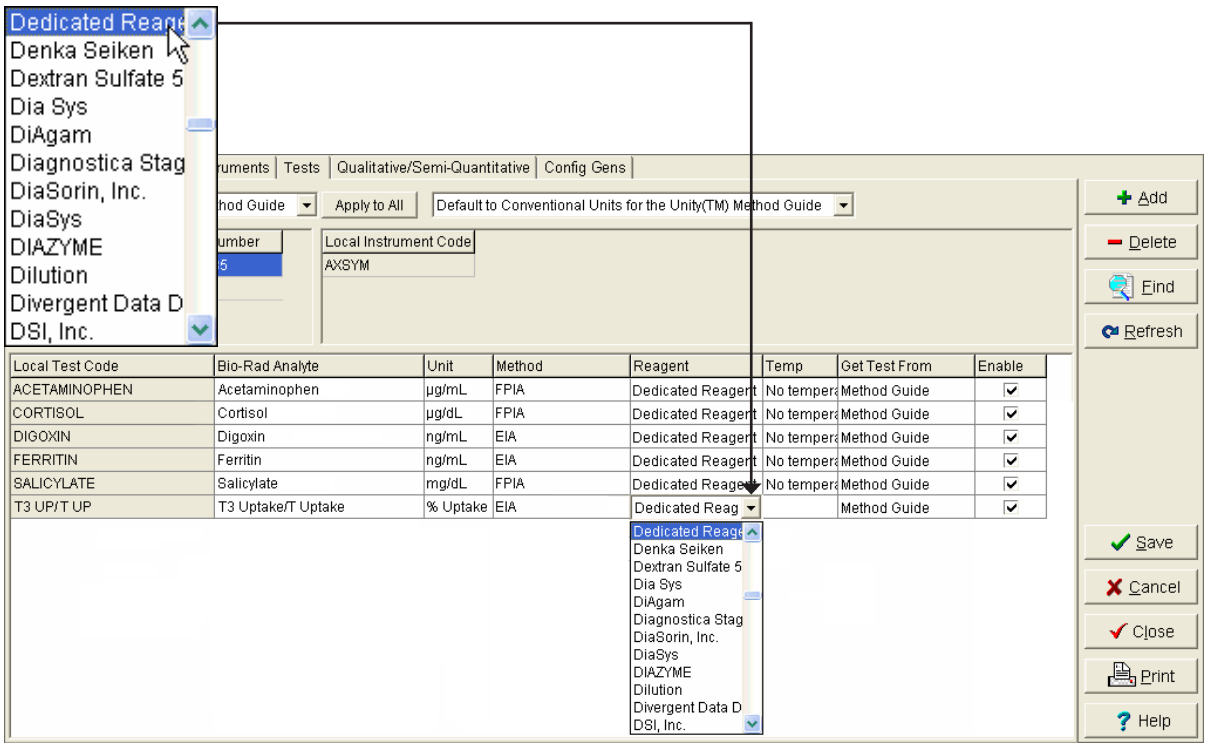
3 Click in the **Unit** column and select the unit for the test.



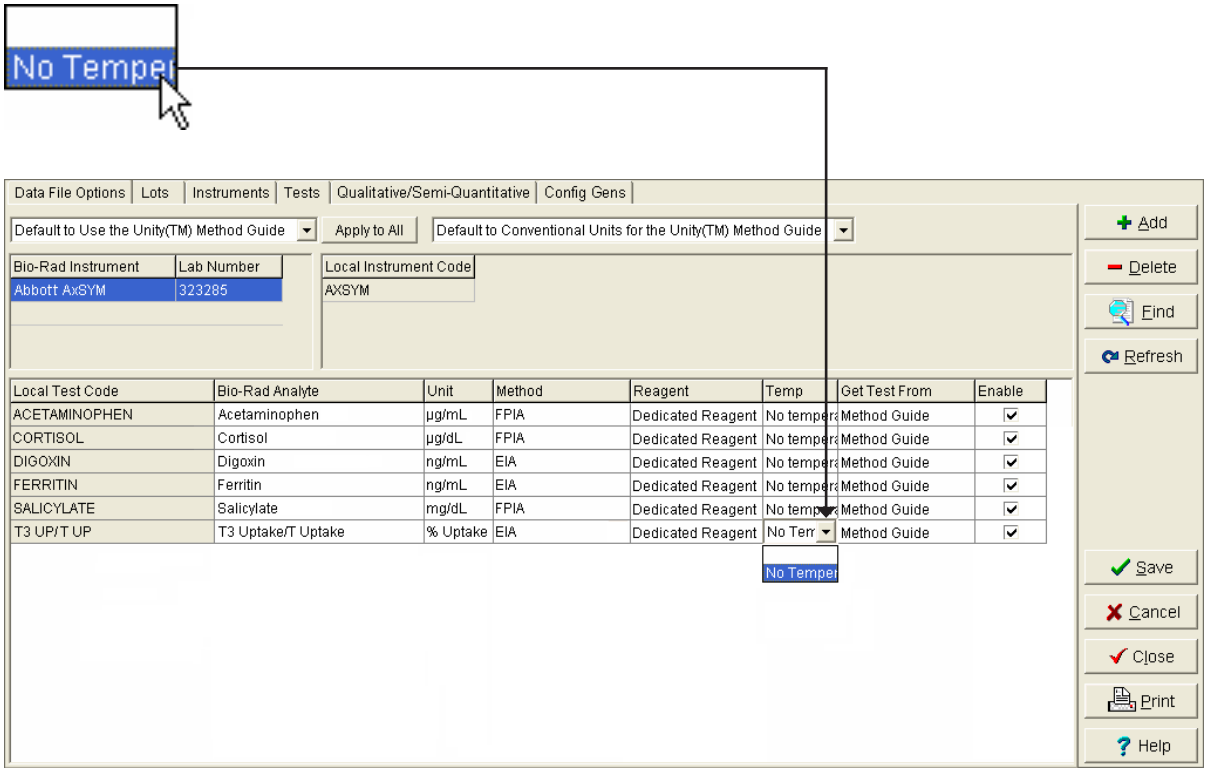
4 Click in the **Method** column and select the method for the test.



5 Click in the **Reagent** column and select the reagent for the test.



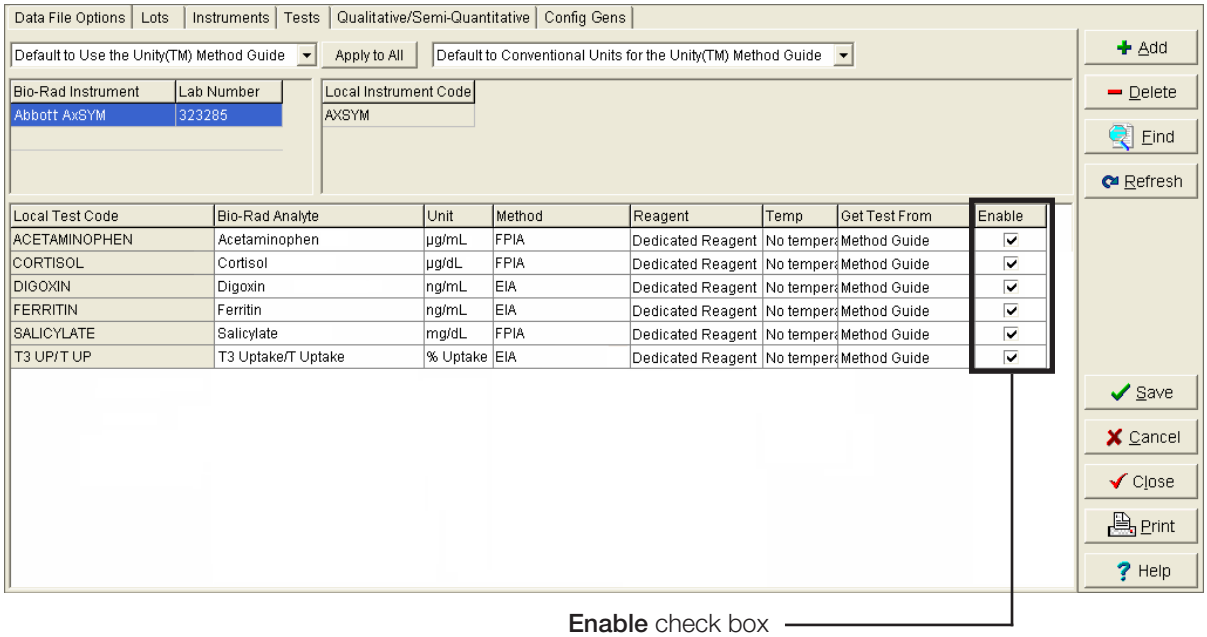
6 Click in the **Temperature** column and select the temperature for the test.



Note: Temperature applies to enzymes only. For all other analytes, **No temperature** is the only available option.

7 Make sure the **Enable** check box is selected for UnityConnect to process data for the test.

Important: Click the **Enable** check box to clear it and UnityConnect will exclude the test from current and future transforming. DO NOT delete the row. Deleting the row will cause the test to appear again for future transforming.

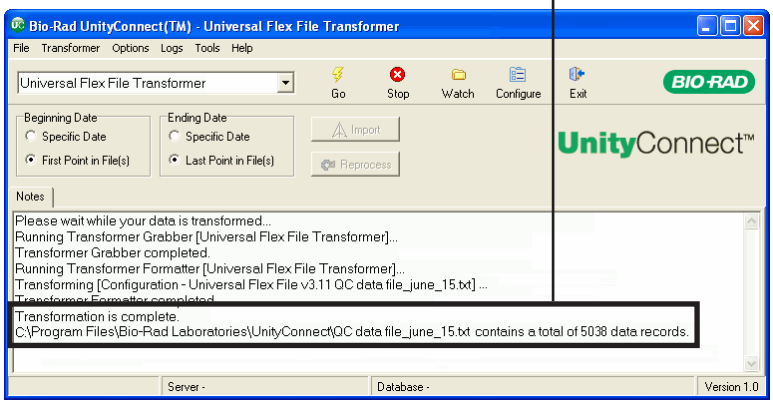


8 Click Save .

9 Click Close .

UnityConnect now has the information needed to transform data.

A message indicates transformation is complete.



10 Read the information in the **Notes** section carefully and note the number of data records transformed.

Important: Configuring the new QC item is a one-time process. After the new item is configured, UnityConnect recognizes the item for all future transformations.

CHAPTER 11

VITROS Slide Generation Numbers and UnityConnect

In This Chapter

Overview

Important: The VITROS ECi does not use slide generation numbers. Therefore, the information in this chapter does not pertain to the VITROS ECi instrument.

Slide Generation Number Decision Chart

Use the following chart as a guide for determining how to address slide generation numbers in UnityConnect.

VITROS Instrument Type	Uses slide generation numbers?	Slide generation numbers located in QC data file?	Manual setup slide generation numbers in UnityConnect required?
VITROS ECi	N/A	N/A	N/A
VITROS Fusion 5, 1 with UnityConnect Instrument Transformer	Yes	Yes	No
VITROS Fusion 5, 1 with UnityConnect LIS Transformer	Yes	No	Yes
VITROS 250	Yes	No	Yes
VITROS 350	Yes	No	Yes
VITROS 950	Yes	No	Yes

With the exception of the VITROS Fusion 5,1 using a UnityConnect instrument transformer, QC data files do not contain information about VITROS slide generation numbers so UnityConnect cannot automatically prompt you to update or add slide generation numbers. Therefore, all slide generation number changes must be made manually in UnityConnect before transforming data. If the slide generation number is not updated in UnityConnect before transforming data, the data for the new slide generation number is reported on an incorrect slide generation number.

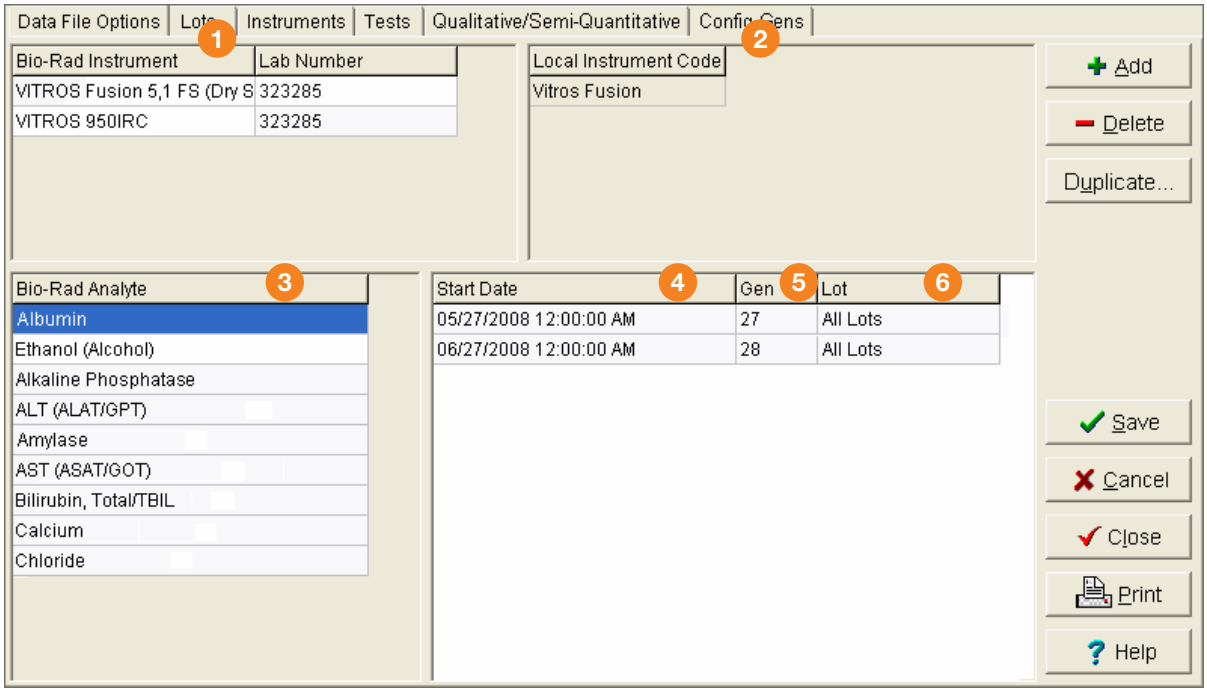
Slide generation numbers are automatically updated in your QC data management software and UnityConnect if you are using a VITROS Fusion 5,1 with a UnityConnect instrument transformer. Therefore, you do not need to manually change slide generation numbers in UnityConnect.

Note: The VITROS Fusion 5,1 can use both dry tests and wet tests. As a general rule, dry tests have slide generation numbers but wet tests do not.

Example Config Gens Tab

The Config Gens tab contains information about slide generation numbers manually set up in UnityConnect.

> **Important**: This chapter applies only to certain customers. Please refer to the "Slide Generation Number Decision Chart" on page 202 to determine if your circumstances require manual set up of slide generation numbers in UnityConnect.



1 Bio-Rad Instrument and Lab Number

The Bio-Rad instrument and corresponding lab number using slide generation numbers as defined on the **Instruments** tab. If more than one instrument is in this list, click the Bio-Rad instrument or lab number to view the related **Local Instrument**, **Bio-Rad Analyte**, **Start Date**, **Gen**, and **Lot** information for the instrument.

2 Local Instrument

The instrument designation in the QC data file.

3 Bio-Rad Analyte

The corresponding Bio-Rad analyte names for the tests configured for the selected instrument.

4 Start Date

The date and time the slide generation number was first used

5 **Gen**

The current slide generation number.

6 **Lot**

The lot number which the current slide generation number is associated with.

Best Practices—Manage Manual VITROS Slide Generation Changes

Important: The Unity Interlaboratory Program uses the VITROS slide generation numbers to determine the consensus group. Make sure the VITROS slide generation number is correct for each test to ensure accurate Unity Interlaboratory Reports.

It is important to establish a regular process for tracking slide generation numbers. Use the Slide Generation Worksheet on page 212 or a similar process to track the VITROS slide generation numbers.

Managing Slide Generation Numbers in UnityConnect

Important: This chapter applies only to certain customers. Please refer to the "Slide Generation Number Decision Chart" on page 202 to determine if your circumstances require manual changing of slide generation numbers in UnityConnect.

All slide generation changes must be made manually in UnityConnect before transforming data. If the slide generation number is not updated in UnityConnect before transforming data, the data for the new slide generation number is reported on an incorrect slide generation number.

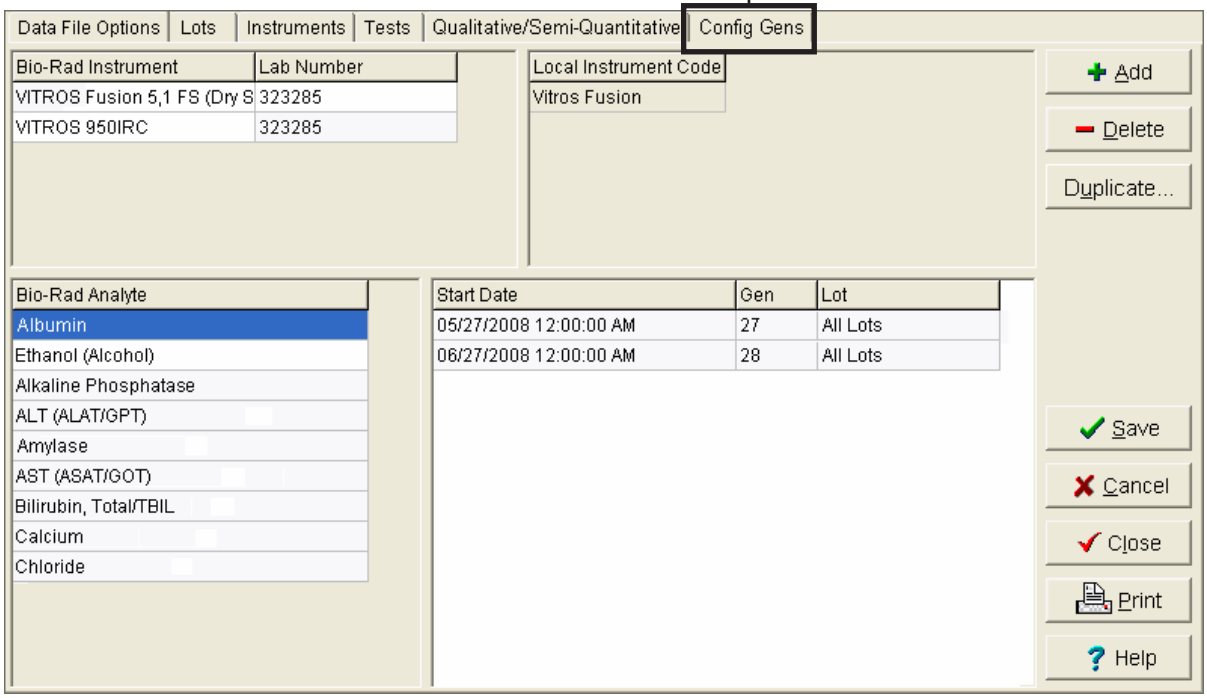
Each test setup is an individual combination of test items. Therefore, when you change to a new slide generation number, you create a new test.

1 Start UnityConnect.

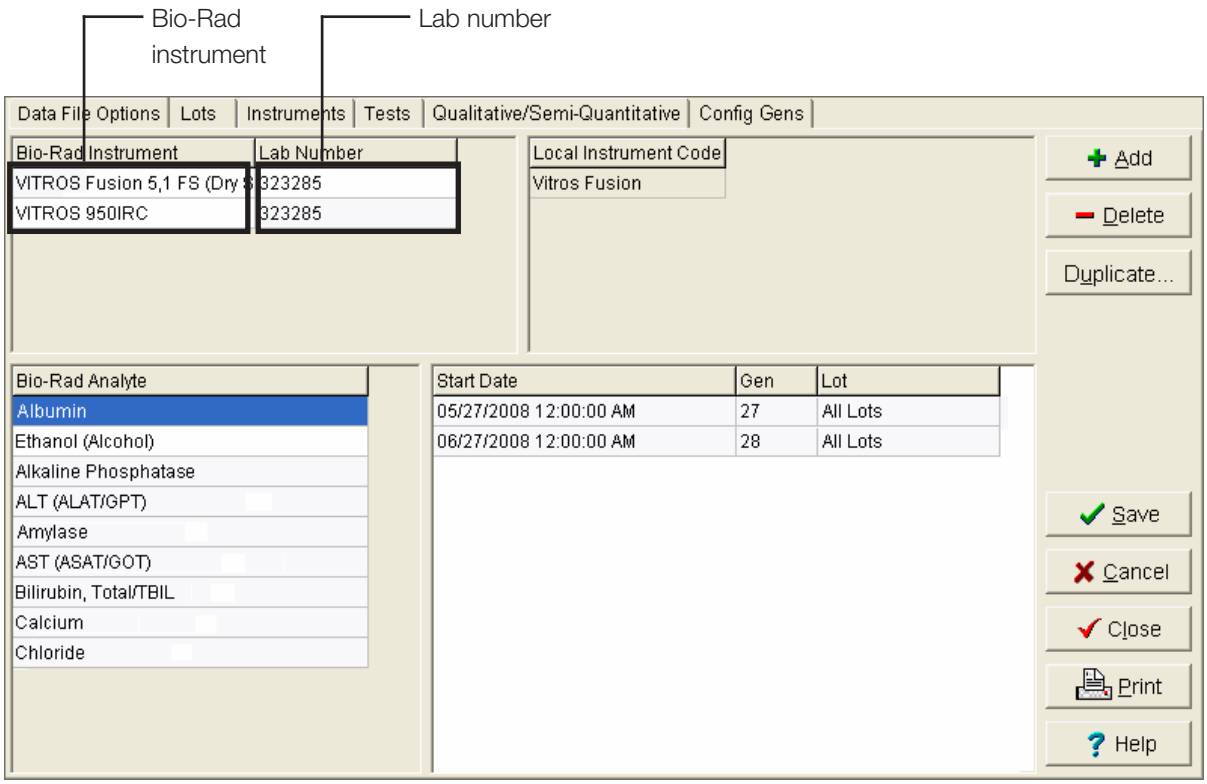
2 Select the appropriate transformer from the **Select a transformer** list.

3 Click Configure.

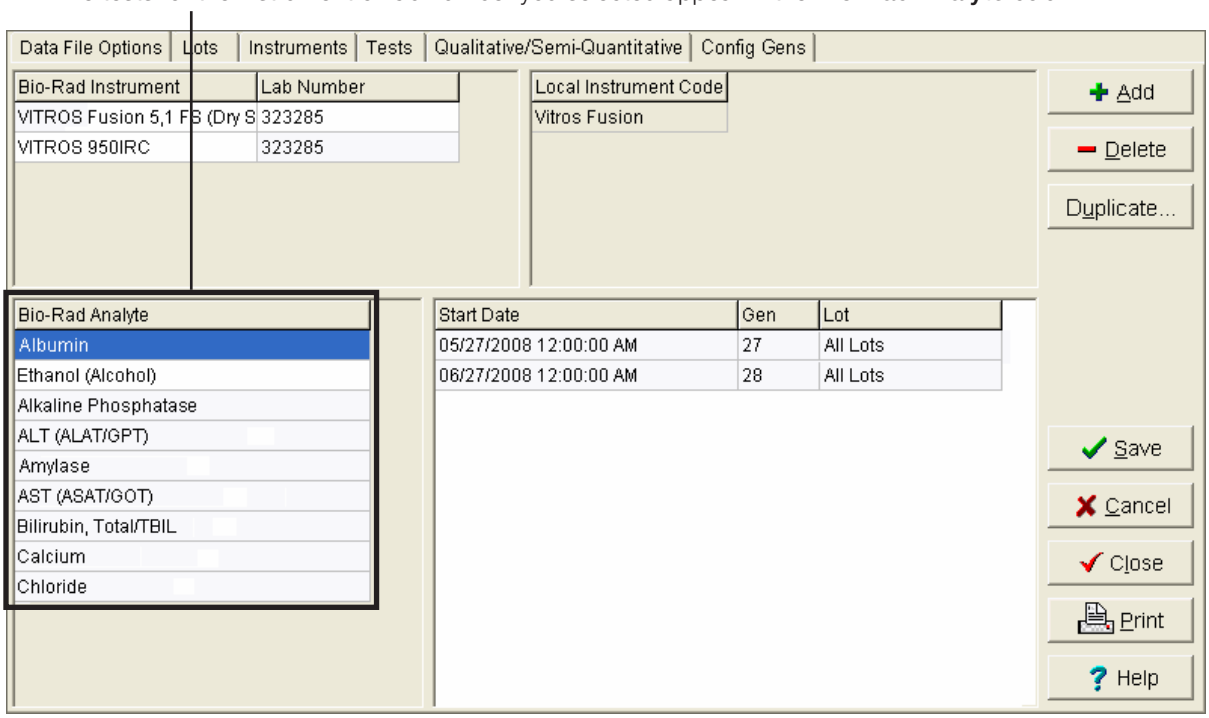
4 Click the **Config Gens** tab.



