CTS Portal User Guides

CTS Portal - Forensics

2017

CTS Portal User Guides

CTS Portal - Forensics

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How to Sign In

This guide walks you through signing onto the CTS Portal. It also explains how to register when you sign into the site for the first time.

First Time? Register

Note: *The first time you sign onto the CTS Portal, you may need to complete registration.*

CTS creates Portal accounts for all Lab Account Owners (Primary Contacts). After enrolling with CTS, new clients can expect to receive an e-mail from the Portal with a link to complete the setup of the Portal account.

Lab Account Owners who have assumed the role from a previous Lab Account Owner will also receive an e-mail to confirm the transfer.

If you are not the Lab Account Owner, you will need to register an account by following the steps below.

When you access the website, the Home page will open. Click on "Register" on the Home page. There are two places where "Register" can be found on this page. Both links will direct you to the registration page.

Type in your e-mail address and a user-defined password in the proper boxes. Retype the password in the password confirmation box. **Note:** *The Password is case sensitive.*

Choose either "Forensics" or "Industry" from the drop-down list and click the "Sign Up" button.

Already Registered? Log In

Enter your e-mail and password in the proper boxes on the home page and click on the "Sign In" button.

How to Reset or Change Your Password

This guide walks you through resetting your password.

There are two different ways to reset your password, depending on whether you forgot your password and need to reset it to sign in to the Portal, or if you are already signed in and would like to change your password.

Reset Forgotten Password:

Click on "Reset password", below the "Forgot Your Password?" heading on the left side, below the log-in fields.

Type in your e-mail address and click on the "Reset My Password" button.

An e-mail will be sent to you. Open the e-mail and click on the link provided to go to the page indicated.

The following message is from Collaborative Testing Services' online Portal.

You are receiving this e-mail because you requested a password reset for your user account.

Please go to the following page and set a new password:

https://www.cts-portal.com/reset/MTAxMTk-4kf-77a7475e95062c7c6654/

Your username, in case you have forgotten: *AnalystA@cts-portal.com*

Collaborative Testing Services
www.cts-portal.com

Type in a new password in the appropriate box. Confirm your new password in the next box and click on the "Change my password" button.

New password:

Confirm password:

Change my password

You will receive the following message: "Your password has been reset, you can log in immediately". Click on "Log in" to do so.

CTS Online Portal

Your password has been reset, you can log in immediately.

Change Your Password through My Accounts

Click on "Update My Profile" on the left side of the Portal, under the "Account" heading.

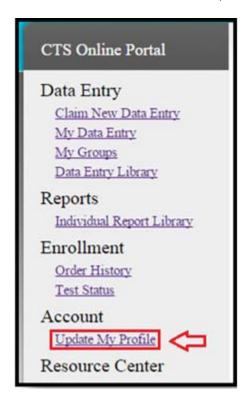

Click on "Change Password" to open the Change Password page.

Type in your old password in the first box, then your new password in the next two boxes. Once finished, click on the "Change Password" button.

You will see a confirmation message that your password was changed successfully. You may see an error messages when the old password is incorrect or when the new passwords entered do not match.

How to Choose a Lab Setup

This guide explains the different Forensic Group setups available on the CTS Portal. You can do a simple set up with no group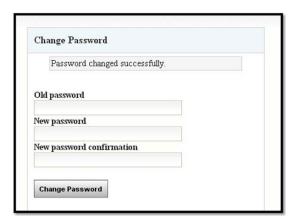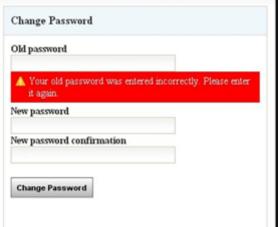s or more complex setups with Groups and Master Groups. An overview of the different options is presented below with more detailed information including work flow examples provided in the following pages.

No Groups - Analyst Focus

This is the simplest setup on the CTS Portal. Each individual analyst registers his or her own account, claims, enters, and submits their Data Entry to CTS. There are no permissions to set or additional setups to do.

Review or Submission Groups only, no Master Group

In this option, each review Group is separate; no Master Group oversees or controls the groups. This option is appropriate for laboratories who would like a more formal review process, or to control the permissions of their analysts without needing the oversight or bulk powers found within a Master Group. You can create and organize multiple review Groups based on the workflow within your laboratory. Most commonly, we see review Groups separated by discipline or laboratory location in multi-lab organizations. If your laboratory is utilizing multiple groups, or the features of a Master Group may be important to your laboratory in the future, it is advised to create a Master Group from the start as consolidating review Groups under a Master Group at a later time can be difficult.

Master Group and Sub-Groups (Review or Submission Groups)

In this option, a Master Group oversees the groups. This option is appropriate for labs who want to have a single location for Management (Quality Manager) to be able to oversee and have additional bulk powers over the tests within the sub-groups. The sub-groups may be focused on review, or may be used for organization and additional control over the users within.

A Master Group has several features that the sub-groups do not. It can assign tests to individual analysts, as well as list all active tests and display notifications for each test. It can also complete several bulk actions, such as sending an e-mail containing tests in a PDF format, submitting tests, retracting tests, forwarding to groups, and retracting from groups.
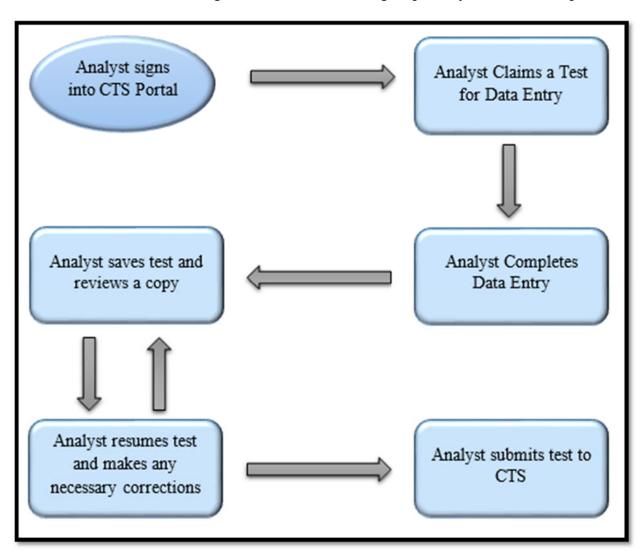
Similar to the Groups only option, more than one review/submission group can be used depending on your needs. Set up one Master Group and add as many individual groups as necessary.

No Groups – Analyst Focus

Since there are no set up steps for this option, each user can go right into their work flow.

Work Flow Example: Once registered ("How to Sign in"), an analyst claims a test using the Participant Code and Web code located on their data sheet ("How to Claim a Test for Data Entry"). The analyst completes the data entry response form ("How to Complete Data Entry") and performs the appropriate review steps. They can print out the test, e-mail it, or just view a read-only copy to review the test. Once the test is reviewed, the analyst can complete the submission to CTS ("How to Submit a Test to CTS") which includes providing any accreditation information as necessary.

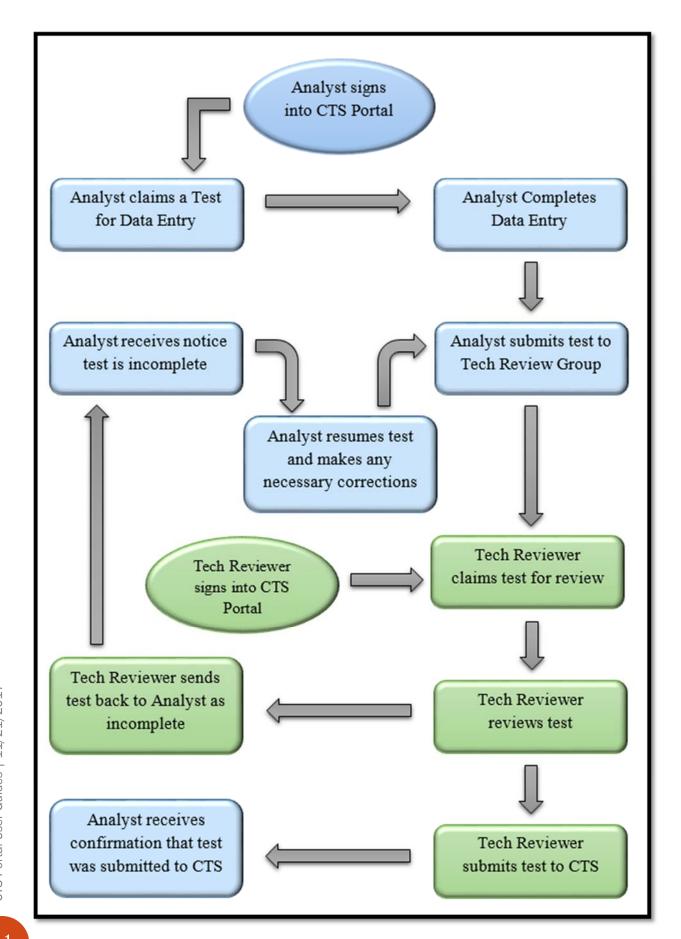Below is a flow chart showing the work flow of a no group, analyst focused setup.

```
┌─────────────────┐              ┌─────────────────┐
│  Analyst signs  │  ══════>     │ Analyst Claims  │
│ into CTS Portal │              │  a Test for     │
│                 │              │   Data Entry    │
└─────────────────┘              └─────────────────┘
                                         │
                                         ▼
┌─────────────────┐              ┌─────────────────┐
│ Analyst saves   │   <══════    │    Analyst      │
│  test and       │              │   Completes     │
│ reviews a copy  │              │   Data Entry    │
└─────────────────┘              └─────────────────┘
     │     ▲
     ▼     │
┌─────────────────┐              ┌─────────────────┐
│ Analyst resumes │   ══════>    │ Analyst submits │
│ test and makes  │              │  test to CTS    │
│ any necessary   │              │                 │
│  corrections    │              │                 │
└─────────────────┘              └─────────────────┘
```

Review or Submission Groups only, no Master Group

Setup Overview: A Group Manager sets up the group(s) and invites users to join or the user can ask to join the Group. Each individual user registers their account and accepts/joins the group. The Group Manager can set permissions for each member of the Group based on their role (Analyst/Reviewer). For example, you can have the tests be submitted to CTS by only certain people like Tech Reviewers, or you can allow analysts to submit their own tests. All of these steps are covered in detail here, "How to Start a Group for Forensic Programs"

Work Flow Example: A member of a Group (analyst) claims a test using the Participant Code and Web code located on their data sheet ("How to Claim a Test for Data Entry") and completes the data entry response form ("How to Complete Data Entry"). Once the test is finished, the analyst forwards the test to the review Group ("How to Hand in a Test for Review"). A Tech Reviewer will claim the test and review it. After the test is done being reviewed, it can either be sent back to the analyst as incomplete or complete, forwarded to another group, or submitted to CTS ("How to Review a Test and Perform Post Review Actions"). If the test is sent back to the analyst as incomplete, the analyst can correct the test and then resubmit the test to the review Group.

