Axnosis

Demo script – LAB Mobile App

Microsoft Dynamics 365 FO

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Foreword

The Laboratory Information Management System (LIMS) application is an integral part of an accurate and efficient lab testing environment. The application will assist with the automation and effectiveness of managing and automating the flow of samples; results and associated data. Controls need to be implemented from the start of the process flow to ensure that the lab has the capacity to handle the projected number of samples that might be received.

Analysis requests are recorded electronically as received from the customer. Once the samples are collected or received by the laboratory, the samples are electronically recorded with unique numbers and linked to the analysis request. An analysis order is generated for the laboratory to notify them of the tests to perform for the related sample.

Transfer of the samples can be traced effortlessly by accurately recording the movement of the samples between storing sites.

Results can then be entered and approved electronically and reported for the samples.

To improve laboratory efficiency, the LIMS mobile application allows for easy viewing of the pending and completed analysis requests; orders and results associated with the recorded samples, whilst on the move.

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Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
Test Script – Samples - LIMS001	17/11/2020	1.0	Noelene Cilliers
Test Script – Create and Process Analysis Requests - LIMS002	11/11/2020	2.0	Matthys van der Vyver
Test Script – Create and Process Analysis Orders - LIMS003	19/10/2020	2.0	Matthys van der Vyver

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY
14/01/2025	3.0	Julene van Eeden	NA
11/03/2025	4.0	Kaylen van der Berg	Riaan van der Berg

Table 2: Change and Version History

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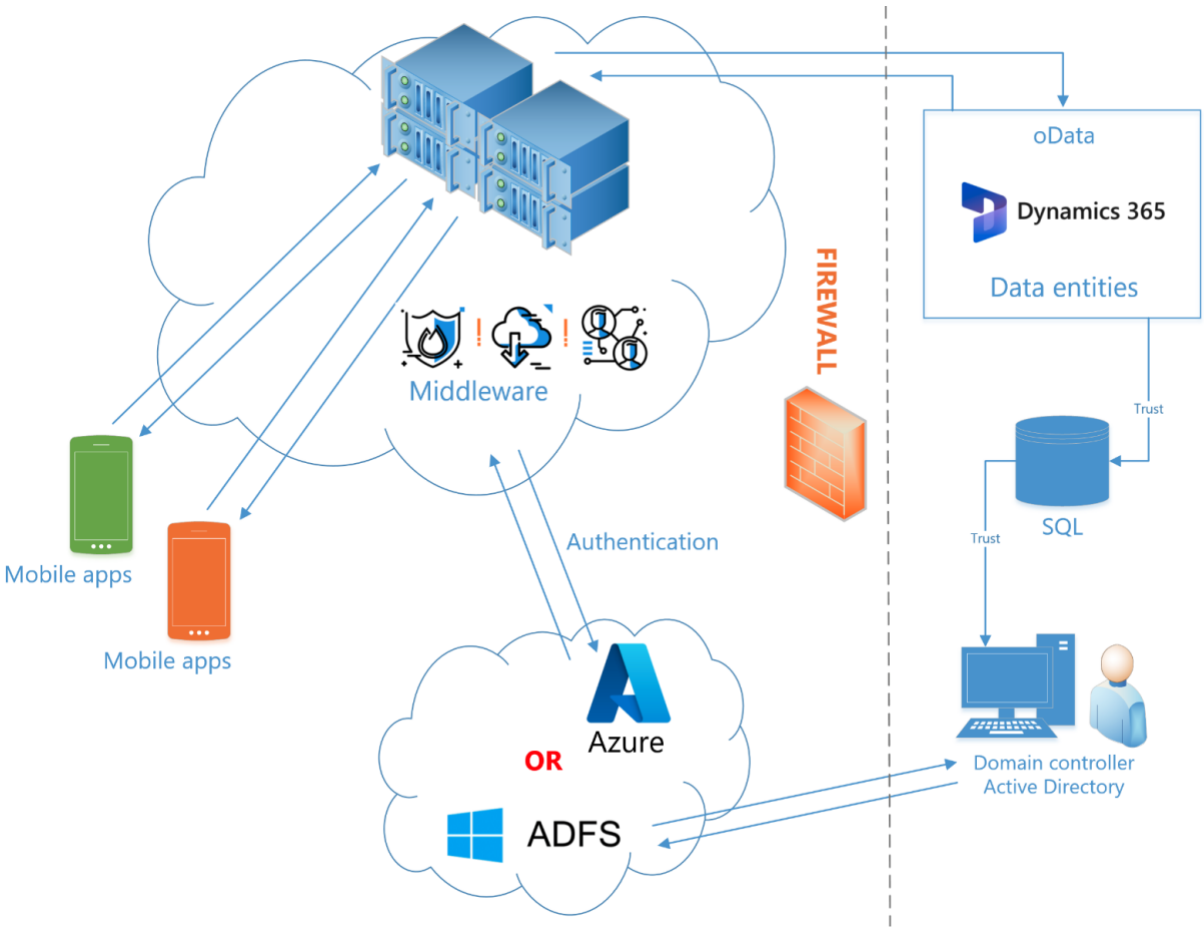
1. Technology

- Microsoft Dynamics 365 (D365 for Finance and Operations)
  - LIMS & HR modules
- Axnosis middleware
- Ionic/Angular standalone applications
  - Lab Information Management System mobile app



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2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Lab Information Management Systems mobile app.
- The apps support both platforms

- The apps can be downloaded from:
  - Android: Google Play store
  - iOS: AppStore or TestFlight

- The user must be registered in AAD and should be a registered user in D365 for Finance and Operations:
  - Environment: Same D365 environment as used for transacting
  - Company: Defaults to the user setup in D365

- The users should be able to successfully login to the app by using the same login details as used for D365 for Finance and Operations. The relevant restrictions and legal entity allocations on D365 for Finance and Operations will be applied on the mobile app sessions. The same user security roles will permit/exclude the user's right to capture events on the app.

- Whenever a new app update is required to be installed on the mobile phone, first ensure:
  - Current (old) app is uninstalled
  - Clear the mobile phone's cache (Android)
  - Remove all previous downloads of the application from the phone's download folder
  - Re-install the application and use

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2.1 Background and Scenario

A Laboratory Information Management System (LIMS) application is all about the management and automation of the flow of samples and associated data to improve lab efficiency.

Laboratories may be utilized in the analysis of various types of samples in different sectors including the mining industry and healthcare.

In a patient healthcare scenario, the process typically starts with a patient visiting a medical doctor for a prognosis. To confirm the prognosis and assist in making a diagnosis, the doctor may request laboratory tests to be performed.

In a mining scenario, the geologists or samplers may request analysis of samples from specific collection points in the mine to confirm mining trajectory and ore quality.

These requests for testing received from the mine or medical doctor is recorded in LIMS as an Analysis request.

Samples are then collected from the patient or mine and submitted to the laboratory for analysis. These samples are recorded in LIMS and an analysis order placed to indicate the tests to be performed to the laboratory.

The laboratory enters and approves the results in the LIMS analysis journal, whereafter laboratory reports may be generated for the sample and sent to the doctor or mine, thereby closing the analysis request loop.

The laboratory results may be accessed by the mine staff or doctor and patient via the mobile app. Appropriate steps can then be taking to remedy the situation, based on the sample results.

Dynamics 365 LIMS supports key modules and is an extension of the Axnosis developed occupational health module.

All the above provides a compelling reason to have certain LIMS functions available on a mobile app.

- It is assumed that D365 LIMS and HR modules are installed on D365
- Customers; numbers; items; workers and the users sub modules are configured

The LIMS mobile app is utilized to view analysis requests; orders and sample results. The app does not allow for transactions to be recorded or edited.

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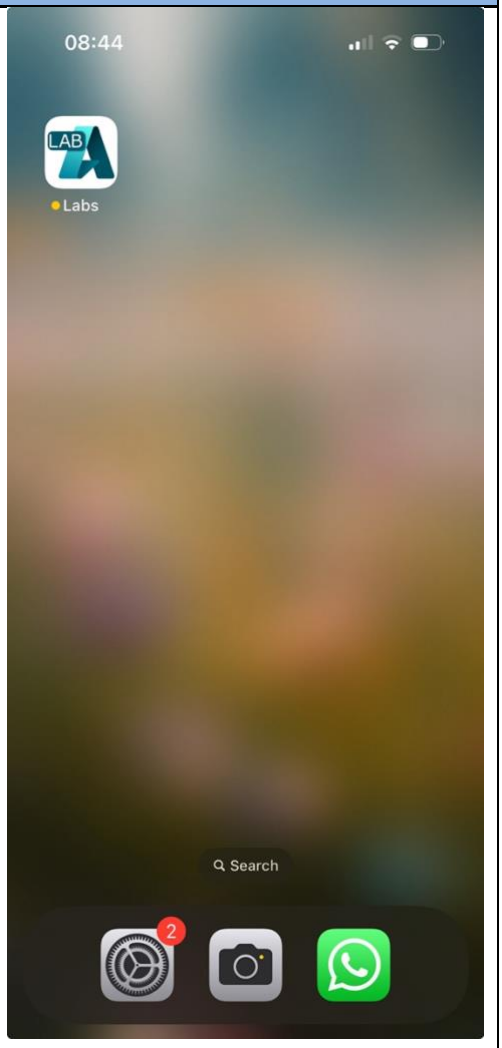
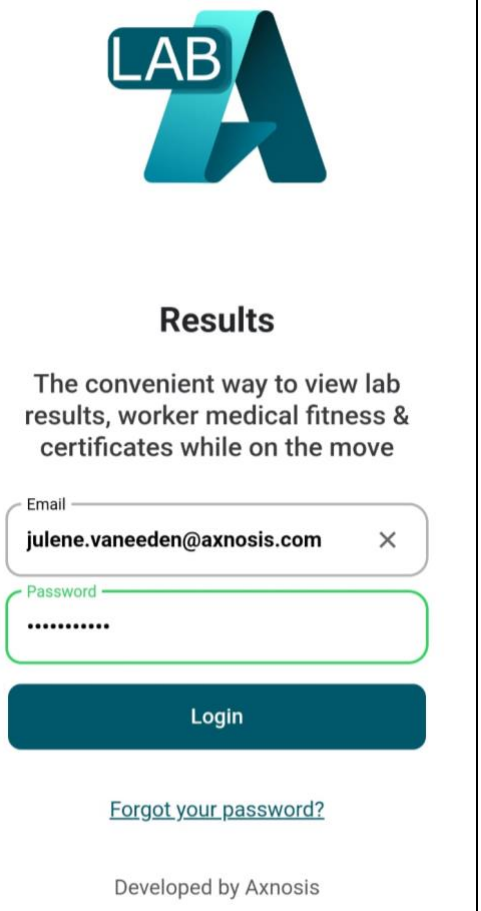
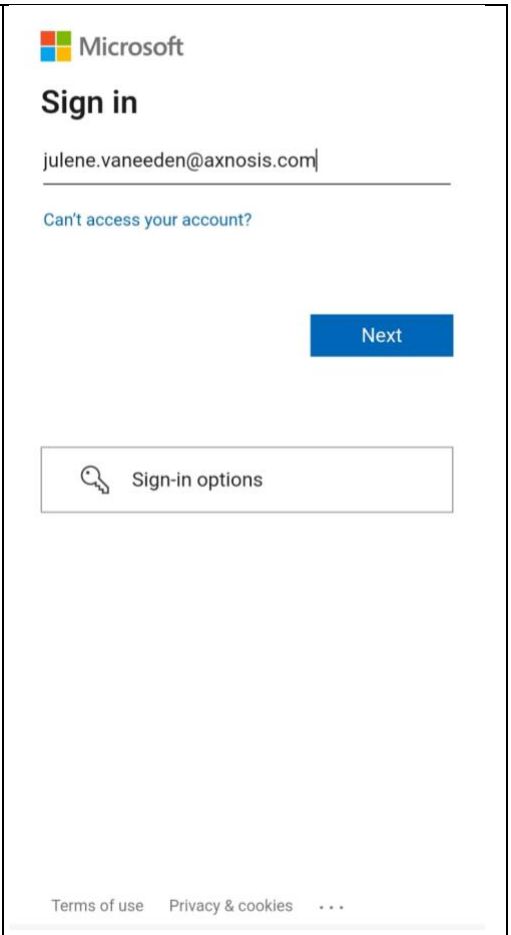
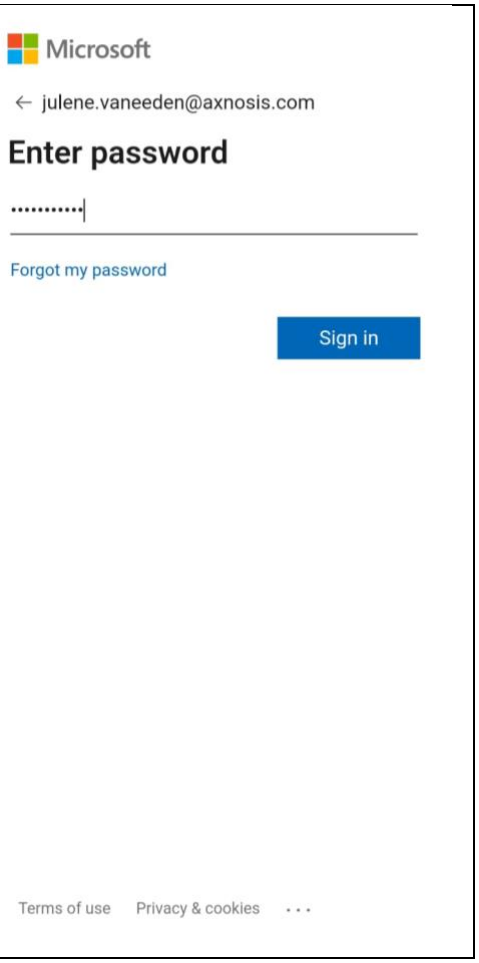
3. Demo script

