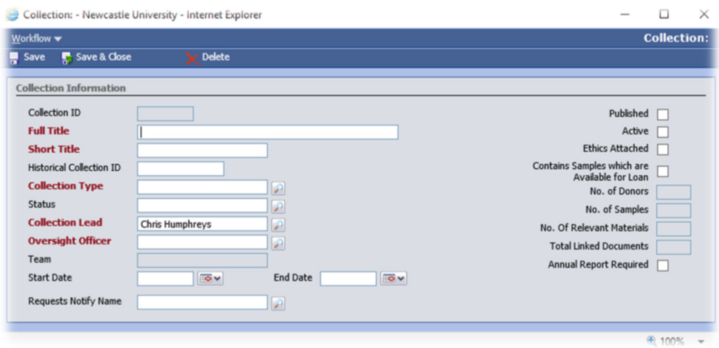
COLLECTION MANAGEMENT

Collections form a central link within Achiever between Donors, Participants, Storage Locations and Samples. Users are able to create new Collections or edit existing ones depending on their access rights.

ADDING A NEW COLLECTION

- Navigate to the Collections  functional menu

- Select the Collections area menu to open the Collections records grid
- Select the Insert New Collection workflow



- Complete the mandatory fields
- Full Title/Short title are used for reporting purposes. Some Collections may have very long title, so the short title can be different
- Collection Lead typically represents the PI
    - The Collection Lead is the custodian of samples held within the collection
- Oversight Officer typically represents the HTA PD
    - The Oversight Officer will implicitly have read only access to the Collection, without the need for an entry in Collection Staff
- Contact Achiever support to have new names added to the lists
- The user creating the collection will be added to Collection Staff as a Principal Investigator automatically

MANAGING COLLECTION STAFF

Users with a Principal User or Principal Investigator role within a Collection may add and edit Collection Staff records.

- Within a Collection record, select the Collection Staff navigation option
- Existing collection staff will be displayed in the records grid
- To add a staff record, select the 'Insert Collection Staff' workflow
    - Choose a registered Achiever user from the list
    - Ensure their status is Active
    - Select a role
    - Click Save & Close
- To withdraw access to a Collection for an existing user
    - Click the status (active) hyperlink to open the staff record
    - Change the Status field to Withdrawn

- Click Save & Close
- The user will no longer have access to the Collection, Participants and Samples

- Roles may also be changed according to requirements
    - Principal User and Principal Investigator are interchangeable, providing full access to perform any operation on the Collection, and any Donor, Participant, or Sample record linked to it
    - The Read only role provides no workflows
    - Other roles are listed below

STAFF ROLES

The following table shows a selection of workflows and operations that applies to each Collection Staff Role:

	Read Only	Curator	Student	Tissue User	Tissue Collector	Principal User	Principal Investigator	Oversight Officer	Collection Lead
View Collection and linked Samples, Participants, Donors	✓	✓	✓	✓	✓	✓	✓	✓	
Edit Collection						✓	✓		
Publish Collection								✓	✓
Insert/Edit Collection Staff						✓	✓		
Insert Consent		✓	✓	✓	✓	✓	✓		
Edit Consent					✓	✓	✓		
Withdraw Consent						✓	✓	✓	
Insert/Edit Participant						✓	✓		
Insert/Edit Samples					✓	✓	✓		
Check out sample				✓	✓	✓	✓		
Check in sample						✓	✓		
Update sample properties						✓	✓		
Conduct Analysis/Process				✓		✓	✓		
Mark Sample as Destroyed						✓	✓		
Mark Sample as Used Up				✓ (if sub-	✓ (if sub-	✓	✓		

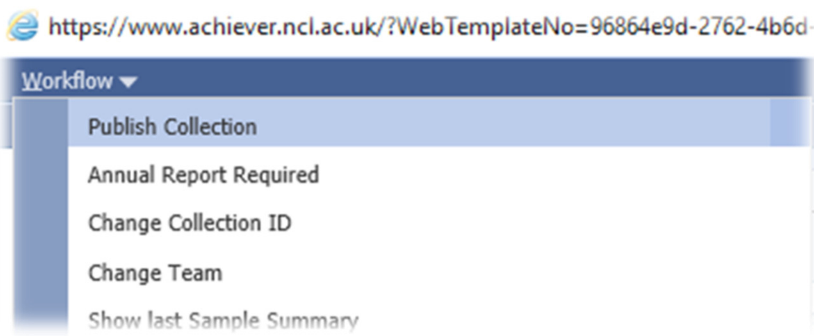
				collectio n role)	collectio n role)				
Link Sample to sub-collection						✓	✓		
Print Labels	✓	✓	✓	✓	✓	✓	✓		
Insert/Edit Clinical Data	✓	✓	✓	✓	✓	✓	✓	✓	
Insert/Edit Linked Documents	✓	✓	✓	✓	✓	✓	✓	✓	
Manage Collection Assets						✓	✓		
Insert New Sample/New Sample Group					✓	✓	✓		
Split Sample(s) (including Simple Aliquot workflow)						✓	✓		
Multiple Sample Receipt					✓	✓	✓		

STORAGE LOCATIONS

After creating a collection, it will be necessary to add storage locations to the collection. This is performed from the storage location itself, for more details please see the training guide titled *Storage Configuration Management*.

PUBLISHED COLLECTIONS

Authorised users may mark a Collection as Published by following the Collection-level workflow:



Collections marked as published as visible by ***all*** Achiever users, who are given implicit read-only access.