



# MassDEP

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**Massachusetts Department of Environmental Protection  
Bureau of Water Resources  
Division of Watershed Management  
Watershed Planning Program**

**STANDARD OPERATING PROCEDURE**

**WinLIMS Sample Pre-Logging**

**CN 001.992**

July 2025-July 2027

7/10/25

**Prepared and  
Approved by:**

**Date:** 7/24/25

Thomas Dallaire, Database Coordinator

**Approved by:**

**Date:** 7/24/25

QA Analyst

**Approved by:**

**Date:** 7/25/25

Richard Chase, Data Management & Water Quality  
Assessment Section Chief



### List of Revisions

| Revision Date | Revision  | Pages #s        | CN/ (Old CN if applicable) | Initials |
|---------------|---|-----------------|----------------------------|----------|
| 7/17/20       | Revise COC document location description  | 5               |                            |          |
| 4/26/21       | Preservation/Filtered status changes  | 3               |                            |          |
| 3/21/22       | [Point of Contact] – Changed to “Flint, Suzanne”  | 2               | CN 001.98                  |          |
| 3/23/23       | Admin changes ONLY: Staff names changed, updated field names, sample replication updated, labels export updated, bottle group table removed | 1, 3, 4, 5, 6-7 | CN 001.99                  |          |
| 4/9/24        | Admin changes ONLY: Staff changes (Roles, phone numbers)  | 1, 2, 5         | CN 0001.991                |          |
| 4/10/2025     | No changes for 2025   | --              |                            | TD       |
| 7/10/2025     | WinLIMS Links changed   | 1               | CN 001.992                 | TD       |



**SCOPE and APPLICATION:** Document the WinLIMS pre-logging process for samples going to WES

**TRAINING:** Any staff pre-logging DWM/WPP sample information into the WES LIMS system shall be trained by WES Laboratory Data Manager and/or her designee, prior to any work. Prior to starting steps described below, the following is assumed:

- You have been granted WinLIMS login credentials in your own name
- You have received “Intro to WinLIMS Training” directly from WES Laboratory Data Manager
- You have received “WinLIMS Sample Pre-Logging Training” from designated DWM/WPP staff

**WinLIMS Links: (Must use Google Chrome)**

**Test Environment:** <https://maeea01.confience.io/WinLIMS7.44.TEST/>

**Production Environment:** <https://maeea01.confience.io/massdepwinlims/>

**Contacts:**

WES

- Beth McDonough, WES Laboratory QA & Data Manager (617-733-2042)
- Tess Burdin, WinLIMS Contact (781-686-4136)

DWM/WPP

- Tom Dallaire, Data Manager (617-780-0955)
- Kari Winfield, Data Manager (857-278-5420)
- Suzanne Flint, Field and Lab Coordinator (781-367-6795)
- Jasper Sha, QAQC Officer (857-274-0905)
- Richard Chase, Data and Assessment Section Chief (978-939-4356)
- Shervon De Leon, Water Quality Monitoring Section Chief (617-780-1074)

**Applicability:** This SOP applies to samples to be submitted to WES ONLY

**Definitions:**

- **COC:** Chain-of-Custody
- **Login #:** Login batch or batch of samples to be submitted to WES, producing a single COC [NOTE: For pre-logging sample information for all DWM/WPP water quality surveys “Crew Trip” will be used to define “Batches” in WinLIMS (Login # = Crew Trip).]
- **Sample:** An individual\* sample bottle collected under field conditions. (\*Exception: When more than 1 bottle is required by the lab for the analyte/test, then this is considered a “sample”)

**Preparation, Launching WinLIMS**

**Getting Started:**

- 1) Check with DWM/WPP, Field and Lab Coordinator (Sue Flint) to confirm that WES has been notified of sampling schedule and requested analytes
- 2) Complete a **sample summary list** including sampling stations, sample ID's (OWMID's), collection date, analytes/tests and crew #. [NOTE: For pre-logging sample information for all DWM/WPP water quality surveys “Crew Trip” will be used to define “Batches” in WinLIMS (Login # = Crew Trip)]. (FishTox – A separate section will be added to the SOP for Fish Tissue Samples in the near future)
- 3) Launch Google Chrome, Clear Cache:
  - In Chrome:
    - (<Ctrl> H)
    - Select “Clear browsing data”
    - Select “Advanced” tab
    - Select Time range “All time”
    - First time through, check boxes for all items. After that, leave “Site Settings” unchecked unless it has content from more than 2 sites.





o Select Clear data button

- 4) Launch WinLIMS using Google Chrome and login using Username/Password provided by Lab Data Manager
  - Test Environment: <https://maeea01.confience.io/WinLIMS7.44.TEST/>
  - Production Environment <https://maeea01.confience.io/massdepwinlims/>