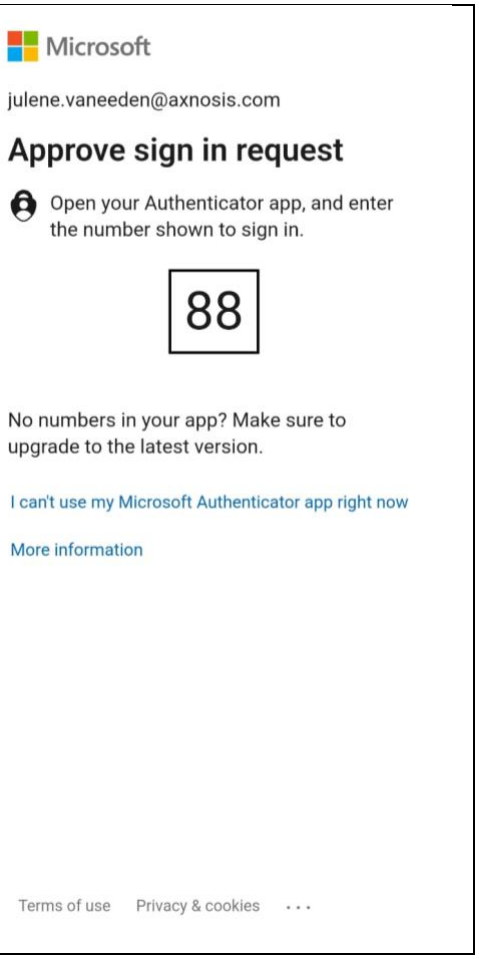
3.1 Log into the LAB app

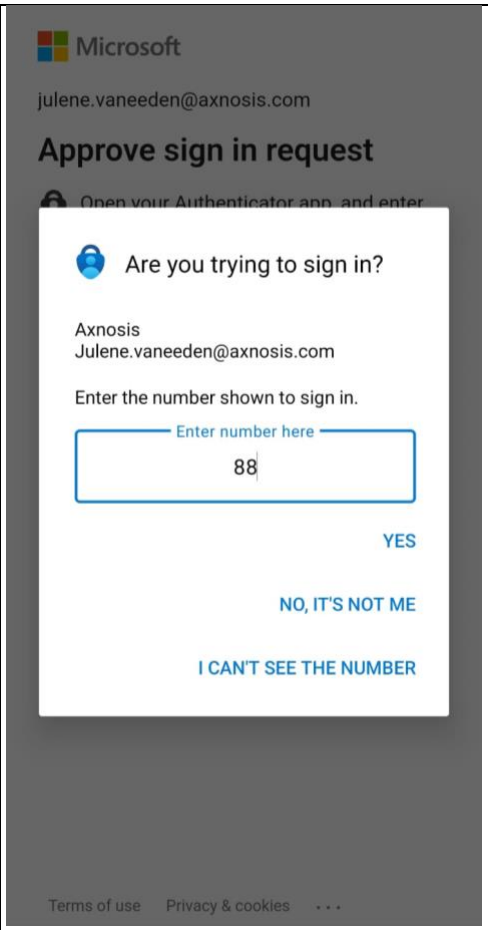
TALKING POINTS AND STEPS	MOBILE APP
The user taps on the **LAB** app icon on their mobile device.	

TALKING POINTS AND STEPS	MOBILE APP
The logo on the **login** screen appears. The user's D365 login details (**Username** and **Password**) are entered and used by the app for validation. The user then taps on the **Login** button to log into the app session.	

If multi-factor authentication has been enabled for the organization, Microsoft sign in may required in addition to the application sign in. During the initial sign in, the Microsoft sign in may have to be completed twice. The Microsoft sign in will not be required during every sign in to the mobile application. Sign in to Microsoft will be required during initial sign in; after sign in expiry and after a user has opted to manually sign out of the Laboratory application. Enter the **Microsoft email account** and click on the **Next** button to continue.	

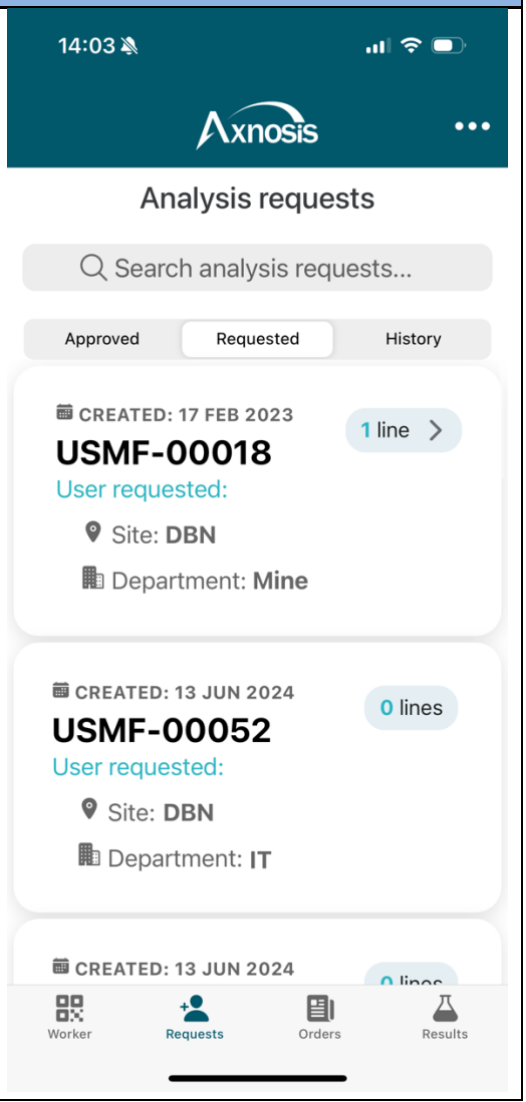
Enter the **password** for the Microsoft account entered. Click on the **Sign in** button to continue.	

If multi-factor authentication is enabled, the **authentication number** may be displayed. Take note of the number for entry in the authenticator app.	

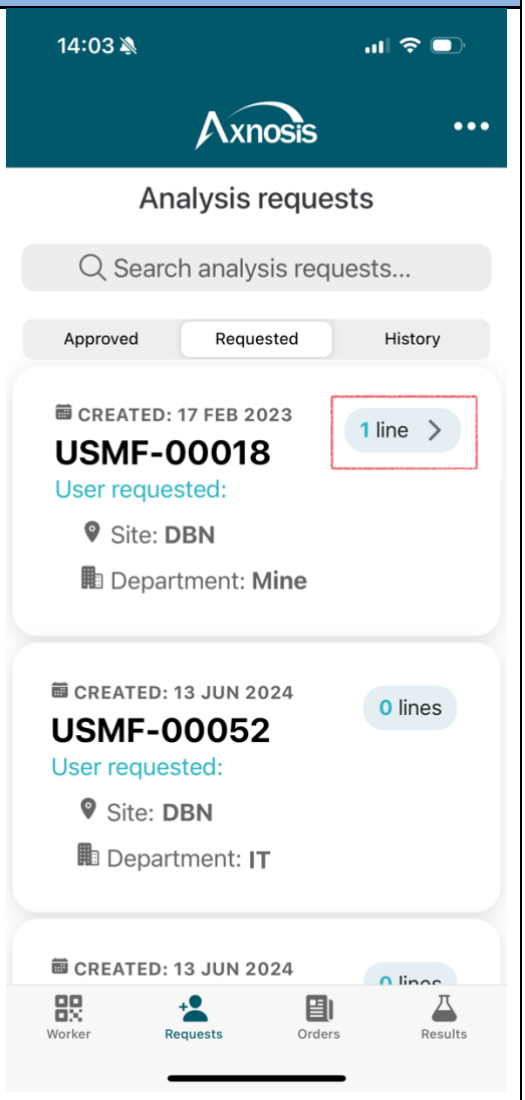
A notification may appear requiring the authentication number to be entered or the user may opt to access the authenticator app manually to complete the authentication process. Enter the **authentication number** previously provided to approve the sign in then click on the **Yes** button to continue.	

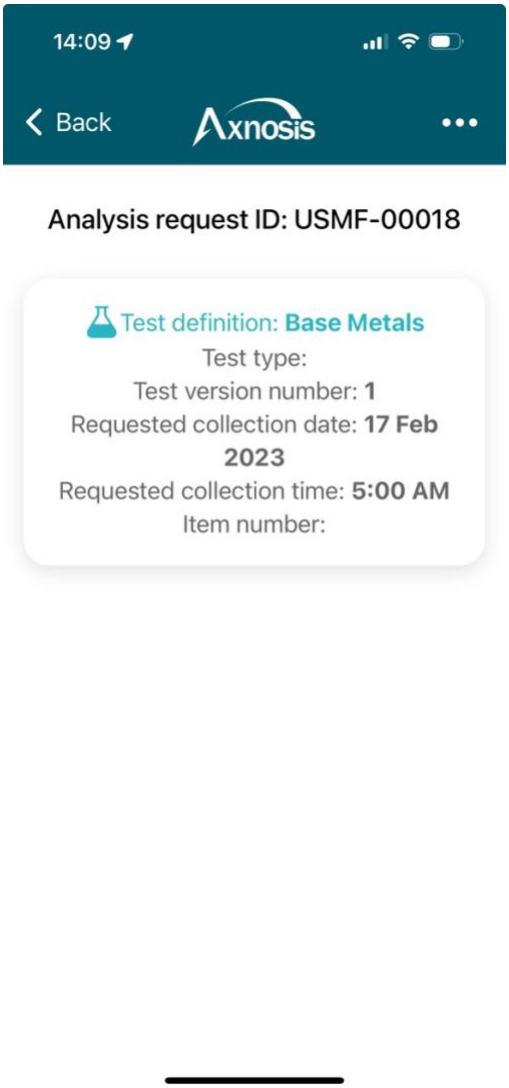
3.2 Viewing the Analysis requests via the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP

