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Introduction to ClientConnect

ClientConnect is a web portal which can be used to access information related to submitted samples. When using ClientConnect you can check sample analysis status, download data, and review methodologies.

This document is intended to help with the use of the ClientConnect web portal. It is written in a way that assumes that you have already established specific project parameters with the laboratory or Project Manager. The information provided in this document is meant as a quick overview of the features found in ClientConnect.

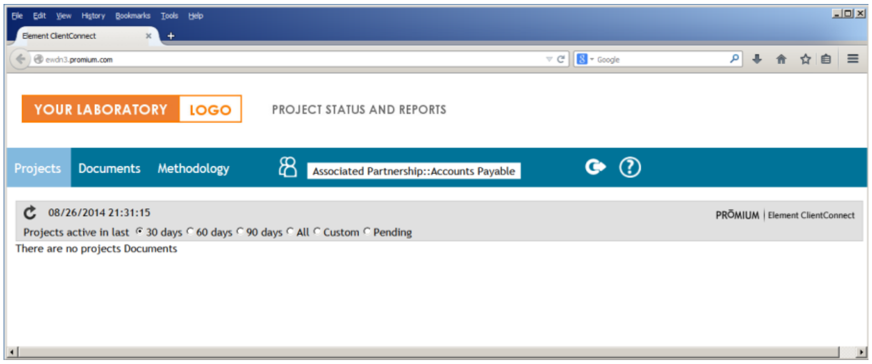
Login

On the login page, enter the user name and password that have been provided by the laboratory.

ClientConnect Login page

Main Page

Once logged in there are three main views in the banner located at the top of the page. The choices are Project, Documents, and Methodology.

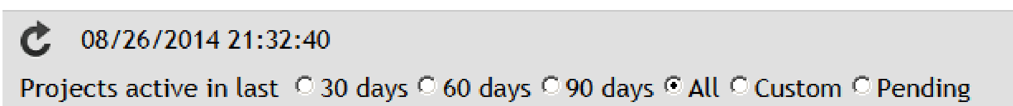


ClientConnect main page

Filters

Records can be filtered by date ranges and by keywords.

The list of Projects that appear can be limited by applying date ranges to show only select datasets. A filter can first be applied to determine the amount of data to return.

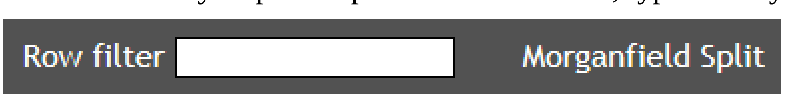


Project page, Navigational ranges

Navigational ranges that can be applied are:

- **Active:** Displays any project that has had a work order received within the time specified through the filter (30, 60, or 90 days).
- **All:** Displays all Projects—does not take individual Work Order dates into account.
- **Pending:** Displays work from Projects which have no Work Orders posted. Pending work will also appear when 'All' is selected.
- **Custom:** Customize the date range of received Work Orders in place of using the default 30, 60, or 90 day options

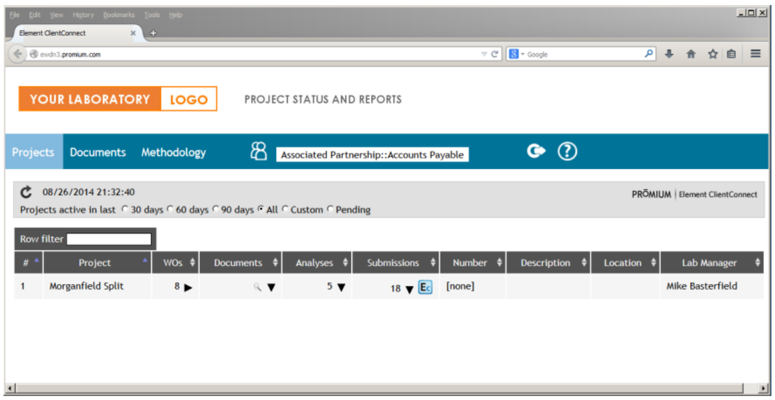
To filter rows by a specific piece of information, type the keyword(s) into the Row Filter field.