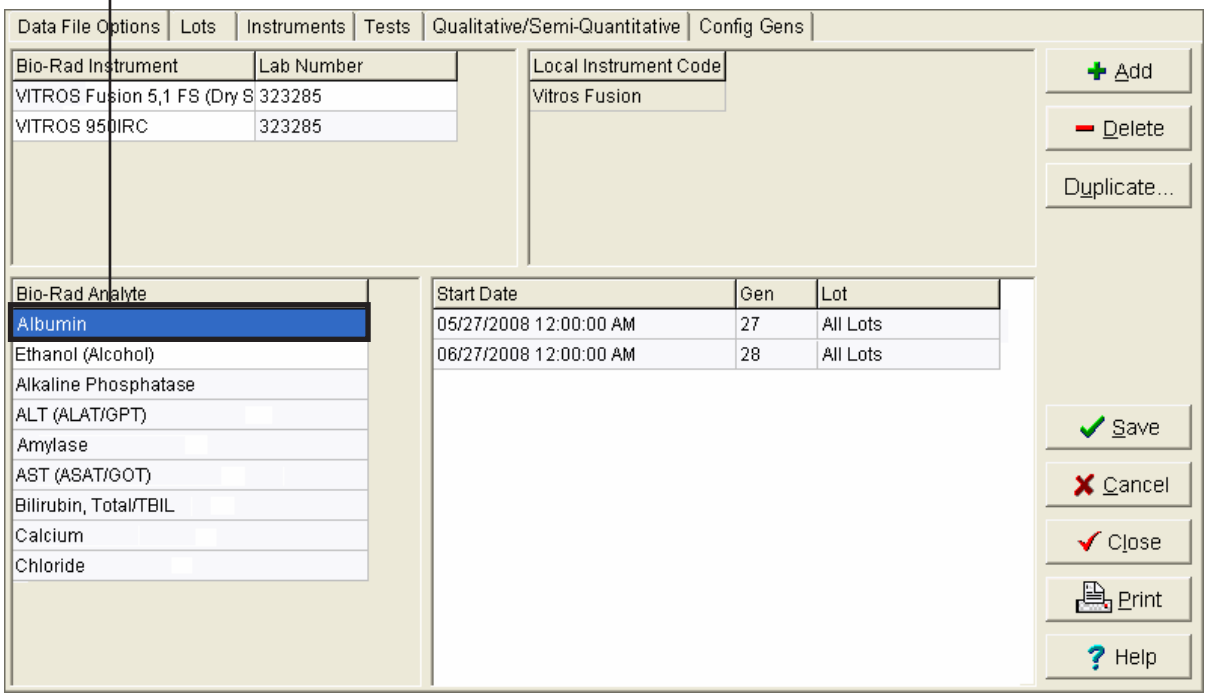
5 Click the Bio-Rad instrument or lab number with the slide generation number to change.



The tests for the instrument or lab number you selected appear in the **Bio-Rad Analyte** column.

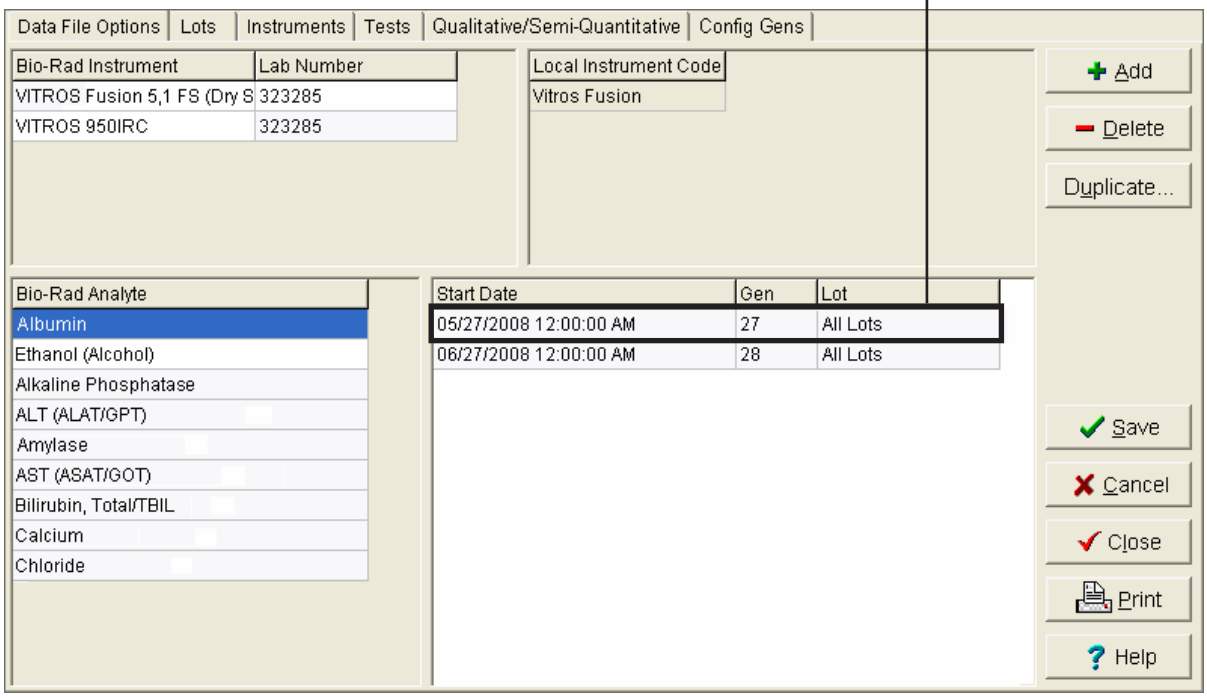


6 Click the test in the **Bio-Rad Analyte** column for which you want to change the slide generation number.



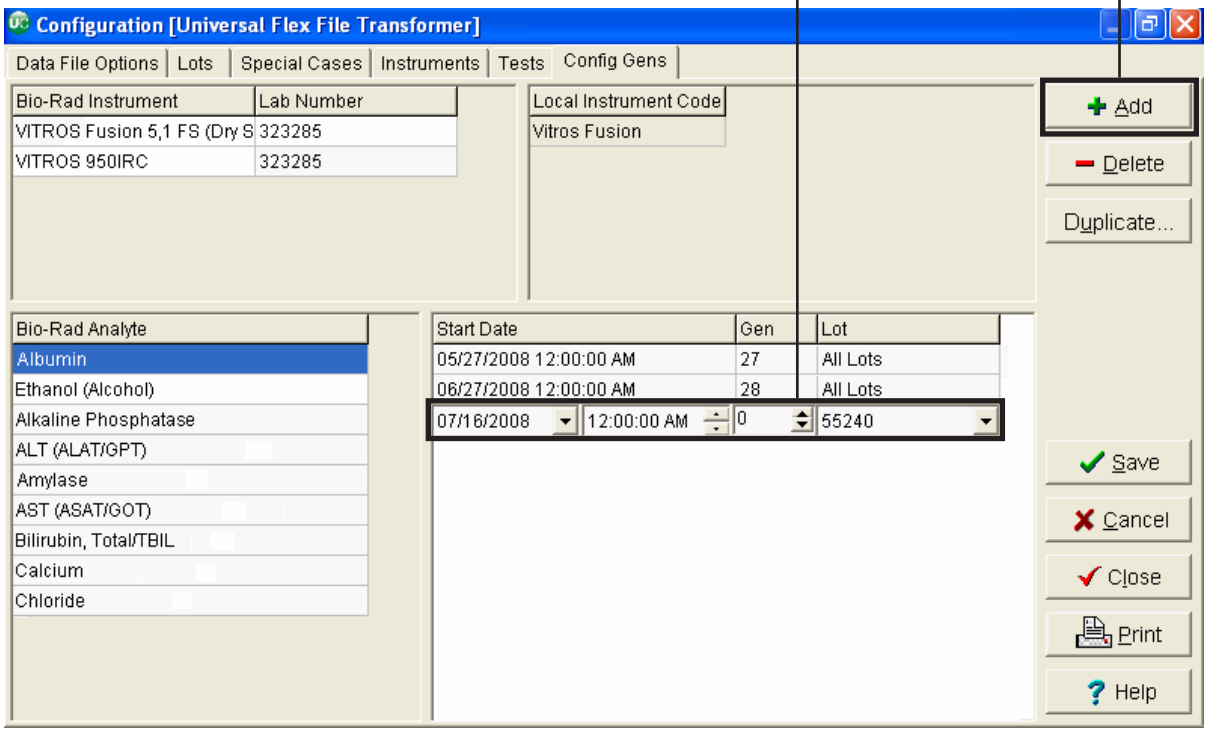
Tip: The selected test appears highlighted in blue.

The slide generation number details for the test appear.



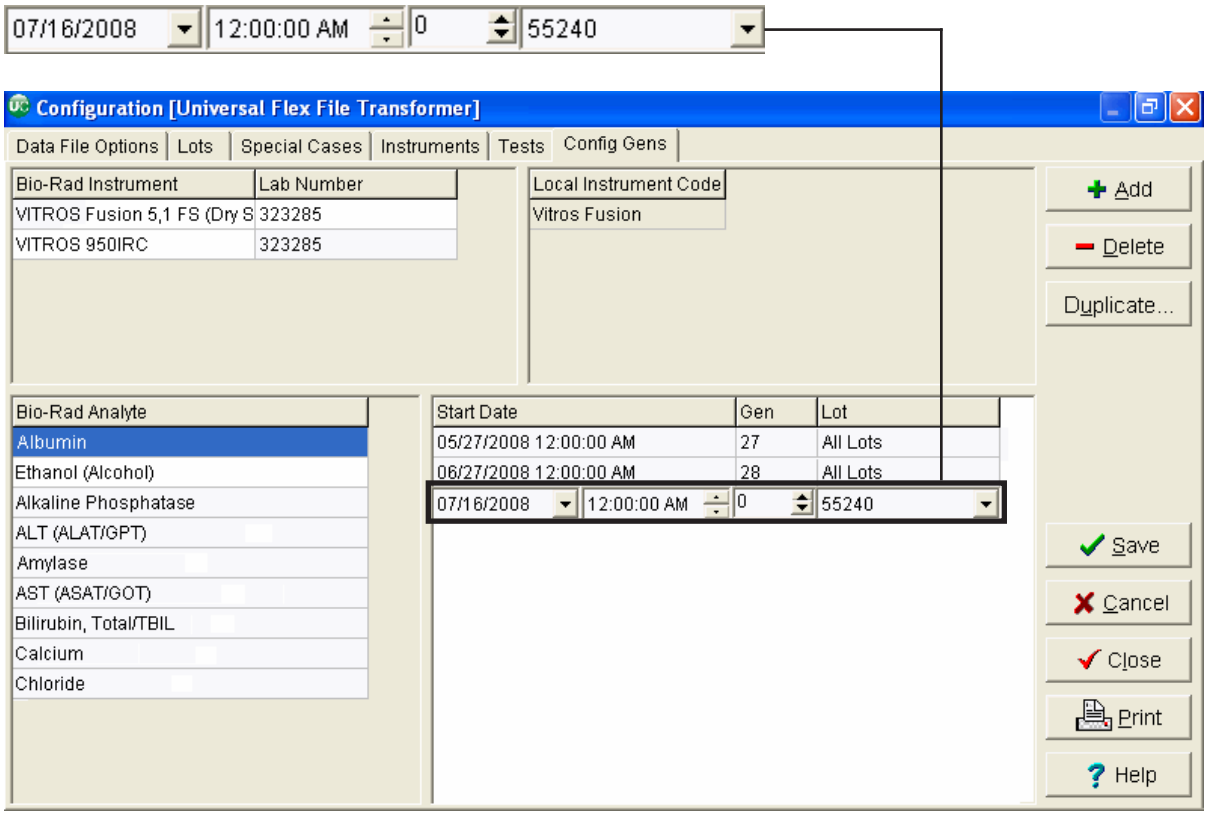
7 Click Add .

A new row is added for the new slide generation number.

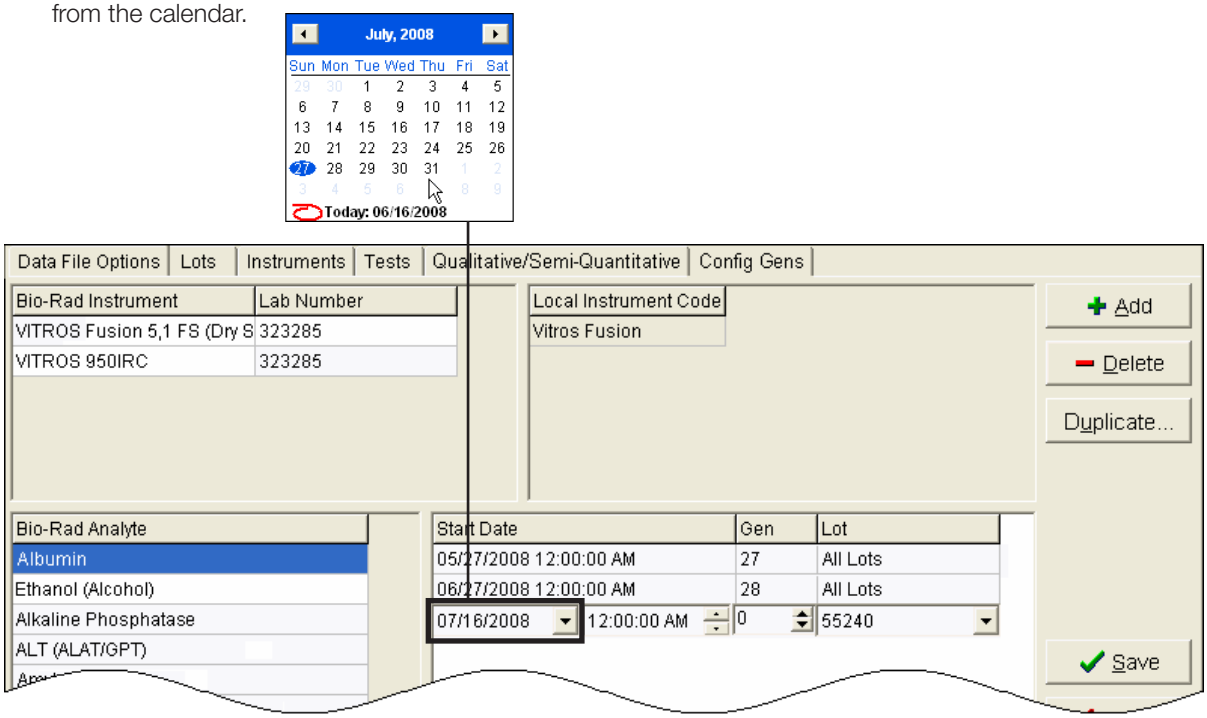


8 Click in the **Start Date** field.

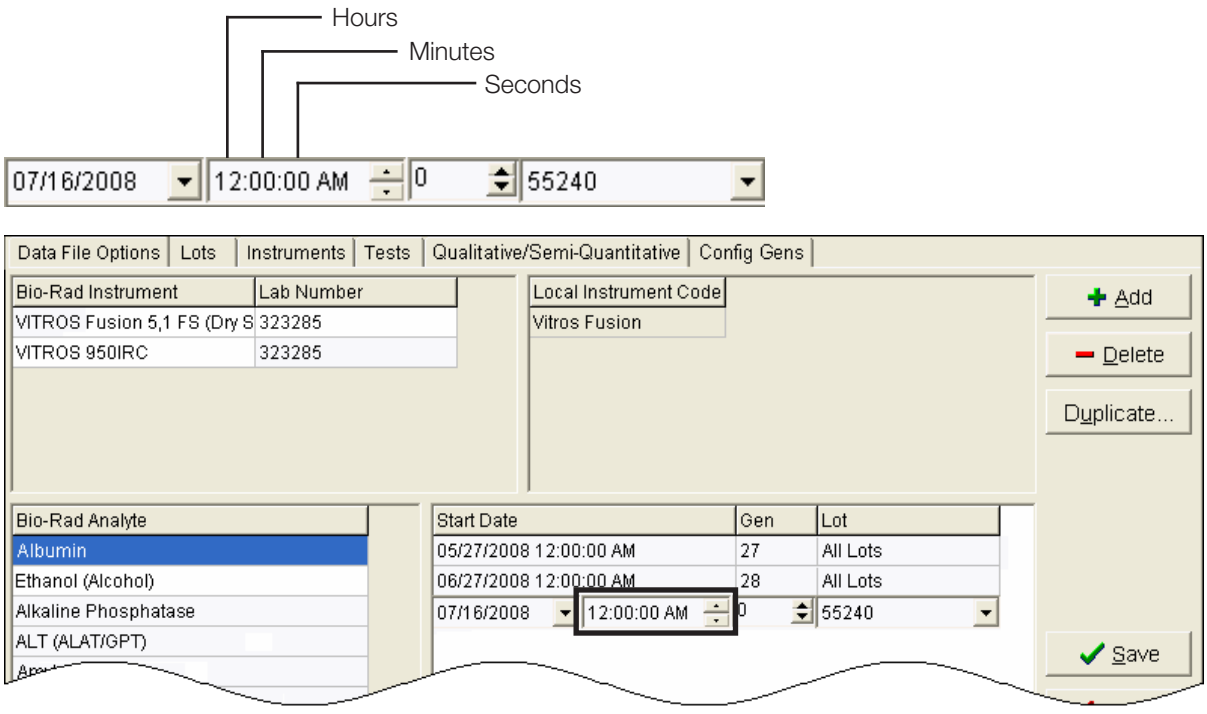
The field becomes active.



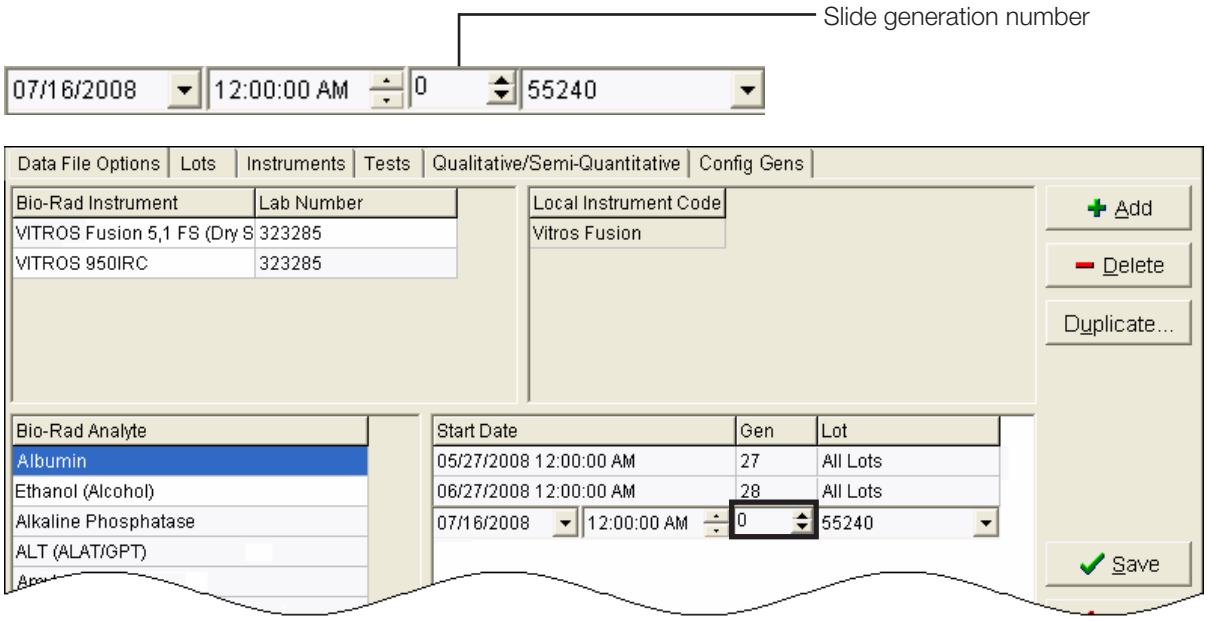
9 Click again in the **Start Date** field to display a calendar. Select a start date for the slide generation number from the calendar.



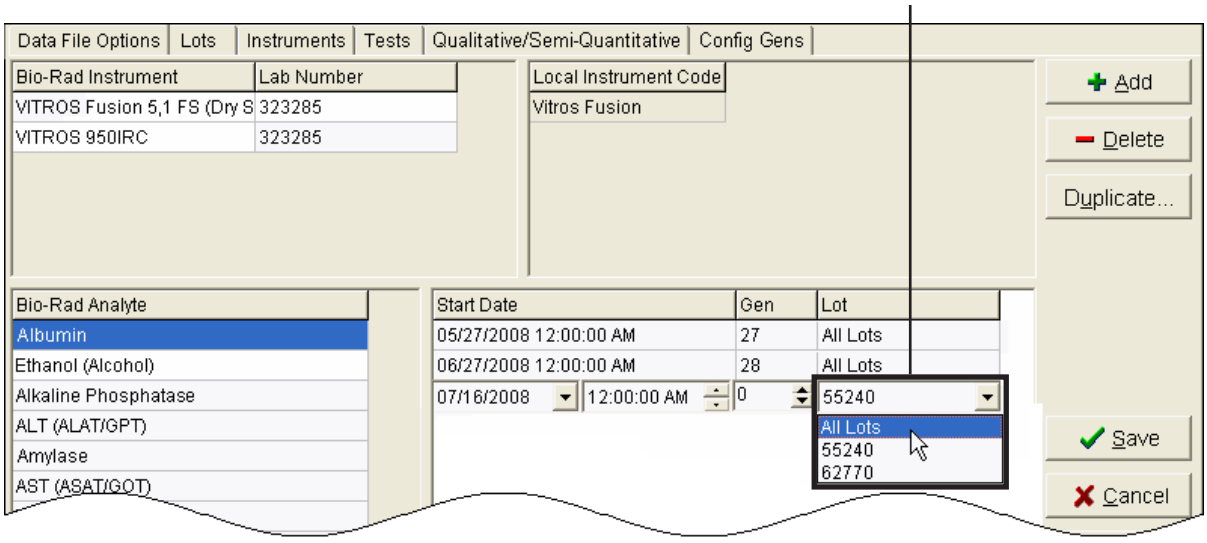
10 Click in the hours, minutes, and seconds fields and type the time for the slide generation number change.



11 Click in the **Gen** field and type the slide generation number.



12 Click in the **Lot** column and select the lot number for the slide generation number or select **All Lots**.



13 Click Save .

14 Repeat steps 6–14 for each test with a slide generation number change.

15 Click Close when all slide generation numbers are configured.

Slide Generation Worksheet

Tip: Use this worksheet to track your slide generation numbers. You can make additional copies as needed.

Lot Number	Analyte	Instrument	Gen #	Date in Use

Changing SPC Rules for a New VITROS Test

Important: Each time you make a slide generation number change, UnityConnect creates a new test with the new slide generation number. The new test uses the default SPC rules. You must manually change the SPC rules for the test in your QC data management software if you use customized SPC rules for the test or if you do not use any SPC rules. This applies even if the SPC rules are turned off at the lot level.