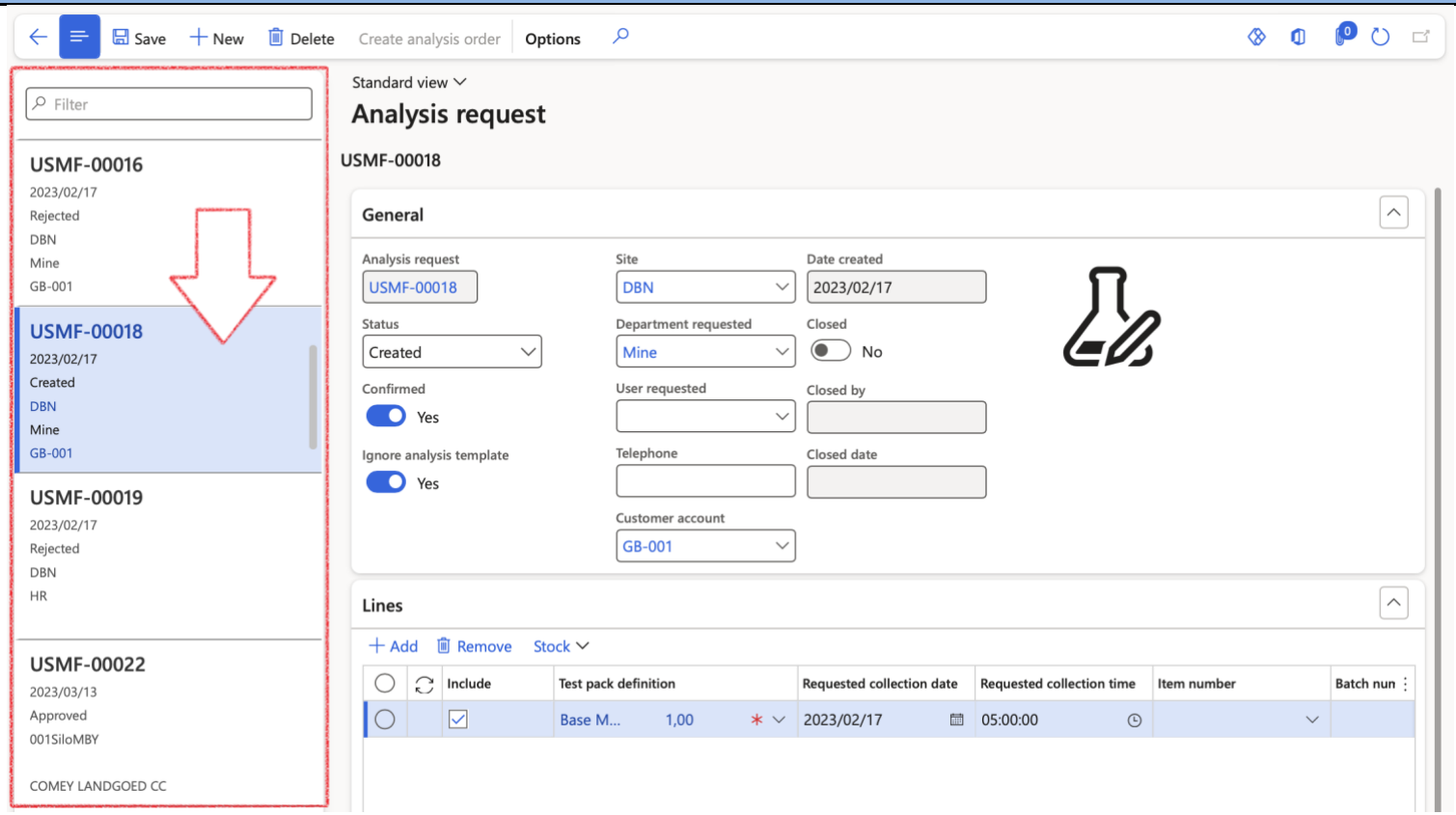
The **Analysis requests** screen opens by default. The three tabs on this screen gives the user the option to view:
• **Requested** - All pending requests with the status:
  ○ Created
  ○ Submitted
• **Approved** – All approved requests
• **History** – All closed and rejected requests
 	
These requests have been created in **Microsoft D365**.
 	
The following details are visible for each request:
• **Created** – Date that the request was created
• **Analysis request number** – The unique code for the analysis request
• **User requested –** The name/ID of the user that requested the analysis
• **Site –** The site that requested the analysis
• **Department –** The department that requested the analysis
	

3.2.1 Viewing the Requests details on the D365 Lab mobile app

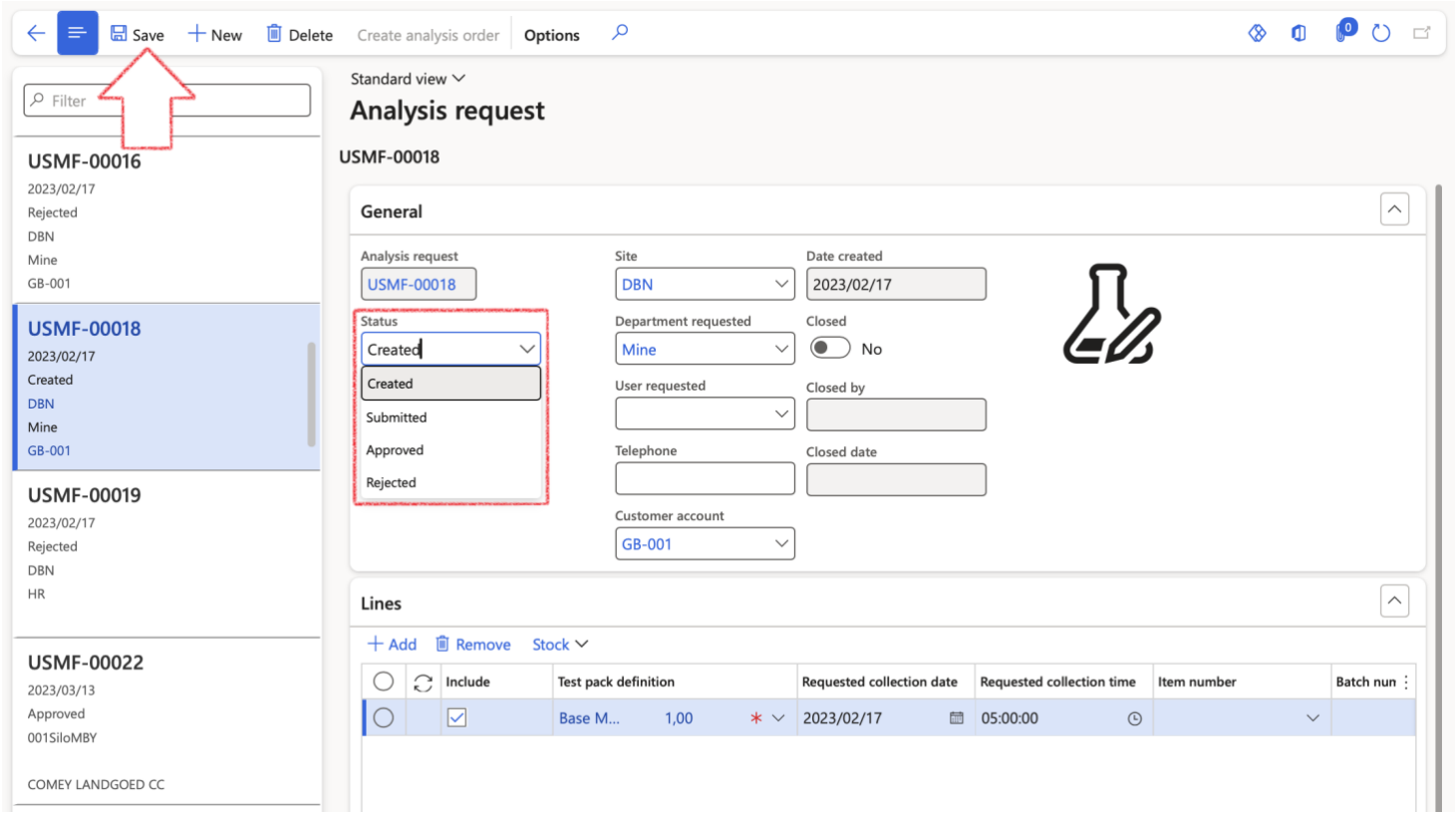
TALKING POINTS AND STEPS	MOBILE APP
To view the **Request** details and specific lines for each request, tap on the Request or the **Right-angle bracket (>)** shown beside the lines, to expand the view. Note that if a request has no line details, the **Right-angle bracket (>)** will not show.	

TALKING POINTS AND STEPS	MOBILE APP
The Analysis Request ID appears at the top of the screen. The following details are shown for each line: • **Test definition –** The test group ordered • **Test type –** The type of test defined for the ordered test • **Test version number** – Version number of the ordered test • **Requested collection date –** The date the sample should be collected • **Requested collection time** – The time the sample should be collected • **Item number** – The product item number associated with the request	

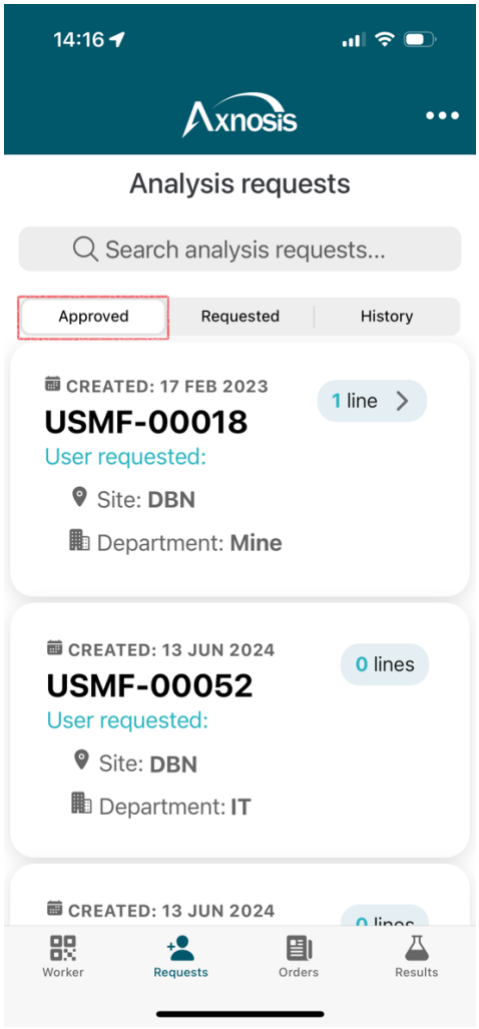
3.2.2 View the Analysis requests in Dynamics 365

TALKING POINTS AND STEPS	DYNAMICS 365
Go to: **Lab information management > Common > Analysis requests** All requests are shown in the Request List on the left (**Approved, submitted and historic)** Select an analysis request in order to view the details of the request	

3.2.3 Change the Request status in Dynamics 365

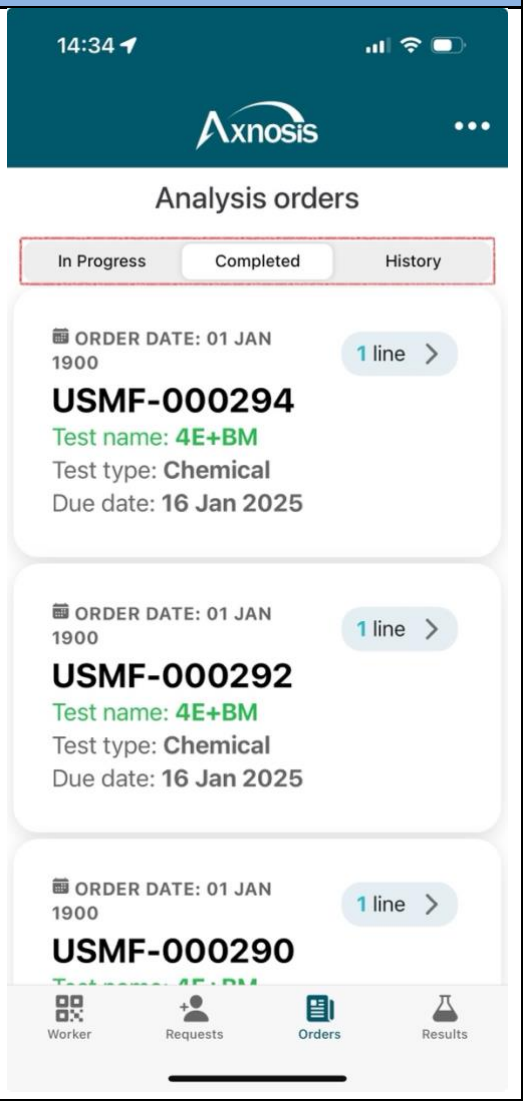
TALKING POINTS AND STEPS	DYNAMICS 365
To change the status of the analysis request, in D365 select the required status from the drop-down list. Click on the Save button. The request will move to the correct tab in the app based on the status selected in D365.	

