Matcher Version 4.6 – October 2017
Release Notes

Overview – what is this release for?

This release provides an optional update to the Matcher labels providing **uniquely barcoded** labels **allowing you to match specific items**, not just specific patients.

We also have a new cryo label sheet available which adds PCR tube labels for PGS and PGD (in addition to the existing labels for straws and vials).

There are also updates to allow you to edit freeze items, a **Next** button when witnessing on the Pocket Matcher to take you straight to the next procedure for the current patient and icons to show which device to use for each procedure.

There are also some smaller functionality enhancements and minor updates. These are all detailed below.

This is an update to the Matcher database, PC application, Pocket Matcher application and labels.

What is included in this release?

1. Unique barcodes
2. Ability to match cryo items
3. PGS/PGD labelling
4. Editing freeze/cryo items (plus audit reports)
5. Witnessing device icons
6. Next button on Pocket Matcher
7. Single ID card per patient option
8. Separate name field for labels
9. Label layout and button updates
10. Cycle timer starts from first match
11. Ability to add notes to batches / lots
12. Update to procedure photo album
13. New reports
14. Added partner name to 4x 60mm laboratory labels
15. Cycles remaining alert update
16. Patient name check
17. Forget last user
18. 'Move procedure' buttons on the Process Map screen
19. New support portal
20. Various small changes and bug fixes

1. Unique barcodes

There is now an option available to use unique barcodes. This provides a completely unique barcode for each labelled item (both cryo and non-cryo) which is different to any other Matcher barcode in any clinic. This provides the following benefits:

- Allows you to match specific cryo items, so, for example, you can match PCR tube #2 to straw #2;
- Ensure you don't accidentally scan the same item twice in a procedure;
- Allows items to be passed between clinics using Matcher with lower risk.

As part of this feature, we've also removed the label print preview. Instead of this unnecessary step, the labels will be sent straight to the printer when you click the **Print…** button.

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Unique barcodes also provide lots of opportunities for further features, which we're currently working on.

By default, unique barcodes are NOT enabled. If you would like to use them, please contact us to activate this option.

2. Ability to match cryo items

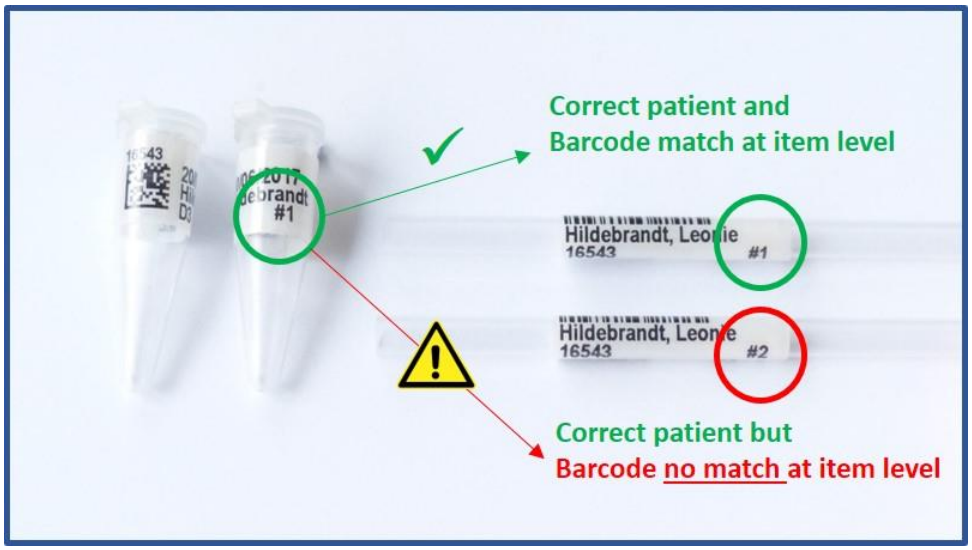
Where you choose to use unique barcodes, we've added some further functionality to allow you to match specific items in a cryo freeze as follows:

You can:

- Match straw label #3 to PCR label #3 for the same freeze;
- Match several straw labels for the same freeze to a dish (e.g. for loading straws);
- Match any label from a donor or partner to any label for the patient.

