



Advantage GlobalTrace User Guide

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Introduction to GlobalTrace

Advantage GlobalTrace (GT) enables clinical sites to manage and track specimens and artifacts in real time. It integrates seamlessly with the Advantage eClinical platform, allowing you to efficiently add, update, and ship specimens across multiple locations.

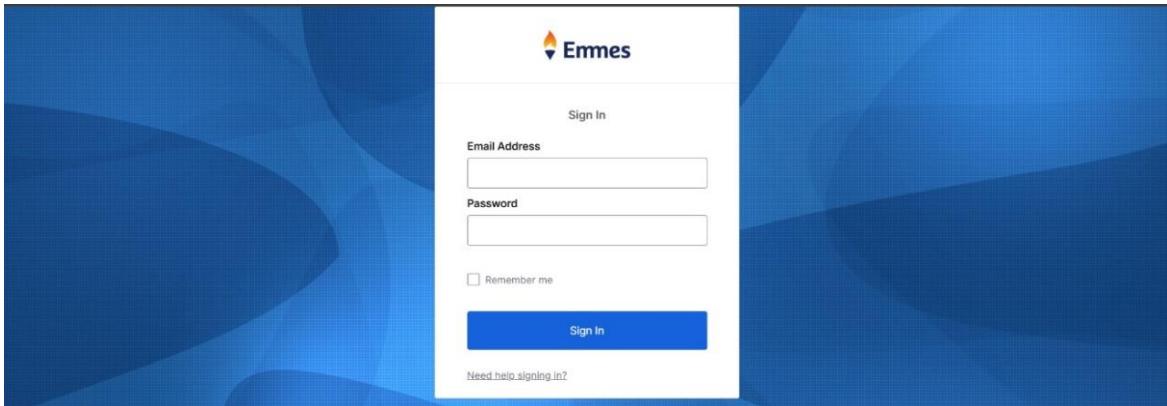


Logging in to GlobalTrace

Use your Advantage eClinical credentials to log in to GlobalTrace and access study data.

Steps to log in:

1. Open your browser and go to emmes.advantage-eclinical.com. The login page appears.



2. Enter your credentials and select **Sign In**. The Advantage eClinical (AEC) dashboard appears.

3. From the AEC Dashboard, select your environment, study, and role, then select **LAUNCH** from the GlobalTrace tile. GlobalTrace opens in a new tab with the study, role, and site populated.



Navigating the Interface

The GlobalTrace interface provides a user-friendly design to simplify study data collection tasks. This section guides you through the main navigation tools, including profile settings, filters, and switching between studies or environments.

Top menu bar

The top menu bar gives you quick access to essential navigation elements, including your username, environment, study, and role. Use these options to switch between studies or roles as needed.

Editing your profile

You can update your display name or password from your profile settings to ensure your account information remains up to date.

Steps to edit your profile:

1. Click the **person icon** in the top right corner. Your Okta account opens in a new tab.

The screenshot shows the GlobalTrace eClinical interface. At the top, there's a navigation bar with the 'Advantage eClinical' logo, 'User Guide Demo', 'Demo Site - SITE1', and a person icon. Below the navigation is a sidebar with links like 'Specimens & Artifacts', 'Inventory', 'Inventory Report', 'Disposition Report', 'Offsite Items', 'Expectations', 'Shipments', 'Create Shipment', 'Active Shipments' (which is selected), 'Accepted Shipments', and 'Shipment Report'. The main content area is titled 'Active Shipments' and displays a grid of shipment status counts: IN PREP (3), INCOMING (1), OUTGOING (3), NEEDS CORRECTION (2), and REJECTED (2). Below this are detailed tables for each category, showing shipment numbers, dates created, and destinations. A bottom footer indicates 'Rows per page: 100' and '1-3 of 3'.

2. Select **Edit Profile** to update your name or password, then select **Save**.

The screenshot shows the Okta account settings page. On the left, there's a sidebar with 'My Apps', 'Work', 'Add section', 'Notifications', and a message about last sign-in. The main area has tabs for 'Personal Information', 'Change Password', 'Forgotten Password Question', and 'Extra Verification'. Under 'Personal Information', fields include 'First name' (Demo), 'Last name' (User), 'Okta username', 'Primary email', and 'Mobile phone'. Under 'Change Password', there are requirements for a password: at least 8 characters, one lowercase letter, one uppercase letter, one number, and no parts of your username. It also lists rules for not including first and last names and for password history. The 'Extra Verification' section notes it increases account security.

Overflow menu

The overflow menu (three dots) in the top right corner lets you switch environments, applications, or roles, and log out of the system.

Steps to switch environments, applications, or role:

1. Select **Environment** or **Application** from the drop-down options in the overflow menu.
2. Choose the desired option from the drop-down list. The system refreshes with the selected option applied.

NOTE: If you select an application that you do not have access to, you will be redirected to OKTA for authentication.

The screenshot shows the Advantage eClinical software interface. At the top, there is a navigation bar with the logo 'Advantage eClinical', 'User Guide Demo' dropdown, 'Demo Clinical Site - ...' dropdown, and a user profile 'Demo User Clinical Site'. In the top right corner, there is an overflow menu represented by three dots. A red box highlights this menu. To its right, a secondary menu is open with options: 'Environment', 'Application', 'Role', and 'Log out'. The main content area displays 'Active Shipments' with various status counts: IN PREP (0), INCOMING (0), OUTGOING (0), NEEDS CORRECTION (1), and REJECTED (1). Below this, there is a table header with columns for 'Shipment Number', 'Date Created', and 'Destination'. A message 'No rows' is displayed at the bottom of the table. On the left side, there is a sidebar with links: Specimens & Artifacts, Inventory, Inventory Report, Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments (which is currently selected and highlighted in blue), Accepted Shipments, and Shipment Report.

Steps to logout:

1. Select the **overflow menu** (three dots) in the top right corner.
2. Select **Log out**.

Accessing a study

Switch between studies as needed using the 'Study' dropdown in the top bar.

The screenshot shows the Advantage eClinical software interface. At the top, there is a navigation bar with the 'Advantage eClinical' logo, a 'User Guide Demo' dropdown, a 'Demo Site 2' dropdown, and a user profile for 'Demo User Clinical Site'. Below the navigation bar is a sidebar titled 'Specimens & Artifacts' containing links for 'Inventory Report', 'Disposition Report', 'Offsite Items', 'Expectations', 'Shipments', 'Create Shipment', 'Active Shipments', 'Accepted Shipments', and 'Shipment Report'. The main content area is titled 'Inventory' and has tabs for 'SPECIMENS' and 'QUARANTINE REPORTS'. The 'SPECIMENS' tab is active, showing a table with three rows of specimen data. The columns include 'Specimen ID', 'Specimen T...', 'Status', 'Purpose', 'Participant', 'Visit', 'Future Use', 'Collection D...', 'Arrival Date', and 'Original Vol...'. The first row shows '400400400' as EBUS-TBNA, 'Available' status, 'For Future Research' purpose, 'SITE2-SITE2001' participant, 'Day 1' visit, and 'Permitted for Future Use' future use. The second row shows '400400401' as WES, 'Not Available' status, 'For Future Research' purpose, 'SITE2-SITE2001' participant, 'No Visit Associated' visit, and 'Permitted for Future Use' future use. The third row shows '400400402' as WES, 'Available' status, 'For Future Research' purpose, 'SITE2-SITE2001' participant, 'No Visit Associated' visit, and 'Permitted for Future Use' future use. At the bottom of the table, there are buttons for 'ROWS PER PAGE' (set to 100), '1-3 OF 3', and navigation arrows. The footer of the page includes 'Version 2025-R1+875' and '© 2025 The Emes Company'.



Managing Site Inventory

Each site manages its own inventory within GlobalTrace. The **Inventory** page allows you to view, filter, and update specimens and artifacts. You can manage individual or batch updates directly from this interface.

Using inventory table tools

The Inventory table provides dynamic tools to manage and interact with specimens or artifacts.

Customizing columns

You can modify the display of columns to focus on relevant data.

Steps to customize columns:

1. Select **COLUMNS** above the table or select the **three-dot** menu in any column header.
2. If you select the three dots, choose from the following options:
 - Sort: Arrange data in ascending or descending order.
 - Pin to left/right: Fix important columns on either side of the table.
 - Filter: Apply filters to refine displayed data.
 - Aggregation: Summarize data within the column.
 - Group by Specimen ID: Organize data based on a Specimen ID.
 - Hide column: Remove a column from view.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes the logo, 'User Guide Demo', 'Demo Site 2', and user information ('Demo User Clinical Site'). The main menu on the left lists 'Specimens & Artifacts' and 'Inventory'. The 'Inventory' tab is selected. The central area displays a table of specimens with columns for Specimen ID, Status, Purpose, Participant, Visit, Future Use, Collection Date, Arrival Date, and Original Vol. A red box highlights the 'COLUMNS' dropdown menu in the top right corner of the table header. This menu contains options like 'Sort by DESC', 'Unsort', 'Pin to left', 'Pin to right', 'Filter', 'Aggregation', 'Group by Specimen ID', and 'Hide column'. The table body shows three rows of specimen data. At the bottom right of the table, there are pagination controls for 'Rows per page: 100' and '1-3 of 3'.

3. If you select **MANAGE COLUMNS**, the Manage Columns panel appears. Use this panel to show or hide columns as needed. Select **SHOW ALL** to make all columns visible or **HIDE ALL** to hide them.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes the logo, 'User Guide Demo', 'Demo Site 2', and user information ('Demo User Clinical Site'). The left sidebar lists 'Specimens & Artifacts' and 'Inventory' (selected). The main content area shows a table with columns: Specimen ID, Specimen ..., Status, Purpose, Participant, Visit, Future Use, Collection..., Arrival Date, Original V...'. A red box highlights the 'FILTERS' button. A dropdown menu for 'Find column' is open, listing various attributes: Checkbox selection, Specimen ID, Specimen Type, Status, Purpose, Participant, Visit, Future Use, Collection Date, Arrival Date, and Original Volume. Buttons at the bottom of the table include 'HIDE ALL' and 'SHOW ALL'.

Filtering data

Apply filters to refine the displayed results.

Steps to filter data:

1. Select **FILTERS** in the Inventory table.
2. Apply filters based on key fields such as:
 - Specimen ID
 - Status
 - Participant
 - Other available attributes
3. Review the filtered results to ensure accurate data retrieval.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes the logo, 'User Guide Demo', 'Demo Site 2', and user information ('Demo User Clinical Site'). The left sidebar lists 'Specimens & Artifacts' and 'Inventory' (selected). The main content area shows tabs for 'Inventory', 'SPECIMENS' (selected), and 'QUARANTINE REPORTS'. A red box highlights the 'FILTERS' button. The table displays specimen details: Specimen ID, Specimen ..., Status, Purpose, Participant, Visit, Future Use, Collection..., Arrival Date, Original V...'. The table shows two rows of data: one for Cryogenic Vials and another for Bone Marrow Aspirate. Buttons at the bottom of the table include 'HIDE ALL' and 'SHOW ALL'.

NOTE: Data becomes visible only after selecting a **Study** and **Site** from the top header. These selections persist across pages and help control what records appear throughout the system.

Performing actions

The **ACTIONS** menu enables bulk operations for managing specimens.

Steps to perform actions:

1. Select one or more specimens from the inventory.
- NOTE:** If you select all specimens, then apply a filter, and select an action, the action will apply only to the original selection (all specimens), **not** to the filtered results.
2. Select **ACTIONS** and choose an operation:
 - a. Updating inventory records to make quick bulk modifications.
 - b. Add to New Shipment
 - c. Add to Existing Shipment
 - d. Add to New Quarantine Report (if report is configured for study)
 - e. Add to Existing Quarantine Report (if report is configured for study)
 3. Complete the required fields in the selected action dialog.
 4. Select **SAVE** to apply changes.

Adding specimens and artifacts

Add specimens or artifacts to your site's inventory to ensure they are ready for processing, shipping, or further action.

NOTE: The same steps outlined below also apply to artifacts when available.

Steps to add specimen or artifacts:

1. In GlobalTrace, select **Inventory** within the 'Specimens & Artifacts' section of the side navigation bar. The **Inventory** page appears. Use the tabs at the top of the inventory page to select the inventory items you would like to view.

The screenshot shows the GlobalTrace interface with the 'Advantage eClinical' logo at the top left. The top navigation bar includes 'User Guide Demo', 'Demo Site 2', and a user profile for 'Demo User Clinical Site'. On the left, a sidebar under 'Specimens & Artifacts' has 'Inventory' selected, which is highlighted in dark blue. Other options in the sidebar include 'Inventory Report', 'Disposition Report', 'Offsite Items', 'Expectations', 'Shipments', 'Create Shipment', 'Active Shipments', 'Accepted Shipments', and 'Shipment Report'. The main content area is titled 'Inventory' and has tabs for 'SPECIMENS' (which is selected) and 'QUARANTINE REPORTS'. Below these tabs is a search bar with placeholder text 'Search...'. A table lists four specimens with columns: Specimen ID, Specimen T..., Status, Purpose, Participant, Visit, Future Use, Collection D..., Arrival Date, and Original Vol...'. The first specimen is '400400400' (EBUS-TBNA, Available, For Future Research, SITE2-SITE2001, Day 1). The second is '400400401' (WES, Not Available, For Future Research, SITE2-SITE2001, No Visit Associated, Permitted for Future Use). The third is '400400402' (WES, Available, For Future Research, SITE2-SITE2001, No Visit Associated, Permitted for Future Use). At the bottom right of the table are buttons for 'ROWS PER PAGE: 100', '1-3 of 3', and navigation arrows. The footer of the page displays 'Version 2025-R1+875' and '© 2025 The Emmes Company'.

2. Select **+ NEW**. The **Add Specimens** page appears.

The screenshot shows the 'Add Specimens' page. The top navigation bar is identical to the previous screenshot. The left sidebar is the same. The main content area is titled '← Dashboard > Add Specimens'. It contains two numbered input fields: '1 Enter Specimen ID(s)' with a placeholder 'Scan or Type Specimen IDs' and '2 Enter Properties' with a placeholder 'Import from file'. Below these fields is a large empty rectangular input area. At the bottom right of this area is a 'NEXT' button. The footer of the page shows 'Version 2025-R1+875' and '© 2025 The Emmes Company'.

3. Type the barcode and press **Enter**, or scan the barcode to enter the specimen or artifact ID. Alternatively, select **IMPORT FROM FILE** to upload an Excel file containing identifiers.

4. Select **NEXT**.

The screenshot shows the 'Add Specimens' page. On the left, there's a sidebar with various links: Specimens & Artifacts, Inventory, Inventory Report, Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments, Accepted Shipments, and Shipment Report. The main area has a header '← Dashboard > Add Specimens'. Below it, there's an input field labeled 'Enter Specimen ID(s)' containing '400400403', a button 'IMPORT FROM FILE', and a 'NEXT' button.

5. Select a 'Specimen Type' from the dropdown list. After you select a specimen type, additional fields appear:

- Participant: Select the participant associated with the specimen.
- Specimen Purpose: Choose the purpose for which the specimen will be used.
- Visit

NOTE:

- If a drop-down has only one option, it is auto-selected for you.
- If a specimen is only collected at specific visits, you'll see only those visits in the drop-down. If it's assigned to certain cohorts, you'll only see participants from those cohorts. This helps you avoid selecting invalid visits or participants for a specimen type. The same rules apply to artifacts.

The screenshot shows the 'Add Specimens' page again. The 'Specimen ID: 400400403' is displayed above the dropdown. The dropdown menu is open, showing 'Specimen Type *' with several options listed. At the bottom right of the main panel, there are 'BACK' and 'SAVE' buttons.

6. After you select a 'Participant', the **Visit** field appears. Select the appropriate 'Visit' for the specimen.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

← Dashboard > Add Specimens

Enter Specimen ID(s)

Specimen ID: 400400403

Specimen Type * Bone Marrow Aspir...

Participant * SITE2-SITE2001

Specimen Purpose * For Biometric Testing

Visit * Day 1

Enter Properties

BACK

SAVE

7. Confirm the 'Specimen Purpose' if not already pre-filled.
8. Review the entered details and select **SAVE** to finalize the specimen entry. A success message appears.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

← Dashboard > Add Specimens

Specimens Added Successfully

Specimen IDs: 400400403

ADD SAVED SPECIMEN(S) TO NEW SHIPMENT ADD SAVED SPECIMEN(S) TO AN EXISTING SHIPMENT DONE

Save Successful
Specimen saved successfully

9. Choose the next action:
 - Select [ADD SAVED SPECIMEN\(S\) TO NEW SHIPMENT](#) to initiate a new shipment for the specimen.
 - Select [ADD SAVED SPECIMEN\(S\) TO AN EXISTING SHIPMENT](#) to include it in an ongoing shipment.
 - Select **DONE** to return to the inventory.

Adding saved specimens to a new shipment

You can add the specimens you saved to a new shipment.

Steps to add the saved specimens to a new shipment:

1. Select **ADD SAVED SPECIMEN(S) TO NEW SHIPMENT** from the 'Specimens Added Successfully' confirmation message. The **Create Shipment** page appears.

NOTE: The **Record Type** field shows **SPECIMEN** for specimen shipments and the **Specimen IDs** field shows the ID of the specimen that was created in the earlier steps.

2. In the 'Add Specimens' section, select the specimens you want to add to a new shipment
3. After all the specimens are added to the shipment, select **START SHIPMENT**. The 'Quality Scan' section appears.
4. Optionally, to remove a specimen from the shipment, you can:
 - Click the **X** icon next to the specimen ID pill, or
 - Select the specimen(s) in the list and then select **REMOVE**.

The **REMOVE** button shows the number of specimens selected for removal.

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400400402	SITE2-SITE2001	WES	For Future Research	Permitted for Future Use	

5. The quality scan is optional. To perform a quality scan, see [Performing a quality scan](#).

To skip this step, select **SKIP QC SCAN**. The ‘Shipment Details’ section of the **Create Shipment** page appears.

- Select the destination, type of carrier, enter the tracking number, add your comments about the shipment, and then select **CREATE SHIPMENT**. The ‘Send Shipment’ section of the **Create Shipment** page appears.

- Optionally, select **PRINT MANIFEST** to generate a shipment manifest to confirm which protected fields should be included in the manifest. See [Printing a shipment manifest](#).
- Select **By checking this checkbox I am confirming that the shipment and specimen information is accurate**, and then:
 - To complete and send the shipment, select **SEND SHIPMENT**. The **Active Shipment** page appears.
 - To save the shipment as in progress, select **DONE**. This keeps the shipment in a draft state, allowing you to return and send it later—especially if external steps are required before finalization.

NOTE: Users often select **DONE** when they need to perform additional tasks outside GlobalTrace before completing the shipment.

- To continue working on a draft shipment, in the **Active Shipments** page, locate your shipment number and select the relevant row. The shipment continues at the last step completed.