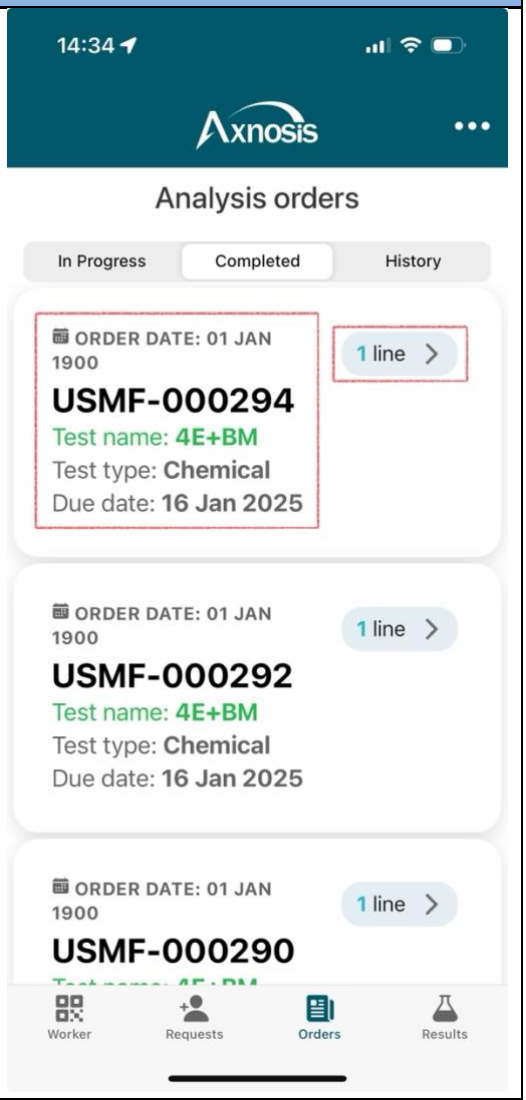
3.2.4 View the change of the Request status on the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP
After the status of the Analysis Request item was changed to approved in D365, the record USMF-00018 can now be seen in the Approved tab on the mobile app.	

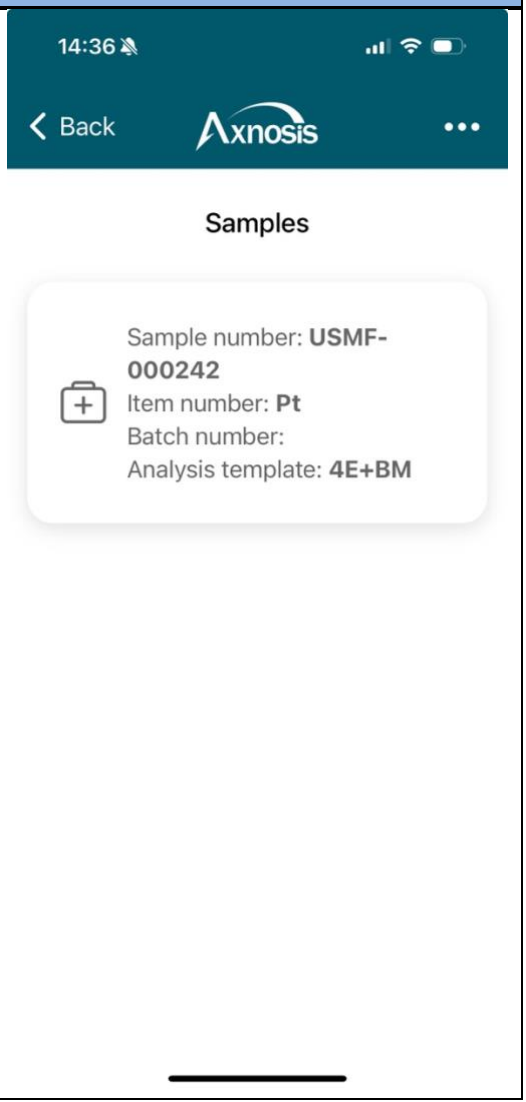
3.3 Viewing the Orders via the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP

Select the Orders tab in the app to view the **Analysis Order** screen. The three segments on this screen gives the user the option to view:
• **Completed** - All completed orders
• **In progress** – All open orders with the following status:
  ○ Created
  ○ Released
  ○ In progress
  ○ Ready for review
  ○ Reset to in progress
• **History** – All cancelled and archived requests
These analysis orders have been created in **Microsoft D365**.
	

TALKING POINTS AND STEPS	MOBILE APP
The following details are visible for each **Order:** • **Order Date** – The date the order was created • **Analysis order number –** The unique code for the order • **Test Name –** Name of the test ordered • **Test type –** The type of test as defined for the ordered test • **Due date –** The date specified during ordering of when the order is due To view the **Analysis Order** details and specific lines linked to the order, tap on the Order or on the **Right-angle bracket (>)** shown above the 1 line, to expand the view.	

3.3.1 Viewing the Sample details linked to the Orders via the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP
Note that is the **Samples** information that is linked to the **Analysis Order**. The additional information is as follows: • **Sample Number –** The unique sample number • **Item Number –** The item number associated with the sample • **Batch Number –** Batch number recorded for the sample • **Analysis Template –** Test group ordered for the sample	

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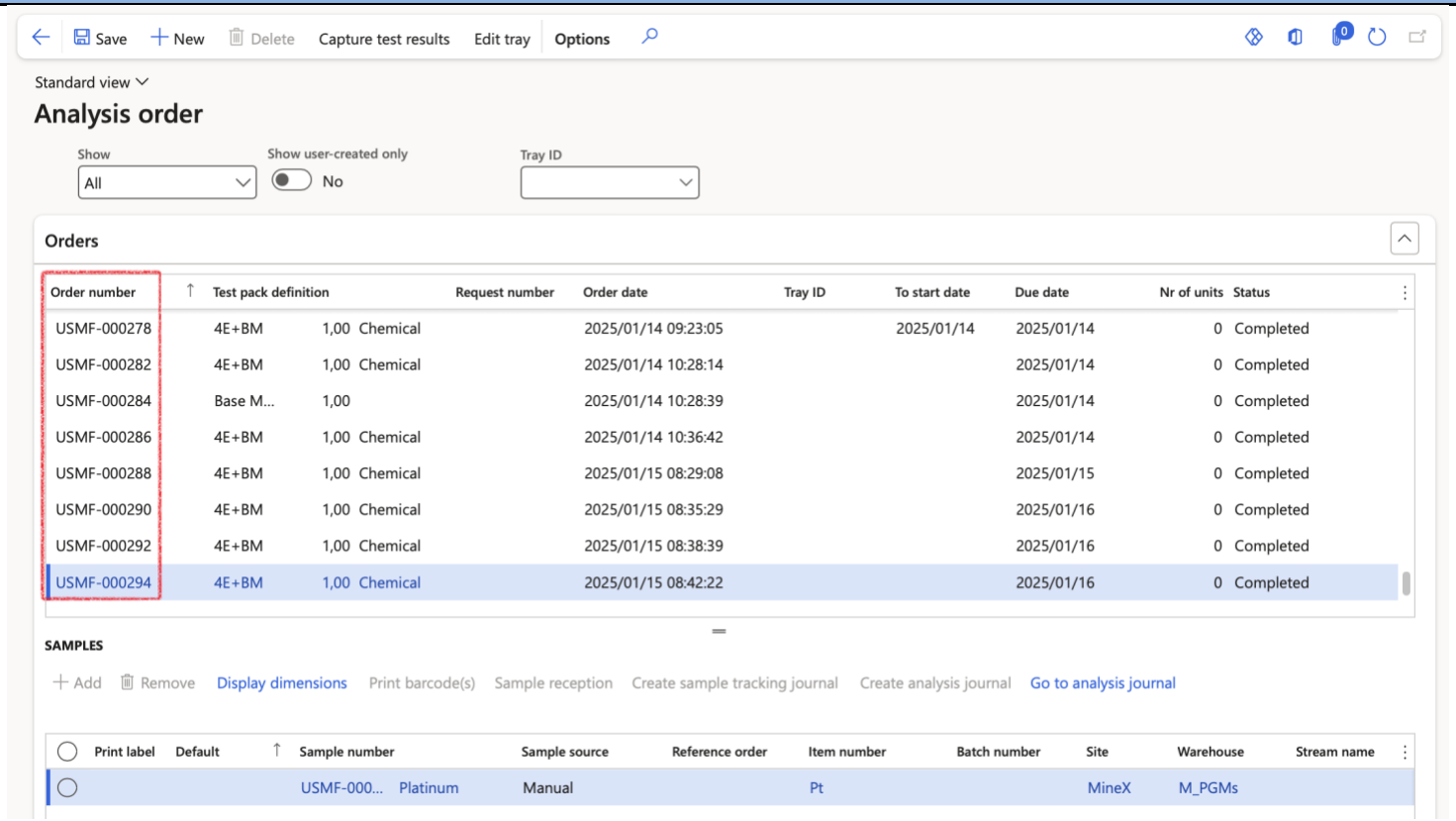
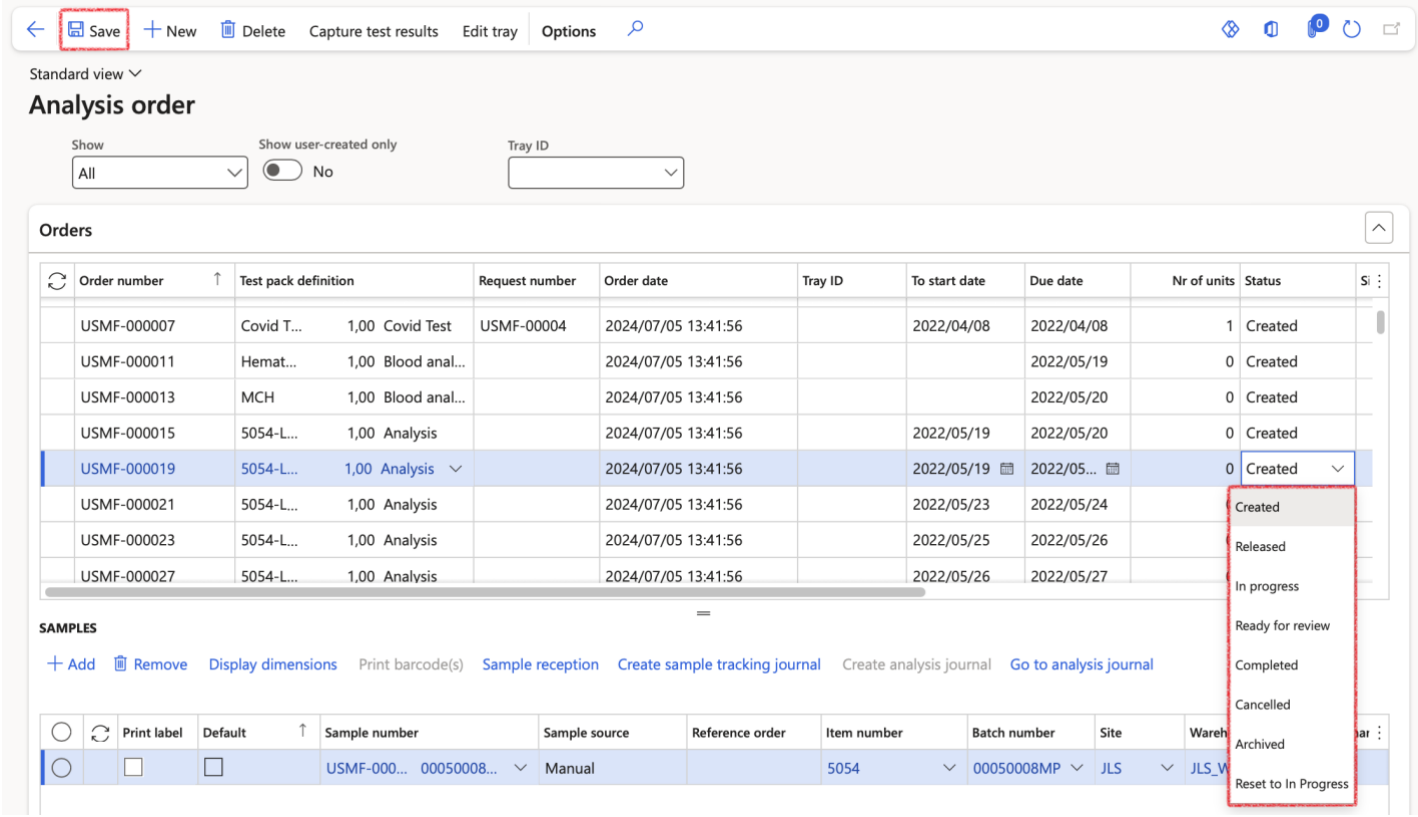
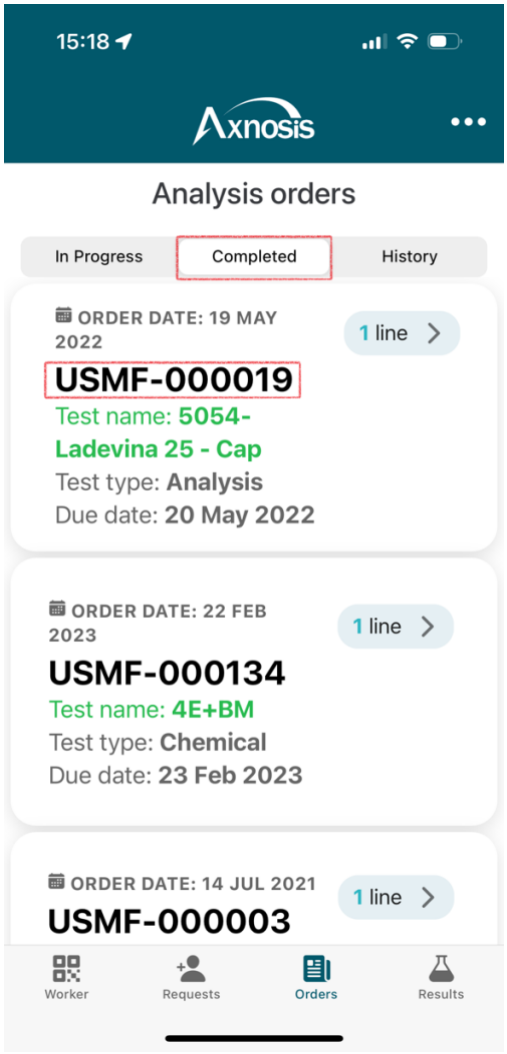
3.3.2 View the Orders on Dynamics 365