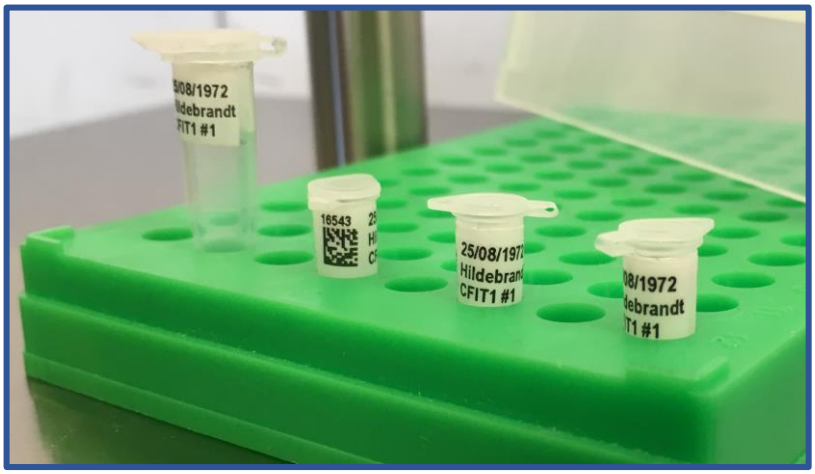
You cannot:

- Match straw label #3 to PCR label #4 for the same freeze;
- Accidentally scan the same straw twice (or more times) when scanning several straws in the same procedure;
- Match items from more than one freeze for the same patient.



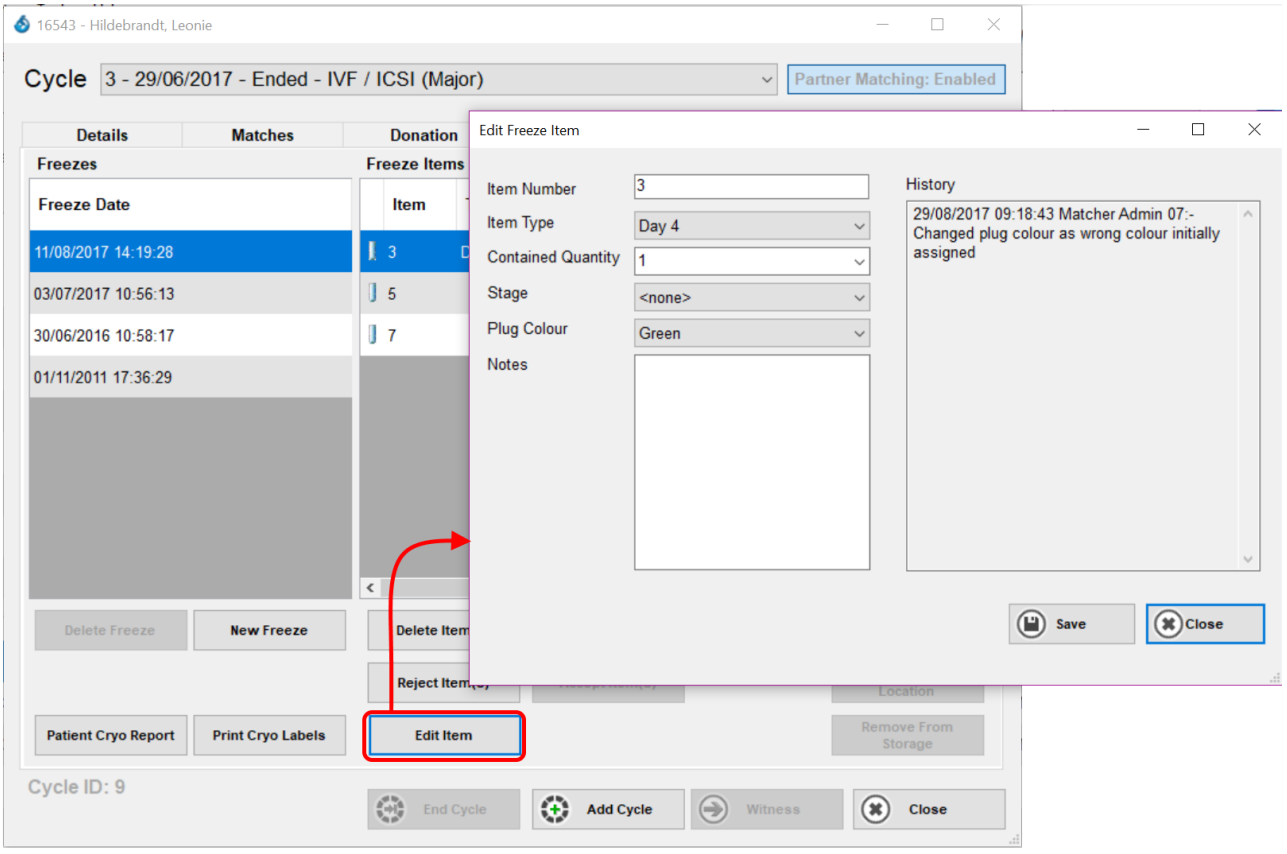
3. PGS/PGD labelling

Developed in partnership with genetics labs, we have a new cryo label sheet available containing PCR tube labels (in addition to the standard straw and vial labels). These curved labels (to fit tapered PCR tubes) are suitable for 0.2mL and 0.5mL tubes and are self-laminating. The labels contain a 2d barcode (unique if that option is required) and patient / item information. These labels are already in use in genetics labs to identify samples throughout the PGS and PGD processes, and have been validated for the amplification process and storage.



