



BSI Engage

A USER GUIDE

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Accessing BSI Engage

Open your web browser and access the following web address:

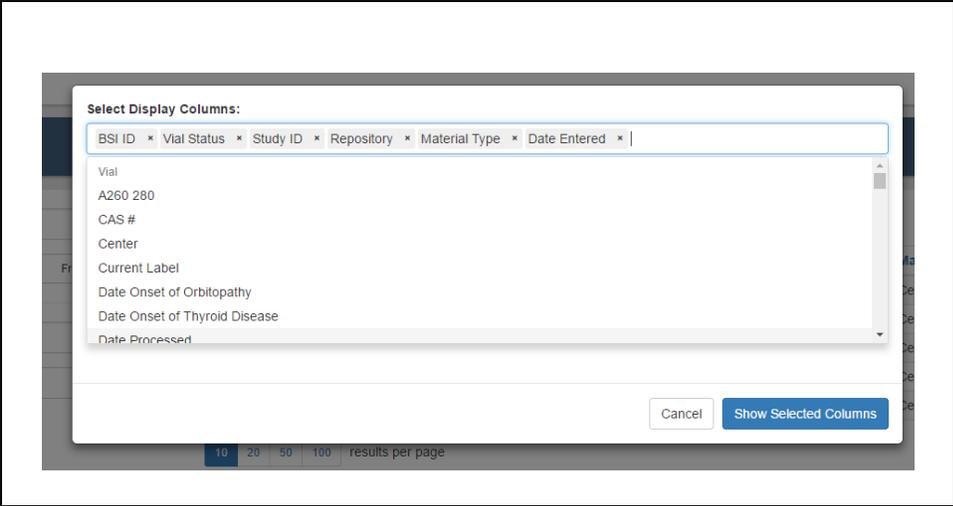
<https://engage.bsisystems.com/kryosphere/>

Enter your username and password, and select “Login”.

Once successfully logged in, you will be taken to your home, or “dashboard” page. This page enables you to navigate to all of BSI Engage’s many functions, as well as adjust your preferences. Any planned downtime or updates will also be listed.