The screenshot shows the 'Active Shipments' page. At the top, there are four summary boxes: 'IN PREP' (2), 'INCOMING' (1), 'OUTGOING' (0), 'NEEDS CORRECTION' (0), and 'REJECTED' (0). Below these are buttons for 'COLUMNS', 'FILTERS', and a search bar. The main table lists two active shipments:

Shipment Number	Date Created	Destination
62303288	10Mar2025	
60432805	07Mar2025	

At the bottom right, there are buttons for 'Rows per page' (100), '1-2 of 2', and navigation arrows.

The screenshot shows the 'Send Shipment' page. At the top, there are four buttons: 'Add Specimens', 'Quality Scan', 'Shipment Details', and 'Send Shipment'. The 'Shipment Details' section shows: Shipment Number: 82485128, Destination: Demo Clinical Site, Carrier: World Courier, and Tracking Number: 12345. There is also a 'Comments' field. Below this is a table of specimen details:

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400400567	SITE1-SITE1001	Day 1	EBUS-TBNA	For Future Research	
400400593	SITE3-SITE3001	Day 14	Tissue	For Future Research	

At the bottom left, there is a date input field showing '21 May 2025'. Below it is a checkbox: 'By checking this checkbox I am confirming that the shipment and specimen information is accurate'. At the bottom right are buttons for 'PRINT MANIFEST', 'BACK', 'DONE', and 'SEND SHIPMENT'.

- Select **PRINT MANIFEST** to generate a shipment manifest to confirm which protected fields should be included in the manifest. See [Generating the shipment manifest](#).

Adding saved specimens to an existing shipment

You can add the specimens you saved to an existing shipment.

Steps to add the saved specimens to an existing shipment:

1. Select **ADD SAVED SPECIMEN(S) TO EXISTING SHIPMENT** from the 'Specimens Added Successfully' confirmation message. The **Add to Existing Shipment** page appears.

Shipment Number	Date Created	Destination
62303288	2025-03-10	
60432805	2025-03-07	

2. Select the applicable shipment number row. The **Create Shipment** page appears.

NOTE:

- Only shipments applicable to the specimen type and available shipping routes will appear.
- Specimens already added to the shipment will be listed here and can be removed at this stage if needed.
- The **Specimen IDs** field displays the IDs added during earlier steps.

3. In the 'Add Specimens' section, select the specimens you want to add to the existing shipment.

Add Specimens

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400400404	SITE2-SITE2001	Day 1	Bone Marrow Aspirate	For Biometric Testing	
400400405	SITE2-SITE2001	Day 1	Bone Marrow Aspirate	For Biometric Testing	

Rows per page: 100 1–2 of 2

CANCEL DONE START SHIPMENT

4. Select **START SHIPMENT**. The **Quality Scan** page appears.

Quality Scan

Before sending the shipment, a quality scan confirms that the physical shipment matches the GlobalTrace shipment. If any discrepancies are found, you will be able to match the GlobalTrace shipment to the scanned specimens.

Specimen IDs	IMPORT FROM FILE
--------------	------------------

Match shipment to scanned specimens

BACK SCAN COMPLETE

5. The quality scan is optional. To perform a quality scan, see [Performing a quality scan](#). To skip this step, select **SKIP QC SCAN**. The 'Shipment Details' section of the **Create Shipment** page appears.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

Shipment Details

Destination*

Carrier*

Tracking Number
[0/200]

Comments
[0/2000]

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400400213	SITE2-SITE2001		Cryogenic Vials	For Future Research	
400400375	SITE2-SITE2001		Cryogenic Vials	For Future Research	

Rows per page: 100 ▾ 1-

BACK CREATE SHIPMENT

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- Select the destination, type of carrier, enter the tracking number, add your comments about the shipment, and then select **CREATE SHIPMENT**. The ‘Send Shipment’ section of the **Create Shipment** page appears.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

Shipment Details

Destination*
Demo Clinical Site

Carrier*
World Courier

Tracking Number
12345
[5/200]

Comments
[0/2000]

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400400567	SITE1-SITE1001	Day 1	EBUS-TBNA	For Future Research	
400400593	SITE3-SITE3001	Day 14	Tissue	For Future Research	

Rows per page: 100 ▾ 1-2 of 2 < >

BACK CREATE SHIPMENT

The screenshot shows the 'Send Shipment' page in the Advantage eClinical software. The left sidebar has 'Create Shipment' selected under 'Shipments'. The main area shows a table of specimens with columns for Specimen ID, Participant, Visit, Specimen Type, Purpose, and Future Use. A date input field shows '21 May 2025'. A checkbox at the bottom left is checked, stating 'By checking this checkbox I am confirming that the shipment and specimen information is accurate'. Buttons for 'BACK', 'DONE', and 'SEND SHIPMENT' are at the bottom.

7. Select **PRINT MANIFEST** to generate a shipment manifest to confirm which protected fields should be included in the manifest. See [Printing a shipment manifest](#).
8. Select **By checking this checkbox I am confirming that the shipment and specimen information is accurate** and then select **SEND SHIPMENT**. A success message appears confirming that your changes are saved.

Viewing and updating existing specimen or artifact properties

Access and update detailed information about existing specimens or artifacts to ensure accurate records in your inventory.

Steps to view and update specimen or artifact properties:

1. Go to the **Inventory** page and select a specimen or artifact to open its details.

The screenshot shows the 'Inventory' page in the Advantage eClinical software. The left sidebar has 'Inventory' selected under 'Specimens & Artifacts'. The main area shows a table of specimens with columns for Specimen ID, Specimen Type, Status, Purpose, Participant, Visit, Future Use, Collection Date, Arrival Date, and Original Vol... A search bar and filter buttons are at the top of the table. A footer at the bottom indicates 'Version 2025-R1+875' and '© 2025 The Emmes Company'.

2. Review the information in the following tabs:
 - **SPECIMEN PROPERTIES:** Shows core details, including specimen type, status, and purpose.
 - **ASSOCIATED SPECIMENS:** Lists related specimens under the same participant.
 - **TRACKING INFORMATION:** Shows shipment history and movement if the item has been shipped
3. Update the details as needed.

NOTE: You can only update specimens with status set to 'Available'. If the status has a reason associated, it will also display under the status field.

If a change reason is required, select an option in the **Change Reason** dialog box, then select **OK**. A triangle icon appears next to the updated field to indicate a reason has been captured.

4. Select **SAVE** to confirm your changes. A success message confirms your change are saved.

Making specimens or artifacts unavailable

If a specimen or artifact is lost, damaged, or consumed, you can mark it as **Not Available** to ensure it cannot be shipped, aliquoted, or pooled.

Steps to making specimens or artifacts unavailable:

1. Go to the **Inventory** page and select the specimen or artifact to update.
2. Change the status to 'Not Available' and provide a reason for the change when prompted. If a change reason is required, select an option in the **Change Reason** dialog box and then select **OK**. A triangle icon appears next to the updated field, showing the reason when selected.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

Update Specimen 400400400

Note: The above specimen is an aliquot.

SPECIMEN PROPERTIES

Specimen ID: 400400400

Status *: Available

Available
Not Available

Specimen Type *: EBUS-TBNA

Purpose *: For Future Research

Visit *: Day 1

ASSOCIATED SPECIMENS

TRACKING INFORMATION

SAVE **HISTORY**

3. If prompted, add a Status Reason.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

Update Specimen 400400213

Note: The above specimen is an aliquot.

Specimen ID: 400400213

Status *: Not Available

Status Reason *

Participant *: SITE2-SITE2001

Specimen Type *: Cryogenic Vials

Purpose *: For Future Research

CHANGE REASON

You have altered Status. Provide the reason for change below.

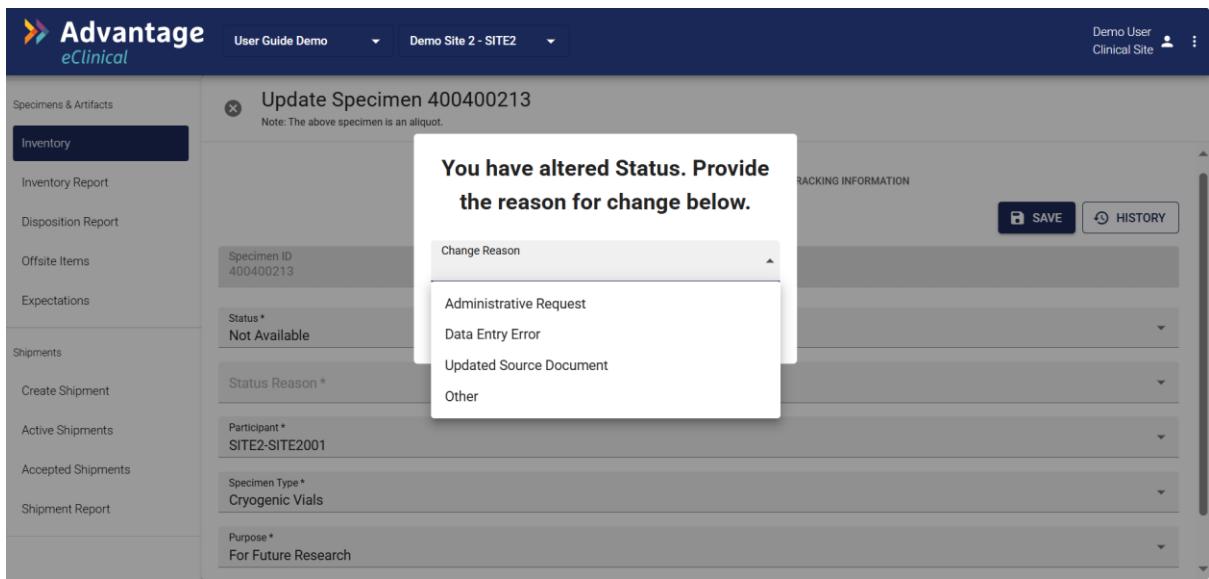
Change Reason

CANCEL **OK**

TRACKING INFORMATION

SAVE **HISTORY**

4. Select the dropdown to choose the appropriate reason and then select **OK** to confirm the reason.



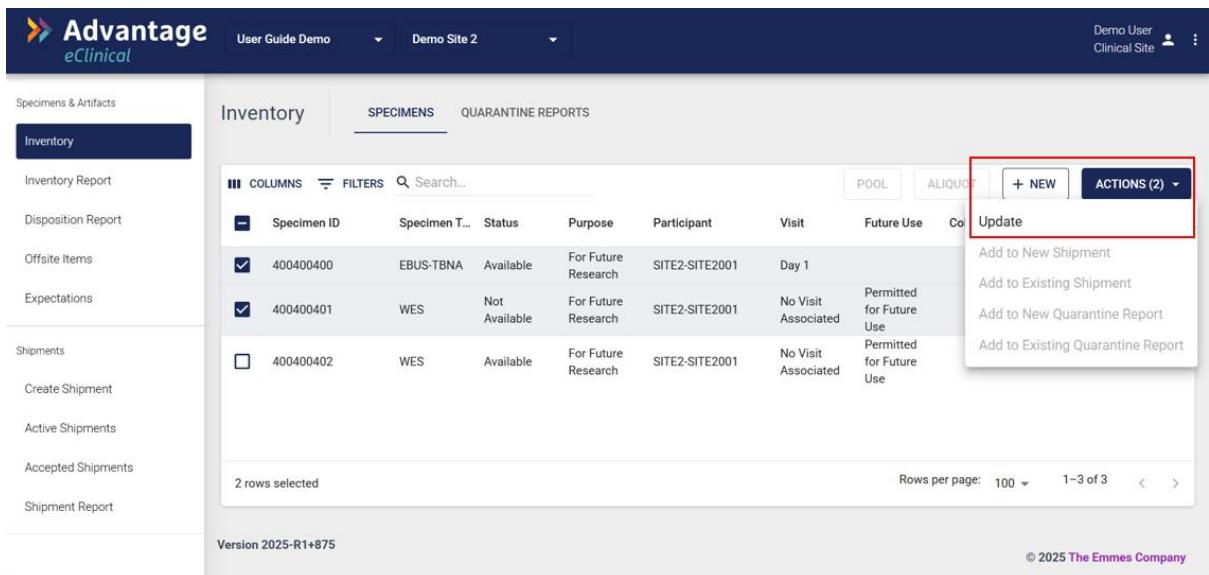
5. Select **SAVE** to confirm the update.

Batch updating specimens

You can update multiple specimens at once using the **Batch Update** feature.

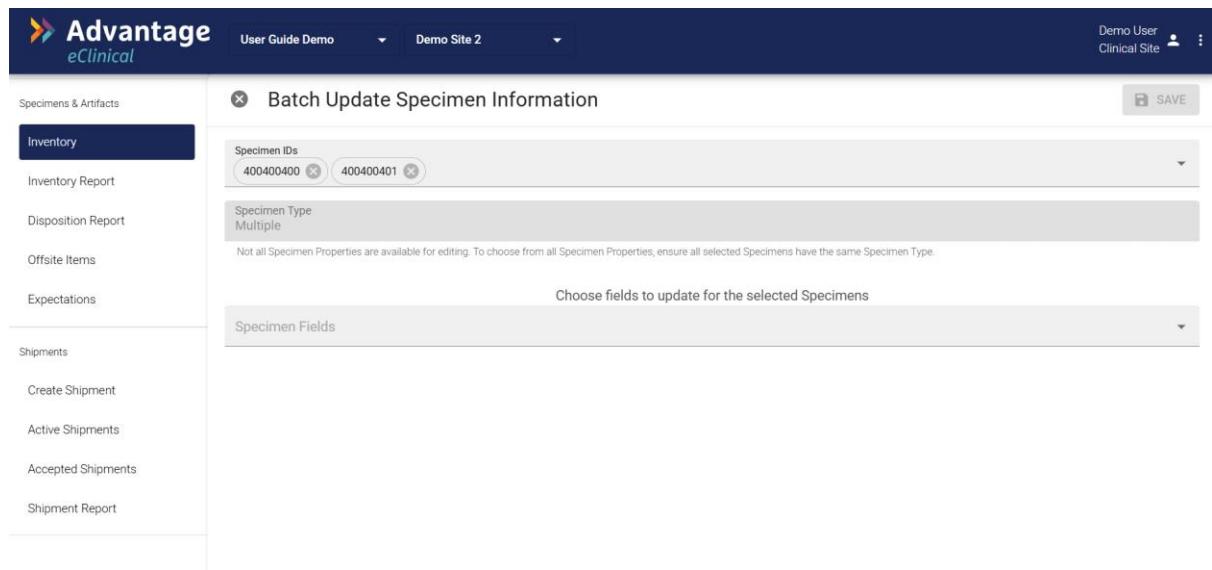
Steps to batch updating specimens:

1. Go to the **Inventory** page and select multiple specimens to update.
2. Select **Actions** and choose **Update**. The button will display a count of the number of specimens being updated.



3. Modify the required fields in the **Batch Update Specimen Information** dialog.

NOTE: Some fields may not be available if specimens of varying types are selected.



4. Select **SAVE** to apply changes to all selected specimens.

Executing actions on specimens and artifacts

The **Actions** menu in the **Inventory** page allows you to perform key operations on selected specimens or artifacts.

The following table details each action on the **Inventory** page, including its description and purpose.

Action	Description
Update	Modify details of the selected specimens or artifacts.
Add to New Shipment	Initiate a new shipment for the selected items.
Add to Existing Shipment	Include items in an active shipment.

NOTE: The 'Aliquot' and 'Pool' options are not applicable for artifacts. The menu dynamically updates based on the selected items and their statuses.

Viewing associated specimens or artifacts

You can view specimens or artifacts linked to the same participant to track associations efficiently.

Steps to view associated specimens or artifacts:

1. Go to the **Inventory** page and select a specimen or artifact to open its details. The **Update Specimen [ID]** page appears.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes 'User Guide Demo' and 'Demo Site 2'. On the right, it shows 'Demo User Clinical Site'. The left sidebar under 'Specimens & Artifacts' has a 'Inventory' section selected. The main content area is titled 'Inventory' and shows a table of 'SPECIMENS' with columns: Specimen ID, Specimen T..., Status, Purpose, Participant, Visit, Future Use, Collection D..., Arrival Date, and Original Vol...'. There are three rows of data, each with a checkbox in the first column. Row 1: Specimen ID 400400400, Specimen Type EBUS-TBNA, Status Available, Purpose For Future Research, Participant SITE2-SITE2001, Visit Day 1, Future Use Permitted for Future Use. Row 2: Specimen ID 400400401, Specimen Type WES, Status Not Available, Purpose For Future Research, Participant SITE2-SITE2001, Visit No Visit Associated, Future Use Permitted for Future Use. Row 3: Specimen ID 400400402, Specimen Type WES, Status Available, Purpose For Future Research, Participant SITE2-SITE2001, Visit No Visit Associated, Future Use Permitted for Future Use. At the bottom, it says 'Version 2025-R1+875' and '© 2025 The Emmes Company'.

The screenshot shows the 'Update Specimen' page for specimen 400400400. The top navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'Update Specimen 400400400' with a note 'Note: The above specimen is an aliquot.' Below this, there are tabs: 'SPECIMEN PROPERTIES' (selected), 'ASSOCIATED SPECIMENS', and 'TRACKING INFORMATION'. On the right are 'SAVE' and 'HISTORY' buttons. The 'SPECIMEN PROPERTIES' section contains fields: Specimen ID (400400400), Status (Available), Participant (SITE2-SITE2001), Specimen Type (EBUS-TBNA), Purpose (For Future Research), and Visit (Day 1).

2. Select **ASSOCIATED SPECIMENS** and review the listed specimens or artifacts associated with the same participant.

The screenshot shows the 'Update Specimen' page for specimen ID 400400401. The left sidebar has a 'Specimens & Artifacts' section with 'Inventory' selected. The main content area has tabs for 'SPECIMEN PROPERTIES', 'ASSOCIATED SPECIMENS' (which is selected), and 'TRACKING INFORMATION'. A note says 'The following specimens are associated with participant SITE2-SITE2001'. A table lists three specimens: 400400402 (Available, WES, For Future Research, Permitted for Future Use), 400400401 (Not Available, WES, For Future Research, Permitted for Future Use), and 400400400 (Available, Day 1, EBUS-TBNA, For Future Research). Navigation controls at the bottom right include 'Rows per page: 25', '1–3 of 3', and arrows.

3. Select any listed item to open its details. From here, you can update any available specimen/artifact or view anything else.

The screenshot shows the 'Update Specimen' page with the 'SPECIMEN PROPERTIES' tab selected. The left sidebar is identical to the previous screenshot. The main content area shows fields for updating specimen details. The 'Specimen ID' field contains '400400401'. Other fields include 'Status * Not Available', 'Status Reason * Used Up', 'Participant * SITE2-SITE2001', 'Specimen Type * WES', 'Purpose * For Future Research', 'Visit *', 'Future Use * Permitted for Future Use', and 'Storage *'. There are 'SAVE' and 'HISTORY' buttons at the top right.

Tracking specimen information

You can track the movement of specimens across shipments to monitor status changes.