4. Editing freeze/cryo items

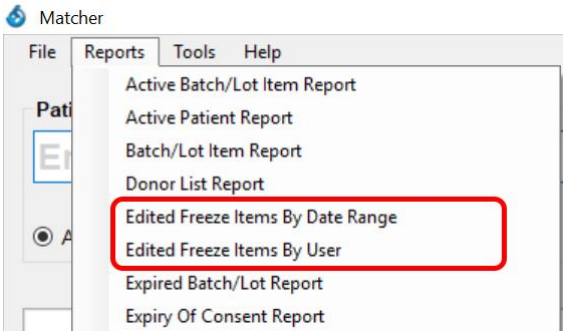
We had several requests to allow cryo items to be edited after being created, so we've added this functionality for all clinics. You can edit cryo items from the **Patient** > **Cryo** screen by double clicking on a cryo item, or selecting one and clicking the **Edit Item** button. You will then see the screen below which allows you to edit the item details (including the item number).



Note that you can also add time- and user-stamped notes to cryo items, which cannot subsequently be overwritten.

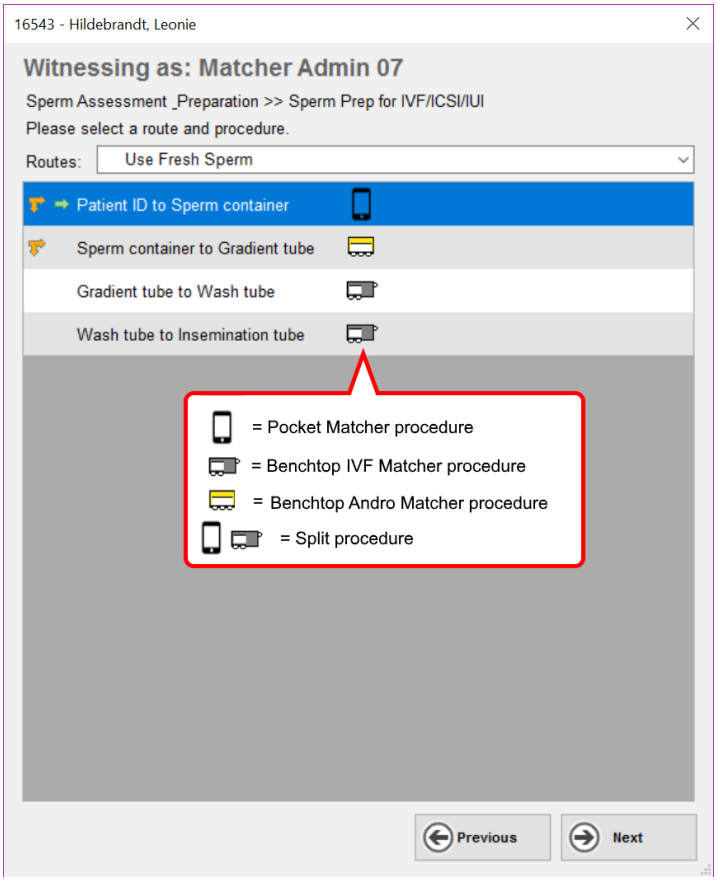
Good to know…

All changes made to cryo items are audited, including who made the change, when and what they changed. There are two new reports available on the **Reports** menu allowing you to view all changes made to cryo items in a specific date range or by a specific user.



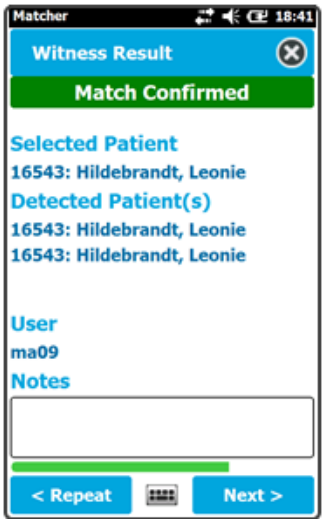
5. Witnessing device icons

We've added some icons when witnessing using the Benchtop Matcher to help you easily identify what device is required for each witnessing step.



6. ‘Next’ button on Pocket Matcher

We’ve added a **Next** button on the Pocket Matcher to allow you to progress to the next witnessing step (procedure) when you’ve completed a witness step (where relevant). This saves a lot of button clicks when you want to carry on witnessing for the same patient.



7. Single photo ID card per patient option

We received feedback from some clinics saying that they’d like to have a photo ID card per individual patient (rather than an ID card showing both patient and partner). This is a configurable option for each clinic.