Project page, Row filter

Projects

The projects page displays a summary of all projects associated with the user account that is logged in. The page lists each project in a row that includes summary information for that project.



Project page

The Project grid contains the following columns:

- **#:** The sequential number assigned to each row
- **Project:** The client project name.
- **WOs:** The number of work orders related to the project. Can expand to view the specific work orders and information related to them.
- **Documents:** Shows documents associated with the project. Can expand to view any documents that exist.
- **Analyses:** Analyses associated with project. Can expand to view the list.
- **Number:** The default Project number associated with the project.
- **Description:** The Project description.
- **Location:** The Project location.
- **Lab Manager:** The laboratory project manager assigned to the project.

Accessing Data

On the Projects page datasets can be expanded for detailed viewing of information related to Work Orders, Documents, Analyses, and Submissions.

#	Project	WOs	Documents	Analyses
1	Morganfield Split	2 ▶	1 ▼	2 ▲

Project page, Arrow icons

There are three types of arrow icons that can exist in the data row; right, down, and up. Clicking on the right arrow in the WOs column will open the Work Orders grid. Clicking on the down arrow will expand and provide additional information through a secondary grid underneath the project data grid. Clicking on the up arrow will collapse the expanded information.

In the column header there exists up/down arrows that can be used to sort the data rows in either ascending or descending order.

Projects Work Orders (WOs) Grid

When the Work Order grid has been opened from the Projects page, information related to individual work orders associated with the project can be seen. To return to the main Project page, click on 'Projects' in the page's main banner. This information on the Work Order grid can also be expanded to provide details related to samples, analytical results, and documents.

☐	WO #	Samples	Results	Documents	Project Number	Status	Sampled Date	Received Date	Status Date
☐	P507007	1 ▼	▼	▼	South Treatment Plant	Received	07/22/2015	07/23/2015	07/23/2015
☐	P507008	1 ▼	▼	▼	Pumping Station 01	Received	07/20/2015	07/23/2015	07/23/2015

Project page, expanded Work Order view

The Work Orders grid contains the following fields:

- **WO #:** The work order number assigned by the laboratory.
- **Samples:** The number of samples in the work order. Can expand to show details.
- **Results:** An arrow will appear if results are available for viewing. Can expand to show details.
- **Documents:** Documents associated with the work order. Can expand to show details.
- **Project Number:** The project number that is associated with the work order.
- **Status:** Current Status of the work order.
- **Sampled Date:** The minimum sampled date of samples associated with the work order.
- **Received Date:** The date that the samples were received at the laboratory.
- **Status Date:** The date that the status was last changed

Work Order Samples menu

When the Samples menu has been expanded from the WOs grid, information related to individual samples can be seen.

	Sample	Matrix	Sampled	Received	Analysis	Status	Status Date
	01-MW-1	Water	07/22/2015	07/23/2015	608 Pest/PCB	Received	07/23/2015
					BTEX	Reviewed	07/23/2015

Expanded Work Order page, expanded Sample view

The Sample grid contains the following fields:

- **Sample:** The sample name provided to the laboratory (the Client sample name)
- **Matrix:** The sample matrix
- **Sampled:** Date the sample was collected
- **Received:** Date the sample was received by the laboratory
- **Analysis:** Specific analysis performed on the sample
- **Status:** Current Status of the analysis
- **Status Date:** The date that the status was last changed

There will be information provided for each analysis contained within a Work Order. The information presented can be exported to an xls spreadsheet file by clicking on the Export icon that appears in the first column header.

To close the expanded menu, select the arrow icon located in the Samples column, next to the number of samples in the Work Order.

Work Order Results menu

When the Results menu has been expanded from the WOs grid, information related to individual sample analysis results can be seen. This can be opened either at the same time that the Sample column information is expanded, or independently. When the Results and Sample menus are both opened concurrently, they will open as two separate tables.

