External User Guide for the Zoma Fungal Diagnostics Laboratory Information Management System (LIMS)

For ease of use, you can skip to the following sections as needed:

Registration

- From the website Home page (www.zomafungal.com), click the link "Client Registration" (Figure 1).

Figure 1.

- Complete the required details. (Figure 2).

Submission of this registration form will generate an acknowledgement screen and an **email** notifying you that your registration is pending approval and assigning you a unique **Client ID** for your centre or institution (hereby referred to as the Client).

Please check your junk folder if you do not receive this email.

Approve emails from info@zomafungal.com to avoid this happening in the future.
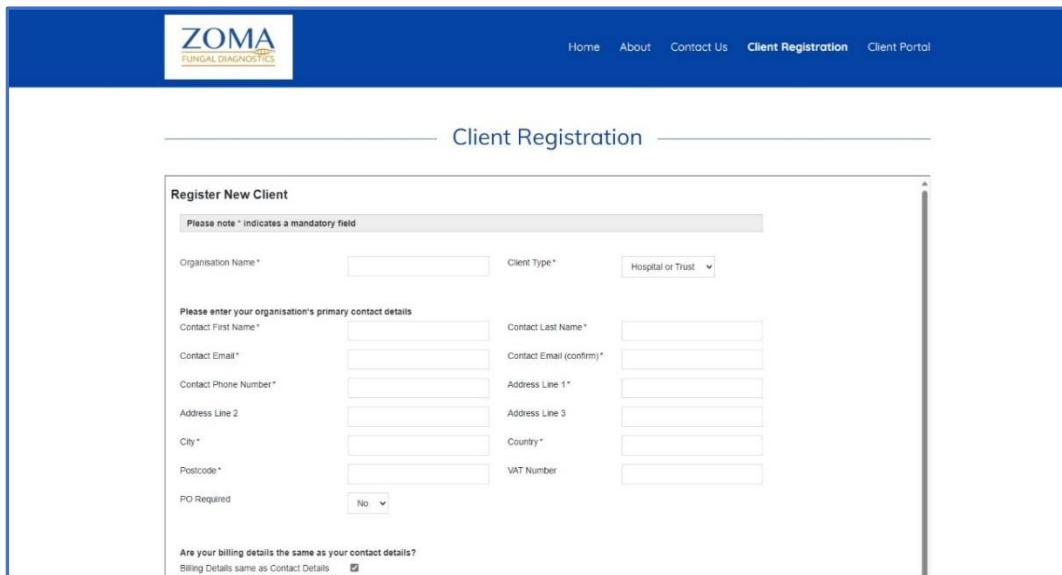
Figure 2.

Once your registration has been approved you will receive an email confirmation which contains your unique **User ID** (hereby referred to as the User, this is the individual who is submitting samples/ viewing results on behalf of the Client).

- **Use the link and instructions provided in this email to set your password for the first time.**

- **You will need to enter your registered email address and unique User ID.**

This will generate a password reset email to your account. Please use the link in this email to create or change your password. This unique, secure link will expire after **2 hours**. If you are unable to receive emails from Zoma Fungal Diagnostics Ltd. Please contact us and we will assist you in setting up a password without email verification.

Once you have set your own personal password you will receive an email confirming the changes to your account and can then use the link provided in the email to access sample submission and results via the **Client Portal**.

- You can now also use the Client Portal Link (Figure 3) on the website (www.zomafungal.com).

- You can also use the web address clientportal.zomafungal.com in your browser to go to the portal.

Figure 3.

Admin Users

The first User registration from a Client is automatically assigned as the Administrator (Admin) for that Client. Admins can manually add, remove, and manage other Users to the Client account from their personal log in page. See **Add/Manage Users (Admin Only)** for more guidance.