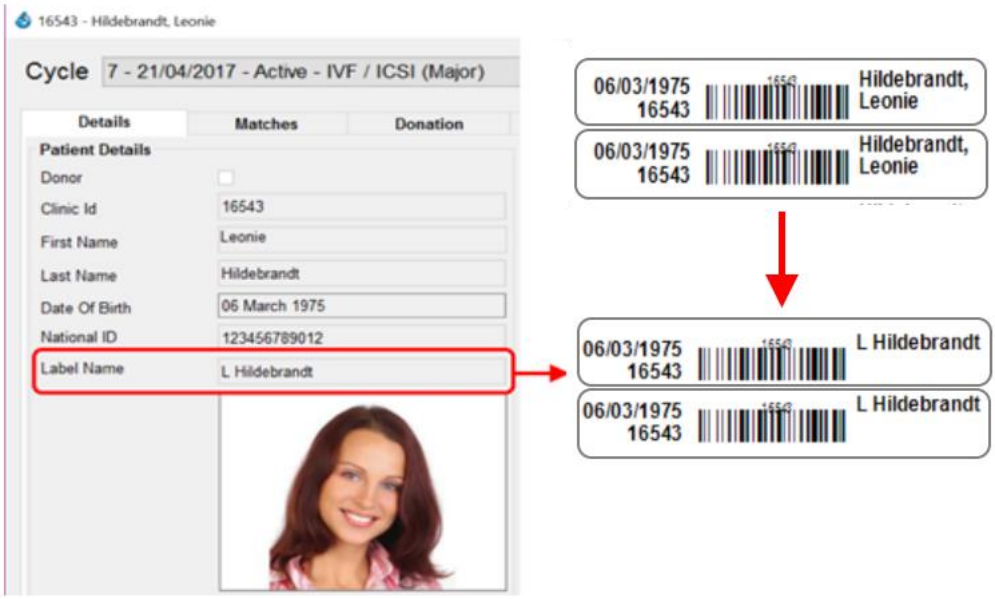
Administrators can enable this option as follows : click on **Tools** > **Settings** and then double click the **Enable Solo ID Card** setting. Change **false** to **true** and click **Save**. Then click **Save** on the **Settings Edit** screen too.

You can also add some custom text to the blue bar shown at the top of the ID card. You could use this to add your clinic website address or strapline, for example.

Administrators can add this text as follows: click on **Tools** > **Settings** and then double click the **ID Card text** setting. Enter the text you’d like to appear on your ID cards (we recommend a maximum of 35 characters) and click **Save**. Then click **Save** on the **Settings Edit** screen too.

8. Separate name field for labels

We had feedback from a few clinics stating that they wanted to put a different format of patient name, or a shortened name on their labels, particularly for very long names. We've accommodated this by creating an additional field called **Label Name** in which you can add, for example, a shortened name for your patient to print on the labels. This is an optional field that can be switched on if required, but stays hidden if not. In any case, if the field is blank or not in use, the patient name will appear on the labels in the usual format, for example *Hildebrandt, Leonie*.



Good to know…

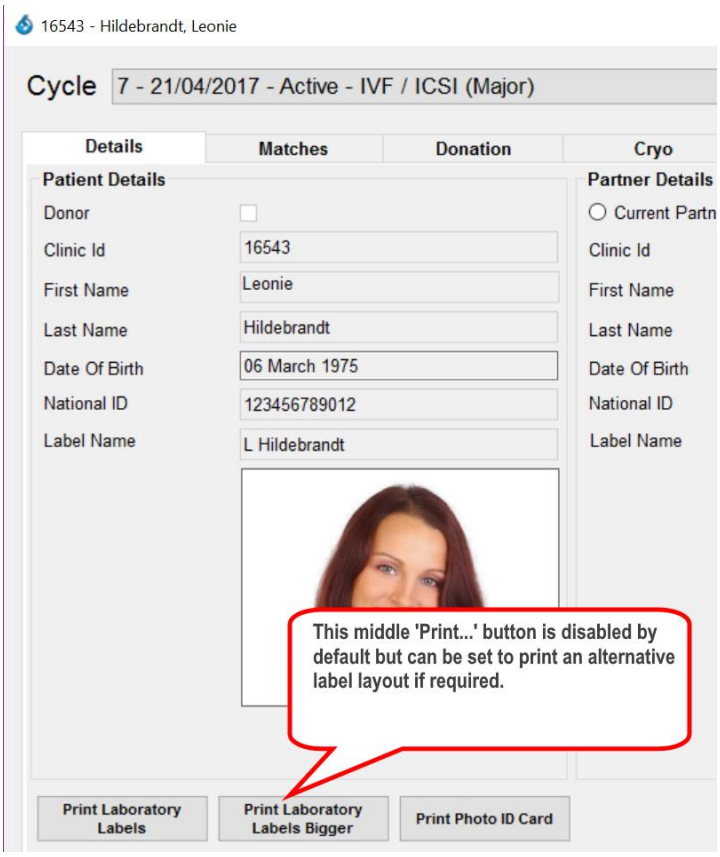
We can pre-populate this field with each patient's first name and surname if needed (e.g. Leonie Hildebrandt) which you can then edit further if required. Contact our Support Team at matcher@imtinternational.com to request this.