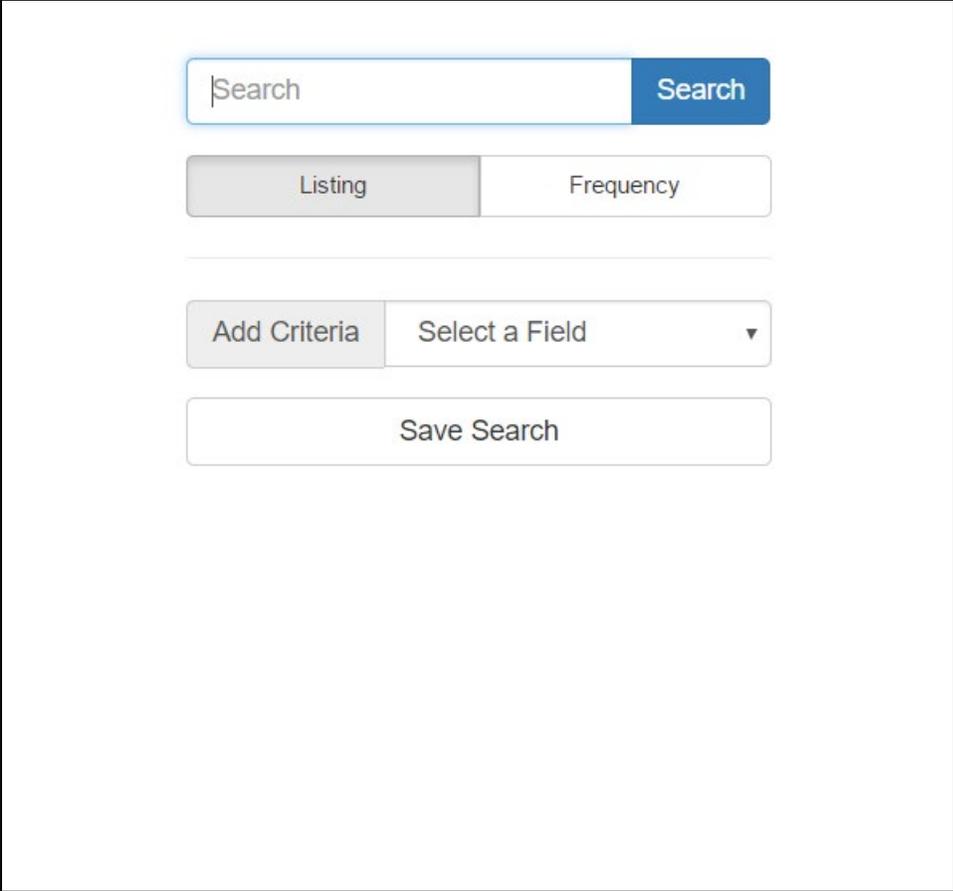
Viewing Your Specimens

	<p>Clicking on the “Specimens” button on the left side of the page will bring you to your main specimen viewing page. From here, you can see a general view of your material, as well as conduct a search with self-specified parameters.</p>
	<p>At the bottom of the page, you will see the bar on the left. Clicking this bar will allow you to manipulate how many specimens you view per page.</p>
	<p>In the upper right corner of your main view, you will find the “Export CSV” button, as well as the “Columns” button. The “Export CSV” button will allow you to export your samples into a PDF. The “Columns” button will enable you to expand the amount of information per specimen that you see.</p>



Selecting the “columns” button will open a popup window on your browser. Through this window, you may scroll through all available columns (not all will be populated for your material), and select which you would like to add to your current view.

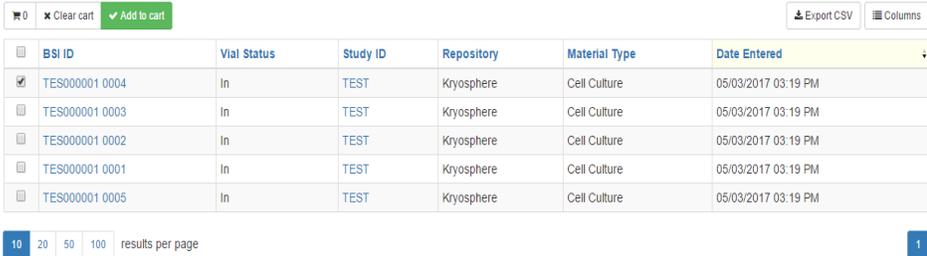
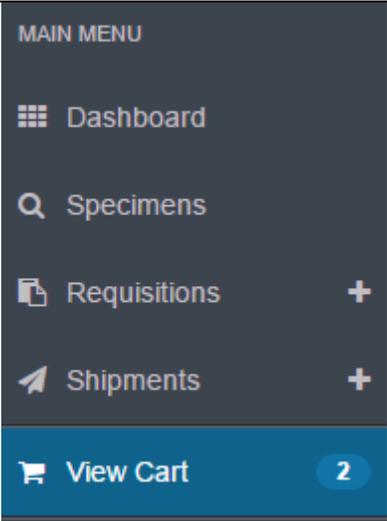
Searching Your Specimens



The searching function on the left-hand side of the screen enables you to conduct a general keyword search through all your material without specifying what column this information is in. If desired, you can also carry out a field specific search, but this is not required. If this will be a frequent search for you, select “Save Search.”

If a specific string of numbers/letters are being searched, for example, a lot number, place the desired information in quotations (“”). This instructs the system to search for only this specific sequence.

