

Sample Management Analytics 25.1 Sheet Descriptions Table

There are 15 standard public sheets in this version.

Sheet	Information included
Home Page	<p>Use this sheet to view a high-level status of the sample ecosystem.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Time Point, Sample Type, and Current Location • KPIs <ul style="list-style-type: none"> - System Overview: Total Studies, Total Sites, Total Subjects, Total Labs, Total Sample Types, Total Samples, Total Samples at Intermediate Labs, Total Samples in Transit from Labs, Total Samples at Sites, and Total Samples at Final Labs • Total Sample Bar Charts <ul style="list-style-type: none"> - Total Samples at Investigator Sites - Total Samples at Intermediate Labs - Total Samples in Transit - Total Samples at Final Labs • Links to other sheets <ul style="list-style-type: none"> - View Samples: Sample Flow - Create Report: Sample Overview Report Builder - Explore Data: Subject Overview • Listing table: Derived Sample Histories
Sample Flow	<p>Use this sheet to view a graphical presentation of the journey each sample has taken from site to final destination. Samples are shown by site, sample type, intermediate locations, and destination. One study must be selected.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Sample Type, Current Location, and Sample Flow Path • Total Sample Flow Thru Each Location: Sankey chart displaying the Site, Sample Type, Intermediate Locations, and Destination

Sheet	Information included
Sample Details by Collection Status	<p>Use this sheet to view a suite of high-level visualizations based on the collection status of each sample.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Sample Type, Schedule Status, and Collected? • Bar Charts <ul style="list-style-type: none"> - Samples by Collection (Collected/Not Collected) and Schedule Status (Per Schedule/Out of Schedule) - Samples by Collection Status (Collected/Not Collected) and Study - Samples by Collection Status (Collected/Not Collected) and Site - Samples by Collection Status (Collected/Not Collected) and Visit - Samples by Collection Status (Collected/Not Collected) and Type • Pie Charts <ul style="list-style-type: none"> - Total Collected Samples by Type - Total Uncollected Samples by Type - Total Collected Samples by Schedule Status • Listing table: Raw Sample Data
Sample Details by Location	<p>Use this sheet to view a suite of high-level visualizations based on the current location of each sample.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Time Point, Sample Type, and Current Location • Total Samples by Current Location Pie Chart • Bar Charts <ul style="list-style-type: none"> - Samples and Avg Days at Intermediate Location - Samples and Avg Days in Transit - Samples and Avg Days to Process • Listing table: Derived Sample Histories
Sample Details by Sample Status	<p>Use this sheet to view a suite of high-level visualizations based on the current status of each sample.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Sample Type, Current Location, and Last Status • Pie Charts <ul style="list-style-type: none"> - Samples by Last Status - Samples by Last Status Category • Bar Charts <ul style="list-style-type: none"> - Samples by Last Category and Status - Samples by Last Category and Type • Scatter Plots <ul style="list-style-type: none"> - Sample Count vs Warnings by Site - Sample Count vs Warnings by Location - Sample Count vs Losses by Site - Sample Count vs Losses by Location • Listing table: Derived Sample Histories

Sheet	Information included
Current Sample Locations	<p>Use this sheet to view visualizations that provide detailed location information of each sample.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Time Point, Sample Type, and Current Location • Duration Threshold: This highlights samples at a location longer than the defined threshold. Samples that exceed the defined threshold highlight yellow. • Display Sample IDs: By default, No is selected, use the drop-down to select Yes. • Pivot Tables <ul style="list-style-type: none"> - Current Sample Locations - Current Sample Counts by Type and Location
Sample Overview Report Builder	<p>Use this sheet to create configurable reports of sample locations, and expected vs collected samples by site, subjects, visits, time points, and / or aliquots.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Visit, Time Point, and Sample Type • Select the appropriate Yes or No to Display Sites, Display Subjects, Display Visits (only affects Expected vs Collected), Display Time Points, and Display Aliquot • Pivot Tables <ul style="list-style-type: none"> - Locations of Samples by Site and Subject - Expected vs Collected Samples by Site and Subject
Sample Details Report Builder	<p>Use this sheet to create configurable reports of sample details.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Visit, Time Point, and Sample Type • Select the appropriate Yes or No to Display Sites, Display Subjects, Display Visits, Display Time Points, and Display Aliquot • Pivot Table: Sample Details by Site and Subject
Subject Overview	<p>Use this sheet to view a suite of visualizations that allow in-depth investigation into sample-related activity for a subject. One study and subject must be selected for all charts to show data.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Time Point, Sample Type, and Aliquot • Listing Tables <ul style="list-style-type: none"> - Subject Status - Active Schedules for Selected Subject - Actual Visits for Selected Subject (Derived from all sources, including EDC and manifests) - Collected Samples for Selected Subject (includes location column)