Administrators can enable the **Label Name** field as follows : click on **Tools** > **Settings** and then double click the **Enable Label Name** setting. Change **false** to **true** and click **Save**. Then click **Save** on the **Settings Edit** screen too.

9. Label layout and button updates

We have updated the label layouts available to remove some of the older, less user-friendly layouts and have made the text on all layouts as easy-to-read as we can.

We have also re-purposed the **Print Diagnostic Labels** button to give the flexibility to print a different lab label if you wish. By default, this button is disabled, but can be enabled if required.

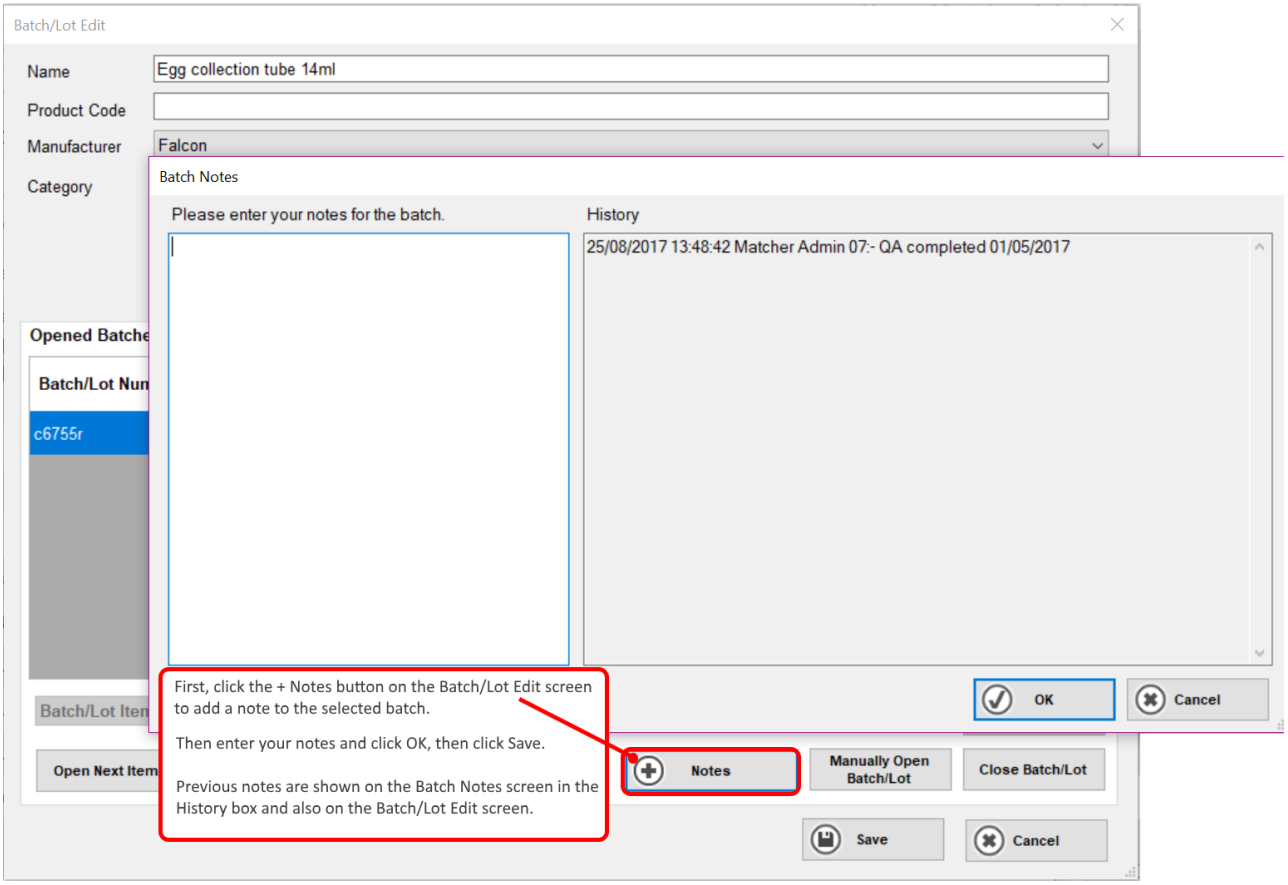


10. Cycle timer starts from first match

Previously cycles would end a certain number of days after the cycle had started (usually 10). Based on feedback from clinics, we have changed this so that cycles will now end a number of days *after the first match*. This means that you can open cycles in advance of treatment to allow you to prepare for patients, without having to worry about when the cycle might end.

11. Ability to add notes to batches / lots

You can now add notes (or comments) to batches once they've been saved. This allows you to record any additional information about the batch you wish. See next page.



12. Update to procedure photo album

We have updated the procedure photo album to ensure that any matches with material labelled under the partner's ID are shown. Previously these photos were not included in the report. We've also added a 'Material anonymised' stamp where a match has been completed with donor material. This shows there has been a match, but does not reveal any donor details to ensure anonymity (previously it did not show anything for donor matches).

