



UKNEQAS IN CLINICAL CYTOGENETICS

1 INTRODUCTION

This document gives a brief overview of the Harmonica web-based product as customised for use by UKNEQAS in quality schemes for clinical cytogenetics. It is intended for use by laboratory staff responsible for EQA submissions under these schemes.

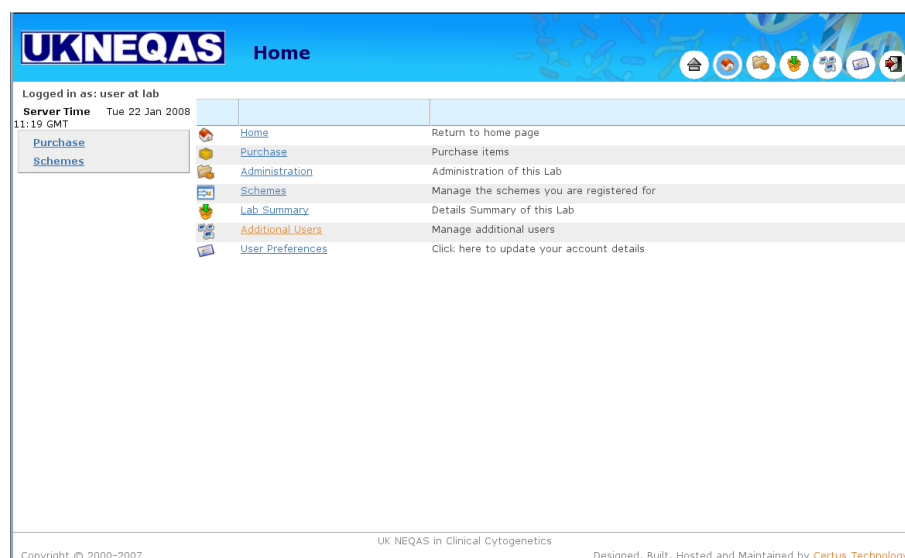
2 BASICS

The system can be accessed from a web browser using the URL <http://www.ccneqas.org.uk/ccneqasfo/>.

When your application for membership was accepted, an user account will have been created with all permissions necessary to manage your laboratory's access to the system. You will have selected a user name at the time you applied for membership; you will then have been emailed a password. In case of doubt, contact the scheme organiser.

First log into the system using your allocated user name and password. This will take you to the ccneqas home page:

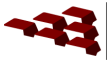
Home page, showing menu icons



2.1 A NOTE ON NAVIGATION

Administrative menu options appear as icons to the top right of each screen. The main EQA menu items (*Purchase* and *Schemes*) appear at the head of the left hand column of the page. For the sake of clarity, a menu option is only displayed if you have permission to use at least some of the functionality provided by it.

At any time you may use the menu items to move to the appropriate system component. If you do this having made changes on a page, these changes will



be lost - it is equivalent to leaving the page using the *Cancel* option (see below).

Within a page, sub-menus appear in the left hand column. Once again, these can be used at any time to move to the associated page.

The system is a web-based database system. Entering data on a web page will not update the database until a *Save* action is initiated. This is done using buttons. It is common to initiate a save when leaving a page, but this is not always the case. There are three basic buttons used on pages:

Save

Initiate a database save and leave the current page.

Apply

Initiate a database save but stay on the current page, which will be refreshed.

Cancel

Leave the current page without initiating a database save.

The *Apply* option is particularly important when creating new objects in the system. A refreshed page in these circumstances may contain more options than previously.

2.2 THE HOME PAGE



You can return to the home page at any time using this icon.

2.3 YOUR OWN ACCOUNT PREFERENCES



From this page you can manage your own account details. Two submenus will appear in the left margin of the page:

Change Account

You will be able to change your account details, such as your email address. You will also be able to set the number of table rows which appear in listings for all pages.

Change Password

It is recommended that you change your password regularly. It is possible for CCNEQAS to enforce periodic password change, but this feature is currently not activated.

2.4 LOGGING OUT





You can log out from the system at any time using this icon.

3 **ADMINISTRATION**

Users with administration rights can access a number of administrative functions, including purchasing of EQA schemes, creating new users and changing laboratory registration details.

