

Save Time & Improve Organization with Copia Sample Tracking

For laboratories that process many samples daily, a key component to organization and increased productivity is the ability to track the transport and storage of each sample throughout the laboratory testing process. Orchard Software understands this need and has developed an exciting new module for Orchard® Copia®—Sample Tracking. This module is available as an optional add-on beginning with the January 2018 release of Copia.

Locate Samples Quickly

The Sample Tracking module makes it easier to locate a sample at any point, from when it is drawn or received until it is no longer good for testing and is disposed of. Additionally, you can use this feature to establish sample tracking on automation lines.

Sample Tracking Setup

When using this module, you set up all trackable items in your laboratory as types of “metacontainers.” Metacontainers represent real-world containers, such as a department, refrigerator, freezer, tube rack, long-term storage, or sendouts to reference labs. With adequate security access, you can configure metacontainer types by assigning a name, description, and layout to each type of storage container the laboratory uses.

Once you define the metacontainer type (e.g., refrigerator), you can create metacontainers to represent physical containers in the laboratory, such as a specific department refrigerator. During setup, you also create the other metacontainer types that can be stored within this metacontainer type. For example, a rack would be a metacontainer

type you can store in a shelf metacontainer type, which you could configure to be stored within the refrigerator metacontainer type.



Scan Container Bar Codes

After setting up metacontainer types and metacontainers, select **Sample Management** or **Sample Transfer** from the **Tasks** navigation menu. Copia provides a unique graphical display of the containers to be stored and the metacontainers in which they will be stored. You can elect to use a bar code scanner to quickly and easily place containers into storage positions.

More Options for Samples

In the **Manage Samples** navigation menu, select **Sample Management** to review the existing metacontainers and their corresponding information. From this page, you can click on the container and select a variety of actions or inquiries, such as viewing the metacontainer details, viewing history, or selecting to transfer, dispose, or edit the container. Additionally, you can create a manifest or print labels.

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Transfer	Container ID	Container Type
Transfer	2018024-GOLD-000	Tube Rack
Transfer	2018024-GOLD-001	Tube Rack
Transfer	2018026-GOLD-002	Tube Rack
Transfer	2018032-GOLD-003	Tube Rack
Transfer	C18029002	Gold/SST
Transfer	C18029003	Gold/SST
Transfer	C18029004	Gold/SST
Transfer	C18029005	Red Top
Transfer	C18038001	Gold/SST

Use a bar code scanner or manually click the **Transfer** button on the **Sample Transfer** page to view all eligible items to be stored on a **Transfer Worklist** panel on the left side of the page, along with a graphical representation of the destination container on the right side of the page.

See “Save Time & Improve Organization” on page 2.

From within this page, you can also create metacontainers or perform bulk actions on multiple existing metacontainers at a single time. The bulk actions are a convenient way to document, edit, transfer, or dispose of many samples at once.

Sample Tracking Benefits

Integrating Sample Tracking functionality into the existing Copia application allows laboratories to electronically track laboratory samples throughout their entire lifetimes. From anywhere within the Copia application, you can view sample or container history, ensuring you always have a log of item transfers.

Click a container ID to select a variety of actions or inquiries.

Position	Row	Column	Container ID	Container Type	Description	Temperature	Testing Host
1	1	A	C18026001	Gold/SST	Tube #1	Refrigerate	OSC Training Lab
2	1	B	C18026002	Gold/SST	Tube #1	Refrigerate	OSC Training Lab
3	1	C	C18029001	Gold/SST	Tube #1	Refrigerate	OSC Training Lab
4	1	D	C18029003	Gold/SST	Tube #1	Refrigerate	OSC Training Lab
5	2	A	C18029004	Gold/SST	Tube #1	Refrigerate	OSC Training Lab

View or print the sample or metacontainer transfer history from the contextual pop-up that displays when you click a sample or container ID.

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If you have any questions or suggestions, please contact our publishers, Megan Stanage and Sarah Goguen, or editor Kerry Foster, at (800) 856-1948.

View the newsletter online at: www.orchardsoft.com/newsletters.

For more information on Sample Tracking, Copia's newest module, visit Orchard Resource Central or contact your Account Executive at **(800) 856-1948**. 🍏

Orchard Copia Advanced User Training Course

The Orchard Training department is pleased to announce a new course offering: Orchard® Copia® Advanced User. This course is considered advanced-level training. It is intended for users familiar with Copia. It is highly recommended that participants complete the Copia Administrator course or have significant product knowledge prior to attending this training.

Copia Advanced User Course Description

This course is for customers who are existing Copia users. The course is a combination of theory and hands-on exercises utilizing or troubleshooting Copia.

You will learn about:

- Advanced ordering
- Sample management
- Routing
- Advanced result delivery
- Fixing order issues
- Fixing HL7
- Data mining
- System performance
- New features in Copia

At the end of each day, there is reserved time for a review session. You can ask questions about Copia in general, in addition to any unresolved questions covering the information presented throughout the day.