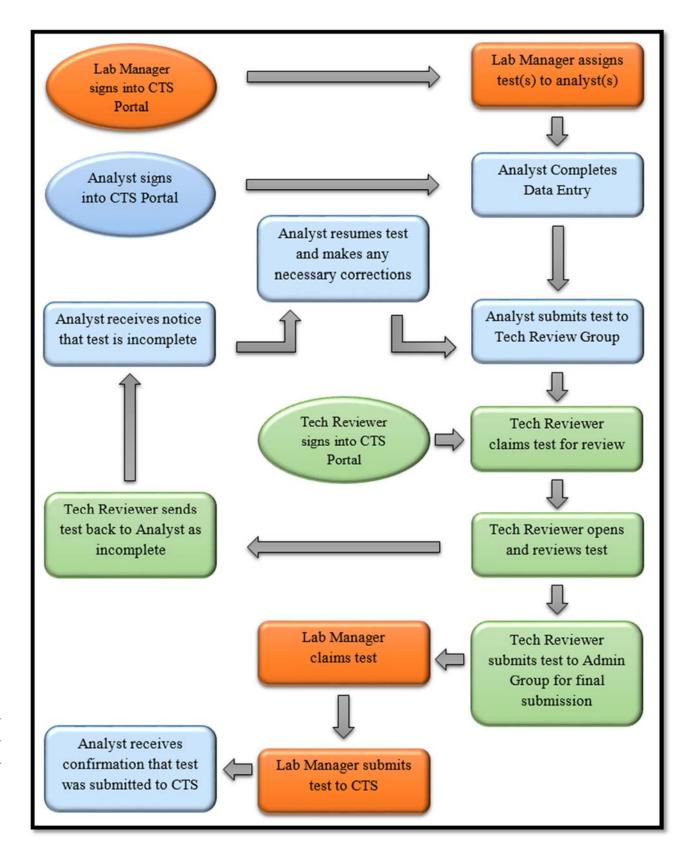Below is a flow chart showing the work flow of a single group, no Master Group setup.

Master Group and Sub-Groups (Review or Submission Groups)

Setup Overview: A Group Manager sets up the Master Group and creates the review/submission sub-groups associated with the Master Group. Once the sub-groups have been created, users can be invited to join or the user can ask to join each sub-group as appropriate. Once a user joins a sub-group, they are automatically added to the Master Group user list. However, adding a user to a Master Group will not automatically add the user to the sub-groups. All of these steps are covered in this guide "How to Create & Manage a Master Group & Sub-Group(s)"

Permissions are now assigned on both a Master Group basis and a sub-group basis. These permissions will control what activities each user can perform. Within the Master Group, permissions for the bulk features described above are available; within the sub-groups, permissions for review actions, accreditation completion, and submission are available. The steps on how to change a user's permissions within a Master Group can be found here: "How to Set Permissions for Forensics Master Group Members" The steps on how to change a user's permissions within a sub-group are covered in this guide: "How to Set Permissions for Forensics Group Members".

Work Flow Example: Once all groups are set up, an analyst claims a test using the Participant Code and Web code located on their data sheet ("How to Claim a Test for Data Entry"), or the test is assigned by the Master Group directly to the analyst ("How to Assign a Test to User(s) through a Master Group"). The analyst completes the data entry response ("How to Complete Data Entry". Once the test is finished, the analyst forwards the test to the Review Group ("How to Hand in a Test for Review"). A Tech Reviewer will claim the test and review it. After the test is done being reviewed, the Tech Reviewer forwards the test to the Admin Group or back to the analyst as incomplete ("How to Review a Test and Perform Post Review Actions"). If the test is sent back to the analyst as incomplete, the analyst can correct the test and then resubmit the test to the Review Group for additional review. Once the test is complete and forwarded to the Admin Group, additional reviews can take place at this level, or the Manager can use this group to fill out the accreditation and submit to CTS. The Manager can also utilize the bulk features of the Master Group at this stage to submit the test to CTS instead of through the group directly ("How to Perform Master Group Dashboard Actions").

In the scenario used in our flow chart below, there is one Master Group set up with two sub-groups. One group is a Tech Review Group and the other is an Admin Group. We are using the Tech Review Group as a review only group, so the Analyst, the Tech Reviewer, and the Lab Manager are all users of that group. The Admin group is used to submit the tests to CTS, so only the Tech Reviewer and the Lab Manager are users of that group.

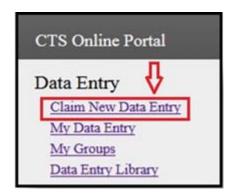# How to Claim a Test for Data Entry

This guide walks you through claiming a test and shows how a test assigned to you can be located.

To add a test to your profile, the test must first be claimed. There are two ways to assign a test to your profile. You can claim the test for yourself, or if you are part of a Master Group, a test can be assigned to you from a Group Manager.
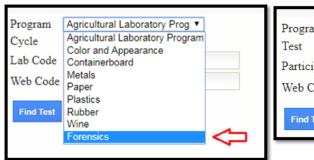
Note: For instructions on assigning a test to another user, or for assigning in bulk, please see the "How to Assign a Test to User(s) through a Master Group" guide.

To Claim a Test for Yourself:

Click on "Claim New Data Entry", under the "Data Entry" heading on the left hand side of the screen.

If you are not assigned to a lab account, choose Forensics from the drop down list, then select the correct test from the drop down list of available tests.
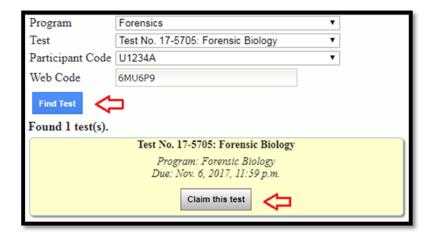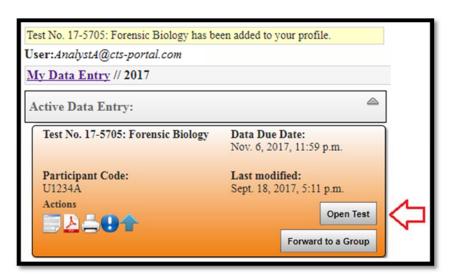
If you have permission to access the preloaded codes for your Lab Account, choose your Participant Code from the drop down list and the Web Code will fill in automatically. If you do not have access to the preloaded codes, enter your Participant Code and Web Code from the data sheet.

Program	Forensics ▾
Test	Test No. 17-5705: Forensic Biology ▾
Participant Code	U1234A ▾
Web Code	6MU6P9

Find Test

Click on the "Find Test" button. The test associated with your codes will appear. Click on the "Claim this test" button.

Program	Forensics ▾
Test	Test No. 17-5705: Forensic Biology ▾
Participant Code	U1234A ▾
Web Code	6MU6P9

Find Test

Found 1 test(s).

Test No. 17-5705: Forensic Biology

Program: Forensic Biology
Due: Nov. 6, 2017, 11:59 p.m.

Claim this test

The My Data Entry page will open. You will see a note on the top of the page indicating the test has been added to your profile. The test will be listed under the Active Data Entry section. Click on the "Open Test" button to open the test response form.
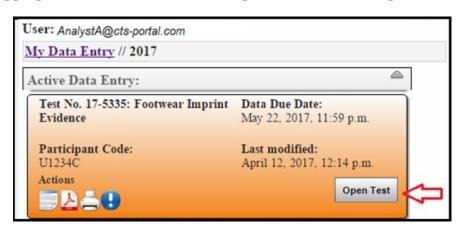
Test No. 17-5705: Forensic Biology has been added to your profile.

User:*AnalystA@cts-portal.com*

My Data Entry // 2017

Active Data Entry: ⌃

Test No. 17-5705: Forensic Biology	**Data Due Date:** Nov. 6, 2017, 11:59 p.m.
Participant Code: U1234A	**Last modified:** Sept. 18, 2017, 5:11 p.m.
Actions	**Open Test**
	Forward to a Group

If no tests are found, confirm the following:

Program	Forensics ▾
Test	Test No. 17-529: Toolmarks Examination ▾
Participant Code	U1234A
Web Code	JKYLT6

Find Test

Found 0 test(s).

Can't Find the Cycle/Test You are Looking for?
The following Cycles and Tests have recently closed for Data Entry and cannot accept any further submissions.

Program	Industry Cycle or Forensic Test	Data Entry closed at 11:59pm ET on the Date listed below.
Forensics	Test No. 17-5251: Serial Number Restoration	September 11 2017
Forensics	Test No. 17-5661: Blood Drug Analysis	September 11 2017

Contact us for any questions.

- You have entered the correct Participant Code and Web Code for your test.

- The data due date for the test has not passed.

- You are the only one assigned to this Participant Code and Web Code.

   Note: *The Lab Account Owner and authorized users can check to see if another user has claimed the test using the Data Entry Library and navigating to the test in question. If a test needs to be reset, the Lab Account Owner can do so ("How to Unassign a Test").*

Test Assigned by a Master Group to You

If your laboratory has a Master Group with Sub-Groups setup, they have the ability to assign tests directly to users. If you have been assigned a test through this feature, the test will be automatically added to your profile.

You will receive an e-mail indicating that a test has been assigned to you.

> **The following message is from Collaborative Testing Services' online Portal.**
>
> Test No. 17-529: Toolmarks Examination was assigned to you for participant code U1234E.
>
> Collaborative Testing Services
> www.cts-portal.com

To find the test, go to "My Data Entry" for the current year and the test will be listed under the Active Data Entry section.

Click on the "Open Test" button to open the test response form.

How to Access Digital Download Samples

This guide walks you through accessing test materials for Digital Download tests.

If your test includes a digital download, you can access the materials by opening the response form for the test. Lab Account Owners will receive an eNote notification with an excel file of laboratory-specific codes attached. These codes will be preloaded in the CTS Portal for the Lab Account Owner and can be claimed by authorized users or assigned through a Master Group.

Note: *All tests must be claimed prior to accessing test materials. For instructions on this process, please see the following guides: "How to Claim a Test for Data Entry" or "How to Assign a Test to User(s) through a Master Group"*

Click on "My Data Entry", on the left side under the "Data Entry" heading. Navigate to the current year's data entry section by clicking the appropriate year.

