



WebTrieve™ – Complete Training Guide

The portal is accessed from our website <https://alsolutions.alsglobal.com/>. Enter your username and password and click ‘Login’.

Registration	2
1) Creating the registration file for routine (non-shelf life) samples	2
2) Completing the registration file.....	2
3) Submitting Shelf Life Samples/Using Shelf Life Templates	3
4) How to Register Each Test Day Manually	3
5) What is a Shelf Life Template?.....	4
6) How to create a Shelf Life Template	4
7) How to register using a Shelf Life Template	4
Results Tracker	5
8) Viewing Results	5
9) Changing the Date Range / Applying Filters	5
10) Viewing By Pass/Warning/OOS.....	5
11) Exporting to Excel	5
12) Configuring the View	5
13) Checking Results	6
Dashboard	7
14) Report Settings	7
15) Detailed Search.....	7
16) Sample Activity	8
17) Results Trend.....	8
18) Test Status	8
19) Failed Tests Trend.....	9
20) Shelf Life	9
21) Nutritional Grid & Nutritional Templates	10
22) Nutritional Templates	10
23) My Reports	10
24) Downloads	10
Using My Account	11
25) Preference Settings	11
26) Changing your Password	11
27) Adding/Updating/Deleting Products and Suites.....	11
28) Default PO Numbers and Invoices	11
29) Viewing Invoices.....	12
30) Certificate Library.....	12
Label Printing from WEBTRIEVE	13

Should you require any assistance with WEBTRIEVE, please do not hesitate to contact our Client Services team
Email: ServiceAustralia@alsglobal.com Tel: 02 8832 7500 or 03 8756 8111



Registration

1) Creating the registration file for routine (non-shelf life) samples

- a) Under the Webtrieve banner, click on '**Registration**' and this will take you to the registration page.
- b) Please click on '**New Registration File**'
- c) Then click the '**Add New Sample**' Button - top left of the screen
- d) For samples with '**Sample Descriptions**' already held in the database, please type in any 3 letters from within the sample description required and a drop-down list should appear.

Only if your sample description is not listed, use one of these options:

- Do not enter anything in the registration page. Instead supply the following and ALS will enter it into the system on your behalf ready for the next submission:
 - Product ID
 - Suites/Tests required
 - Specifications for each test/analyte, including the reporting units, e.g. <10 cfu/gThis information can be provided as follows - [click here](#).

- e) Click on the relevant sample description and several fields should then automatically pre-populate with the default information. These settings can be changed if required or alternatively, add any additional information into the remaining fields e.g. Batch No, Line Number, Production date.
- f) Change the test suite to the relevant suite if different to the default. If any suites aren't listed on your site, please request through the '**Suite Request**' option on the registration menu. You can add up to 8 suites on the same sample.
- g) '**Sample Details**' is a free text field which allows you to add any additional information relating to the sample (e.g. batch number, date of manufacture) –

Note: this is NOT an instruction to the laboratory only additional information you wish to appear on the certificate – any additional tests requested using this field will NOT be carried out.

- h) The '**Product ID**' field in most cases is identical to the **Sample Description** field. This determines the specs which are applied to the samples – if this is not selected then results will appear as 'No Spec'. **DO NOT CHANGE THIS FIELD DURING SAMPLE REGISTRATION.**

Note: If submitting shelf life samples, see the later section regarding registering specs on shelf life trials.

- i) Once all the details are complete for that sample, click the green '**add**' sample button and a message will flash up to confirm that one sample has been added.
- j) Staying on that screen, you can then add further samples to the registration file by deleting the last sample description and typing in 3 letters of the next sample description, click on the sample required and then wait for the new default information to update and so on.
- k) Once all your samples have been added, click the green '**continue**' button. Your list of samples should then be added to your registration file.

If samples are for a priority turnaround, this must be pre-arranged with the laboratory.

Please see page 3 for notes on submitting Shelf Life samples.

2) Completing the registration file

- l) Within the registration file, click on the '**Actions**' at the end of each line to provide a menu to delete or edit the samples if required. Once you are happy with the list, either click the:
 - '**Save for Later**' button. Your registration file will now be in a '**saved**' status and can be completed and submitted later.