Methods of Instruction

The Orchard Copia Advanced User training course utilizes a combination of classroom presentations, laboratory exercises, knowledge checks, and troubleshooting scenarios. Upon completion of the course, attendees will receive a certificate of completion.

P.A.C.E.® Accreditation/Contact Hours

This program has not yet been approved by the ASCLS P.A.C.E.® program; however, it has been submitted and we anticipate it being approved for 16.0 contact hours.

Registration & Scheduling

Limited seating is available for each class. Scheduling of training will occur upon receipt of payment or with a signed purchase order and a copy of the quote for training you will receive.

Course Schedule

- September 18-20, 2018
- November 13-15, 2018 🍎

Spotlight On: Audrey Lorraine, Director of Documentation & Communication



Audrey Lorraine, Director of Documentation & Communication, has been with Orchard Software for 18 years. Audrey began as Orchard's first technical writer, creating all in-program product documentation. Through the years, she has also served as the company's webmaster and newsletter editor.

Audrey's Team

As the company has grown, so has the team producing these projects. The Documentation & Communication department now includes 10 members responsible for keeping the online product help up to date, as well as managing Orchard's online presence and video resources.

Audrey attended Purdue University in West Lafayette, Indiana, where she earned a B.A. in Communication. She and

her husband, Dean, enjoy ballroom dancing together, as well as embarking on road trips around the country.

Audrey's Q&A

Favorite TV show?

I am unashamedly a fan of the TV show *Survivor*. I have seen every season at least once.

What is the coolest job you've ever had?

I worked one summer at a local AM radio station, where I got to do a little of everything: answer phones, record commercials, read the news, and conduct live remote broadcasts.

What is the most amazing thing that has happened to you recently?

Last year, my travels led me to get to meet both magician David Copperfield and President Jimmy Carter. 🍎

Orchard Sponsors POC Group Webinars & Presents Two of Its Own

Integrated point-of-care testing (POCT), because of its rapid turnaround time, continues to gain traction in value-based healthcare. In addition, it is well-recognized that the quality of POCT is positively influenced by laboratory professional oversight. In light of these facts, and to continue in its efforts to develop software tools that help the laboratory provide superior patient care, Orchard Software offers Orchard® Trellis™. Trellis is a comprehensive integration and management solution for POCT that is being embraced by laboratories that understand the benefits of properly implemented POCT and want to make sure their organization's POCT management is top quality.

As such, Orchard, along with other vendors with a shared interest in POCT, is sponsoring several POC Group webinars in 2018. The POC Group webinars are produced by Whitehat Communications and are focused on topics of interest to the laboratory and POCT industry. The **free webinar sessions offer P.A.C.E.® credit opportunities** and are given by experts in the lab and POCT market.

Educational POCT Webinar Topics

Below is a table listing the specific webinars that Orchard will be sponsoring for 2018. For a comprehensive list, visit whitehatcom.com/POC_Group_Webinars_2018.htm. You can register for any of the sessions that interest you without being affiliated with the POCT groups. In addition, you can view previous webinars at your convenience.

Date	Time	Topics	Speaker	POC Group
July 19	12 PM EST	Quality Assurance Plans for POCT in a Hospital Setting	Jeanne Mumford, BS, MT(ASCP)	Southwest Florida
August 21	12 PM EST	The Nursing-Lab Relationship in POCT: The Good, the Bad, and the Ugly of Interdisciplinary Teams	Dr. Jim Nichols, PhD	Virginia
September 13	12 PM EST	The Life Cycle of a New POC Test	Jeanne Mumford, BS, MT(ASCP)	New Jersey
October 9	1 PM EST	To Be Determined		Southern California
November 13	12 PM EST	Standardizing Point-of-Care Testing and Harmonizing Workflows Between Hospitals and Ambulatory Locations	Jeanne Mumford, BS, MT(ASCP)	Texas Gulf Coast
December 6	12 PM EST	To Be Determined		Texas Gulf Coast

Orchard Presents Two Webinars on POCT & Trellis

Orchard will also be presenting two of its own webinars on the challenges of POCT and introducing some of the features and benefits of Trellis. Orchard's presenters will be Kim Futrell, Product Marketing Manager, and Nancy Stoker, VP of Product Management. These two webinars will take place on September 18, 2018, at 1 PM EST and October 23, 2018, at 1 PM EST. Registration will be available on the Orchard website and through promotional email closer to each event. If you have questions, please call us at **(800) 856-1948**.

Trellis Offers Solutions for POCT

Orchard's POCT management and integration solution, Trellis, addresses the complexities POC coordinators face in remote oversight of various POCT locations, devices, and operators. As the changes in healthcare increase the value and effectiveness of POCT, there is a greater need within the industry for a software solution that can address the disparities of POCT. Trellis is designed to meet those industry needs.

