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Order Manager

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Summary:

Explains how to use the Order Manager, to create orders for biosamples.



Main article: Order Manager

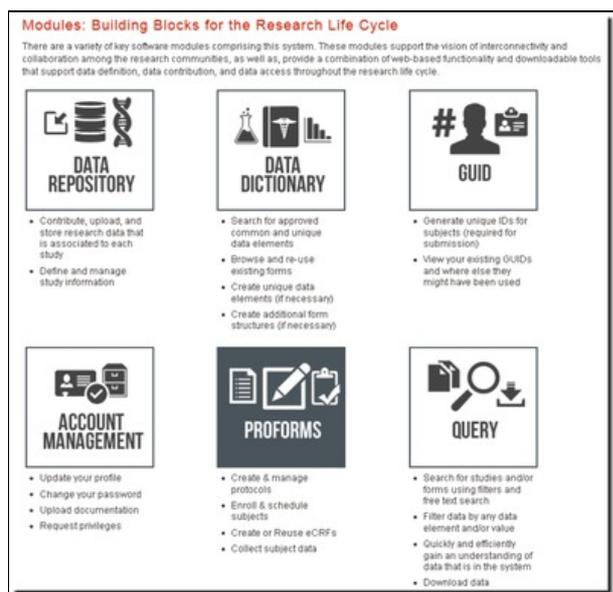
Order Manager

The Order Manager module is a part of the Account Management module and designed to:

- Help users to complete and submit biosamples orders;
- Help users to fill out the research-related information requested by the biorepository (Coriell  or Harvard);
- Help users to download, sign and then upload the NINDS Human Genetics Repository MTA;
- Help users to fill out the shipping information;
- Help users to save and submit his/her order.

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Ordering biosamples



To order biosamples you need an access to the following system modules - the Query Tool and Account Management (to access the Order Manager module). Click on the image to view in higher resolution
To order biosamples you need an access to the following system modules - the Query Tool and Account Management (to access the Order Manager module).

Before ordering biosamples you need to:

1. Obtain an access to the system - this requires a user account. Read more: Requesting an Account to PDBP [↗](#)
2. Obtain the user login and password, you can create your username and password when filling out the Account Request form.
3. Obtain the user privileges needed to order biosamples. These you can request when filling out the Account Request form. See also: System-level privileges [↗](#)
4. Obtain the system URL - this will be provided to you by email after your account request has been approved.
5. Log in into the system.

Read more:

- The Account Request form [↗](#)
- How to log in [↗](#)
- Requesting an Account to PDBP [↗](#)
- The Ordering Biosamples brochure on the PDBP web site [↗](#)

1. Obtain an account to the system

In order to log in into the system, a user must have a valid user account. The user account is created manually by the system administrator by request.

In support to your account request, you might be required to submit specific documents depending on your project.

- Read how to request an account to PDBP Data Management Resource [↗](#)

- Read how to request an account to FITBIR [\[link\]](#)

Contact the Operations team if you have any questions.

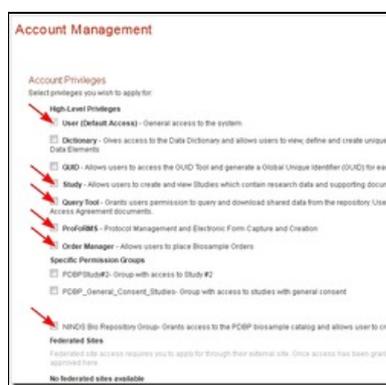
2. Obtain the user login and password

You can enter your username and password when filling out the page 1 of [RequestingAnAccountPDBP#Filling_out_the_Account_Management_form][the Account Request form]].

To reach the the online account request form,

1. Navigate to the PDBP DMR
2. Click the Request An New Account link. The Account Management page appears.
3. Fill out the Account Management form (2 pages).

3. Obtain the user privileges



Requesting a user privileges. Click on the image to view in higher resolution

On the page 2 of [RequestingAnAccountPDBP#Filling_out_the_Account_Management_form][the Account Request form]], request the user privileges needed to:

1. Access the system modules,
2. Create biosamples orders,
3. Request biosamples.

An example set of user privileges is shown below:

- User - this level provides a general access to the system, granted by default.
- Study - this level allows the user to create and view studies, which contain research data and supportive documentation. You need this privilege also to submit data in spreadsheet format and to access collected data by type of form and date of submission;
- ProFoRMS - this level grants the user access to ProFoRMS.
- Query - to view collected data in table format. This privilege also grants the user permission to mine data and downloaded query results. ⓘ You need this privilege to be able to order biosamples.
- Order Manager - provides an ability to place biosample orders. ⓘ You need this privilege to be able to order biosamples.
- NINDS Bio Repository Group - grants access to the PDBP OrderManager and allows users to create biosample orders.