TALKING POINTS AND STEPS	DYNAMICS 365
Go to: **Lab information management > Common Analysis order** The unique number associated with each analysis order appears in the **Order number** column. Select an order to view the samples associated with it.	

3.3.3 Change the Order status on Dynamics 365

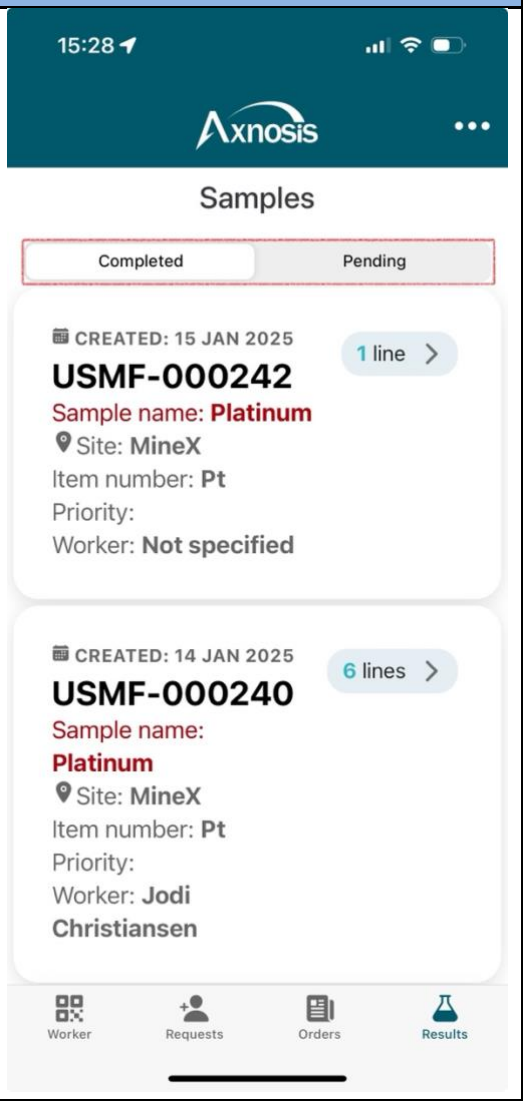
TALKING POINTS AND STEPS	DYNAMICS 365
Select an order, then in the **Status** column, select the correct status in the dropdown list. Click on the **Save** button in the action pane to save the changes to the order.	

3.3.4 View the change of the Order status on the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP
The **Analysis Order** item record USMF-000019 was moved from the In Progress to the Completed tab.	

3.4 Viewing the Results via the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP

Select **Results** Tab to view **Samples** and associated results. The two segments on this screen gives the user the option to view:
• **Completed** – All completed samples
• **Pending** – All pending samples with the following statuses:
  ○ In process
  ○ Booked in
  ○ Created
  ○ Received
  ○ Submitted
  ○ Draft
 	
These requests have been created in **Microsoft D365**.
	

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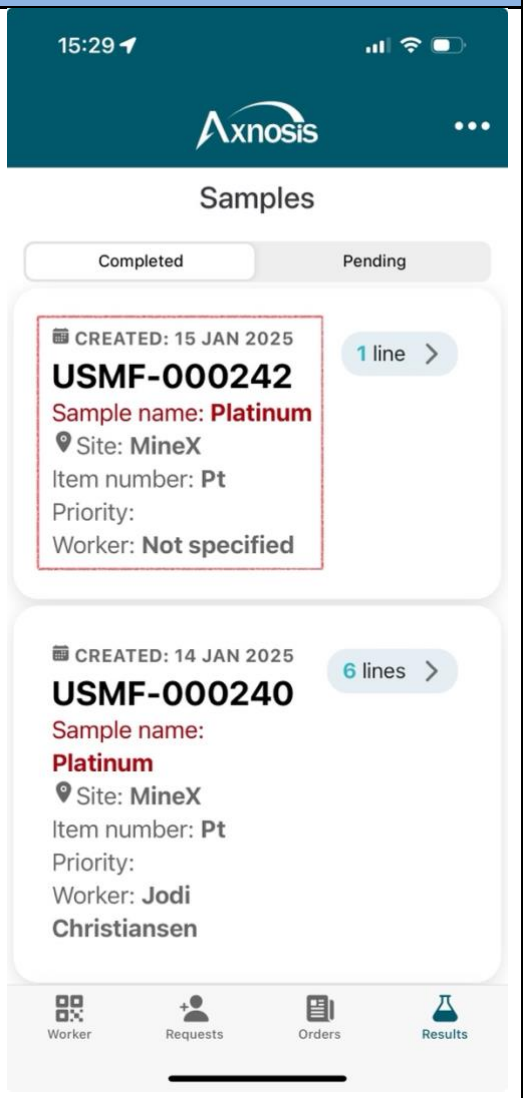
TALKING POINTS AND STEPS	MOBILE APP
The following details are visible for each Sample: • **Created –** The date of the sample was created • **Sample number –** The unique code of the Sample • **Sample Name –** The name of the Sample • **Site –** The location of Sample • **Item Number –** The item number associated with the sample • **Priority –** Low, medium, or high • **Worker –** Name of worker recorded as employee who created the sample To view related **Analysis journals and the related result** details of each sample, tap on the Sample or the **Right-angle bracket (>)**, to expand the view. The number of lines e.g. 1; indicates the number of results that have been posted for the sample. If there is no **Right-angle bracket (>)**, then results have not been submitted on **Microsoft D365** yet for the sample.	