WebTrieve™ – Complete Training Guide

To edit the registration file, click on the **'Actions'** column drop-down list (from the registration page) and choose, **'Edit file'**.

- **'Submit File'** button. This will prompt for the **ALS site** and **Purchase Order number** to be defined. Complete these fields and click the **'Submit'** button. This confirms that the file has been sent directly to the appropriate sample receipt team, who will then register your samples and await their delivery. The status of the registration file will change to **'Registered'** with the number of samples against it.

- m) Once a file is successfully submitted, click on the **'Actions'** column drop-down list and click **'Print Consignment Sheet'**. ***This is to be included with the samples for every submission.*** This links the samples to the registration file when they arrive at our ALS site.
- n) There is also an option to print labels (this is optional). Again click on the **'Actions'** column drop-down list and click **'Print Labels'**. Select the correct configuration based on your label format and attach to the samples. ***Samples must be clearly and uniquely labelled.***
- o) The progress of each submission file can be monitored by reviewing the registration page. Each line will indicate how many of the registered tests have been completed and the results published. The status will change to 'complete' when all the tests have been completed.

If any amendments are required after a file has been submitted please contact the laboratory as soon as possible.

Email: ServiceAustralia@alsglobal.com Tel: 02 8832 7500 or 03 8756 8111

3) Submitting Shelf Life Samples/Using Shelf Life Templates

There are two ways in which you can submit shelf life samples:

- Manually register the product for each test day required
- Use a Shelf Life template

4) How to Register Each Test Day Manually

- a) Create a **'New Registration File'**
- b) Click **'Add New Sample'**
- c) Enter the product description and any additional information required

If you require the P+ day to appear on the certificate, you should enter this into the **'Sample Details'** field
- d) Ensure that the correct testing suite is selected
- e) DO NOT complete the **'Sample Date'** field
- f) If you require the sample to initially be tested on the day you are submitting the sample (e.g. day of receipt) then click **'Add'** – if not, move onto step g
- g) To enter the next test day, tick the **'Shelf Life box'**
- h) In the **'Schedule Date'** field, select the date you require the next set of testing to be carried out
- i) Update the P+ details in the **'Sample Details'** field and update the test suite if required
- j) Click **'Add'**
- k) Continue steps h-j for each date you require the product to be tested on
- l) You can then add further products, or click continue to show a list of all samples currently registered on that file.
- m) Complete the registration file by following the instructions in section 2 (above).



Should samples require a temperature movement or abuse, a suite is required for this instruction and will need to be included on the date that samples are to be moved. If these are not available on WEBTRIEVE – please contact Client Services and they will arrange for suites to be added for you – ServiceAustralia@alsglobal.com

5) What is a Shelf Life Template?

If you have a standard shelf life protocol you work to, a template can be created on WEBTRIEVE to make the registration process easier and more efficient. You can enter the sample details and select the relevant template; WEBTRIEVE will then enter each test day for that product.

6) How to create a Shelf Life Template

ADMIN USER access required.

In the My Account module on WEBTRIEVE, select Test Management, then Shelf Life Templates.

- a) Select **'New Shelf Life Template'**
- b) Give the template a name – e.g. JS Finished Product
- c) Enter the test day – this is the P+ day you require the sample testing on
- d) Enter the **'description'** (e.g. P+... and the storage instructions for the sample on that day) This is how it will appear on your sample certificate.
- e) Select the **'Suite'** required on that test day.

Note: If you choose a suite here – it will overwrite the suite assigned at registration.

Should samples require a temperature move or abuse, a suite is required for this instruction and will need to be included in the template on the day required. If these are not available on WEBTRIEVE – please contact Client Services and they will arrange for suites to be added for you – ServiceAustralia@alsglobal.com.

- f) Click add and then continue to add each test day of your protocol in the same way
- g) Click **'Save'** and your template is ready to use.

7) How to register using a Shelf Life Template

- a) Create a **'New Registration File'**
- b) Click **'Add New Sample'**
- c) Enter the product description as normal and enter additional information required in the **'Sample Details'** field.
- d) Tick the **'Shelf Life box'** on the registration form.
- e) DO NOT complete the **'Sample Date'** field.
- f) Select your required template from the drop down.
- g) Click **'Add Sample'**

All samples will then load into the registration file with the testing dates having been entered for you for each entry.