Read more: Requesting an Account to PDBP [\[link\]](#)

1. Obtain an account to the system

4. Obtain the system URL

The system URL will be provided to you automatically by the email after your account request has been approved (no human interaction here).

5. Log in into the system

After receiving your user account information,

- Navigate to the system web site using the URL provided to you by the system-generated email.
- In the log in form, enter your used credentials and press Log In.
- You will be automatically navigated to the system home page that shows a list of system modules. These modules provide a combination of web-based functionality and downloadable tools that support data definition, data contribution, and data access. To order biosamples you need an access to the following system modules - the Query Tool and Order Manager.

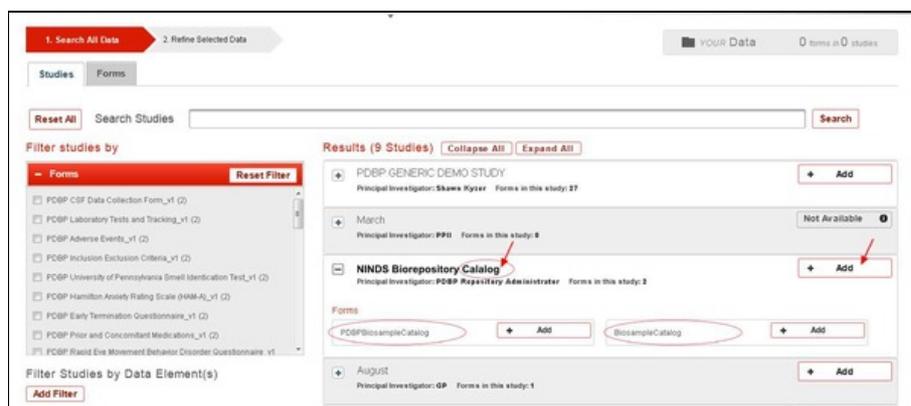
See also:

- How to log in [👉](#)
- Requesting an account [👉](#)

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Using the Query tool to access the biosamples' catalog

The list of biosamples for ordering is available via either the "NINDS Biorepository Catalog" study. In order to reach for that study, you need to use the Query tool to find the biosamples catalog study and add it to your query list.



Use the Query tool to locate the

An outline of the process

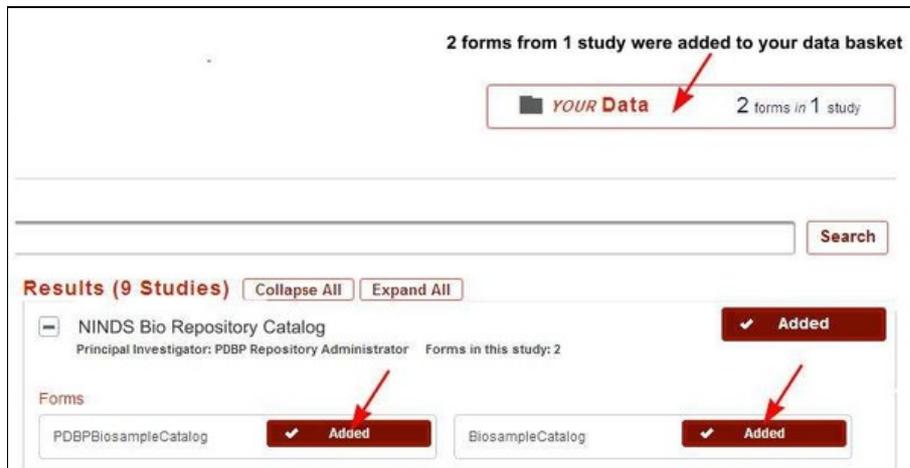
In order to create an order for biosamples, you need to:

Use the Query tool

1. Navigate to the Query tool and find a specific study that contains biosamples you need. This type of study generally has the word "Catalog" in its name. 📄 In case the word "catalog" is missing in the study name and/or you cannot find a catalog study in the study list, perform the keyword search for