Client Portal

Once you have entered the **Client Portal** using your email and password, use the toolbar at the top to navigate to each functional section (Figure 4; Red). There is a description of each functional option listed below the menu on the LIMS Home page (Figure 4; Arrow).
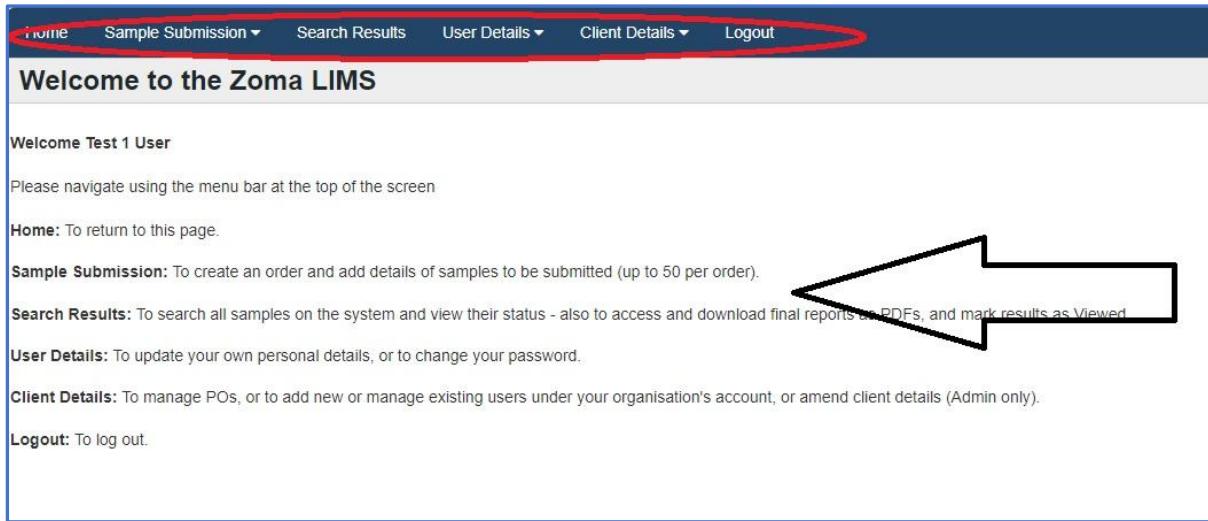

Figure 4.

Some functional sections have drop down menus which appear when you hover over them and allow quick access to other functions of the portal. Selecting Home from the top menu will always bring you back to this front page.

Sample Submission

- When you hover over the **Sample Submission** tab, it turns orange, and a drop-down menu appears with options to **Create New Order** or **Edit Sample Details** (Figure 5; Red).
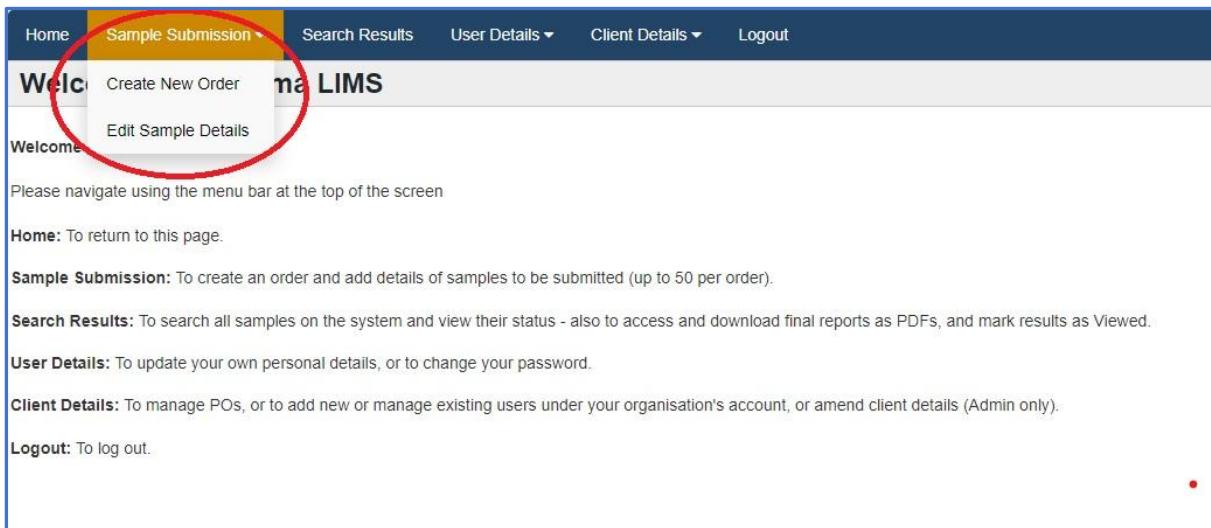

Figure 5.