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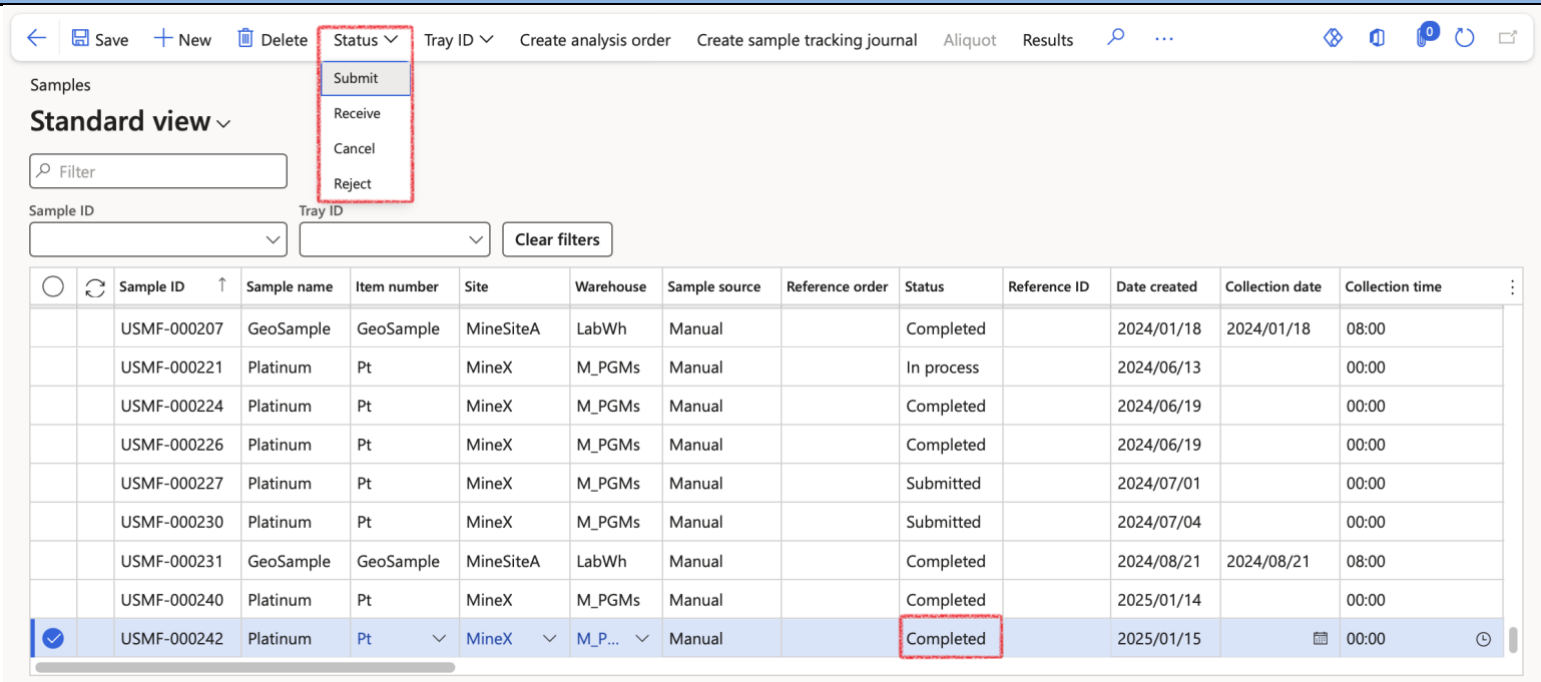
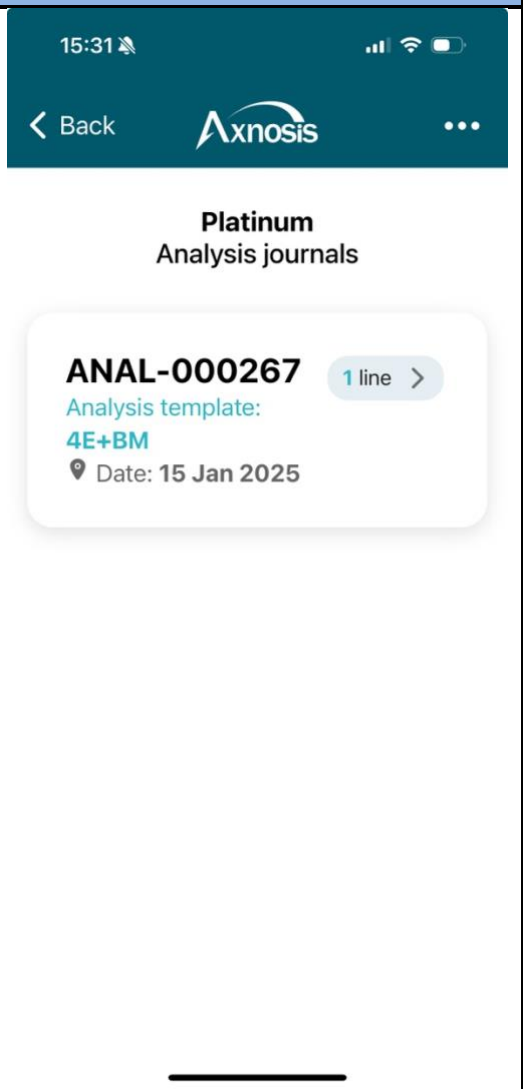
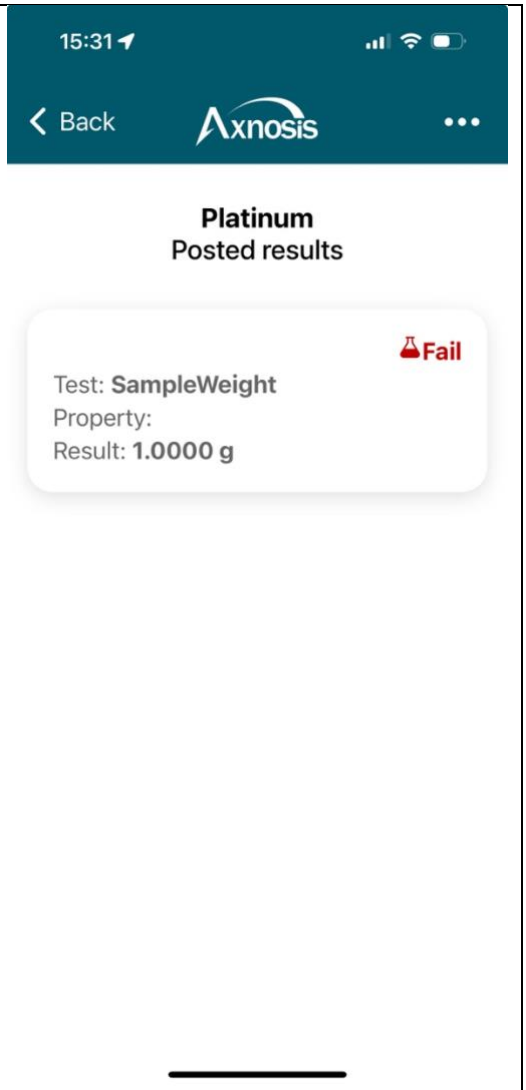
3.4.1 View the Sample status on Dynamics 365

TALKING POINTS AND STEPS	DYNAMICS 365
Go to: **Lab information management > Common > Samples** All samples are shown in the Sample List in the left most column. The status will be changed to "Completed" when users post a sample result on the analysis journal.	

Sample ID	Sample name	Item number	Site	Warehouse	Sample source	Reference order	Status	Reference ID	Date created	Collection date	Collection time
USMF-000207	GeoSample	GeoSample	MineSiteA	LabWh	Manual		Completed		2024/01/18	2024/01/18	08:00
USMF-000221	Platinum	Pt	MineX	M_PGMs	Manual		In process		2024/06/13		00:00
USMF-000224	Platinum	Pt	MineX	M_PGMs	Manual		Completed		2024/06/19		00:00
USMF-000226	Platinum	Pt	MineX	M_PGMs	Manual		Completed		2024/06/19		00:00
USMF-000227	Platinum	Pt	MineX	M_PGMs	Manual		Submitted		2024/07/01		00:00
USMF-000230	Platinum	Pt	MineX	M_PGMs	Manual		Submitted		2024/07/04		00:00
USMF-000231	GeoSample	GeoSample	MineSiteA	LabWh	Manual		Completed		2024/08/21	2024/08/21	08:00
USMF-000240	Platinum	Pt	MineX	M_PGMs	Manual		Completed		2025/01/14		00:00
USMF-000242	Platinum	Pt	MineX	M_P...	Manual		Completed		2025/01/15		00:00

3.4.2 Viewing the Sample Results via the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP
The **Analysis journals** related to the sample will be listed. The Sample name appears at the top of the Analysis journals list. The following details are visible for each Analysis journal: • Analysis journal name • Analysis template • Date of creation To view the related **Result** details of each Analysis journal, tap on the **Analysis journal** or the **Right-angle bracket (>)**, to expand the view. The number of lines e.g. 1; indicates the number of results that have been posted for the sample and the specific analysis journal. Refer to LIMS Mining Daily Use wiki page for lab orders and journals. https://wiki.axnosis.ae/home/LIMS/DailyUseMining	

The Sample name appears at the top of the list of **Posted results**. The result for each test is listed with the following details: • Test name • Property associated with the test • Result including the units The result will be identified as **Pass** or **Fail** measured against the limits defined for the test.	

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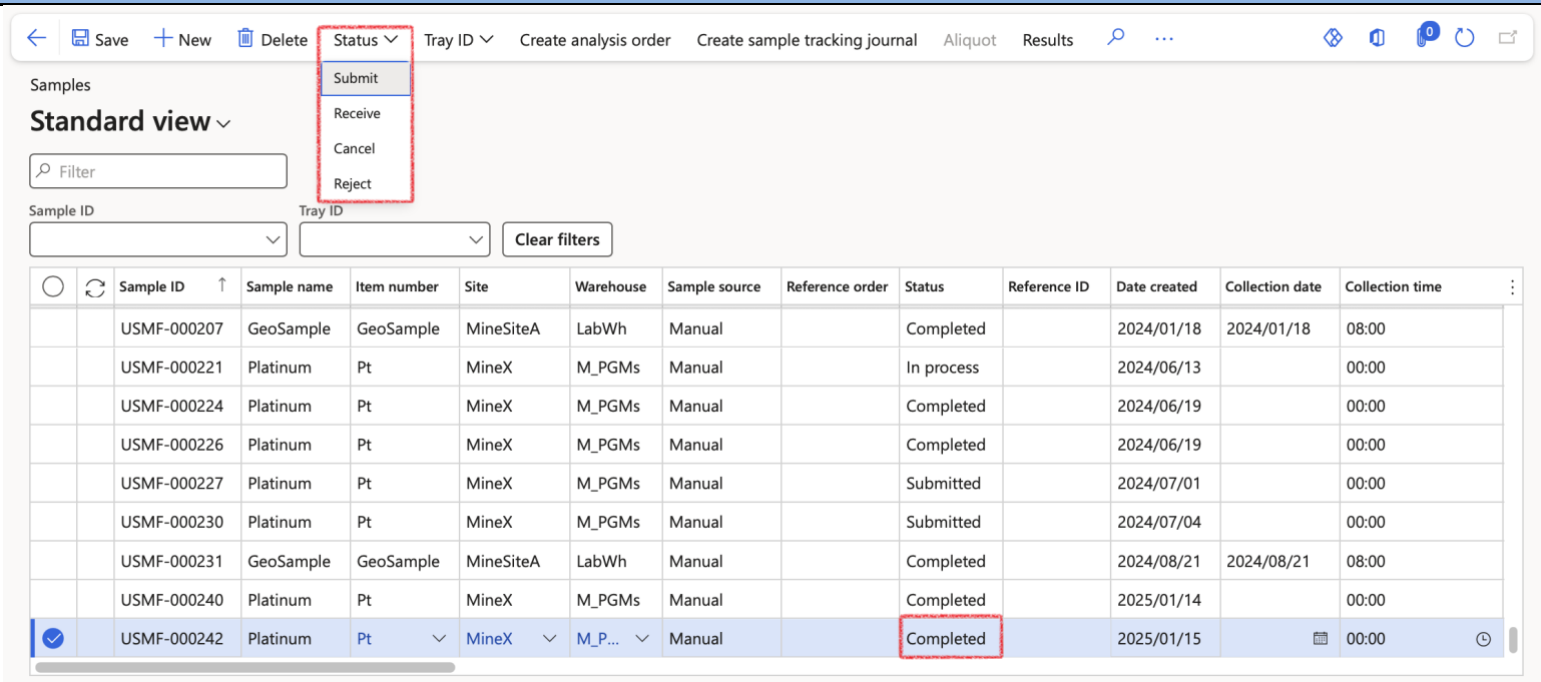
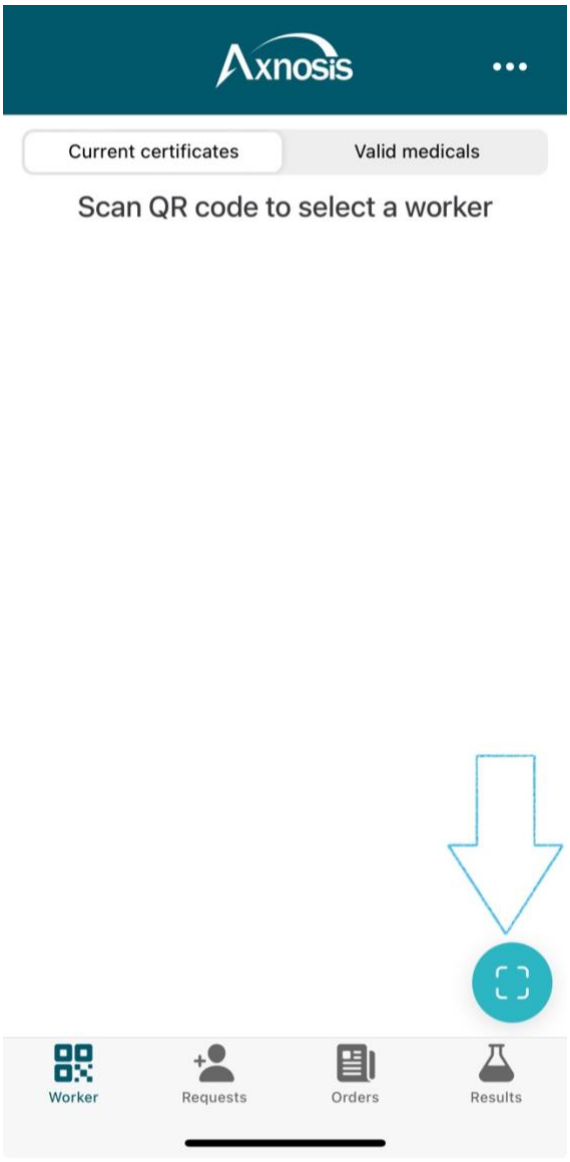
3.4.3 View the Sample status on Dynamics 365