Steps to view tracking information:

1. Go to the **Inventory** page and select a specimen or artifact to open its details. The **Update Specimen [ID]** page appears.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes 'User Guide Demo' and 'Demo Site 2'. On the right, it shows 'Demo User Clinical Site'. The left sidebar under 'Specimens & Artifacts' has a 'Inventory' section selected, listing options like 'Inventory Report', 'Disposition Report', 'Offsite Items', 'Expectations', 'Shipments', 'Create Shipment', 'Active Shipments', 'Accepted Shipments', and 'Shipment Report'. The main content area is titled 'Inventory' and has tabs for 'SPECIMENS' (selected), 'QUARANTINE REPORTS', 'POOL', 'ALIQUOT', '+ NEW', and 'ACTIONS'. A search bar and filter options are at the top of the list table. The table lists three specimens: 400400400 (EBUS-TBNA, Available, For Future Research, SITE2-SITE2001, Day 1), 400400401 (WES, Not Available, For Future Research, SITE2-SITE2001, No Visit Associated), and 400400402 (WES, Available, For Future Research, SITE2-SITE2001, No Visit Associated). Permitted for Future Use is noted for both WES specimens. At the bottom, it says 'Rows per page: 100 1-3 of 3'.

The screenshot shows the 'Update Specimen 400400400' page. The top navigation bar is identical to the previous screen. The left sidebar is the same. The main content area has a header 'Update Specimen 400400400' with a note 'Note: The above specimen is an aliquot.' Below this are tabs for 'SPECIMEN PROPERTIES' (selected), 'ASSOCIATED SPECIMENS', and 'TRACKING INFORMATION'. On the right are 'SAVE' and 'HISTORY' buttons. The 'SPECIMEN PROPERTIES' section contains fields: 'Specimen ID' (400400400), 'Status *' (Available), 'Participant *' (SITE2-SITE2001), 'Specimen Type *' (EBUS-TBNA), 'Purpose *' (For Future Research), and 'Visit *' (Day 1).

2. Select **TRACKING INFORMATION** and review shipment details, including:
 - Status (e.g., In Transit, In Prep)
 - Sending Site
 - Destination Site
 - Shipment Number
 - Date

NOTE: If the specimen is not part of a shipment, a message will appear indicating that no tracking information is available.

Status	Sending Site	Destination Site	Shipment Number	Date
Specimen removed	Demo Site		58990712	2025-03-12
In Prep	Demo Site		58990712	2025-03-11
Specimen added	Demo Site		58990712	2025-03-11
Specimen Created	Demo Site			

Rows per page: 25 | 1-4 of 4 | < > |

Completing a Linked CRF

If additional attributes are required for the specimens or artifacts beyond the standard properties, a ‘Linked CRF’ will follow in the ‘Add Specimen or Artifact’ process. The Linked CRF is defined in Study Builder based on the Specimen or Artifact Type, meaning different Linked CRFs may appear depending on the study configuration for the specimen.

Changing existing data in Linked CRFs

When modifying data in a Linked CRF, the system requires a ‘Change Reason’ due to autosaving functionality.

Steps to change data in Linked CRFs:

1. Go to the **Inventory** page and select a specimen or artifact to open its details. The **Update Specimen [ID]** page appears.

Specimen ID	Specimen T...	Status	Purpose	Participant	Visit	Future Use	Collection D...	Arrival Date	Original Vol...
400400501	EBUS-TBNA	In Prep	For Future Research	SITE1-SITE1001	Day 1				
400400502	EBUS-TBNA	Available	For Future Research	SITE1-SITE1001	No Visit Associated				
400400503	WES	Not Available	For Future Research	SITE1-SITE1001	No Visit Associated	Permitted for Future Use			
400400504	WES	Available	For Future Research	SITE1-SITE1001	No Visit Associated	Permitted for Future Use			
400400567	EBUS-TBNA	Available	For Future Research	SITE1-SITE1001	Day 1				
49078	Whole Blood	Available	For Future Research	SITE1-SITE1001	Day 14	Not Applicable	2025-03-14		6 / 7.5 mL
80000	Whole Blood	Available	For Future Research	SITE1-SITE1001	Day 1	Permitted for Future Use	2025-03-12		1 / 7.5 mL
80001	Whole Blood	Available	For Future Research	SITE1-SITE1001	Day 1	Permitted for Future Use	2025-03-12		5.0 / 7.5 mL

2. Select <CRF NAME> and edit the data in the Linked CRF fields.

A dialog box will prompt you to select a 'Change Reason' for each field updated or added.

3. Choose the appropriate reason and select **OK**.
4. The updated or new value will display with an indicator (triangle) beside it. Hover over the **triangle** icon to review the change reason, if needed.

Submitting a Linked CRF

To finalize data entry, you must submit Linked CRFs before clinical data is created.

Steps to submit a Linked CRF:

1. Complete all required fields in the Linked CRF.
2. Select **SUBMIT** at the top or bottom of the form.

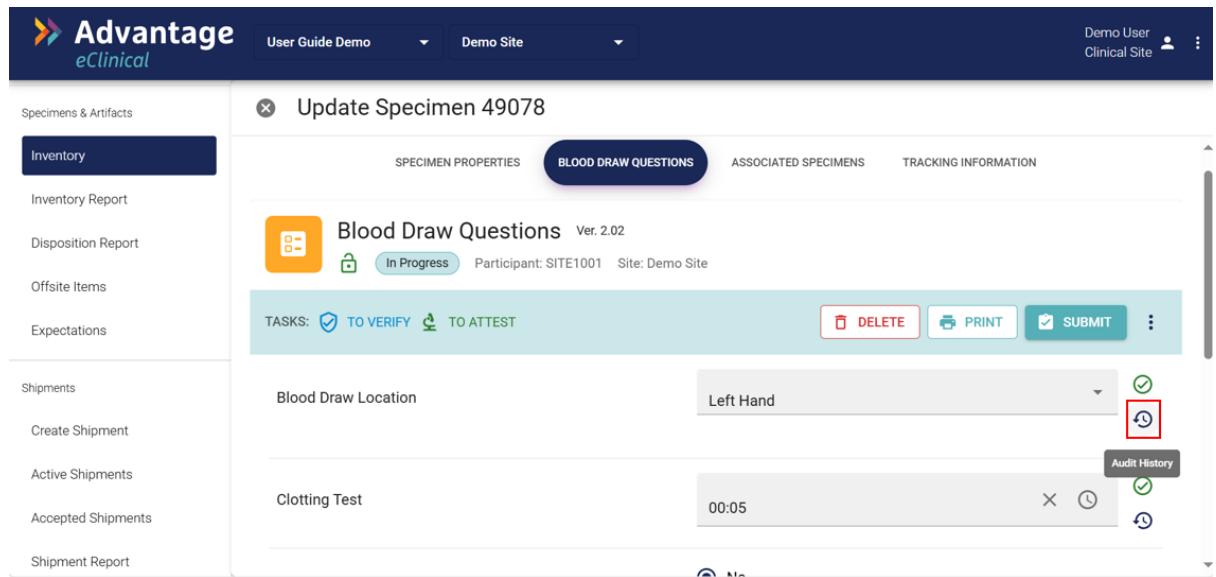
NOTE: After you submit a Linked CRF, you can still modify it, but the changes will not appear in the clinical data until you resubmit the CRF.

Linked CRF question audit history

Each question in a Linked CRF has a detailed audit history.

Steps to view audit history:

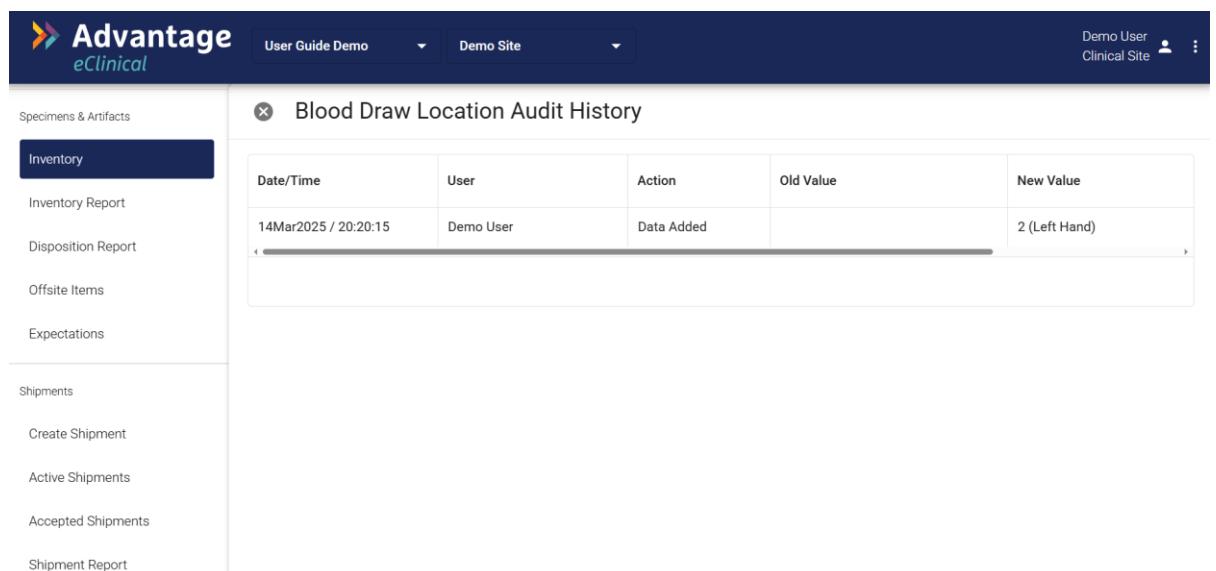
1. Hover over the **Audit History** icon (circular arrow) next to the question and select.



The screenshot shows the Advantage eClinical software interface. On the left, there's a sidebar with 'Specimens & Artifacts' and 'Inventory' selected. The main area is titled 'Update Specimen 49078' and has tabs for 'SPECIMEN PROPERTIES', 'BLOOD DRAW QUESTIONS' (which is active), 'ASSOCIATED SPECIMENS', and 'TRACKING INFORMATION'. Under 'BLOOD DRAW QUESTIONS', there's a 'Blood Draw Questions' section with a status of 'Ver. 2.02 In Progress'. It also shows 'Participant: SITE1001 Site: Demo Site'. Below this, there's a 'TASKS' section with 'TO VERIFY' and 'TO ATTEST' buttons. A 'Clotting Test' field contains the value '00:05'. To the right of this field is a dropdown menu set to 'Left Hand' with an 'Audit History' button. The entire interface has a dark blue header and a light blue footer bar with buttons for 'DELETE', 'PRINT', 'SUBMIT', and more.

2. Review the history, which includes:

- Date or time of changes.
- User who made the changes.
- Action
- Old and new values.
- Change reason, if applicable.



The screenshot shows the 'Blood Draw Location Audit History' screen. The sidebar is identical to the previous screenshot. The main area is titled 'Blood Draw Location Audit History' and displays a table of audit history entries. The table has columns for Date/Time, User, Action, Old Value, and New Value. There is one entry: '14Mar2025 / 20:20:15' under Date/Time, 'Demo User' under User, 'Data Added' under Action, and an empty field under Old Value and a value '2 (Left Hand)' under New Value. The table has a scroll bar on the right.

Date/Time	User	Action	Old Value	New Value
14Mar2025 / 20:20:15	Demo User	Data Added		2 (Left Hand)

Creating quarantine reports

Generate quarantine reports to track specimens flagged for quarantine due to contamination, labeling errors, or storage issues.

Steps to create a new quarantine report:

1. In GlobalTrace, select **Inventory** within the 'Specimens & Artifacts' section of the side navigation bar. The **Inventory** page appears.

Specimen ID	Type	Status	Purpose	Participant	Visit	Future Use	Collection D...	Arrival Date	Original Vol...
400400400	EBUS-TBNA	Available	For Future Research	SITE2-SITE2001	Day 1				
400400401	WES	Not Available	For Future Research	SITE2-SITE2001	No Visit Associated	Permitted for Future Use			
400400402	WES	Available	For Future Research	SITE2-SITE2001	No Visit Associated	Permitted for Future Use			

2. Select **QUARANTINE REPORTS** and then select **+ NEW**. The **Create New Quarantine Report** page appears.

Report Name	Count	Report Type	Quarantine Status	Entry Date	Entry Time	Comment
No rows						

Report Name * Report Type * Specimen Type *

Comment

ADD SPECIMENS

Specimen ID	Participant	Visit Number	Specimen Type	Purpose	Future use
No rows					

CANCEL CREATE QUARANTINE REPORT

3. Add a name for the report, select the report type and specimen type, and then (optionally) add your comments for the report.
4. Enter one or more offspring specimens by scanning or manually inputting specimen IDs in the **Scan or type ID to add** field under 'ADD SPECIMENS'.

Report Name * Report Type * Specimen Type *

Report 1 Deviation Whole Blood

Comment

ADD SPECIMENS

Scan or type ID to add...

80000	
80004	
No rows	

5. Select **CREATE QUARANTINE REPORT**. The report gets added to the reports table.

Create New Quarantine Report

Report Name *	Report 1	Report Type *	Deviation	Specimen Type *	Whole Blood
Comment					
+ ADD SPECIMENS (1)					
Scan or type ID to add...					
Specimen ID	Participant	Visit Number	Specimen Type	Purpose	Future use
80000	SITE1-SITE1001	Day 1	Whole Blood	For Future Research	Permitted for Future Use X

Total Rows: 1

CANCEL **CREATE QUARANTINE REPORT**

Advantage eClinical

Inventory		SPECIMENS	QUARANTINE REPORTS				
Inventory	REPORT NAME	Count	Report Type	Quarantine Status	Entry Date	Entry Time	Comment
Inventory Report	Report 2	1	Deviation	Open	26Mar2025	18:49:27	...
Disposition Report	Report 1	1	Issue Review	Open	26Mar2025	13:38:21	Demo
Offsite Items							...
Expectations							...
Shipments							
Create Shipment							
Active Shipments							
Version 2025-R0.1+883							
© 2025 The Emes Company							

Save Successful Report Report 2 saved successfully

Updating quarantine reports

Update existing quarantine reports and review quarantine statuses to ensure compliance with study protocols and quality control measures.

Steps to update a new quarantine report:

1. Select a report that you want to update. The details of the report appear.

The screenshot shows the Advantage eClinical software interface. At the top, there are navigation links: 'User Guide Demo' and 'Demo Site - SITE1'. On the right, it says 'Demo User Clinical Site'. The main area is titled 'Inventory' and has tabs for 'SPECIMENS' and 'QUARANTINE REPORTS'. Under 'QUARANTINE REPORTS', there is a table with columns: Report Name, Count, Report Type, Quarantine Status, Entry Date, Entry Time, and Comment. One row is visible: 'Report 1' with a count of 1, report type 'Issue Review', quarantine status 'Open', entry date '26Mar2025', entry time '13:38:21', and comment 'Demo'. Below the table, it says 'Rows per page: 100 1–1 of 1'. The left sidebar under 'Specimens & Artifacts' includes 'Inventory' (which is selected), 'Inventory Report', 'Disposition Report', 'Offsite Items', 'Expectations', 'Shipments', 'Create Shipment', 'Active Shipments', and 'Accepted Shipments'. At the bottom right of the main area, it says 'Version 2025-R0.1+883' and '© 2025 The Emmes Company'.

This screenshot shows a modal dialog box titled 'Quarantine Report: Report 2'. It contains fields for 'Report Type *' (set to 'Deviation') and 'Specimen Type *' (set to 'Whole Blood'). There is a large text area for 'Comment'. Below these, there are tabs for 'QUARANTINED SPECIMENS (1)', 'ADD SPECIMENS', and 'AUDIT HISTORY'. The 'QUARANTINED SPECIMENS (1)' tab is active, showing a table with columns: Specimen ID, Participant, Visit Number, Specimen Type, Purpose, and Future use. The table displays the message 'No rows'. At the bottom right of the dialog are 'CANCEL' and 'ADD TO QUARANTINE REPORT' buttons. The background of the main application window is visible, showing the same inventory list as the first screenshot.

2. To (optionally) add comments, enter a comment and select ADD.

Quarantine Report: Report 2

Report Type * Deviation Specimen Type * Whole Blood

Comment Demo ADD

QUARANTINED SPECIMENS (1) + ADD SPECIMENS AUDIT HISTORY

Scan or type ID to add...

Specimen ID	Participant	Visit Number	Specimen Type	Purpose	Future use
No rows					

Shipment Report

This screenshot shows the 'Quarantine Report: Report 2' page. At the top, there are dropdown menus for 'Report Type' (set to 'Deviation') and 'Specimen Type' (set to 'Whole Blood'). Below these is a comment field containing 'Demo'. A teal 'ADD' button is visible. The main area is titled 'QUARANTINED SPECIMENS (1)' with a '+ ADD SPECIMENS' button. A search bar says 'Scan or type ID to add...'. A table below lists specimen details, which currently show 'No rows'. At the bottom, a dark bar contains the text 'Shipment Report'.

3. Add specimens if necessary.

Quarantine Report: Report 2

Report Type * Deviation Specimen Type * Whole Blood

Comment Demo ADD

QUARANTINED SPECIMENS (1) + ADD SPECIMENS AUDIT HISTORY

Scan or type ID to add...

80000
80004

No rows

Shipment Report

This screenshot shows the same 'Quarantine Report: Report 2' page as the previous one, but now it displays two entries in the specimen list. The entries are '80000' and '80004'. The rest of the interface remains the same, including the 'No rows' message at the bottom of the specimen table.

4. In the confirmation menu, select **Confirm Remove Specimen** to delete it or **Do Not Remove** to cancel.

Quarantine Report: Report 2

Report Type *	Deviation	Specimen Type *	Whole Blood		
Comment	Demo				
QUARANTINED SPECIMENS (1)		+ ADD SPECIMENS (2)	AUDIT HISTORY		
Scan or type ID to add...					
Specimen ID	Participant	Visit Number	Specimen Type	Purpose	Future use
80000	SITE1-SITE1001	Day 1	Whole Blood	For Future Research	Permitted for Future Use
80004	SITE1-SITE1001	Day 2	Whole Blood	For Future Research	Permitted for Future Use

X

X

Confirm Remove Specimen

Do Not Remove

- Select **QUARANTINED SPECIMENS (N)** to review the details of the specimen that is quarantined. The (N) is the count/number of specimens in the current report.