Locate the appropriate test and click on the "Open Test" button to open the test.

The response form for the test will open. Locate and click on the blue link toward the bottom of the scenario. Depending on the testing discipline, the text around the link may vary from that seen in the image below.

The zip file will begin to download through your browser and may look like the example below.

When the download is complete, extract the contents of the zip file to access your test materials.

Return to the response form and complete data entry.

How to Complete Data Entry

This guide walks you through navigating the test response form and completing data entry.

Note: *The images shown below are for illustration purposes only. Your test may differ in content, number of pages, number of tabs, and names of tabs.*

Navigate through the test response form by clicking the appropriate tab or using the previous and next links at the bottom of the page.

The following action buttons are found on the top of the page:

- "**Save**" - saves your test as you progress through it.

- "**Save & Close**" - saves and closes the test for you to continue it later.

- "**Forward to a Group**" - submits your test to a Group for review. **Note:** *This button will not appear if you do not belong to a group or if you do not have permission to forward to a group.*

- "**Continue to Final Submission**" - access final submission steps which include the Accreditation Release Form and confirmation of submission to CTS. **Note:** *This button will not appear if you do not have permission to submit to CTS.*

Below are examples of the top of the page depending on whether you belong to a group or not and what your permissions are for the group.

Note: *Make sure you click on "Save" periodically. As a security feature, if you have not clicked on "Save" in over 25 minutes, a countdown clock will appear on top of your screen indicating that you have a few minutes to click on "Save". If you do not, your test will be auto saved and you will be automatically logged off.*

Read each page thoroughly and fill in all questions as applicable to your testing.

In places where a circle appears next to different choices, click on the appropriate circle. A dot in the center of the circle will appear in the selected circles. Only one circle can be chosen for each grouping of responses, clicking on a different response will move the dot. This style of response section does not allow you to fully remove a response dot.

In places where there is a box, fill in the appropriate response in the box.

On certain pages, there is an "Add Row" command, which will allow you to add additional rows as needed.

After you complete a page, click on the next tab to move to the next page.

Alternatively, you can move to the next page by clicking "Next" on the bottom right hand corner of each page. **Note:** *Changing pages/tabs does not automatically save data.*

Continue throughout the test until completed.

If you would like to continue entry for the test later, click on "Save and Close" at the top of the page.

Your test will appear listed under Active Data Entry, to resume your test, click on "Open Test".

Test No. 17-5702: Forensic Biology
Data Due Date:
May 8, 2017, 11:59 p.m.

Participant Code:
U1234E
Last modified:
April 13, 2017, 3:39 p.m.

Actions

Open Test

You can perform several other actions. A description of each action button is listed below.

Test No. 17-5702: Forensic Biology
Data Due Date:
May 8, 2017, 11:59 p.m.

Participant Code:
U1234E
Last modified:
April 13, 2017, 3:39 p.m.

Actions

Open Test

View: Opens up a read-only version of your test to view on your screen.

Email PDF: Emails a pdf version of your test to your email or any other email you choose.

Printer-friendly: Opens up a printer-friendly version of your test to print.

View notifications: Opens up a page with all your notifications for this test.

Upload data: Allows you to upload export tables from either GeneMapper® ID/ID-X or ArmedXpert. ArmedXpert users can use the free CTS plugin to export table(s) directly, or create a genotypes export table using GeneMapper® ID/ID-X. **Note:** *This feature is only available for Biology/DNA tests.*

Forensic Biology/DNA Entry - Differential Extraction

In DNA/Biology tests, you must answer whether you performed a differential extraction on Item 3 and Item 4. When you have a differential extraction question, click the circle next to Yes or No for both items. The appropriate response boxes will appear depending on your answers.

The differential extraction questions can appear on different tabs of the test response form as shown below. Anytime the question is asked, you will need to answer to get the appropriate response boxes to appear. If the differential question is answered, but no data is entered into the corresponding sections, they will not appear in the final report.

How to Upload DNA Data into Your Test

This guide explains how to upload DNA genetic analysis data into your Forensic Biology or DNA test. **Note:** *Uploading data through this process will override any data already entered into that same section of the test.*

Once the test is claimed, it will appear in the "My Data Entry" section. Click on the blue arrow icon under "Actions" and the "Upload data" page will open.

First, choose the sequence type and the amplification kit arrangement option. The sequence type will control the amplification kit options that are displayed under the Amplification Kit Arrangement section. The amplification kit chosen will control the loci order.

Next, click on the "Choose File" button to locate the file to upload (Supports ArmedXpert and GeneMapper® ID/ID-X Files – Setup in Appendix A of this document).

Locate the file under the appropriate folder. Click on the file containing the data you would like to upload, then click "Open".

After the file has been chosen, click on the "Load File" button to access sample information.

Select the sample for each item number on the top section of the page. Click the arrow to open the drop down list above each necessary item number.

Select the appropriate sample from the drop down list for that specific item number. You can select a sample for all necessary items in your test.

Once chosen, all alleles will be shown for that selected sample. Repeat for each additional item number.

If the CTS Locus does not match the File Locus, you can click on the arrow next to each CTS Locus to choose the correct Locus.

The middle section of the page shows the substitution options. The left side allows you to substitute a blank space with something else. The right side of the section allows you to choose how to display homozygotes. By default, a homozygous allele will be represented by a single allele i.e. 8. Click on the box next to any character if you want the homozygous allele to be shown as the two identical alleles i.e. 8,8.

Once these sections are complete, click on the "Next" button found below this section.

The next window shows all changes to the data based on your chosen options for a final review. Click on the "Save" button to successfully transfer this data into the test.

Note: *The uploaded data will override any data already manually entered into your test.*

Your files have now been uploaded to the test and you are sent back to the "My Data Entry" page. Click on the "Open Test" button to review the data that has been uploaded.

Appendix A

[ArmedXpert users can use the free CTS plugin to export table(s) directly, or create a genotypes export table using GeneMapper® ID/ID]

- Select an existing table setting or create a new table as described below.

- Click on the genotypes tab in GMID before selecting File > Export (Ctrl+E)

- The genotypes file generally has tab delimited columns such as: Sample File, Sample Name, Marker Allele 1, Size 1, Height 1, Allele 2, Size 2, Height 2, etc.

- "Sample File" and/or "Sample Name" columns are required in order to upload the STR genotypes.

- The "Marker" column is required.

- The "Allele" columns have to exist (at least one). The Allele column title format should look like this "Allele#" or "Allele #".

- Any additional columns, such as "Size" and "Height", are unnecessary, and will not affect the upload.

    Note: *The file needs to be exported as a text file.*

How to Submit a Test to CTS

This guide walks you through submitting your test to CTS. These instructions for submitting a test are only for analysts that are submitting their own test. Please review the appropriate guides for instructions on how to submit a test as a Tech Reviewer ("How to Review a Test and Perform Post Review Actions") or as a Master Group Manager ("How to do a Bulk Submission or Retraction by a Master Group")

Open Test

Go to your Active Data Entry located in the "My Data Entry" section of the CTS Portal and click on the "Open Test" button.

Continue to Final Submission

Click on the "Continue to Final Submission" button in the upper right hand corner.

If applicable, the Accreditation Release page of the test will open. Click on the circle next to the appropriate response.

If you click on the circle next to the first response, the bottom section will appear. Fill in all requested information in this section.

Note: If you belong to a group, you may not have permission to fill out the accreditation information. If it says, "This view is Read-only" in the upper left hand corner, it means you cannot fill out the accreditation information or make any changes to the accreditation information. The information must be filled out by someone with permission to do so.

If the information has already been filled out, you can proceed to the next step. If the information is not filled out and you do not have permission to fill out the accreditation information, click on the "Save & Close" button and inform the correct person at your lab.

Once the accreditation information is confirmed or filled out, click on the "Submit to CTS" button to send the test to CTS. If you do not see this button, you may not have permission to submit to CTS. *Note: The "Forward to a Group" button will not be shown if you do not belong to a group or you do not have permission to forward to a group.*
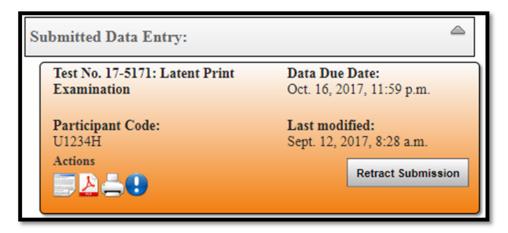
A confirmation screen will appear. Click on the "Yes" button to confirm that you would like to send the test to CTS.
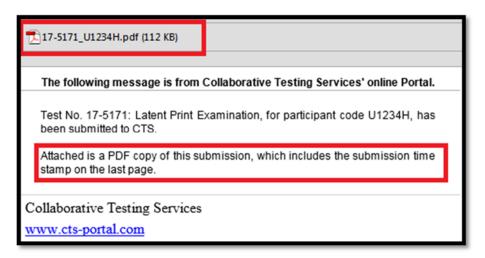
A message confirming that the test has been sent will appear. Click on the word "tests" to return to the "My Data Entry" section of the CTS Portal.
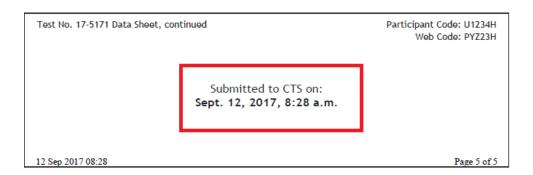
Your test will be moved to the Submitted Data Entry section.

Submitted Data Entry:

Test No. 17-5171: Latent Print Examination

Data Due Date:
Oct. 16, 2017, 11:59 p.m.

Participant Code:
U1234H

Last modified:
Sept. 12, 2017, 8:28 a.m.

Actions

Retract Submission

You will receive an e-mail confirmation, along with a PDF copy of your submission.

17-5171_U1234H.pdf (112 KB)

The following message is from Collaborative Testing Services' online Portal.

Test No. 17-5171: Latent Print Examination, for participant code U1234H, has been submitted to CTS.

Attached is a PDF copy of this submission, which includes the submission time stamp on the last page.

Collaborative Testing Services
www.cts-portal.com

The PDF will include a submission time stamp on the last page.

Test No. 17-5171 Data Sheet, continued

Participant Code: U1234H
Web Code: PYZ23H

Submitted to CTS on:
Sept. 12, 2017, 8:28 a.m.