See the appropriate section based on your QC data management software:

- Unity Desktop and Unity Real Time (see page 213)
- UnityWeb 2.0 and Unity Real Time online (see page 214)

For Unity Desktop and Unity Real Time

1 Start your QC data management software.

2 Select the test in the navigation tree.

3 Click 

.

4 Select an option (**Reject**, **Warn**, or **Off**) for each SPC rule.

The status of each rule is indicated in the **Status** column using the symbols shown below:

 Reject

 Warn

 Off

Note: Click **Disable SPC Rules** to set all the rules to off.

5 Click 

.

For UnityWeb 2.0 and Unity Real Time online

1 Log in to your QC data management software.

2 Click the **Configure** tab.

3 Click **Rules/Settings**.

4 Click the **Rules** tab.

5 Select the **Lab** or **Panel** option.

6 Select the lab number or panel name from the **Lab** or **Panel** list.

7 If using the **Lab** option, select the lot number from the **Lot** list.

8 Select the test from the **Test** list.

9 Click **Rules**.

10 Select an option (**Reject**, **Warn**, or **Off**) for each SPC rule.

The status of each rule is indicated in the **Status** column using the symbols shown below:

 Reject

 Warn

 Off

Note: Click **Disable SPC Rules** to set all the rules to off.

11 Click **Save**.

CHAPTER 12

Viewing the Rejection Log for Desktop Software

In This Chapter

Overview

Rejected data is transformed data that was not imported into your QC data management software. The Rejection Log shows the details of all rejected data and provides a description about why the data was rejected.

Important: The Rejection Log does not show data rejected due to an SPC rule violation, but rather only transformed data that was not imported into your QC data management software.

In most cases of rejected data, no action is required. However, in some instances an error message is an indication that configuration adjustments are required. After the configuration adjustments are made, the QC data file must be transformed again.

This chapter provides information on how to review the Rejection Log and determine the appropriate action based on the error message.

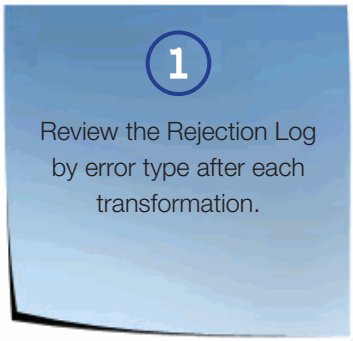
Before You Begin

This chapter is only for customers using UnityConnect with any of the following **desktop** software:

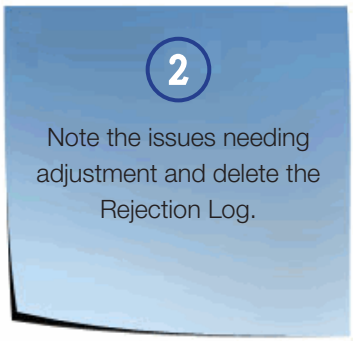
Unity Desktop

Unity Real Time

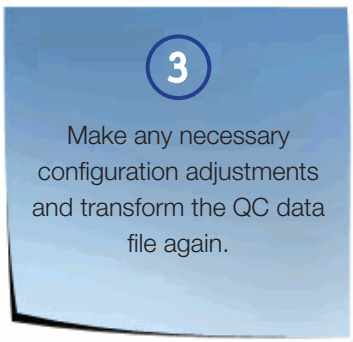
Using the Rejection Log



See “Viewing the Rejection Log” on page 217.



See “Deleting the Rejection Log” on page 220.



See “Rejection Log Messages” on page 221.

Viewing the Rejection Log

Best Practices—Review the Rejection Log by Error Type After Each Transformation

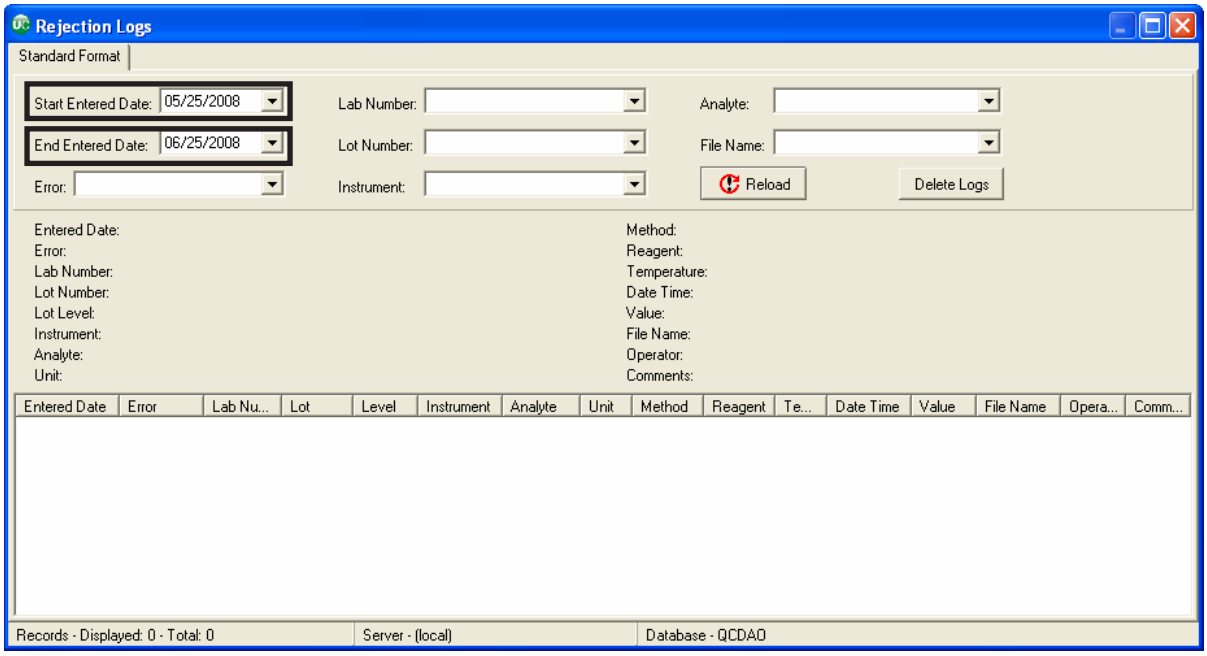
1 Start UnityConnect.

2 Click the **Logs** menu and then click **Rejection Logs**.

The **Database Login** dialog box appears.

3 Type your **User Password** and click **OK**.

4 Click the arrows located to the right of the **Start Entered Date** and/or **End Entered Date** to select another date range to view.



Tip: The **End Entered Date** defaults to the current date. The **Start Entered Date** is exactly one month earlier. You typically do not need to change these dates.

5 Select the type of error from the **Error** list.

> **Tip**: It is easiest to view the Rejection Log by each error type if the Rejection Log contains a large amount of information.

6 Select a lab number from the **Lab Number** list or select **All**.

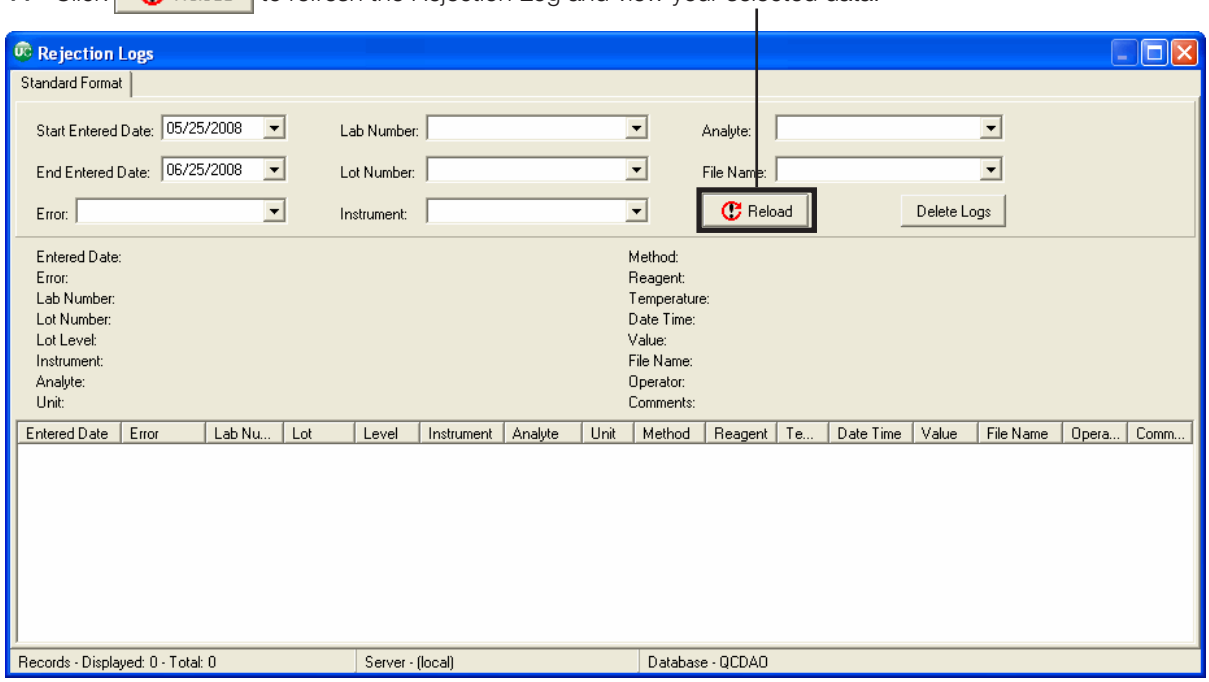
7 Select a lot number from the **Lot Number** list or select **All**.

8 Select an instrument from the **Instrument** list or select **All**.

9 Select an analyte from the **Analyte** list or select **All**.

10 Select a file name from the **File Name** list or select **All**.

11 Click Reload to refresh the Rejection Log and view your selected data.

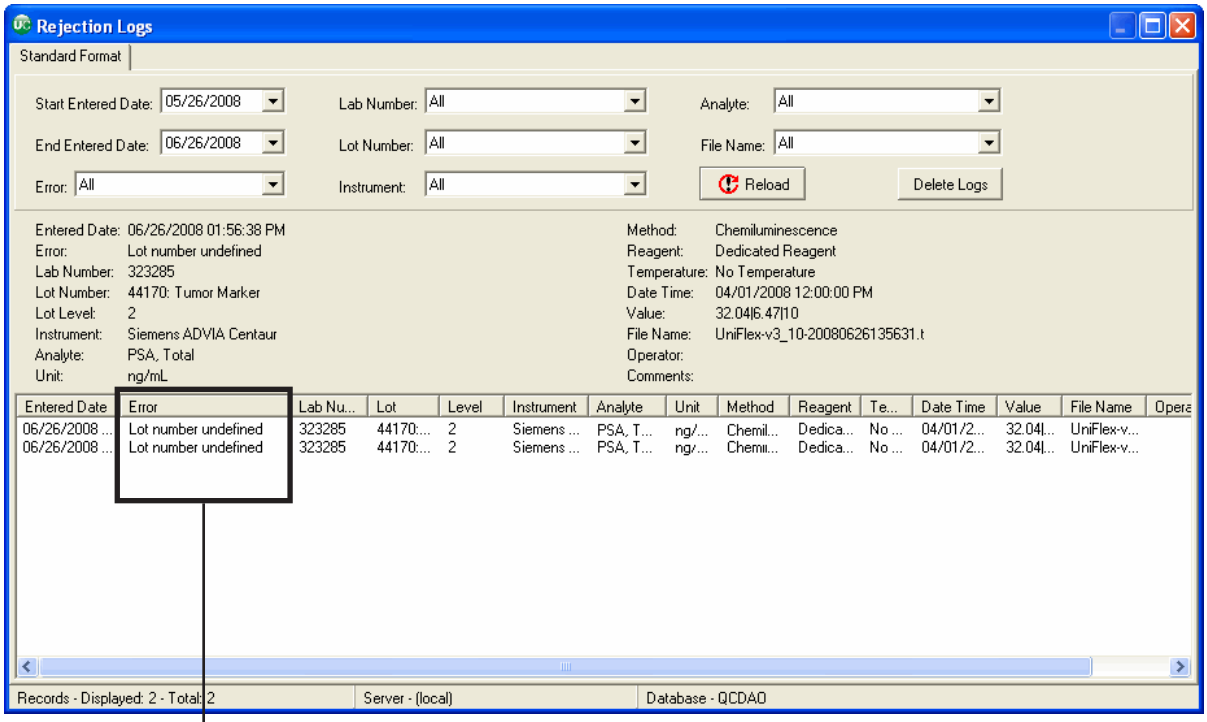


The Rejection Log appears according to the criteria you selected.

12 Review the Rejection Log paying special attention to the **Error** column.

The **Error** column indicates why the data was not imported.

Note: See "Rejection Log Messages" on page 221 for a description of messages and information about resolving the message.



Error column

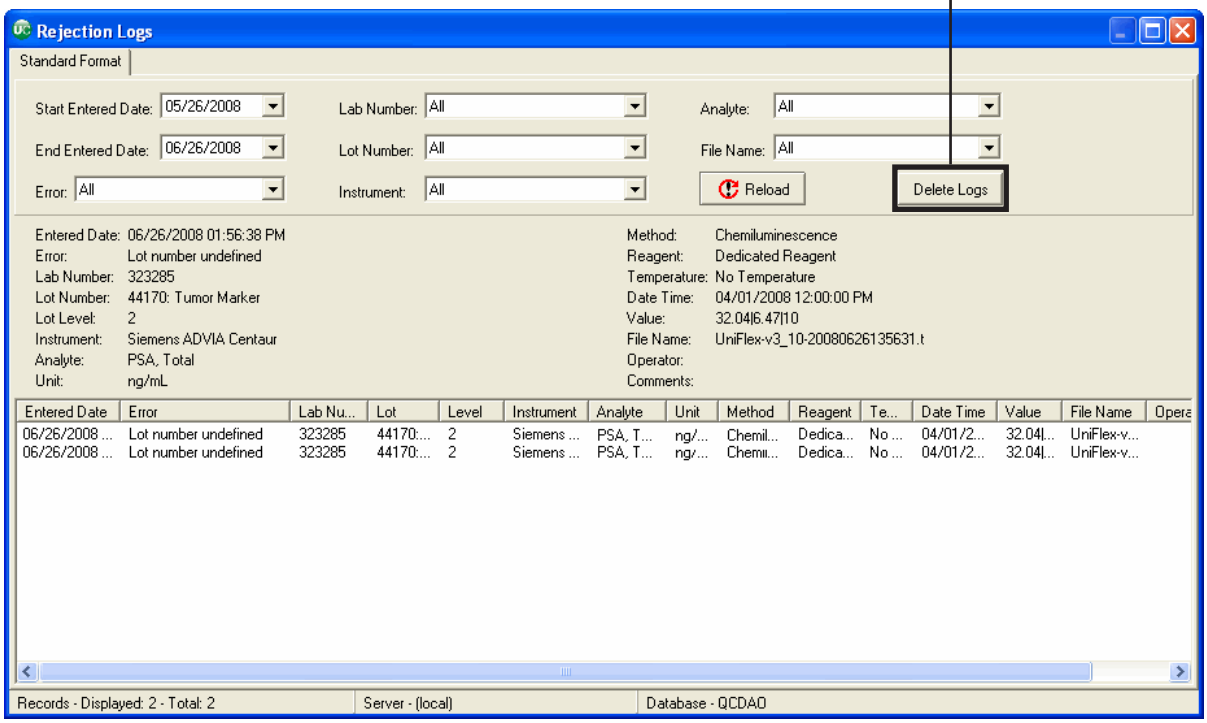
The error type should match the criteria you selected in step 5.

Deleting the Rejection Log

Best Practices—Note the Issues Needing Adjustment and Delete the Rejection Log

Bio-Rad recommends deleting the Rejection Log after each review to eliminate confusion.

Click Delete Logs .



Rejection Log Messages

The following are common Rejection Log messages. See the appropriate section for a description of the message and information about resolving the message.

- Create new tests if necessary is disabled (see page 221)
- Data entry locked for this test (see page 225)
- Date out of sequence (see page 225)
- Lab closed (see page 227)
- Lot closed (see page 227)
- Lot expired (see page 228)
- Lot number undefined (see page 228)
- Result invalid (see page 236)
- Time out of sequence (see page 237)

Error: Create new tests if necessary is disabled

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

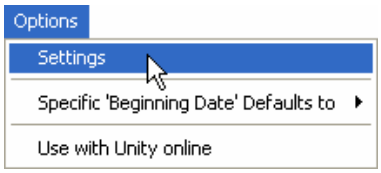
The **Create New Tests if Necessary** check box is not selected on the **Import** dialog box. UnityConnect is not able to create the new test in your QC data management software so the associated data cannot be imported.

Solution:

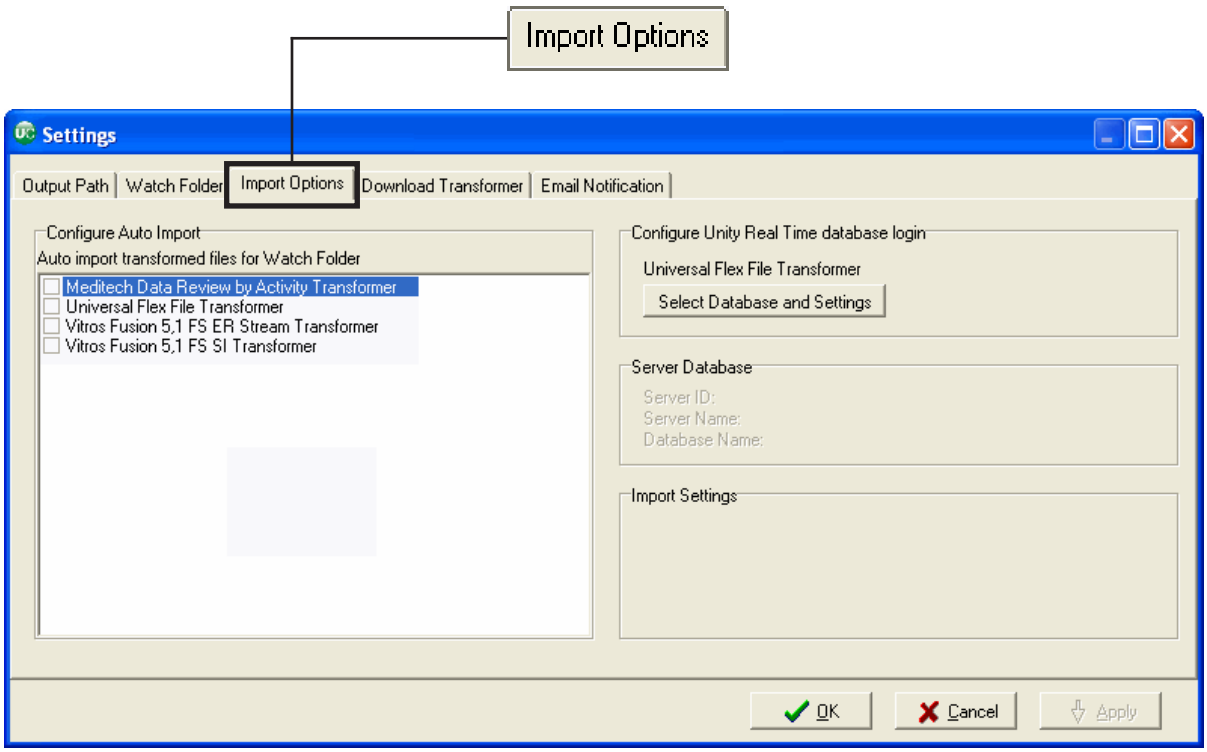
Make sure the **Create New Tests if Necessary** check box is selected on the **Import** dialog box.

1 Start UnityConnect.

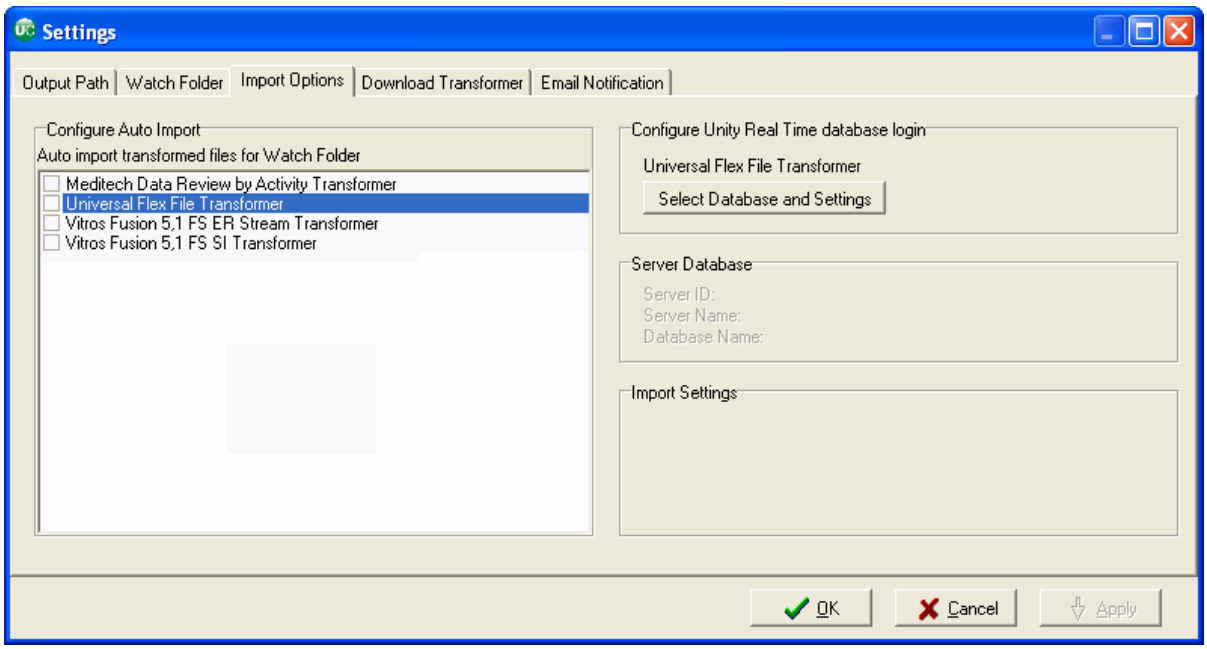
2 Click the **Options** menu and then click **Settings**.



3 Click the **Import Options** tab.

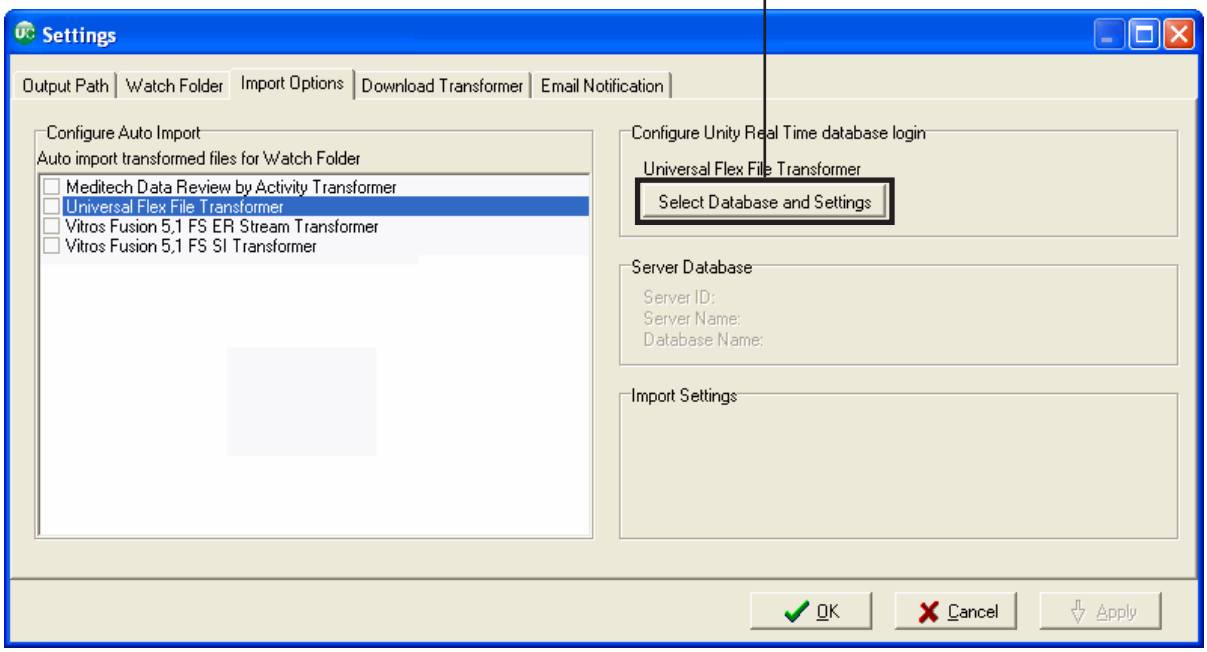


4 Select the transformer for which you want to configure import options.



Note: Do not select the check box for the transformer unless you want to set up automatic import. See “Configuring Automatic Import” on page 67 for more information.

