ACCUGENIX®

CUSTOMER WEB PORTAL

USER MANUAL

myaccount.accugenix.com

charles river

VERSION 3.3

contents

Introduction

The Charles River Accugenix® Customer Web Portal provides secure web-based functionality to allow customers to submit their Identification Request Forms electronically for sample submissions. For customers using our AccuBLAST® service, they can easily submit raw data sequence files (*.ab1) for analysis and interpretation. Additionally, customers can view their current and past Identification Request Forms, check on sample status, and download PDF files of both identification reports and invoices.

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Signing Up

To get started using the Customer Web Portal and create your account, simply go to **https://www.criver.com/about-us/new-accugenix-portal-account** and fill out the required information. Your dedicated Technical and Customer Support Specialist will provide you with a username and temporary password to allow you to log in to the Customer Web Portal. Should you have any questions related to the Customer Web Portal or to resolve any issues you may encounter, your Technical and Customer Support Specialist will be happy to assist you. Please send an e-mail to **DEL-AI@crl.com** or call 1.800.886.9654 or +1.302.292.8888 with questions.

Logging In

You can navigate to the Customer Web Portal sign-in page by either:

- Going to the **Customer Portals** web page and clicking on "Accugenix® Web Portal"
- Pointing your browser directly to **https://myaccount.accugenix.com/**

Either way, we recommend bookmarking the sign-in page for easier access in the future.

The web portal can be viewed in multiple languages. Simply select your desired language from the drop down menu. If no language is selected, the web portal will be displayed in English. The language will need to be selected for each session of the web portal.

On the sign-in page, enter your username (E-mail address) and password, as assigned by your Technical and Customer Support Specialist. Click the "Sign in" button to enter the site. If this is your first time logging in, you will be required to change your password on the next page. Otherwise, you will be taken to the Customer Web Portal home page. Customers can either set up a single username and password or request multiple usernames for their employee access. The user will have five attempts to enter the correct username and password. After five attempts, the user will have to contact the Customer Support Department (**DEL-AI@crl.com**) to regain access. If you lose or forget your username or password, contact our Technical and Customer Support Department at 1.800.886.9654, +1.302.292.8888 or E-mail a request to **DEL-AI@crl.com**. Alternatively, you can click the "Reset Password" link on the sign-in page.

Note: For security purposes, the login session will time-out after 20 minutes of inactivity. Otherwise, the user can log out at any time by clicking the "Logout" link in the upper navigation panel.

Creating A New Request Form

To create a new ID Request, click the "New Request" button (icon) in the navigation panel. Next, select the correct "Request Type" for the service you require. There are two request types you can choose: ID Request for all services (other than AccuBLAST®) and an AccuBLAST® Request for sequence data analysis and interpretation.

PAYMENT INFORMATION REQUIRED

Web portal request form submissions will require entry of either credit card information or a purchase order (PO). Selection of a purchase order will require the upload of a file (PDF, JPG, TIF, or PNG) which is easily performed with just a click of a button.

REPORT NOTIFICATION

Indicate the E-mail addresses (separated by a comma) of who shall receive notification of sample receipt and report availability. The recipient(s) will receive notification that their report(s) are available to download on the Customer Web Portal.

SAMPLE HANDLING

What would you like us to identify? Select from the drop-down menu either "ID Circled Colony Only" or "ID Dominant Colony Only." If our laboratory has any questions regarding what you will have identified, you will be contacted by our Technical and Customer Support Specialists for resolution.

DISPOSITION TYPE

Our default selection is "Discard" for Disposition Type. We discard samples 3 calendar weeks after the last due date of a sample on the request form. If you would like us to return your samples, please select "Return" and provide the Carrier Account number and we will return your samples to you.

TRACKING NUMBERS

Regardless of your carrier of choice, enter the tracking number(s) for the shipment to Charles River. If your shipment is not received within 48 hours, we will contact your shipping agent and provide you with the status of your shipment to us. You can also track your shipment by entering your specific Request number, open to view, and then click the tracking number. It will automatically take you to your specific carrier and display the location of your shipment. There are two boxes available for two separate tracking numbers, if needed.