- **To submit a sample, or a series of samples, click Create New Order** (Figure 6). The **Create New Order** page should have the Client name at the top (Figure 6; Red).

- **Use the drop-down menu to select the number of samples your wish to submit** (Figure 6; Green). You can submit up to 50 samples per order.
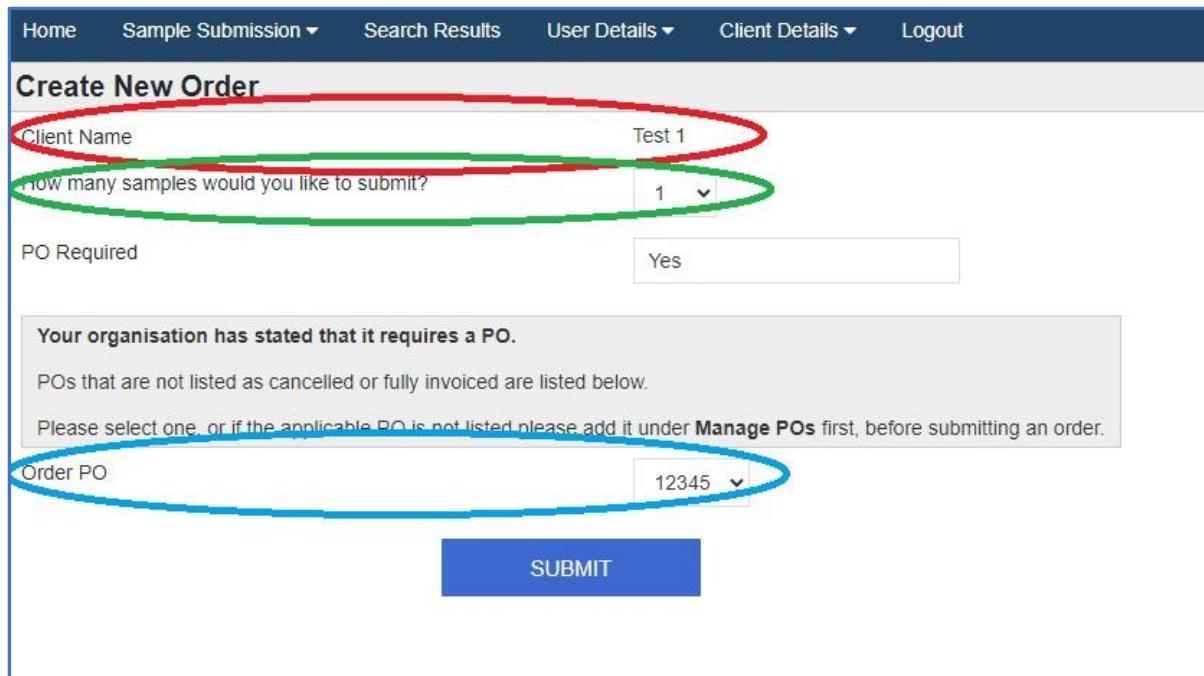
Figure 6.

- If the Client requires a Purchase Order (PO) number, then you will also see a drop-down menu (beneath the grey message box) where you can select active PO numbers registered to the Client (Figure 6; Blue). It should default to the most recent PO. If the PO number you want to use is not visible, please go to "**Manage PO Numbers**" under the Client Details tab on the top menu and add the required details.

- Click when you are ready to enter the sample information.

- You will be redirected to the "**Edit Sample Details** page where you can input the required information for each sample (Figure 7). A new order number will have been created against the date (Figure 7; Red). This order number can be used to group and track the samples entered against it.

Figure 7.

- Select [+] next to the new order you are creating.

This will allow you to see all the samples which make up the new Sample Order (Figure 8; Red). The orders are listed in ascending order of creation from newest to oldest, and the sample numbers in each order are listed in numerical order.