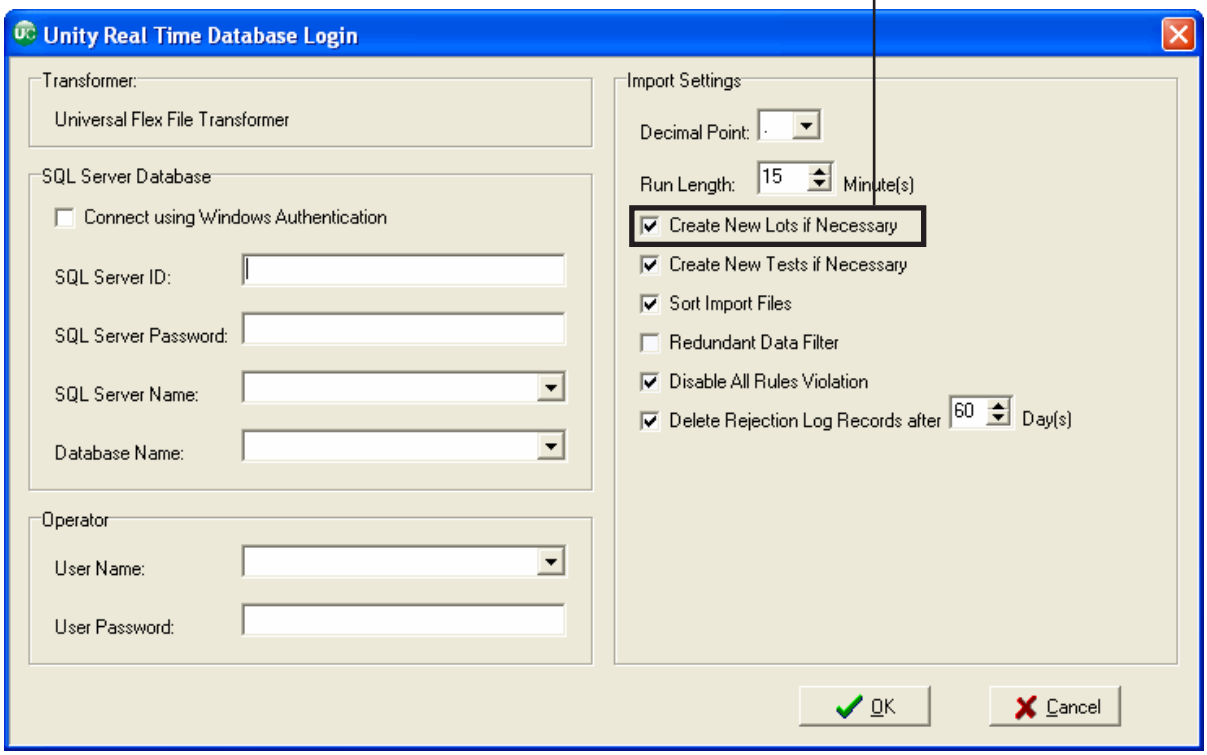
5 Click Select Database and Settings .



6 Make sure the **Create New Lots if Necessary** check box is selected.

The following illustration shows recommended import settings for customers not using their QC data management software for SPC rule evaluation.

Create New Tests if Necessary check box is selected.



7 Type your password in the **User Password** field.

8 Click OK.

9 Click OK again.

A new lot is automatically created when UnityConnect finds a new lot in your QC data file.

10 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

11 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the **Import** dialog box, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

12 Delete the Rejection Log.

Error: Data entry locked for this test

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

UnityConnect is not able to import data for a test when a data entry dialog box is open in any user's QC data management software.

Solution:

Wait until the data entry dialog box is closed.

1 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

2 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected on the **Import** dialog box, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

3 Delete the Rejection Log.

Error: Date out of sequence

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

This error occurs when you attempt to import data into your QC data management software out of chronological order. You can only import data with a testing date **after** the last date of data already in your QC data management software.

Typical Example:

You had a problem with your QC data on April 15, 16, and 17. In attempting to investigate the issue, you transformed a QC data file containing QC data for those three days (only) and UnityConnect automatically imported the data into your QC data management software.

On April 30 you transformed a QC data file containing **all** QC data for the month of April.

- All data points from April 1 through April 14 were rejected with a "Date out of sequence" error.
- Since data for April 15, 16, and 17 already exists, those data points were rejected as "Redundant data."
- All data points from April 18–30 imported successfully.

Solution—Unity Desktop and Unity Real Time

In order to import data points from April 1 through April 14, use the **Delete Range of Data** feature to delete data from April 15–30 before transforming the entire QC data file for April again.

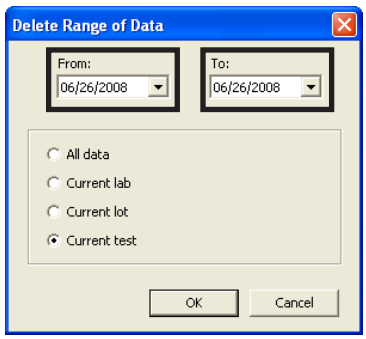
> **Important**: Deleting a range of data permanently removes the data from the software. Bio-Rad recommends exporting the data before deleting. See "Exporting Data" in the Reference Guide or Online Help for more information.

1 Start your QC data management software.

2 Click Test.

3 Click Delete Range of Data.

4 Click the arrow located to the right of the **From** date and select a beginning date for the range of data.



5 Click the arrow located to the right of the **To** date and select an ending date for the data.

6 Select an option for the scope of data to delete.

- **All data**
- **Current lab**
- **Current lot**
- **Current test**

7 Click OK.

A message appears asking for confirmation.

8 Click Yes.

9 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

10 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

11 Delete the Rejection Log.

Error: Lab closed

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

The lab number corresponding to the data is closed in your QC data management software.

Solution:

You cannot import data into your QC data management software for a closed lab. Open the lab number in your QC data management software.

1 Start your QC data management software.

2 Click 

in Unity Desktop or Unity Real Time.

3 Select the lab you want to open in the **Closed labs** list.

4 Click 

.

The lab number moves to the bottom of the **Open labs** list.

5 Click 

.

6 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

7 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected on the **Import** dialog box, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

8 Delete the Rejection Log.

Error: Lot closed

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

The lot number corresponding to the data is closed in your QC data management software.

Solution:

You cannot import data into your QC data management software for a closed lot. Open the lot number in your QC data management software.

1 Start your QC data management software.

2 Click 

in Unity Desktop or Unity Real Time.

3 Select the lot you want to open in the **Closed lots** list.

4 Click 

.

The lot number moves to the bottom of the **Open lots** list.

5 Click 

.

6 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

7 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected on the **Import** dialog box, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

8 Delete the Rejection Log.

Error: Lot expired

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

The lot number corresponding to the data is expired in your QC data management software.

Solution:

You cannot import data into your QC data management software for an expired lot. No further action is required.

Error: Lot number undefined

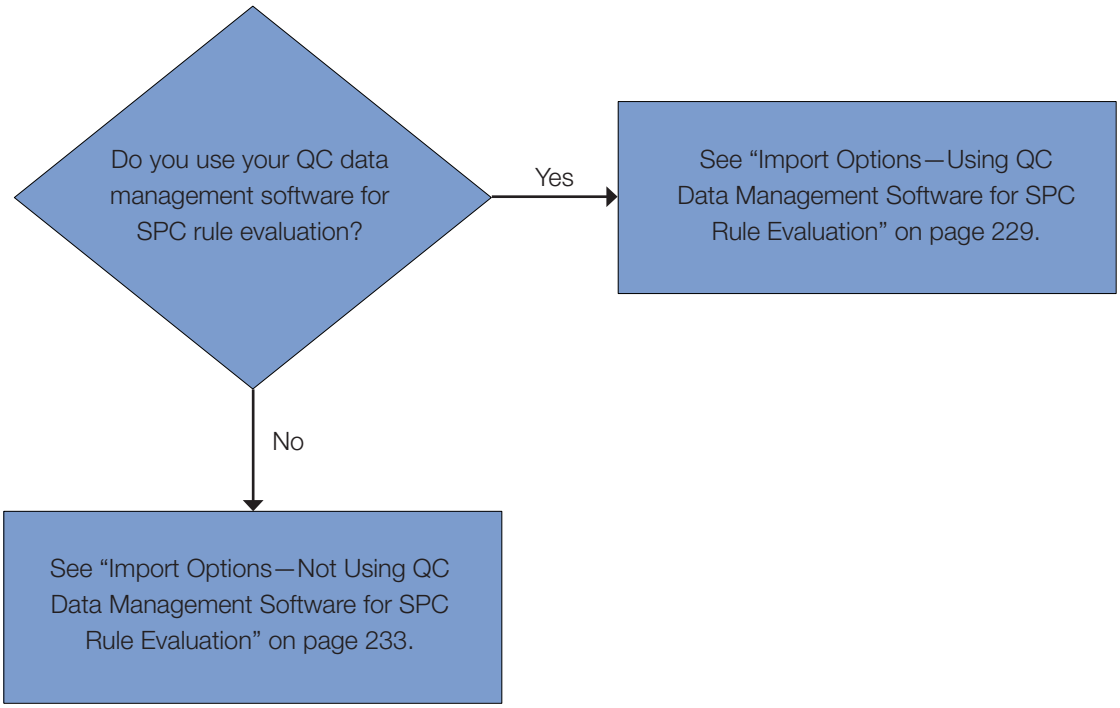
Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

You have configured a lot in UnityConnect using the **Default to All Lots** option, and the **Create new lots** check box is not selected on the **Import** dialog box.

Solution:

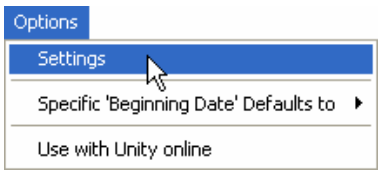
The solution to this error depends on your use of your QC data management software for SPC rule evaluation.



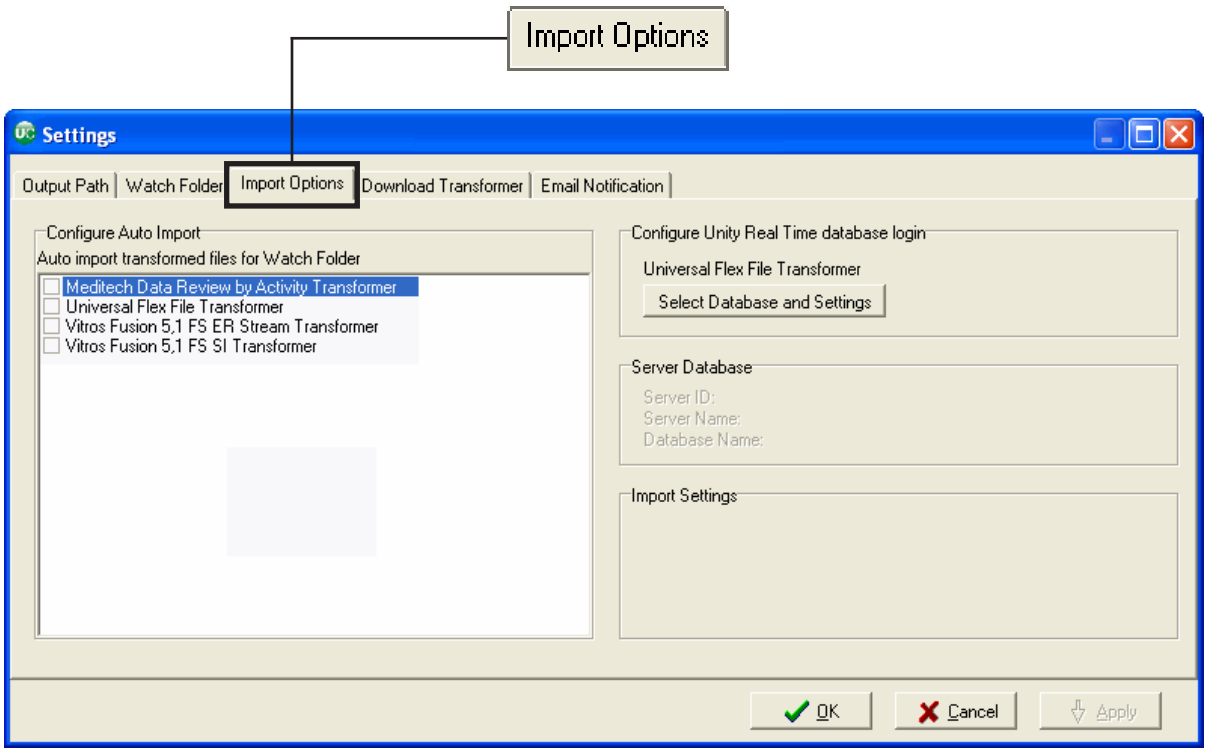
Import Options—Using QC Data Management Software for SPC Rule Evaluation

1 Start UnityConnect.

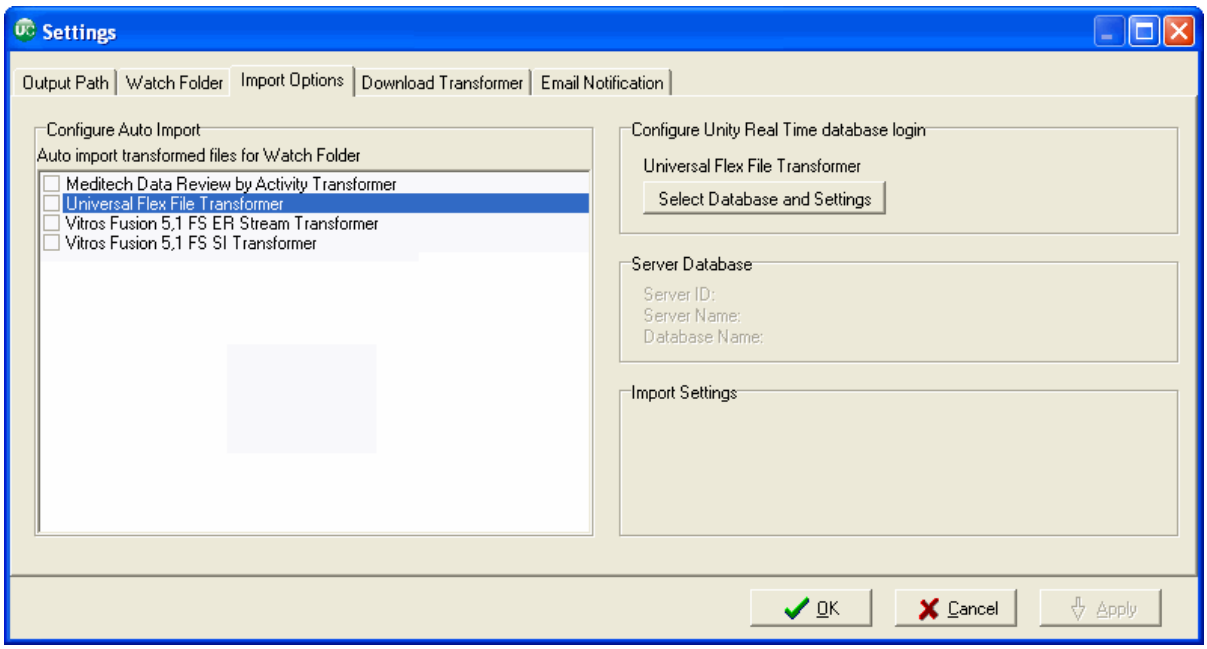
2 Click the **Options** menu and then click **Settings**.



3 Click the **Import Options** tab.

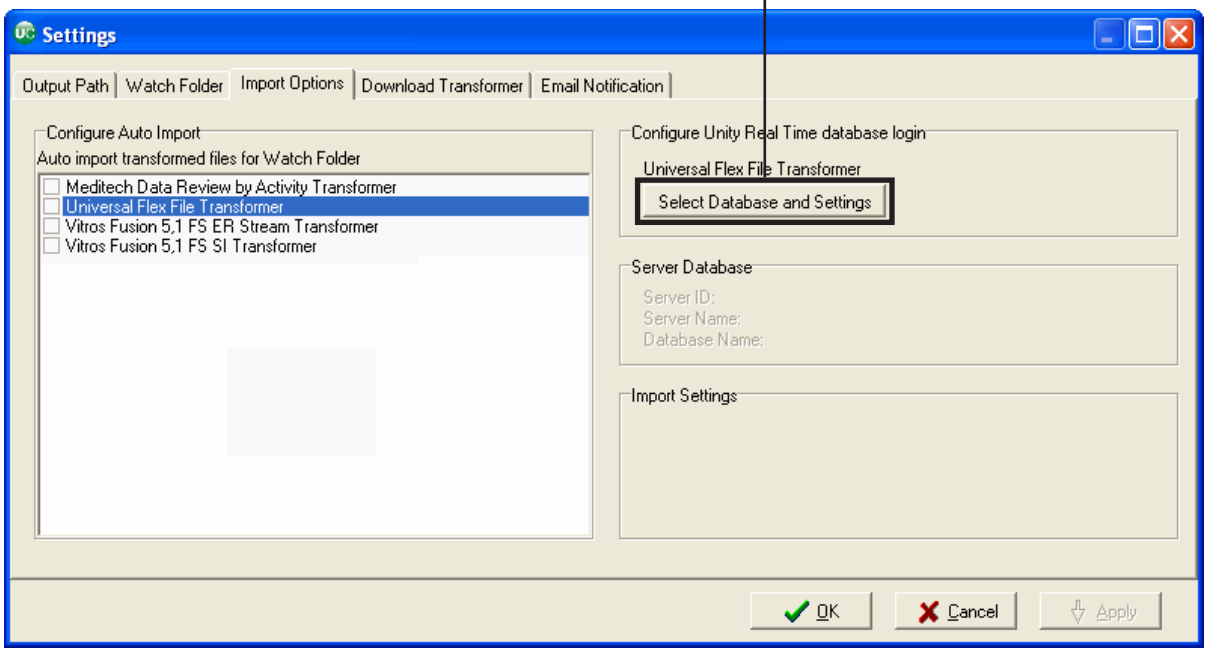


4 Select the transformer for which you want to configure import options.



Note: Do not select the check box for the transformer unless you want to set up automatic import. See “Configuring Automatic Import” on page 67 for more information.

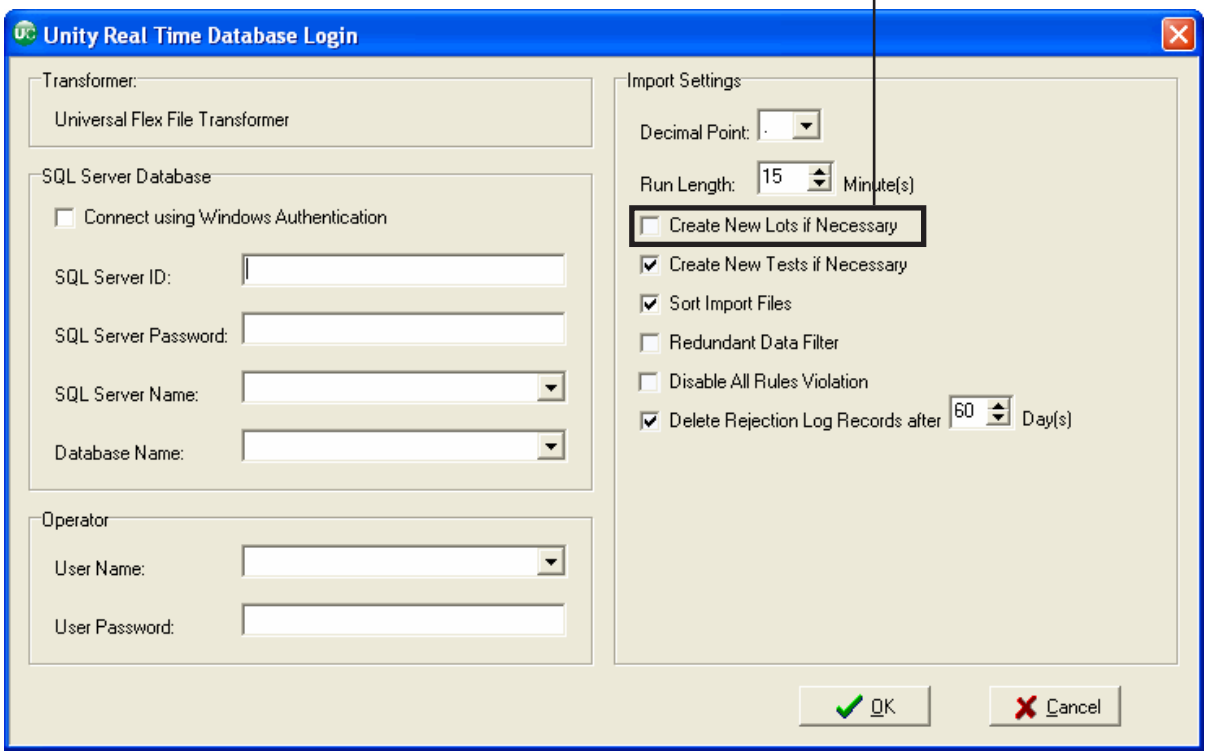
5 Click Select Database and Settings .



6 Make sure the **Create New Lots if Necessary** check box is not selected.

The following illustration shows recommended import settings for customers using their QC data management software for SPC rule evaluation.

The **Create New Lots if Necessary** check box is not selected.



This ensures UnityConnect will not create new lots when transforming and overwrite your current SPC rule settings in your QC data management software.

7 Type your password in the **User Password** field.

8 Click OK.

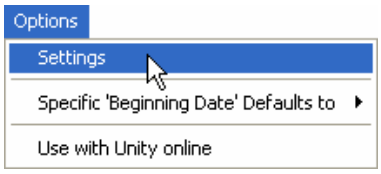
9 Click OK again.

To duplicate your current SPC rule settings from the current lot to the new lot, leave the Create New Tests if Necessary check box blank and duplicate the lot in your QC data management software before transforming data for the lot for the first time. See “Configuring a New Lot” on page 164 for more information.