4. Obtain the system URL

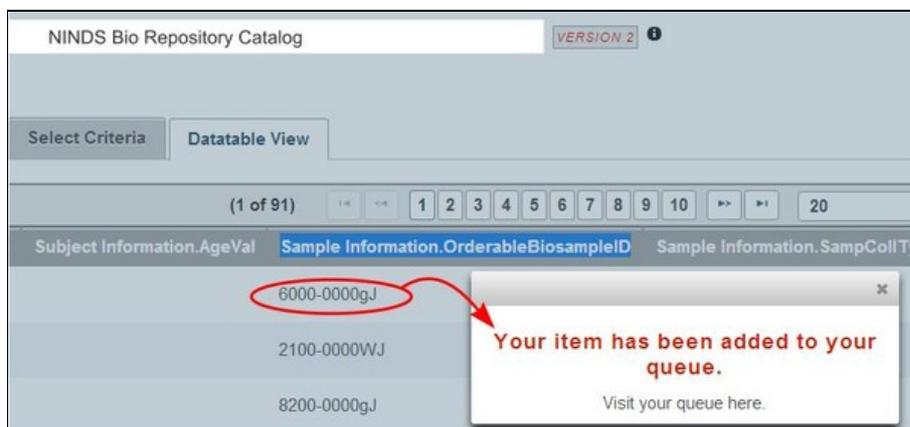
- forms that has "catalog" in their names.
2. Open the biosamples data the Query Tool Datatable View and use the check boxes to select biosamples you would like to order.
 3. Add biosamples to the Order Manager queue.



Two forms from one study were added to your data basket. Click to view the whole image in higher resolution.

Use the Order Manager tool

1. Now, navigate to the Account Manager > Order Manager module and view your queue.
2. Use the Order Manager to either create a new order, or to add biosamples to the existing order.
3. For a new order, fill out all required fields. The administrator will receive your order, review, approve/deny, and send it out.
4. Contact the Order Manager administrator to make sure he/she approved your order.



A biosample was added the the Order Manager queue. Click to view the whole image in higher resolution.

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Ordering biosamples step-by-step

Selecting biosamples

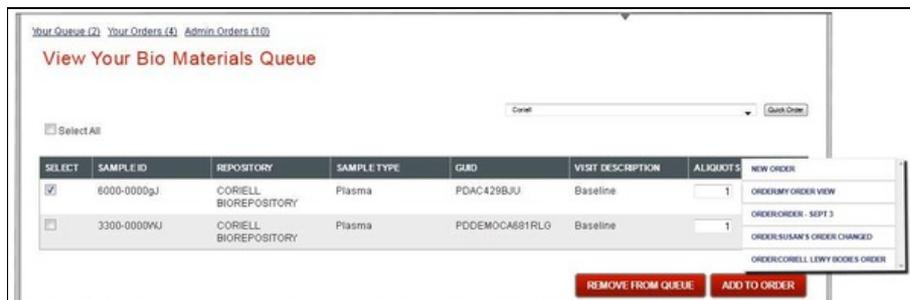
1. Navigate to Query tool.

Use the Query tool

2. Open the Query tool in Study View. The list of studies appears.
3. If you know the study name, navigate to the study. Or, search for studies that have the word "Catalog" in the study name.
4. Press Add to add the form(s) data basket. The button next to the form name changes its status to 'Added" and the form appears in the data basket.
5. Click on "Your Data" box to open the data basket and view the data. You will be navigated to the next page of the Query tool.
6. Click the Datatable tab located at the top of the page. This tab contains actual data from the forms you selected. The data are presented in the table format similar to MS Excel format. Each column contains data collected for a particular data element. The column headers contain the combination of the form section name+ the data element name. For example "Sample Information. OrderableBiosampleID".
See also: CreatingForms and FormsAndFormStructures.
7. Use the scroll bar located at the bottom of the table to navigate to the "Sample Information. OrderableBiosampleID" column.
8. Review the data in this column. Find the sample IDs for those samples you would like to order.
9. For each sample you would like to order, click on the sample ID. The information window appears with the following message: "Your item has been added to your queue." That means that the sample has been added to your order queue. Repeat this step for as many samples as you need to order.
10. To view your order queue, either click on the "Visit your queue here" link in the information window, or navigate to the Order Manager and view it from the Order Manager page.

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Finalizing your order



Adding a biosample to a new order. Click on the image to view in higher resolution.