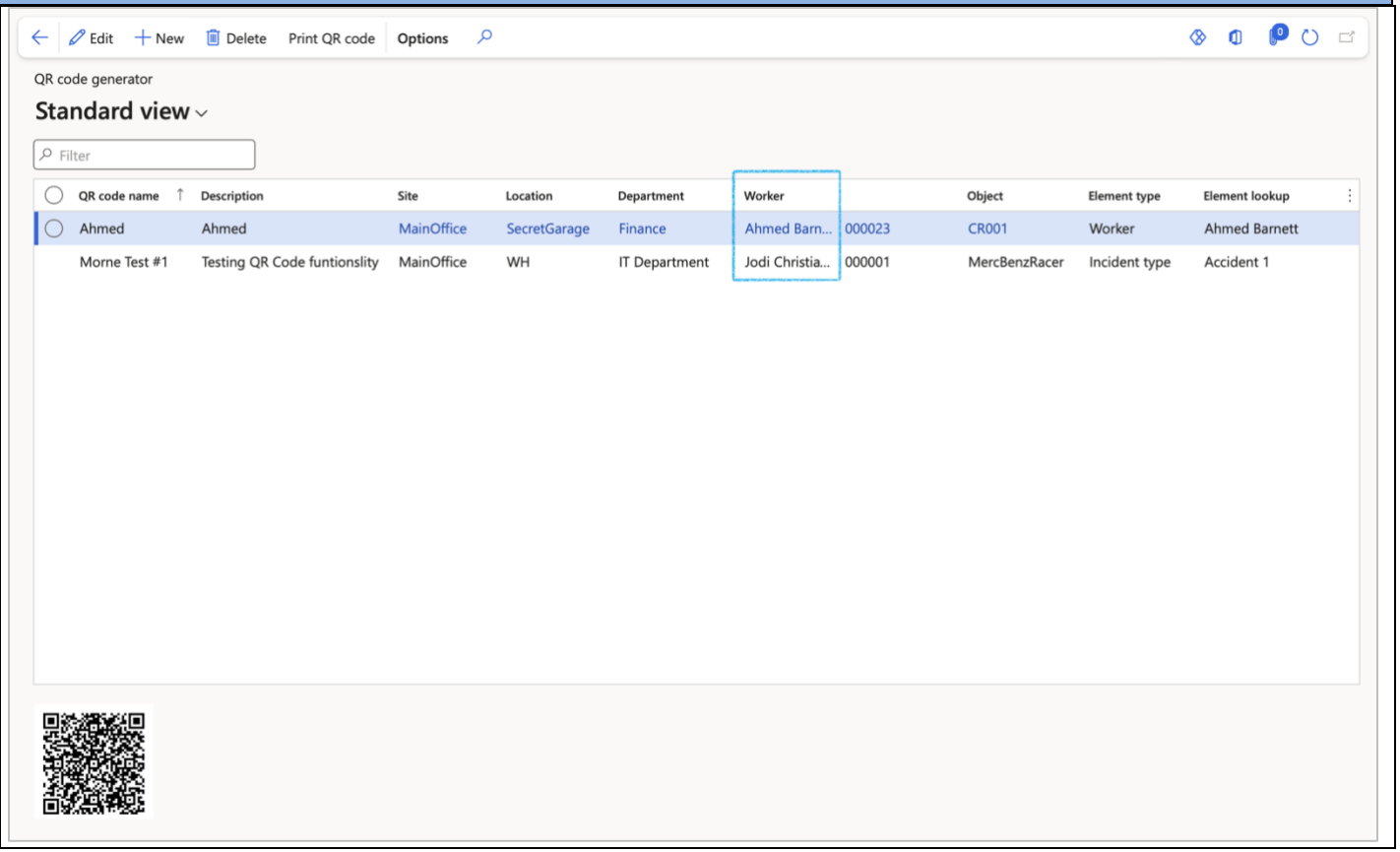
TALKING POINTS AND STEPS	DYNAMICS 365
Go to: **Lab information management > Common > Samples** All samples are shown in the Sample List in the left most column. The status will be changed to "Completed" when users post a sample result on the analysis journal.	

Sample ID	Sample name	Item number	Site	Warehouse	Sample source	Reference order	Status	Reference ID	Date created	Collection date	Collection time
USMF-000207	GeoSample	GeoSample	MineSiteA	LabWh	Manual		Completed		2024/01/18	2024/01/18	08:00
USMF-000221	Platinum	Pt	MineX	M_PGMs	Manual		In process		2024/06/13		00:00
USMF-000224	Platinum	Pt	MineX	M_PGMs	Manual		Completed		2024/06/19		00:00
USMF-000226	Platinum	Pt	MineX	M_PGMs	Manual		Completed		2024/06/19		00:00
USMF-000227	Platinum	Pt	MineX	M_PGMs	Manual		Submitted		2024/07/01		00:00
USMF-000230	Platinum	Pt	MineX	M_PGMs	Manual		Submitted		2024/07/04		00:00
USMF-000231	GeoSample	GeoSample	MineSiteA	LabWh	Manual		Completed		2024/08/21	2024/08/21	08:00
USMF-000240	Platinum	Pt	MineX	M_PGMs	Manual		Completed		2025/01/14		00:00
USMF-000242	Platinum	Pt	MineX	M_P...	Manual		Completed		2025/01/15		00:00

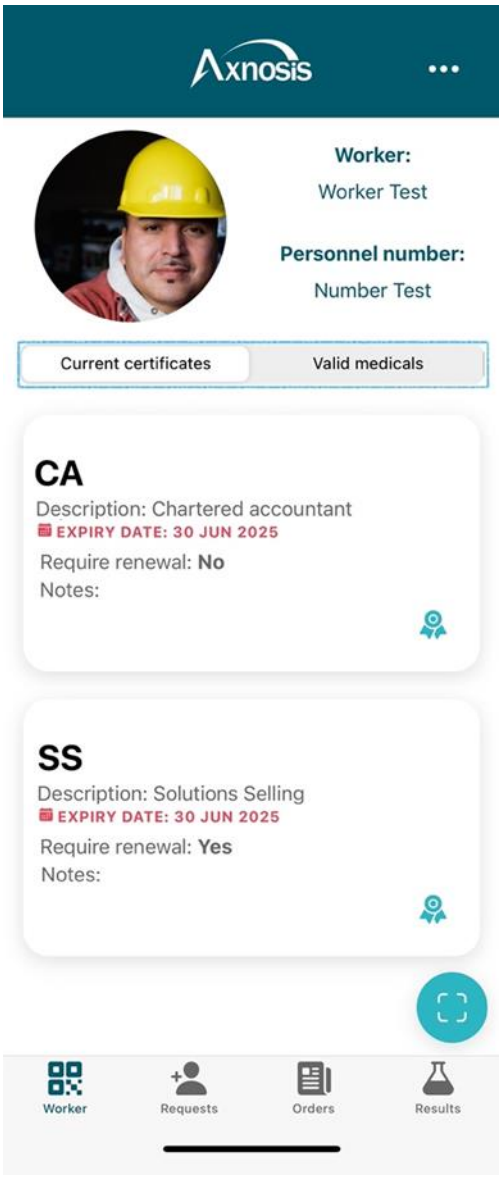
3.5 Viewing Worker certificates and valid medicals via the D365 Lab mobile app

TALKING POINTS AND STEPS	MOBILE APP
In the mobile app, select the **Worker** tab. The **Scan QR code** screen will be displayed. Click on the **QR code scanner** icon. Scan the QR code generated in D365 of the selected worker.	

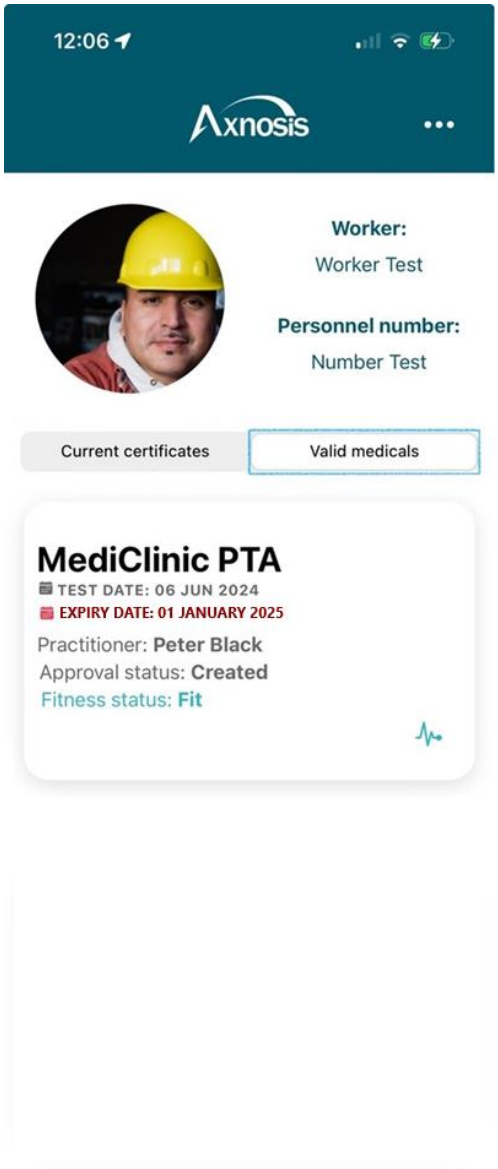
3.5.1 Generate a QR code for a worker in Dynamics 365

TALKING POINTS AND STEPS	DYNAMICS 365
Go to: **GRC > Setup > QR code generator.** Select the worker's name to view his/her details and the associated QR code. If the worker is not included in the list. Create a new record by clicking on the **New** button in the action pane. • Enter the QR code name • Select the worker in the dropdown list • Select Worker in the element column from the dropdown list • Click on the Save button in the action pane. The correct QR code will now be displayed below the grid.	