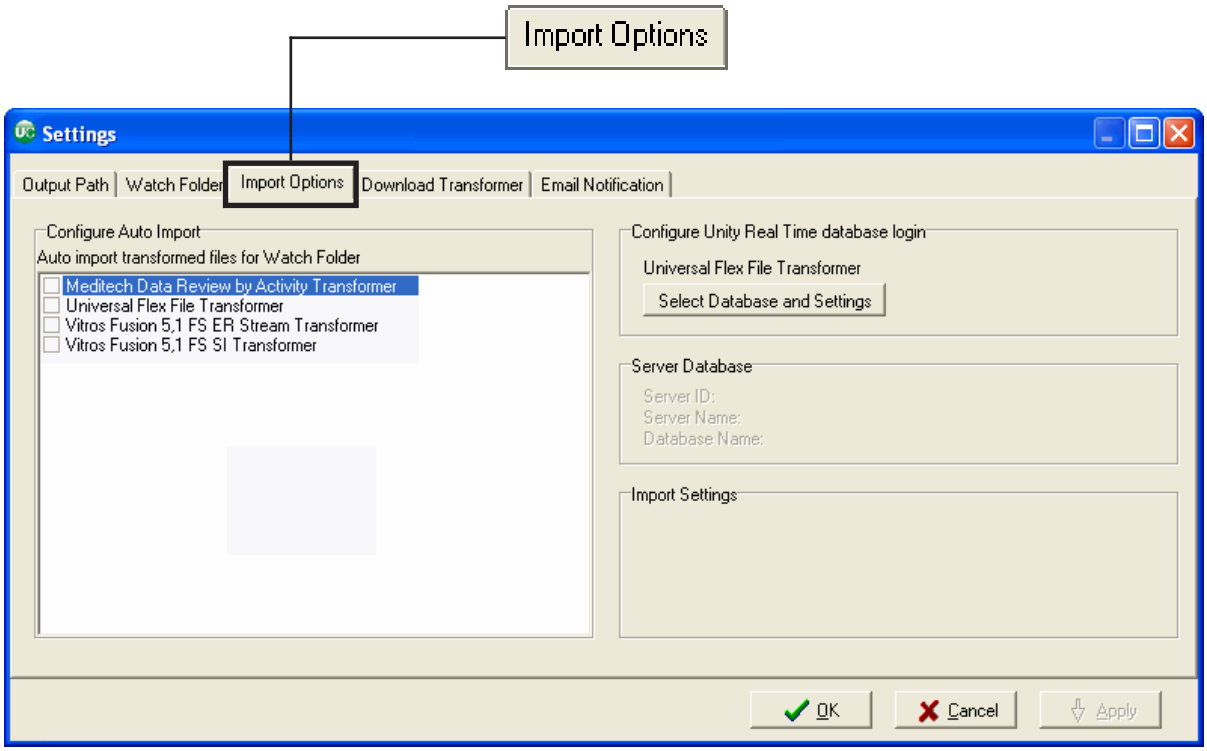
Import Options—Not Using QC Data Management Software for SPC Rule Evaluation

1 Start UnityConnect.

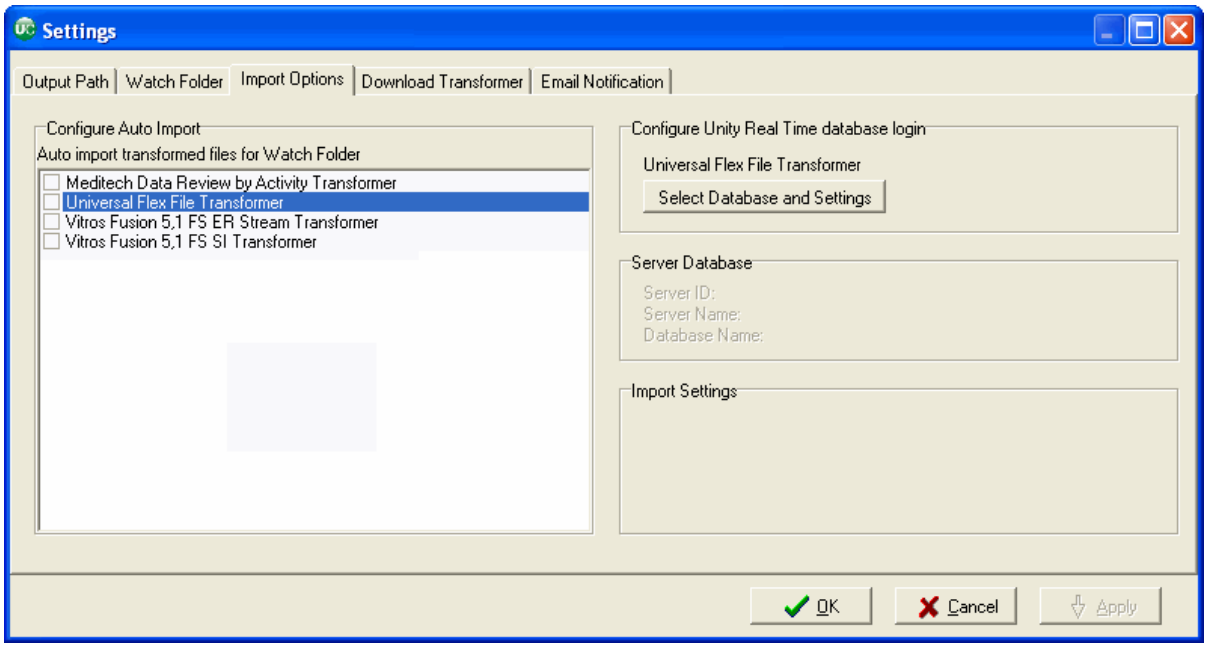
2 Click the **Options** menu and then click **Settings**.



3 Click the **Import Options** tab.

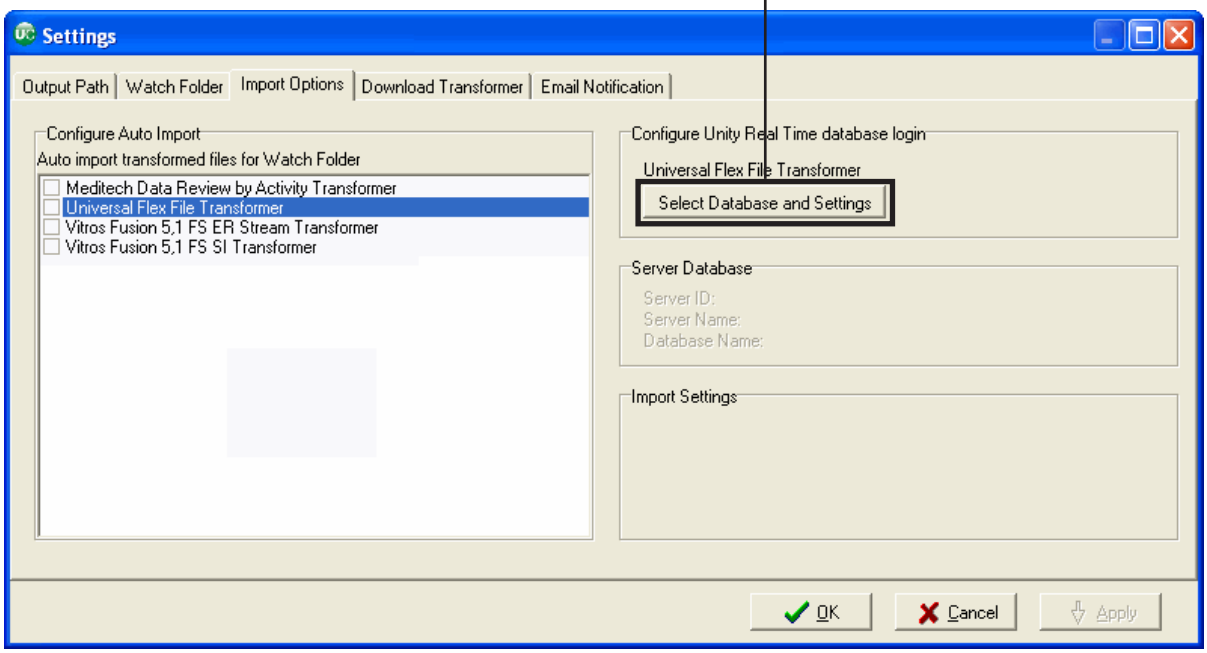


4 Select the transformer for which you want to configure import options.



Note: Do not select the check box for the transformer unless you want to set up automatic import. See “Configuring Automatic Import” on page 67 for more information.

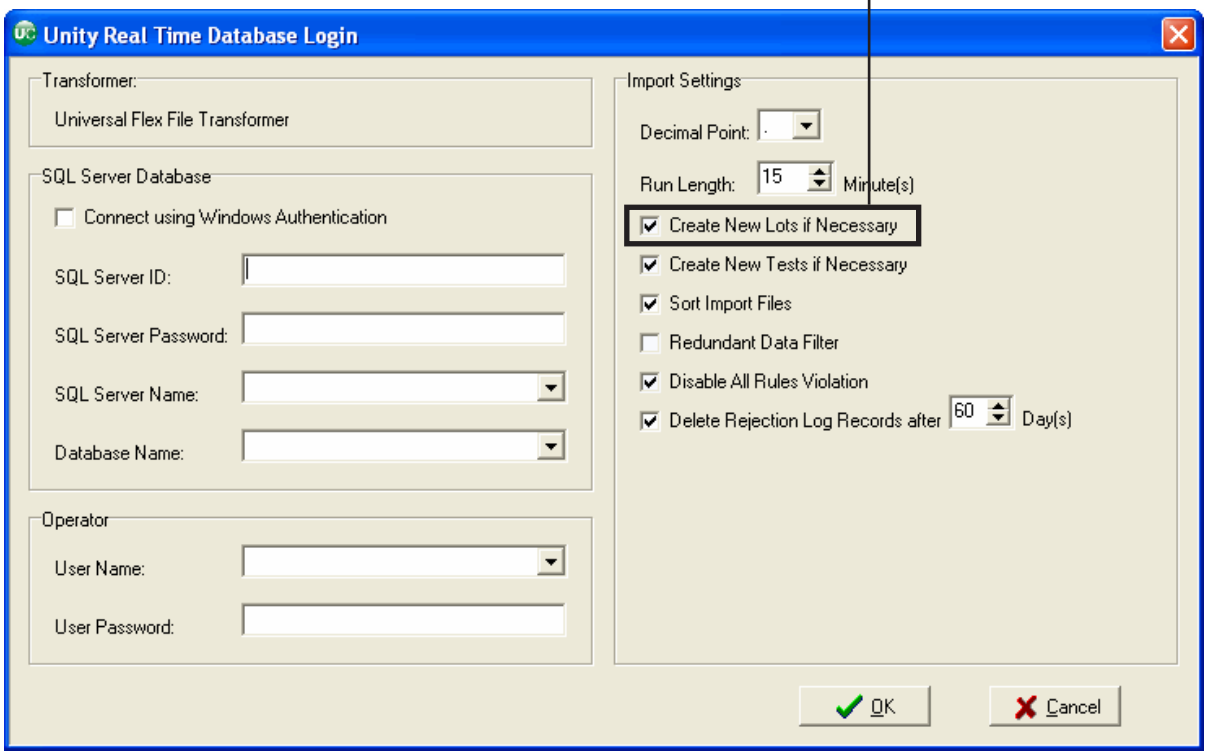
5 Click Select Database and Settings .



6 Make sure the **Create New Lots if Necessary** check box is selected.

The following illustration shows recommended import settings for customers not using their QC data management software for SPC rule evaluation.

Create New Tests if Necessary check box is selected.



7 Type your password in the **User Password** field.

8 Click OK.

9 Click OK again.

A new lot is automatically created when UnityConnect finds a new lot in your QC data file.

Error: Result invalid

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

Note: You cannot import data with a value of 0 (zero) or a negative numeric value into your QC data management software.

Note: The only exception is a value of 0 (zero) for a standard deviation when importing summary statistics.

Solution:

If the value is not a true zero but a value being rounded to zero, increase the number of decimal places being reported for the test.

1 Start your QC data management software.

2 Select the test or lot in the navigation tree.

3 Click 

in Unity Desktop or Unity Real Time.

4 Click the **Settings** tab.

5 Increase the decimal places setting for each level as needed.

6 Click 

.

7 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

8 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected on the **Import** dialog box, any data imported during the first transformation is rejected and appears in the Rejection Log as a “Data out of sequence” error.

9 Delete the Rejection Log.

Error: Time out of sequence

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

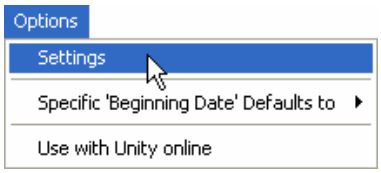
The data in the QC data file is not in sequential order, and the **Sort import files** check box is not selected on the **Import** dialog box.

Solution:

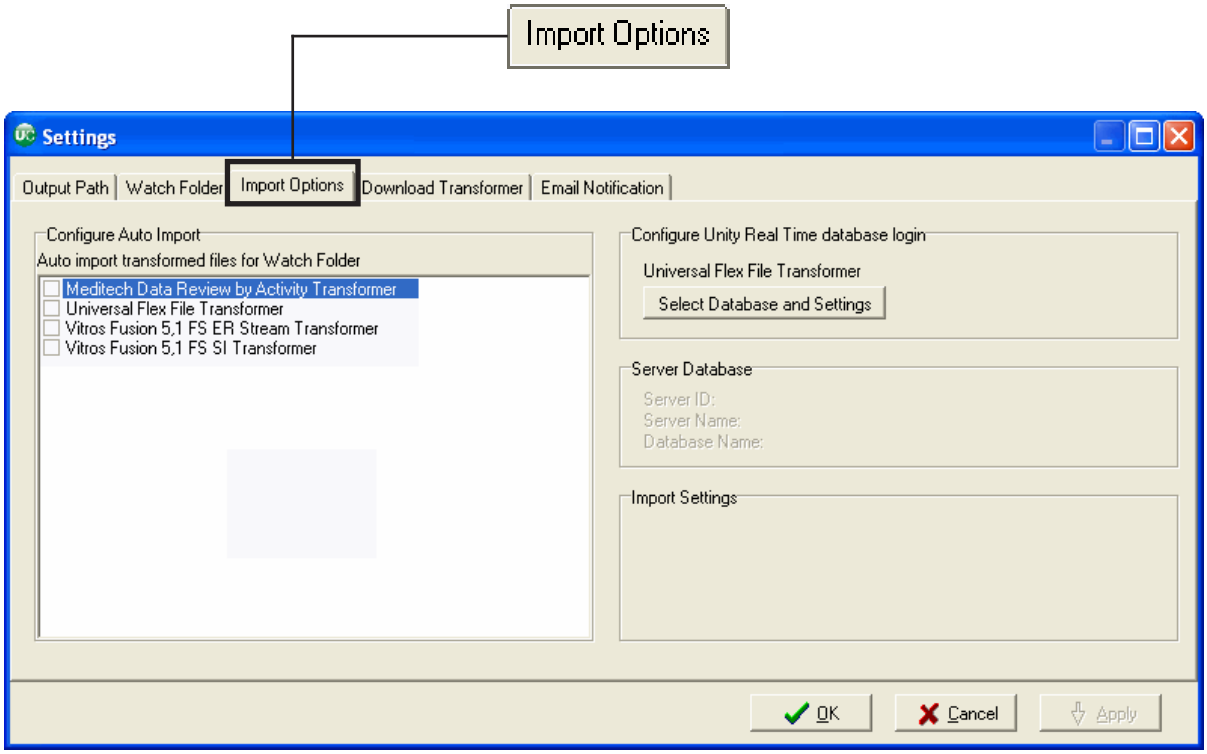
Files must be in sequential order for the data to be imported. Make sure the **Sort import files** check box is selected on the **Import** dialog box.

1 Start UnityConnect.

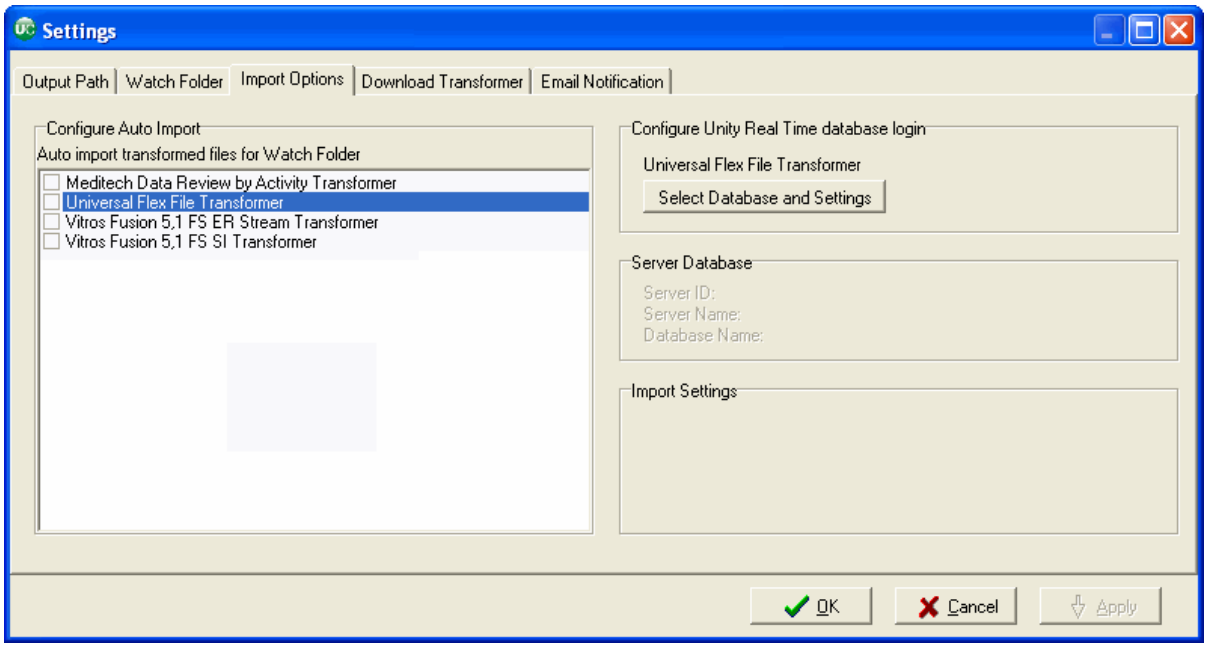
2 Click the **Options** menu and then click **Settings**.



3 Click the **Import Options** tab.

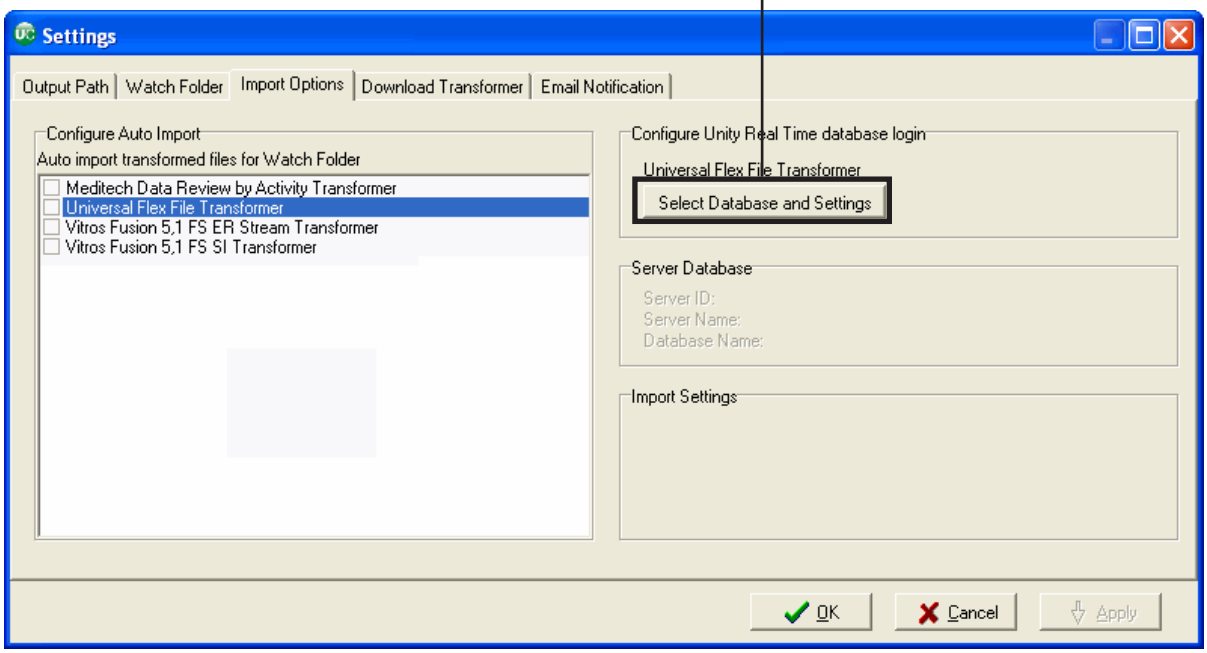


4 Select the transformer for which you want to configure import options.

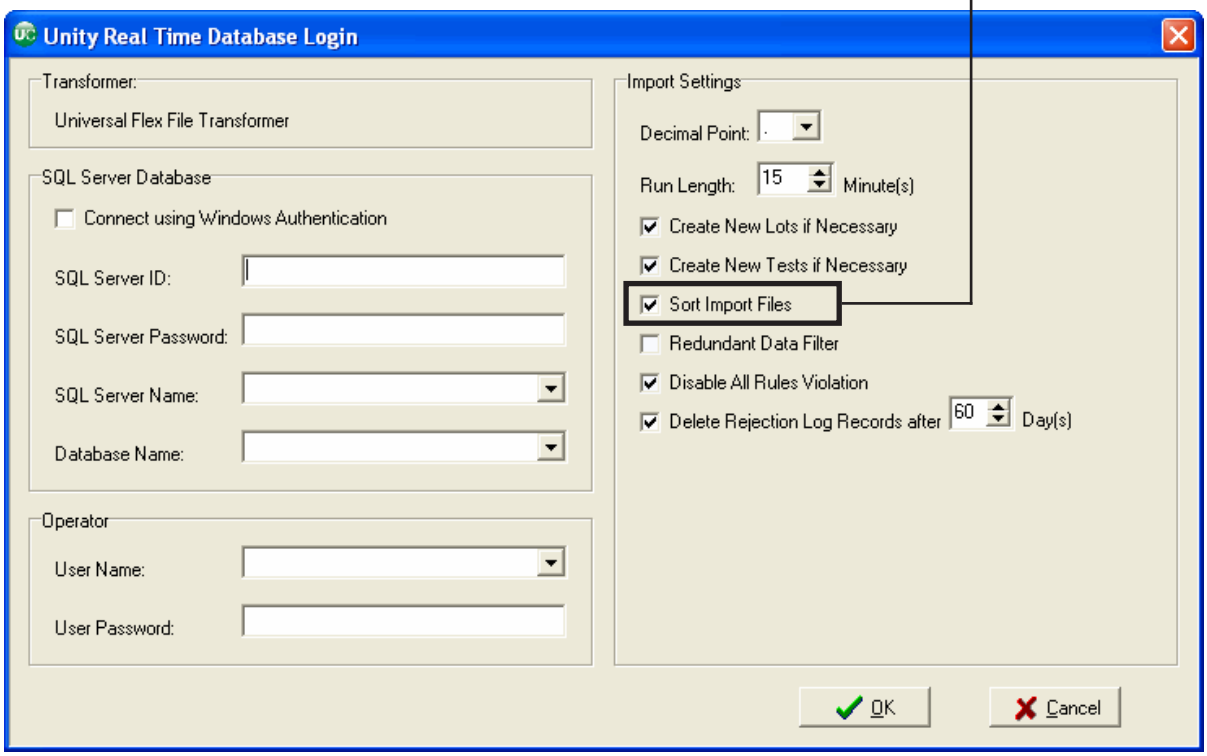


Note: Do not select the check box for the transformer unless you want to set up automatic import. See “Configuring Import Options” on page 68 for more information.

5 Click Select Database and Settings .



6 Select the **Sort Import files** check box.



7 Type your password in the **User Password** field.

8 Click OK.

9 Click OK again.

10 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

11 Review the Rejection Log.

If the Redundant data filter check box is not selected in the Import dialog box, any data imported during the first transformation is rejected and appears in the Rejection Log as a “Data out of sequence” error.

12 Delete the Rejection Log.

CHAPTER 13

Viewing the Rejection Log for Web-based Software

In This Chapter

Overview

Rejected data is transformed data that was not imported into your QC data management software. The Rejection Log shows the details of all rejected data and provides a description about why the data was rejected.

Important: The Rejection Log does not show data rejected due to an SPC rule violation, but rather only transformed data that was not imported into your QC data management software.

In most cases of rejected data, no action is required. However, in some instances an error message is an indication that configuration adjustments are required. After the configuration adjustments are made, the QC data file must be transformed again.

This chapter provides information on how to review the Rejection Log and determine the appropriate action based on the error message.