To finalize your order, navigate to the Order Manager. First, click Account Management on the main system menu, then click Order Manager on the side menu. The "View Your Bio Materials Queue" page appears. On this page:

1. Use the Quick Order drop-down box to specify where you would like to send the order. Current choices are Coriell  and/or Harvard.
2. Select samples which you would like to add to your order (use the check box next to the sample ID to select/deselect the sample).
3. For each sample specify the number of aliquots.
4. Press the Add to Order button and choose between the following changed options: 1) select "New Order" to create a new order or 2) select the existing order name to add more samples.
5. You will be transferred to the Order Manager page.

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New order

On the Order Manager page fill out the required fields. Click on the image to view in higher resolution.

Once you have created "Your Bio Materials Queue", you can create a new bio sample order. Navigate to Account Management > Order Manager. On the Order Manager page, view the "View Your Bio Materials Queue" page appears. On this page:

1. Use the Quick Order drop-down box to specify where you would like to send the order. Current choices are Coriell  and/or Harvard.
2. Select samples which you would like to add to your order (use the check box next to the sample ID to select/deselect the sample).
3. For each sample specify the number of aliquots.
4. Press the Add to Order button and select "New Order" to create a new order. You will be transferred to the Order Manager page to complete your order.

To complete a new order,

1. Fill out the following required fields (ones with asterisk *): Order Title, Abstract, Experimental Design/Power Analysis.
2. Upload required supporting documentation including a signed copy of the NINDS Human Genetics Repository MTA.
3. Fill out the required fields under Shipping Address.
4. Fill out the optional information including comments (if needed).
5. Press Save and Submit to request your samples for shipping.
6. Press Save and Exit to save your order for future use.

Press Save and Submit to request your samples for shipping. Press Save and Exit to save your order for future use. Click on the image to view in higher resolution.

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Supporting documentation



Click on the image to view in higher resolution. Adding supporting documentation including NINDS Human Genetics Repository MTA.

In order to request biosamples, you need to submit a signed copy of NINDS Human Genetics Repository Material Transfer Agreement for Biospecimen (NINDS Human Genetics Repository MTA). The downloadable version of this document (in PDF) is available under the Add Supporting Documentation section of the Order Manager.

You need to,

1. Download the document (NINDS Human Genetics Repository MTA);
2. Print it and sign;
3. Scan the signed document;
4. Upload the scanned copy via the Upload Supporting Documentation link. The list of uploaded files appears under Attached Files.

If you have any other additional documents that you would like to submit with your order, use the Upload Supporting Documentation link to upload the files.

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Existing order

In case you need to add bio samples to an existing order,

1. Make sure that the information in the required fields is up to date. Check the information entered into the Order Title, Abstract, Experimental Design/Power Analysis, and all fields under Shipping Address.
2. Fill out the optional information including comments (if needed).
3. Upload the additional required supporting documentation including **a signed copy of the NINDS Human Genetics Repository MTA** which is needed for each order.
4. Press Save and Submit to request your samples for shipping.
5. Press Save and Exit to save your order for future use.

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Approving the order

The order must be approved by the administrator prior shipping. Make sure you contact your order administrator to ensure shipping.

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Prerequisites

- The user is able to log in into the system with privileges to view data and to use the Query Tool.
- At least one Catalog-type study exist in the system. See also: Create Study.

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See also:

[Getting Started](#), [Data Repository Tools](#), [Query Tool](#), [Manage Studies](#),

| Topic | Summary |
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| Topics found | 14 |
| BRICSIntroduction | An introduction to BRICS and ProFoRMS. Biomedical Research ... |
| Contact Us | Explains how to contact PDBP or FITBIR Operations. Main ... |
| Dashboard | Explains the system dashboard. A quick snapshot of study updates ... |
| Getting Started Log In | Explains how to log in and log out. Main article: GettingStarted ... |
| Getting Started Select Study | Explains how to select a study. Main article: Getting ... |
| Proforms Introduction | A short introduction to the Protocol and Form Research Management ... |
| Requesting An Account | Explains (in short) how to request a new account. Main ... |
| Requesting An Account FITBIR | Explains how to request an account to FITBIR. Main article ... |
| Requesting An Account PDBP | Explains how to request an account in full detail. Main ... |
| Search | Explains search in ProFoRMS. #SimpleSearch Simple Search The ... |
| Select Study In FITBIR | Explains how to select a study via the Data Repository module ... |
| Select Study In PROFORMS | Explains how to select a study, sort the list of studies, view ... |
| Understanding System Capabilities | An overview of ProFoRMS features and capabilities. About ProFoRMS ... |
| User Roles | Explains user roles and privileges in the system and in the study ... |

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