If you are interested in learning more about Trellis, please contact your Account Executive at **(800) 856-1948**. 🍏



Where in the World is Orchy®?

The last time we saw Orchard Software's famous mascot, Orchy®, he was enjoying a visit to Brussels, Belgium, where he saw the Atomium, an amazing structure comprised of spheres and tubes. It was built for the 1958 World's Fair, but it remains an important landmark, attracting many visitors each year.

Congratulations, Nancy!

Nancy Boschen correctly guessed Orchy's location and has won the drawing for the Orchy prize package.

Orchy Reaches his 50th State

Since his first trip in 2003, our mascot, Orchy, has been to 89 countries and territories, as well as 49 states. Now, he is excited to announce that he recently visited his 50th state!

This adventure took him to a tiny town that was the birthplace of a king. This artist was perhaps known as much for his moves as his music. Orchy reported that he was moved by the trip—in fact, he was all shook up.

If you think you know where Orchy is located, please send your answer to news@orchardsoft.com by Friday, June 29, to be eligible to win an Orchard prize package. 🍏

* Orchy is a trademark of Orchard Software Corporation for installation of laboratory software and technical support services, namely, troubleshooting of computer software problems; maintenance of computer software



25 Years of Growing New Things: Happy Anniversary, Orchard!

We installed our first laboratory information system in Indianapolis, Indiana, in 1993. Since that first installation, we have had the privilege to partner with more than 1,500 laboratories across the country, providing the software and services that help our customers improve patient care.

Orchard's Focus on the Laboratory

As the healthcare industry has continually evolved over the course of our 25 years, we have stood the test of time by constantly improving our software and applying our core values of caring, leadership, focus, responsiveness, and reliability to everything we do.

Orchard Software wouldn't be where it is today without each person's contributions, so we want to take a moment to thank—and celebrate with—the entire Orchard family, including our employees, customers, and vendors. We are excited to continue our journey together to advance the field of diagnostic information systems. Let's see what we can build together. Happy anniversary! 🍏



Website & ORC Changes Coming July 1

As we announced in our last newsletter, there are many exciting changes coming to Orchard's online resources. We will be upgrading the Orchard Resource Center (ORC), launching a new corporate website, and enhancing our product documentation system.

While we can't reveal the new look in full, in this issue, we want to share more details about the upcoming changes and let you know how you can prepare for the transition.

ORC Account Changes

On July 1, we will launch a new ORC portal and upgraded self-service account management tools. Leading up to that date, you will find the information below, as well as additional updates as the date approaches in the "Important: ORC Update Info" section on your ORC homepage, so be sure to visit orc.orchardsoft.com frequently.

ORC User Names & Passwords Will Change

Because we are changing the tools we use to handle account management, **you will need a new account, with a new user name and password, to continue accessing the ORC. The good news is that we will be able to automatically create accounts for many users.** This process will generate and distribute user names and passwords once the updated ORC system is available.

How to See If Your ORC Account Can Be Created Automatically

We will be able to automatically create your new ORC account if all of the following are true:

- **Support Status:** Your facility has an active support agreement with Orchard.
- **Valid Email Format:** Your email address for the current ORC is valid and in a valid format (e.g., name@organization.com).
- **Email Not From a Free Service:** Your email address for the current ORC is not from a free service (e.g., Gmail or Yahoo).
- **Recently Signed In:** You have signed in to the ORC in the last 12 months.

If any of these are not currently the case, contact your Orchard Account Executive or visit the ORC for instructions on how to address these issues in the "Important: ORC Update Info" section of your homepage at orc.orchardsoft.com.

Timing of the Changes

The launch of the updated ORC portal and account management tools will be July 1. However, both the current system and the new system will be available throughout July, so you will have time to make sure your new account is up and running.

The screenshot shows the Orchard Resource Center (ORC) homepage. The top navigation bar includes 'Orchard Resource Center', 'Spaces', 'Questions', and 'Feedback'. The main header says 'Welcome to the Orchard Resource Center'. Below this, there's a 'MY ACCOUNT' section with a greeting 'Hello, Audrey!' and a welcome message. A large red arrow points from the 'MY ACCOUNT' section to the 'Important: ORC Update Info' section on the right. The 'Important: ORC Update Info' section contains text about the upcoming changes on July 1st, including the launch of a new ORC portal and upgraded self-service account management tools. It also mentions that users will need a new account with a new user name and password, but that Orchard can automatically create accounts for many users. Below this, there are links for 'ORC User Names and Passwords Will Change' and 'How to See if Your Account Can Be Created Automatically'. The 'MY ACCOUNT' section also includes a profile picture of Will Renn, his email 'wrenn@orchardsoft.com', and his phone number '(800) 856-1948'. There are also links for 'Account Executive Information' and 'Email:'. The 'Support & Account Tools' section includes icons for 'SUPPORT', 'MY RFMs & SUPPORT TICKETS', 'CUSTOMER CONNECT', and 'ORC HELP & INFO'. At the bottom, there are links for 'Request Upgrade', 'Request Interface', 'ICD & NCD Codes', and 'Full List of Host, Reference Lab, & Instrument Interfaces'.