Requesting a Shipment or Transfer of Your Specimens

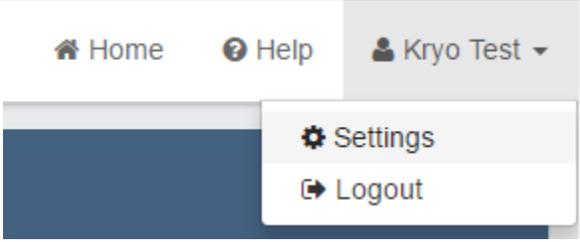
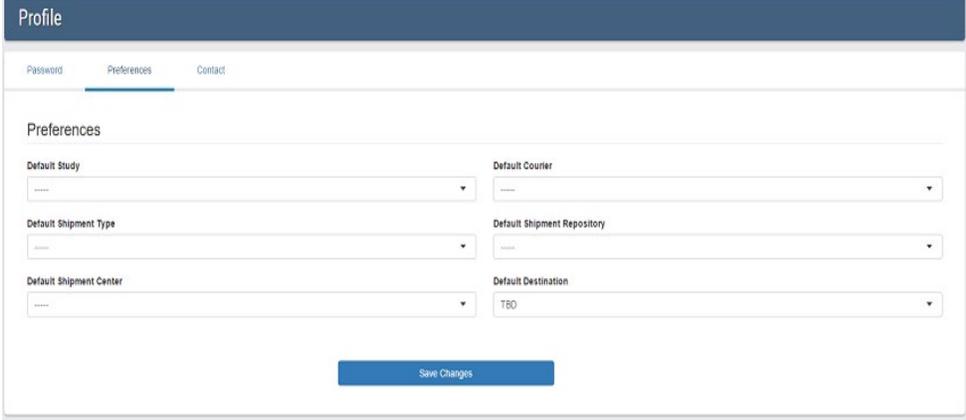
	<p>Once you have located the specimens you would like to request for shipment or transfer, select the checkbox to the left of the “BSI ID”, and select “Add to Cart”.</p>
	<p>Select the “View Cart” button from the menu at the left-hand side of your page.</p>
	<p>You will be taken to your “Specimen Cart” to view your selected items. You have the option to remove unwanted items prior to creating a request. When ready, select “Create Requisition.”</p>

	<p>The “New Requisition” page will open. Complete all portions to the best of your knowledge.</p> <p>These questions will be completed in lieu of a Kryosphere Change of Custody Request Form. When a material request is inputted through Engage, this form is not required.</p>
	<p>You may also reach this page by selecting the “+” sign next to the “Requisitions” tab on the left-hand menu. Selecting the “Requisitions” button will allow you to view a list of previously submitted requisitions.</p>

Submitting an Incoming Shipment

	<p>MAIN MENU</p> <ul style="list-style-type: none">  Dashboard  Specimens  Requisitions + <li style="background-color: #0070C0; color: white;"> Shipments +  View Cart 2 	<p>If you are reporting a shipment that is on its way to Kryosphere, select the “+” next to the “Shipments” option. Selecting the “Shipments” option itself will allow you to view a list of previously submitted shipments.</p>
	<p>New Shipment</p> <p><small>Fields marked with an asterisk (*) are required.</small></p> <p>Notes <input type="text"/></p> <p>Kit Ids <input type="text"/></p> <p>* Repos ID <input type="text"/></p> <p>Shipment Type <input type="text"/></p> <p>Study ID <input type="text"/></p> <p>Internal ID <input type="text"/></p> <p>Suggested Temp <input type="text"/></p> <p>* Center <input type="text"/></p> <p>Courier <input type="text"/></p> <p>Tracking ID <input type="text"/></p> <p>Date Shipped <input type="text" value="06/05/2017"/></p>	<p>The “New Shipment” dialogue will allow you to add a plethora of information, including details on temperature controls, requested storage temperature, courier, tracking ID, and more. You may also upload a shipment manifest prior to submitting your notification.</p>

Adjusting BSI Engage to Fit Your Preferences

 <p>The screenshot shows a user profile dropdown menu with the following items: Home, Help, and Kryo Test. The Kryo Test menu is open, showing 'Settings' (with a gear icon) and 'Logout' (with a door icon).</p>	<p>Some options for customization and password changes are available to you by selecting the “Settings” button under your name.</p>
 <p>The screenshot shows the 'Profile' page with the 'Preferences' tab selected. The 'Preferences' section contains the following fields:</p> <ul style="list-style-type: none">Default Study: [Dropdown menu]Default Counter: [Dropdown menu]Default Shipment Type: [Dropdown menu]Default Shipment Repository: [Dropdown menu]Default Shipment Center: [Dropdown menu]Default Destination: [Dropdown menu, value: TBD] <p>A 'Save Changes' button is located at the bottom of the form.</p>	<p>Under “Preferences”, you may select defaults for shipments to make entry more streamlined.</p>



Need More Help?

<p> Home  Help  Kryo Test ▾</p>	<p>Selecting the “Help” button at the top of your screen at any time will open another tab, and take you to BSI’s own Engage help pages.</p>
<p>biorepmon@kryosphere.com (919) 941-9999</p>	<p>Kryosphere can also be reached directly with any questions or concerns Monday-Friday, 8am-5pm EST.</p>