3.1 **ADDITIONAL USERS**



Initially, you will have been invited to give the details of up to two users of the system for your laboratory. The associated user accounts are usually created with administration rights - including the right to raise a purchase order for an EQA. For a small sum you may purchase the ability to create further accounts. By default, these extra accounts will allow the users to view past submissions for an EQA and submit documents for an EQA - but not, for example, to perform purchasing actions.

3.2 **LABORATORY REGISTRATION DETAILS**



The details you gave when registering for CCNEQAS are available (and editable) on this page, together with the laboratory number allocated to you. You are particularly requested to keep your contact information up to date.

3.3 **ORDERS AND INVOICING**



As a member of CCNEQAS you can purchase membership of any available EQA scheme. In this administrative component you can manage orders, invoicing and your account ledger.

3.4 **PURCHASING EQA SCHEMES**

The *Purchase* menu item is found at the head of the left hand column of each page. Each available scheme has a registration period defined, and can only be purchased during that period. Hence, only schemes which you have not already purchased and which currently have an open registration will be listed.

The purchasing screen allows you to place an order for any open scheme:



Listing schemes available for purchase

UKNEQAS Lab Purchasing

Logged in as: user at lab
Server Time Tue 22 Jan 2008 11:51 GMT

Information
Use this page to register for EQA schemes and make other purchases. Please remember to press Complete when you have selected all the items you require.

Purchase Schemes

CCNEQAS schemes	Name	Description	Price
Register	UB12008	UB12008	GBP310.00

If you choose to purchase (register for) the scheme, then a registration screen appears:

Purchasing a scheme

UKNEQAS Lab Purchasing

Logged in as: user at lab
Server Time Tue 22 Jan 2008 11:52 GMT

Information
Please remember to press Complete when you have selected all the items you require.

Purchase Schemes

CCNEQAS schemes	Name	Description	Price

Summary of Current Sale

Your Purchase Order Number	
Total (Ex VAT)	GBP310.00
Total Tax	GBP0.00
Total (Inc VAT)	GBP310.00

	Quantity	Name	Unit Price	Tax	Total
Remove	1	UB12008	GBP310.00	GBP0.00	GBP310.00

Complete Set PO Number

You may then set a PO number and complete the purchase order. The purchase order will be raised in the CCNEQAS office system. Once accepted, you will be able to participate in the chosen EQA scheme(s).

4 SCHEME PARTICIPATION

The *Schemes* menu item is also found at the head of the left hand column of each page. This will take you to a summary page where you can see the status of each scheme for which you have registered:

Schemes page, showing status of each

UKNEQAS Scheme Reports

Logged in as: user at lab
Server Time Tue 22 Jan 2008 12:03 GMT

Search
Name: Scheme Season: [2008 Spring] Search View Laboratory Documents

EQA Schemes

This is a list of all the schemes your lab has registered for. **Please note:**

- Activities due for completion are shown in green. Future activities are shown in red.
- If you have recently registered for a scheme and it is not in the list, then your registration is awaiting approval.
- Click on 'Details' to view the scheme details and upload your reports.
- View schemes you have registered for in other years by selecting a different season above, and pressing the 'Search' button.

Found 2 Records.

Name	Registration Approved	Next Activity For Completion (From-To)	Season
Details Blood EQA 2008	02 Sep 2007 - ---		2008 Spring
Details MDS EQA 2008	02 Sep 2007 - ---	10/02/2008 00:00 - 26/03/2008 00:00	2008 Spring

When table listings appear on a page, it is frequently the case that not all items are to be listed. For example, we may only be interested in schemes for the season Spring 2008. In this case, a filter can be applied. This is done in the search box at the head of the page: in this case we have filtered on scheme season.

Each scheme satisfying the search filters (if any) will be listed. For each, the



dates of the next activity for the lab will be highlighted. In the example, the MDS EQA has an activity starting on the 10th February 2008. The Blood EQA has no upcoming activities for the lab. In either case, the link in the first column allows scheme details to be viewed. If we inspect the details of the MDS EQA we find the following:

Schemes detail, showing activities

The screenshot shows the 'Scheme Reports' page for UKNEQAS. It is logged in as 'user at lab' on Tue 22 Jan 2008 at 13:05 GMT. The page displays details for the 'MDS EQA 2008' scheme, which started on 03 Sep 2007. Under 'Activities for MDS EQA 2008', there are three activities: 'Registration' (closed, 01/01/2008 00:00 - 21/01/2008 00:00), 'Upload case information' (open, 22/01/2008 00:00 - 26/03/2008 00:00, 63 Days Left), and 'Final ILR available' (future, 01/04/2008 23:00 - 18/04/2008 23:00, Dates not finalised). Below this, 'Scheme Documents' are listed, including 'Summary report available to participants' (Dates not finalised) and 'Summary letter available to participants' (01/04/2008 23:00 - 14/04/2008 23:00). A document 'MDS2007 UKNEQAS_Instructions.pdf (v1.0 - 24.06 KB)' is also shown, uploaded on 03/09/2007 10:48.