- h) Click **'Continue'**
- i) Complete the registration file by following the instructions in section 2 (above).



Results Tracker

8) Viewing Results

Results are displayed in the tracker once they have been **authorised** by the laboratory.

Results are listed as interim (with a blue flag) if the sample or certificate is awaiting further results. If the certificate is available to download, an Adobe symbol will be shown against the result.

Each line entry in the tracker is one test from that sample. If you click on the sample number, it will open a pop up window with all results available for that sample.

9) Changing the Date Range / Applying Filters

You can narrow down your search by changing the date range you are looking at. There is a drop-down menu which allows you to look at results for samples registered in the last:

- 1 Day
- 2 Days
- 7 Days
- 28 Days
- 3 Months
- Custom (this provides two date fields allowing you to search for results within this time period)

You can narrow down your search further by Applying Filters.

- Click **'Apply Filters'**
- A window will appear allowing you to enter details of the results you wish to look for. E.g. the sample description of 'Chocolate Cake'.
- Click **'Save Search'** or **'Add Filter'**
- WEBTRIEVE will then display the results for the parameters you have entered.



- All saved searches will be available for future use from

10) Viewing By Pass/Warning/OOS

WEBTRIEVE will give the total number of results (not samples) available for the date range/filters you are viewing results for.

Should you have specifications set up on our LIMS system, the summary table will also show you the number of results in that period which were a Pass/Warning/OOS/No Spec.

Should you wish to view just the OOS results for example, click on the number beside this in the table and WEBTRIEVE will update the table.

PASS *	201
WARNING	0
OOS	0
NO SPEC	754
TOTAL	955

11) Exporting to Excel

Should you wish to export the results you are viewing from the table in the Tracker, you can do so by clicking on the  Icon located to the top right hand side of the column headings.

12) Configuring the View

The view in the Tracker can be updated to suit you.

Re-Order: You can drag and drop the columns into an order you prefer – click on the column header and drag into the order you require them.

Sort: Columns can be re-sorted (by alphabetical or numerical order) by clicking on the column heading.

Add/Remove Columns: You can add or remove columns from the view in the tracker by clicking on the  icon. Then you simply tick/un-tick the columns you wish to be visible.



13) Checking Results

You can mark results as checked on the tracker once you have looked at them. You can also add a comment to any result e.g. if you have taken action upon an OOS result you could comment with your findings/corrective actions for easy reference when you look back at them in future.

In order to do this – you must have comments on WEBTRIEVE enabled (please client services for assistance if required).

At the far right of the table of results displayed in the tracker is a tick box.

a) Tick the results you wish to check / comment on

- If you tick more than one box and add a comment, this comment will be applied to all results ticked
- To select all results in the table to check/add comment to – click on the  cog icon and then choose **'Select All'**

b) Click on the  cog icon and then select **'Add Comment'**

c) A box will appear, from here you can:

- Add your comment and then click submit
- Add your comment and click Mark as Checked
- Simply mark the result as checked

d) You will then see, next to the sample number, a green circle. If you hover over the green circle, you will see who and when the result was marked and the comment which was made.



Dashboard

14) Report Settings

The 'Report Settings' tab allows you to set up real number conversions for all Excel downloads from the dashboard. The settings will default to 100% unless you alter them and save the settings.

Real Numbers

Real Number < conversion	<input type="text" value="100"/>	%
Real Number > conversion	<input type="text" value="100"/>	%
Real Num EST conversion	<input type="text" value="100"/>	%

From this you are also able to select the sample details you wish to be visible on your Excel reports. Your Excel reports will now have additional tabs on them:

- Report Summary
- Raw Data Download
- Real Numbers Download
- Test Summary
- Description Summary
- Sample Point Summary

Any settings you select and save will change those for all users in your organisation.

15) Detailed Search

The '**Detailed Search**' will allow you to select a certain set of data you wish to have represented in an Excel download.

Firstly select your search criteria.

You are able to add multiple sets of search criteria to apply to your report – select the 'Additional Filter' button.

Report Name (Optional)	<input type="text"/>	<input type="button" value="Run Report"/>
		<input type="button" value="Additional Filter +"/>

Give your report a name should you wish to and then select '**Run Report**'.

Your report will be available in the '**My Reports**' tab.