	Sample	Analysis	Matrix	Analyte	Units	Rep Limit	Result	Qualifiers
	03-MW-3	BTEX	Water	Benzene	ug/L	0.700	45.0	D-02
	03-MW-3	BTEX	Water	Ethylbenzene	ug/L	0.700	ND	
	03-MW-3	BTEX	Water	Toluene	ug/L	0.700	1.00	J
	03-MW-3	BTEX	Water	Xylenes (total)	ug/L	0.700	ND	

Expanded Work Order page, expanded Results view

The expanded Results grid contains the following fields:

- **Sample:** Sample name provided to the laboratory (the Client sample name).
- **Analysis:** The analysis name used by the laboratory.
- **Matrix:** The sample matrix.
- **Analyte:** The analyte of interest in the sample provided.
- **Units:** The units associate with the result and reporting limit.
- **Rep Limit:** The Reporting Limit .
- **Result:** The analytical result. Values above the reporting limit will be highlighted in yellow.
- **Qualifiers:** Laboratory qualifiers that have been associated with the analyte. To view the text of the qualifier, hover the mouse over the qualifier abbreviation.

All information from the expanded menus can be exported to an xls spreadsheet file by clicking on the Export icon that appears in the first column header. To close the expanded menu, click on the arrow icon located in the Results column.

Work Order Documents menu

When the Documents menu has been expanded from the WOs grid, documents associated with the selected work order can be seen. They can then be opened or saved by clicking on the document name.

#	Project	WOs	Documents	Analyses	Submissions	Number	Description	Location	Lab Manager
1	Morganfield Split	8 ▶	1 ▲	5 ▼	18 ▼ Ec	[none]			Mike Basterfield

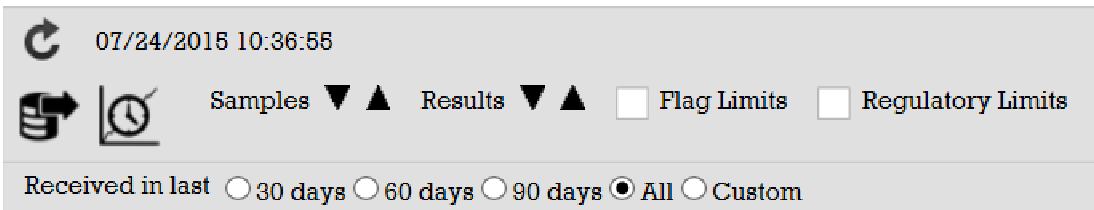
Name	Date	Size
Project Info.pdf	04/10/2014 00:00	42 KB

Work Order page, Documents expanded menu

The name of the document, date, and file size are shown in the expanded view.

Work Order options

When the Work Order menu has been expanded from the Projects page, the main banner of the page will show some options that are not available on the Project main page.



Work Order view options

Available options on the Work Order page are:

- **Refresh:** Clicking on the circular arrow will refresh the data on the page. The date and time of the last refresh are indicated next to the arrow.
- **Data Export:** Clicking on this icon will open a new page that allows the user to export data from ClientConnect to an .xls spreadsheet file. To export data from the Export page, select an export format from the drop-down menu. The choice list contains several default formats. A custom template can be created to include whatever available information is desired. To create a new export format:
    1. Click on the 'Add' icon located at the far left hand side of the page.
    2. Enter a name for the format and select 'OK'.
    3. Put a check in the data fields that should be included.
    4. Click on the + symbol to expand the table fields.
    5. Once the fields have been selected, click on the 'Save and run this export setup' icon located on the field selection screen.
- **Sample History:** Clicking on the Sample History icon will open a new page that allows the user to view the historical results from samples with the same name—for example, an effluent. The History view shows the Analysis, Analyte, Units, a graph representing the analytes on each date, and the sample results. Statistically values for the Min, Average, and Max will also be presented.
- **Samples Expand All:** This option will expand all samples contained in all the Work Orders.
- **Results Expand All:** This option will expand out all Results details for all samples in all of the Work Orders.
- **Flag / Regulatory Limits:** Putting a check in either of these boxes will show the limits if they have been set up by the laboratory. If the result is above the limit then name of the limit and its value will be highlighted in red.