## Data Entry

### Creating a new Login Batch:

- 5) Select a new login from the **Sample Life Cycle->** menu: **Manage Logins->new**
- 6) Enter the following fields: (Note: Only fields needing user input are listed here)
  - **[Client ID]** Select “BWR DIV WATERSHED MGMNT - WATERSHED PLANNING” from pick list. (Note: “BWR-DWM-WP” will actually populate field)
  - **[Project Name]** Select from one of DWM/WPP’s pre-defined project names. If project is not in the list, contact Tom Dallaire or Kari Winfield at DWM/WPP to get it added to the list prior to logging samples. [Note that the OWMID is tied to the project so you must have the correct project and OWMID prefix before proceeding].
  - **[Point of Contact]** For all pre-logs, select “Flint, Suzanne” as point of contact
  - **[“Sample Disposal”]** “Dispose of samples 30 days after analyses are approved” should be used in most cases
  - **[Priority]** (Default=Standard)
  - **[Comments]** Enter comments as needed (e.g. survey group #, high analyte levels expected at a specific location, etc). (Note: Comments are for entire Login Batch #)
  - Click  (Save Button) icon
  - Enter the **[No. Of Samples]** to initially add samples to a login batch (more can be added later)
  - Click **[Next]** button
  - Step 2 of 2: Fill in fields as needed, **[Grab/Comp]** is the only required field at this point (Note: Recommend leaving all fields blank at this point and fill in later based on “Data Entry Scheme” using tips and tricks that will be defined during training)
  - Click  (Save Button) icon




## Data Entry Schemes

WinLIMS provides several features (tips and tricks) for streamlining the entry of sample batches. The use of these features can be optimized to reduce the time needed and accuracy of a data entry session. The selection of a specific scheme will depend on the structure or symmetry of the survey design. Data entry schemes will be covered in detail during training including the risks associated with using them.


### Data Entry Schemes Include:

- ❖ Enter 1 sample Client Sample ID (OWMID) at a time, all fields and tests
- ❖ Enter 1 sample Client Sample ID (OWMID) by bottle group, replicate this sample and edit as needed
- ❖ Enter multiple samples using generic Client Sample ID's (OWMID's), Client Sample Descriptions, Matrix and Date Collected – Replicate samples for each bottle group before completing data entry into all fields
- ❖ An entire Login # (COC Batch) can be replicated

### Adding/Editing Login Samples:




- 7) Enter ONLY the following fields: (Note: Only fields needing user input are listed here)
- **[Client Sample ID]** = OWMID # # followed by bottle group code (e.g. 10-9999\_B, where B is the code for the bacteria bottle)—see separate section or handout
  - **[Client Sample Description]** Project Station Name (i.e. "MR01") – will be used on bottle labels to help identify samples in the field
  - **[Matrix]** Use ONLY the following selections: (If choice not good fit, please contact DWM/WPP Data Manager)
    - Water samples: Select "**NPWW**" (Non-Potable Water or Waste Water)
    - Salt water samples: Select "**ME**" (Marine/Estuarine Water)
    - Fish tissue samples: Select "**BIO**" (Biological Specimen)
  - **[Collector]** Not always known when pre-logging samples – can be hand written on COC in the field
  - **[Date Collected]** planned date for site visit (mm/dd/yyyy) – can be hand written on COC in the field
  - **[Time Collected]** Leave blank, to be entered by lab upon sample delivery (Must be hand written on paper COC)
  - **[Container Type Code]** Select appropriate bottle type from list – DO NOT Make "Best Choice" (Contact Beth or Tom if specific bottle to be used in not in list)
  - **[Preservative Code]** Select all that apply (i.e. 1,2 – 1,10), includes sample storage and handling
  - **[To be preserved]** Select FLD, LAB or NA
  - **[To be filtered]** Select FLD, LAB or NA
  - **[Number Bottles Submitted]** Enter number of bottles to be submitted (Default is 1). Several methods REQUIRE more than one bottle for the same 'sample.' (i.e. VOC, SVOC, PFAS, etc. For these cases enter actual # bottles submitted.)
  - **[Grab / Comp]** Grab "G" or Composite "C" (default is "G"- change to "C" for composite fish samples, etc.)
  - Click the  (Update) icon

### Add Tests to a Login Sample:



- 8) First, select all samples to add tests to (using check box)
- 9) In the Login Samples header section, click the  (add test) icon
- 10) Select the requested tests or test groups from the **[Tests for Matrix]** pick list (using check box).
- 11) Click the **[Submit]** button when all tests have been selected.
- (Note: Changing the matrix deletes the assigned tests. If you change the matrix, save then add the tests again)