Quarantine Report: Report 2

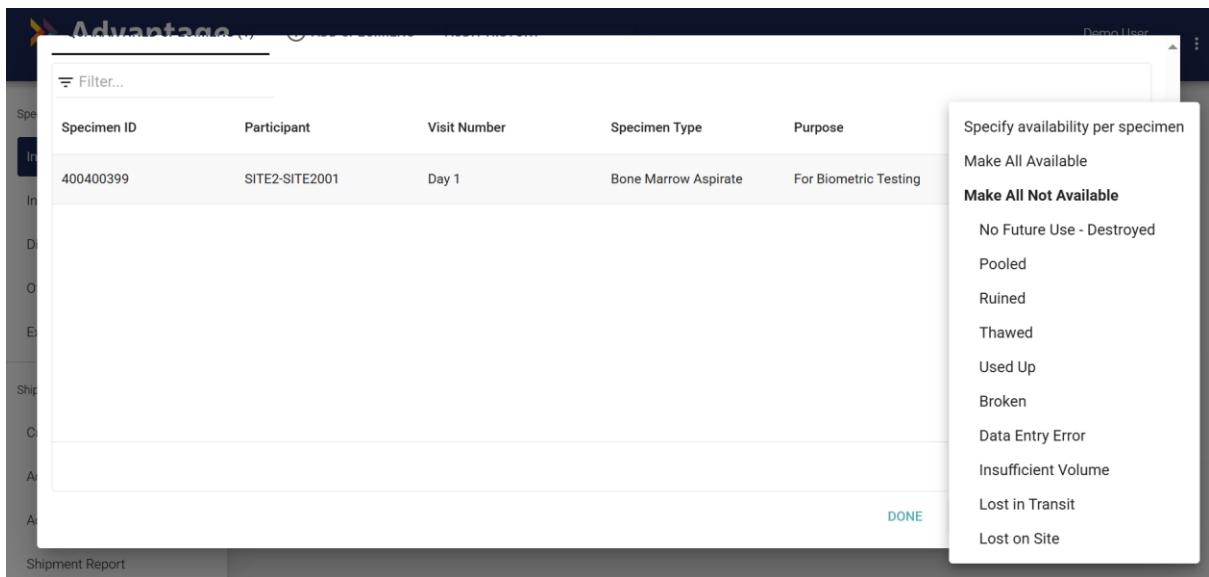
Report Type *	Deviation	Specimen Type *	Whole Blood		
Comment	Demo				
QUARANTINED SPECIMENS (1)		+ ADD SPECIMENS (1)	AUDIT HISTORY		
Filter...					
Specimen ID	Participant	Visit Number	Specimen Type	Purpose	Future use
80000	SITE1-SITE1001	Day 1	Whole Blood	For Future Research	Permitted for Future Use

Total Rows: 1

DONE

MARK REPORT CLOSED

- Select **MARK REPORT CLOSED** to close the report. A new panel opens, prompting you to specify availability for each specimen.



7. Choose the appropriate availability status (e.g., *Pooled*, *Ruined*, *Thawed*, etc.).
You can use **Make All Not Available** or update each specimen individually.
8. Select **DONE** to save your changes and close the report.

NOTE:

- You can mark a report as closed only if you have the 'Close Report' permission.
- Select **AUDIT HISTORY** to view the audit history of an existing report.

Generating specimen reports

You can generate inventory and disposition reports to track specimen status and availability.

Specimen inventory report

The specimen inventory report provides a comprehensive view of all specimens in inventory.

Steps to generate a Specimen Inventory report:

1. Go to **Inventory Report** from the side menu and select **Generate** to request a new report. The request will appear in the 'Previous Downloads' table with a processing status.

The screenshot shows the Advantage eClinical software interface. The left sidebar has a dark blue header with the 'Advantage eClinical' logo. Below the header, the sidebar menu includes: Specimens & Artifacts, Inventory (selected), Inventory Report (highlighted in dark blue), Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments, Accepted Shipments, and Shipment Report. The main content area has a light gray background. At the top right of the content area are 'Refresh' and 'Generate' buttons, with 'Generate' being highlighted by a red box. Below these buttons is a message: 'There are no previous downloads.' In the bottom right corner of the content area, it says 'Version 2025-R0.1+876' and '© 2025 The Emms Company'.

This screenshot shows the same software interface as above, but with a populated 'Previous Downloads' table. The table has three columns: Date/Time, Status, and Action. The single entry in the table is: Date/Time - 2025-03-12 12:20, Status - Pending, and Action - (an orange download icon). A red box highlights the entire table row. At the bottom right of the content area, there are pagination controls: 'Rows per page: 100', '1-1 of 1', and navigation arrows. The rest of the interface is identical to the first screenshot.

Date/Time	Status	Action
2025-03-12 12:20	Pending	(download icon)

2. Select **Refresh** to update the status.
3. When the report is ready, download it by clicking the **Action** icon next to the request.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes 'User Guide Demo', 'Demo Site 2', and a user profile for 'Demo User Clinical Site'. The left sidebar menu has several options: 'Specimens & Artifacts', 'Inventory' (selected), 'Inventory Report' (highlighted in blue), 'Disposition Report', 'Offsite Items', 'Expectations', 'Shipments', 'Create Shipment', 'Active Shipments', 'Accepted Shipments', and 'Shipment Report'. The main content area is titled 'Previous Downloads' with a download icon. It displays a table with columns 'Date/Time', 'Status', and 'Action'. One row is shown: '2025-03-10 16:07' under Date/Time, 'Complete' under Status, and a download icon under Action. Below the table are buttons for 'Refresh' and 'Generate'. At the bottom, it says 'Version 2025-R1+875' and '© 2025 The Emmes Company'.

Specimen disposition report

The specimen disposition report tracks the availability of specimens and the specimen location.

Steps to generate a specimen disposition report:

1. Go to **Disposition Report** from the side menu.

This screenshot is similar to the one above, showing the 'Previous Downloads' page. The 'Disposition Report' option in the sidebar is now highlighted in blue. The main content area shows a message: 'There are no previous downloads.' Below this, it says 'Version 2025-R1+875' and '© 2025 The Emmes Company'.

2. Select **Generate** to request a new report. The request will appear in the 'Previous Downloads' table with a Processing status.

The screenshot shows the Advantage eClinical software interface. The left sidebar includes links for Specimens & Artifacts, Inventory, Inventory Report, Disposition Report (which is selected), Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments (Version 2025-R1+875), and Shipment Report. The main content area is titled 'Previous Downloads' and displays a table with one row. The table columns are Date/Time, Status, and Action. The row shows 2025-03-10 16:16, Pending, and an Action button. Below the table are buttons for Refresh and Generate. A green success message box is overlaid on the page, stating 'Success' and 'Download has been submitted for processing.'

Date/Time	Status	Action
2025-03-10 16:16	Pending	

Rows per page: 100 1–1 of 1

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3. Select **Refresh** to update the status.
4. When the report is ready, download it by clicking the **Action** icon next to the request.

The screenshot shows the Advantage eClinical software interface, similar to the previous one but with two rows in the 'Previous Downloads' table. The first row is complete, and the second row is also complete. The 'Action' column contains download icons, with the second one highlighted by a red box. The rest of the interface is identical to the first screenshot.

Date/Time	Status	Action
2025-03-10 16:16	Complete	
2025-03-10 16:17	Complete	

Rows per page: 100 1–2 of 2

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Aliquoting Specimens

Aliquoting allows you to create offspring specimens from parent specimens while maintaining detailed records in Global Trace. This helps you track specimen usage and availability accurately.

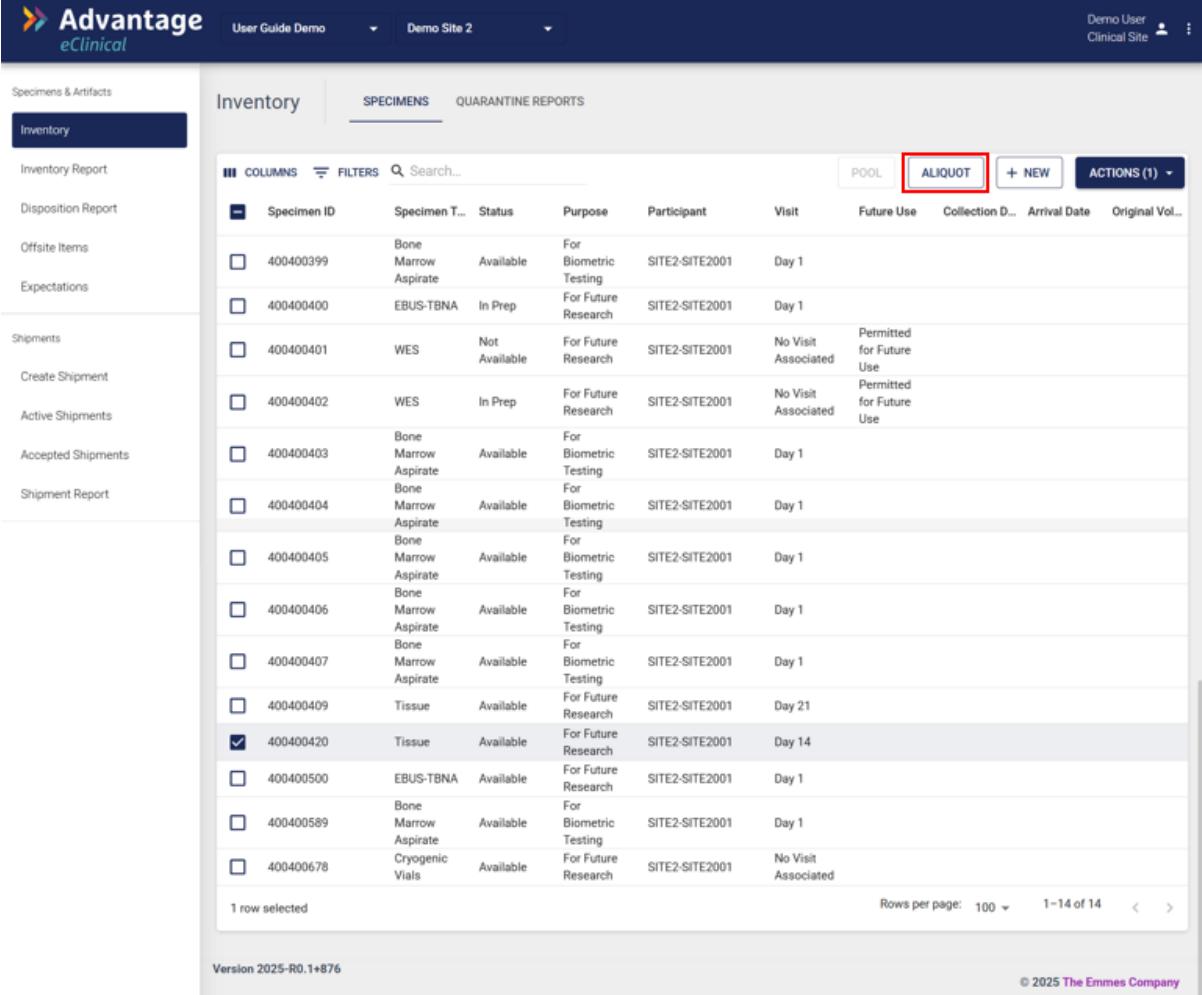
Entering offspring details

You can create one or more offspring specimens from a parent specimen in inventory.

NOTE: If a specimen is already an aliquot, you can further aliquot it. Specimens that are aliquot-only will also be available for aliquoting. Each aliquot can be split further as long as there is residual volume, allowing you to continue the aliquoting process as needed.

Steps to enter offspring details:

1. Go to **Inventory**, select 1 specimen that is available, then select **ALIQUOT**.



The screenshot shows the Advantage eClinical software interface. The top navigation bar includes the logo, "User Guide Demo", "Demo Site 2", and a user profile. The left sidebar has a "Specimens & Artifacts" section with "Inventory" selected, and other options like "Inventory Report", "Disposition Report", "Offsite Items", and "Expectations". The main content area is titled "Inventory" and shows a grid of specimen data. The grid columns are: Specimen ID, Specimen T..., Status, Purpose, Participant, Visit, Future Use, Collection D..., Arrival Date, and Original Vol... . A red box highlights the "ALIQUOT" button in the top right corner of the grid header. The grid contains 14 rows of specimen information, with the 12th row being checked. At the bottom of the grid, it says "1 row selected" and "Rows per page: 100 1-14 of 14". The footer includes "Version 2025-R0.1+876" and "© 2025 The Emmes Company".

2. In the **Aliquot Specimens** page that appears, enter or scan valid Offspring ID(s).

If aliquoting into multiple specimens, choose one of the following:

- Enter properties for each offspring (requires defining attributes separately).
- Apply same properties to all offspring (applies the same attributes to all entries).

The screenshot shows the 'Aliquot Specimens' page in the Advantage eClinical software. The left sidebar contains navigation links for Specimens & Artifacts, Inventory, Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments, Accepted Shipments, and Shipment Report. The main content area has a header 'Aliquot Specimens' with a back arrow. Below it is a section titled 'Aliquot Specimens' with three numbered steps: 1. Aliquot Specimen, 2. Enter Offspring Properties, and 3. Aliquot Info. Step 1 is selected. The 'Parent Specimen' section shows a dropdown menu with 'Select Specimen to Aliquot' and the ID '400400420'. The 'Enter Offspring' section shows two IDs: '400400375' and '400400213'. Below these are two radio button options: 'Enter Properties for each offspring' (unchecked) and 'Apply same properties to all offspring' (checked). A 'NEXT' button is located at the bottom right.

3. Select **NEXT** to proceed to offspring properties.
4. Select the applicable 'Aliquot Specimen Type' and 'Aliquot Specimen Purpose' from the available options and then select **NEXT**.

The screenshot shows the 'Aliquot Specimens' page with the 'Aliquot Specimen' step selected. The 'Offspring IDs' field contains '400400375, 400400213'. The 'Aliquot Specimen Type' dropdown is set to 'Cryogenic Vials' and the 'Aliquot Specimen Purpose' dropdown is set to 'For Future Research'. The 'NEXT' button is visible at the bottom right.

5. Enter the 'Residual Volume in Units', if applicable or turn on **Used Up?** if the parent specimen is fully consumed.

NOTE: You must complete either the residual volume field or select **Used Up?** to proceed. The system will update inventory records, marking the parent specimen as 'Not Available' if fully consumed.

← Aliquot Specimens

Parent Specimen: 400400420 (Tissue)

Residual Volume In Units
5

The residual volume of the aliquoted specimen.

Used Up?

Offspring Specimens

Specimen ID	Total Volume	Specimen Type	Purpose	Future Use	Collection Date Time
400400375		Cryogenic Vials	For Future Research		
400400213		Cryogenic Vials	For Future Research		

Total Rows: 2

BACK **COMPLETE**

- Select **COMPLETE** to finalize the offspring creation. A success message confirms that the offspring specimen has been added successfully.

← Aliquot Specimens

Offspring Added Successfully

Offspring IDs: | 400400213 | 400400375

ADD SAVED SPECIMEN(S) TO NEW SHIPMENT **ADD SAVED SPECIMEN(S) TO AN EXISTING SHIPMENT** **DONE**

400400213 Cryogenic Vials For Future Research

Total Rows: 2

Save Successful Specimen saved successfully

BACK **COMPLETE**

- Choose the next action:
 - Select **ADD SAVED SPECIMEN(S) TO NEW SHIPMENT** to initiate a new shipment for the specimen.
 - Select **ADD SAVED SPECIMEN(S) TO AN EXISTING SHIPMENT** to include it in an ongoing shipment.
 - Select **DONE** to return to the inventory.



Pooling Specimens

Pooling allows you to combine multiple parent specimens into a single or multiple new specimens while maintaining detailed records in GlobalTrace. This helps you accurately track pooled specimens in the inventory.

Steps to pool specimens:

1. Go to **Inventory** and select **POOL**. The **Pool Specimens** page appears.

The screenshot shows the GlobalTrace interface with the 'Inventory' tab selected. On the left, there's a sidebar with various links like 'Inventory Report', 'Disposition Report', etc. The main area has tabs for 'SPECIMENS' and 'QUARANTINE REPORTS'. Below these are buttons for 'COLUMNS', 'FILTERS', 'Search...', 'POOL' (which is highlighted with a red box), 'ALIQUOT', '+ NEW', and 'ACTIONS'. A table lists specimen details such as Specimen ID, Status, Purpose, Participant, Visit, Future Use, Collection..., Arrival Date, and Original V... . One row is selected, showing a specimen with Specimen ID 400400501, Status In Prep, Purpose For Future Research, Participant SITE1-SITE1001, Visit Day 1, and Future Use Permitted for Future Use.

2. Select the parent specimens to pool and then select **NEXT** to proceed to offspring details.

The screenshot shows the 'Pool Specimen' wizard. Step 1: Pool Specimen shows two selected specimens (12345 and 12356) in a dropdown menu. Step 2: Enter Offspring is the next step. Step 3: Enter Properties is the final step. A large orange 'Pool Specimen' button is prominent. A 'NEXT' button is at the bottom of the form.

Entering offspring details

You can enter one or more offspring specimens by scanning or manually inputting specimen IDs.

Steps to enter offspring details:

1. In the **Enter Offspring** page, scan or manually enter the offspring specimen ID.

NOTE: You can enter only valid specimen IDs.

The screenshot shows the 'Pool Specimen' interface. On the left, a sidebar lists various specimen-related options like 'Specimens & Artifacts', 'Inventory', and 'Shipments'. The main area is titled 'Pool Specimen' and contains three numbered steps: 1. Pool Specimen (selected), 2. Enter Offspring (highlighted in orange), and 3. Enter Properties. Step 2, 'Enter Offspring', has a sub-section where two specimen IDs, '12345' and '12356', are listed. Below this, there are two radio button options: 'Enter Properties for each offspring' (unchecked) and 'Apply same properties to all offspring' (checked). At the bottom are 'BACK' and 'NEXT' buttons.

2. If pooling multiple specimens, choose one of the following:
 - **Apply same properties to all offspring** (applies the same attributes to all entries).
 - **Enter properties for each offspring individually** (requires defining attributes separately).
3. Select **NEXT** to proceed to specimen properties.

Setting offspring properties

You must define attributes for each offspring specimen before adding it to inventory.

Steps to set offspring properties:

1. Choose a 'Specimen Type' and 'Purpose' for the offspring specimen.

The screenshot shows the 'Pool Specimen' form in the Advantage eClinical software. The left sidebar has a 'Specimens & Artifacts' section with links for Inventory, Inventory Report, Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments, Accepted Shipments, and Shipment Report. The main form title is 'Enter Specimen Properties'. It includes fields for Offspring Specimen ID(s) (12345, 12356), Specimen Type (Whole Blood), Specimen Purpose (For Future Research), Future Use (Not Known at This Time), Collection Date (2025-03-18), Collection Time (11:12), Volume (4 mL), Storage (Liquid Nitrogen), and Location. At the bottom are 'BACK' and 'NEXT' buttons.

2. If entering multiple offspring specimens:
 - If **Apply same properties to all offspring** is selected, all offspring IDs appear at the top of the page, and the same properties apply to each.
 - If **Enter properties for each offspring individually** is selected, only one offspring ID appears at a time. You must enter attributes separately for each specimen.
3. If needed, enable **Carry over offspring properties** to auto-populate values for subsequent entries.
 - If selected, previously entered attributes are automatically copied to the next specimen but can be modified without affecting earlier entries.
 - This setting remains active unless manually disabled.
4. Select **NEXT** or **SAVE** to confirm offspring properties and proceed to the linked CRF form.

Completing linked CRFs

If additional attributes are required, GlobalTrace displays a linked CRF based on the specimen type. Depending on the study, different Linked CRFs may appear for different specimens in a batch.