	Sample	Analysis	Matrix	Analyte	Units	Rep Limit	Reg Limits	Result	Qualifiers
	03-MW-3	BTEX	Water	Benzene	ug/L	0.700 **Flag 1: 10**	**MTCA: 5.00**	45.0	D-02
	03-MW-3	BTEX	Water	Ethylbenzene	ug/L	0.700		ND	
	03-MW-3	BTEX	Water	Toluene	ug/L	0.700 Flag 1: 10		1.00	J
	03-MW-3	BTEX	Water	Xylenes (total)	ug/L	0.700		ND	

Work Order results page, flag and regulatory limits example

Projects Analysis Grid

Expansion of the Analysis column will identify analysis associated with the project.

#	Project	WOs	Documents	Analyses	Submissions	Number	Description	Location	Lab Manager
1	Morganfield Split	8 ▶	1 ▼	5 ▲	18 ▼	[none]			Mike Basterfield

Analysis
Arsenic, Total 200.7
Cyanide - Total
Lead, Total 200.7
VOA 8260_BTEX
Zinc, Total 200.7

Project page, Analysis expanded menu

Note: For more information on the Analysis, please go to the Methodology section of the website.

Documents

The Documents page summarizes documents associated with the user account that is logged in. From this page, documentation files can be opened or saved.

Row filter

Type	WO #	Project	Name	Date	Size
Client			Bid for New Project.pdf	04/25/2014 00:00	42 KB
Client			Client Secrets.pdf	04/04/2014 00:00	42 KB
Client			Project Proposal.pdf	05/19/2014 00:00	42 KB
Client			Quarterly Review 1Q2013.pdf	04/12/2014 00:00	42 KB
Client			Sammaches.pdf	05/01/2014 00:00	42 KB
Client			Summary of Work To Date 12312012.pdf	05/09/2014 00:00	42 KB
Invoice			1200001.pdf	04/10/2014 16:49	54 KB
Project		Morganfield Split	Project Info.pdf	04/10/2014 00:00	42 KB
Work Order	M310001	Morganfield Split	M310001.pdf	05/06/2014 00:00	21 KB
Work Order	M310004	Morganfield Split	M310004.pdf	05/06/2014 00:00	21 KB
Work Order	M310004	Morganfield Split	M310004_COC.zip	05/06/2014 00:00	21 KB

Documents page

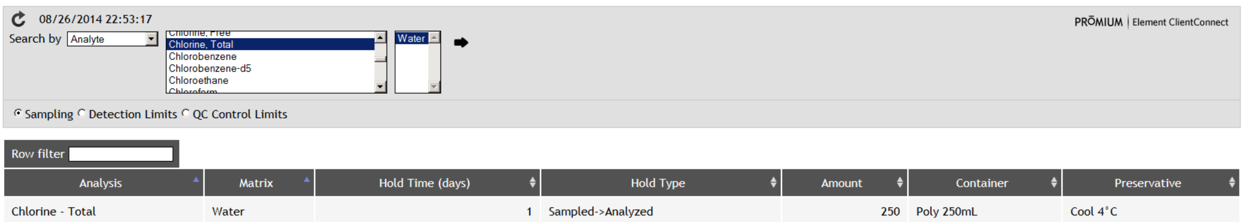
The Documents page contains the following information:

- **Type:** The document type.
- **WO#:** Work Order number, if applicable.
- **Project:** The associated Project, if applicable.
- **Name:** Document name.
- **Date:** Date that the document was generated.
- **Size:** Document size.

To download a document, click on the document name and a prompt will appear to open or save the file.

Methodology

Methodology is a cascading query page which shows the method parameters for an analytical test. The methodology can be queried by Analysis, Analyte, CAS #, General Method, and other choices.



Methodology page

Once a methodology has been identified, the Sampling information will be displayed on the page:

- **Analysis:** The analysis name
- **Matrix:** The analysis matrix
- **Hold Time (days):** The analysis holding time in terms of days
- **Hold Type:** The type of holding time, when it starts and when it stops (for example, Prepared to Analyzed)
- **Amount:** Recommended sample amount
- **Container:** Recommended container type
- **Preservative:** Recommended sample preservative, if applicable

Clicking on the radio button for Detection Limits will display the limits associated with each analyte. Clicking on the radio button for QC Control Limits will display the quality control limits associated with each analyte.