ORC Account Management Tools

Another change due to our upgraded tools is that each account will need to have an ORC account administrator.

ORC Account Administrators

Users who have been set up as account admins will perform several account functions for other users at their facilities:

- Add user accounts
- Remove user accounts
- Reset user passwords

For more information, see the “Important: ORC Update Info” section on your ORC homepage for details.

Assigning ORC Account Administrators

Because Orchard must designate account administrators in the system, **our account executives have begun reaching out** to confirm who should be the account administrators for your facility. If we have not contacted you yet, feel free to call your Orchard Account Executive at **(800) 856-1948**, or sign in to the current ORC to submit a form with this information. See the “Important: ORC Update Info” section on your ORC homepage for details.

Finding Your ORC Account Administrators

To see who your ORC account administrators are, sign in to the ORC and look at the “My Account” section.

If no administrators are listed yet, feel free to call your Orchard Account Executive at **(800) 856-1948**, or sign in to the current ORC to submit a form with this information. See the “Important: ORC Update Info” section on your ORC homepage for details.

Product Documentation Expansion

As our product documentation and eLearning resources continued expanding, we realized the need to make some foundational changes to our help system. In addition to the ORC portal and homepage changes mentioned above, we are beginning to port our product documentation to the ORC. Once there, our software will link users to this centralized online help location. Orchard® Trellis™ already uses this system, and Orchard® Copia® users will see this change when they upgrade to the January 2018 (or later) release of the software.

We understand that this is a major change to how you access help, but it is setting the stage for us to make some incredible enhancements to the product documentation. Over the coming months, documentation updates will include expanded technical and user manual sections, additional embedded eLearning videos, and enhanced search capabilities.

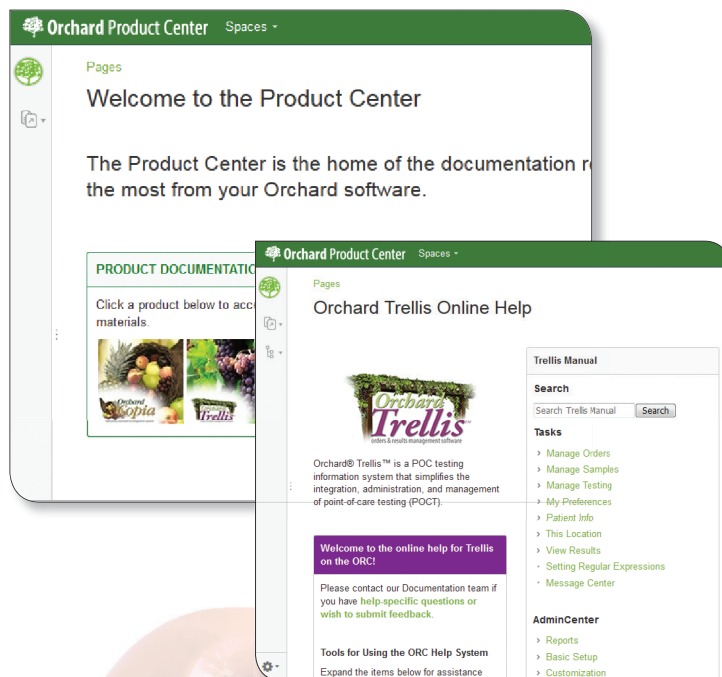
Get ready for the launch!

Sign in to the ORC to verify:

- Your support agreement is active.
- Your email address is valid and not from a free service, if possible.
- An ORC account admin has been assigned for your account.

See your ORC homepage for additional details and help updating your information.

orc.orchardsoft.com



Visit the ORC to view additional details and video tutorials on using the system. As you do so, please email us at documentation@orchardsoft.com to let us know what we can do to make our online product documentation even better. We greatly appreciate your feedback!

See “Website & ORC Changes”
on page 8.

Questions, Our Online Forum, Is Taking a Hiatus

Over the years, we have used a few different systems for user forums. Since we launched the Questions user forum feature several years ago, technology and the way our customers use forums have evolved significantly. We have learned a lot in this time, and we have heard your feedback about how to enhance the experience.

Our team is working on a new and improved user forum that incorporates what we have learned; however, we want to take the time to implement a system that will be useful to the broadest set of our customers. Because work is ongoing, **we will not be moving the Questions system to the new ORC in July.**

We know that this is disappointing news to our devoted Questions users. We apologize and appreciate your patience. We also hope you will be part of the user group that reviews and tests the new forum solution. If you would like to participate, please contact us at feedback@orchardsoft.com.