The information is of two types: scheme activities and scheme documents.

4.1 SCHEME ACTIVITIES

Activities undertaken by the lab within the scheme are listed, together with their dates. Colour coding is used to highlight an activity's status: red for a closed activity (one completed in the past); green for an open (ongoing) activity - for which the number of days left is highlighted as well as the relevant dates; and yellow for a future (upcoming) activity. A lab can only engage with open activities: in this example the upload of case information. This is done by following the link in the name column of the listing. In this case, the link will take you to a form upload activity page:

A form submission activity

The screenshot shows the 'Activity Details' page for the 'MDS EQA 2008' scheme, specifically for the 'Upload case information' activity. The activity is open, starting on 22/01/2008 00:00 and ending on 26/03/2008 00:00, with 63 days left. The description states: 'Upload one form for each case. Additional attachments can be added to each case. You will receive an email notification of a successful upload.' Below the description, there are 'Files' and 'MDS Case Submissions' sections. The 'MDS Case Submissions' section shows two cases, each with a 'Download the case template, fill in and upload' button and an 'Additional Attachments' section for uploading clinical reports/documentation.



This page shows that the activity involves uploading two cases, each with (optional) attachments. The first case is shown with a green dot, indicating that a form has already been uploaded for that case. The second case is shown with a red dot: no form has yet been uploaded. In neither case has any attachment yet been uploaded.

Forms are in RTF, so you will need a tool (such as Open Office or Microsoft Word) which can handle RTF. The tool you choose should support RTF bookmarks and form field locking.

to download a form

Click on the form icon, to the right of the coloured dot. Choose to download a form. If the icon is green, then you can download the form as you last uploaded it; if red, you can only download a form which is automatically filled in with scheme details and your lab number. Save the form on your computer and use your word processor to complete it.

to upload a form

Again click on the form icon, to the right of the coloured dot. Browse for the file on your computer's file system and choose to upload the file. The system will check that you are uploading a valid form for that scheme and case.



to add an attachment

Click on the icon to add an additional attachment. Once uploaded, the attachment will be listed. Alongside each attachment is a red cross: if you mistakenly upload the wrong attachment then click on this cross to remove it.

Forms will vary according to the details of the scheme, but a typical example is shown below:



Example (RTF) form for case submission

 for Clinical Cytogenetics		 Registered EQA Scheme Reference No: 006		Laboratory No. 8000	
		EQA		MDS Scheme	
		Year		2008 Spring	
RETROSPECTIVE					
EQA-Case Submission Form					
<i>Fill in this form with details of the cases you are submitting to the EQA. Use one form for each case submitted.</i>					
A. Referral details					
Case Number:	1	Date of Birth:		Sex:	Unknown
Sample Type:		Date Received:		Days to report:	
Referral Reason:					
Additional Information:					
B. Results					
Your Results:					
Laboratory Comments: (include details of probe(s) or primers used)					
C. How you obtained the results					
		Preliminary result (if applicable)		Final result	
Total No. of metaphases/interphases examined					
No. of cells counted, scored or partially analysed					
No. of metaphases fully analysed					
Banding Quality Score					
D. Method used (preliminary result obtained through)					
FSH:	<input type="checkbox"/>	QF-PCR:	<input type="checkbox"/>	RT-PCR:	<input type="checkbox"/>
MLPA:	<input type="checkbox"/>	Chromosome analysis:	<input type="checkbox"/>		
<small>EQA Retrospective Submission: Copyright 2007</small>		<small>Page 1 of 1</small>		<small>Report generated 28/05/08 00</small>	

4.2 SCHEME DOCUMENTS

Scheme documents are made available in two forms: those made available according to a timetable, for example the results of a scheme; and those which are always available, such as instructions to labs about participating in the scheme. Timetabled documents appear first, as making them available is considered to be a form of scheme activity. Colour coding is as for scheme activities.