ENTERING SAMPLE INFORMATION

The next landing page in the Customer Web Portal contains the test information table where sample information is entered. Sample information can be entered manually ("Web Entry") or imported ("Template Entry"). The import template is available as tab-delimited, .xls, and .xlsx as described below.

WEB ENTRY

To enter samples manually, indicate in the total number of samples for submission and press the "Add" button. Additional blank lines will be added to the test information table. Each line must be completed with the required test information (indicated with an asterisk):

- Customer Sample ID (this must match the sample)
- Select the Test from the drop-down menu (for more information on our service offerings go to **www.criver.com/accugenix**)
- Select your Turnaround Time
- Select the "Marketed" box for those samples which are recovered from a marketed product source
- Complete the Tracking and Trending metadata information for each entry (this can be done at the time of request creation or retrospectively)
- The Comments field should be used to specify the colony type you want identified or any other remarks you want to bring to our attention

When all sample information has been entered, continue by pressing the “Next” button. The request will be shown in preview mode. After verifying the information is correct, check the box to agree to the **terms and conditions** and electronically sign the Request Form, and press the “Submit” button. Click the “download” link to retrieve your completed IRF and include a printed copy in your shipment to Charles River. We will scan the barcode upon its receipt and you will be notified via E-mail.

TEMPLATE ENTRY

To upload sample information from an external system, format the tab-delimited, .xls, or .xlsx file and select “Upload.”

If you require assistance to upload files, please contact our Technical and Customer Support Department at 1.800.886.9654 or +1.302.292.8888, and they will walk you through the process.

When all sample information has been entered, continue by pressing the “Next” button. The request will be shown in preview mode. After verifying the information is correct, check the box to agree to the **terms and conditions** and electronically sign the Request Form, and press the “Submit” button. Click the “download” link to retrieve your completed IRF and include a printed copy in your shipment to Charles River. We will scan the barcode upon its receipt, and you will be notified via E-mail.

USING THE AUTO FILL FEATURE

To copy down specific fields in the test information table, use the “Auto Fill” feature. This feature eliminates having to re-enter sample information. Just press the corresponding field name button you want to copy. This will populate the contents of the field in the first line item to all samples in the table. You can use the Auto Fill feature in either the Web Entry or Template Entry mode.

Creating a New AccuBLAST® Request

To create a new AccuBLAST® Request, click the “New Request” icon on the home screen. Select the “AccuBLAST Request” button and click “Next.” Choose your payment method by selecting the “PO” or “Credit Card” tab. Enter the information as required. For “Report Notification,” enter the E-mail addresses for those who will receive notification of results (separated by a comma). Click “Next” to enter sample information.

SAMPLE INFORMATION

The next landing page in the portal contains the test information table where sample information is entered. Sample information can be either manually entered (Web Entry) or imported from a tab-delimited, .xls, or .xlsx file (Template Entry).

WEB ENTRY FOR ACCUBLAST® SAMPLES

For manual entry of sample files, select the “Web Entry” tab, and enter the number of samples for submission. Press the “Add” button. Additional blank lines will be added to the test information table. Fill out each of the test information lines as required.

TEMPLATE ENTRY FOR ACCUBLAST® SAMPLES

To upload sample information from an external system, format the tab-delimited, .xls, or .xlsx file as described in the document “Download Instructions.”

Note: If the sample information was imported from a template, the Forward File Name and Reverse File Name of the *.ab1 files to be attached must match the names in the table as imported. Otherwise, if the sample information is manually entered, the system will use the names of the *.ab1 files chosen when attaching them to the request.

USING THE AUTO FILL FEATURE

To copy down specific fields in the test information table, use the “Auto Fill” options. Click the corresponding field name button for those you would like to copy. This will populate the contents of the field in the first line item to all samples in the table. You can use the Auto Fill feature in either the Web Entry or Template Entry methods.