12 Sep 2017 08:28

Page 5 of 5

How to Retract a Submitted Test

This guide walks you through how to retract a test that has been submitted to CTS. This can be done any time before the test's data due date. If you retract a test, make sure you resubmit it before the data due date. These instructions for retracting a submitted test are only for analysts that are retracting their own test. A Master Group Manager can also retract a test through the following guide: "How to do a Bulk Submission or Retraction by a Master Group"
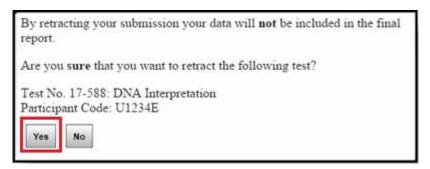
Retract Submission

If you would like to retract your test that has been submitted to CTS, click on the "Retract Submission" button.

Note: *If the retract submission button is greyed out and unavailable, it means you belong to a group and you do not have permission to Retract your test. The Group Manager can give you permission if it is necessary to retract your submission. Once permission has been granted, the "Retract Submission" button will become available.*
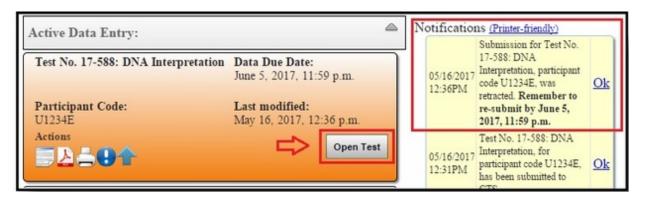

You will be asked to confirm you would like to retract the selected test.

After confirming you would like to retract the selected test, you will receive an e-mail and a notification that your test has been retracted. The test will now show under the Active Data Entry section.

Click on the "Open Test" button to make any necessary changes and resubmit the test to CTS.

Note: *Data can be retracted for corrections at any time prior to the Data Due Date. However, a final submission must be made prior to the Data Due Date in order for CTS to receive the data.*

How to Create & Manage a Master Group & Sub-Group(s)

This guide walks you through the complete steps of creating the Master Group and creating Sub-Groups for review, submission, or organizational purposes.

Start a Master Group

Click on "My Groups" on the left side of the page, under the "Data Entry" heading.

Then, click on "Start a Forensics Master Group" on the page that opens.

Name Your Master Group

Type in a user-defined Master Group name. In our example, we used "Master Group 1".

Click on the "Create Group" button.

A message confirming the Group has been created will be displayed.

Adding a Sub-Group

Click on "Master Group Dashboard" listed under the Master Group.

Click on "Manage Group" on the Master Group Dashboard page.

Click on "Add Group". It is located on the right hand side of the window and on the bottom of the page under Group Administration.

To add a new group, type in a new group name in the appropriate space and click on the "Create Group" button.

To add an existing group, select the group from the drop down menu and click "Add Group".

Note: *It is recommended that sub-groups be created directly through the Master Group. If adding an existing group, additional steps may need to be taken to merge users into the Master Group. See this guide for further information* ("Forensic Group Members not members of Forensics Master Group").

You will receive a confirmation that the group has been created.

Repeat these steps to create as many groups as needed for your lab.

Adding Users to Sub-Groups

Adding Users to Sub-Groups follows the same instructions within the guide "How to Add Users to a Group or Join a Group". The only difference is that you will see the Sub-Groups indented under the Master Group on your My Groups page.

Note: *Adding a user to any sub-group automatically adds them to the Master Group. Therefore, there is no need to add them to the Master Group separately.*
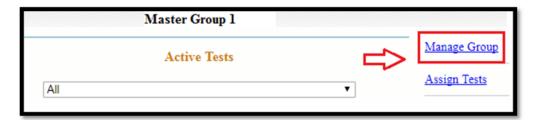
Adding/Removing Users to/from the Master Group

You may have users that you want as part of your Master Group, but perform no data entry or review functions that would include them as members of the sub-groups. To Add or Remove a user from a Master Group follow the instructions within the guide "How to Add Users to a Group or Join a Group". The only difference is that you will access the Add/Edit users section following the instructions below.

Click on "Master Group Dashboard" under your Master Group

Click on "Manage Group" on the Dashboard page.

Click on the "Add/Edit Membership" located under the Users section of the Group Management page.

Note: *Removing a user from the Master Group will delete the user from any Group associated with the Master Group. However, removing a user from a sub-group will not remove them from the Master Group or any other groups. To delete a user from all the sub-groups, delete them one time from the Master Group.*
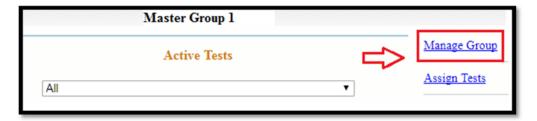
How to Set Permissions for Forensics Master Group Members

This guide explains how to assign user's permissions by a Master Group. This can only be done by a Group Manager.

Click on "My Groups", on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.

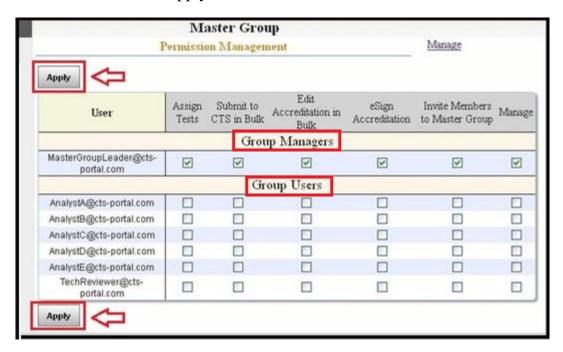Click on "Manage Group" located on the right hand side of the Master Group Dashboard.

Click on "Manage Permissions" located under the Users Section of the Group Management page.

The Permission Management page will open, displaying all users of the Master Group and sub-groups. Users with manager permissions are under the "Group Managers" section. The remainder of the users are listed under the "Group Users" section.

All boxes with a check mark indicate that the user has permission for that activity.

Click on a box to either add a check mark or remove a check mark. Once all permissions are set, click on one of the "Apply" buttons

Actions available by setting permissions:

- **Assign Tests** - allows user to assign tests to any users who are members of the sub-groups.
- **Submit to CTS in Bulk** - allows user to submit tests to CTS through the Master Group Dashboard.
- **Edit Accreditation in Bulk** – allows user to edit accreditation through the Master Group Dashboard.
- **eSign Accreditation** - allows user to complete the steps for electronic signature of their accreditation submission. This is an optional step.
- **Invite Members to Master Group** - allows user to add other users to the Master Group and send invitation e-mails to them.
- **Manage** - allows user to set Master Group permissions.

Note: *The user who started a Master Group is automatically set as Group Manager. This user has all the permissions. Users within a Master Group receive no permissions by default. Access to all permissions must be specifically turned on by the Group Manager.*

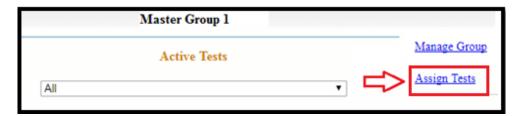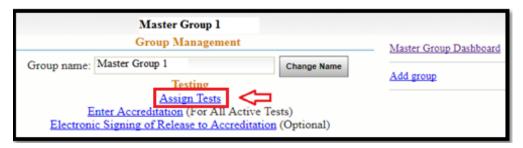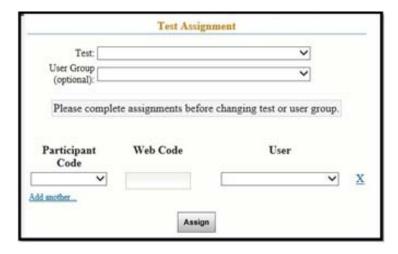# How to Assign a Test to User(s) through a Master Group

This Guide explains how to assign a test to a user through the Master Group. You will need to have the "Assign Tests" permission to complete this guide.

Note: *This function is separate from claiming a test to enter data individually and is intended for assignments to other users or for assigning in bulk. To claim a test outside of this feature for yourself, please refer to the "How to Claim a Test For Data Entry" guide.*

Click on "My Groups", on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.

Click on "Assign Tests" on the right hand side of the Master Group Dashboard.

Alternatively, the Assign Tests feature can be accessed through the Group Management page.

The Test Assignment page will open. Choose the proper test from the drop down list.

You have the option of choosing a user group, which will limit your available users to the members of the selected group. To use this feature, use the drop down list to choose the correct user group.

Note: *Only one test can be selected from the drop down box on the top of the page to be assigned to users at a time.*
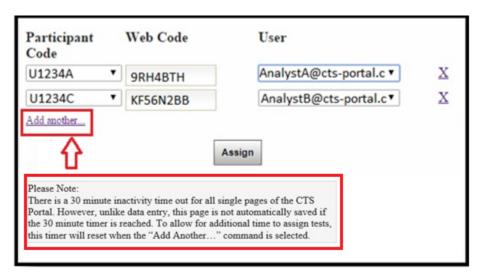

If you have permission to access the preloaded codes for your Lab Account, choose the Participant Code from the drop down list and the Web Code will fill in automatically. If you do not have access to the preloaded codes, enter the Participant Code and Web Code provided on the hard-copy data sheets or in the Excel attachment for digital download tests. Then choose the correct user from the drop down list.

If additional tests are to be assigned, click on "Add another" located under the Participant code. An additional row will appear and can be completed as above. Continue this process until all necessary tests have been assigned.

Note: *This section of the Portal does not have an automatic save feature and will timeout after 30 minutes of inactivity. To allow for additional time to assign tests, this timer will reset when the "Add another…" command is selected.*
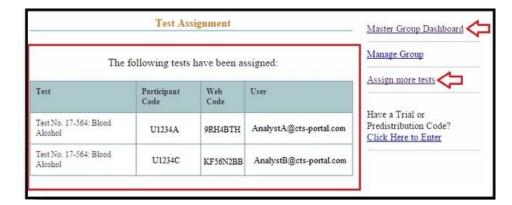

If you need to delete a row, click on the X to the right of the row. This will automatically delete the row.
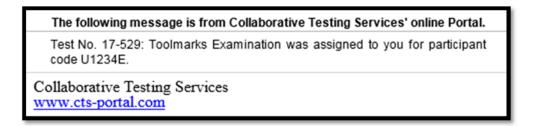
Once all tests have been added, click on the "Assign" button.

A message will appear with a list of all assigned tests. Click on "Master Group Dashboard" to see all the active tests or click on "Assign more tests" if you need to assign additional tests.