13. New reports

We have created several new reports allowing you easier access to some of the information held in Matcher:

Report name	Location	Description
Manual entries report	**Reports** menu	Shows all witnessing steps where there was no barcode or the barcode has not been read by the Benchtop Matcher or Pocket Matcher and, instead, the ID has been entered manually. Allows you to specify a date range and/or a specific user to report on.
Edited freeze items by date range	**Reports** menu	Shows all freeze items that have been edited (including their location) and the details that have been changed. Allows you to specify a date range to report on.
Edited freeze items by user	**Reports** menu	Shows all freeze items that have been edited (including their location) and the details that have been changed. Allows you to specify a specific user to report on.
Cycle licence summary	**Reports** menu and **Cycle Licence Summary** screen	Shows the total cycle licences of each type used in the specified date range.
Witnessed procedures summary by user	**Reports** menu	Shows all witness steps performed by a specific user. Allows you to also specify a date range to report on.
All donors and recipients	**Reports** menu	Shows all witnessing steps where a donor has been included in a patient cycle. Allows you to specify a date range to report on.

14. Added partner details to 4 x 60mm laboratory labels

In response to requests from various clinics, we've added the name, ID and date of birth of the partner to 4 of the 60mm laboratory labels.

15. Cycles remaining alert update

We've made the cycles remaining alert configurable so that you can have Matcher alert you when you get to a certain number of cycles. Previously this was set to 20 cycles for all clinics, but you can now set it to alert you at whatever point you want, for example, when you have 30 or 40 cycles remaining.

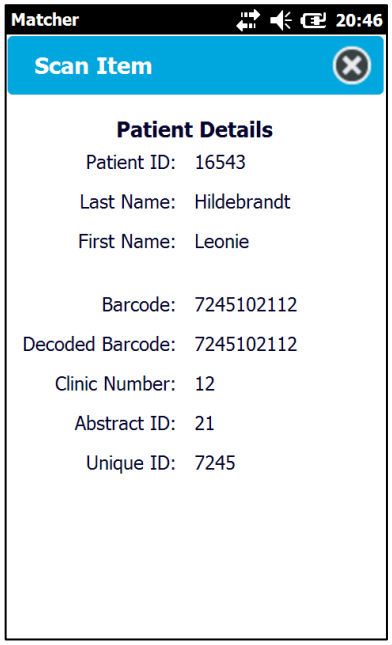
Administrators can update this alert as follows : click on **Tools** > **Settings** and then double click the **Cycle alert count** setting. Change the number as required and click **Save**. Then click **Save** on the **Settings Edit** screen too.

16. Patient name check

We have added a new feature to the Pocket Matcher allowing you to perform a standalone patient name check by scanning a patient barcode. This allows you to scan a barcode and the patient details will be shown to you. You will also see additional details if it's a unique barcode.

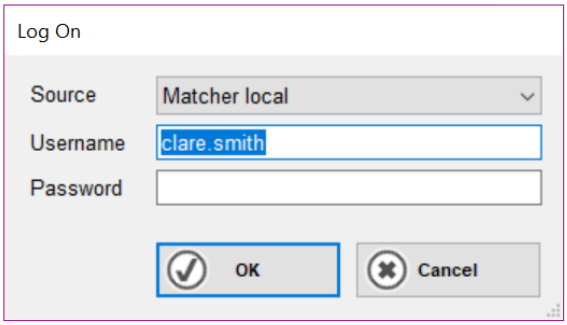
This could be useful if, for example, you are removing an item from cryo storage but you cannot see the label clearly to identify the correct patient name through the liquid nitrogen/vapour. You can use this feature to scan a barcode and check the patient name, without recording a witness step.

To access this facility, click the **Patient Name Check** option from the main screen on the Pocket Matcher. When you scan a patient barcode, you will be shown the details like this:

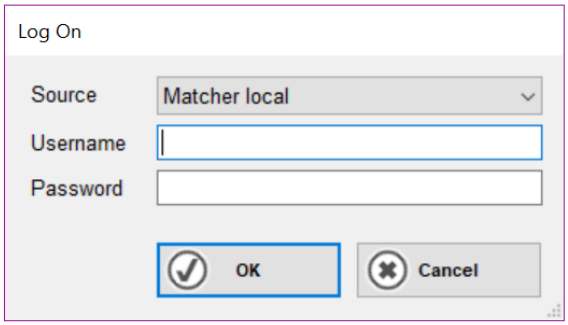


17. Forget last user

Previously Matcher would remember the last user that was logged in and display their name in the **Username** box the next time you launch Matcher. We have added options to allow you to ensure Matcher forgets the last user logged on and leaves the **Username** box blank (on both the PC application and Pocket Matcher) if you prefer.



