	Title: Management of Samples and tracking using Itemtracker Infinity consent.	Author: G. Cockerill	Date: 2/Oct/2012
	No: SOP_R6	New Author: P. Madhou	Date: 1/Sept/2024
	Version: 7		Review Date March 2026




**SOP_R6: MANAGEMENT OF SAMPLES AND TRACKING
USING ITEMTRACKER INFINITY.**

Disclaimer

When using this document, please ensure that the version you are using is the most up to date either by checking on the CITY SGUL/PORTAL/HTA website for any new versions or contact the HTA coordinator to confirm the current version.

Out of date documents must not be relied upon and should be destroyed.

7	Sept 2024	City merger & Review	PM/AS	HTLRG
6	Sept 2023	New DI, update contacts & formatting	AS	HTLRG
6	Jan 2023	Itemtracker Infinity (new version)	AS	HTLRG
5	Sept 2022	New DI, Add PD & Review (New version-Infinity)	AS	HTLRG
4	April 2020	Review (Section 10 & 11 additions)	AS/PL	HTLRG
3	March 2018	Reviewed & Amended (New Author)	AS	PL
3	July 2017	Reviewed and PD contact details updated	AS	PL
3	July 2017	Reference to HTA codes updated	PL	HTLRG
3	July 2017	Reviewed and PD contact details	PL	HTLRG
2	05/12/16	Update contact list	AS	PL
2	07/10/16	New DI details	AS	MF
2	17/03/16	Issue for use	GC	HTLRG
1	31/10/12	Issue for use	GC	HTLRG
0	30/10/12	Issue for review	GC	HTLRG
Rev	Date	Amendment	Approved by	Authorised by

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Title: Use of ItemTracker Infinity™ Software for HTA Freezer Sample Management

1. Purpose/Background

1.1 This SOP outlines the procedures for using the ItemTracker Infinity™ software as a tool for tracking and managing Human Tissue Authority (HTA) freezer samples at City, St George's University (CSGUL).

2. Scope

2.1 This SOP applies to activities covered under HTA Licence 12335 (storage of relevant material from a human body for scheduled purposes). While specifically designed for HTA-regulated activities, this SOP can also be applied to any ethically approved research using human tissue.

3. Overview

3.1 ItemTracker Infinity™ is a networked sample management database hosted on the secure CSGUL server. Access to the database is password-protected and restricted to authorised users. The software records detailed information about each specimen, including location, consent status, ethics number, and intended use. Each specimen is assigned a unique ItemTracker Infinity™ ID number.


3.2 All human biological material containing human cells that is stored for research purposes must be entered into ItemTracker Infinity™, including organs, tissue, blood, plasma, and cells. Samples must either have a valid Research Ethics Number or, if expired, be archived under HTA Licence 12335. Samples without ethics approval must comply with HTA requirements and **cannot be used** for research until ethics approval is obtained.

3.3 The ItemTracker Infinity™ database is accessible from any networked SGUL computer using a web browser (IE, Firefox, or Chrome) via the URL: <https://itemtracker2.sgul.ac.uk/#/>. The program can also be accessed remotely using Mydesktop and a web browser. To gain access, an account must be requested from the ItemTracker system administrator. Contact labhelp@sgul.ac.uk.

Each research group maintains confidentiality and access is limited to their own samples.

4. SOP Contents

Section	Content Description
5.0	Logging on
6.0	Creating a New Storage Location
7.0	Creating New Samples
8.0	Editing Items

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Section	Content Description
9.0	Importing from Excel into ItemTracker
10.0	Searching for Stored Samples/History/Auditing
11.0	Printing Labels from ItemTracker
12.0	Training
13.0	References
14.0	Amendment of SOP