Test Assignment

Master Group Dashboard

Manage Group

Assign more tests

The following tests have been assigned:

Test	Participant Code	Web Code	User
Test No. 17-564: Blood Alcohol	U1234A	9RH4BTH	AnalystA@cts-portal.com
Test No. 17-564: Blood Alcohol	U1234C	KF56N2BB	AnalystB@cts-portal.com

Have a Trial or Predistribution Code? Click Here to Enter

The tests will now be available within each user's My Data Entry page under their Active Data Entry section, and each user will be sent an e-mailed notification of the assignment of the test.

The following message is from Collaborative Testing Services' online Portal.

Test No. 17-529: Toolmarks Examination was assigned to you for participant code U1234E.

Collaborative Testing Services
www.cts-portal.com

How to Unassign a Test

This guide walks the Lab Account Owner through unassigning a test that has been claimed/added to a user profile.

If a test is claimed in error, the Lab Account Owner can unassign a test. This feature is only available prior to the data due date for tests that have not been submitted.

Note: *Unassigning a test deletes <u>all</u> entered data!*
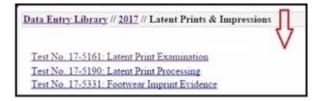
To Unassign a Test
Click on "Data Entry Library", under the "Data Entry" heading on the left hand side of the screen.

Select the current year from the options provided and select the discipline for the test you would like to unassign.

Select the specific test you would like to unassign.

Click the box under the column "Remove User and Delete all Data for Participant Code" for the user/participant code you would like to remove from the test. This feature is only available prior to the data due date for tests that have not yet been submitted.

Note: *Unassigning a test deletes <u>all</u> entered data!*

Click on the "Remove User" button.

You will see a note on the top of the page indicating the data for the selected test has been deleted. The participant code will no longer be associated with the user who was removed. The test can now be assigned to or claimed by another user.

How to Perform Master Group Dashboard Actions

This guide explains the actions that can be performed on the Master Group Dashboard. All active tests for users within your sub-groups are displayed on the Master Group Dashboard with information on the status of each. You can e-mail a PDF and view notifications for each individual test. You can also do bulk activities like e-mail PDFs, edit accreditation information, submit or retract tests, and forward or retract tests to/from a group. You can also view all archived tests for users within your sub-groups.

To open the Master Group Dashboard, Click on "My Groups", on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.

The Master Group Dashboard will open and a list of all the active tests for all members of the Master Group will be displayed. To show only a specific active test, use the drop down menu at the top to limit the list of active tests. Located below the list of active tests is the menu for bulk options, the Test Archive link and the listing of the Group ID & Group Managers.
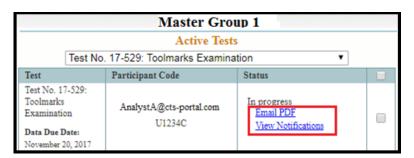
All active tests are listed on the top portion of the Dashboard. The first column lists the Test Number, Name, and Data Due Date. The second column lists the user name and participant code for the test, the third column lists the status of the test, and the fourth column is the selection box column used to perform bulk actions.

Status Options on the Master Group Dashboard:

▪ **In Progress** – The test is currently in the control of the original user. This may mean they have just claimed the test, are entering data, or have had the control passed back to them after a review. The "View Notifications" option will show what steps the test has gone through.
▪ **In Review** – Shows that the test is currently in the control of a sub-group, provides the sub-group name with a direct link that will take you to the sub-group's review dashboard, and will list if it is claimed or unclaimed by a reviewer within that sub-group.
▪ **Submitted** – Shows the date that the test was submitted to CTS.

Within the status column, there are two actions that can be performed on each specific test. If you click on "E-mail PDF", you can send a PDF copy of that specific test to any e-mail address. If you click on "View Notifications", a separate page will open that shows all the notifications for that specific test.

Bulk Actions

The Master Group Dashboard allows users with appropriate permission to perform actions on select tests individually or in bulk. The available options are listed within the action drop down list under the active tests.

For each action item, you can control which test the action is being performed on by adding a check to the box in the right column.
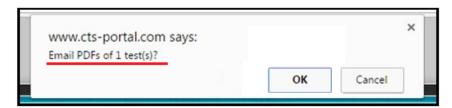

Bulk Actions available:

- **E-mail PDF** – The "E-mail PDF" bulk option allows user to send one or more tests to their e-mail. See detailed walkthrough below. **Note:** *Unlike the "E-mail PDF" option in the status column for each test, you cannot choose the e-mail address you are sending the bulk e-mails to. All PDFs will be sent to your User ID e-mail address.*
- **Edit Accreditation** – Allows user to review/edit/enter accreditation as described in this walkthrough: "How to Fill in Accreditation Information by a Master Group"
- **Submit to or Retract From CTS** – Allows user to submit or retract tests to/from CTS as described in this walkthrough: "How to Do a Bulk Submission or Retraction by a Master Group"
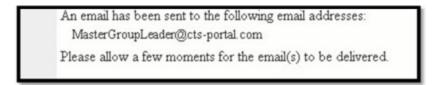
- **Forward to/ Retract From a Group** – Allows user to move a test in or out of a sub-group. These actions are helpful if a test has gotten "stuck" due to a user/reviewer being unavailable. See detailed walkthrough below.
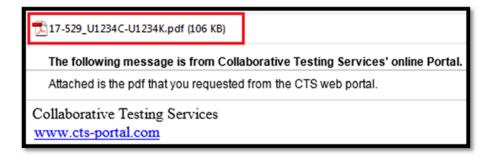
E-mail PDF

After selecting the E-mail PDF action, a pop up is triggered to confirm the number of tests and the action you wish to perform.

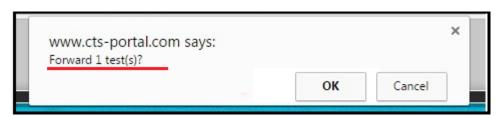After selecting "OK" a confirmation message will be displayed indicating that the test(s) have been e-mailed to you.

The E-mail will contain one PDF of all selected tests merged into one document.

Forward to a Group

The "Forward to a Group" option allows you to forward one or more tests to a group.

After selecting the "Forward to a Group" action a pop up is triggered to confirm the number of tests and the action you wish to perform.
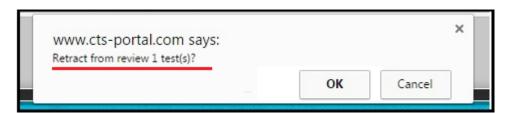
After selecting "OK", the Forward Test page will open, showing the selected test(s). Choose the correct sub-group from the drop down list, then click on the "Send" button

Forward Test

Test	Participant Code
Test No. 17-5550: Mobile Digital Evidence	U1001Y

Submit to group:

Sub Group 1 ▼ Send

Retract from Group Review

The "Retract from Group Review" option allows you to retract one or more tests from a group.

After selecting the "Retract from a Group Review" action, a pop up is triggered to confirm the number of tests and the action you wish to perform. Select "OK" to confirm the retraction.

www.cts-portal.com says:
Retract from review 1 test(s)?

OK   Cancel

The Master Group Dashboard will refresh once the action has completed and the retracted test(s) will show as "In progress". The test(s) will need to be resubmitted to CTS prior to the Data Due Date to be included in the final report.
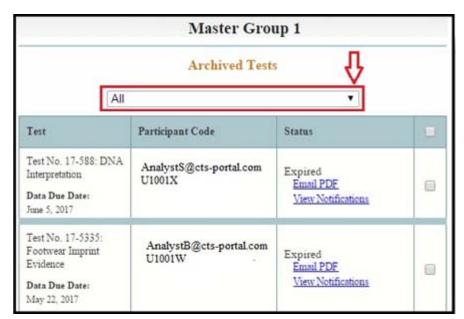
Test Archive

The Test Archive feature allows you to view any test that is expired. You can view the status and notification of each archived test, as well as send an individual or bulk PDF of one or more tests by e-mail.

To view the tests, click on "Test Archive" located below the drop down bulk action list.

The Archived Tests page will open, displaying all archived tests. You can also choose a specific archived test that you would like to view from the drop down list on the top of the page.

The "E-mail PDF" (both individual and bulk) and "View Notification" actions work the same way as described earlier in this help guide. See instructions above for each action.

How to Fill in Accreditation Information by a Master Group

This guide explains how to enter in Accreditation information for all active tests claimed by users within a Master Group and Sub-Groups. It also explains how the electronic signing of release to Accreditation feature works.

Click on "My Groups", on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.
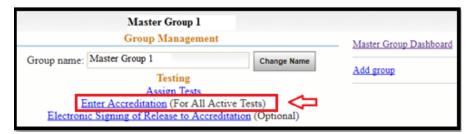

To Complete Accreditation in Bulk for All Active Tests

Click on "Manage Group" located on the right hand side of the Master Group Dashboard.

Click on "Enter Accreditation" listed under the Testing Section.

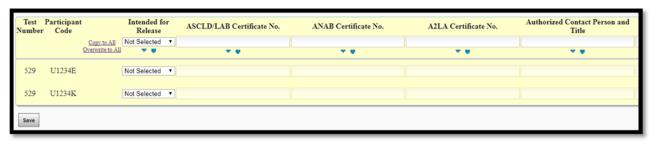This will take you to the accreditation completion page detailed below.

To Complete Accreditation for Select Tests/Users

Place a check in the right column for the tests/users you would like to edit accreditation for, select "Edit Accreditation" from the drop down list below the Active Tests, and click the Apply button.
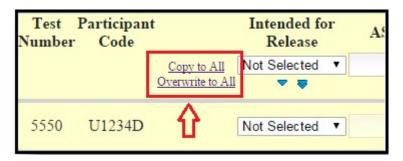

Accreditation Completion Page

A page will open that lists all assigned tests along with fields for the accreditation information. You can fill out information on the top row when you want to fill out several tests at once. If you are only filling out information for a particular test, fill out the fields in the row of that test.
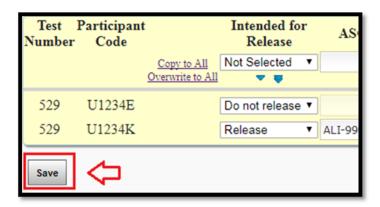
To complete multiple entries at the same time, fill in the information on the top row. Once all necessary information is filled in, click on either "Copy to All" or "Overwrite to All." "Copy to All" copies all the values in the top line to all empty rows, preserving any already entered values. "Overwrite to All" copies all the values in the top line to all rows, overwriting any already entered values.

If you only want a certain column of information copied to additional rows, click on either the blue single arrow or the blue double arrow below the field you wish to copy. This is useful for a column that was incorrect and you just want to copy that particular column to the tests below. The single arrow copies the value down to all empty fields; it does not overwrite any pre-existing values. The double arrow copies the values to all fields, overwriting all pre-existing values.