Remember last Matcher user = true

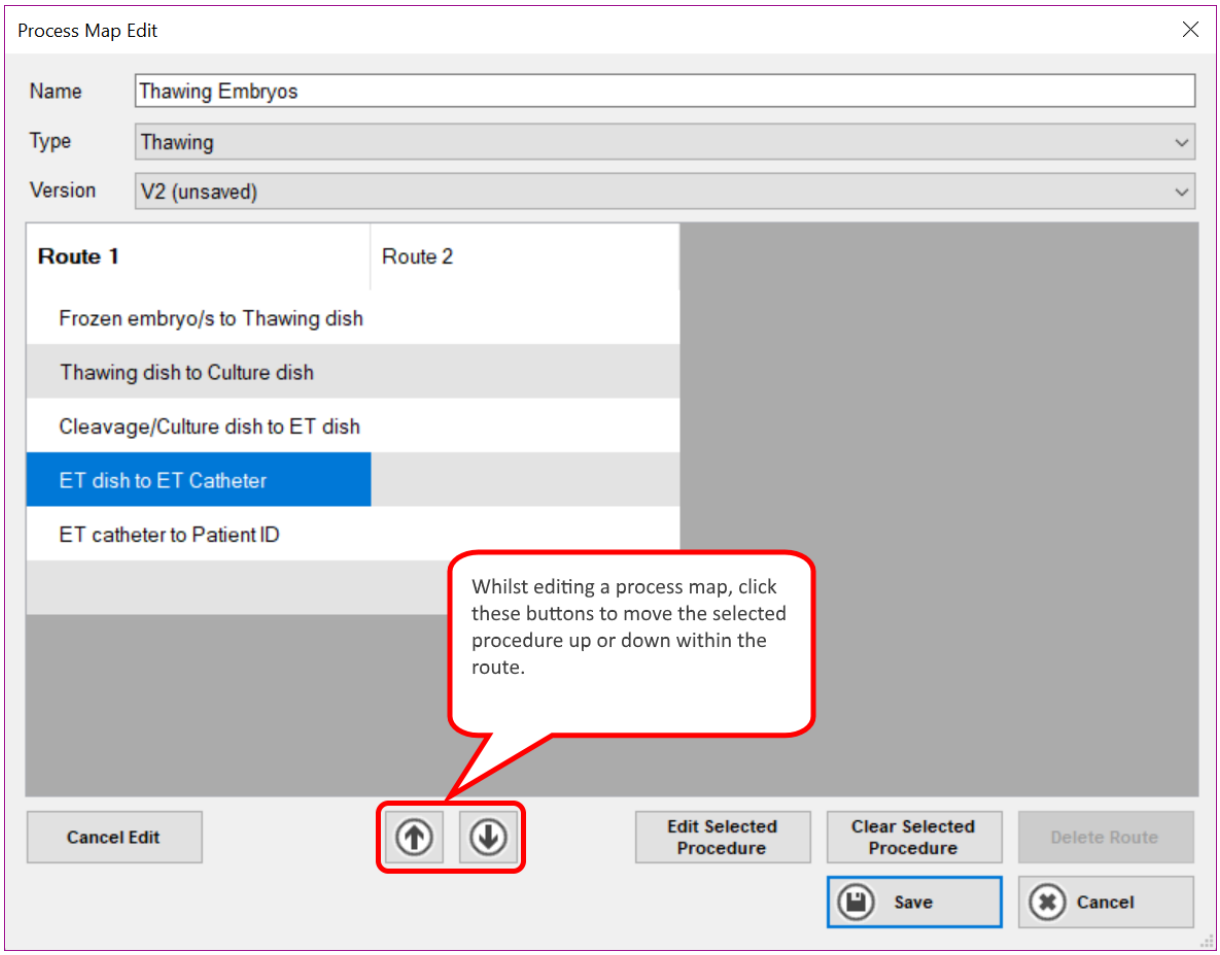


Remember last Matcher user = false

These settings are available to administrators by clicking **Tools** > **Settings**. There are two settings – **Remember last Matcher user** and **Remember last Pocket Matcher user**. These should be set to *false* to leave the **Username** box blank for logging in, or *true* to pre-fill the **Username** box with the last user.

18. 'Move procedure' buttons on Process Map screen

We have added some 'Move' buttons to allow you to move procedures up and down when editing a process map.



Good to know…

- If you need to insert a procedure into a process map, insert it at the bottom of the relevant route and then use the UP arrow to move it to the correct position.
- If you need to remove a procedure from a process map, highlight the procedure you want to remove and click the **Clear Selected Procedure** button.