Steps to complete a linked CRF:

1. Fill in the required details in the linked CRF form.

2. If modifying existing CRF data, select a 'Change Reason' when prompted.
3. Select **SUBMIT** to save and finalize the CRF entry.
4. To review changes, check the **Linked CRF Audit History**.

To know more, see [Completing a linked CRF](#).

Finalize pooled specimen information

Complete creating the pooled specimens.

Steps to finalize pooled specimen information:

1. Select **SAVE** to finalize the pooled specimen creation. The system updates inventory records, marking parent specimens as 'Not Available' if fully consumed.

Advantage
eClinical

User Guide Demo Demo Site

Demo User Clinical Site

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

Update Specimen 12345

Note: The above specimen is a pooled sample.

SPECIMEN PROPERTIES

BLOOD DRAW QUESTIONS ASSOCIATED SPECIMENS TRACKING INFORMATION

Specimen ID
12345

Status *
Not Available

Status Reason *
Pooled

Participant *
SITE1-SITE1001

Specimen Type *
Whole Blood

Purpose *
For Future Research

Visit *

SAVE **HISTORY**

Specimen ID
12345

Status *
Not Available

Status Reason *
Pooled

Participant *
SITE1-SITE1001

Specimen Type *
Whole Blood

Purpose *
For Future Research

Visit *

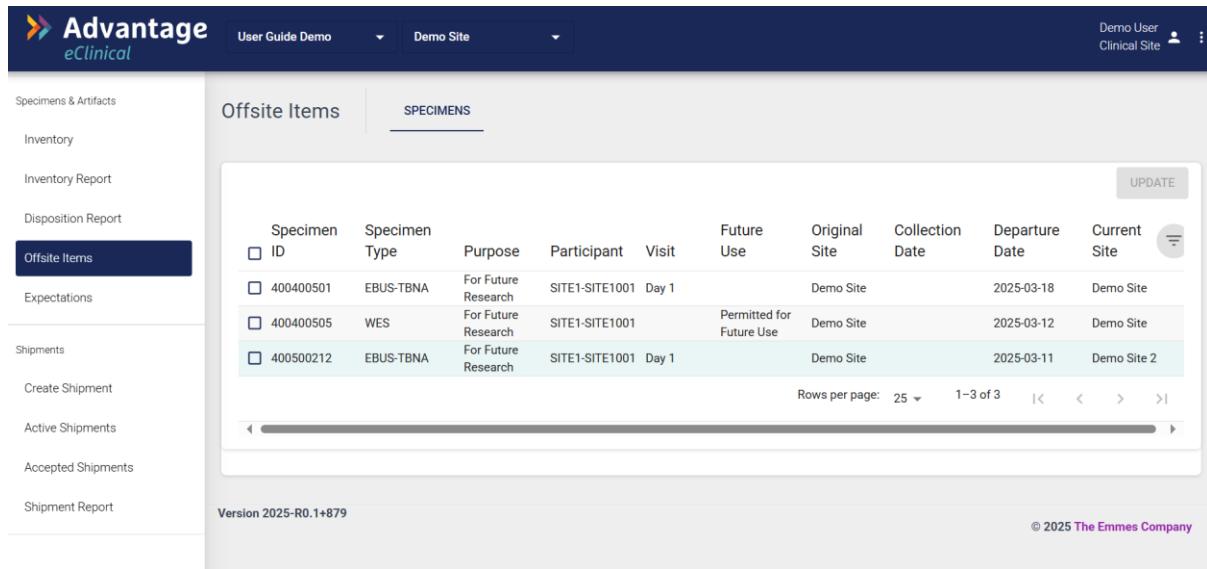
SAVE **HISTORY**

Managing Offsite Items

The **Offsite Items** page provides a centralized view of **Specimens** and **Artifacts** (if configured) that have been transferred to an offsite location. You can navigate between **Specimens** and **Artifacts** using the tabs at the top of the page to monitor and manage offsite inventory efficiently.

Viewing offsite specimens

Offsite specimens are those that have been shipped to and received by another site. The **Offsite Specimens** page allows you to track, view, and update specimen details as needed. Updates should be infrequent since specimens undergo a thorough review before shipment.



The screenshot shows the 'Offsite Items' page in the Advantage eClinical software. The left sidebar has a dark blue background with white text and includes links for 'Specimens & Artifacts', 'Inventory', 'Inventory Report', 'Disposition Report', 'Offsite Items' (which is highlighted in blue), 'Expectations', 'Shipments', 'Create Shipment', 'Active Shipments', 'Accepted Shipments', and 'Shipment Report'. The main content area has a light gray background. At the top, there are two tabs: 'Offsite Items' (selected) and 'SPECIMENS' (underlined). Below these are three rows of specimen data:

Specimen ID	Specimen Type	Purpose	Participant	Visit	Future Use	Original Site	Collection Date	Departure Date	Current Site
400400501	EBUS-TBNA	For Future Research	SITE1-SITE1001	Day 1		Demo Site		2025-03-18	Demo Site
400400505	WES	For Future Research	SITE1-SITE1001		Permitted for Future Use	Demo Site		2025-03-12	Demo Site
400500212	EBUS-TBNA	For Future Research	SITE1-SITE1001	Day 1		Demo Site		2025-03-11	Demo Site 2

At the bottom of the page, there is a footer with the text 'Version 2025-R0.1+879' and '© 2025 The Emmes Company'.

Steps to view an offsite specimen:

1. Go to the **Offsite Items** page. The 'SPECIMENS' section shows the specimens that were previously at your site but have since been shipped offsite.
2. Select a specimen to view its details. By default, the **SPECIMEN PROPERTIES** tab is selected when viewing an offsite specimen.

- Select the **ASSOCIATED SPECIMENS**, **TRACKING INFORMATION**, and linked CRF (if available) tabs for additional details.

Viewing associated specimens

You can view other specimens associated with the same participant.

Steps to view associated specimens:

- Select the **ASSOCIATED SPECIMENS** tab from the 'View/Update Specimen' window. The list displays all specimens linked to the same participant.

The following specimens are associated with participant SITE1-SITE1001							
Specimen ID	Status	Specimen Type	Purpose	Future Use	Collection Date	Arrival Date	Current Site
80001	Available	Whole Blood	For Future Research	Permitted for Future Use	2025-03-12		Demo Site
400400501	In Transit	EBUS-TBNA	For Future Research				Demo Site
400400504	Available	WES	For Future Research	Permitted for Future Use			Demo Site
80000	Available	Whole Blood	For Future Research	Permitted for Future Use	2025-03-12		Demo Site
400400567	Available	EBUS-TBNA	For Future Research				Demo Site
12356	Not Available	Whole Blood	For Future Research	Not Known at This Time			Demo Site
49078	Available	Whole Blood	For Future Research	Not Applicable	2025-03-14		Demo Site
12345	Not Available	Whole Blood	For Future Research	Not Known at This Time			Demo Site
400500212	Available	EBUS-TBNA	For Future Research		2025-03-12		Demo Site 2
400400502	Available	EBUS-TBNA	For Future Research				Demo Site
400400505	In Transit	WES	For Future Research	Permitted for Future Use			Demo Site

- Select a specimen in the list to update the 'View/Update' window to see the specimen details.

Specimen ID: 80004

Participant: SITE1-SITE1001

Specimen Type: Whole Blood

Purpose: For Future Research

Visit: Day 2

Future Use: Permitted for Future Use

Tracking offsite specimens

Steps to view tracking information:

1. Select the **TRACKING INFORMATION** tab from the View/Update Specimen window. The table shows all shipment-related details for the selected specimen.

Status	Sending Site	Destination Site	Shipment Number	Date
Specimen removed	Demo Site		58990712	2025-03-12
In Prep	Demo Site		58990712	2025-03-11
Specimen added	Demo Site		58990712	2025-03-11
Specimen Created	Demo Site			

Linked CRFs for offsite specimens

If a specimen has an associated linked CRF, it appears as a separate tab when viewing the specimen. For details, see [Completing a Linked CRF](#).

Updating offsite specimens

You can modify fields on the **Specimen Properties** page or within **Linked CRFs**, if you have the 'Update off-site' permission. You need to provide a **Change Reason** for all modifications.

Steps to update an offsite specimen:

1. Go to the **SPECIMEN PROPERTIES** tab or linked CRF and edit the necessary fields.

The screenshot shows the 'Update Specimen' dialog for specimen 80004. The 'SPECIMEN PROPERTIES' tab is active. The form contains the following data:

- Specimen ID: 80004
- Participant*: SITE1-SITE1001
- Specimen Type*: Whole Blood
- Purpose*: For Future Research
- Visit*: Day 2
- Future Use: Permitted for Future Use

Buttons at the bottom right include 'SAVE' and 'HISTORY'.

2. The **Change Reason** dialog appears. Select a reason and then select **OK**.

The screenshot shows the 'Update Specimen' dialog with a modal overlay titled 'You have altered Visit. Provide the reason for change below.' The modal contains a dropdown menu labeled 'Change Reason' with the option 'Data Entry Error' selected. Buttons for 'CANCEL' and 'OK' are at the bottom of the modal.

3. Updated fields are marked with a **triangle**. Clicking the **triangle** shows the change reason.

NOTE: When you update an offsite specimen, an automatic email alert is sent to the defined contact list at the specimen's site, detailing the update, if configured

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

Update Specimen 80004

SPECIMEN PROPERTIES

Specimen ID
80004

Participant*
SITE1-SITE1001

Specimen Type*
Whole Blood

Purpose*
For Future Research

Visit*
Screening

Future Use
Permitted for Future Use

Collection Date
2025-03-05

BLOOD DRAW QUESTIONS

ASSOCIATED SPECIMENS

TRACKING INFORMATION

SAVE **HISTORY**

Batch updating offsite specimens

You can update multiple specimens simultaneously. You need to provide a **Change Reason** for all modifications.

Steps to batch update specimens:

1. Select the specimens to update and then select **UPDATE**. The **Specimen ID** field populates with selected specimens.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

SPECIMENS

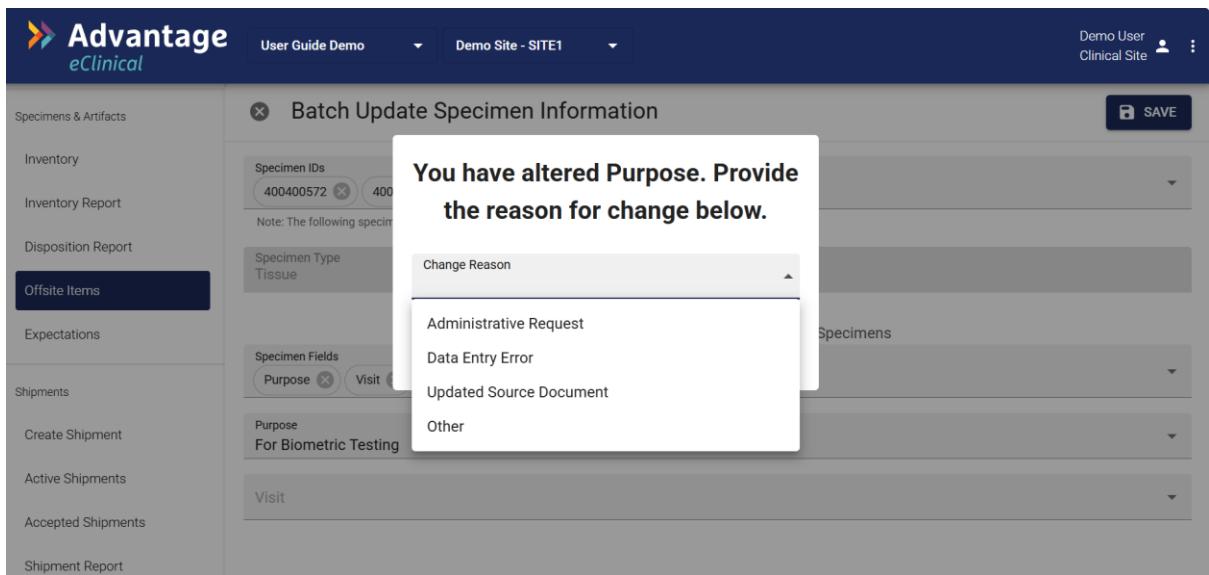
Specimen ID	Specimen Type	Purpose	Participant	Visit	Future Use	Original Site	Collection Date	Departure Date	Current Site	Actions
<input type="checkbox"/> 400400501	EBUS-TBNA	For Future Research	SITE1-SITE1001	Day 1	Demo Site	2025-03-18	Demo Site			
<input checked="" type="checkbox"/> 400400505	WES	For Future Research	SITE1-SITE1001		Permitted for Future Use	Demo Site	2025-03-12	Demo Site		
<input checked="" type="checkbox"/> 400500212	EBUS-TBNA	For Future Research	SITE1-SITE1001	Day 1	Demo Site	2025-03-11	Demo Site 2			

Rows per page: 25 | 1–3 of 3 | < > >>

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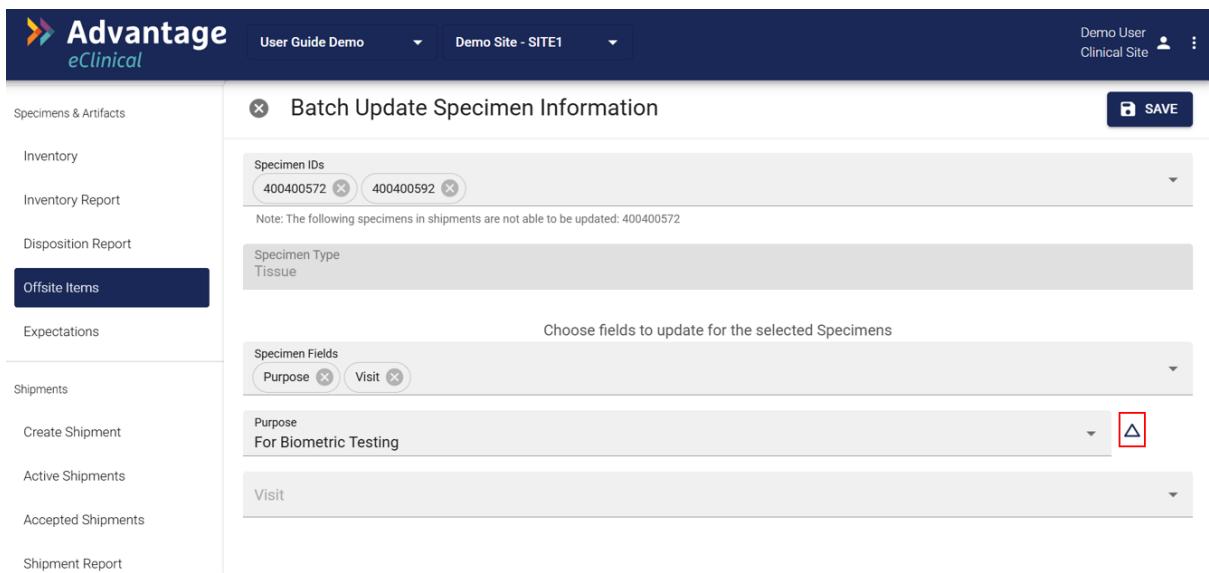
2. The **Specimen Type** field displays the type if all specimens are the same; otherwise, it shows 'Multiple'. If multiple types are selected, only fields common to all selected specimen types will be available for batch updates.
3. Selecting the specimen fields causes them to appear on the **Batch Update Specimen Information** page.
4. Edit the necessary fields. The **Change Reason** dialog appears.

5. Select a reason and then select OK.



6. Updated fields are marked with a **triangle**. Clicking the **triangle** shows the change reason.

NOTE: When you batch update an offsite specimen, an automatic email alert is sent to the defined contact list at the specimen's site, detailing the update, if configured



Viewing offsite artifacts

You can view offsite artifacts (if configured) previously located at the selected site but now shipped offsite.

Steps to view offsite artifacts:

1. Go to the **Offsite Items** page and select **ARTIFACTS**.
2. View details of offsite artifacts.



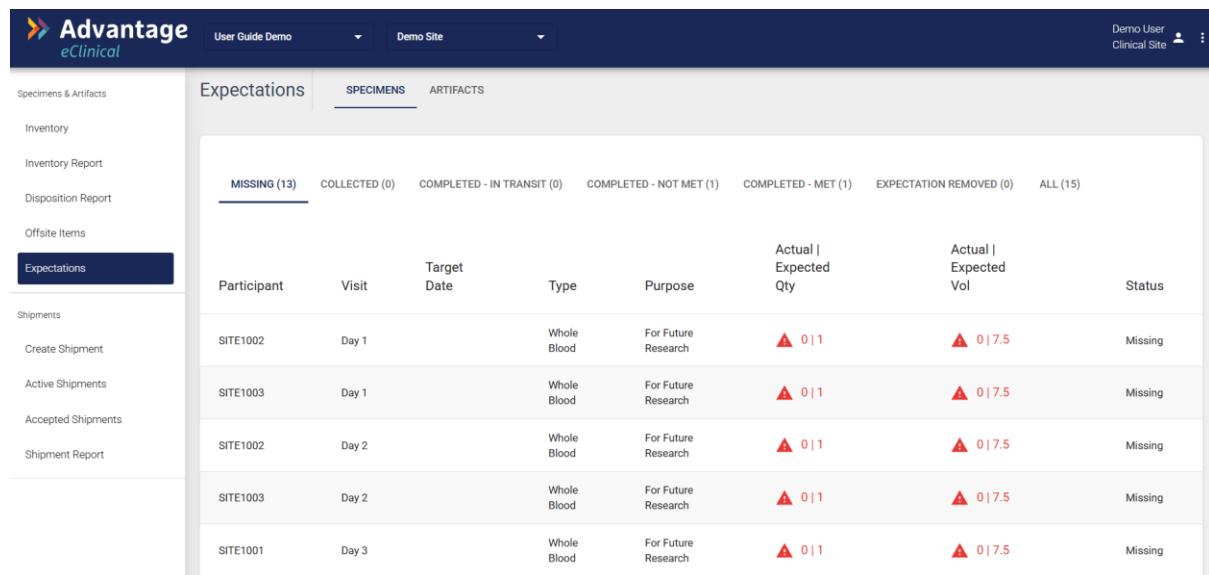
Managing Specimen Expectations

You can view all expected specimens or artifacts and their status in GlobalTrace. This includes both self-collected and site-collected specimens or artifact expectations. The system updates expectation statuses dynamically based on user actions in ePRO.

Viewing specimen expectations

You can access specimen expectations in GlobalTrace under the **Expectations** page. The **Specimens** tab displays all expected specimens along with their status. Specimen statuses include:

- Missing: The specimen is expected but has not been collected.
- Collected: The collection date is recorded in either ePRO or GlobalTrace.
- Completed- In Transit: The drop-off or shipment date has been recorded in ePRO.
- Completed- Not Met: The specimen was collected but did not meet the expected quantity or volume.
- Completed- Met: The collected specimen matched the expected quantity and volume.
- Expectation Removed: The expectation was removed due to an unexpected rule.