Once all information is finished, click on the "Save" button.

If you complete the Accreditation in Bulk through the Group Management page, you will receive the following notification that the Accreditation has been updated.

The completion of accreditation through the Master Group Dashboard for select tests/users will not show a confirmation message, but you can view the notifications for that test/user and see the completion of accreditation listed.

Electronic Signing of Release to Accreditation (optional)

This feature is used to have e-mail confirmation that the Master Group Manager filled out the Accreditation page. It adds an extra step to filling out the Accreditation page.

Click on "My Groups" on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.
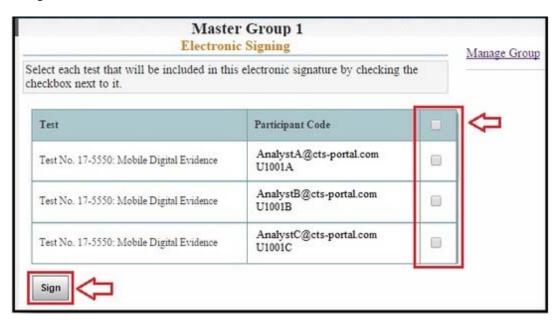

Click on "Manage Group" located on the right hand side of the Master Group Dashboard.

Click on "Electronic Signing of Release to Accreditation" listed under the Testing Section.

The Electronic Signing page will open. Click on the box right next to each test you would like to perform the electronic signature activity. Once all necessary tests are chosen, click on the "Sign" button.
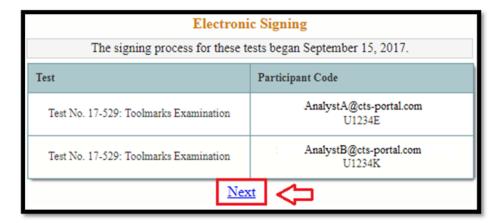

A confirmation message will be displayed.

Once you receive the e-mail from the Portal, follow the directions provided to complete the electronic signing process.

The link will take you to the Electronic Signing page. Click on "Next."

Electronic Signing

The signing process for these tests began September 15, 2017.

Test	Participant Code
Test No. 17-529: Toolmarks Examination	AnalystA@cts-portal.com U1234E
Test No. 17-529: Toolmarks Examination	AnalystB@cts-portal.com U1234K

Next

The Enter Accreditation page will open for you to enter, edit, or review as described above. Once completed, click on the "Save" button.

A confirmation message will be shown on the screen.

Electronic Signing

2 test(s) signed at Sept. 15, 2017, 8:29 a.m.

And a new notification is logged to this test to indicate it was electronically signed.

Showing notifications for: U1234E

09/15/2017 08:29AM	Your test Test No. 17-529: Toolmarks Examination, for participant code U1234E, has been signed and accreditation information may have been updated.

How to Do a Bulk Submission or Retraction by a Master Group

This guide explains how to complete a bulk submission to CTS. The accreditation information can also be filled out during the bulk submission. You can submit just one, a few, or all of the active tests. This guide also explains how to complete test retraction by the Master Group.
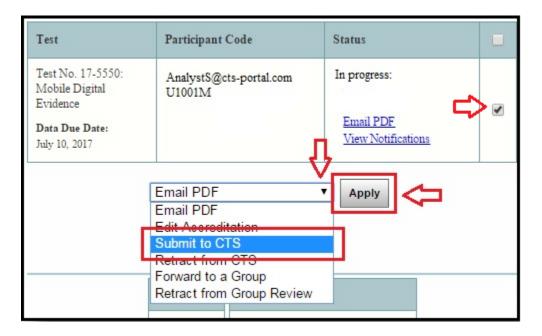
How to Submit Tests in Bulk

Click on "My Groups" on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.
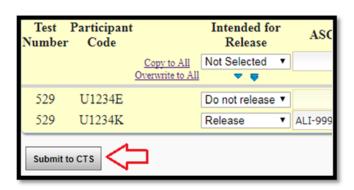

A list of all the active tests for all members of the Master Group will be displayed. To show only a specific active test, use the drop down menu at the top.
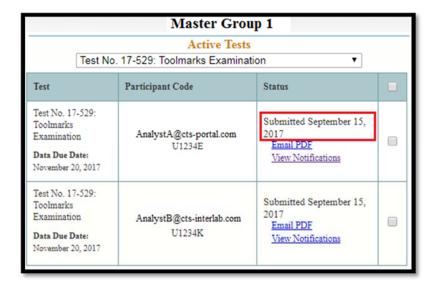
Click on the box in the right column for each test that you want to submit to CTS. Choose "Submit to CTS" from the drop down list below the active tests. Click on the "Apply" button. **Note:** *The Master Group has the power to submit tests directly to CTS no matter their review status.*
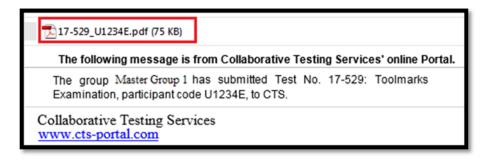

The Enter Accreditation page will open. Enter, edit, or review as described in the walkthrough: "How to Fill in Accreditation Information by a Master Group". The only difference is that instead of the "Save" button, this version of the accreditation page will have a "Submit to CTS" button. Once the accreditation information has been completed, click "Submit to CTS".
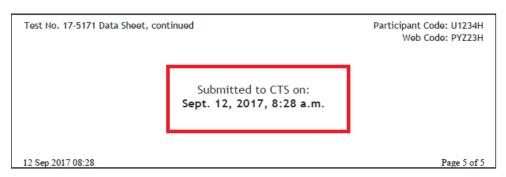
The Master Group Dashboard will open back up. The test(s) that you submitted will show up as "Submitted" under the status column.

The Original User will receive an e-mailed notification that their test has been submitted to CTS by the Master Group along with a PDF copy of the submission.
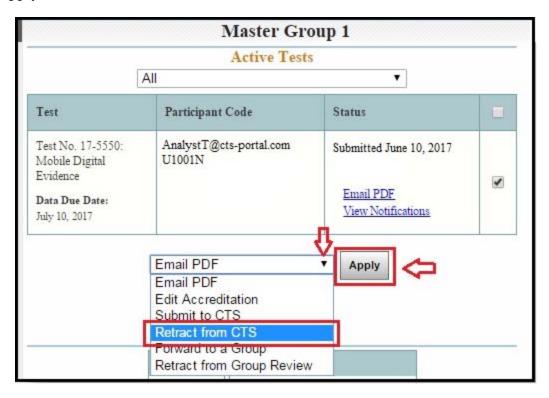

The PDF will include a submission time stamp on the last page.

Bulk Retraction

To retract a test or tests that have been submitted to CTS, start at the Master Group Dashboard.
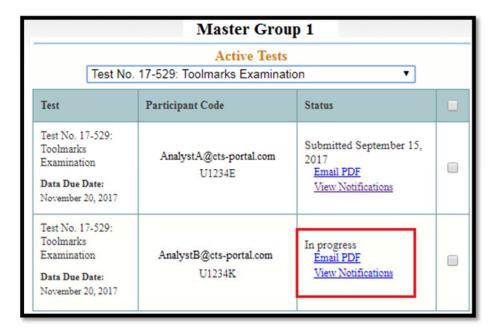
Click on the box in the right column for each submitted test that you want to retract from CTS. Choose "Retract from CTS" from the drop down list below the active tests. Click on the "Apply" button.
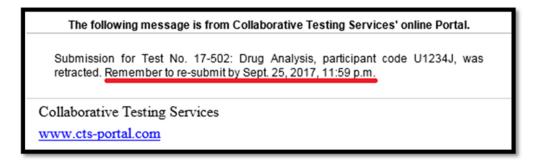

A pop up confirmation message will appear. Click "OK" to retract the test(s).

The tests that you retracted will be returned to the control of the user and show up as "In progress" under the status column.

The Original User will receive an e-mailed notification that their test has been retracted.

Note: *Data can be retracted for corrections at any time prior to the Data Due Date. However, a final submission must be made prior to the Data Due Date in order for CTS to receive the data.*

How to Start a Group for Forensic Programs

Note: *These instructions should only be used if not using the Master Group Feature. If you are using the Master Group Feature, follow the instructions listed here: "*How to Create & Manage a Master Group & Sub-Group(s)*". Need help deciding? See this section of the Help guides for more information on the features of a Master Group ("*How to Choose a Lab Setup*").*

A Group is started by a Group Manager. The Group Manager will then add users and set permissions for those users. A group allows users to submit tests to the group for review or final submission. The tests can then be reviewed by a manager or another designated member of the group. Permissions can be set to allow only certain users to be able to submit tests to CTS.

Sign onto the CTS Portal and click on "My Groups" on the left side of the page. Then, click on "Start a Forensics Group".

Type in a user-defined group name. In our example, we used "Tech Review 123". Click on the "Create Group" button.

A confirmation page will open and you can move directly to adding members through the link below the group name. This group will now be visible on your "My Groups" page.

How to Add Users to a Group or Join a Group

There are two different ways to add users to the group. The first option is for the Group Manager to add new users. The second option is for an individual user to join the group themselves.

Note: *If you are using a Forensics Master Group with Forensic Groups as sub-groups for organizational or review purposes, you will want to create that structure prior to adding users to the sub-groups following this guide. The guide for setting up a Master Group is located here: "How to Create & Manage a Master Group & Sub-Group(s)".*

Option One: Group Manager Adds a User(s)

Click on "My Groups", then click on "Review Dashboard" under the Group that you want to add users to.

Then click on "Manage Group" on the right hand side of the screen of the Group Page.

On the Group Management page, click on "Add/Edit Membership" under the Users Section.

The Add/Edit Membership page will open.

In the Add Users section, type user e-mail addresses that you would like to invite into the box. You can add as many users as necessary. Enter each e-mail address on a separate line in the box.
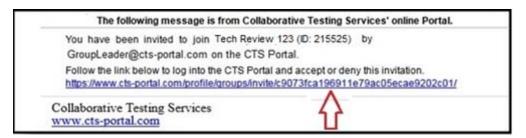
Once all users have been added, click on the "Invite User(s)" button.
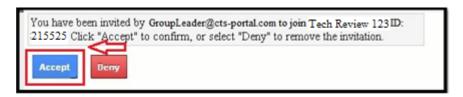

A message will be displayed indicating that the specified users have been invited to the group or a message indicating that the following users are not registered and have been sent an invitation.