5. Logging on

5.1 Open any browser and navigate to <https://itemtracker2.sgul.ac.uk/#/>.

5.2 Enter your username and password to log in.

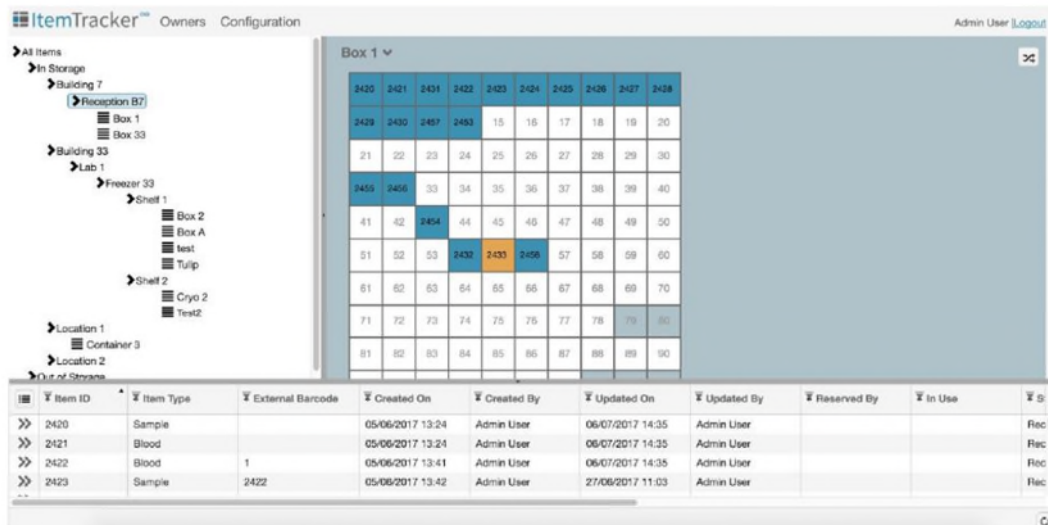
Login

Please enter your username and password.

*Username:

*Password:

Main screen




The screenshot shows the ItemTracker interface. On the left is a navigation tree with categories like 'All Items', 'In Storage', 'Building 7', 'Reception B7', 'Box 1', 'Box 33', 'Building 33', 'Lab 1', 'Freezer 33', 'Shelf 1', 'Box 2', 'Box A', 'test', 'Tulip', 'Shelf 2', 'Cryo 2', 'Text2', 'Location 1', 'Container 3', 'Location 2', and 'Out of Storage'. The main area displays 'Box 1' with a grid of 10x10 cells, each containing an item ID. The bottom section is a table with columns: Item ID, Item Type, External Barcode, Created On, Created By, Updated On, Updated By, Reserved By, In Use, and a status icon.

Item ID	Item Type	External Barcode	Created On	Created By	Updated On	Updated By	Reserved By	In Use	Status
2420	Sample		05/06/2017 13:24	Admin User	06/07/2017 14:35	Admin User			Rec
2421	Blood		05/06/2017 13:24	Admin User	06/07/2017 14:35	Admin User			Rec
2422	Blood	1	05/06/2017 13:41	Admin User	06/07/2017 14:35	Admin User			Rec
2423	Sample	2422	05/06/2017 13:42	Admin User	27/06/2017 11:03	Admin User			Rec

This is the main screen of ItemTracker; the main window from which much of the functionality to manipulate your records can be accessed.

The screen is divided into three sections.

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Top left – **MAP**

Top Right – **CONTAINER VIEW**

Bottom screen - **DETAILS** of samples in rows and columns.

6. Creating a New Storage Location

6.1 Upon logging in, under the MAP section, you will see a list of your group's room numbers and the freezers contained within each room.

6.2 Each freezer has several shelves assigned to it. Shelves can be assigned a rack, box, or other container type where samples can be added.

6.3 Right-clicking on a storage location allows you to create and manage storage options such as Room, Freezer, Shelf, Rack, or Box.

Right-clicking on a storage location will enable the following


Add Storage Location	- Eg Room, Freezer, Shelf, Rack
Add Container	- Box A, B etc
Edit Storage Location	
Copy Storage Location	
Delete Storage Location	
Create Items	
Export Storage Locations	
Import Storage Locations	
Export Containers	

7. Creating New Samples

7.1 To create a new sample, select the appropriate location in the CONTAINER section and right-click.

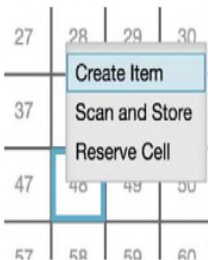
7.2 Click on the CREATE icon and fill in the required fields: Sample ID, Sample Date, Sample Type, Research Ethics Committee Number, Ethics Expiration Date, and whether the sample is stored under the Research HTA License.