Participant	Visit	Target Date	Type	Purpose	Actual Expected Qty	Actual Expected Vol	Status
SITE1002	Day 1		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1003	Day 1		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1002	Day 2		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1003	Day 2		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1001	Day 3		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing

Understanding status updates

GlobalTrace updates expectation statuses automatically based on ePRO actions. Each status reflects the latest activity on a specimen, providing visibility into its collection and shipment process.

- When a specimen task is created in ePRO, it appears as ‘Missing’ in GlobalTrace.
- If the task is started but not completed, the status remains ‘Missing’.
- If the collection date is entered, the status updates to ‘Collected’.
- When the drop-off or shipment date is recorded, the status changes to ‘Completed- In Transit’.

- If the specimen does not meet the expected quantity or volume, the system assigns 'Completed – Not Met'.
- If all requirements are met, the status updates to 'Completed – Met'.
- If an expectation is removed, it appears as 'Expectation Removed' in GlobalTrace.

Expectations							
		SPECIMENS		ARTIFACTS			
MISSING (13)		COLLECTED (0)	COMPLETED - IN TRANSIT (0)	COMPLETED - NOT MET (1)	COMPLETED - MET (1)	EXPECTATION REMOVED (0)	ALL (15)
Participant	Visit	Target Date	Type	Purpose	Actual Expected Qty	Actual Expected Vol	Status
SITE1002	Day 1		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1003	Day 1		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1002	Day 2		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1003	Day 2		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
SITE1001	Day 3		Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing

Updating a specimen's expectation status

You can manually update specimen expectation statuses by recording collection and shipment details in ePRO. This ensures that GlobalTrace reflects real-time specimen tracking.

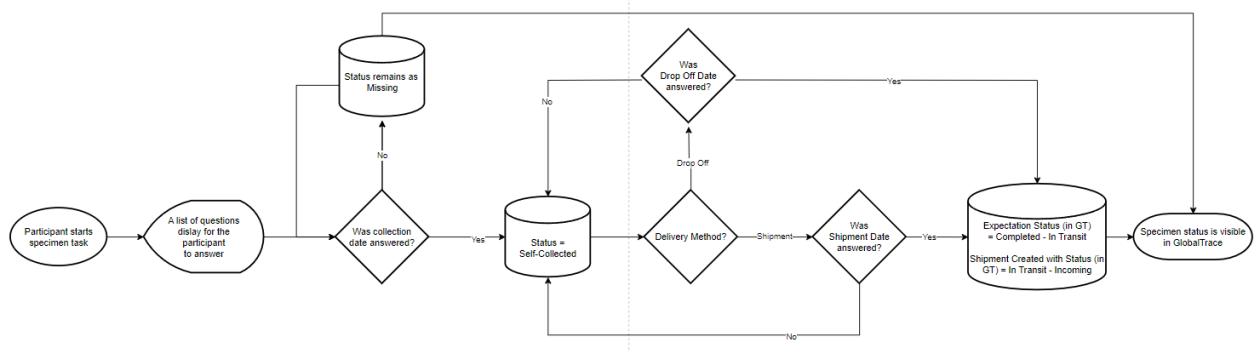
Steps to update the expectation status of a specimen:

1. Locate the specimen task under the **Expectations** page in GlobalTrace.
2. If the specimen is 'Missing', initiate the collection process in ePRO.
3. Enter the collection date in ePRO to update the status to 'Collected'.
4. If the specimen is being shipped, enter the drop-off date or shipment details in ePRO.
5. After the shipment details are recorded, the status updates to 'Completed- In Transit' in GlobalTrace.
6. If the collected specimen does not meet the required quantity or volume, the system updates the status to 'Completed-Not Met'.
7. If the specimen meets the expected criteria, the status updates to 'Completed – Met'.

Workflow for self-collected specimens

The system tracks self-collected specimens based on participant actions in ePRO. The status updates dynamically as participants collect, package, and ship their specimens.

1. The participant starts a specimen task in ePRO.
2. A list of questions appears for the participant to answer.
3. If no collection date is entered, the status remains 'Missing'.
4. When the collection date is provided, the status updates to 'Self-Collected'.
5. If the drop-off date is provided, the status updates to 'Completed- In Transit'.
6. If a shipment is created, the status updates to 'In Transit – Incoming'.
7. Once the shipment is received and verified, the system updates the status to 'Completed – Met' or 'Completed- Not Met' depending on the collected quantity and volume.



Viewing specimen and artifact expectation audit history

You can view the audit history of specimen expectations by selecting a specimen in GlobalTrace. The audit history includes:

- Timestamps for each status change.
- User actions that triggered the update.
- ePRO data entries that affected the specimen status.

The screenshot shows the 'Audit History' section for a specimen named 'Participant SITE1002 (Missing)'. The table lists five rows of changes:

Time of Change	Name	Field Changed	Old Value	New Value	Change Reason
2025-03-13 12:14:58 am	System	Expect Reason			Updated By System
2025-03-13 12:14:58 am	System	Expected Quantity	1		Updated By System
2025-03-13 12:14:58 am	System	Expected Volume	7.5		Updated By System
2025-03-13 12:14:58 am	System	Actual Quantity	0		Updated By System
2025-03-13 12:14:58 am	System	Actual Volume	0		Updated By System

Below the table, there is a summary row for the specimen:

SITE1001	Day 3	Whole Blood	For Future Research	▲ 0 1	▲ 0 7.5	Missing
----------	-------	-------------	---------------------	--	--	---------

Troubleshooting status issues

You may encounter status discrepancies due to missing or incorrect data. Verifying collection dates, shipment details, and expectation rules can help resolve these issues.

- If a specimen remains Missing, confirm whether the collection date was entered in ePRO.
- If a specimen is marked Completed- Not Met, verify that the recorded quantity and volume meet expectations.
- If a shipment status does not update, check if the drop-off date or shipment details were entered in ePRO.
- For removed expectations, review the system rules that triggered the removal.

Creating Shipments

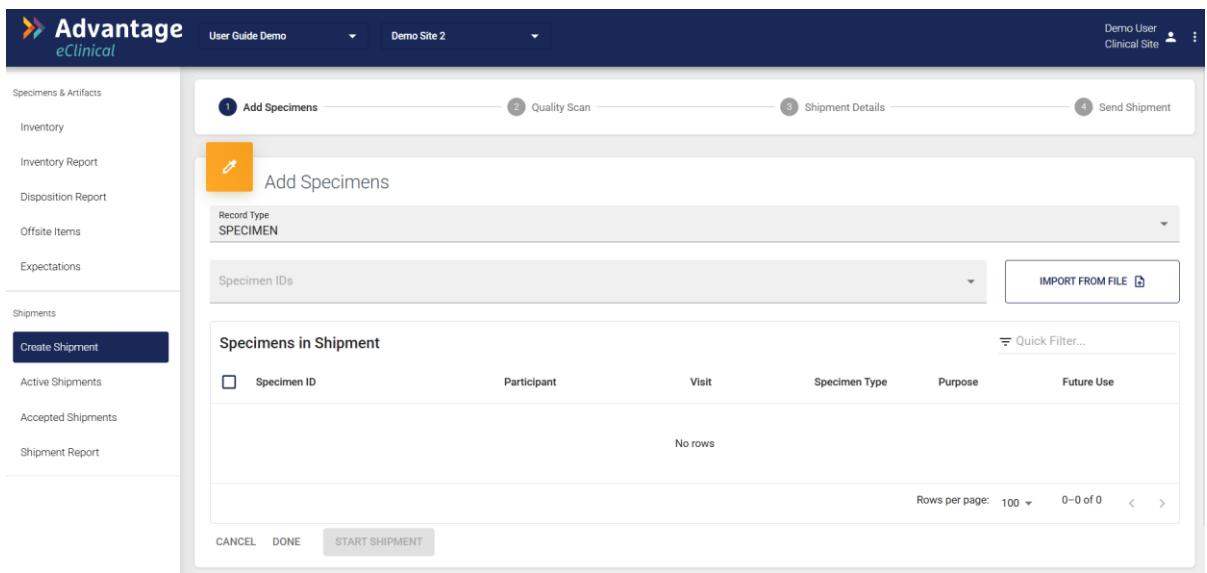
You can create and manage specimen shipments in GlobalTrace. The shipment process includes adding specimens, performing a quality scan, entering shipment details, and sending the shipment. This ensures proper tracking and documentation throughout the shipping workflow.

Adding specimens to a shipment

You must add specimens or artifacts to the shipment before proceeding to ensure that all items included are properly recorded in GlobalTrace.

Steps to add specimens to a shipment:

1. Select **Create Shipment** from the side navigation menu. The **Add Specimens** page appears.



2. On the **Add Specimens** page, choose the 'Record Type' (Specimen or Artifact).
3. Add specimens or artifacts using the drop-down menu or the **IMPORT FROM FILE** option. The drop-down lists all available specimens or artifacts at the current site.
TIP: You can also scan barcodes to add specimens. Only valid specimens from the current site will be accepted into the shipment.
4. After at least one specimen is added, the **START SHIPMENT** button becomes available.

Specimens & Artifacts

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Offsite Items

Expectations

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Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

1 Add Specimens 2 Quality Scan 3 Shipment Details 4 Send Shipment

Add Specimens

Record Type
SPECIMEN

Specimen IDs
400400400

IMPORT FROM FILE

Specimens in Shipment

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400400400	SITE2-SITE2001	Day 1	EBUS-TBNA	For Future Research	

Rows per page: 100 | 1-1 of 1

CANCEL DONE START SHIPMENT

Version 2025-R1+875

- Select **START SHIPMENT**. The **Quality Scan** page appears.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

1 Add Specimens 2 Quality Scan 3 Shipment Details 4 Send Shipment

Quality Scan

Before sending the shipment, a quality scan confirms that the physical shipment matches the GlobalTrace shipment. If any discrepancies are found, you will be able to match the GlobalTrace shipment to the scanned specimens.

Specimen IDs

IMPORT FROM FILE

Match shipment to scanned specimens

VIEW DISCREPANCIES

BACK SCAN COMPLETE

SKIP QC SCAN

Version 2025-R1+875

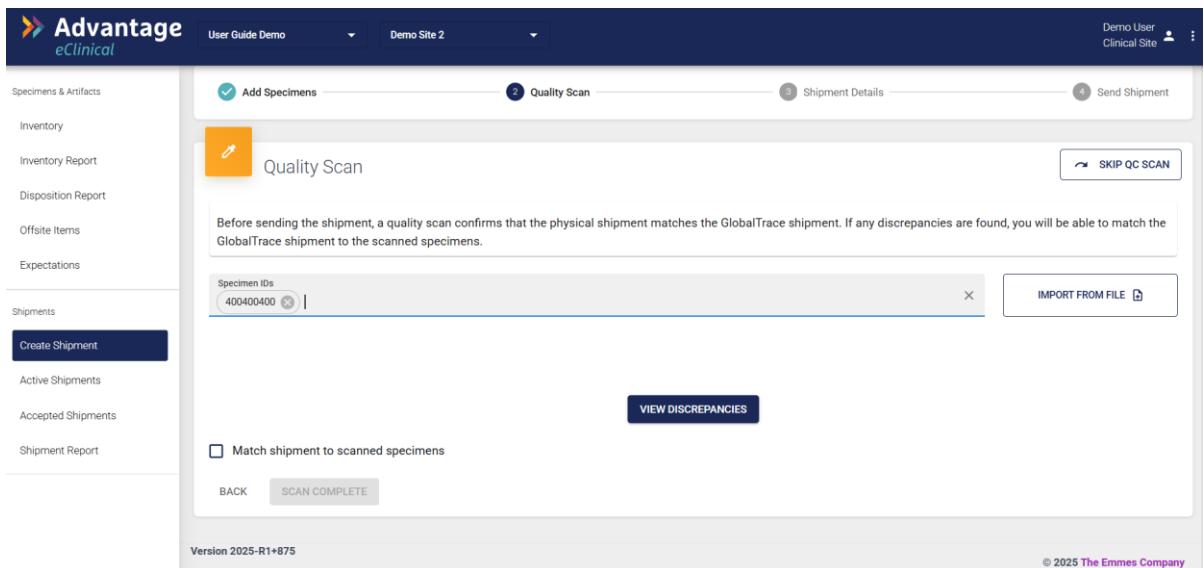
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Performing a quality scan

The quality scan verifies that the physical specimens match the electronic shipment records, helping you to identify and resolve discrepancies.

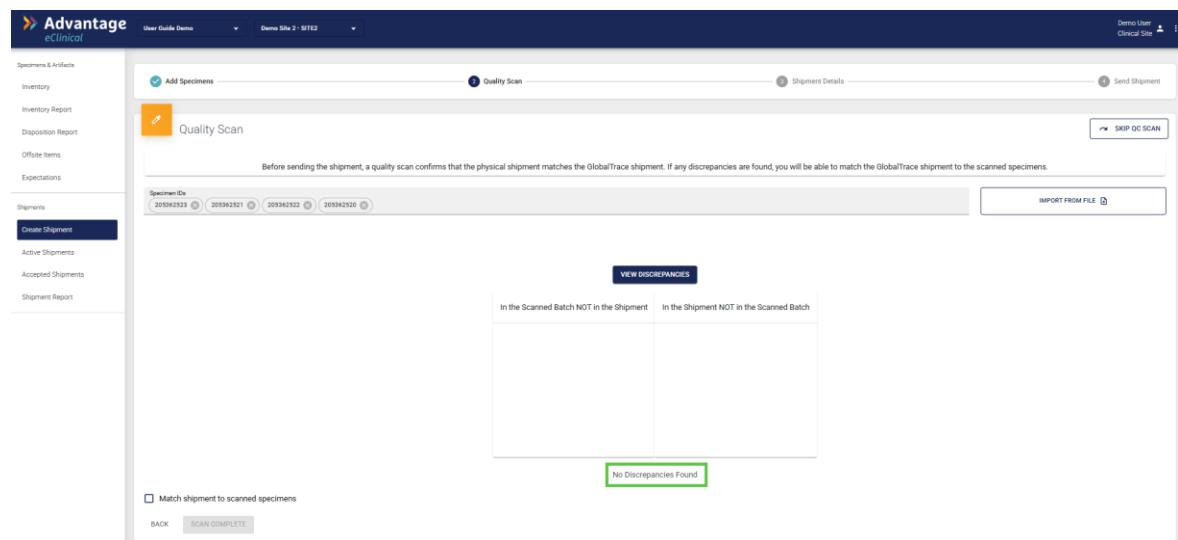
Steps to perform a quality scan:

- Enter one or more offspring specimens by scanning or manually inputting specimen IDs. Alternatively, select **IMPORT FROM FILE** to upload an Excel file containing identifiers.



1. Select **VIEW DISCREPANCIES** to check for:

- Specimens scanned but not in the electronic shipment.
- Specimens in the electronic shipment but not scanned.
- No Discrepancies Found



The screenshot shows the Advantage eClinical software interface. At the top, there is a navigation bar with the logo 'Advantage eClinical', 'User Guide Demo', 'Demo Site - SITE1', and user information 'Demo User Clinical Site'. Below the navigation bar is a sidebar on the left containing links for 'Specimens & Artifacts' (Inventory, Inventory Report, Disposition Report, Offsite Items, Expectations), 'Shipments' (Create Shipment, Active Shipments, Accepted Shipments, Shipment Report), and a highlighted 'Create Shipment' button.

The main content area is titled 'Quality Scan' (Step 2). It displays a message: 'Before sending the shipment, a quality scan confirms that the physical shipment matches the GlobalTrace shipment. If any discrepancies are found, you will be able to match the GlobalTrace shipment to the scanned specimens.' Below this is a section for 'Specimen IDs' with a list containing '400400593' and a delete icon. There is also an 'IMPORT FROM FILE' button with a file icon.

A 'VIEW DISCREPANCIES' button is located above a table. The table has two columns: 'In the Scanned Batch NOT in the Shipment' and 'In the Shipment NOT in the Scanned Batch'. Under the first column, there is one entry: '400400593'. Under the second column, there is one entry: '400400601'.

At the bottom of the screen, there is a checkbox labeled 'Match shipment to scanned specimens', a 'BACK' button, and a 'SCAN COMPLETE' button. The footer of the page includes the text 'Version 2025-R1+908' and '© 2025 The Emmes Company'.

2. If discrepancies exist, determine the correction, add or remove the specimens as needed. The discrepancies listing updates as specimens are added or removed.
3. Or, select **Match shipment to scanned specimens** to override and continue.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes 'User Guide Demo' and 'Demo Site - SITE1'. On the right, there are links for 'Demo User', 'Clinical Site', and a user icon. The left sidebar has a 'Shipments' section with 'Create Shipment' highlighted in blue, and other options like 'Specimens & Artifacts', 'Inventory', 'Inventory Report', 'Disposition Report', 'Offsite Items', 'Expectations', 'Active Shipments', 'Accepted Shipments', and 'Shipment Report'. The main content area is titled 'Quality Scan' and displays a message: 'Before sending the shipment, a quality scan confirms that the physical shipment matches the GlobalTrace shipment. If any discrepancies are found, you will be able to match the GlobalTrace shipment to the scanned specimens.' It shows a list of 'Specimen IDs' with '400400593' selected. A 'VIEW DISCREPANCIES' button is present. Below, a table compares specimen status: 'In the Scanned Batch NOT in the Shipment' (400400593) and 'In the Shipment NOT in the Scanned Batch' (400400601). At the bottom, there's a checked checkbox for 'Match shipment to scanned specimens', a 'BACK' link, and a 'SCAN COMPLETE' button. The footer indicates 'Version 2025-R1+908' and '© 2025 The Emmes Company'.

4. Select **SCAN COMPLETE** to proceed. Optionally, select **SKIP QC SCAN** to bypass this step and continue. The **Shipment Details** page appears.

The screenshot shows the 'Shipment Details' page in the Advantage eClinical software. The top navigation bar includes 'User Guide Demo', 'Demo Site 2', and 'Demo User Clinical Site'. On the left sidebar, under 'Shipments', the 'Create Shipment' button is highlighted. The main form has tabs for 'Add Specimens', 'Quality Scan', 'Shipment Details' (which is selected), and 'Send Shipment'. The 'Shipment Details' tab contains fields for 'Destination*', 'Carrier*', 'Tracking Number' (with value '[0/200]'), and 'Comments' (with value '[0/2000]'). Below these is a table with columns: Specimen ID, Participant, Visit, Specimen Type, Purpose, and Future Use. One row is shown: 400400400, SITE2-SITE2001, Day 1, EBUS-TBNA, For Future Research, and Future Use. At the bottom are 'BACK' and 'CREATE SHIPMENT' buttons, and footer text 'Version 2025-R1+875' and '© 2025 The Emms Company'.

Entering shipment details

You must enter key shipment details, including the destination, carrier, to ensure proper routing and tracking of the shipment.