19. New BETA support portal

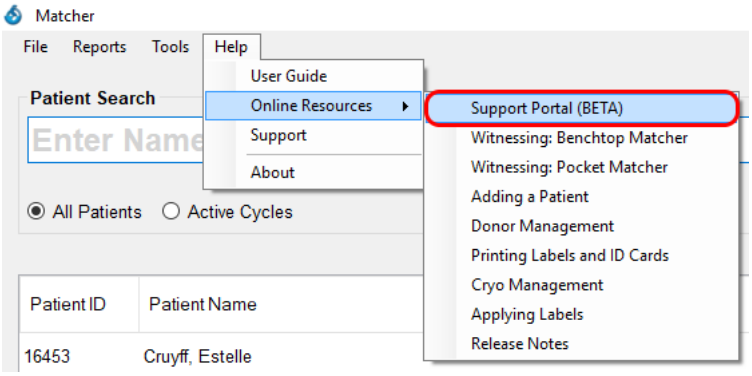
We have a new support portal available to provide you with more flexible support options including:

- Submit support queries online;
- Access to how-to guides (from the Matcher user guide);
- Troubleshooting information;
- How-to videos.

The support portal is currently in BETA phase – we are still in the process of developing and refining it and we'll be adding lots more content and features over the coming weeks and months. We'd love you to take a look around, start to use it and give us some feedback. Are there any articles you'd like to see added?

Would you like to see videos on any specific functionality? Click on the **Submit a request** option within the portal to send us feedback.

You can access the support portal from within Matcher by clicking **Help** > **Online Resources** > **Support Portal (BETA)**:



Alternatively, you can access it through the following link:

https://matchersupport.zendesk.com/

20. Various small changes and updates

We've made various other small changes and updates as follows:

(a) We've added a warning message where you try to print cryo labels from a freeze dated before today. You are still able to print old cryo labels, but this extra safety check ensures you are not printing labels for an old freeze accidentally.
(b) For consistency, we've changed **Clinic ID** to **Patient ID** throughout the application.
(c) We've updated some of the options available under the **Tools** menu so that they are only available to users with Administrator access. This is to ensure that administrator-level settings are not accidentally updated by users who have not been trained to use those functions.
(d) We've also restricted some of the options available within the **Settings** screen to be available to Matcher support staff only. This is to ensure critical settings are not accidentally changed.
(e) We've added a time and user stamp to the notes you can add to each match in the **Patient** > **Matches** tab so you can see who added the note and when.
(f) We've updated the cycle count feature on the **Cycle Licence Management** screen to include filters and ensure accuracy.
(g) We've updated the procedure report to ensure that any manual entries containing a letter are shown in the case they were entered – e.g. F12399 or f12399.
(h) You can now see which database you're connected to – this is useful where you have a test system, or for clinic groups where some people have access to multiple databases. This is shown at the bottom right of the Matcher screen.
(i) We've updated the **Cryo Vessel** report to ensure empty levels or containers are always shown.
(j) We've updated the default filenames when exporting reports to Excel. This ensures you don't see an error when trying to save a file with certain characters.
(k) We've updated our **Help** > **About Us** screen with more up-to-date contact information.
(l) We've updated the **Consent** fields on the **Freeze Details** screen to make them easier to use and understand.
(m) Various minor updates and bug fixes.

What do I need to do to implement this update?

Our Support Team will contact your IT Team to arrange installation / upgrade. This can now be done with our one-step installer making upgrades much quicker and easier.

As this upgrade includes a lot of customisable options so that you can fit Matcher in with the way that you work, you will receive a short questionnaire to complete to specify which options you'd like to enable (e.g. ID card per patient or ID card for patient and partner). If we don't receive any response back from this, we will implement the upgrade with the default options.

If you want to take advantage of the new unique barcodes, please let us know so that we can enable them for you.

What else do I need to do?

You do not need to do anything further.

You can contact the Matcher Support Team on +44 (0)1829 771 327 or by email at matcher@imtinternational.com if you have any questions.

Documentation updates

The user guide, as well as the release notes, have been updated with this release. The user guide can be found by clicking **Help** > **User Guide** in Matcher; release documents can be found by clicking **Help** > **Online Resources** > **Release Notes**.

Are there any impacts or risks in applying this update?

- There should not be any disruption to your ongoing work during the upgrade, but access to each PC running the Matcher software will be required to perform the upgrade and user acceptance testing, during which it will be unavailable to use.
- This is a medium-high risk change consisting of changes to the database, PC application, Pocket Matcher application, Matcher service and labels. A full database backup will be performed before the upgrade is implemented.
- In the unlikely event that the system upgrade causes any negative issues, the software can be rolled back to a previous version.

Quality assurance (QA)

These changes have been subject to IMT's quality assurance process as follows:

- All system changes are logged, tracked and source controlled.
- System testing is completed throughout the development lifecycle to ensure changes have been completed as required.
- Full regression testing is completed to ensure changes have had no adverse impacts on other areas of functionality.
- Full internal 'user acceptance testing' is completed by members of the IMT team.
- Usability testing is incorporated into all stages of the QA process.
- Beta testing is completed by a limited number of Matcher customers at their sites with live data. This is normally one to three customers, who are selected based on the suitability of their workflows with the areas of affected functionality.

Further questions

If you have any questions on this release, please contact the Matcher Support Team on +44 (0)1829 771 327 or email matcher@imtinternational.com.