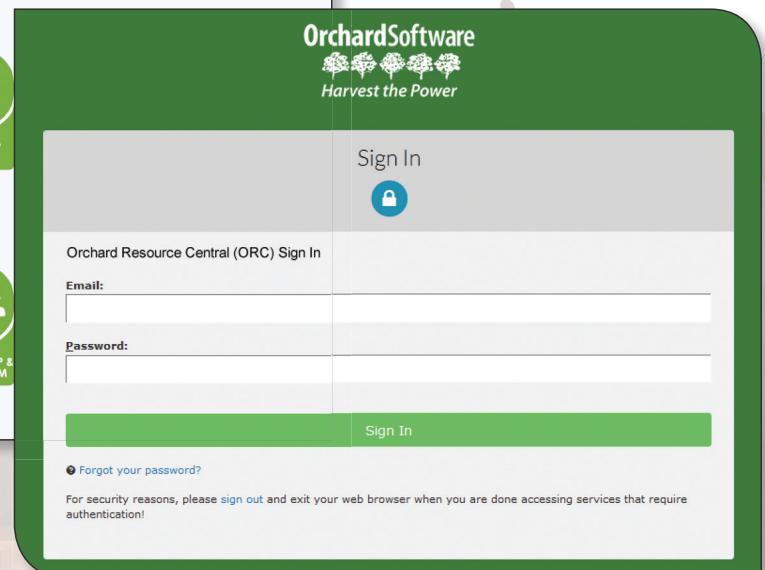
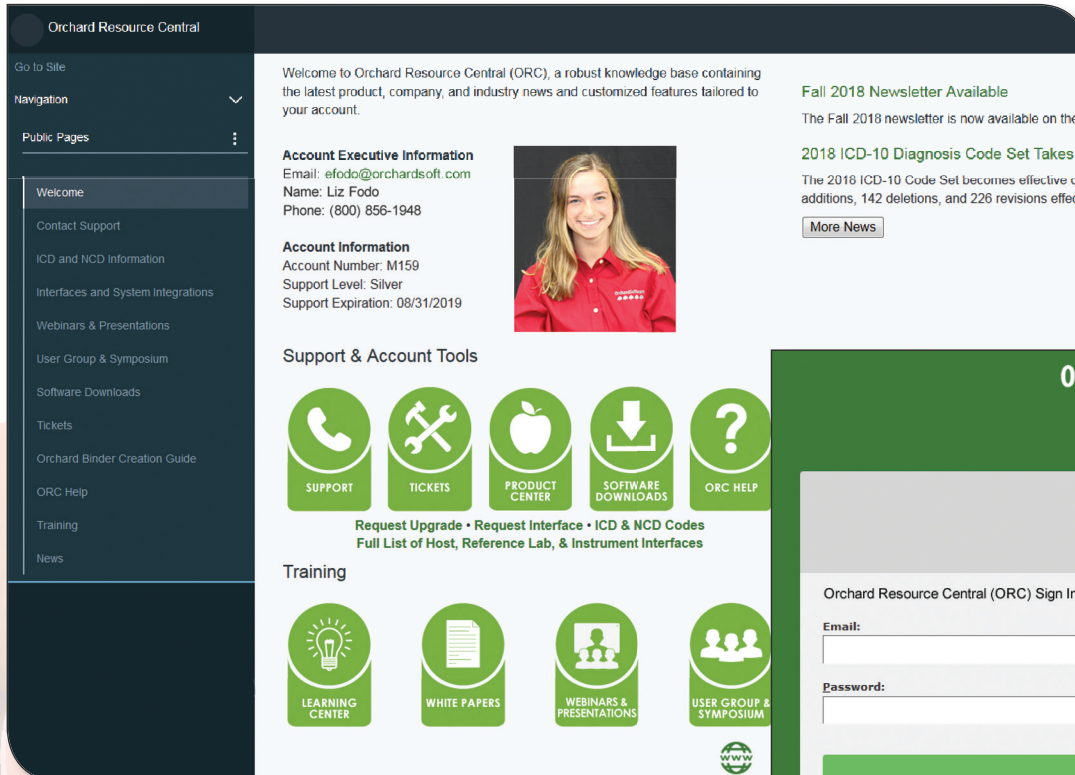
While you wait for the forums to return, if you have questions, we encourage you to visit the Product Center or contact Orchard Software Technical Support at **(800) 571-5835**.