Before You Begin

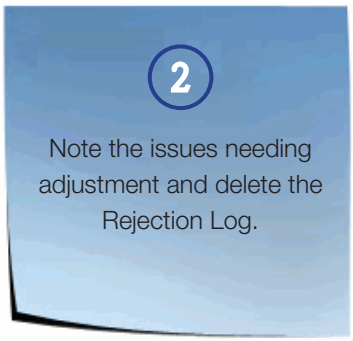
This chapter is only for customers using UnityConnect with either of the following **Web-based** software:

UnityWeb

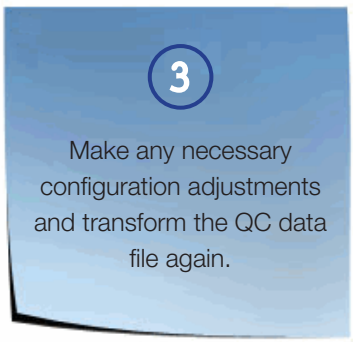
Unity Real Time online

Using the Rejection Log

See “Viewing the Rejection Log” on page 243.



See “Deleting the Rejection Log” on page 247.



See “Rejection Log Messages” on page 248.

Viewing the Rejection Log

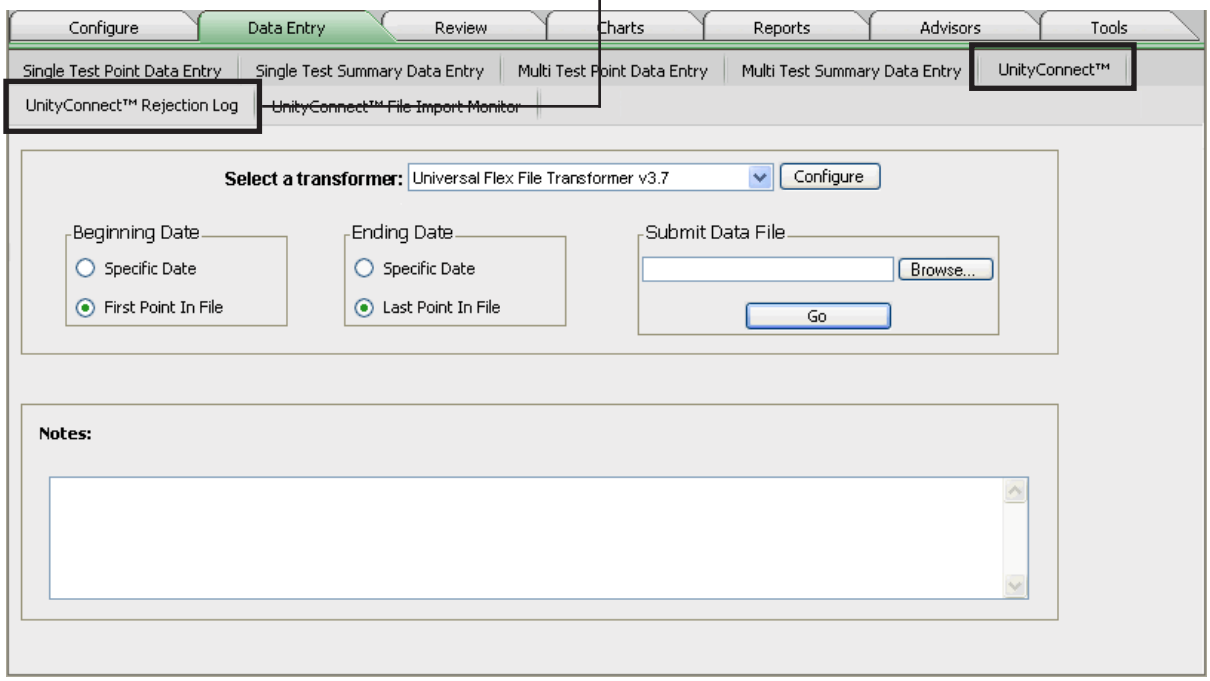
Best Practices—Review the Rejection Log by Error Type After Each Transformation

1 Log in to UnityWeb 2.0 or Unity Real Time online.

2 Click the **Data Entry** tab.

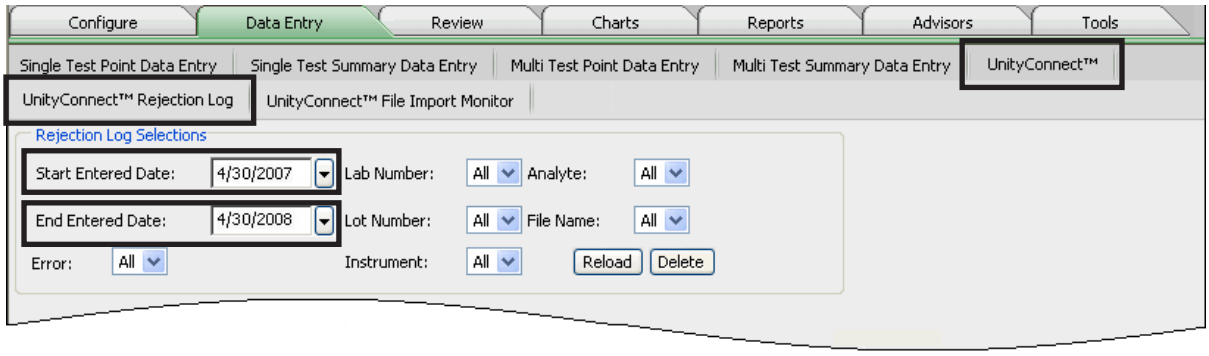
3 Click **UnityConnect**.

4 Click **UnityConnect Rejection Log**.



5 Click the arrows located to the right of the **Start Entered Date** and/or **End Entered Date** to select another date range to view.

Tip: The **End Entered Date** defaults to the current date. The **Start Entered Date** is exactly one year earlier. You typically do not need to change these dates.



6 Select the type of error from the **Error** list.

Tip: It is easiest to view the Rejection Log by each error type if the Rejection Log contains a large amount of information.

7 Select a lab number from the **Lab Number** list or select **All**.

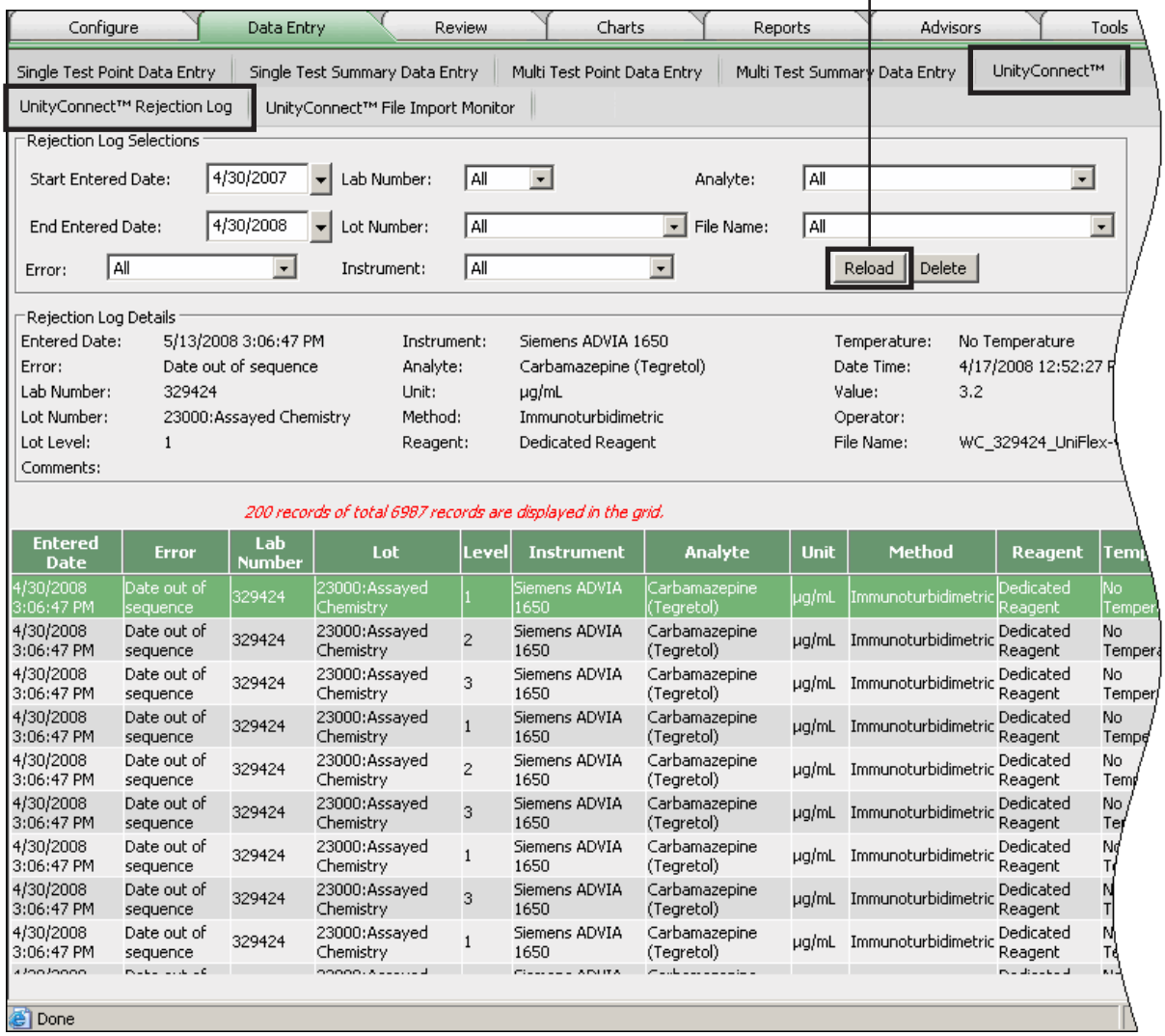
8 Select a lot number from the **Lot Number** list or select **All**.

9 Select an instrument from the **Instrument** list or select **All**.

10 Select an analyte from the **Analyte** list or select **All**.

11 Select a file name from the **File Name** list or select **All**.

12 Click **Reload** to refresh the Rejection Log and view your selected data.

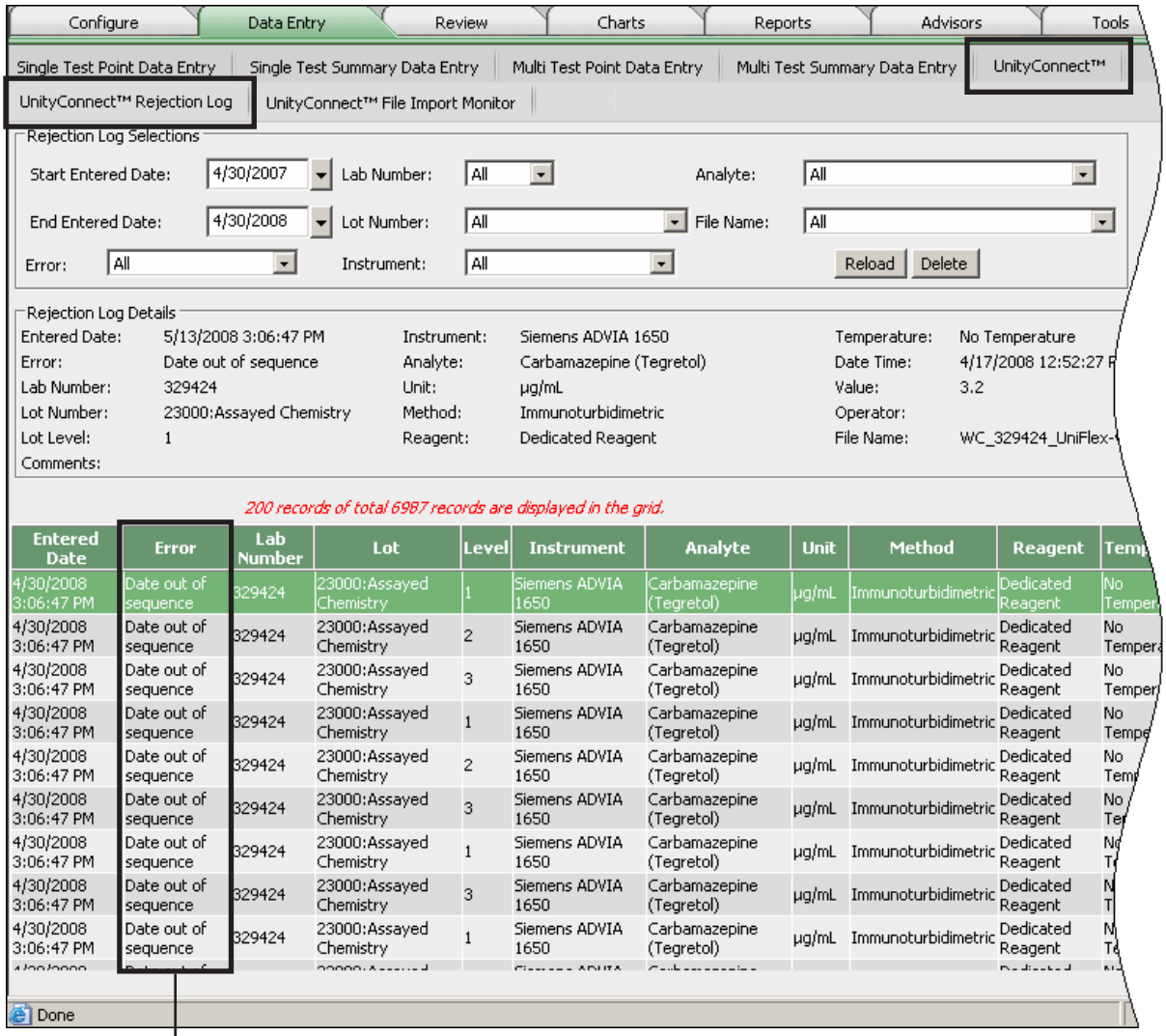


The Rejection Log appears according to the criteria you selected.

13 Review the Rejection Log paying special attention to the **Error** column.

The **Error** column indicates why the data was not imported.

> **Note**: See "Rejection Log Messages" on page 248 for a description of the message and information about resolving the message.



Error column

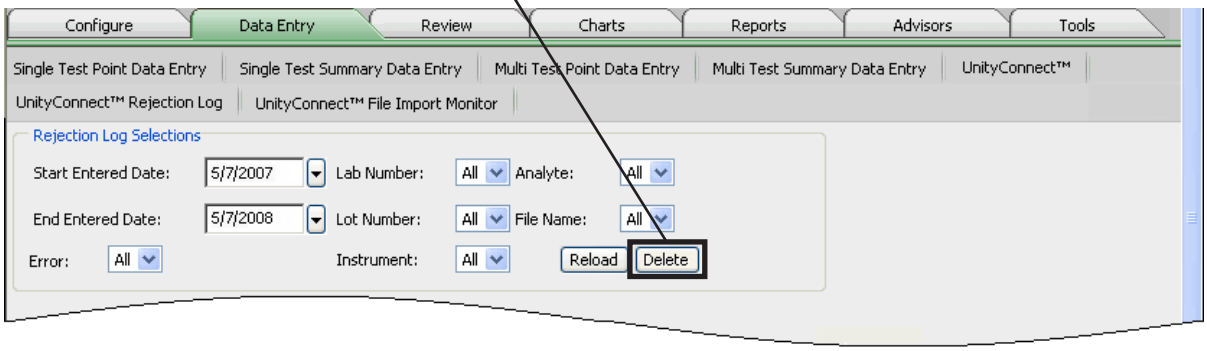
The error type should match the criteria you selected in step 4.

Deleting the Rejection Log

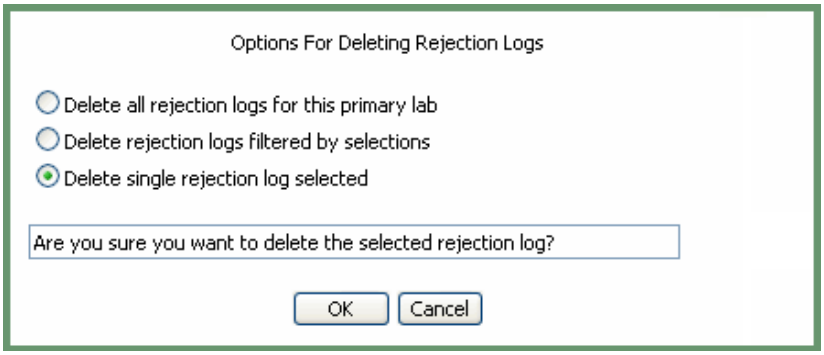
Best Practices—Note the Issues Needing Adjustment and Delete the Rejection Log

Bio-Rad recommends deleting the Rejection Log after each review to eliminate confusion.

1 Click Delete .



2 Select the option for the Rejection Log data you want to delete.



- **Delete all rejection logs for this primary lab**
- **Delete rejection logs filtered by selections**
- **Delete single rejection log selected**

3 Click OK .

Rejection Log Messages

The following are common Rejection Log messages. See the appropriate section for a description of the message and information about resolving the message.

Error: Create new tests if necessary is disabled

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

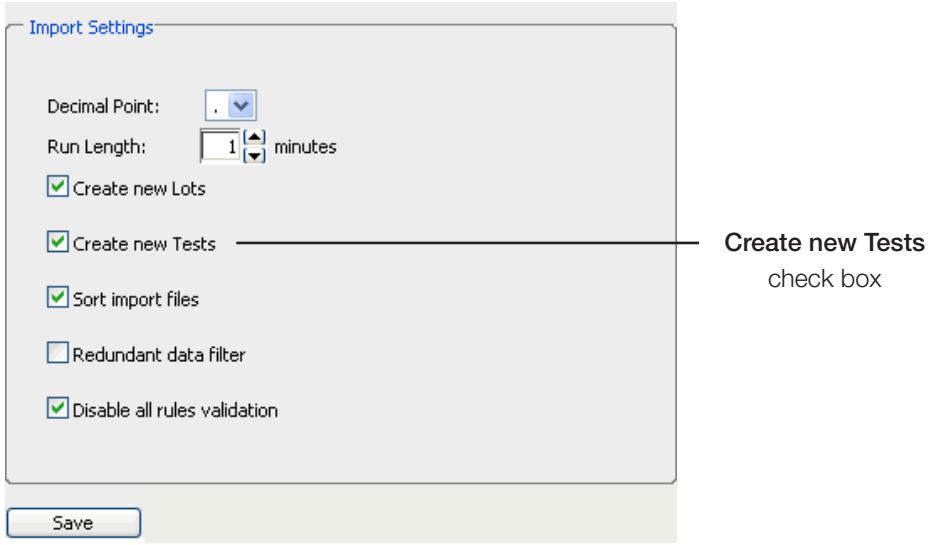
The **Create new Tests** check box is not selected. UnityConnect is not able to create the new test in your QC data management software so the associated data cannot be imported.

Solution:

Make sure the **Create new Tests** check box is selected in the Import Settings.

1. Log in to UnityWeb 2.0 or Unity Real Time online.
2. Click the **Tools** tab.
3. Click **Utilities**.
4. Click **Import Settings**.

5 Select the **Create new Tests** check box.



6 Click Save .

7 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

8 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

9 Delete the Rejection Log.

Error: Data entry locked for this test

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

UnityConnect is not able to import data for a test when the **Data Entry** dialog box is being accessed by a concurrent user of your QC data management software.

Solution:

Wait until the **Data Entry** dialog box is not being accessed by another user.

1 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

2 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

3 Delete the Rejection Log.

Error: Date out of sequence

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

This error occurs when you attempt to import data into your QC data management software out of chronological order. You can only import data with a testing date **after** the last date of data already in your QC data management software.

Typical Example:

You had a problem with your QC data on April 15, 16, and 17. In attempting to investigate the issue, you transformed a QC data file containing QC data for those three days (only) and UnityConnect automatically imported the data into your QC data management software.

On April 30 you transformed a QC data file containing **all** QC data for the month of April.

- All data points from April 1 through April 14 were rejected with a "Date out of sequence" error.
- Since data for April 15, 16, and 17 already exists, those data points were rejected as "Redundant data."
- All data points from April 18–30 imported successfully.

Solution:

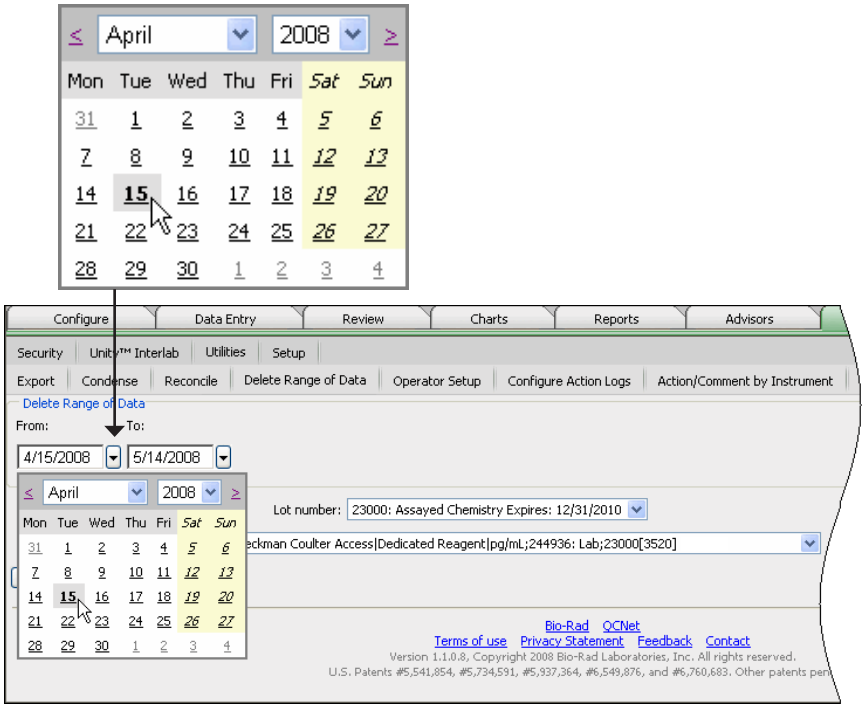
In order to import data points from April 1 through April 14, use the **Delete Range of Data** feature to delete data from April 15–30 before transforming the entire QC data file for April again.

1 Click the **Tools** tab.

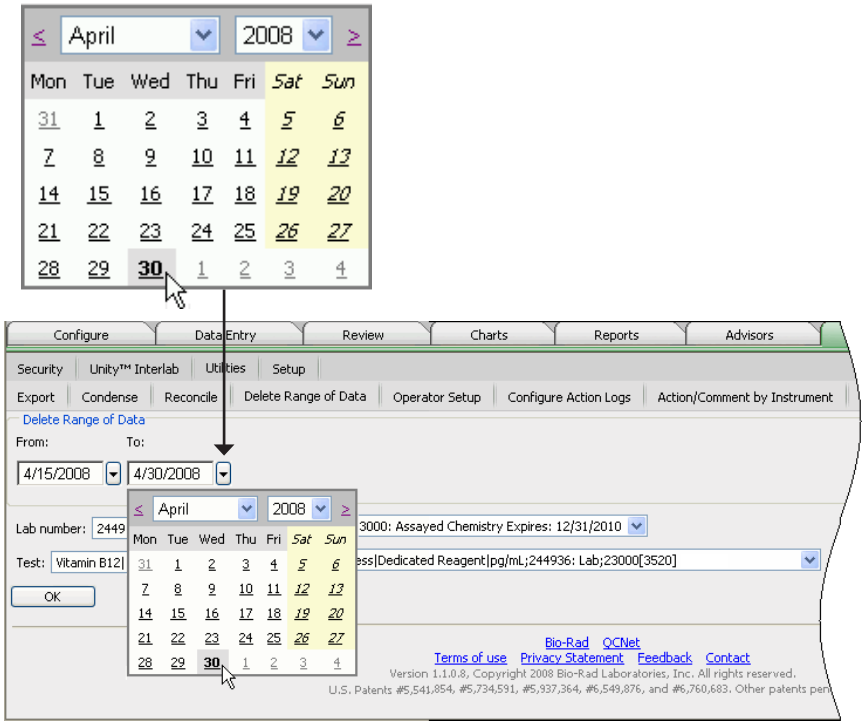
2 Click **Utilities**.