Each user will receive an e-mail. If the user is registered, they will receive an e-mail like the one shown below. The user should click on the link that is indicated by the arrow.
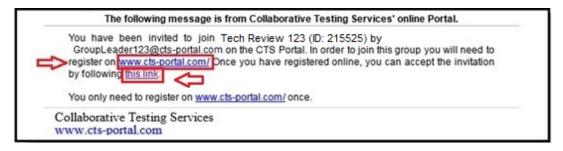
The link will take the user to the CTS Portal where the user will see an option to accept or deny the invitation. To accept the invitation and join the group, click on the "Accept" button.

If a user is not registered, the user will receive an e-mail stating they have been invited to join a group and providing a link to register on the Portal.

The user must first click on the Portal hyperlink to register on the site. Once registration is complete, the second link provided in the invitation e-mail can be used to access the accept or deny screen as shown above. The user would then click on the "Accept" button to be added to the group.
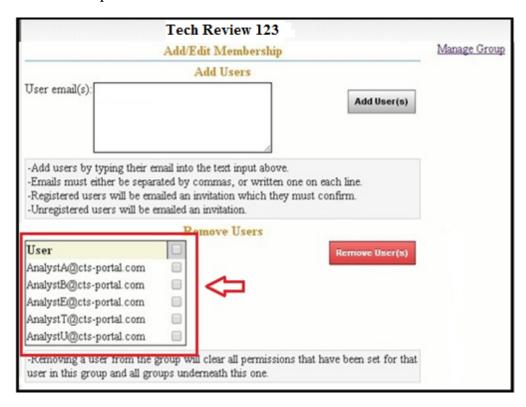

While waiting for a user to join a group, their information will be shown under the "Invites Awaiting Response" section of the Group Management page.
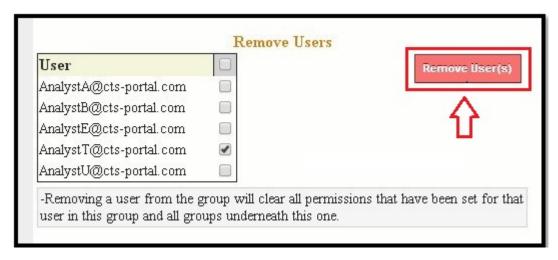
The invite can be resent or canceled by checking the appropriate box and clicking the "Apply" button.

Once the users have accepted the invitation, they will be shown on the bottom of the Add/Edit Membership window.

Note: *If you would like to delete a user, click on the box next to the user. This will add a checkmark next to the e-mail address. Click on the "Remove User(s)" button. The user will be deleted.*

Master Group Note: *Removing a user from a Master Group will delete the user from any sub-group associated with the Master Group. However, removing a user from a Group will not remove them from the Master Group or any other groups. To delete a user from all the Groups, delete them one time from the Master Group.*
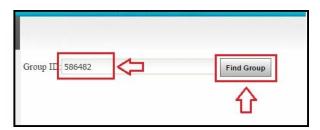
Option Two: User Joins Group Themselves

A Group ID number is located to the right of the group name on the "My Groups" page. This is needed by a user to join the group. Give this Group ID number to any user(s) who should join the group.

Each user will need to click on "My Groups", under the "Data Entry" heading on the left hand side, then click on "Join a group".

The Group ID page will open requesting the Group ID number. Each user will type in the Group ID number, then click on the "Find Group" button.

The Group will be displayed, along with a "Join" button. Each user must click on the "Join" button to join the group.
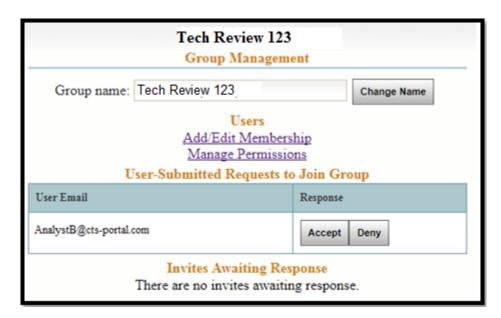
The user will see a confirmation message displayed, and the steps to request to join the group are now complete.

A request for membership has been sent to the group.

The Group Manager now needs to accept each user by opening the Group Management page. Click on "My Groups", then click on "Review Dashboard" under the group. Click on "Manage Group".

The "User-Submitted Requests to Join Group" section will list all users who are awaiting permission to join the group. Click on the "Accept" button to allow the user(s) to join the group.

Tech Review 123
Group Management

Group name: Tech Review 123   Change Name

Users
Add/Edit Membership
Manage Permissions
User-Submitted Requests to Join Group

User Email	Response
AnalystB@cts-portal.com	Accept Deny

Invites Awaiting Response
There are no invites awaiting response.

How to Set Permissions for Forensics Group Members

This guide explains how to set the permissions for each user of a forensics group.

Note: *These instructions are for the Forensics Groups typically used for reviews, submission, or organizational reasons, the instructions on permissions for the Forensics Master Group are found here:* "How to Set Permissions for Forensics Master Group Members".

Click on "My Groups", then click on the "Review Dashboard" under the forensics group you would like to set permissions for.

Click on "Manage Group" on the right hand side of the screen of the Group Page.

On the Group Management page, click on "Manage Permissions" under the Users section.

The Permission Management page will open, listing all users of the group. Users with manager permissions are under the "Group Managers" section. The remainder of the users are listed under the "Group Users" section.

All boxes with a check mark indicate that the user has permission for that activity.

Click on a box to either add a check mark or remove a check mark. Once all permissions are set, click on one of the "Apply" buttons.

Tech Review 123
Permission Management

Manage

Apply ⇦

User	Submit Tests to Group for Review	Review Tests	Review Own Test	Edit Accreditation	Submit Tests to CTS	Retract Own Tests from CTS	Invite Members to Group	Manage	Receive Emails Regarding This Group
Group Managers									
AdditionalManager@cts-portal.com	✔	☐	☐	☐	☐	☐	☐	✔	☐
GM@cts-portal.com	✔	✔	✔	✔	✔	✔	✔	✔	☐
Group Users									
Check/Uncheck All	✔	☐	☐	☐	☐	☐	☐	☐	☐
AnalystA@cts-portal.com	✔	☐	☐	☐	☐	☐	☐	☐	
AnalystB@cts-portal.com	✔	☐	☐	☐	☐	☐	☐	☐	
AnalystC@cts-portal.com	✔	☐	☐	☐	☐	☐	☐	☐	
TechReviewer@cts-portal.com	✔	✔	☐	☐	☐	☐	☐	☐	☐

Apply ⇦

Actions available by setting permissions:

- **Submit Tests to Group for Review** - allows user to forward their tests to the Review Dashboard.
- **Review Tests** - allows user to claim a test within the Review Dashboard and perform the selected review actions.
- **Review Own Test** – By default, a user cannot review their own test. This permission allows them to do so.
- **Edit Accreditation** - allows user to edit the accreditation section of their own test(s) and allows a user with the "Review Tests" permission to edit the accreditation section of tests they are reviewing.
- **Submit Tests to CTS** - allows user to submit their own test(s) to CTS and allows a user with the "Review Tests" permission to submit tests that they are reviewing to CTS.

- **Retract Own Tests from CTS** - allows user to retract their own test(s) from CTS. A reviewer cannot retract tests from CTS for another user.
- **Invite Members to Group** - allows user to add other users to the group and send invitation e-mails to them.
- **Manage** - allows user to set permissions.
- **Receive E-mails Regarding This Group** - allows user to receive all e-mails sent out for this group. The option for this permission is only available to users with the "Review Tests" or "Manage" permissions.

Note: *The user who started a group is automatically set as Group Manager. This user has all the permissions. Users within a Forensics Group receive only the first permission "Submit Tests to Group for Review" by default. The remaining permissions must be specifically turned on by the Group Manager.*

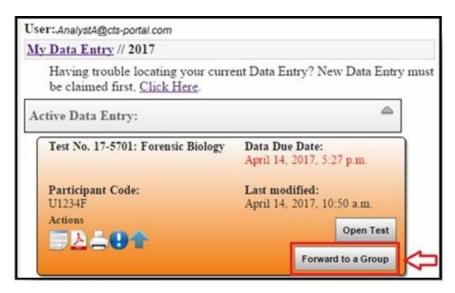# How to Hand in a Test for Review

This guide walks you through forwarding a test to a group for review or submission. To use this feature you must belong to a group.

There are two different links that you can use to forward your test to a group. Both will take you to the same group selection page.
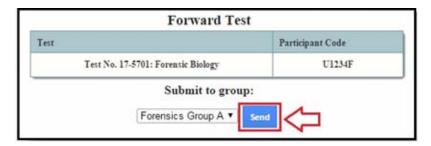
If your test is open, click "Forward to a Group" located on the upper right hand corner of your test.

You can also forward your test from the "My Data Entry" page. Click on the "Forward to a Group" button located on your active test.
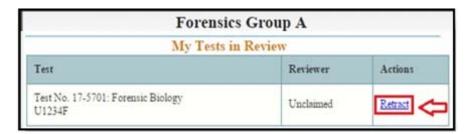

Choose the group you would like to submit your test to by clicking on the arrow button next to the group name. This will bring up a drop down list of all your available groups. Select the correct group, then click on the "Send" button.
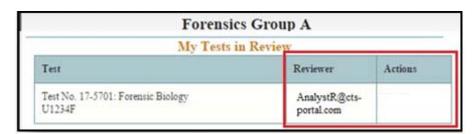
A message will be displayed confirming that the test has been forwarded to the group for review. Click on "Review Dashboard" to view your forwarded test within the Group's Review Dashboard.
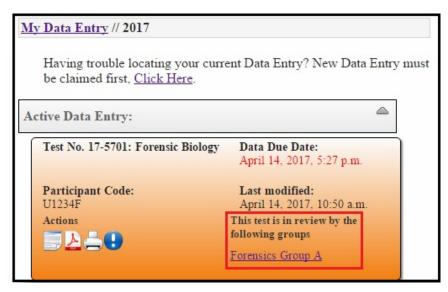

Until your test is claimed by a reviewer, you can retract the test from the group. To do this, click on "Retract."