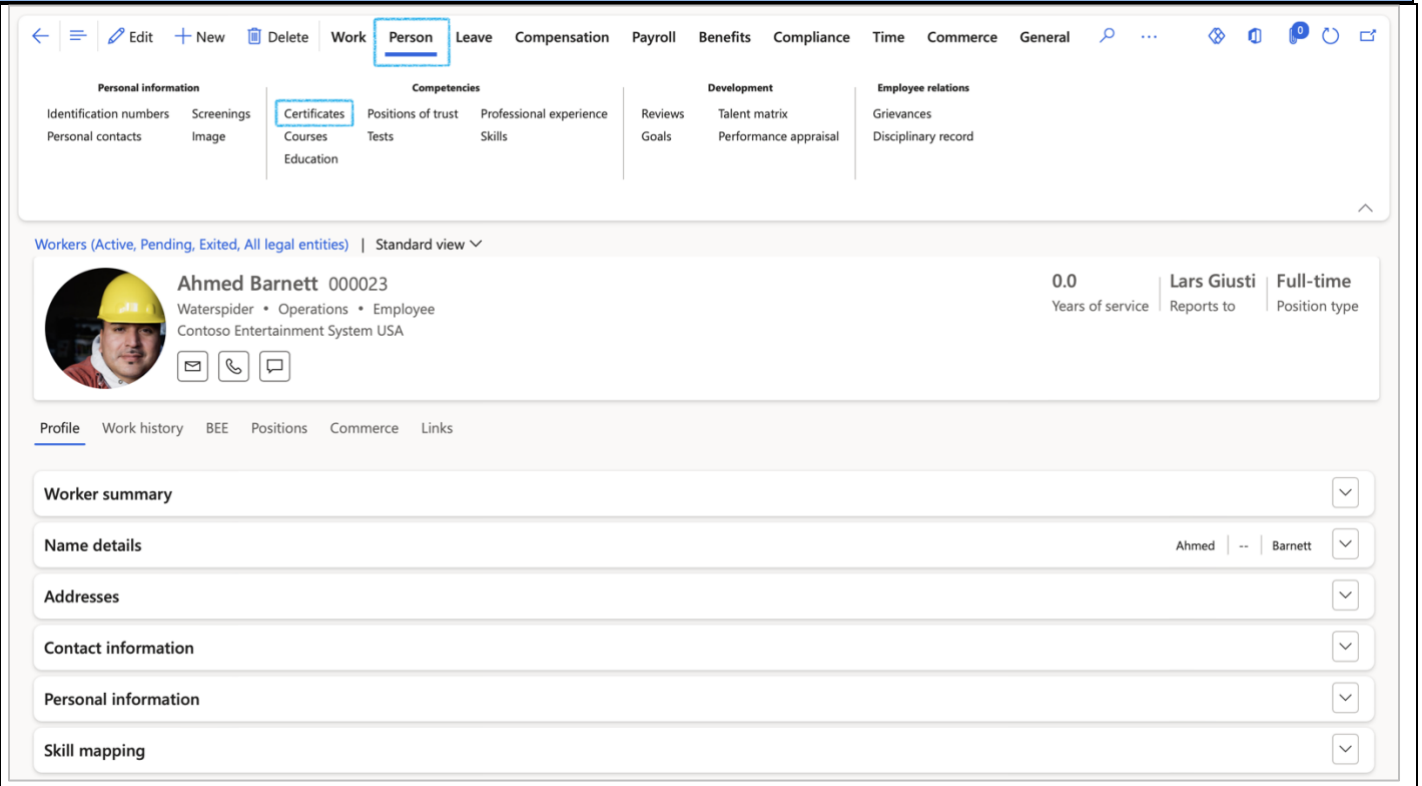
3.5.2 View the worker certificates in the D365 mobile app

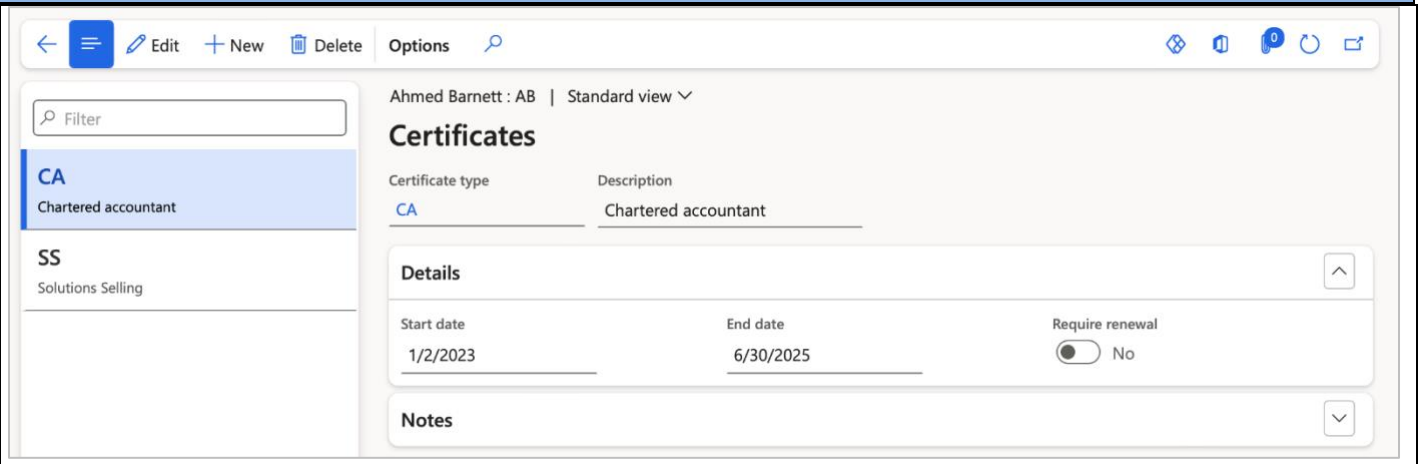
TALKING POINTS AND STEPS	MOBILE APP
The worker's details will be displayed, along with his/her current certificates and valid medical tests. The following information is displayed for the certificates: • **Description –** Name of the certificate • **Expiry date –** When the certificate is set to expire • **Require renewal –** Indicates if renewal is required or not • **Notes –** Any notes entered for the certificate	

3.5.3 View the worker valid fitness medicals on the D365 Lab mobile app

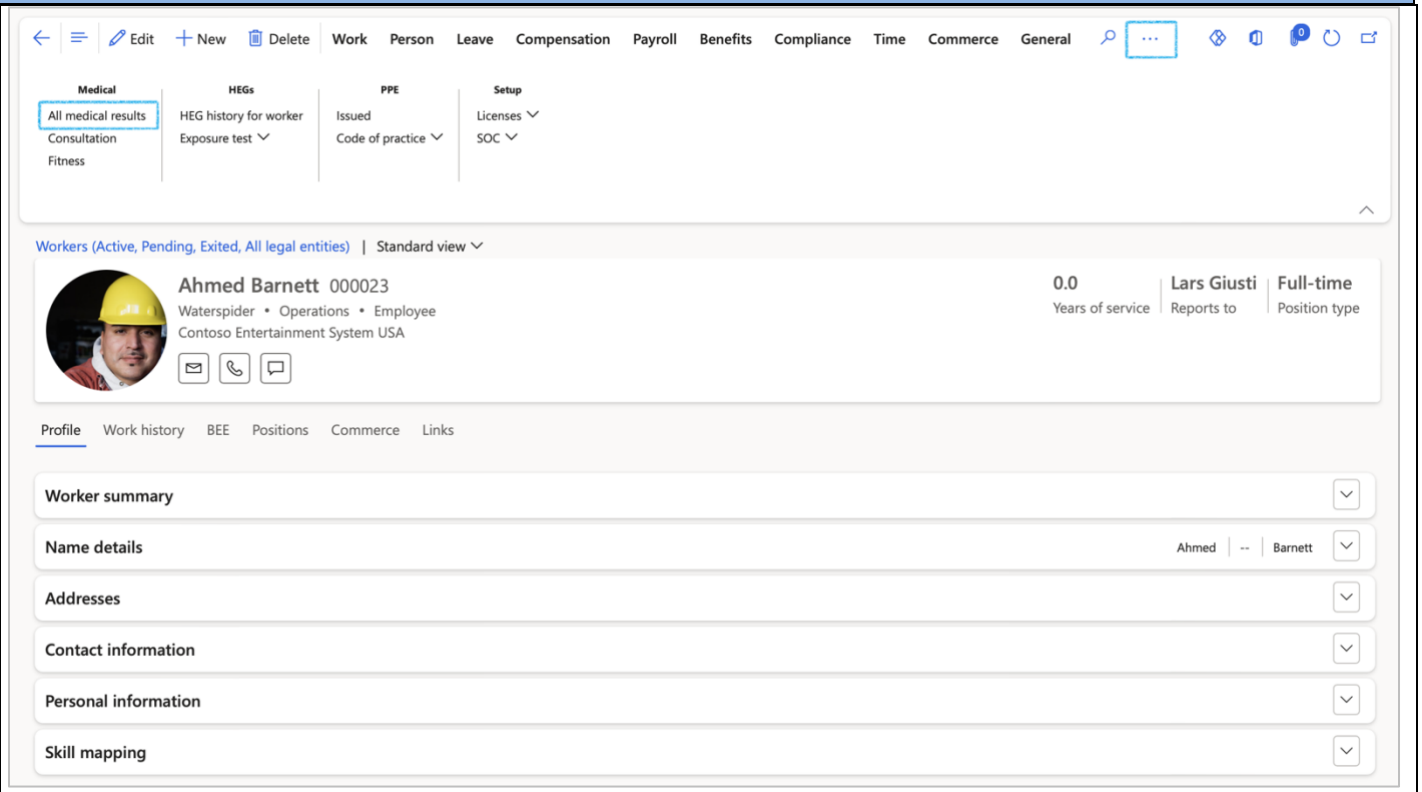
TALKING POINTS AND STEPS	MOBILE APP
Click on the **Valid medicals** segment button. The following information is displayed for the valid medical tests: • **Test date –** Date of fitness medical • **Expiry date –** Date the fitness expires • **Practitioner** – Practitioner who completed the fitness medical • **Approval status –** Status of the medical • **Fitness status –** Fitness status of the worker	

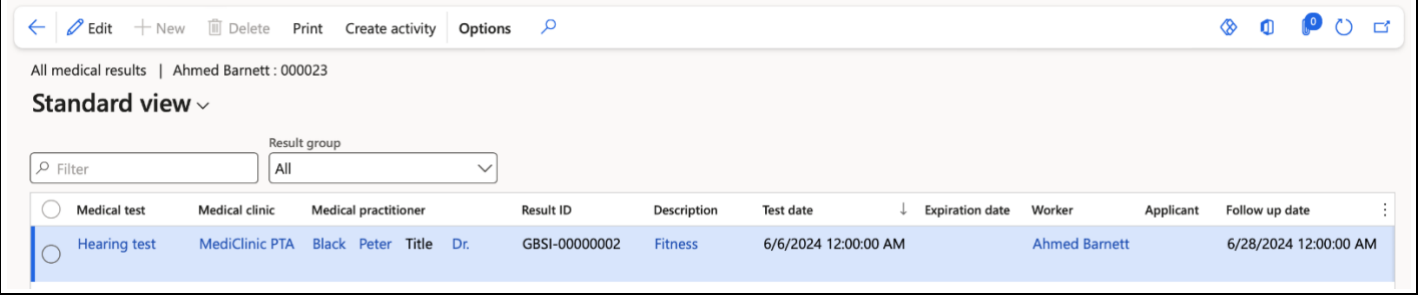
3.5.4 View the worker certificates in Dynamics 365

TALKING POINTS AND STEPS	DYNAMICS 365
Go to: **Human resources > Workers > Workers** Select the relevant worker. Click on **Person** in the action pane. Select **Certificates** in the Competencies field group buttons.	

TALKING POINTS AND STEPS	DYNAMICS 365
Certificates for the worker will be listed in the filter pane. Select a certificate to view the certificate information.	

3.5.5 View the worker fitness medicals in Dynamics 365

TALKING POINTS AND STEPS	DYNAMICS 365
Go to: **Human resources > Workers > Workers** Select the relevant worker. Click on **Health and Safety** in the action pane. Select **All medical results** in the Medical field group buttons.	

TALKING POINTS AND STEPS	DYNAMICS 365
All medical results for the patient will be listed.	

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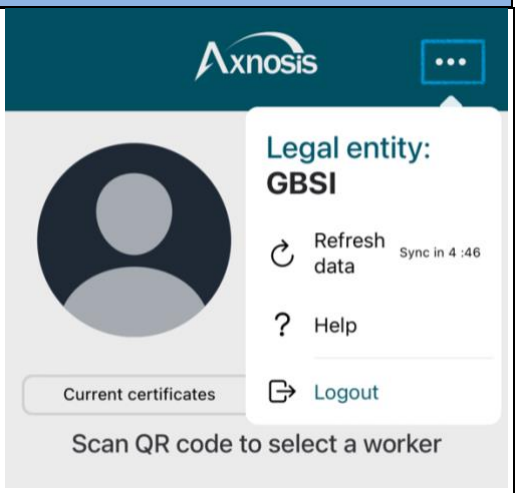
3.6 Viewing the App options

TALKING POINTS AND STEPS	MOBILE APP
The **ellipsis** at the top of the screen provides the following functions: • Displays the **D365 Legal entity** that the user is currently logged into • The **Refresh data** button is used to update the app with recently captured data (via the app and D365) • The **Help** button opens the **Axnosis Contact Support** screen • **Logout**