

# TagLeaf User Guide for PBLaboratories Clients

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# PBL TagLeaf User Guide

Thank you for choosing PBL as your cannabis testing laboratory. We are looking forward to getting started with you! TagLeaf is our Laboratory Information Management System (LIMS). Through TagLeaf, you can create orders, view the status of your active orders, and access all Certificates of Analysis PBL has ever provided to you. The user guide below will walk you through the steps for setting up your TagLeaf portal. If you have any further questions, please contact us through our website.

## Account Creation:

PB Laboratories will send you an email with a sign-up link to create your account in TagLeaf.

- 1) Click on the sign-up button or copy and paste the URL to get started.
- 2) If you are not automatically directed to the registration page, click on “Register Here”.
- 3) Fill out the registration information: Account type, full name, organization (if applicable), email address, phone number, password, and address.
- 4) Click the confirm button on the left side to confirm your information.

## Setting up your admin dashboard:

- 1) On the menu on the left click on “Admin Dashboard”
- 2) Once in the admin dashboard you can change setting associated with your TagLeaf portal.

## Tenant Settings

Here you can enter information about your licenses and time zone.

- 1) Click on “Tenant Settings” on the left side of the screen.
- 2) Fill in the “State License” and/or “Medical License” field with your license number. This is necessary before you can submit orders.
- 3) Set the time zone to the time zone you are working from.

## Manage Users

Here, you can add, remove, and edit users that have access to your TagLeaf portal.

- 1) Click on “Add Users”.
- 2) To add a user, click the blue “Invite User” button in the top right of the screen. A dialogue box will open that will allow you to invite as many users as you would like. Fill out the user’s email address, whatever name you choose for their profile, and select their security role.
- 3) Once you have filled out the information for all of the users you would like to invite, click the blue “Send Invitations” Button.
- 4) To delete a user, click on the red “Remove” button to the right of the user.
- 5) To Edit the security roles of a user, click on the pencil next to their security role in the “Security Roles” column.
- 6) To edit the employee ID of a user, click on the pencil next to their Employee ID in the “Employee ID” column. (This field is optional)

## Security Roles

Here, you can create as many different security roles as you want for your company portal. Listed below are all the permissions that you can assign to security roles in any combination you choose. You can find information on all of our security permissions starting on page 4 of this document.

- 1) Click on “Security Roles”
- 2) To create a security role, click the green “+Add Role” button in the top right of the screen.
- 3) To edit a security role, click on the blue pencil next to the name of the security role.
- 4) A dialogue box will open that will allow you to rename or delete the security role you are editing.

## Manage Addresses

Here, you can add, edit, view, and delete addresses associated with your account.

- 1) Click on the “Manage Addresses” tab in the menu on the left.
- 2) To add a new address, click the blue “Add New” button in the top right of the screen.
- 3) Fill out all of the information associated with the account and then click “Save”.
- 4) To view the information associated with an address, click on the eyeball icon to the right of the address.
- 5) To edit the information associated with an address, click on the pencil icon to the right of the address.
- 6) To delete an address, click on the trash can icon to the right of the address.

Below is a quick summary of each security role and what a user will have access to if they are granted it.

## Security Settings Descriptions

Below is a description of the permissions a user gains from each security setting.

### General Settings

“All Abilities” – This will grant the user all security abilities available.

### COA Settings

“Full access to coas” – This will allow the user to list and view COAs.

“List COAs” – This will allow the user to access a list of all COAs in your portal.

“View COAs” – This will allow the user to view any COA in your portal.

### Sample Submission Settings

“Full access to sample submissions” – This will allow the user to list, view, and create samples.

“List Sample Submissions” – This will allow the user to view a list of all samples in your portal.

“View Sample Submissions” – This will allow the user to view the details for sample submissions.

“Create Sample Submissions” – This will allow the user to create sample submissions.

### Security Role Settings

“Full Access to Roles” – This allows a user to edit and assign security roles.