ATTACHING SEQUENCE DATA FILES

For AccuBLAST® requests, the forward and reverse files must be attached to the request form. Click the "Attach Forward and Reverse Files" button to navigate to the file attachment page. Select the forward and reverse file for each sample that is listed on the test information table using the "Choose File" buttons. Press "Done" when finished. This is the identical process for both web and template sample entry methods.

Press the "Next" button when all samples and their corresponding files have been entered. The request will be shown in preview mode. Check the box to electronically sign and agree to the terms and conditions. Press the "Submit" button and "download" and print the file if you would like to retain a hard copy for your records.

Viewing Request Forms

The "View Request" page allows the user to filter and view the status of previously submitted request forms. To navigate to the "View Request", click the icon on the home page or the link in the navigation panel. Additionally, this allows the client to check the status of testing by the following categories:

- New – Recent shipment has not yet been received
- In Process – Samples are being tested by our laboratory
- Completed – Processing has been completed and results are ready

The default view shows all submitted request forms. Use the check box filters and press the "Show" button to filter the request forms listed. Filter parameters are: Status (New, In Progress, or Completed) and Request Type. Alternatively, use the search field to search for a specific Request Code number or a specific customer sample identification designation.

Viewing Invoices

The View Invoice page allows users to view invoices for a specific Request Code. Use the search field at the top of the frame to search for a specific request or navigate through all the requests using the paging buttons at the bottom. Click the request number to view the Invoice Details. On the Invoice Details page, click the Invoice # to view the associated invoice for each sample.

Viewing C# Reports

The View C# Reports page allows users to view reports for completed samples on a specific Request Form. Use the search fields at the top of the frame to search for a specific Request or search by your customer sample identification designation. Alternatively, navigate through the listed Request numbers using the paging buttons at the bottom of the screen. Click the Request number to view the C# Report details. If a sample has multiple test methods assigned to it, all results will be under the same C# and the tag at the end of the seven-digit number will be reflective of the specific test method. Click the "Download" button for a specific Sample ID or use the check box column on the right to select multiple reports to be downloaded at once. When the desired reports are selected, press the "Download" button. To consolidate all selected reports for downloading into a single PDF document, click the "Merge" button. Your web browser will then download a .zip archive file of the requested reports.

If your computer does not support unzipping files, download a free version of the ZIP utility from **http://www.winzip.com**. Check with your IT department for more information.

Tracking & Trending Capabilities

The Customer Web Portal also provides secure, compliant, and powerful data management tools that can assist customers with tracking and trending microorganisms isolated from their facility. Tracking & Trending allows users to choose from a wide range of pre-defined reports that can be generated for samples meeting specific criteria and generate a list that can be exported for further analyses.

Click on the Tracking & Trending icon to arrive at the Repository of reports available. Each report defaults to the previous 3 months of sample data. To change this, you can use the options icon in the upper right corner of the report.

Using the Search Bar

A search bar is located on the Customer Web Portal home page. The user can type in a portion of their Customer Sample ID and all samples containing those characters will be listed. Aa link to the IRF and identification report will appear if available.