### **Copy Sample Configuration:**


- 12) First, select all samples to be replicated/duplicated (using check box)
- 13) In the Login Samples header section, click the  (Dupe Sample) icon
- 14) Select either "Copy Sample Configuration, OR "Create Duplicate Sample without Tests" then click "OK".  
(Selection to be based on "Scheme")
- 15) Go back through the samples just duplicated and edit/add the information for the following fields as needed:
  - [Client Sample ID]
  - [Client Sample Description]
  - [Matrix]
  - [Date Collected]
  - [Time Collected] Leave blank, to be entered by lab upon sample delivery
  - [Container Type Code]
  - [Preservative Code]
  - [To be preserved] Select FLD, LAB or NA
  - [To be filtered] Select FLD, LAB or NA
  - [Number Bottles Submitted]
  - [Grab / Comp]
  - Click the  (Update) icon
- 16) NOTE: If too many samples were added, select all samples to delete (using check box) and then click  (delete) icon
- 17) Add Tests to Login Samples (Repeat steps 8 thru 11 as needed)

### **Delete Tests from a Login Sample: (Be Careful here! Emphasis during training – Individual vs group)**

- 18) First, in the Login Samples section, select all samples to delete tests from (using check box)
- 19) In the Login Samples header section, click the  (manage common tests) icon
- 20) Note: "Apply values to all samples in the Group" check box will remove tests from ALL samples from Login #  
– not just selected samples
- 21) Select Tests to be deleted (using check box)
- 22) Click the  (DeleteCommonSamples) icon
- 23) [Note: If in doubt on what tests are assigned, review COC on screen – delete all tests and start over]

### **Data Entry Proofing**

#### **Print COC Form:**

- 24) Confirm that the correct Login # (i.e. batch number) is selected
- 25) Click the  (COC) icon, "Sample Tracking & Chain-of-Custody Record" will pop-up in a new window
- 26) Click the "Print" icon in top left hand corner of pop-up window, "Print to PDF" will pop-up in another new window
- 27) Click the "Export" button, find and open exported PDF file



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- 28) Print Exported PDF – confirm that all fields have been entered correctly (compare to your sample summary list) And check for the following:**
- Confirm all items on page 1 of COC are correct
  - Confirm all samples are present
  - Confirm client sample ID's are correct and include DWM/WPP bottle group designation
  - Confirm all other entered sample specific fields/data elements were entered correctly on "Sample" page(s)
  - Confirm that all samples are present on and are assigned to the correct tests on test page(s)

**Enter a New Batch:**


- 29) Repeat steps 5 thru 28 for additional crews/trips as needed** using a different Login # for each Crew Trip.

**Final Survey Preparation (COC and Labels)**

**COC, Print Form:**

- 30)** Select the Login # that COC is to be printed for
- 31)** Click the  (COC) icon, "Sample Tracking & Chain-of-Custody Record" will pop-up in a new window
- 32)** Click the "Print" icon in top left hand corner of pop-up window, "Print to PDF" will pop-up in another new window
- 33)** Click the "Export" button, find and open exported PDF file
- 34)** Print Exported COC PDF – this copy to be used by field staff
- 35)** Rename and secure a copy of the PDF file to project planning files. Naming convention: Login # and "PreLog" string in file name (i.e. "20190058PreLog.pdf")

**Bottle Labels, Export Excel File:** (Both side and top labels)

- 36)** Select: Sample Life Cycle-> Manage Logins
- 37)** Select the Login # that will be exported to an Excel File
- 38)** Click on  (Export to Excel) icon to export data to Excel for bottle label production, find and open exported Excel file (Note: Exported file has 1 row for each sample ONLY)
- 39)** Rename and secure a copy of the Excel file in project planning files. Naming convention: Login # and "PreLog" string in file name (i.e. "20190058PreLog.xlsx")

**Making Corrections:**

- 40)** Changes/corrections to COC forms can be made prior to initiation of sampling run; however, these changes MUST be made to the finalized COC form, entered into WinLIMS and reflected on the labels affixed to bottles. Once samples have been submitted to WES, NO CHANGES ARE TO BE MADE TO DATA IN WinLIMS!!! If changes are needed after delivery of samples to WES, please see Tom Dallaire to facilitate these changes! WES has final login authority for all samples logged into WinLIMS.

**DWM/WPP Bottle group definitions, as of 3/23/23**

- Bottle group table removed from this document on 3/23/23 – will be provided to staff as needed (Please ask Sue Flint for current bottle group definitions to be used by individual projects)