“Edit Roles” – This allows the user to edit the permissions for security roles.

“Assign Roles” – This allows the user to assign roles to users.

### User Settings

“Full access to users” – This allows the user to invite, remove, and edit users.

“Invite Users” – This allows the user to send invitations for users to join your portal.

“Remove Users” – This allows the user to remove other users from your portal.

“Edit Users” – This allows the user to edit information for other user profiles.

### Even Schedule Settings (We will not be using these settings)

### Order Settings

“Full Access to Orders” – This will allow the user to view lists of orders, view individual orders, edit orders, and create orders.

“List Orders” – This allows the user to view a list of all orders in your portal.

“View Orders” – This allows the user to view details for individual orders.

“Create Orders” – This allows the user to create new orders in your portal.

“Edit Orders” – This allows the user to edit existing orders in your portal.

### Sample Manifest Settings

“Full Access to Sample Manifests” – This allows the user to view a list of all sample manifests in your portal, view details for individual sample manifests, create new sample manifests, edit existing sample manifests, and delete existing sample manifests.

“List Sample Manifests” – This allows the user to view a list of all sample manifests in your portal.

“View Sample Manifests” – This allows the user to view details about individual sample manifests.

“Create Sample Manifests” – This allows the user to create new sample manifests.

“Edit Sample Manifests” – This allows the user to edit existing sample manifests.

“Delete Sample Manifests” – This allows the user to delete existing sample manifests.

### SKU Settings

“Full Access to SKUs”/“List SKUs” – Both of these settings allow the user to view a list of tests and packages that are offered by PBL.

### Address Settings

“Full Access to Addresses” – This allows the user to view a list of all addresses in your portal, add new addresses, edit existing addresses, and delete existing addresses.

“List Addresses” – This allows the user to view a list of all addresses in your portal.

“Create Addresses” – This allows the user to add new addresses to your portal.

“Edit Addresses” – This allows the user to edit existing addresses.

“Delete Addresses” – This allows the user to delete addresses from your portal.

## Laboratory Dashboard

Here, you can get an overview of the samples you have submitted to PBL, their current statuses, and sample turnaround time.

**Total Samples Submitted:** This will display the total number of samples you have submitted to PBL, along with a breakdown of how many are compliance and QA.

**Samples Currently in Progress:** This will display how many of your samples are currently being processed by PBL.

**Average Turnaround Time:** This will display the average number of days it has taken PBL to provide you with results based on all samples submitted.

### Place a New Order Button

Clicking this button will take you to the order creation page. More information on placing an order can be found on page 7 of this document.

### Recent Samples

This box will display your recent samples and their statuses. You can change the date range for samples displayed by clicking on the date range at the top of the Recent Samples box. You can change the kind of samples displayed by clicking on the Kind: "All" "Compliance" and "QA" buttons at the top right of the sample box. Below that, you can change the status of displayed samples by clicking the Status: "All", "Completed" and "In Process" buttons.

The recent samples box will display all samples that match your selections. You will be able to see sample name, type of matrix, test type, lab code, batch code, status, quantity of sample provided, and any actions associated with a sample.

You can export this list as a .csv file by clicking on the yellow "Export" button at the bottom left of the box.

By clicking the blue "View all completed" at the bottom right of the Recent Samples box, you can view your completed samples.

### Recent Orders

In this box, you can view your recent orders with PBL. You can change the date range for samples displayed by clicking on the date range at the top of the Recent Orders box. You can also export and view all orders using the buttons at the bottom of the box.

## Placing Orders

There are multiple routes to the ordering page:

- 1) From the Dashboard, click the blue “Place a New Order” button on the top right of the screen.
- 2) In the black menu on the left side of the screen, click the “Orders” tab. From here, click the blue “Place a New Order” button on the top right of the screen.