7.3 Once all fields are completed, click the "Create" tab to save the sample to the selected container location.

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Box 1 ▾

2420	2421	2431	2422	2423	2424	2425	2426	2427	2428
2429	2430	2457	2453	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
2455	2456	33	34	35	36	37	38	39	40
41	42	2454	44	45	46	47	48	49	50
51	52	53	2432	2433	2468	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90




4.1 Empty Cells

Right clicking on an empty cell allows the following functions to be performed: Create Items, Scan and Store and Reserve Cell.

8. Editing Items

8.1 Right-clicking on an item in storage allows you to:

- **Move Item:** Relocate the item to another cell/container.
- **Edit Item:** Modify field values (if you have permission).
- **Mark Item "In Use":** Indicate the item is currently being used, preventing others from using the storage location.
- **Reserve Item:** Reserve the item to a group or user.
- **Copy Item:** Create an exact copy of the item (excluding certain identifiers).

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- **Delete Item:** Remove the item from the Container view. Deleted items can be retrieved by selecting “Include deleted items in results” in the Search window. The history of deleted items is always accessible.

9. Importing from Excel

9.1 Use the Excel template provided by your administrator to import samples for your group. Populate it with sample details and their corresponding storage positions.

9.2 Label the Excel tab as “Items Table”.

9.3 In ItemTracker, right-click on the menu button (three horizontal bars) and select “Import from Excel”. Attach the Excel file and allow the system to process the import.

9.4 If there are errors during the import, a report will be generated specifying the issues. Contact your administrator if you encounter any errors.

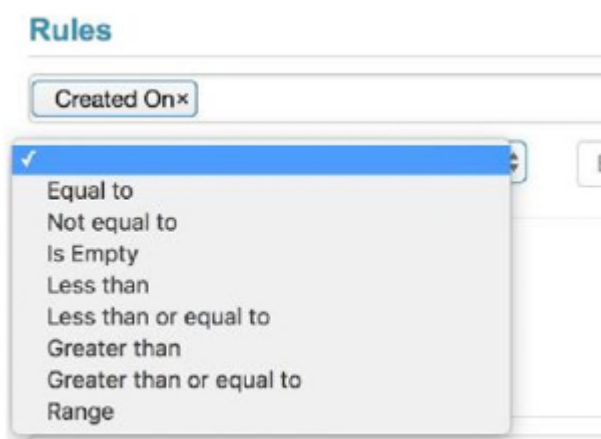
10 Samples/History/Auditing

10.1 Use the magnifying glass icon in the CONTAINER section to access the search fields. You can search for your sample using any property field or date range.

10.2 The advanced search allows you to apply specific rules to refine your search.

Use the magnify button (Q) on container section of the screen


You will be presented with the search fields Here you can search for your sample using any of the property fields or dates.