- Select [✎ Edit] on the right of the row to add the required information for each sample (Figure 8; Green).

Please note: To ensure compliance with ISO15189:2022, users must provide at least 2 unique identifiers for each specimen, these must be present on the specimen.

If the specimen does not have these identifiers, the specimen will be rejected and not tested.

Figure 8.

- Using the tab key, move through the completion of the sample submission information.

- Select the first information box "Sample Collection Date" (Figure 9; Red)

You can either type the date of sample collection in the format DD/MM/YYYY or use the Calendar symbol to select the date using the pop-up calendar.

- Next, enter your unique sample identifier in "Sample Reference" (Figure 9; Green).

This is an essential requirement, and you will be unable to submit the sample without it. This can be a laboratory specimen number, hospital, or NHS number but it will be the way that you identify each sample once reports are generated. **Please note: This MUST be present on the submitted specimen.**

- Next, enter a second unique sample identifier (Figure 9; Blue).

We suggest the use of "Date of Birth", but you can use any other identifier which is present on the sample. **Please note: This second identifier MUST be present on the specimen.**

There is a third identifier box for an "Additional Reference" which can be NHS number, hospital number. This does not have to be present on the submitted specimen so could be anything which will help you identify the specimen and its corresponding records in your own systems.

The text "incomplete" will be present on the left-hand side of the window until all mandatory fields are completed. You will be unable to submit specimens for testing without providing the required information.

- Next, enter the "Sample Type" using the drop-down menu (Figure 9; Purple).

All sample types accepted for testing are listed in this drop-down menu. **This is a mandatory field for each sample.**

- Next, enter "Sample Anatomical Site", using the drop-down menu to select the anatomical site of the submitted sample if known. (Figure 9; Orange).

This menu is altered by the selection made at "**Sample Type**".

This is a mandatory field for each sample as it can be a critical piece of information in the interpretation of results. If the anatomical site is not stated, please select Unknown.

- Next, enter any clinically relevant information for the sample in the "Clinical Details" box (Figure 9; Yellow.

This is a free text box for you to add any additional information which might be relevant to testing, such as **animal contact, travel,** and **occupation**. This is not a mandatory field. However, clinical details can be essential in the accurate interpretation of results, and we would encourage you to provide as much relevant information as possible. Please note: "Query fungal infection" is NOT a relevant clinical detail.

- Once all the required sample information has been entered, click [UPDATE] to complete the sample detail submission.

If you have not provided 2 unique specimen identifiers at this stage, "incomplete" will remain on the screen and you will be unable to submit your specimen processing request.

- Repeat this process for all samples in the order.
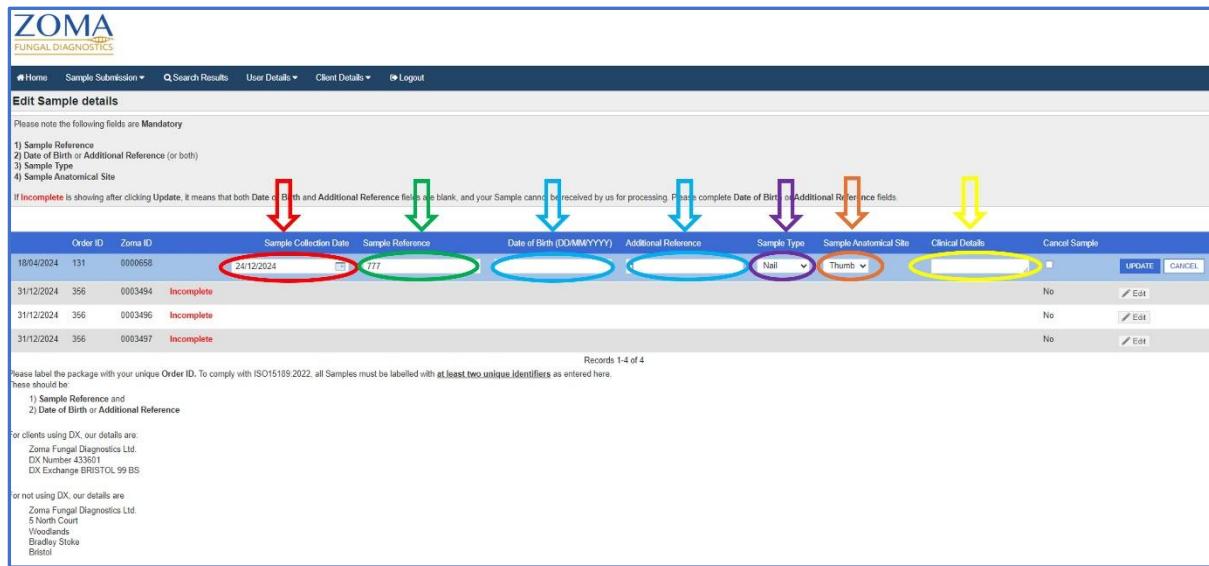
Figure 9.