3 Click **Delete Range of Data**.

4 Click the arrow located to the right of the **From** date and select the beginning date for the range of data.



5 Click the arrow located to the right of the **To** date and select the ending date for the data.



6 Select the lab number from the **Lab number** list or select **All** to delete all data for the specific date range.

7 Select the lot number from the **Lot number** list or select **All**.

8 Select the test from the **Test** list or select **All**.

9 Click **OK**.

A message appears asking for confirmation.

Important: Extreme caution should be used when using the **Delete Range of Data** feature as deleting a range of data permanently removes the data from the software.

10 Click **OK**.

11 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

12 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

13 Delete the Rejection Log.

Error: Lab closed

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

The lab number corresponding to the data is closed in your QC data management software.

Solution:

You cannot import data into your QC data management software for a closed lab. Open the lab number in your QC data management software.

1 Click the **Configure** tab.

2 Click **Lab**.

3 Select the lab you want to open in the **Closed labs** list.

4 Click **Open**.

The lab number moves to the bottom of the **Open labs** list.

5 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

6 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during

the first transformation is rejected and appears in the Rejection Log as a “Data out of sequence” error.

7 Delete the Rejection Log.

Error: Lot closed

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

The lot number corresponding to the data is closed in your QC data management software.

Solution:

You cannot import data into your QC data management software for a closed lot. Open the lot number in your QC data management software.

1 Click the **Configure** tab.

2 Click **Lot**.

3 Make sure the correct number appears in the **Lab number** list if you have more than one lab number.

4 Select the lot you want to open in the **Closed lots** list.

5 Click **Open Lot**.

The lot moves to the bottom of the **Open lots** list.

6 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

7 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during the first transformation is rejected and appears in the Rejection Log as a “Data out of sequence” error.

8 Delete the Rejection Log.

Error: Lot expired

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

The lot number corresponding to the data is expired in your QC data management software.

Solution:

You cannot import data into your your QC data management software for an expired lot. No further action is required.

Error: Lot number undefined

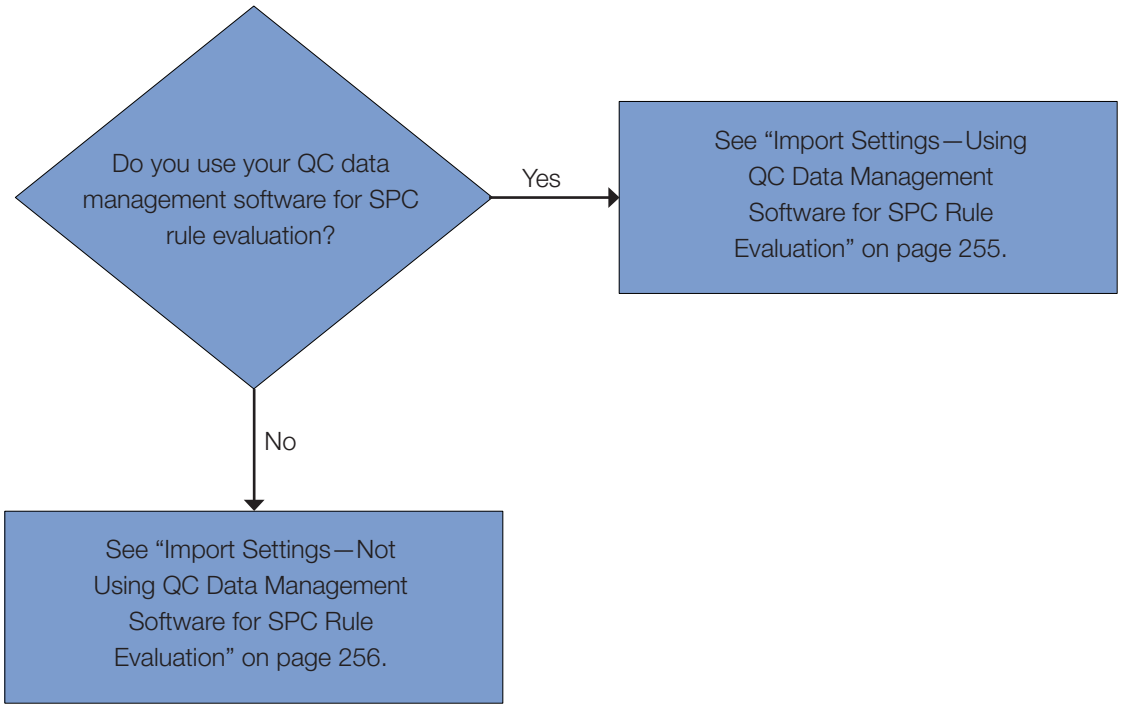
Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

You have configured a lot in UnityConnect using the **Default to All Lots** option, and the **Create new lots** check box is not selected in the Import Settings.

Solution:

The solution to this error depends on your use of your QC data management software for SPC rule evaluation.



Import Settings—Using QC Data Management Software for SPC Rule Evaluation

These settings ensure UnityConnect will not create new lots when transforming and overwrite your current SPC rule settings in your QC data management software.

To duplicate your current SPC rule settings from the current lot to the new lot, leave the **Create new Lots** check box blank and duplicate the lot in your QC data management software before transforming data for the lot for the first time. See “Configuring a New Lot” on page 164 for more information.

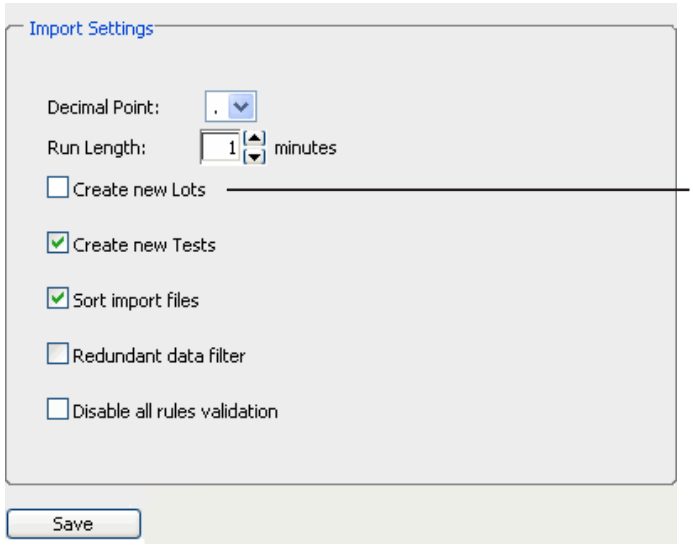
1 Log in to the UnityWeb 2.0 or Unity Real Time online software.

2 Click the **Tools** tab.

3 Click **Utilities**.

4 Click **Import Settings**.

The following illustration shows recommended import settings for customers using UnityWeb 2.0 or Unity Real Time online for SPC rule evaluation.



Import Settings—Not Using QC Data Management Software for SPC Rule Evaluation

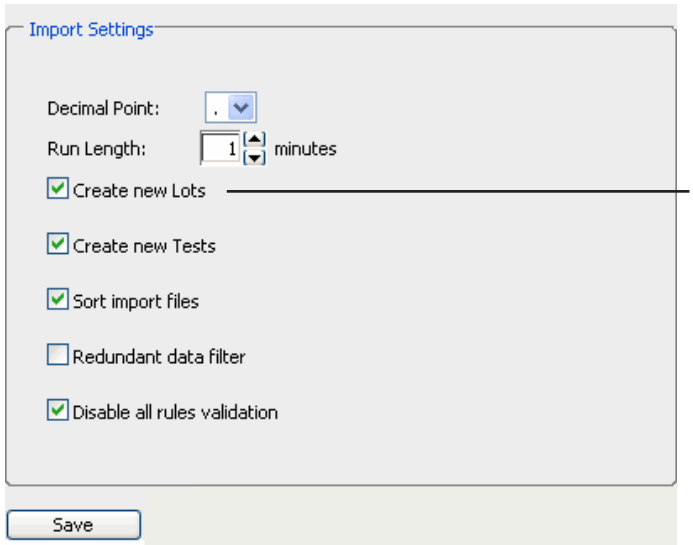
1 Log in to the UnityWeb 2.0 or Unity Real Time online software.

2 Click the **Tools** tab.

3 Click **Utilities**.

4 Click **Import Settings**.

The following illustration shows recommended import settings for customers who do not use UnityWeb 2.0 or Unity Real Time online for SPC rule evaluation.



Error: Result invalid

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

Note: You cannot import data with a value of 0 (zero) or a negative numeric value into your QC data management software.

Note: The only exception is a value of 0 (zero) for a standard deviation when importing summary statistics.

Solution:

If the value is not a true zero but a value being rounded to zero, increase the number of decimal places being reported for the test.

1 Click the **Configure** tab.

2 Click **Rules/Settings**.

3 Click the **Settings** tab.

4 Increase the decimal places setting for each level as needed.

5 Click 

.

6 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

7 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during the first transformation is rejected and appears in the Rejection Log as a "Data out of sequence" error.

8 Delete the Rejection Log.

Error: Time out of sequence

Important: Remember, you have already noted the necessary configuration adjustments and deleted the Rejection Log.

Description:

The data in the QC data file is not in sequential order, and the **Sort import files** check box is not selected in the Import Settings.

Solution:

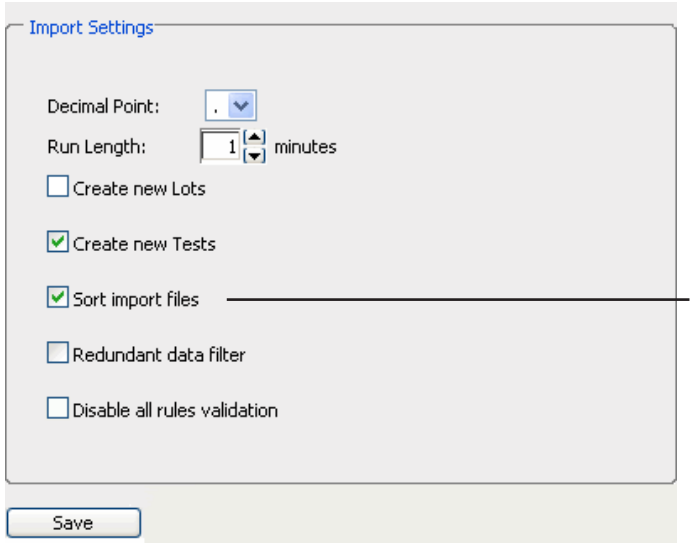
Files must be in sequential order for the data to be imported. Make sure the **Sort import files** check box is selected in the Import Settings.

1 Click the **Tools** tab.

2 Click **Utilities**.

3 Click **Import Settings**.

4 Select the **Sort import files** check box.



5 Click Save .

6 Transform the QC data file again.

Data that was not imported during the first import now imports into your QC data management software.

7 Review the Rejection Log.

If the **Redundant data filter** check box is **not** selected in the Import Settings, any data imported during the first transformation is rejected and appears in the Rejection Log as a “Data out of sequence” error.

8 Delete the Rejection Log.

CHAPTER 14

Viewing Watch Folder Logs

In This Chapter

Overview

Watch Folder Logs store historical information about the files transformed using a Watch Folder. The logs are helpful to confirm transformation and uploading (import) of your QC data files and can be used to troubleshoot any problems.

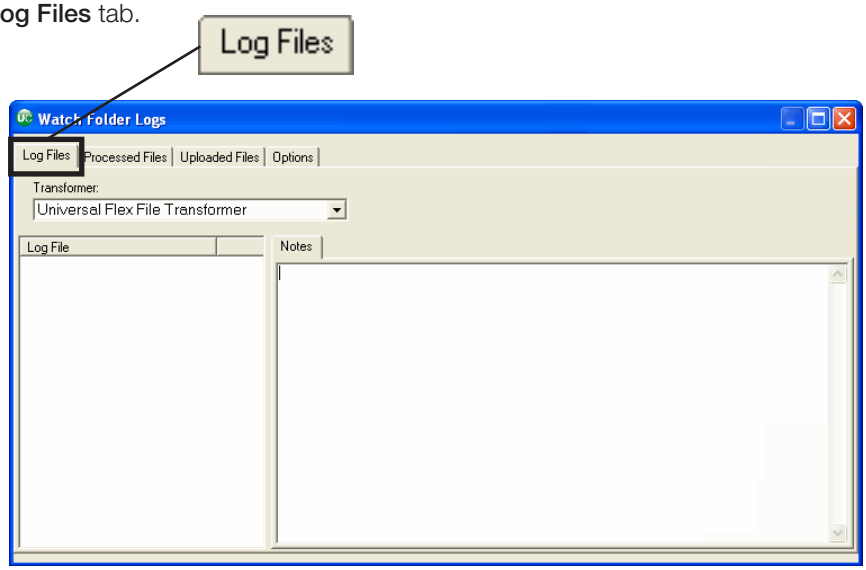
Viewing Log Files

The **Log Files** tab shows general information about the transformed QC data file.

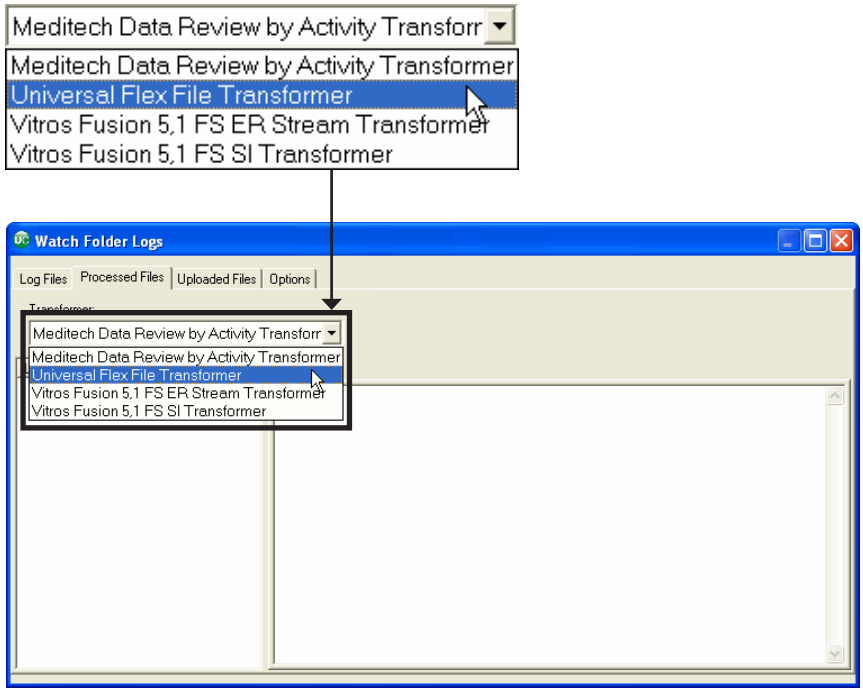
1 Start UnityConnect.

2 Click the **Logs** menu and then click **Watch Folder Logs**.

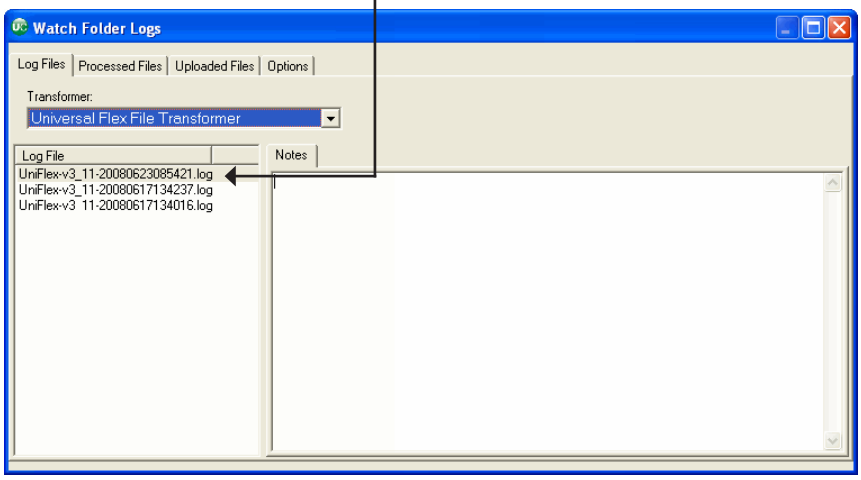
3 Click the **Log Files** tab.



4 Select a transformer from the list.



5 Select the log file you want to view.

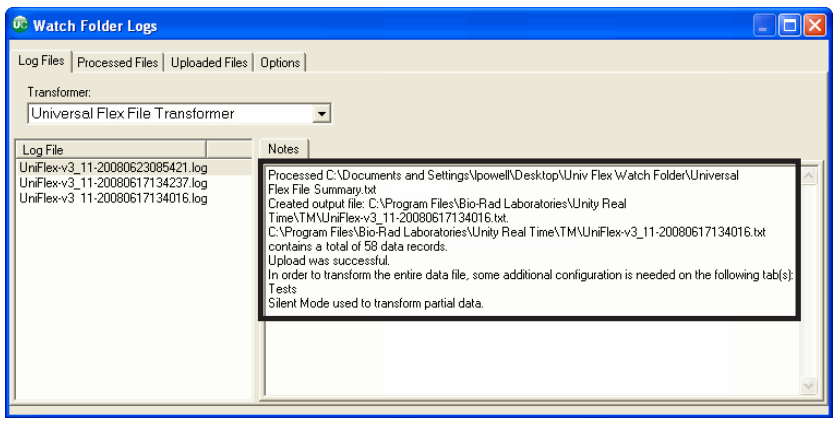


Note: The files are listed in chronological order with the most recent file at the top of the list. The first eight digits of the log file number indicate the date the QC data file was transformed and appears in the format of YYYYMMDD.

The **Notes** section shows the following information:

- The name and path of the processed data file.
- The name and path of the output file (transformed data file).
- Number of data records in the the output file.
- Status of the upload/import process.
- Indication if reprocessing of this file is/was required due to additional configuration.

Note: See "Configuring a Watch Folder" on page 64 for information about using Silent Mode with desktop QC data management software and "Configuring a Watch Folder" on page 64 for information about using Silent Mode with Web-based QC data management software.



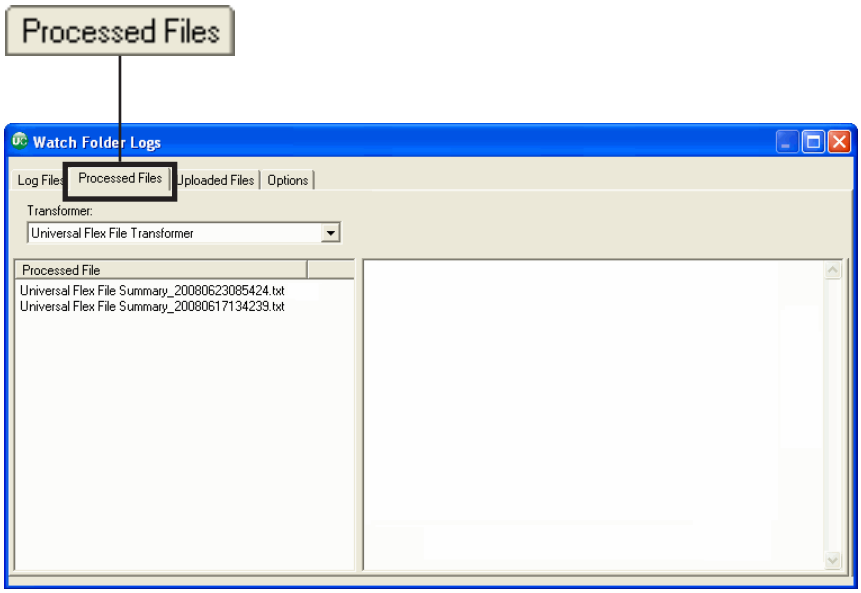
Viewing Processed Files

The **Processed Files** tab shows the contents of the transformed QC data file.

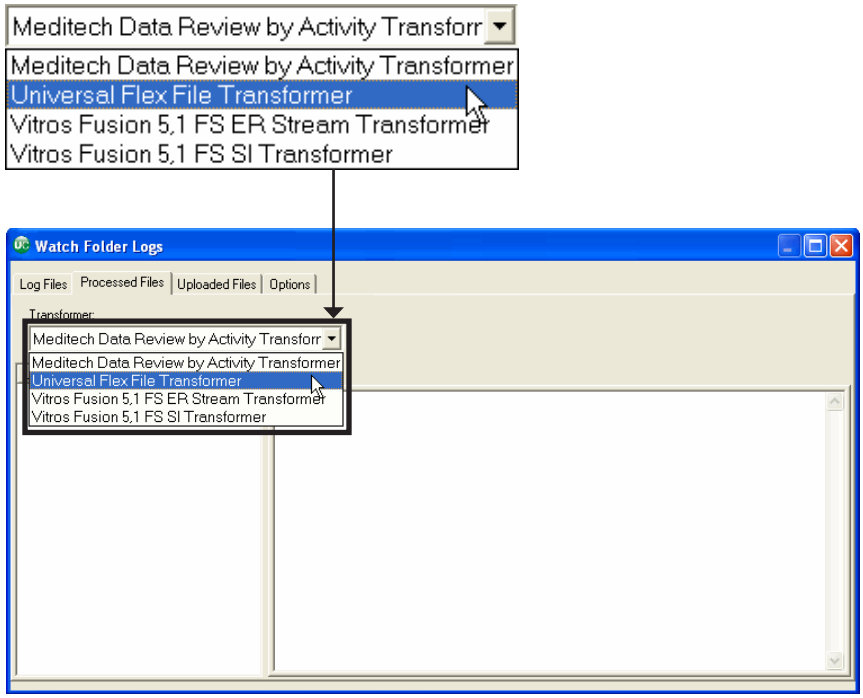
1 Start UnityConnect.

2 Click the **Logs** menu and then click **Watch Folder Logs**.

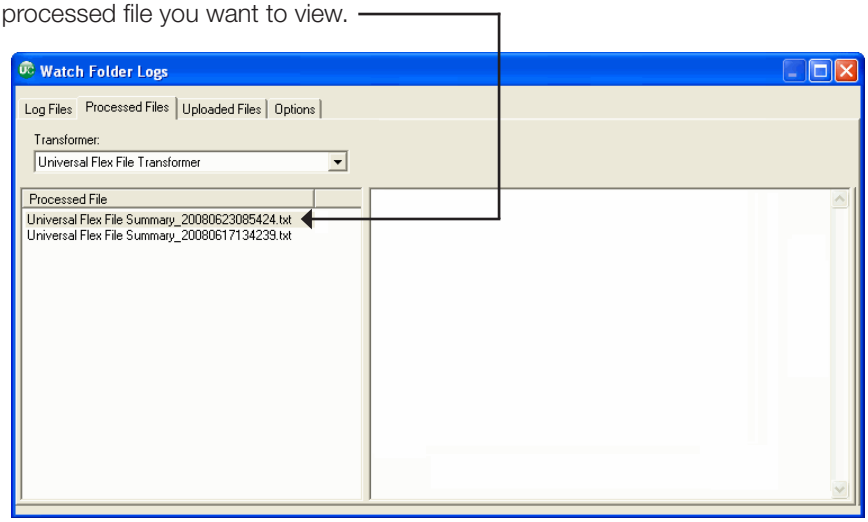
3 Click the **Processed Files** tab.



4 Select a transformer from the list.

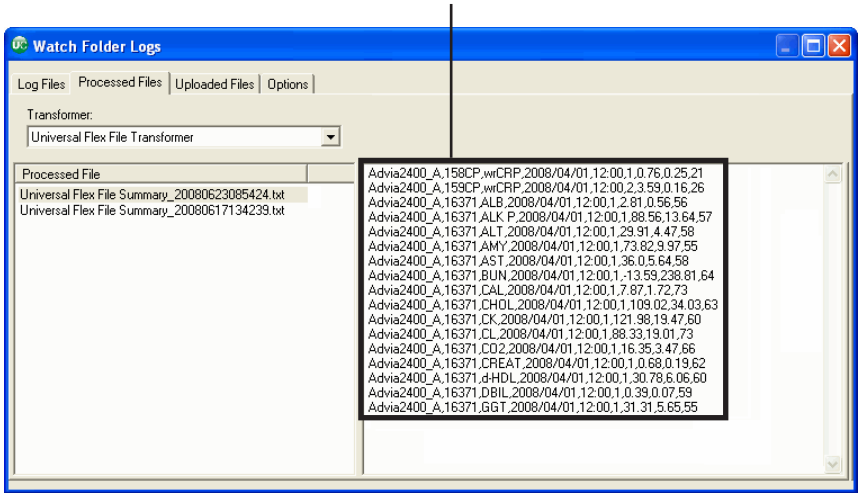


5 Select the processed file you want to view.



Note: The files are listed in chronological order with the most recent file at the top of the list. The first eight digits of the log file number indicate the date the QC data file was transformed and appears in the format of YYYYMMDD.