Steps to enter shipment details:

1. On the **Shipment Details** page, enter the following required fields:
 - Destination: Select from a dynamic list filtered by specimen type and purpose.
 - Carrier: Choose the shipping carrier.
 - Tracking Number (optional): If entered, GlobalTrace links to the carrier's system for real-time tracking.
 - Comments (optional): Add relevant shipment notes.

The screenshot shows the 'Create Shipment' screen in the Advantage eClinical software. The left sidebar has a dark blue header with the 'Advantage eClinical' logo and navigation links for 'User Guide Demo', 'Demo Site', 'Demo User Clinical Site', and a menu icon. The main content area has a light gray background. At the top, there are four circular buttons labeled 'Add Specimens', 'Quality Scan', 'Shipment Details' (with the number '3'), and 'Send Shipment'. Below this is a section titled 'Shipment Details' with fields for 'Destination*' (set to 'Demo Clinical Site'), 'Carrier*' (set to 'World Courier'), and 'Tracking Number' (set to '12345'). There is also a 'Comments' field containing '[0/2000]'. A table below lists specimens with the following data:

Specimen ID	Participant	Visit	Specimen Type	Purpose
400400502	SITE1-SITE1001	No Visit Associated	EBUS-TBNA	For Future Research
400400504	SITE1-SITE1001		WES	For Future Research

At the bottom of the screen, there are 'BACK' and 'CREATE SHIPMENT' buttons. The footer includes the text 'Version 2025-R0.1+879' and '© 2025 The Emes Company'.

- Review the list of specimens in the shipment and select **CREATE SHIPMENT**.

Sending the shipment

Before shipping, you must review the shipment details and confirm accuracy. The shipment is then finalized, and a manifest can be generated for documentation.

Steps to send a shipment:

- Review the shipment details for accuracy.

2. Check the **By checking this checkbox I am confirming that the shipment and specimen information is accurate** checkbox.
3. Select **PRINT MANIFEST** to generate the shipment manifest for documentation.
4. Select **SEND SHIPMENT** to finalize and send the shipment.

Generating the shipment manifest

You can generate a shipment manifest to document the shipment contents. The manifest can include optional unblinding information if needed.

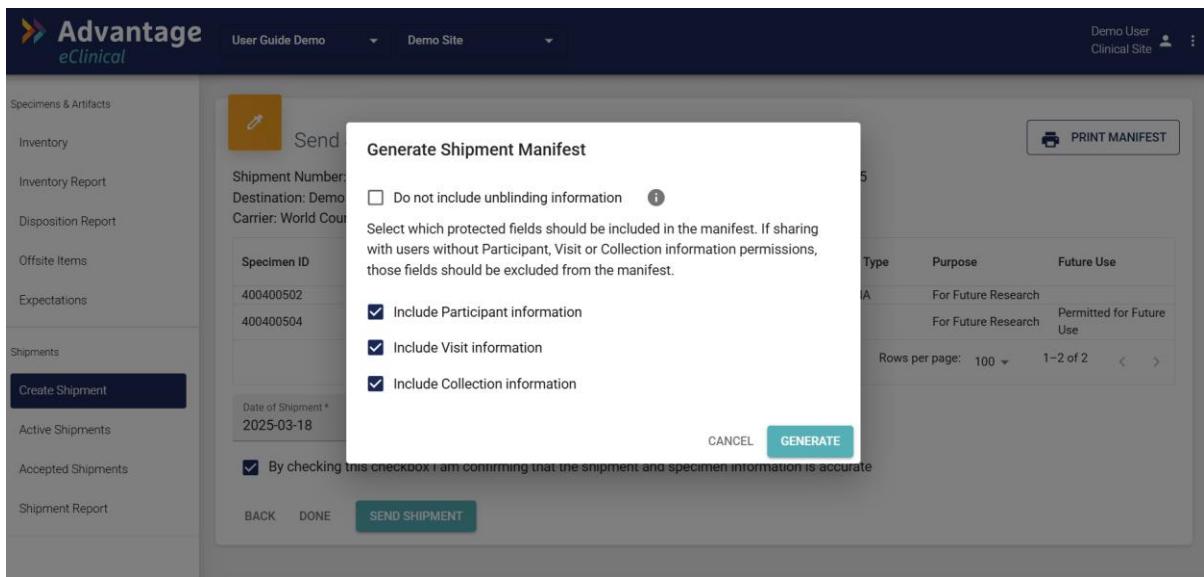
Steps to generate a shipment manifest:

1. Select **PRINT MANIFEST**. The **Generate Shipment Manifest** window appears.

The screenshot shows the 'Send Shipment' page in the Advantage eClinical system. At the top, there are four tabs: 'Add Specimens', 'Quality Scan', 'Shipment Details', and 'Send Shipment'. Below these tabs, the 'Send Shipment' section is displayed. It includes fields for 'Shipment Number' (51134493), 'Destination' (Demo Clinical Site), 'Carrier' (World Courier), 'Tracking Number' (12345), and 'Comments'. A table lists specimens with columns for 'Specimen ID', 'Participant', 'Visit', 'Specimen Type', 'Purpose', and 'Future Use'. Two rows are shown: one for EBUS-TBNA and another for WES. Below the table are buttons for 'BACK', 'DONE', and 'SEND SHIPMENT'. A modal dialog titled 'Generate Shipment Manifest' is open, containing a checkbox for 'Do not include unblinding information' and a 'GENERATE' button. The bottom of the screen shows the footer with version information (Version 2025-R0.1+879) and copyright (© 2025 The Emms Company).

This screenshot is identical to the one above, but the 'Generate Shipment Manifest' dialog is now closed, and the main 'Send Shipment' form is visible again. The specimen table and other interface elements remain the same.

2. By default, unblinding information is excluded. To include unblinding information:
 - a. Uncheck **Do not include unblinding information**.
 - b. Select any of the following fields to include:
 - Participant information (Participant ID)
 - Visit information (Visit number)
 - Collection information (Collection date and time)



3. Select **GENERATE**. The manifest downloads.

3/19/25, 10:47 AM

Global Trace

Advantage eClinical GlobalTrace

Study: User Guide Demo

Shipment Number: 51134493	Date of Shipment: 2025-03-18
Date Created: 2025-03-18	Tracking Number: 12345
Carrier: World Courier	Comments:
From: Demo Site	Address: 100 Main St. Baltimore, MD 12345
To: Demo Clinical Site	Address: 123 Main St. Rockville, MD 20850

Specimen ID	Participant	Visit	Specimen Type	Future Purpose	Collection Use	Date	Volume
400400502	SITE1-SITE1001	No Visit Associated	EBUS-TBNA	For Future Research			
400400504	SITE1-SITE1001		WES	For Future Research	Permitted for Future Use		

Total: 2

Managing Active Shipments

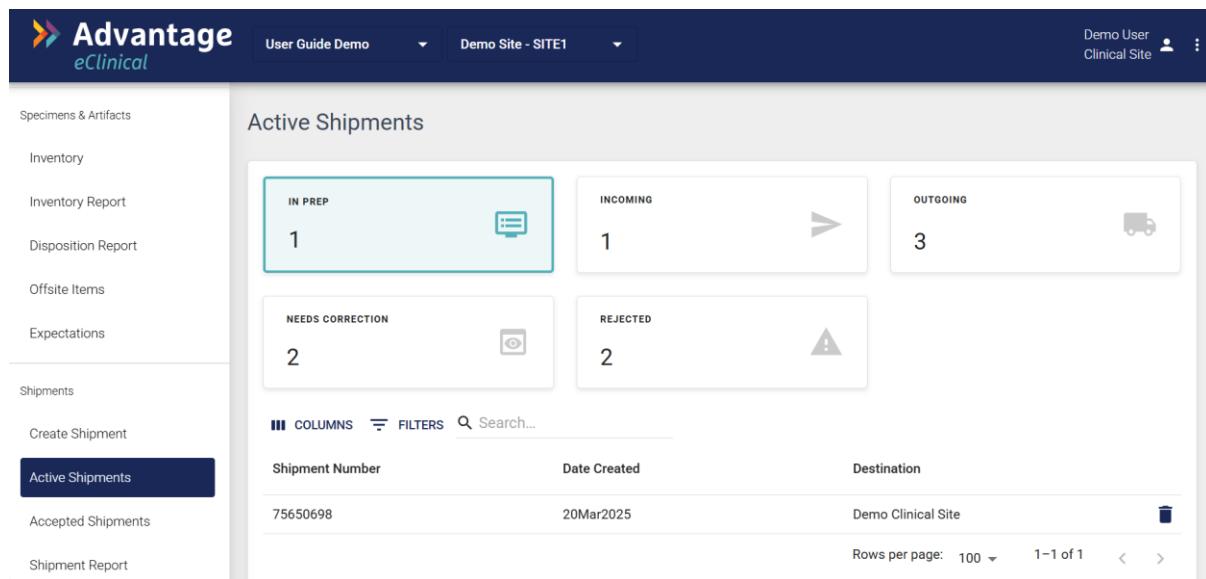
You can manage active shipments in GlobalTrace, including shipments in preparation, in transit, and rejected shipments requiring correction. The system tracks shipment statuses to help users ensure compliance, accuracy, and timely processing.

Viewing and updating in prep shipments

You can track and update shipments that have been created but not yet sent.

Steps to view and update in prep shipments:

1. Go to the **Active Shipments** page.
2. In the 'IN PREP' section, locate shipments that are still being prepared.
3. Select a shipment to continue the shipment process from where it was left off.



The screenshot shows the GlobalTrace interface for managing active shipments. On the left, a sidebar lists navigation options: Specimens & Artifacts, Inventory, Inventory Report, Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments (which is selected and highlighted in blue), Accepted Shipments, and Shipment Report. The main content area is titled 'Active Shipments' and displays four categories of shipments: 'IN PREP' (1 item), 'INCOMING' (1 item), 'OUTGOING' (3 items), 'NEEDS CORRECTION' (2 items), and 'REJECTED' (2 items). Below these categories is a table with columns for 'Shipment Number', 'Date Created', and 'Destination'. A single row is visible in the table: '75650698' (Date Created: 20Mar2025, Destination: Demo Clinical Site). At the bottom of the table are pagination controls: 'Rows per page: 100', '1–1 of 1', and navigation arrows. The top right corner of the interface shows the user information 'Demo User Clinical Site'.

4. Make the necessary updates and select the **By checking this checkbox I am confirming that the shipment and specimen information is accurate** checkbox.
5. Select **SEND SHIPMENT**.

Deleting in prep shipments

You can remove shipments from ‘In Prep’ if you have the ‘Delete Shipments’ permission.

Steps to delete in prep shipments:

1. Locate the shipment under ‘In Prep’ and click the trash can icon to delete the shipment.

NOTE: Deleting a shipment returns all specimens or artifacts to ‘Available’ status in inventory.

Viewing in transit shipments

You can monitor shipments currently in transit, whether incoming to their site or outgoing to another, to ensure timely receipt or delivery.

Incoming shipments

You can track shipments being sent to your site.

Steps to track incoming shipments:

1. Locate the shipments under 'INCOMING' in the **Active Shipments** page.

Shipment Number	Date of Shipment	Sender	Tracking Number	Carrier
55861840	24Mar2025	Test Site 3		World Courier

2. Select a shipment to view its details.

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
00011	SITE1-SITE10003	Day 1	Whole Blood	For Future Research	Not Known at This Time

Outgoing shipments

You can track shipments that have been sent from your site but not yet received by the destination.

Steps to track outgoing shipments:

1. Locate the shipments under 'OUTGOING' in the **Active Shipments** page.

Shipment Number	Date of Shipment	Destination Site	Tracking Number	Carrier
35929721	21Mar2025	Demo Site 2	085715940070	UPS
97545287	21Mar2025	Test Site 5	12345	FedEx
58990712	12Mar2025		12345	UPS

2. View shipments that are still in transit to other sites.
3. Select a shipment to open its shipment details.

NOTE: You can click the tracking status icon to open the official courier page, where you can view real-time tracking details for the shipment.

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
80001	SITE1-SITE1001	Day 1	Whole Blood	For Future Research	Permitted for Future Use

Viewing and updating rejected shipments requiring correction

You can track and correct shipments rejected by the receiving site due to discrepancies.

Steps to view and correct rejected shipments that require correction:

1. Locate the shipments under 'NEEDS CORRECTION' in the **Active Shipments** page.

Active Shipments

IN PREP	INCOMING	OUTGOING
1	1	3

NEEDS CORRECTION	REJECTED
2	2

Shipment Number Rejecting Site Shipment Rejection Explanation Rejection Date

| 51134493 | Demo Clinical Site | Rejected - resend | 21Mar2025 |
| 93412803 | Demo Distributor Site | The sample is not found in the shipment. | 21Mar2025 |

Rows per page: 100 1–2 of 2

- Select a shipment to open its shipment details.

Shipment Details

Specimen ID: 022620255 Participant: JDTSTCLN-UAT001 Visit: Specimen Type: WES Purpose: For Future Research Future Use: Permitted for Future Use

Date Created: 2025-03-21 Date of Shipment: 2025-03-21 Carrier: World Courier
Tracking Number:
Comments:

Shipment Status: Rejected
Shipment Rejection Explanation: Rejected the shipment.

Specimen ID Participant Visit Specimen Type Purpose Future Use

| 022620255 | JDTSTCLN-UAT001 | | WES | For Future Research | Permitted for Future Use |

Rows per page: 100 1–1 of 1

→ CORRECT SHIPMENT

- Select **CORRECT SHIPMENT** to review the rejection explanation and required corrections.
- Make necessary updates based on the rejection reason:
 - Remove extra specimens from the shipment.
 - Add missing specimens to the shipment.
 - Modify specimen details if needed.

- Select **START SHIPMENT** to navigate through the shipment process and resend the corrected shipment.

Viewing rejected shipments awaiting correction by sending site

You can view shipments rejected by the receiving site and awaiting correction from the sending site.

Steps to view rejected shipments awaiting correction:

- Locate the shipments under 'REJECTED' in the **Active Shipments** page.

Shipment Number	Sending Site	Shipment Rejection Explanation	Rejection Date
57829728	Test Site 3	Rejected	24Mar2025
47363421	Demo Clinical Site	Missing samples.	21Mar2025

- View shipments pending updates from the sending site.
- Select a shipment to open its shipment details.

Advantage
eClinical

User Guide Demo Demo Site

Demo User Clinical Site

Shipment Details

Specimens & Artifacts

- Inventory
- Inventory Report
- Disposition Report
- Offsite Items
- Expectations

Shipments

- Create Shipment
- Active Shipments
- Accepted Shipments
- Shipment Report

Shipment Details

Shipment Number: 84516247
 Sending Site: Demo Site
 Destination: Demo Clinical Site
 Date Shipment Received: 2024-04-05
 Time Shipment Received: 04:55 AM
 Shipment Status: Rejected
 Shipment Rejection Explanation: update and resend

Date Created: 2022-03-25
 Date of Shipment: 2022-03-25
 Carrier: FedEx
 Tracking Number:
 Comments:

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
0002	007-001	Day 1	Whole Blood	For Future Research	Permitted for Future Use

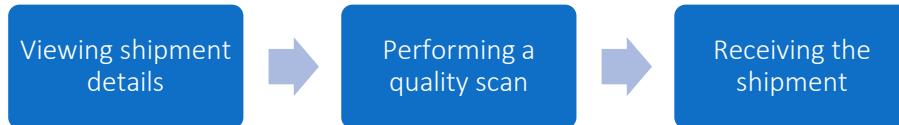
Rows per page: 100 ▾ 1-1 of 1 < >

Accepting or Rejecting Shipments

You can accept or reject a shipment after selecting it from the ‘Incoming’ section on the **Active Shipments** page.

Site shipment acceptance process

Site shipments come from a site, lab, or repository. The process involves three steps:

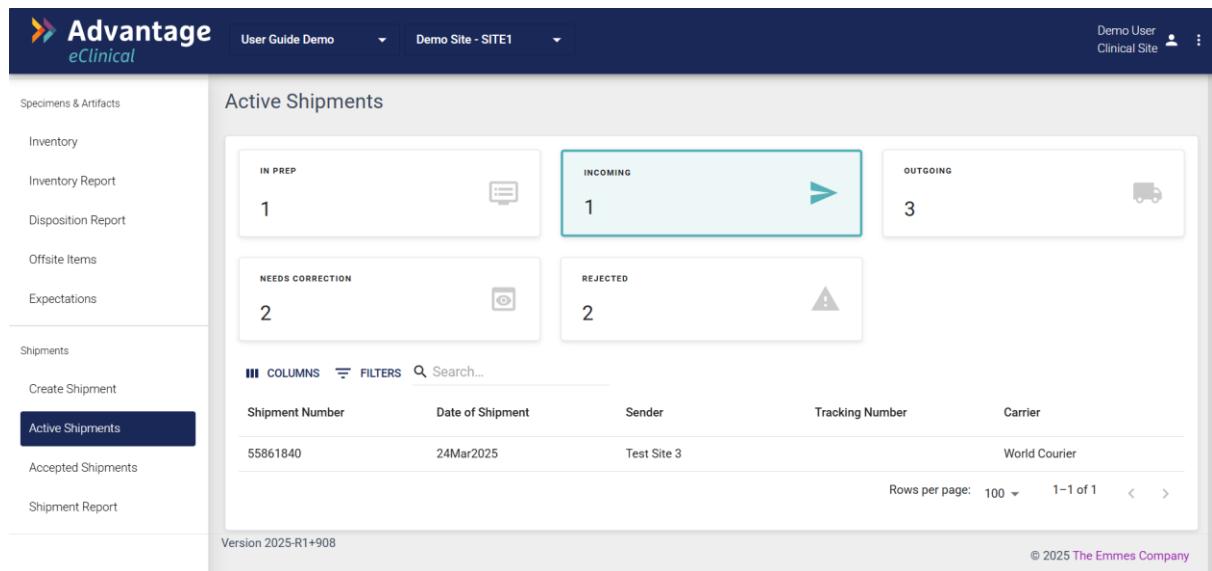


Viewing shipment details

Review shipment details before accepting or rejecting the shipment.

Steps to view shipment details:

1. Select the shipment from the ‘INCOMING’ section on the **Active Shipments** page.



Shipment Number	Date of Shipment	Sender	Tracking Number	Carrier
55861840	24Mar2025	Test Site 3		World Courier

2. Review the **Shipment Details** page to confirm the correct shipment.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes 'User Guide Demo', 'Demo Site', and user information for 'Demo User Clinical Site'. The left sidebar has sections for Inventory, Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments, Accepted Shipments, and Shipment Report. The main content area shows 'Active Shipments > Shipment Number: 27827363'. It displays shipment details: Shipment Number: 27827363, Sender: Demo Clinical Site, Destination: Demo Site, and Status: In Transit. To the right, there are buttons for 'PRINT MANIFEST' and 'HISTORY'. Below the shipment details is a table titled 'Specimen ID' with one row: 400400601, Participant: JDTSTCLN-UAT001, Visit: Day 1, Specimen Type: Bone Marrow Aspirate, Purpose: For Biometric Testing. There are also buttons for 'BACK', 'NEXT', and a dropdown for 'Rows per page: 100'.