A New Look for Our Website & ORC

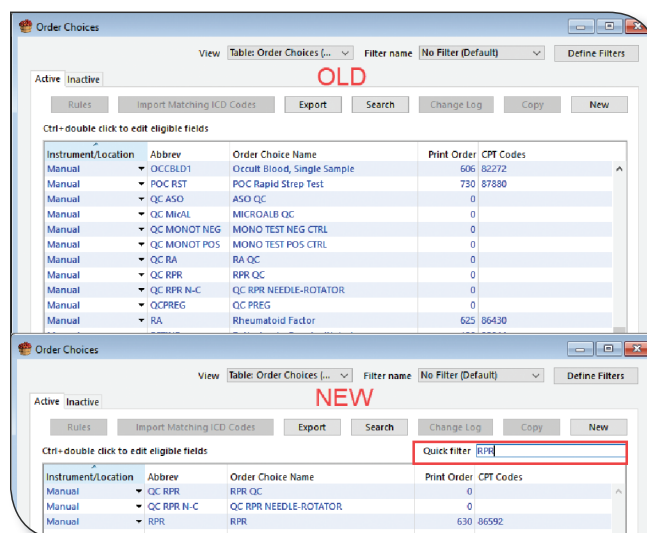
The most obvious changes are the new looks for the Orchard Software website and the ORC. In fact, the changes extend beyond the spruced up online sites, as we are also **introducing updated corporate and product logos.**

You'll have to wait for our anniversary on July 1 to see the new site and logos, but we are eager to share these changes with you, so attendees of this year's User Group & Symposium will get a sneak peek. 🍏

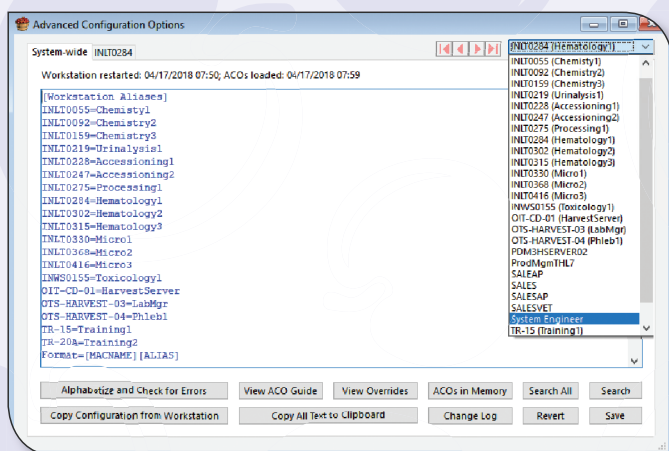


Tech Tip #1 - Advanced Searching in Tables

In June 2017, Orchard® Harvest™ added a **Quick filter** text box as an advanced search feature to all tables on the **Table Setup** window, with the exceptions of **Dictionary**, **Testing Locations**, **Diagnosis Codes**, and **SNOMED Codes**. This feature allows you to quickly sort through records in a table, which saves you time from scrolling and looking through long lists. This feature is activated by default, so no setup is required. 🍏



Tech Tip #2 - Create an ACO Group to Customize a Workstation Alias



(MACNAME), such as “INLT0284.”

This will help ease confusion for system administrators when working with various workstations’ ACOs.

To use this feature, you need to set up two ACOs under the new ACO group header: [Workstation Aliases]. The first entry under the new header determines the workstation’s alias; the format is [MACNAME]=[ALIAS]. Using the example above, you would enter “INLT0284=Hematology1.” The second entry determines the display order of the name and alias on the **Advanced Configuration Options** window drop-down list; the format is either [ALIAS][MACNAME] or [MACNAME] [ALIAS].

Continuing the example, if these ACOs are set:

[Workstation Aliases]
INLT0284=Hematology1
Format=[ALIAS][MACNAME]

the ACO drop-down list for this workstation will appear as “Hematology1 (INLT0284).”

Note that this change will not take effect on each workstation until you close and reopen the **Advanced Configuration Options** window. 🍏

The June 2017 release of Orchard® Harvest™ introduced the option to use Advanced Configuration Options (ACO) to customize your workstation name display in the **Advanced Configuration Options** window.

Pick Your Workstation Names

On the **Advanced Configuration Options** window, workstations are identified in the drop-down list by the IT-assigned workstation name; this is also called the MAC-NAME in the background database structure. These names are not always consistent or user-friendly when referring to a specific workstation. This new ACO allows you to create a user-friendly name, such as “Hematology1,” for identifying the workstation to be displayed next to the IT-assigned name


Tech Tip #3 – Orchard TWAIN


Orchard TWAIN is a desktop application used as middleware between Orchard® Copia® or Orchard® Web AP and your scanning devices, such as a camera or scanner. It does not directly interface with any scanning devices, but acts as an interface between Copia or Web AP and Orchard Utilities. Orchard Utilities is a console application that contains the TWAIN implementation.

About TWAIN

TWAIN is installed on your computer and launched when you sign in to Windows. It launches an HTTP server on the port specified in the **Settings** window. Copia or Web AP will initiate communication on this port. Other than configuring settings, you can perform all other interactions through your browser.

As a tray application, you can interact with TWAIN by right-clicking the icon, which will display a contextual menu with the following options: **Start** (starts the server), **Stop** (stops the server), **Settings** (opens the **Settings** window), **About** (displays the **About** window), and **Exit** (closes TWAIN). You can also double-click the icon to open the **Settings** window. The tray icon appears green when the server is running and appears red when it is stopped.