You can also use the advance search using rules as illustrated in the screenshot

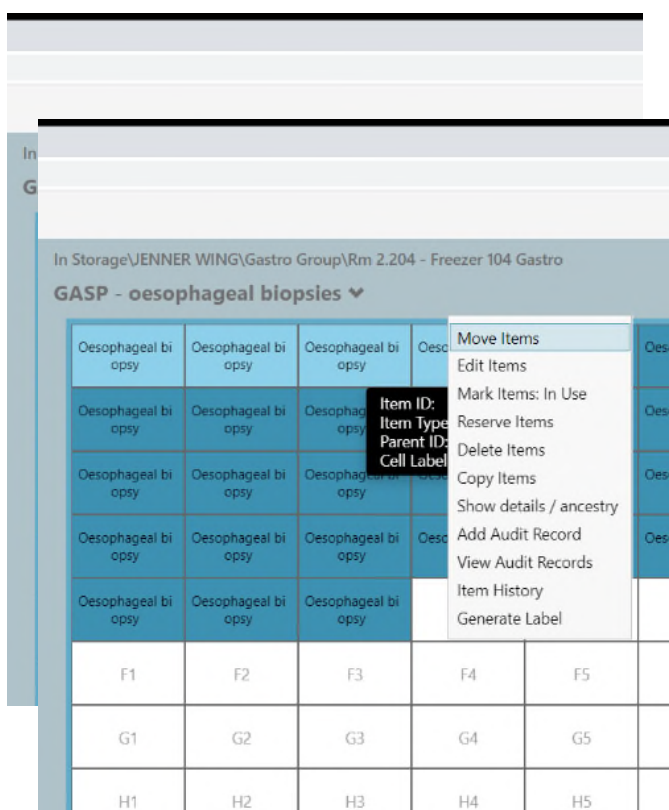
11. Printing Labels from ItemTracker

11.1 Labels can be generated from the CONTAINER screen. Select the samples you want to label (use the Ctrl key for multiple selections), then right-click and choose “Generate Label” from the drop-down menu.

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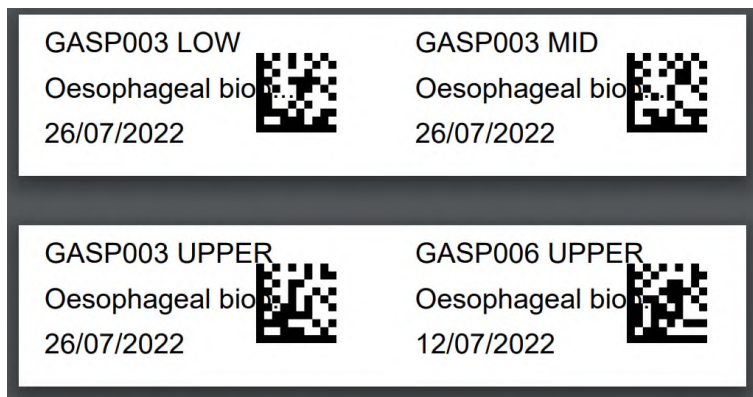
11.2 The STANDARD template is customized to print the ID, Sample Type, and Date. Labels are saved as PDF files, which can be sent to a Brady printer for printing.

11.3 Labels are printed on Freezerbondz™ labels, designed to adhere at ultra-low temperatures. Three Brady IP 300 printers and one i5000 printer are available in Jenner Wing, with departments responsible for the cost of labels.




Labels can be created from the CONTAINER screen.

To print labels, select your samples (use ctrl key for multiple samples), then left click on the mouse button and select “Generate label” from drop down menu.



The STANDARD template is customized to print the **I.D, Sample Type and DATE** . The labels will be saved in a pdf format file which you can send to a Brady printer for printing

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12. Training

12.1 All staff using ItemTracker software will undergo three training sessions covering the following:

- **Session 1:** Introduction to ItemTracker, basic usage, and everyday tasks.
- **Session 2:** Group and user allocation, creating storage containers, samples, and importing data from Excel.
- **Session 3:** Searching and sorting data, printing labels, and understanding history and auditing features.

13. References

- [Human Tissue Authority](#)
- [ItemTracker - Sample Management & Tracking Software](#)
- [Brady Identification Solutions](#)
- Relevant documents on the HTA Portal

Useful documents on HTA Portal

Useful documents

[Code E – Research code of practice](#) (PDF)

[HTA research sector licensing standards](#) (Word)

[HTA workshop](#) (Powerpoint)


[HTA examples](#) (Word)

14. Amendment of SOP

14.1 Users who identify modifications to improve this SOP should notify the Person Designated (PD) for review and implementation.

15. Contacts DIs and PDs

Research Licence	DI	Dr Priya Madhou	Ext 1603	pmadhou@sgul.ac.uk
	PD	Mr Ash Sameja	Ext 2428	asameja@sgul.ac.uk
	PD	Ms Lara Painter	Ext 3077	lpainter@sgul.ac.uk
	DI	Miss Georga Longhurst	Ex 5208	glonghur@sgul.ac.uk
	PD	Mr Paul Carter	Ext 5228	pcarter@sgul.ac.uk

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Anatomy Licence	PD	PATHOLOGY MUSEUM Dr Carol Shiels	Ext 0729	cshiels@sgul.ac.uk
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