Once your test has been claimed by the reviewer, it can no longer be retracted. The "Retract" action will no longer be shown. The name of the user who claimed your test to review will be listed.
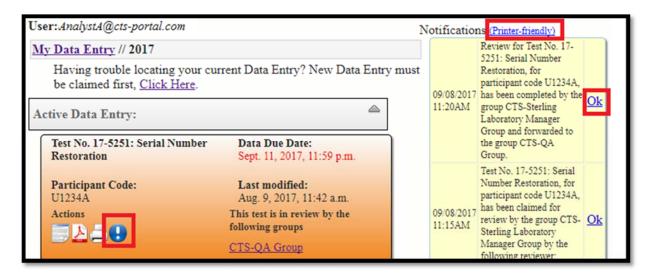

Under your "Active Data Entry" you will see your test is in review with the applicable group. The Group Name link will take you directly to the Review Dashboard.
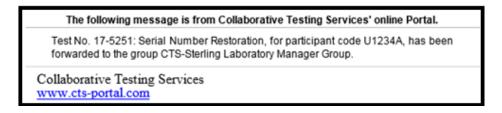
Notifications/E-mails

You will receive various notifications and e-mails when submitting a test to a group. Notifications are displayed on the right side of the Portal when users are logged in, under the "Notifications" heading. The "Printer-friendly" link will print all of your notifications, the "Ok" link next to each notification will dismiss that notification from the side bar list.

You can also view all notifications associated with a particular test by clicking on the "View Notifications" option listed under the Actions section of your test, represented by the "!" icon.

E-mail notifications are sent directly to the user's registered e-mail address.

Notifications are triggered for most actions performed on your test within a review group.

- **User forwards a test to a group**
- **Test claimed by a reviewer in any group**
- **Reviewer forwards test to another group**
- **Reviewer has completed review, marked it complete or incomplete, and returned it to original User.** *Note 1: Reviewers have the ability to provide an optional comment with this notification. Note 2: The notification that a review has been completed does not imply it has been submitted to CTS, that is a separate function and notification.*
- **Submission of test to CTS**

How to Review a Test and Perform Post Review Actions

This guide walks you through how to review a test that has been submitted for review. It also explains the post review actions you can perform with the test, such as submitting it to another group or CTS.

Find Test for Review

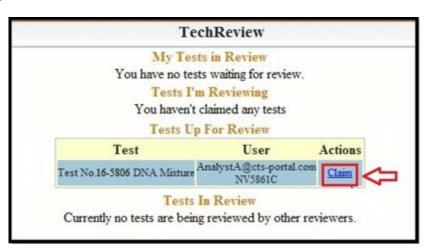Click on "My Groups", then click on the "Review Dashboard" under the forensics group you would like to access.

Claim Tests

Under the Tests Up for Review header, there will be a list of all tests to be reviewed.
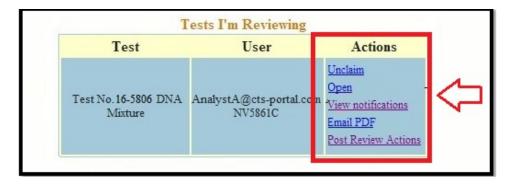
If you do not see the sections "Tests I'm Reviewing" and "Tests Up for Review," you have not been given the permission to claim tests for review. Contact your Group Manager to have this corrected.

Click on "Claim" next to the test you are reviewing. This will move the test up to the "Tests I'm Reviewing" section.

Reviewer Actions

The Actions section will now show all actions available to a Reviewer.

Overview of Reviewer Actions

- **Unclaim** – releases a test that was incorrectly claimed so that the appropriate reviewer may claim it.
- **Open** - allows reviewer to open a Read Only version of the test to perform onscreen review.
- **View Notifications** – allows reviewer to see all notifications specific to this test.
- **E-mail PDF** - allows reviewer to request a PDF of the test results for offline review.
- **Post Review Actions** – opens a new section of the review panel that contains all options a reviewer has after the review has been completed.

Open

A read only version of the test will open. Click on each tab to review the separate pages. **Note:** *No changes can be made to the test. You are only reviewing.*

Click "back" once you are finished reviewing.

View Notifications

A new page will open that lists all notifications related to the test. This includes when it was forwarded to the review groups, and who claimed it for review.

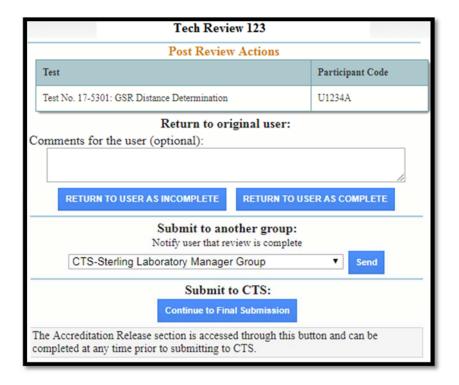|	Showing notifications for: U1234A
09/14/2017 08:48AM	Test No. 17-5301: GSR Distance Determination, for participant code U1234A, has been claimed for review by the group CTS-Sterling Laboratory Manager Group by the following reviewer: QualityManager
09/14/2017 08:47AM	Test No. 17-5301: GSR Distance Determination, for participant code U1234A, has been forwarded to the group CTS-Sterling Laboratory Manager Group.
09/11/2017 06:45 PM	Test No. 17-5301: GSR Distance Determination for participant code U1234A, has been marked incomplete by the group Tech Review 123 Group and returned to your control. Please note: no message was included in this review response.
09/11/2017 05:01PM	Test No. 17-5301: GSR Distance Determination, for participant code U1234A, has been claimed for review by the group Tech Review 123 Group by the following reviewer: TechReviewer
09/11/2017 05:01PM	Test No. 17-5301: GSR Distance Determination, for participant code U1234A, has been forwarded to the group Tech Review 123

E-mail PDF

A new page will open that allows you to send a PDF version of the selected test to one or more e-mail addresses for offline review or documentation needs.

Note: *This is NOT a submission of your data to CTS.*

This feature allows you to send a PDF version of the selected Data Sheet or Cycle to one or more email addresses. This is intended for offline review or documentation needs. It is NOT a submission of your data to CTS.

Please specify the email(s) where the PDF should be sent.
Enter each email on a separate line.

TechReviewer@cts-portal.com

Submit Request

Post Review Actions

You will be taken to the following page that has several actions that can be performed. A description of each of the actions is listed below.

Return to Original User:

When returning the test to the original user, an optional comment can be entered in the provided box. Once any necessary comment has been typed into the text box, click on the "Return to User as Incomplete" or "Return to User as Complete" buttons to return the test to the original user with the selected notation of incomplete or complete.

The original user will receive an e-mailed notification of this action and the test will be removed from your "Tests I'm Reviewing" section of the Review Dashboard.
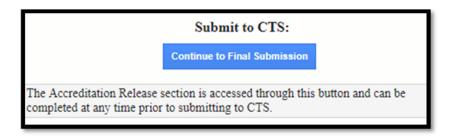
Submit to another group:

If you would like to submit the test to another group for review or final test submission, choose the correct group from the drop down list. Then click on the "Send" button. You can also submit the test to the same group for another reviewer to claim.

The original user will receive an e-mailed notification of this action and the test will be removed from your "Tests I'm Reviewing" section of the Review Dashboard.

Submit to CTS and/or Fill out or View Accreditation Information:

If the test is complete and you would like to submit the test to CTS, click on the "Continue to Final Submission" button. Also click this button if you would like to view or fill out the accreditation information only.
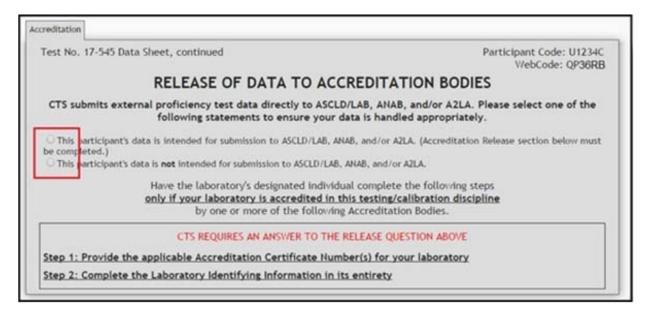

The Accreditation Release page of the test will open.

If you see "This view is READ-ONLY" in the upper left hand corner, it means you do not have permission to fill out the accreditation information. If the information has not been filled out and you do not have permission to fill out the accreditation information, click the "Save & Close" button and inform the necessary person.

If the information has already been filled out you can proceed to the CTS submission instructions below.

If the information has not been filled out and you do have permission to fill out the accreditation information, click on the circle next to the appropriate response.
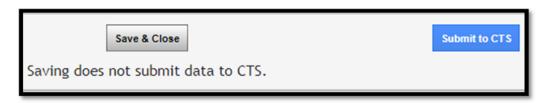

If you click on the circle next to the first response, the bottom section will appear. Fill in the information into the bottom section.
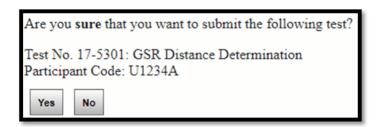
Once you have filled out the accreditation information, you can either click on "Save and Close" to close this window and perform another post review action, like forwarding to another group, or return to the user. You can also submit the test to CTS by clicking on the "Submit to CTS" button to send the test to CTS.
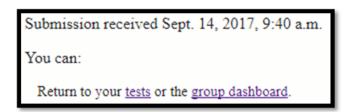
Note: *If the Submit to CTS button does not appear, you do not have permission to submit the test to CTS. Contact the appropriate Group Manager to have this resolved.*

A confirmation screen will appear. Click on the "Yes" button to confirm that you would like to send the test to CTS.
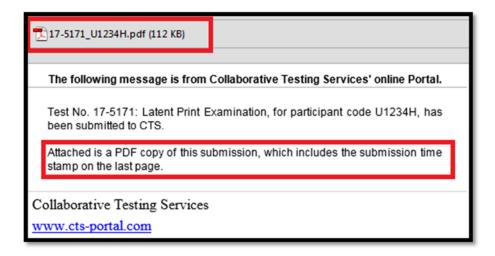

A message confirming that the test has been submitted will appear. You can return to your My Data Entry section of the portal through the "tests" link or return to the Group Dashboard through the "group dashboard" link.

The Original User will receive two e-mailed notifications that their test has been submitted to CTS. The first states that the Group submitted the test to CTS.

The second is a submission confirmation e-mail along with a PDF copy of the submission.

17-5171_U1234H.pdf (112 KB)

The following message is from Collaborative Testing Services' online Portal.

Test No. 17-5171: Latent Print Examination, for participant code U1234H, has been submitted to CTS.

Attached is a PDF copy of this submission, which includes the submission time stamp on the last page.

Collaborative Testing Services
www.cts-portal.com

The PDF will include a submission time stamp on the last page.

Test No. 17-5171 Data Sheet, continued   Participant Code: U1234H
                                                          Web Code: PYZ23H

Submitted to CTS on:
Sept. 12, 2017, 8:28 a.m.

12 Sep 2017 08:28   Page 5 of 5