Repository of Reports for Tracking & Trending

- **Bacteria by All Traits** – displays the proportion (%) of bacterial samples, submitted over a specified period of time, that have a given Gram reaction, morphology, and spore-forming capability. Spore-forming capability will be categorized as “yes” for spore-formers or “no” for non-spore forming bacteria. The date range can be modified by clicking on the Options icon.
- **Bacteria by Gram Reaction** – displays the proportion (%) of bacterial samples, submitted over a specified period of time, that are Gram positive, Gram negative, or Gram variable. The date range can be modified by clicking on the Options icon.
- **Bacteria by Gram Reaction & Morphology** – displays the proportion (%) of bacterial samples, submitted over a specified period of time, that are Gram positive cocci, Gram negative rods, etc. The date range can be modified by clicking on the Options icon.
- **Bacteria by Morphology** – displays the proportion (%) of bacterial samples, submitted over a specified period of time, that are rods, cocci, etc. The date range can be modified by clicking on the Options icon.
- **FOO (Frequently Occurring Organisms)** – displays a bar graph of the most frequently identified species over a specified period of time. The date range, organism type (bacteria, filamentous fungi, etc.), and limit of species to display can be modified by clicking on the Options icon.
- **Microflora by Genus** – displays a list of the most frequently identified genera over a specified period of time along with the number of identifications reported and the organism type (bacteria, filamentous fungi, etc.). The date range and organism type can be modified by clicking on the Options icon.
- **Microflora by Species** – displays a list of the most frequently identified species over a specified period of time along with the number of identifications reported and the organism type (bacteria, filamentous fungi, etc.). The date range and organism type can be modified by clicking on the Options icon.
- **Organisms over Time Report** – displays a line graph of the number of identifications reported for up to three user-defined species over a specified period of time. Upon selecting this report, the user will be prompted to enter the date range and the species to be displayed. The “Species” fields perform a “contains-type” search which allows the user to enter any part of an organism’s name. Any of the inputs can be modified subsequently by clicking on the Options icon.
- **Organisms by Type Report** – displays the proportion (%) of samples, submitted over a specified period of time, that are bacteria, filamentous fungi, or yeasts. The date range and organism types to be compared can be modified by clicking on the Options icon.
- **Sample Data Export** – allows the user to enter any combination of Input Controls which include a date range, organism type (bacteria, filamentous fungi, yeast, etc.), cell morphology (rods, cocci, etc.), Gram reaction, sample name (also referred to as the Sample ID that was specified on the request form or web portal upon submission of the sample), and whether or not the sample was a spore former.
- **New Organisms Not Seen Previously** – customers can view new organisms that have been identified in their facility within the past 90 days.
- **Comparison of Organisms over Time** - customers can compare recovery of a specific organism over two selected time periods
- **Customer Dashboard** - allows customers to see useful sample metrics over the past three months.
- **Comparison of FOO Over Time** - allows customers to select different time periods to compare their FOO

Exporting Data for Tracking & Trending

The data displayed in the resulting reports can be exported from the Customer Web Portal by clicking the **Export** icon. The data can be exported in any of the listed formats (Excel, CSV, etc.). ***Charles River can only ensure data integrity up to the point of exporting from the customer web portal.***

Information present for Tracking & Trending purposes is drawn from the naming convention applied to samples by the Customer and the identifications directly resulting from processing performed by Charles River. For individual sample identifications, please refer to the original ID Report generated.

The auxiliary data associated with our species library entries (e.g., cell morphology, Gram reaction) was obtained from the primary literature, when possible, or from reference material such as the *International Journal of Systematic and Evolutionary Microbiology*, *Bergey’s Manual of Systematic Bacteriology*, or The Centraalbureau voor Schimmelcultures (CBS) Fungal Biodiversity Centre, for example, and may not reflect testing conducted by Charles River.

For any given trait, the database may report Other, N/A, or Unknown as described below:

- *Other* is reported if the organism displays an uncommon manifestation of a trait that is not displayed routinely enough to warrant its own category.
- *Unknown* is reported for organisms for which definitive information about the trait could not be determined from a reputable source.
- *N/A* may be reported if the information about the trait has not yet been added to the database for the organism.

All Tracking & Trending data reported in the Customer Web Portal are for informational purposes only. For an individual sample identification, please use the “View C# Reports” icon on the home screen.

Tutorials – Training Modules

- **Creating an Accugenix Customer Web Portal Account**
- **Finding Your Account Number**
- **Adding a New User to an Account**
- **Changing Your Password**
- **Viewing Your Current Pricing**
- **Changing Authority Level**
- **Customizing Tracking and Trending Metadata**
- **Creating an Identification Request Form With Metadata**
- **Sending Your Samples – Global Locations**
- **Inactivity Notification**
- **Tracking and Trending Overview**
- **Creating an Organisms of Interest List**
- **Creating an Audit Trail Report**