- When all the required sample information for each sample in the order has been entered (Figure 10), you can either log out, return to the Home screen, or navigate elsewhere in the portal.

The samples submitted will remain visible in the "Edit Sample Details" window until they have been marked as received at Zoma Fungal Diagnostics Ltd. You can continue to add or edit additional information after samples have been dispatched. However, once samples have been marked as received, they are no longer available for editing and will no longer appear in this list.

- You are ready to send your samples for testing to the address below:

Zoma Fungal Diagnostics Ltd
5 North Court, The Courtyard
Woodlands
Bradley Stoke
Bristol
BS32 4NQ

If you are a client who uses **Hayes DX** service, you can send your samples to us using the following details:

<div align="center">

Zoma Fungal Diagnostics Ltd

DX Number: 433601

DX Exchange: BRISTOL 99 BS

</div>

For more information on how to send your samples to Zoma Fungal Diagnostics Ltd, please see the document "**How to Send Samples to Zoma**" (ZOMA.BENCH10) available from the website (www.zomafungal.com).

Figure 10.

View Sample Progress and Results

- Sample progress and status can be viewed under "Search Results" (Figure 11).
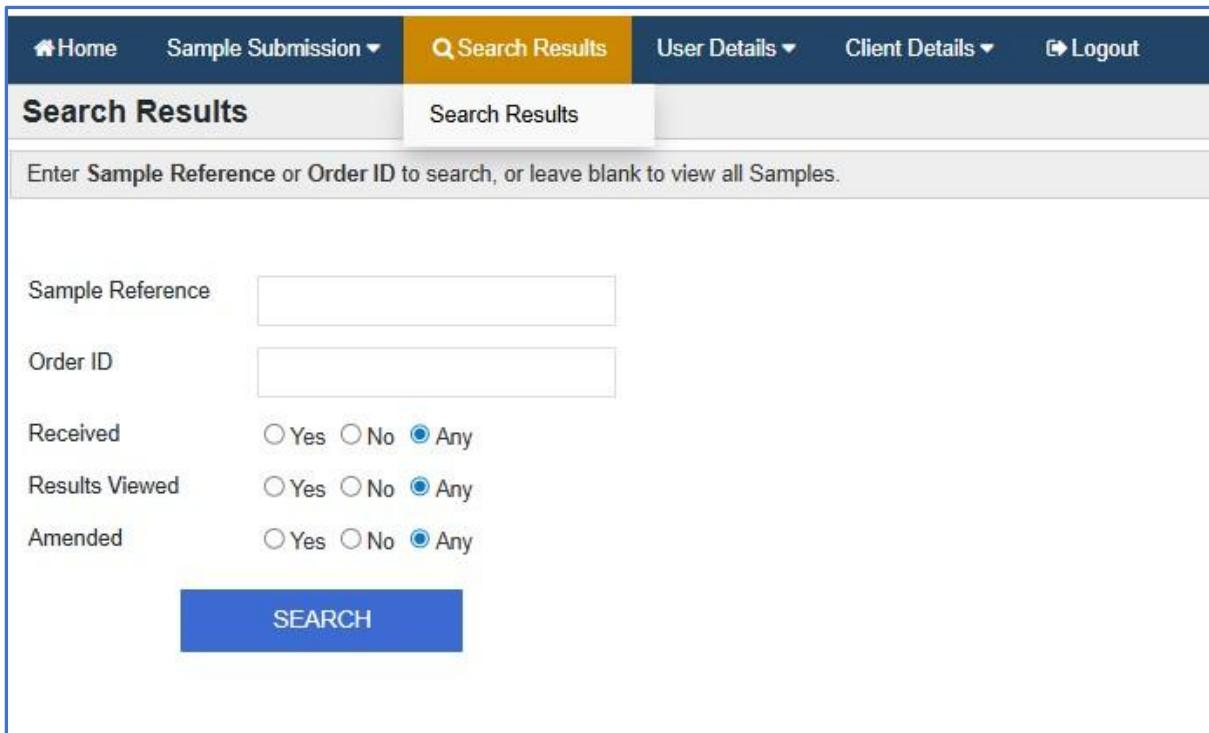
Figure 11.