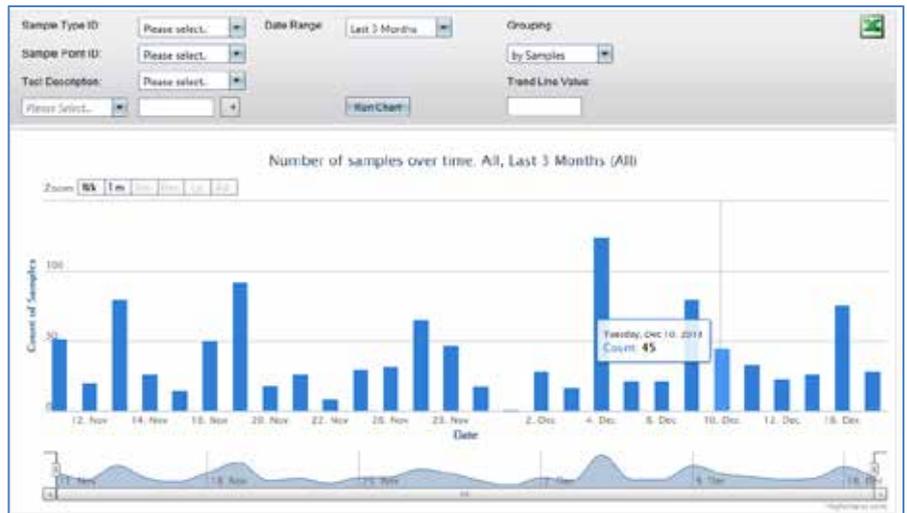
16) Sample Activity

Show the number of samples you have submitted over a selected period of time.

Narrow this down by sample type, test description or any additional field you will have entered at registration.

In order for the graph to run/update – you will need to select **'Run Chart'**.

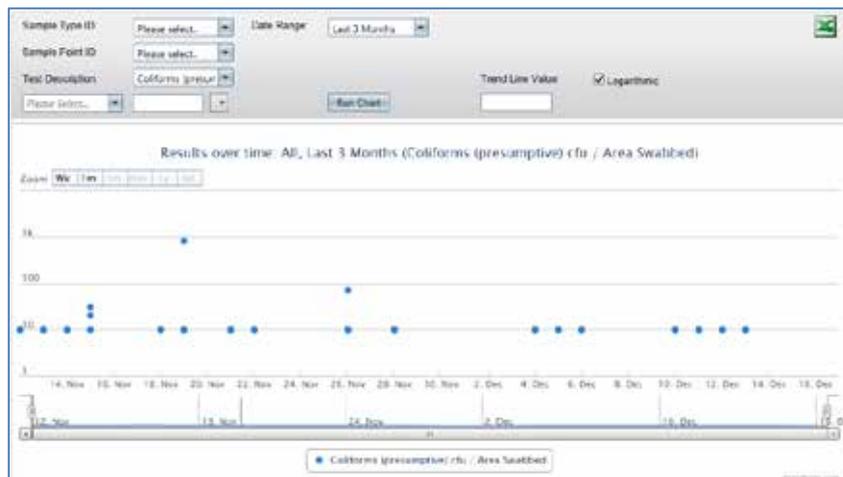
You can use the zoom menu on the graph, click onto the graph or use the scroll bar below the graph to zoom in and out of the data.



If you require the graph and the results from this search in Excel, please select the Excel icon and your report will be available in the **'My Reports'** tab.

17) Results Trend

Trend results by test over a specified period of time. See the Sample Activity section above for details.



18) Test Status

Show % pass/warning/action/no spec over a specified period of time.