Sheet	Information included
Schedule Overview	<p>Use this sheet to view visualizations that display all data related to sample collection schedules.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Time Point, Sample Type, and Aliquot • Schedule Metrics: # of Studies with Schedules / # of Studies, # of Schedule Cohorts / # of Schedule Sample Types, # of Subjects, # of Subjects with Schedule Assignments, and # of Subjects with Active Schedules • Pie Charts <ul style="list-style-type: none"> - Subjects with Active Schedules by Cohort - Subjects with Active Schedules by Sample Type • Listing Tables <ul style="list-style-type: none"> - Active Schedule Summary - Collection Schedules - Schedule Assignments - Active Schedules
Reconciler Results	<p>Use this sheet to compare sample data pre and post manifest reconciliation.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, and Sample Type • Listing Tables <ul style="list-style-type: none"> - Raw Sample Data: The fields in the Reconciler Fields column indicate which fields were used to reconcile each record. - Derived Sample Histories
Unreconciled Samples	<p>Use this sheet to compare unmatched samples from various sources to determine why they did not reconcile. Only collected samples are listed. Study, Subject, Sample Type, and Aliquot are always used in reconciling. Highlighted fields indicate additional reconciliation criteria. Comparison and Sample Type must be selected.</p> <ul style="list-style-type: none"> • Filters: Study, Comparison, and Sample Type • Listing Tables <ul style="list-style-type: none"> - Unmatched Source Samples: Comparison and Sample Type must be selected. Highlighted fields were used for reconciliation in addition to the standard fields. - Unmatched Target Samples: Comparison and Sample Type must be selected. Highlighted fields were used for reconciliation in addition to the standard fields.

Sheet	Information included
Missing or Delayed Samples	<p>Use this sheet to track collected samples and quickly identify those that have remained in a location or in transit for an extended period.</p> <ul style="list-style-type: none"> • Filters: Study, Site, Cohort, Subject, Visit, Time Point, Sample Type, and Aliquot • Enter thresholds: Days At Site Limit, Days In Transit Limit, and Days At Lab Limit. The charts will display green when values are below the defined threshold and red when they exceed the threshold. • Table and Chart <ul style="list-style-type: none"> - Samples At Site - Samples In Transit - Samples At Lab • Use the drop-down to view all samples or only the missing or delayed samples. • Listing Table: Derived Sample Histories
Data Anomalies	<p>Use this sheet to investigate discrepancies in pre and post reconciliation data. Highlighted cells indicate possible issues.</p> <ul style="list-style-type: none"> • Data is identified as anomalous when: <ul style="list-style-type: none"> - Sample Location Type is missing - Sample Location is missing - Sample Type is missing - Visit is missing - Sample ID is missing - Accession ID is missing - Sample Collection Y/N is Yes but Collection Date is missing - Sample Collection Y/N is No but Collection Date is provided - Sample Shipped but Received Date is missing - Sample processed but Received Date is missing - Sample stored but Received Date is missing - Sample processed but also shipped - Sample stored but also shipped - Sample not shipped but Shipped Date is provided - Received Date precedes Collection Date - Shipped Date precedes Collection Date - Shipped Date precedes Received Date • Filters: Study, Site, Cohort, Subject, Visit, Time Point, Sample Type, and Aliquot • Listing Tables <ul style="list-style-type: none"> - Raw Sample Data Issues - Subject Source Comparison (Comparison of subjects appearing in EDC vs listed in manifests) - Derived Sample History Issues

Sheet	Information included
Application Information	<p>Use this sheet to view application information.</p> <ul style="list-style-type: none"> • Application Name • Listing of What's New by Version • Listing of Data Last Refresh • Link to SDTM Standards • Glossary of KPIs • Listing of each sheet in the app with their descriptions • Links to Support and Contact Information • App version, deployed date/time, published date/time, last reloaded study, reload status, and user Identifier of user accessing the application