If correct, select **NEXT** to proceed. If incorrect, close the page to return to the 'Active Shipments' list.

If you select **NEXT**, the **Quality Scan** page appears. The quality scan is optional. To perform a quality scan, see [Performing a quality scan](#). To skip this step, select **SKIP QC SCAN**. The 'Shipment Details' section of the **Create Shipment** page appears.

The screenshot shows the 'Quality Scan' page for Shipment Number: 27827363. The top navigation bar and sidebar are identical to the previous screenshot. The main content area has tabs for 'Shipment Details' (selected), 'Quality Scan' (selected), and 'Shipment Receive'. The 'Quality Scan' section contains a large orange 'Quality Scan' button and a 'SKIP QC SCAN' button. Below these are fields for 'Scan all Specimen IDs included in the shipment' and 'IMPORT FROM FILE' with a file icon. A 'VIEW DISCREPANCIES' button is located at the bottom right. Navigation buttons 'BACK' and 'NEXT' are at the bottom.

Accepting the shipment

Finalize the shipment by accepting or rejecting the specimens.

NOTE: The system auto-populates the 'Date and Time Received' but allows updates if necessary.

Steps to accept a shipment:

1. Review the list of specimens in the **Shipment Receive** page.

The screenshot shows the 'Shipment Details' page for Shipment Number 27827363. The top navigation bar includes 'User Guide Demo', 'Demo Site', and 'Demo User Clinical Site'. The left sidebar lists various clinical management modules. The main content area displays shipment details: SENDER (DEMO CLINICAL SITE), DATE CREATED (2025-03-21), DATE OF SHIPMENT (2025-03-21), CARRIER (WORLD COURIER), and TRACKING NUMBER (085715940070). Below this, a table lists a single specimen: Specimen ID (400400601), Participant (JDTSTCLN-UAT001), Visit (Day 1), Specimen Type (Bone Marrow Aspirate), Purpose (For Biometric Testing), Future Use (Accepted), and Rejection Reason (None). Buttons for 'ACCEPT SHIPMENT' and 'REJECT SHIPMENT' are at the bottom.

2. Select EVALUATE ALL to bulk accept or reject specimens.

NOTE: To accept a shipment, all specimens must be marked either Accepted or Ruined in Transit.

This screenshot shows the same Shipment Details page as above, but with a mouse cursor hovering over the 'EVALUATE ALL' dropdown menu. A context menu is displayed with two options: 'Accept' and 'Reject'. The rest of the page content remains the same, including the shipment details and the specimen table.

3. If rejecting, provide a 'Rejection Reason'.

The screenshot shows the 'Active Shipments' page in the Advantage eClinical software. The left sidebar includes links for Specimens & Artifacts, Inventory, Inventory Report, Disposition Report, Offsite Items, Expectations, Shipments, Create Shipment, Active Shipments (which is selected), Accepted Shipments, and Shipment Report. The main content area shows a table with columns: Specimen Type, Purpose, Future Use, EVALUATE ALL, and Rejection Reason. One row is shown: Bone Marrow Aspirate, For Biometric Testing, with a 'Rejected' button. A dropdown menu for 'REASON' is open, listing: Insufficient Volume, Missing, Other, and Wrong Type. Buttons for 'PRINT MANIFEST' and 'HISTORY' are at the top right.

4. Select **ACCEPT SHIPMENT** to finalize the shipment transfer.

NOTE: If specimens were 'Ruined in Transit', their status updates to 'Not Available'.

If rejecting the entire shipment, select **REJECT SHIPMENT** and provide a reason.

Rejecting a shipment

Rejecting a shipment requires providing a reason so the sender can correct any issues.

Steps to reject a shipment:

1. On the **Shipment Receive** page, evaluate all specimens in the selected shipment.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

← Active Shipments > Shipment Number: 55861840

Shipment Details

Quality Scan

Shipment Receive

SENDER	DATE CREATED	DATE OF SHIPMENT	CARRIER	TRACKING NUMBER
TEST SITE 3	2025-03-24	2025-03-24	WORLD COURIER	

COMMENTS

Date Shipment Received * 2025-03-25

Time Shipment Received * 16:09

Specimen ID	Participant	Visit	Specime...	Purpose	Future Use	EVALUATI	Rejection...
400400594	SITE3-SITE3001	Day 14	Tissue	For Future Research		EVALUATE	REJECT
400400595	SITE3-SITE3001	Day 14	Tissue	For Future Research		EVALUATE	REJECT

Rows per page: 100 1–2 of 2

BACK ✓ ACCEPT SHIPMENT ✘ REJECT SHIPMENT

- Select the **EVALUATE** dropdown for the specimen and then select one of the options provided.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

← Active Shipments > Shipment Number: 55861840

Shipment Details

Quality Scan

Shipment Receive

SENDER	DATE CREATED	DATE OF SHIPMENT	CARRIER	TRACKING NUMBER
TEST SITE 3	2025-03-24	2025-03-24	WORLD COURIER	

COMMENTS

Date Shipment Received * 2025-03-25

Time Shipment Received * 16:09

Specimen ID	Participant	Visit	Specime...	Purpose	Future Use	EVALUATI	Rejection...
400400594	SITE3-SITE3001	Day 14	Tissue	For Future Research		EVALUATE	REJECT
400400595	SITE3-SITE3001	Day 14	Tissue	For Future Research		EVALUATE	REJECT

Rows per page: 100 1–2 of 2

BACK ✓ ACCEPT SHIPMENT ✘ REJECT SHIPMENT

EVALUATE

- Accept
- Reject
- Ruin In Transit
- Not Evaluated

- If rejecting, provide a 'Rejection Reason'.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

User Guide Demo

Demo Site

PRINT MANIFEST

HISTORY

Specimen ID: 400400594, Participant: SITE3-SITE3001, Visit: Day 14, Specie...: Tissue, Purpose: For Future Research

Specimen ID: 400400595, Participant: SITE3-SITE3001, Visit: Day 14, Specie...: Tissue, Purpose: For Future Research

EVALUATI Rejection...

Rejected REASON Insufficient Volume
 Missing
 Other
 Wrong Type

EV BACK ACCEPT SHIPMENT REJECT SHIPMENT

4. Select **REJECT SHIPMENT** to reject the entire shipment.
5. Enter the reason for rejection when prompted.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsite Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

User Guide Demo

Demo Site

PRINT MANIFEST

HISTORY

SHIPMENT REJECTION EXPLANATION

[0/200]

SAVE

ture Use EVALUATI Rejection...

Rejected Missing Accepted

100 1–2 of 2 BACK ACCEPT SHIPMENT REJECT SHIPMENT

6. Provide additional comments if necessary.
7. Select **SAVE** to finalize the rejection.

NOTES:

- The recipient does not need to return the physical shipment to the sender. However, the electronic shipment must be rejected in GlobalTrace with a rejection reason so the sender can make corrections.
- If a shipment contains missing or extra specimens, list these in the **SHIPMENT REJECTION EXPLANATION** field.
- If individual specimens are rejected due to missing items, incorrect types, or insufficient volume, enter the details in the **Rejection Reason** field. This information appears to the sender when they view the rejected shipment.

- Rejecting a shipment does not require rejecting all specimens. Accept the ones that are correct and reject only those that need correction. This approach makes it easier for the sender to correct issues and resubmit the shipment.
- After the sender corrects the electronic shipment, it returns to the 'In Transit – Incoming' section of the **Active Shipments** page.

Accepted Shipments

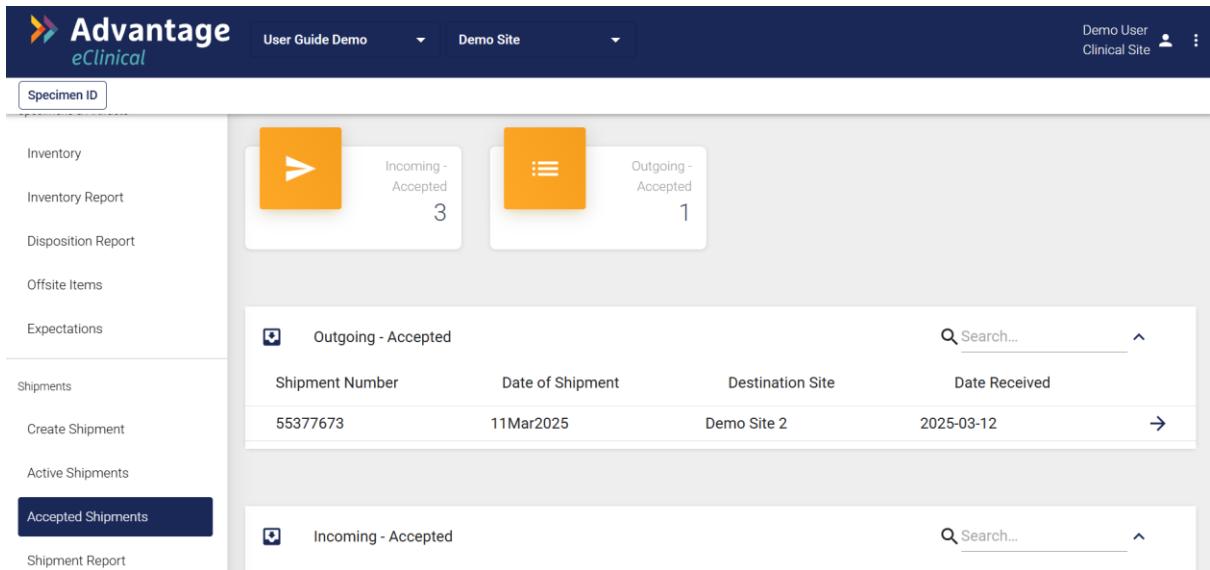
The **Accepted Shipments** page provides a record of all shipments that have been successfully received and accepted by your site or by another site when your site was the sender. This allows for easy tracking of completed shipments.

Viewing incoming accepted shipments

The **Incoming Accepted** table lists all shipments that your site has received and accepted.

Steps to view incoming accepted shipments:

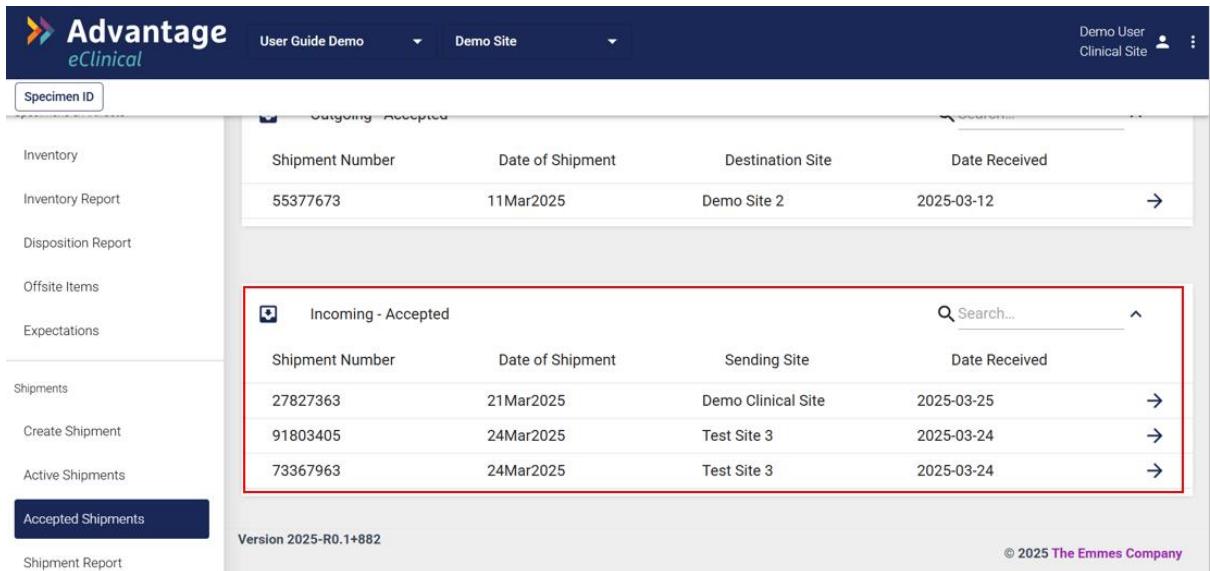
1. Go to the **Accepted Shipments** page from the ‘Shipments’ section.



Shipment Number	Date of Shipment	Destination Site	Date Received
55377673	11Mar2025	Demo Site 2	2025-03-12

Shipment Number	Date of Shipment	Sending Site	Date Received
27827363	21Mar2025	Demo Clinical Site	2025-03-25
91803405	24Mar2025	Test Site 3	2025-03-24
73367963	24Mar2025	Test Site 3	2025-03-24

2. Under ‘Incoming – Accepted’, review the list of shipments.



Shipment Number	Date of Shipment	Destination Site	Date Received
55377673	11Mar2025	Demo Site 2	2025-03-12

Shipment Number	Date of Shipment	Sending Site	Date Received
27827363	21Mar2025	Demo Clinical Site	2025-03-25
91803405	24Mar2025	Test Site 3	2025-03-24
73367963	24Mar2025	Test Site 3	2025-03-24

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- Select a shipment row to open the **Shipment Details** page.

Specimens & Artifacts

Inventory

Inventory Report

Disposition Report

Offsites Items

Expectations

Shipments

Create Shipment

Active Shipments

Accepted Shipments

Shipment Report

X Shipment Details

Shipment Number: 27827363
Sending Site: Demo Clinical Site
Destination: Demo Site
Date Shipment Received: 2025-03-25
Time Shipment Received: 03:42 PM
Shipment Status: Accepted

Date Created: 21Mar2025
Date of Shipment: 21Mar2025
Carrier: World Courier
Tracking Number: 085715940070

Comments:

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400400601	JDTSTCLN-UAT001	Day 1	Bone Marrow Aspirate	For Biometric Testing	

Rows per page: 100 1-1 of 1 < >

- On the **Shipment Details** page, review:

- Shipment Number
- Date of Shipment
- Sending or Receiving Site
- Date Received

- If additional information is needed, refer to the shipment's history or associated records.

NOTE: Accepted shipments cannot be modified but remain accessible for auditing and tracking purposes.

Viewing outgoing accepted shipments

The **Outgoing Accepted** table lists all shipments sent from your site that have been received and accepted by the recipient site.

Steps to view outgoing accepted shipments:

- Go to **Accepted Shipments** page from the 'Shipments' section.
- Under 'Outgoing – Accepted', review the list of shipments.

The screenshot shows the Advantage eClinical software interface. The top navigation bar includes 'User Guide Demo' and 'Demo Site' dropdowns, and a 'Demo User Clinical Site' profile icon. The left sidebar menu has 'Specimen ID' selected. The main content area displays two tables under 'Accepted' status:

- Outgoing - Accepted:**

Shipment Number	Date of Shipment	Destination Site	Date Received
55377673	11Mar2025	Demo Site 2	2025-03-12
- Incoming - Accepted:**

Shipment Number	Date of Shipment	Sending Site	Date Received
27827363	21Mar2025	Demo Clinical Site	2025-03-25

- Select on a shipment row to open the **Shipment Details** page.

The screenshot shows the 'Shipment Details' page for Shipment Number 55377673. The left sidebar menu has 'Accepted Shipments' selected. The main content area includes:

- Shipment Details:**

Shipment Number: 55377673	Date Created: 12Mar2025
Sending Site: Demo Site	Date of Shipment: 11Mar2025
Destination: Demo Site 2	Carrier: DHL
Date Shipment Received: 2025-03-12	Tracking Number:
Time Shipment Received: 11:42 PM	Comments:
Shipment Status: Accepted	
- Specimens & Artifacts:**

Specimen ID	Participant	Visit	Specimen Type	Purpose	Future Use
400500212	SITE1-SITE1001	Day 1	EBUS-TBNA	For Future Research	

- On the **Shipment Details** page, review:

- Shipment Number
- Date of Shipment
- Sending or Receiving Site
- Date Received

- If additional information is needed, refer to the shipment's history or associated records.

NOTE: Accepted shipments cannot be modified but remain accessible for auditing and tracking purposes.

Viewing Shipment Report

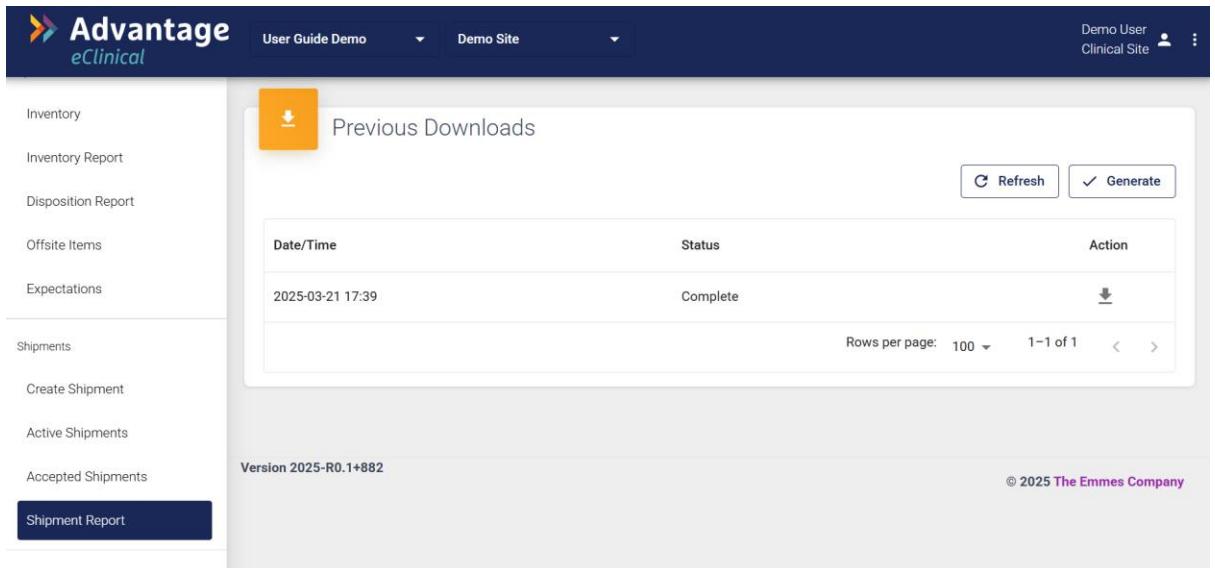
You can generate and download reports containing shipment details in the **Shipment Report** page to get visibility into shipment activity and auditing needs.

Generating and downloading a shipment report

You can track previously generated reports, check their status, and download them for review.

Steps to generate and download a shipment report:

1. Go to the **Shipment Report** page and select **Generate** to generate the report.
The system processes the request and lists the report under ‘Previous Downloads’ with a timestamp.



Date/Time	Status	Action
2025-03-21 17:39	Complete	

Rows per page: 100 1-1 of 1

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2. Select **Refresh** to update the report status.
3. If the report status changes to ‘Complete’, click the **Download** icon under the ‘Action’ column. The report downloads as an Excel file (.xlsx).



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