## Ordering Page

The ordering page allows you to enter as many samples as you would like in one order. The steps to completing an order are as follows:

- 1) Make sure your address and client information are correct at the top of the page
- 2) If your address is not correct, click on the grey pencil button beneath the address.
- 3) Select the correct address from the dropdown menu and click “Update”
- 4) If the correct address is not listed, add a new address in the admin dashboard. Instructions for this can be found on page 3 of this document.
- 5) Enter your sample information:
  - a. Enter the sample name in the “Sample Name” box
  - b. Enter the cultivar (strain) in the “Select cultivar” box. If it is not listed, you can add a new cultivar by typing the new name into the box.
  - c. Select your license(s) under the “Licenses” header using the dropdown boxes. If your license is not listed, instructions on adding a license can be found on page 2 of this document.
  - d. Select your analysis type under the “Analysis Type” header. Selecting compliance will include all tests required by New Mexico regulations and provide you with a CoA which will allow your product to be sold as long as it passes. QA (Mock Compliance) will simulate a compliance test but will not qualify your product for sale. QA will not allow your product to be sold. It is intended for quality assurance purposes. You can select any number of tests you would like with QA.
  - e. Select your sample type in the “Select Matrix” dropdown under the “Sample Type” header. If your sample is a concentrate, select the subtype in the “Select subtype” dropdown box.
  - f. Select whether your sample is cannabis or hemp derived in the “Cannabis” dropdown box.
  - g. Enter the size of your batch in the “Batch Qty” box under the “Quantity” header. Select the units in the adjacent dropdown box.
  - h. Enter the amount of sample you submitted to PBL in the “Sample Qty” box and select the units.
  - i. Select the tests you would like to be run on your sample using the checkboxes to the right of the sample information. A compliance sample will automatically have the required tests selected, but you can still add additional tests.



- j. If you are entering multiple samples that are similar, you can use the copy and paste buttons at the far right to copy the sample information into another sample slot. This will save a lot of time, but make sure each of your samples is unique.
- k. Enter any additional dropoff information in the “Dropoff information” box at the bottom of the page.
- l. You can add any additional notes for the lab in the “Notes” section.
- m. If you have a sampling plan you would like to share with the lab, enter it in the “Sampling Plan” box.
- n. Click the blue “Review and Finalize” button at the bottom right of the page.
- o. On the review page, make sure your sample information is correct.
- p. Once you have reviewed the information, digitally sign your name in the “Signature” box and type it in the “Print name” box.
- q. Enter your billing information in the “Client Billing Info” section.
- r. If your shipping address is the same as billing, you can click the “Same as Billing” box. Otherwise, enter your shipping address in the “Client Shipping Info” section.
- s. Click the blue “Finalize Order” button at the bottom right of the page.
- t. A popup window will appear. If you are ready to finalize your order click the green “Proceed” button.

## Orders Page

To get to the Orders page, click on “Orders” in the menu on the left side of the screen.

On this page, you can search for orders in the search window, place new orders, view chain of custody information, delete orders, and view invoices.

To edit an order that has not been dropped off yet, click on the pencil to the right of the order. Orders cannot be edited once they are dropped off.

To delete an order that has not been dropped off yet, click on the trash can to the right of the order. Orders cannot be deleted once they are dropped off.

To view chain of custody information for a sample that has already been dropped off, click on the chain button to the right of the order.

To view an invoice for an order, click on the invoice button to the right of the order.

## Samples Page

To get to the samples page, click on “Samples” in the menu on the left side of the screen.

On this page, you can search and filter samples based on their compliance type, matrix, and status. If you want to download COA pdfs of samples, click on the white box to the left of each sample you would like a COA for, click on the “Select Mass Action” box, and select “Download COA PDFs”. After this, press the blue “Go” button to the right.

You can export all samples shown on this page as a pdf or csv file. To do so, click on the orange “Export Table” button at the top right of the screen and select the type of file you would like to create. The file will automatically download.