Start = 

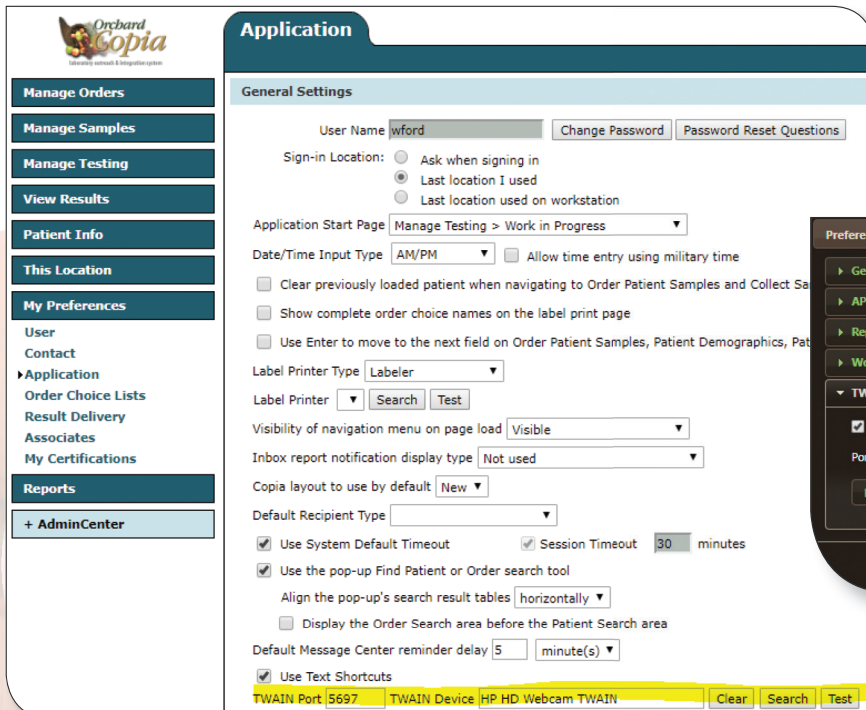
Stop = 

The TWAIN Settings window options:

- **Port:** What port the server listens on. It must match the setting configured in Web AP/Copia.
- **Image Format:** The format to TWAIN will convert the image data to before sending it to the host application.
- **Use Windows Image Acquisition drivers:** Select this checkbox to enable the use of Windows Image Acquisition drivers. When cleared, TWAIN will only work with TWAIN specification drivers.
- **Show confirmation on exit:** Select this checkbox to display a confirmation prompt when closing TWAIN.

Using TWAIN with Copia & Web AP

You need Copia version 7.170214.170315 or later or Orchard Pathology/Web AP version 10.160707 or later to access TWAIN. Please note that while TWAIN is distributed with Copia and Web AP, you can also acquire TWAIN from the Orchard Software Downloads page on Orchard Resource Central (ORC). This way, you can update TWAIN without having to do a full Copia or Harvest upgrade. 🍏



Application

General Settings

User Name: [Change Password](#) [Password Reset Questions](#)

Sign-in Location: ☐ Ask when signing in ☒ Last location I used ☐ Last location used on workstation

Application Start Page:

Date/Time Input Type: ☐ Allow time entry using military time

☐ Clear previously loaded patient when navigating to Order Patient Samples and Collect Samples

☐ Show complete order choice names on the label print page

☐ Use Enter to move to the next field on Order Patient Samples, Patient Demographics, Patient History

Label Printer Type:

Label Printer:

Visibility of navigation menu on page load:

Inbox report notification display type:

Copia layout to use by default:

Default Recipient Type:

☒ Use System Default Timeout ☒ Session Timeout: minutes

☒ Use the pop-up Find Patient or Order search tool

Align the pop-up's search result tables:

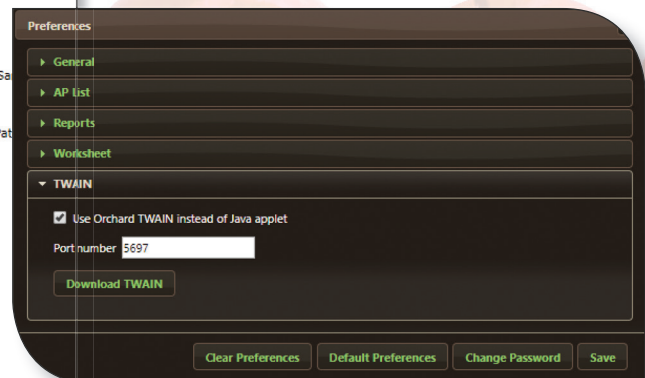
☐ Display the Order Search area before the Patient Search area

Default Message Center reminder delay: minute(s)

☒ Use Text Shortcuts

TWAIN Port: TWAIN Device: [Clear](#) [Search](#) [Test](#)

Setting up TWAIN in Copia.