The contents of the transformed QC data file are shown.



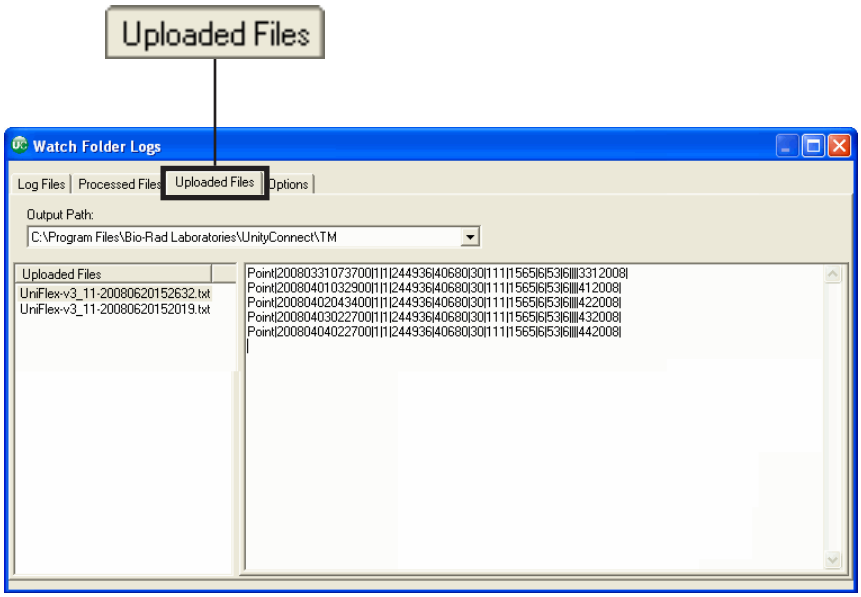
Viewing Uploaded Files

The **Uploaded Files** tab shows the contents of the uploaded (or imported) QC data file.

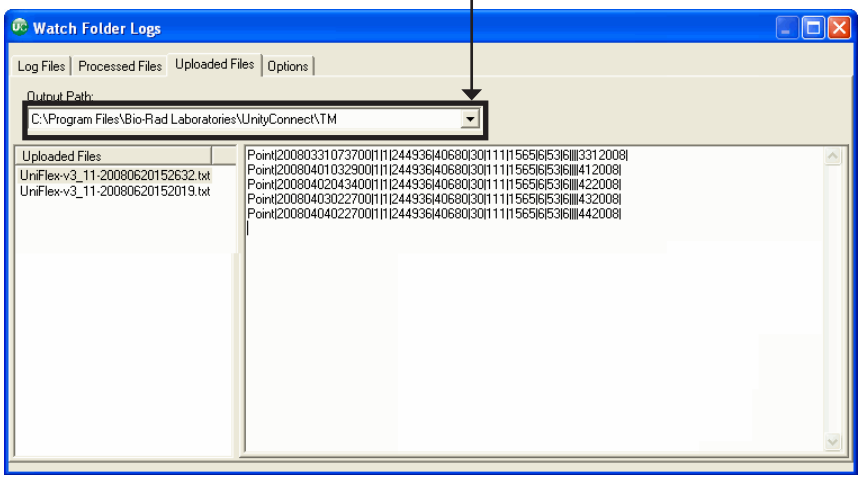
1 Start UnityConnect.

2 Click the **Logs** menu and then click **Watch Folder Logs**.

3 Click the **Uploaded Files** tab.

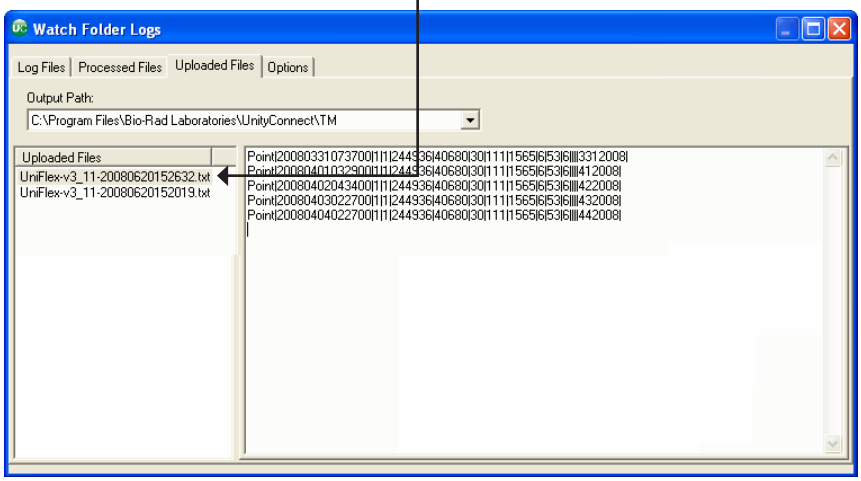


4 Select an output path from the list.



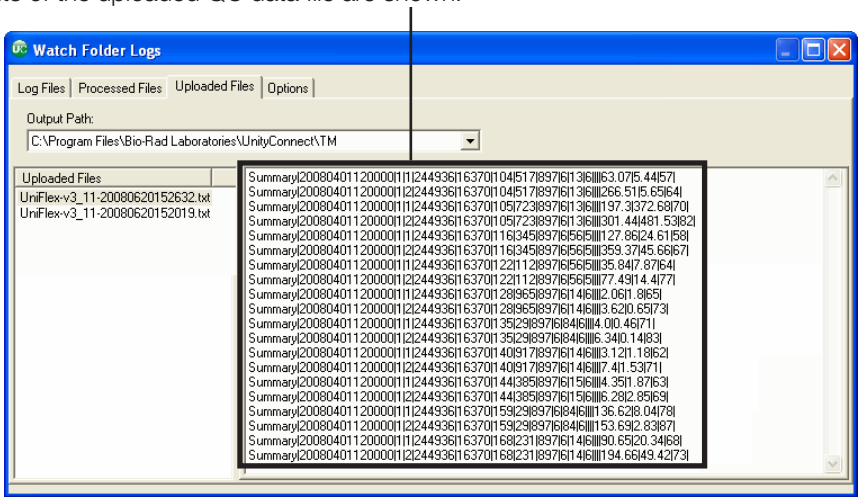
Note: The output path is the path to the folder where the transformed QC data files were created.

5 Select the uploaded file you want to view.



Note: The files are listed in chronological order with the most recent file at the top of the list. The first eight digits of the log file number indicate the date the QC data file was transformed and appears in the format of YYYYMMDD.

The contents of the uploaded QC data file are shown.



Selecting Log Options

Use the **Options** tab to specify the frequency for log files, processed files, and imported files to be deleted.

Cleaning Files Automatically

UnityConnect deletes the files immediately after transforming if the **Automatically Clean After Transformation** option is selected. The files are deleted according to the **Limit Files to** option selected.

Example:

- UnityConnect transforms a QC data file on 06-25-2008 at 10:33 AM.
- The **Days to Keep Recent Files** option is 3 days.

UnityConnect reads each of the directories containing previously processed files and deletes any file that was created before 06-22-2008 at 10:33 AM (that is, more than 3 days old).

Limit Files to Options

Select an option for the files you want to keep:

- **Day to Keep Recent Files**

  Select the number of days you want to keep the most recent files.

- **Keep Total Files**

  Select the number of total files you want to keep.

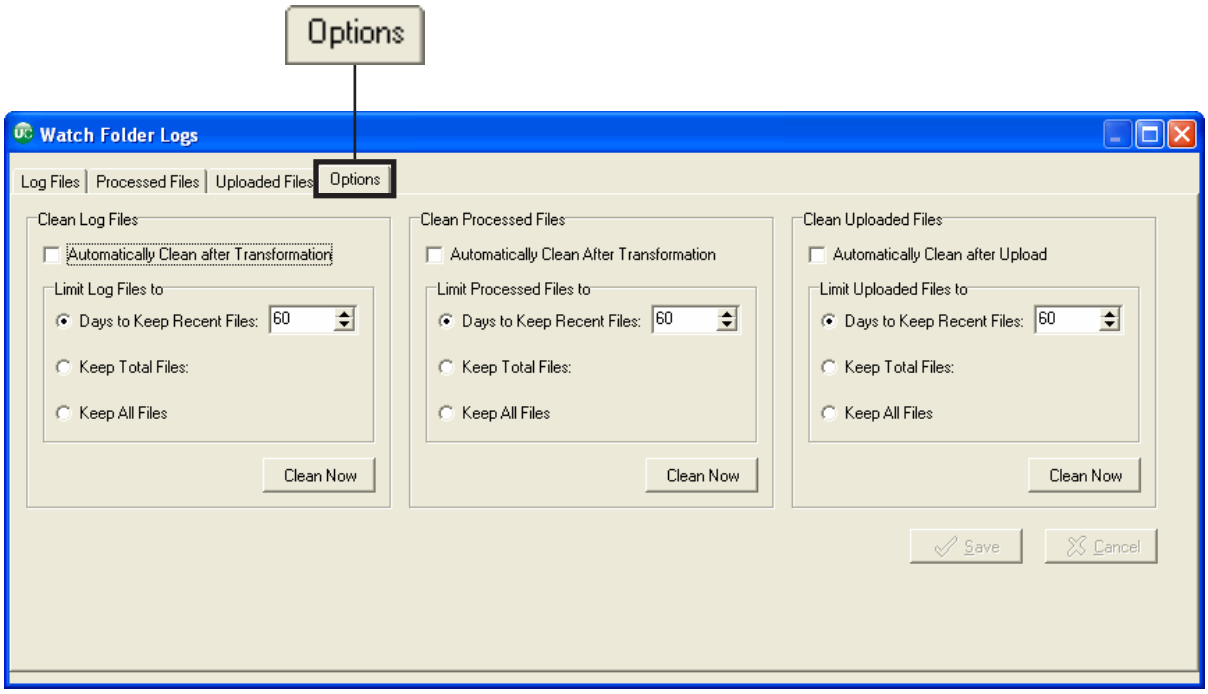
- **Keep All Files**

  Select this option to not delete any files.

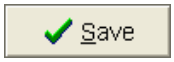
1 Start UnityConnect.

2 Click the **Logs** menu and then click **Watch Folder Logs**.

3 Click the **Options** tab.



4 Select the options you want.

5 Click 

.

UnityConnect cleans any files according to the Limit Files to option selected.

Cleaning Log Files Manually

UnityConnect deletes the log files when you click 

. The log files are deleted according to the **Limit Files to** option selected.

Example:

- UnityConnect transforms a QC data file on 06-25-2008 at 10:33 AM.
- The **Days to Keep Recent Files** option is 3 days.

UnityConnect reads each of the directories containing previously processed files and deletes any file that was created before 06-22-2008 at 10:33 AM (that is, more than 3 days old).

Limit Files to Options

Select an option for the files you want to keep:

- **Day to Keep Recent Files**

  Select the number of days you want to keep the most recent files.

- **Keep Total Files**

  Select the number of total files you want to keep.

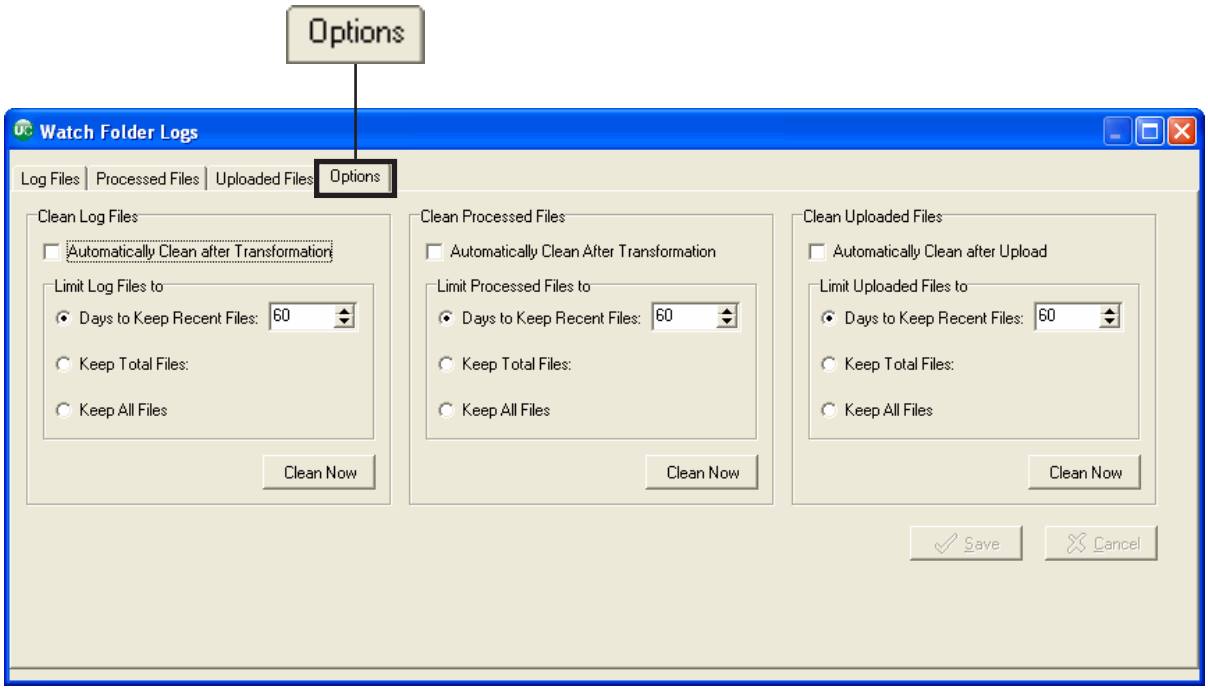
- **Keep All Files**

  Select this option to not delete any files.

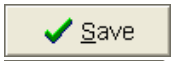
1 Start UnityConnect.

2 Click the **Logs** menu and then click **Watch Folder Logs**.

3 Click the **Options** tab.



4 Select the options you want.

5 Click 

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6 Click 

UnityConnect immediately cleans any files according to the Limit Files to option selected.

CHAPTER 15

Backup and Restore

In This Chapter

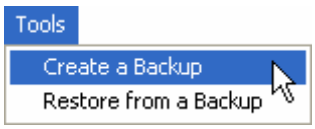
Overview

UnityConnect has a backup utility to help prevent loss of your transformer configuration. Bio-Rad recommends performing a backup every time a new QC item (lab, instrument, lot, test) is configured in your transformer. The backup file can be used to restore your transformer's configuration in the event of a power or system failure.

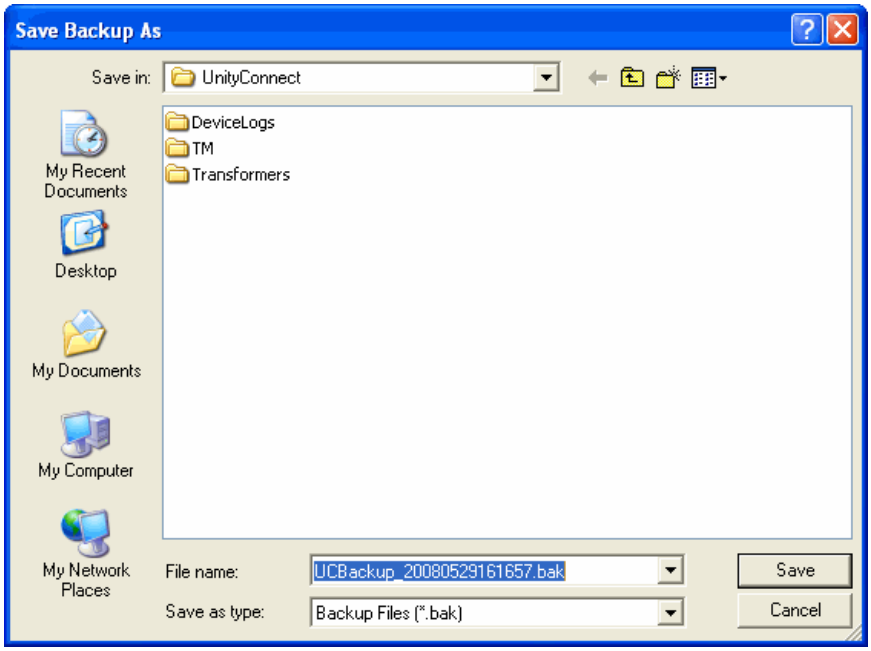
Important: The backup utility only backs up your transformer's configuration. The backup utility does not back up your QC data. See the Reference Guide or Online Help for your QC data management software for information about backing up your QC data.

Backing Up Data

1 Point to the **Tools** menu and then click **Create a Backup**.



2 The **Save Backup As** dialog box appears.



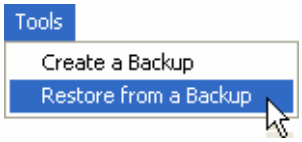
3 Click Save .

A message appears stating the backup was successful.

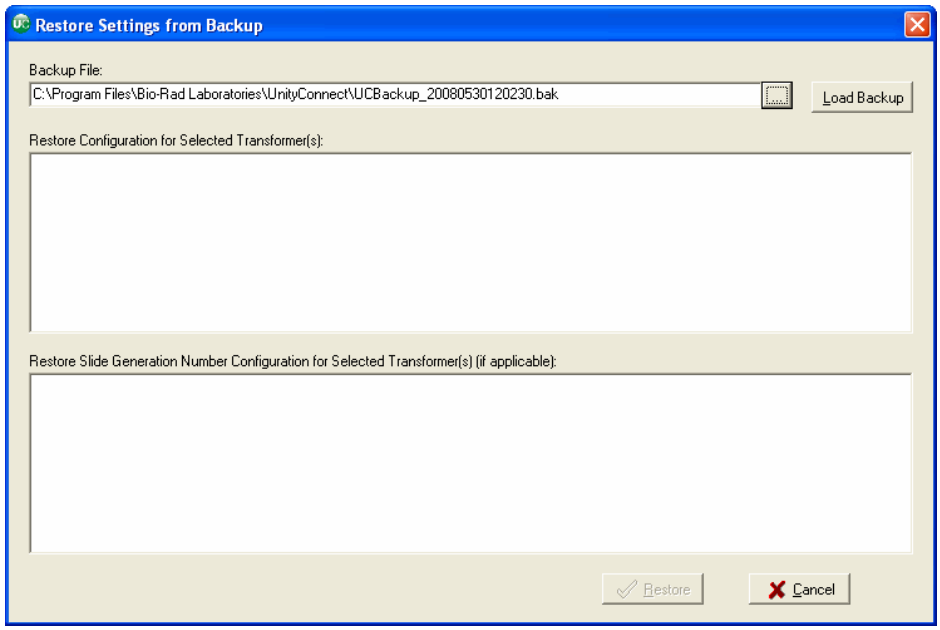
4 Click OK .

Restoring Data from a Backup

1 Point to the **Tools** menu and then click **Restore from a Backup**.

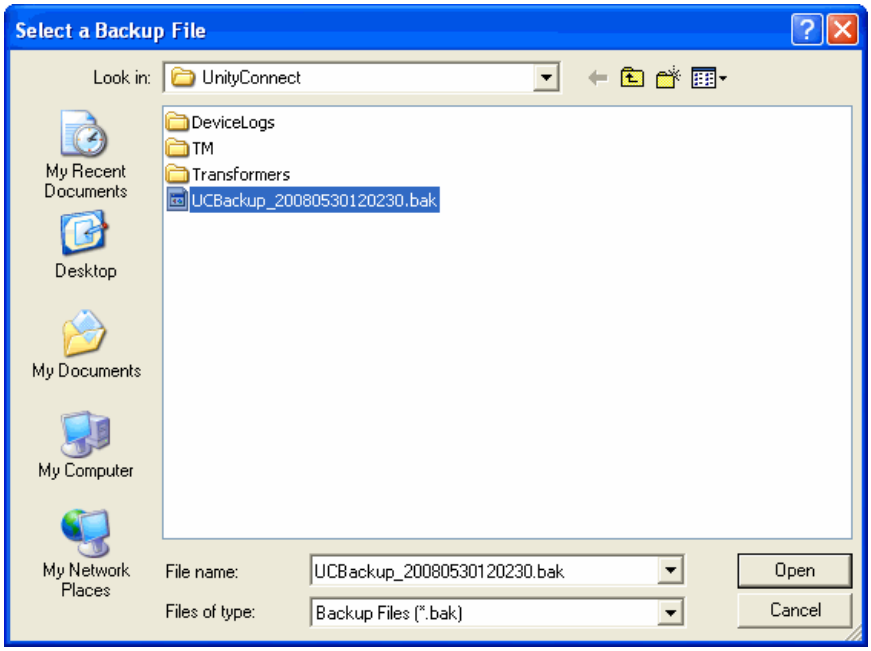


2 The **Restore Settings from Backup** dialog box appears.



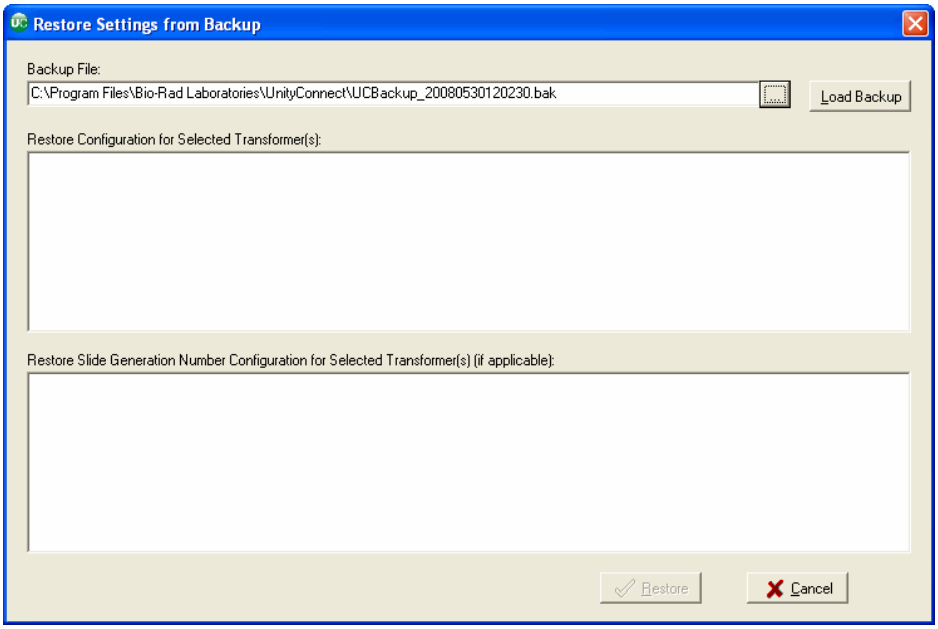
3 Click (ellipsis button).

4 Select the backup file to restore.



5 Click Open .

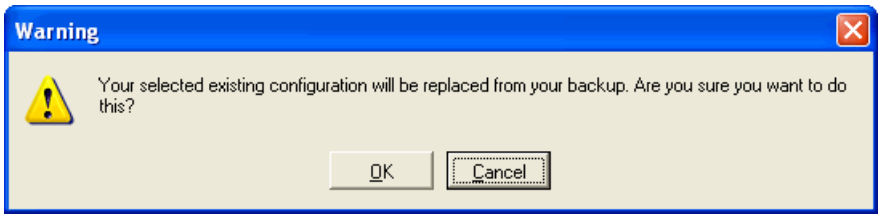
The **Restore Settings from Backup** dialog box appears.



6 Click Load Backup .

7 Click Restore.

The following message appears asking for confirmation.



8 Click OK.

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In This Chapter

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Index

A

B

C

D

E

H

I

L

M

O

Q

R

S

T

U

V

W