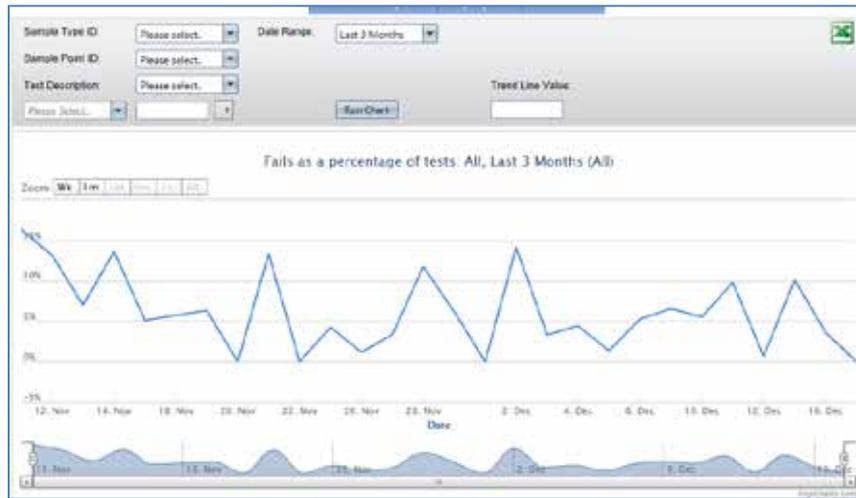
Filters can be used to drill down into the data and the graph and data can be exported to Excel by selecting the Excel icon.





19) Failed Tests Trend

Show fails as a percentage of tests over a specified period of time. You can filter this information as per the sample activity graph.



20) Shelf Life

Export a graph and data for a shelf life trial.

You are able to select and deselect tests from the graph by selecting the tests in the key.

You will need to have registered your samples through Webtrieve in order to use this feature.



Highlight the Description field, type in the sample description and click **'show dates'**.

If samples with those descriptions have been submitted on more than one date, you will need to select this from the drop down.

Click **'Update report'**

You can then export to Excel or open the graph and results as a PDF.



21) Nutritional Grid & Nutritional Templates

In order to access this template, you must be using on-line registration for your samples.

In the Dashboards area, please click on **'Nutritional Grid'** from the menu items.

Highlight the sample description field, type in the sample description and click **'show dates'**.

A second row of fields will appear. Click on the down arrow next to the received date box and click on the relevant date. Insert relevant information into the other two boxes and click **'update table'**. If the **'per serving'** value is changed, press **'update table'** again.

The table can then be downloaded into excel.

Please do not use the Adobe format report, as it is in the 'BETA' development format.

The screenshot shows the 'Nutritional Grid' interface. At the top, there are navigation tabs: 'Report Settings', 'Default Search', 'Sample Activity', 'Results Trend', 'Test Status', 'Failed Tests Trend', 'Short Lists', and 'Nutritional Grid'. Below these are sub-tabs: 'Nutritional Templates', 'My Reports', and 'Downloads'. The main area contains a form with the following fields: 'Descriptor' (Albacore Tuna), 'Received Date(s)' (09/07/13), 'Per Serving Title', 'Per Serving Value', and 'Nutritional Template' (Index). There is a 'New Rounding Rules' checkbox. Below the form is a table with the following data:

Test	Result (1558728) 09/07/13	Result (1558729) 09/07/13	Result (1558732) 09/07/13	Average	Method
Moisture (loss on drying) g / 100g	71.3	72.0	71.6	71.6	
Protein (16x25) g / 100g	27.20	26.30	27.50	26.87	
Ash g / 100g	1.3	1.3	1.3	1.3	
Total Carbohydrate (by difference) g / 100g	+8.1	+0.1	+0.1	0.2	
Total Dietary Fibre (ISOAC) g / 100g	+8.5	0.8	0.5	+0.5	
Available Carbohydrate (by difference) g / 100g	+8.1	+0.1	+0.1	+0.1	
Energy kcal / 100g	120	121	121	121	
Energy kJ / 100g	507	512	511	497	
Total Sugars (expressed as Glucose) g / 100g	+8.1	+0.1	+0.1	0.0	
Starch (by calculation) g / 100g	+8.1	+0.1	+0.1	+0.1	
Sodium mg / 100g	51	74	51	61	
Salt (by calculation) g / 100g	0.14	0.19	0.13	0.13	

Below the table, there is a disclaimer: 'The calculated nutritional averages are based upon the above selected samples. Please note that no allowances have been made for products which may contain additional novel ingredients such as insulin and/or sugar alcohols. The calculated nutritional averages are not covered by the scope of our UKAS Accreditation and should be verified before use in a nutritional panel. ALS Food and Pharmaceutical accept no liability for misuse of the data provided. Please visit original certificate of analysis for any other comments relating to the samples and / or results.'