Preferences

General

AP List

Reports

Worksheet

TWAIN

☒ Use Orchard TWAIN instead of Java applet

Port number:

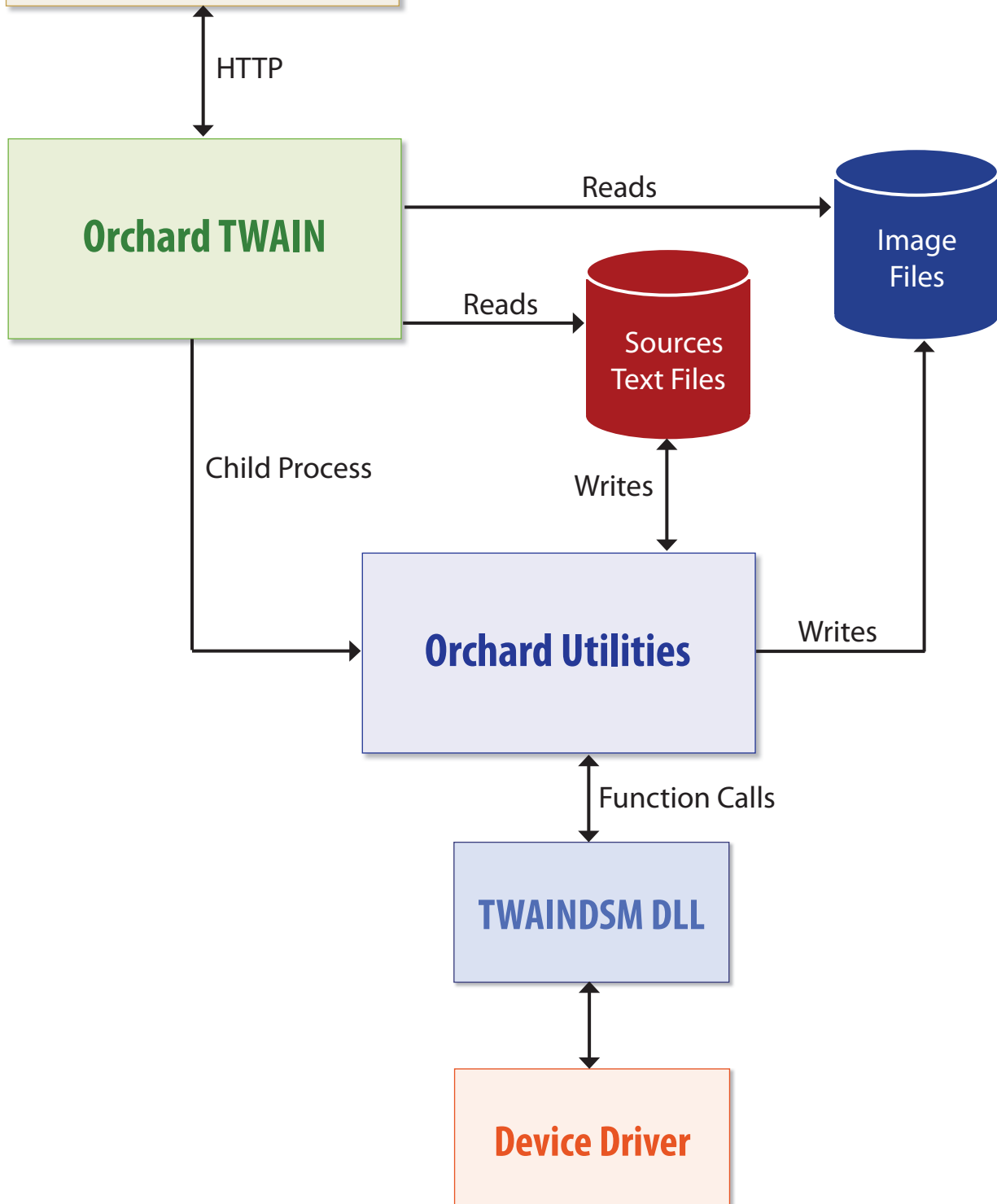
[Download TWAIN](#)

[Clear Preferences](#) [Default Preferences](#) [Change Password](#) [Save](#)

Setting up TWAIN in Web AP.



Twain Diagram with Copia





Website & ORC Changes Coming July 1

2018 Orchard Software Event Calendar

Date	Trade Show/Event	Location
6/2 - 6/5/2018	APHL Annual Meeting	Pasadena, CA
6/20 - 6/21/2018	Orchard User Group & Symposium	Indianapolis, IN
7/29 - 8/2/2018	AACC Clinical Lab Expo	Chicago, IL
10/3 - 10/5/2018	ASCP 2018 Annual Meeting	Baltimore, MD
10/20 - 10/24/2018	CAP18—The Pathologists' Meeting	Chicago, IL
10/22 - 10/23/2018	CAPHLD	Lake Tahoe, CA
11/01 - 11/1/2018	AACC POCT Boot Camp & Beyond	Portland, OR