- You should use your Sample Reference Number if you wish to view a specific sample, or the specific Order ID number to narrow search parameters to a small batch of samples (Figure 11). Click SEARCH to find the samples.

- Results can be filtered if needed by using the Yes/No/Any toggle buttons to select those results which are marked as received, viewed or amended.

For example, if you wish to only see those results which have not yet been viewed, set the search toggle to "No". If you only want to see results which have already been viewed, then set the toggle to "Yes".

If you do not enter any details, clicking SEARCH will allow you to view all samples submitted by your institution (**Client**), and their status. Therefore, if you are wanting to search all available results leave all toggle buttons on "Any".

Status of results and result reports can be viewed by any User who is registered with the Client.

- **To view the status and available results, click the Sample Reference number to open the available report** (Figure 12; Red).

Results can be sorted by several parameters using the drop-down box such as Order date, Results Viewed or Reference Number (Figure 12; Green). Status of each sample can be viewed in the columns next to each sample (Figure 12, Blue.

Figure 12.

- **All available results for that sample should be visible as shown in** Figure 13.

The report, along with all relevant information for the sample, can be viewed in this window (Figure 13).

- **Reports can be printed or downloaded as a PDF from the link at the top** (Figure 13; Red).

- **Reports can be marked as viewed by using the blue** MARK RESULT AS VIEWED **button at the bottom of the page** (Figure 13).

Once results have been marked as viewed, they will only be available via the search function. It is possible to adjust the search parameters to look for viewed reports only if you need to re-access them. All available reports will be accessible in this way regardless of status.

Figure 13.

User Details

Update My Details

This allows any user to change their name or deactivate their account. If your account is deactivated, you will no longer be able to access your account. If you wish to change your email address you must do this via your local Admin User.

Change Password

This link will open in a new tab and allow the User to change their password without an email verification process. You will need to know what your current password is. This tab can also be accessed using passwordchange.zomafungal.com .

If you do not know your password, and need to reset it, use the link displayed on the log on screen, or go to passwordreset.zomafungal.com . You will need the email address that you registered with and your unique User ID.

Client Details

Manage POs

This section allows for the entry and management of purchase order details which may be required by the Client. Enter the details as required using the same tab process as used for sample submission.

Add/Manage Users (Admin Only)

Admin users (the first registered user from a Client) can use this form to add other users from their centre to the system. It is the responsibility of the Admin to manage their user's accessibility. The number of users for a client centre is not limited but any users added in this manner will not have Admin privileges. If you require additional Admin users, you will need to contact Zoma Fungal Diagnostics Ltd Administration who can do this on your behalf.

New users only become active once the "Active" box is ticked in the "Account Active" column.

Each user is given a unique User ID, and this will be emailed to them so they can complete the set-up process by creating a personal unique password. This must be done before first use of the portal. Each sample submitted is logged against a User ID, so samples are fully traceable within your own User group.

Update / Amend Organisation Details (Admin only)

This section allows all the details of the organisation/ institution (Client) to be updated by the Admin user. This includes essential information such as billing details, contact names, and addresses.

Log Out

This tab allows the User to Log Out of the Zoma LIMS. We recommend all users log out when they have finished using the system for entering samples or viewing results.