22) Nutritional Templates

- Nutritional specs can be uploaded to Webtrieve to compare your Nutritional Grid with FIR.
- Click onto the **'Nutritional Templates'** tab.
- You can either upload single templates by clicking **'Add New Template'** or if you download the Excel template, you can upload your specs in bulk.
- If using the excel template, add each specification line by line, with the target nutritional values and a suitable specification name e.g. Coles Cooked
- Once complete, upload your file to the system by clicking **'select'** on the upload template line
- To edit existing templates on screen, select from the **'Active Templates'** list and **'View/Edit'**.
- To use the template for comparison with your actual results, follow steps 2-4. Select the appropriate template from the Nutritional Template drop down list and click **'Update Table'**.
- An extra column of data will appear on the right hand side detailing your target spec. The values will highlight whether the sample has met these targets by a colour coding of green for pass or red for fail.

23)

My Reports

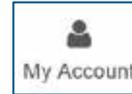
Access all your Excel exports from the 'My Reports' tab.

24) Downloads

Automated Excel downloads will continue to run for monthly and quarterly reported results.



Using My Account



25) Preference Settings

You can set yourself up to receive emailed notifications of new certificates/invoices which upload to WEBTRIEVE (these are daily summaries). You can also receive email notifications of OOS results either as they are uploaded to WEBTRIEVE or receive a daily summary of any OOS results.

- Under the **'My Account'** section, click **'Preferences'**.
- Tick the relevant boxes.
- Click update.

Notification Profile

Certificates Notification Do NOT notify me Notify me

Invoices Notification Do NOT notify me Notify me

OOS Results Do NOT notify me Every Result Daily Summary

OOS Pathogen Results Do NOT notify me Every Result Daily Summary
(Listeria, Salmonella, Campylobacter, e.coli 0157)

Information Detailed (Sample Information, Test Information and Results)
 Basic (OOS Count)

Email Format HTML Plain Text

26) Changing your Password

- Go to the **'Preferences'** section.
- On the right of the screen you are able to enter your current password and the new password you need setting.
- Click Change Password.

27) Adding/Updating/Deleting Products and Suites

Please contact Client Services and they will arrange for this to be updated for you – ServiceAustralia@alsglobal.com.

28) Default PO Numbers and Invoices

- What is a default PO (Purchase Order)?

If you have a blanket PO e.g. for a Week/Month/Year - a default PO can be set in WEBTRIEVE so that it is applied to all samples being booked in without it being entered at registration.

An expiry date is set to prompt users when this PO number is no longer valid.

- How to set/update a Default PO

- From the **My Account** section, hover over invoices.
- Click on Default PO
- If no Default PO is currently set – It will say **'Default PO Not Applied'** to the top left of the screen
- If a Default PO has been applied, it will be shown to the top left of the screen with details as to which user uploaded it and when it expires.
- To add or update a PO, click **'Update'**
- Enter the PO you wish to apply, the expiry date and a comment
- Click **'Update'**.

This PO will now apply to all samples at registration.

It can be overwritten at registration if, for any reason, the PO may change for particular samples.



29) Viewing Invoices

From the **My Account** section, hover over invoices. Click on **'View Invoices'**

Invoices are listed by month (this can be changed in the drop-down), with the invoice number, currency, value and date.

They can be downloaded by clicking on **'Download Invoice'**.

30) Certificate Library

All PDF certificates are available in the sample tracker alongside sample details however they are also stored by month in My Account.

- From the **My Account** section, click on **'Certificate Library'**
- The view will default to the current month and certificates will be listed by Certificate Number, Sample Number and the Issued Date.
- You can view historic certificates by changing the month from the drop-down menu
- You can customise your view by clicking on the Configure Available Columns icon 
- Tick the boxes for the field you wish to see in the table to make searching for your required certificates at a glance easier
- Select **'Apply'**
- Your view will have now been updated



Label Printing from WEBTRIEVE

Lyreco/Avery Product Codes (2x8 Labels No Selvedge)

Lyreco: 143.555

Avery: 3484

Labels must be printed using a Laser Jet printer.

Resetting Printer Margins

Labels do not fit to one page when the Internet Explorer setup contains headers and margins. By setting these to ZERO, it will reset to the minimum allowed for that printer. Follow stages 1, 2 and 3 below in order to do this:

