

# CTS Portal User Guides

CTS Portal - Forensics

2017

# CTS Portal User Guides

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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

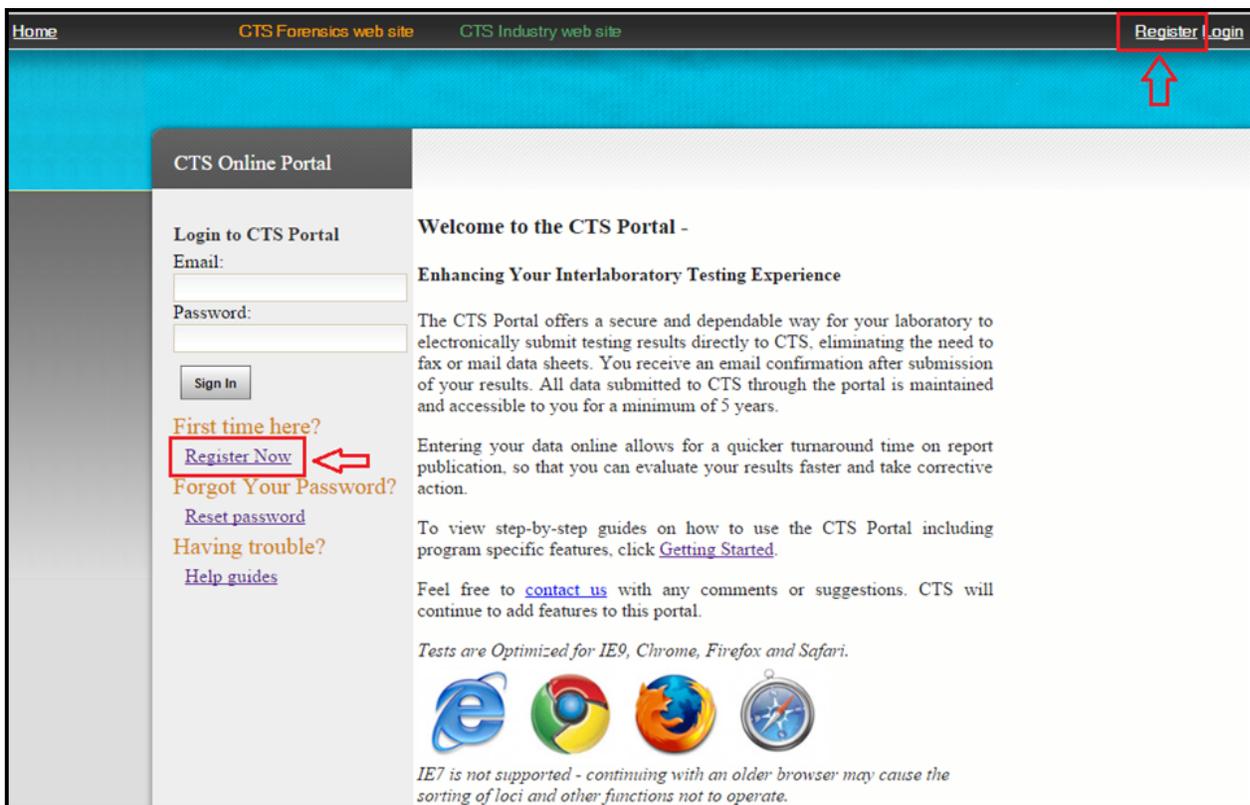
**Note:** *The first time you sign onto the CTS Portal, you may need to complete registration.*

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.

**Register for CTS**  
Password is case sensitive.

Email address: \*

Password: \*

Password confirmation: \*

Please select a department: \*

### 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.

**CTS Online Portal**

**Login to CTS Portal**

Email:

Password:

**Welcome to the CTS Portal - Enhancing Your Interlaboratory T...**

The CTS Portal offers a secure and electronically submit testing results d...  
fax or mail data sheets. You receive...  
of your results. All data submitted to...  
and accessible to you for a minimum...

Entering your data online allows fo...  
publication, so that you can evaluate...  
action.

To view step-by-step guides on h...  
program specific features, click [Getti...](#)

Feel free to [contact us](#) with any...

**First time here?**  
[Register Now](#)

**Forgot Your Password?**  
[Reset password](#)

**Having trouble?**  
[Help guides](#)

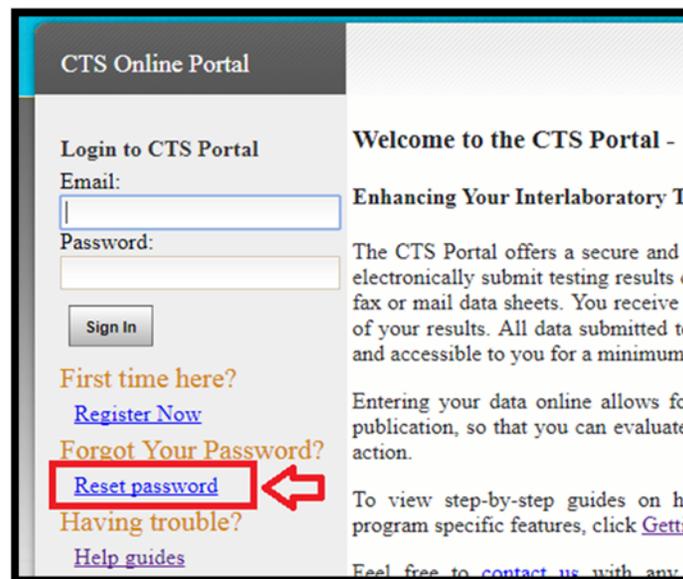
# How to Reset or Change Your Password

This guide walks you through resetting your password.

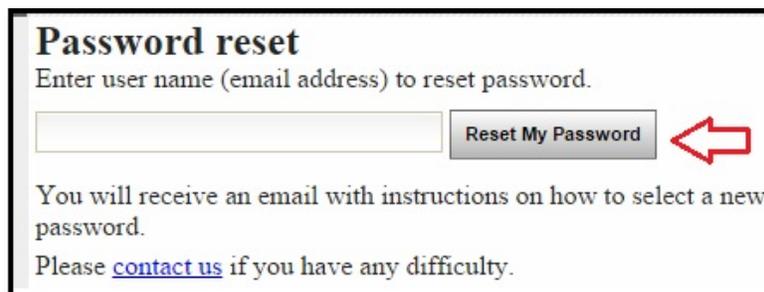
There are two different ways to reset your password, depending on whether you forgot your password and need to reset it to sign in to the Portal, or if you are already signed in and would like to change your password.

## Reset Forgotten Password:

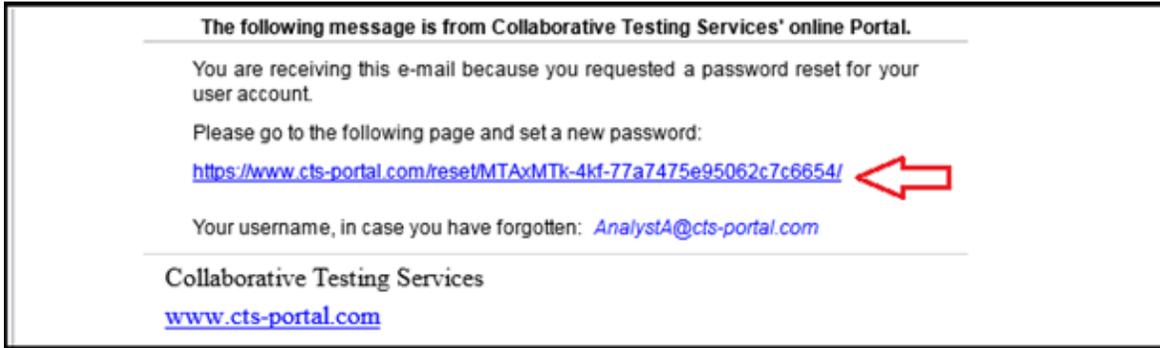
Click on “Reset password”, below the "Forgot Your Password?" heading on the left side, below the log-in fields.



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



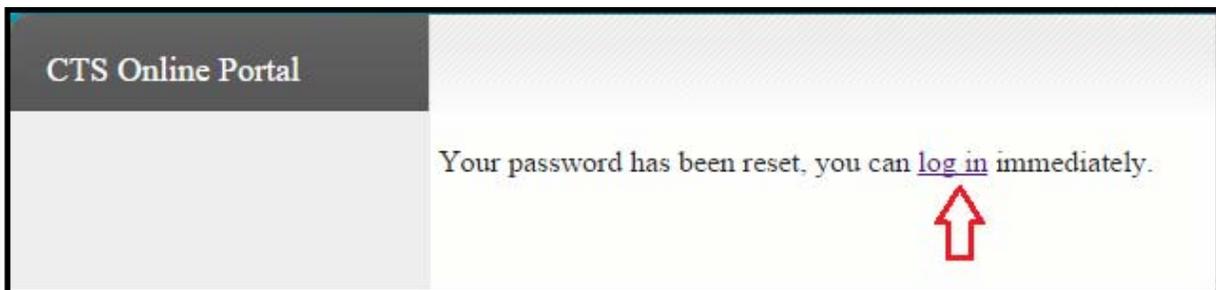
An e-mail will be sent to you. Open the e-mail and click on the link provided to go to the page indicated.



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.



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

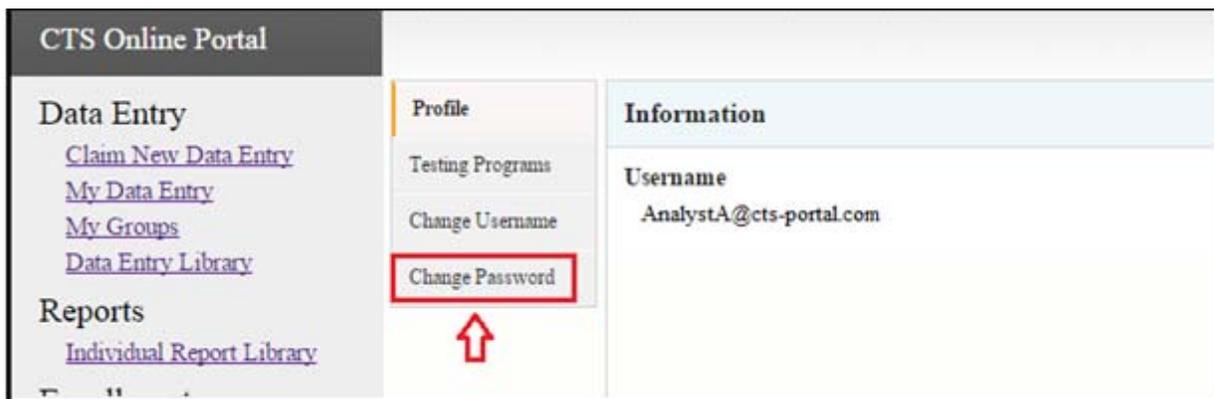


## Change Your Password through My Accounts

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.



**Change Password**

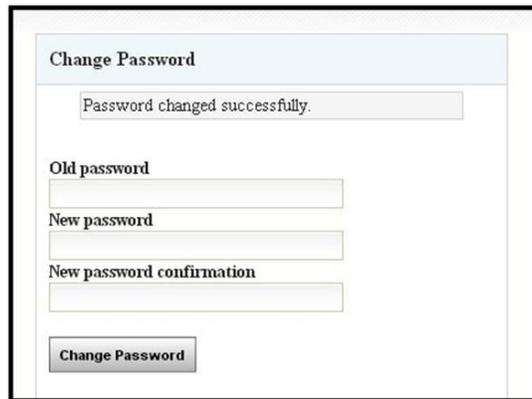
Old password  
.....

New password  
.....

New password confirmation  
.....

**Change Password**

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.



**Change Password**

Password changed successfully.

Old password

New password

New password confirmation

**Change Password**



**Change Password**

Old password

New password

New password confirmation

**The two password fields didn't match**

**Change Password**



**Change Password**

Old password

**Your old password was entered incorrectly. Please enter it again.**

New password

New password confirmation

**Change Password**

# How to Choose a Lab Setup

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This guide explains the different Forensic Group setups available on the CTS Portal. You can do a simple set up with no groups 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.

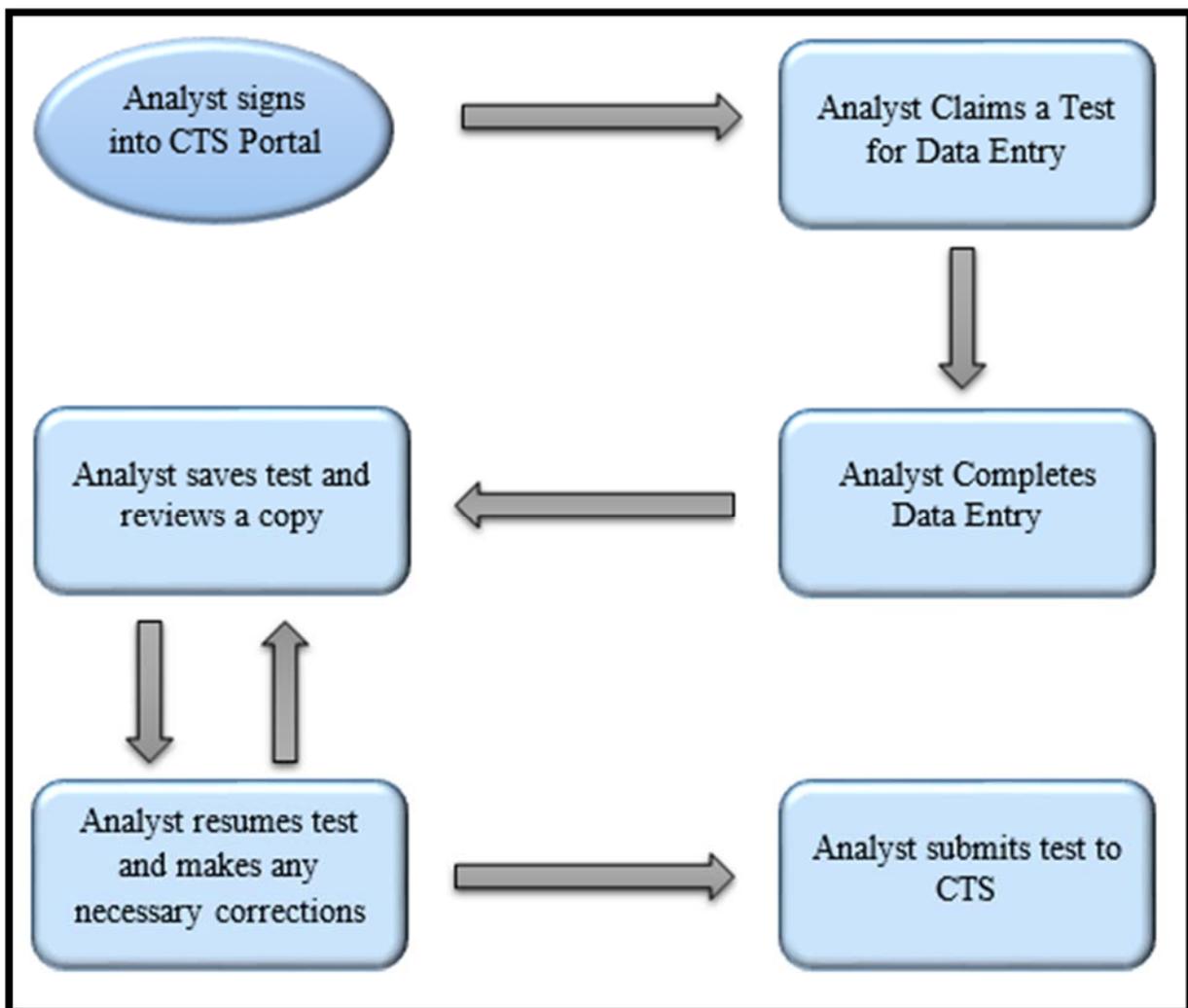
Similar to the Groups only option, more than one review/submission group can be used depending on your needs. Set up one Master Group and add as many individual groups as necessary.

## 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.

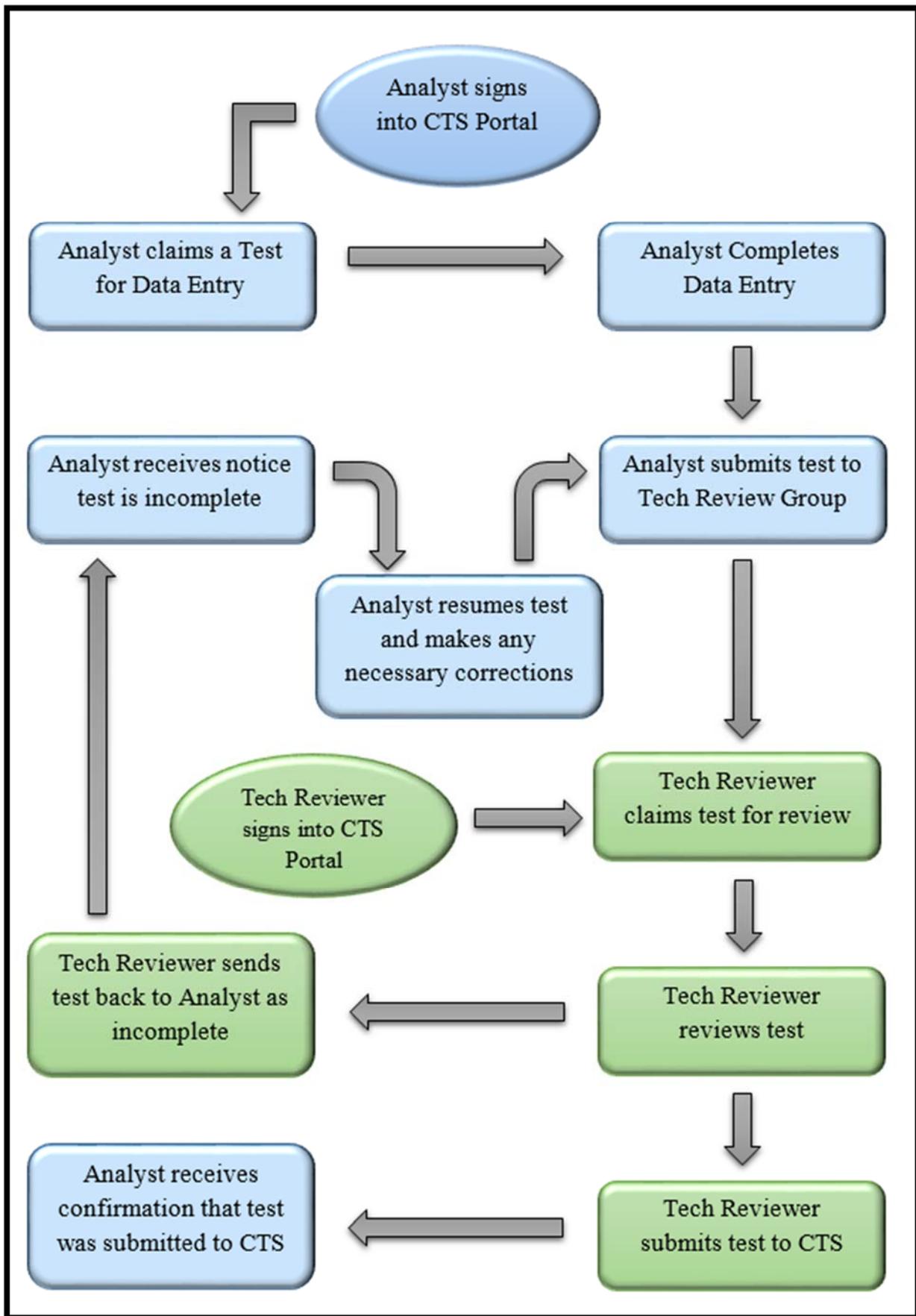


## Review or Submission Groups only, no Master Group

**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.



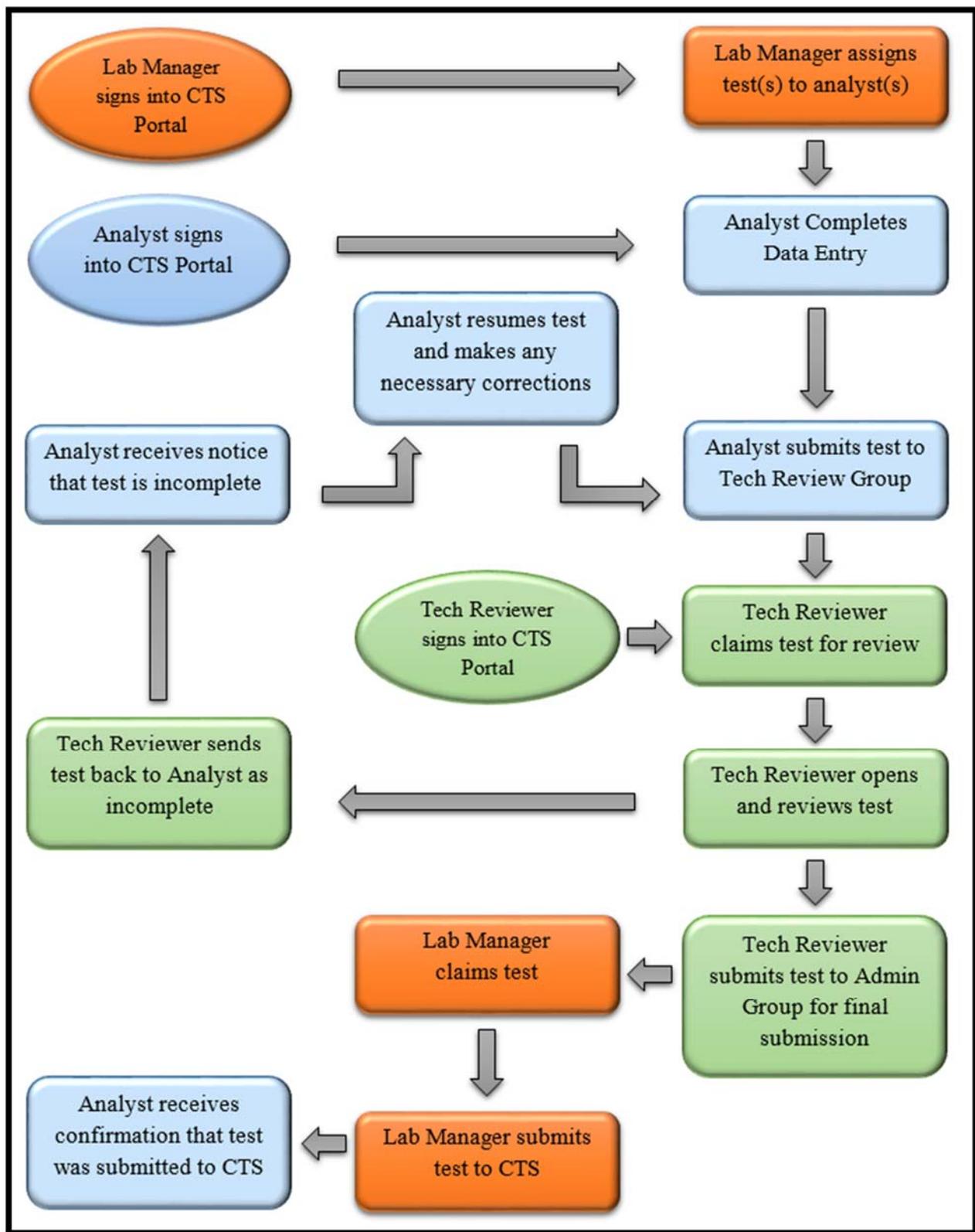
## Master Group and Sub-Groups (Review or Submission Groups)

**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.

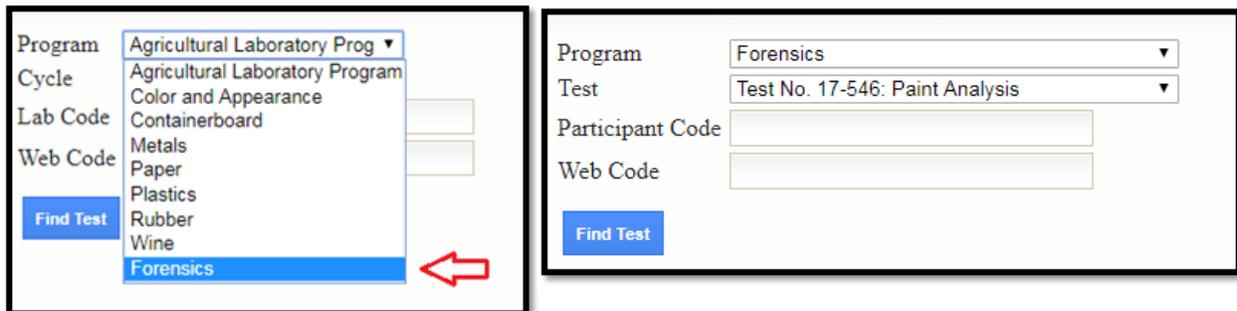
**Note:** For instructions on assigning a test to another user, or for assigning in bulk, please see the [“How to Assign a Test to User\(s\) through a Master Group”](#) guide.

## 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.

Two screenshots of a web form. The left screenshot shows a form with fields for "Program", "Cycle", "Lab Code", and "Web Code". The "Program" dropdown menu is open, showing a list of options: "Agricultural Laboratory Program", "Color and Appearance", "Containerboard", "Metals", "Paper", "Plastics", "Rubber", "Wine", and "Forensics". A red arrow points to the "Forensics" option. Below the list is a "Find Test" button. The right screenshot shows the same form with "Program" set to "Forensics" and "Test" set to "Test No. 17-546: Paint Analysis". There are also empty input fields for "Participant Code" and "Web Code", and a "Find Test" button.

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: [Print] [PDF] [Share] [Alert] [Refresh]  
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.

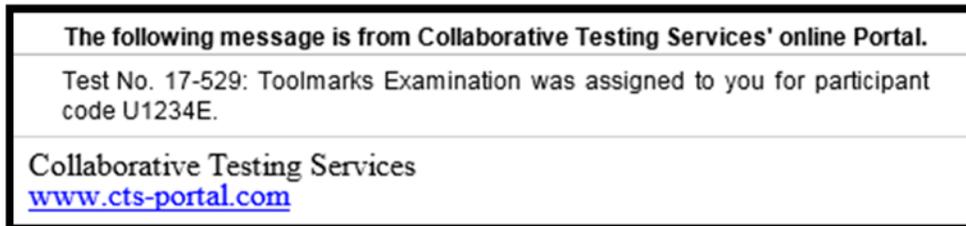
- You have entered the correct Participant Code and Web Code for your test.
- The data due date for the test has not passed.
- You are the only one assigned to this Participant Code and Web Code.

**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

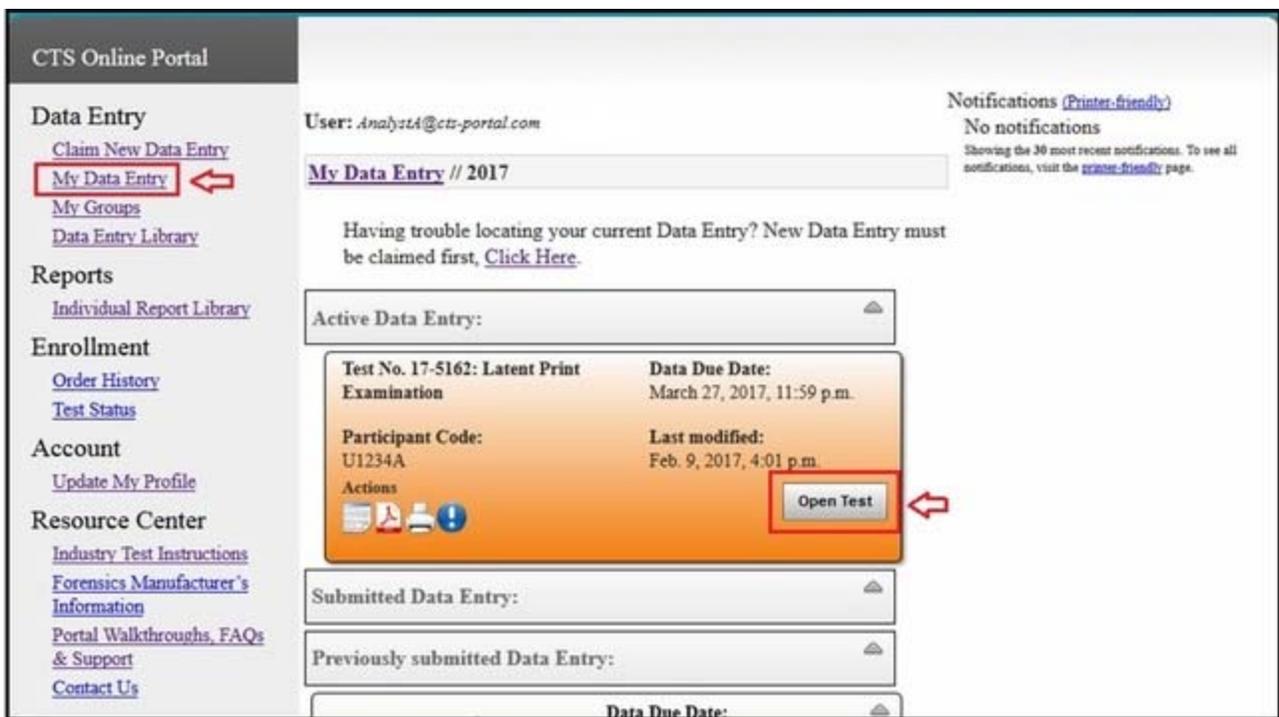
If your laboratory has a Master Group with Sub-Groups setup, they have the ability to assign tests directly to users. If you have been assigned a test through this feature, the test will be automatically added to your profile.

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



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

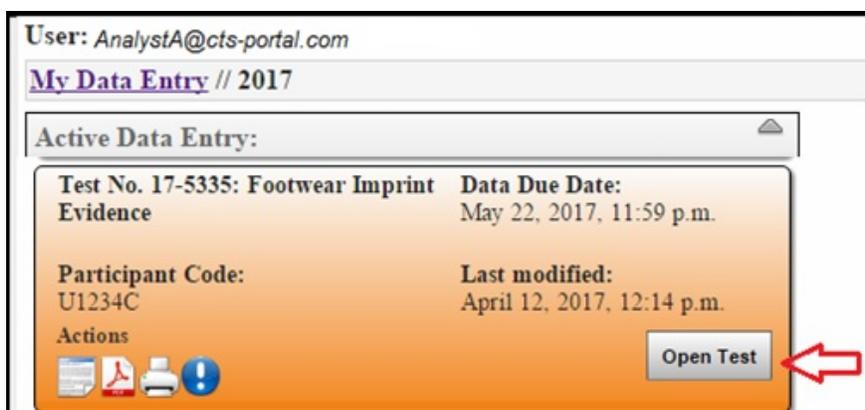
This guide walks you through accessing test materials for Digital Download tests.

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.



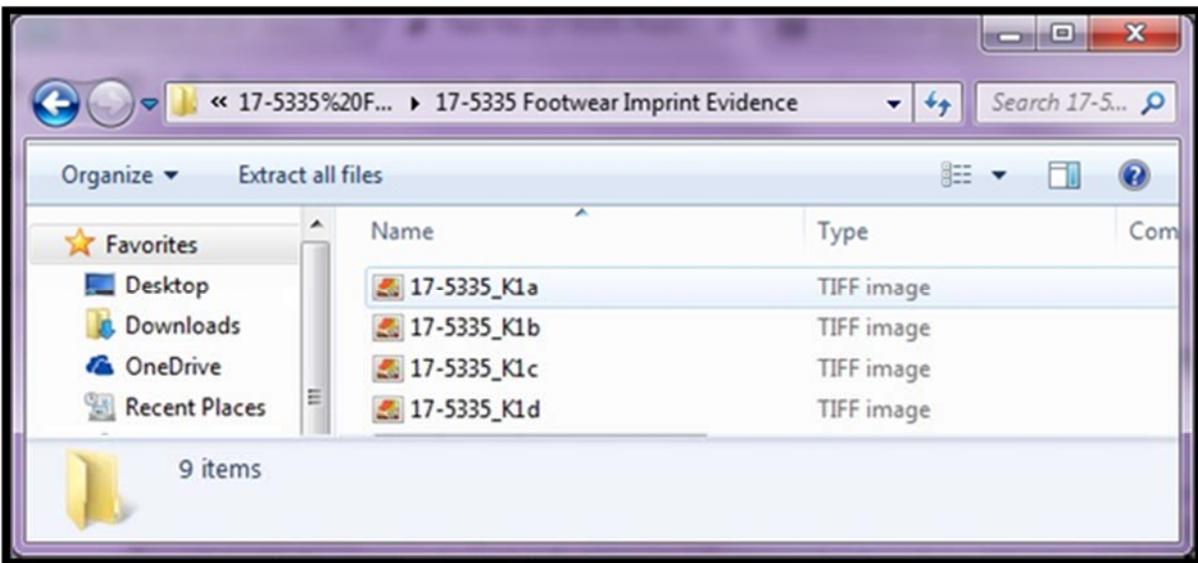
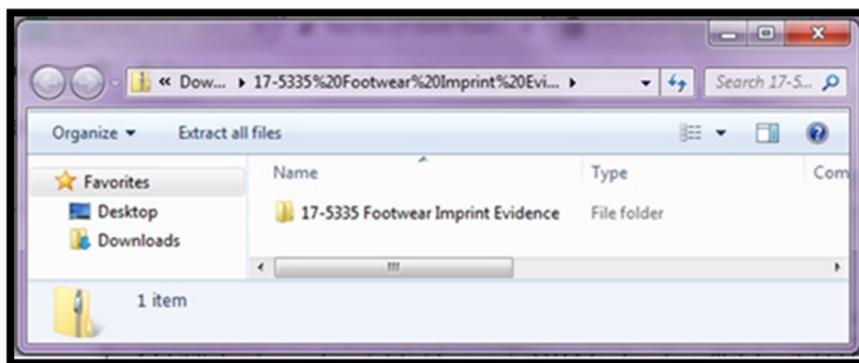
The response form for the test will open. Locate and click on the blue link toward the bottom of the scenario. Depending on the testing discipline, the text around the link may vary from that seen in the image below.



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.

Save Save & Close

Saving does not submit data to CTS.

Scenario Screening Item 1 Item 2 Item 3 Item 4 Additional DNA mtDNA Interpretation

Collaborative Testing Services ~ Forensic Testing Program

**Test No. 17-5702: Forensic Biology**

DATA MUST BE SUBMITTED BY **May 8, 2017, 11:59 p.m.** TO BE INCLUDED IN THE REPORT

Participant Code: U1234E WebCode: E9KEVH

The Accreditation Release section can be accessed by using the "Continue to Final Submission" button above. This information can be entered at any time prior to submitting to CTS.

**Scenario:**  
Police are investigating the physical assault of a woman outside of a convenience store. The suspect was a man seen earlier that day arguing with the woman. The suspect was apprehended at his home shortly after the incident. The investigators are submitting stains from the suspect's shirt and victim's shirt for analysis along with blood samples of the victim and the suspect.

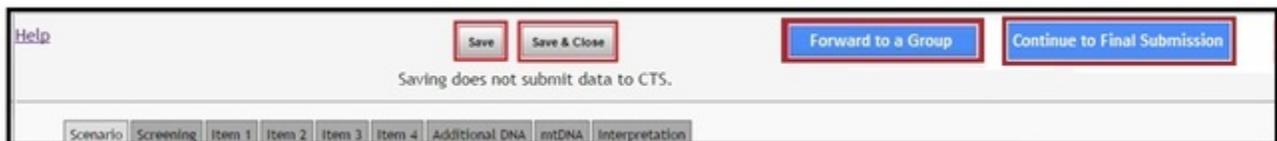
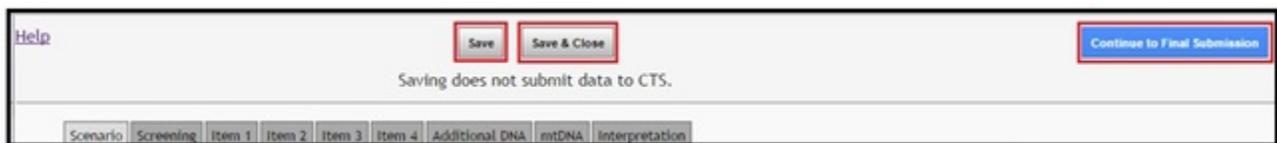
**Items Submitted (Sample Pack B2):**  
Item 1: Known blood from the male victim.  
Item 2: Known blood from the female suspect.  
Item 3: Questioned stain from the passenger seat fabric. (dark gray material)  
Item 4: Questioned stain from the suspect's shirt. (blue/white striped material)

Page 1 of 9  
[Next](#)

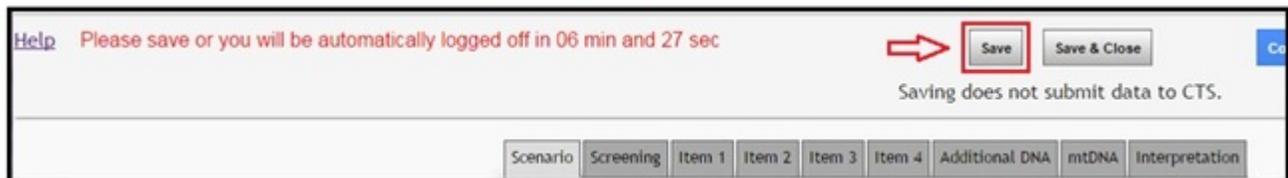
The following action buttons are found on the top of the page:

- **"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.

Please indicate the Test(s) Performed on the corresponding line for each type of screening.

Item 3:

	Positive	Negative	Inconclusive	Not Tested	Test(s) Performed
Blood	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Semen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Saliva	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Other: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Click in circle to select

Fill in blank boxes

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

Click "Add Row" to show another row of boxes for entry.

Did you perform a differential extraction of Item 3? Yes  No

Did you perform a differential extraction of Item 4? Yes  No

Add Row

Locus	Item 1	Item 2	Item 3	Item 3e	Item 3sp	Item 4	

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

Scenario Screening STR-Knowns STR-Questioned YSTR Additional DNA mtDNA Interpretation

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.

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Next

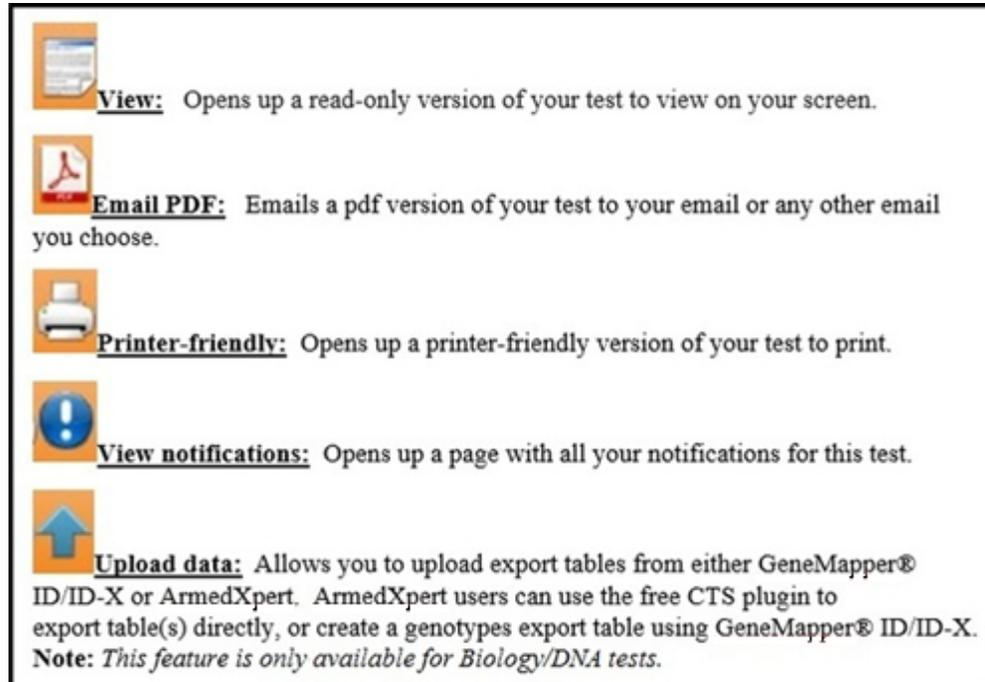
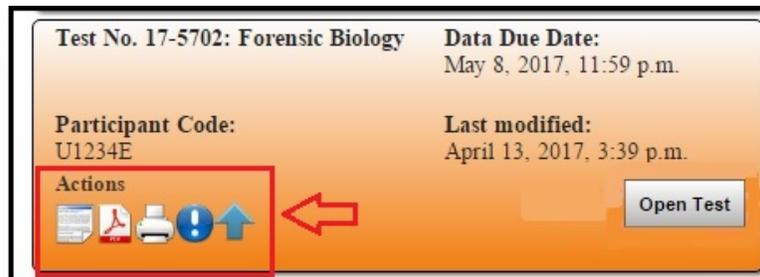
Continue throughout the test until completed.

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".



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



## 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.

**Part II (continued): DNA Analysis - Additional DNA**

- Use this section to report results for loci not currently listed in other sections of the data sheet.
- Report alleles in numerical order, separated by a comma.
- If you wish to indicate minor or weaker alleles, enclose each one within brackets while maintaining numerical order.
- Click "Add Row" to show another row of boxes for entry.

Did you perform a differential extraction of Item 3? Yes  No

Did you perform a differential extraction of Item 4? Yes  No

Add Row

Locus	Item 1	Item 2	Item 3	Item 3e	Item 3sp	Item 4	Item 4e	Item 4sp

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.

Did you perform a differential extraction of Item 3? Yes  No

Did you perform a differential extraction of Item 4? Yes  No

Add Row

Locus	Item 1	Item 2	Item 3	Item 4e	Item 4sp

Did you perform a differential extraction of Item 3? Yes  No

Did you perform a differential extraction of Item 4? Yes  No

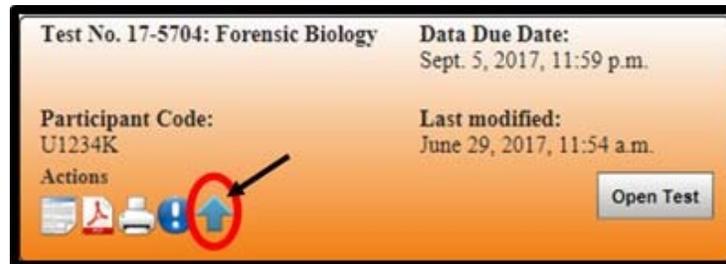
Add Row

Locus	Item 1	Item 2	Item 3e	Item 3sp	Item 4e	Item 4sp

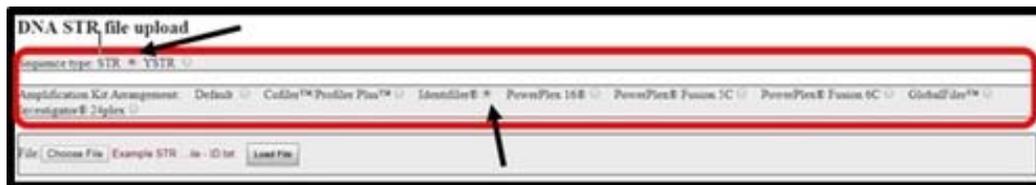
# How to Upload DNA Data into Your Test

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.*

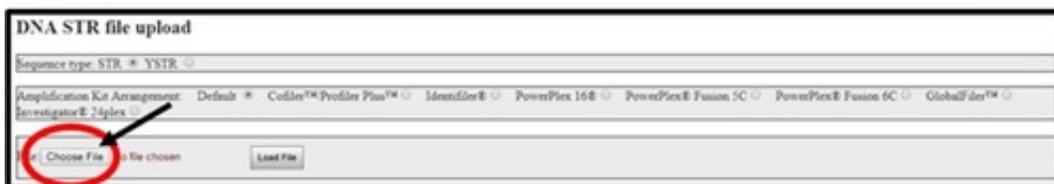
Once the test is claimed, it will appear in the “My Data Entry” section. Click on the blue arrow icon under “Actions” and the "Upload data" page will open.



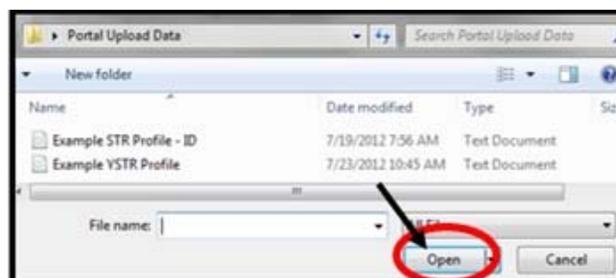
First, choose the sequence type and the amplification kit arrangement option. The sequence type will control the amplification kit options that are displayed under the Amplification Kit Arrangement section. The amplification kit chosen will control the loci order.



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.

Name	0994 Item 1 Blood	0995 Item 1 Blood	Select	0999 Item 4 Crime	0995 1 Item 3 sus	0995 2 Item 3 sus	Select	Select
Items	1	2	3	4	3a	3ap	4a	4ap
Sample Name	0994 Item 1 Blood-VICT27	0995 Item 1 Blood-SUSPECT_2		0999 Item 4 Crime scene 1945a	0995 1 Item 3 sus of Victim 1a1	0995 2 Item 3 sus of Victim 1a2		
Sample File	042_MF_31308_288 9-11-25_Fsa	041_MF_31308_288 9-11-25_Fsa		042_MF_31308_288 9-11-25_Fsa	041_MF_31308_288 9-11-25_Fsa	041_MF_31308_288 9-11-25_Fsa		
CTS Locus	File Locus	Alleles	Alleles	Alleles	Alleles	Alleles		
D18S11	D18S11	24,30	30	30	24,30,36	30		
D7S820	D7S820	9,10	7,12	7,12	7,8,10,12	7,12		
CSF 1PO	CSF 1PO	1	10,12	10,12	7,10,12	10,12		
D3S1358	D3S1358	21,17	15	18	15,17	15		
TH01	TH01	6	6,8,3	6,8,3	6,8,3	6,8,3		
D13S317	D13S317	12,13	11,13	11,13	11,13,15	11,13		
D16S439	D16S439	13	9,11	9,11	9,11,13	9,11		
D2S1338	D2S1338	14,19	19	18	14,19	18		
D19S433	D19S433	13,14	13	15	13,14	13		
AWA	AWA	15,16	17,18	17,18	15,16,17,18	17,18		
TPOR	TPOR	8,12	11	11	8,12	11		
D18S61	D18S61	14,18	14,17	14,17	14,17,18	14,17		
Amelogenon	AMEL	X	X,Y	X,Y	X,Y	X,Y		
DSS818	DSS818	11,12	11	11	11,12	11		
FGA	FGA	22	22,24	23,24	22,23,24	23,24		
Fenxa E								
Fenxa D								

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.

CTS Locus	File Locus	Alleles
D8S1179	D8S1179	14
D21S11	D21S11	29,36
D7S820	D7S820	9,10
CSF1PO	CSF1PO	7
D8S1179	D3S1358	15,17
CSF1PO	D13S321	12,13
D3S1358	D16S539	13
Penta D		

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.

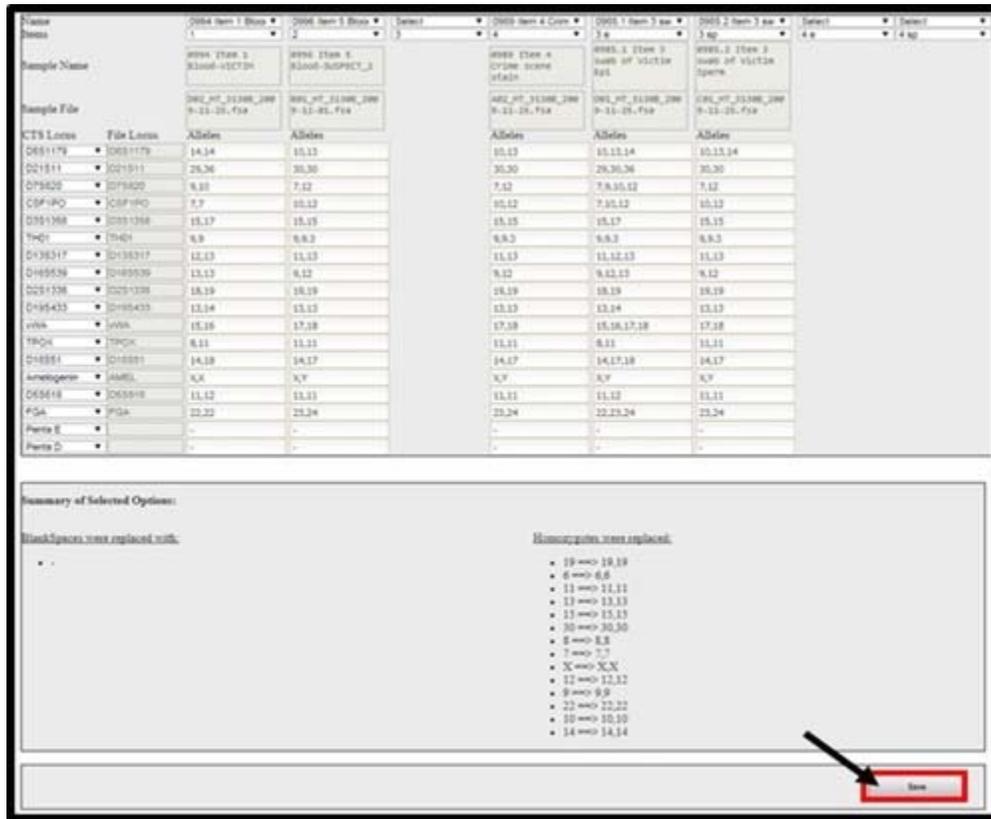
Character(s)	Substitute With	Display as Homozygotes	Character(s)	Substitute With
BlankSpace		<input checked="" type="checkbox"/> Select All	7	7
		<input checked="" type="checkbox"/>	13	13,13
		<input checked="" type="checkbox"/>	11	11,11
		<input checked="" type="checkbox"/>	30	30,30
		<input checked="" type="checkbox"/>	12	12,12
		<input checked="" type="checkbox"/>	8	8,8
		<input checked="" type="checkbox"/>	X	X,X
		<input checked="" type="checkbox"/>	22	22,22
		<input checked="" type="checkbox"/>	15	15,15
		<input checked="" type="checkbox"/>	9	9,9
		<input checked="" type="checkbox"/>	19	19,19
		<input checked="" type="checkbox"/>	8	8,8
		<input checked="" type="checkbox"/>	14	14,14
		<input checked="" type="checkbox"/>	10	10,10

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

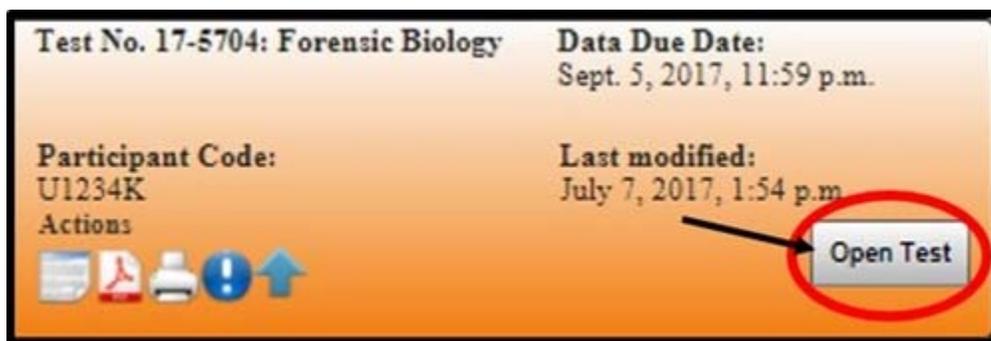
Next

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.

The screenshot shows the CTS Portal interface. On the left is a sidebar with navigation links: 'Data Entry' (with sub-links 'Claim New Data Entry', 'My Data Entry', 'My Groups', 'Data Entry Library'), 'Reports' (with 'Individual Report Library'), 'Enrollment' (with 'Order History', 'Test Status'), 'Account' (with 'Update My Profile'), and 'Resource Center' (with 'Industry Test Instructions'). The main content area shows the user 'AnalystA@cts-portal.com' and the section 'My Data Entry // 2017'. A message asks if the user is having trouble locating their current Data Entry. Below this is a section titled 'Active Data Entry:' containing details for 'Test No. 17-545: Paint Analysis', including the 'Data Due Date: May 30, 2017, 11:59 p.m.' and 'Participant Code: U1234C'. At the bottom of this section, there are icons for document, PDF, printer, and help, and an 'Open Test' button highlighted with a red box and a red arrow.

## Continue to Final Submission

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

The screenshot shows the bottom of the CTS Portal page. It features a footer area with 'Save' and 'Save & Close' buttons on the left, and a 'Continue to Final Submission' button on the right, which is highlighted with a red box and a red arrow. Below the buttons, there is a message: 'g does not submit data to CTS.'

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

Accreditation

Test No. 17-545 Data Sheet, continued Participant Code: U1234C  
WebCode: QP36RB

### RELEASE OF DATA TO ACCREDITATION BODIES

CTS submits external proficiency test data directly to ASCLD/LAB, ANAB, and/or A2LA. Please select one of the following statements to ensure your data is handled appropriately.

This participant's data is intended for submission to ASCLD/LAB, ANAB, and/or A2LA. (Accreditation Release section below must be completed.)

This participant's data is **not** intended for submission to ASCLD/LAB, ANAB, and/or A2LA.

Have the laboratory's designated individual complete the following steps **only if your laboratory is accredited in this testing/calibration discipline** by one or more of the following Accreditation Bodies.

**CTS REQUIRES AN ANSWER TO THE RELEASE QUESTION ABOVE**

**Step 1: Provide the applicable Accreditation Certificate Number(s) for your laboratory**

**Step 2: Complete the Laboratory Identifying Information in its entirety**

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

### RELEASE OF DATA TO ACCREDITATION BODIES

CTS submits external proficiency test data directly to ASCLD/LAB, ANAB, and/or A2LA. Please select one of the following statements to ensure your data is handled appropriately.

This participant's data is intended for submission to ASCLD/LAB, ANAB, and/or A2LA. (Accreditation Release section below must be completed.)

This participant's data is **not** intended for submission to ASCLD/LAB, ANAB, and/or A2LA.

Have the laboratory's designated individual complete the following steps **only if your laboratory is accredited in this testing/calibration discipline** by one or more of the following Accreditation Bodies.

**Step 1: Provide the applicable Accreditation Certificate Number(s) for your laboratory** ←

ASCLD/LAB Certificate No.

ANAB Certificate No.

A2LA Certificate No.

**Step 2: Complete the Laboratory Identifying Information in its entirety** ←

Authorized Contact Person and Title

Laboratory Name

Location (City/State)

**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.

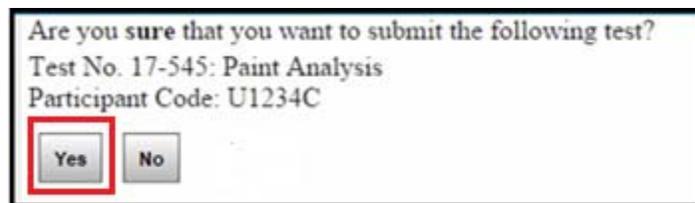


If the information has already been filled out, you can proceed to the next step. If the information is not filled out and you do not have permission to fill out the accreditation information, click on the "Save & Close" button and inform the correct person at your lab.

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:**

<b>Test No. 17-5171: Latent Print Examination</b>	<b>Data Due Date:</b> Oct. 16, 2017, 11:59 p.m.
<b>Participant Code:</b> U1234H	<b>Last modified:</b> 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](http://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

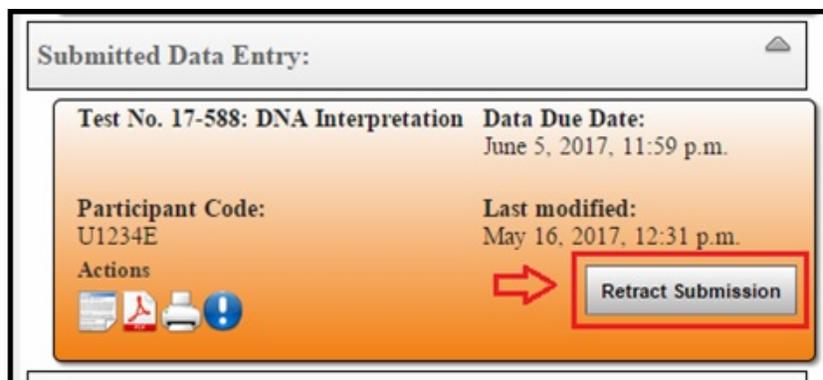
# How to Retract a Submitted Test

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](#)"

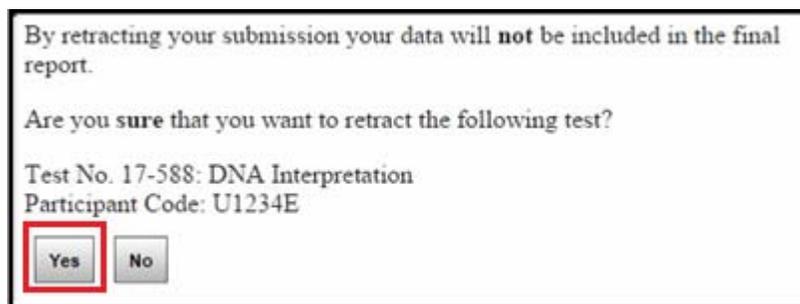
## Retract Submission

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

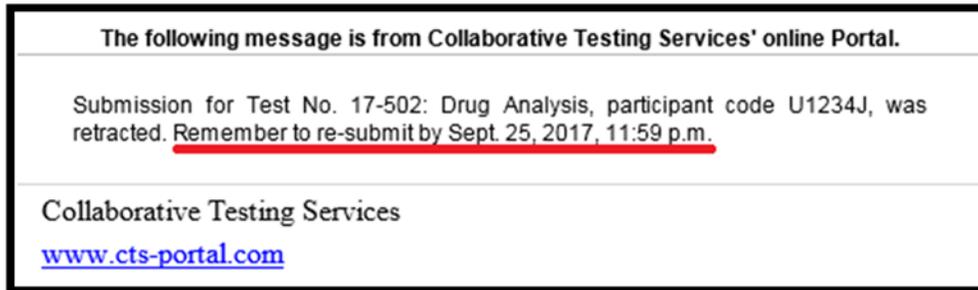
**Note:** *If the retract submission button is greyed out and unavailable, it means you belong to a group and you do not have permission to Retract your test. The Group Manager can give you permission if it is necessary to retract your submission. Once permission has been granted, the "Retract Submission"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



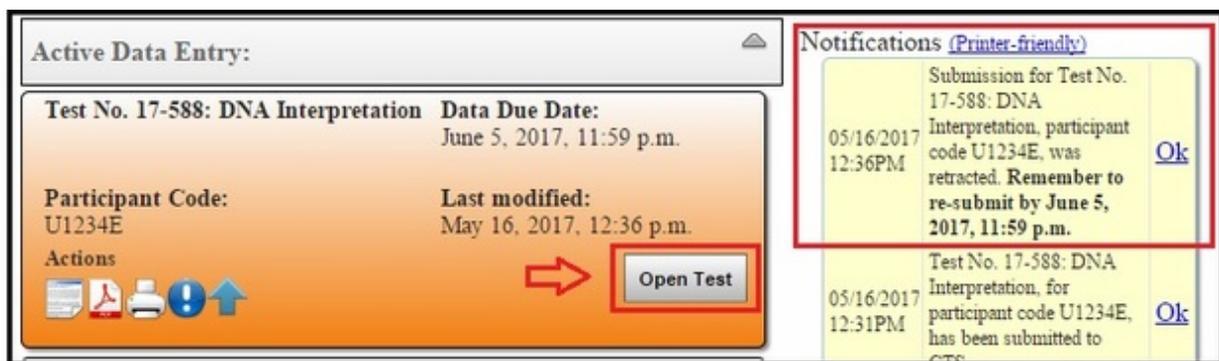
You will be asked to confirm you would like to retract the selected test.



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.



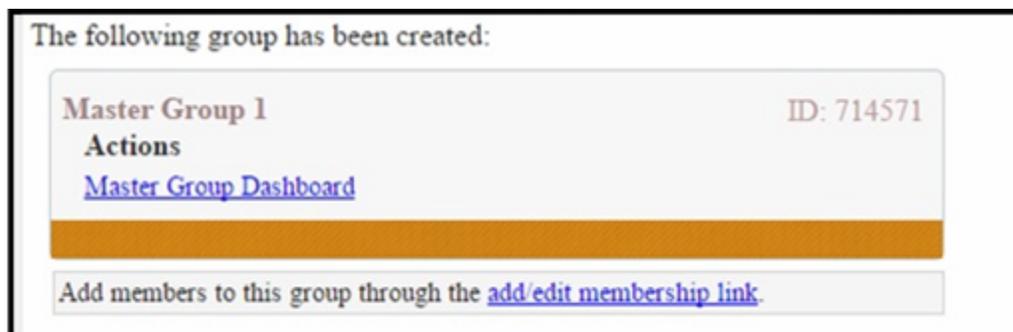
## Name Your Master Group

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.

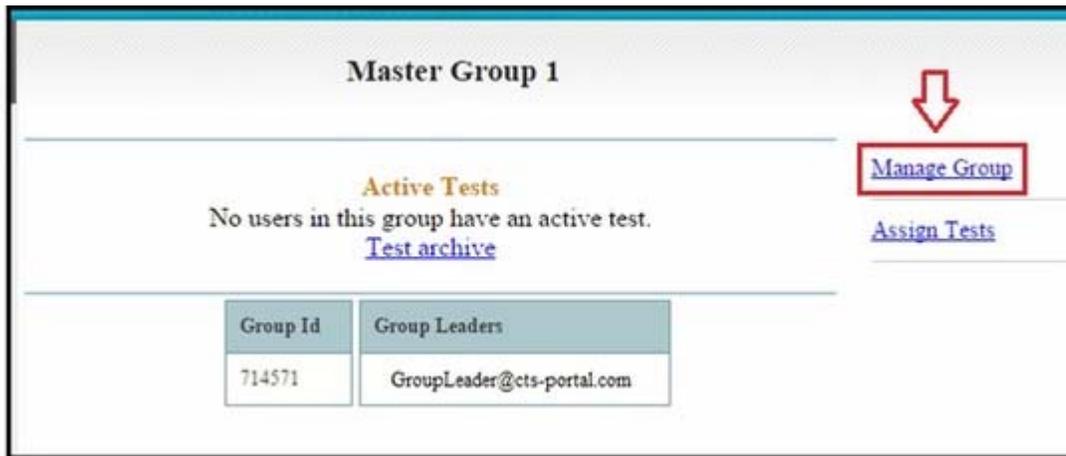


## Adding a Sub-Group

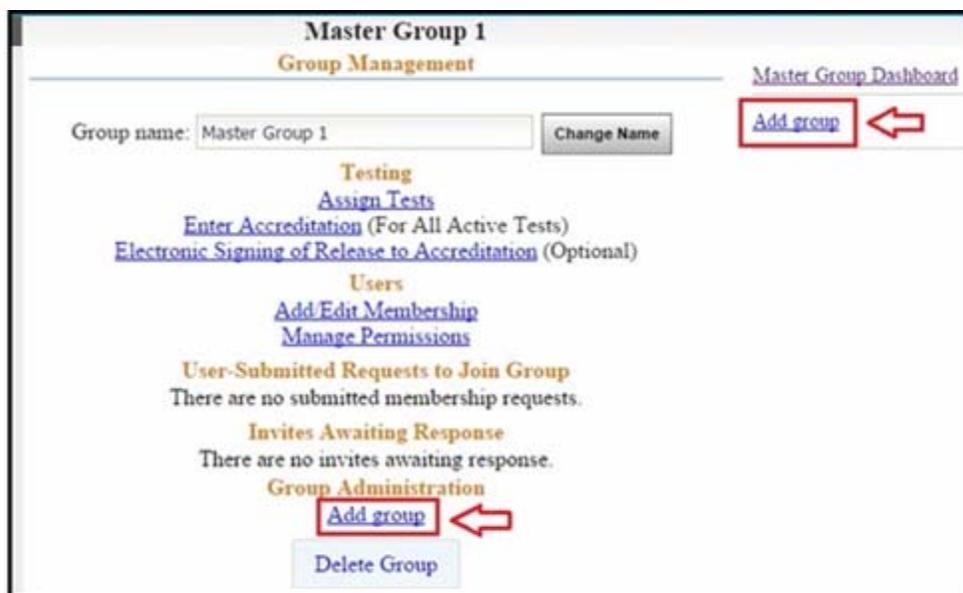
Click on "Master Group Dashboard" listed under the Master Group.



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"](#)).*

The screenshot shows the 'Master Group 1' interface. At the top, there is a 'New Test Group' section with a 'Manage' link. Below this, there are two options for adding a group. The first option is 'Add a new group:', which includes a text input field containing 'Sub Group 1' and a 'Create Group' button. The second option is 'Or pick an existing group:', which includes a dropdown menu showing 'Tech Review 123' and an 'Add Group' button. Red arrows point to the 'Create Group' and 'Add Group' buttons, and a red arrow points to the dropdown menu.

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

The screenshot shows a confirmation message: 'The following group has been created:'. Below this, there is a box containing the group name 'Sub Group 1' and its ID 'ID: 490098'. Underneath the group name, there are two links: 'Actions' and 'Review Dashboard'. At the bottom of the box, there is a link to 'Add members to this group through the add/edit membership link.' A 'Manage' link is visible in the top right corner.

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.

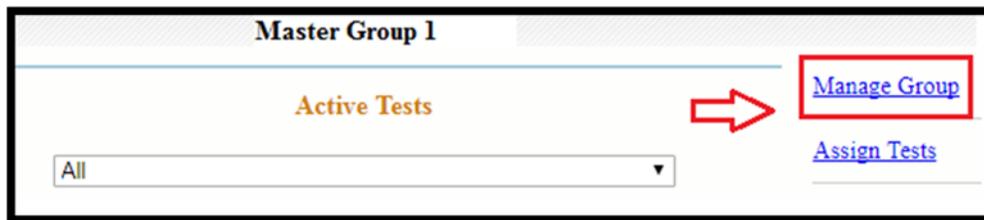
## Adding/Removing Users to/from the Master Group

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.

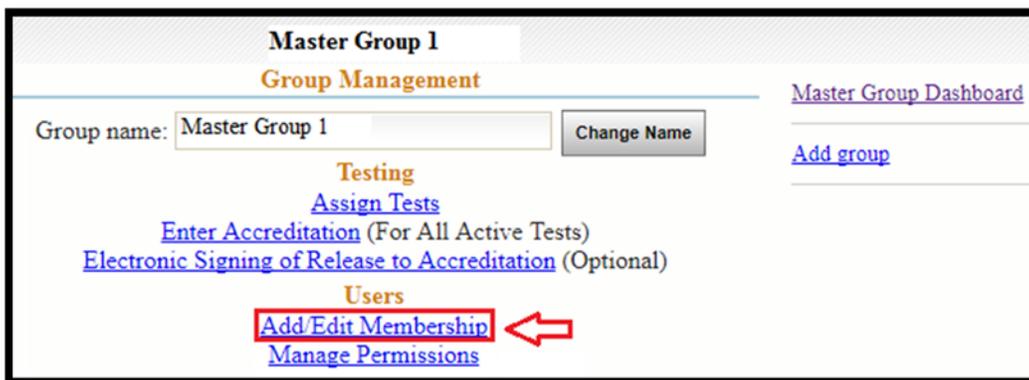
Click on "Master Group Dashboard" under your Master Group



Click on “Manage Group” on the Dashboard page.



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

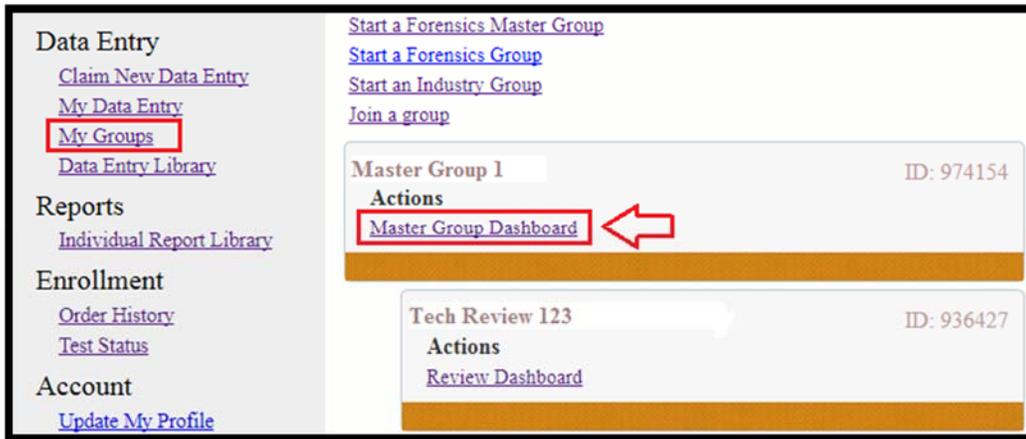


**Note:** Removing a user from the Master Group will delete the user from any Group associated with the Master Group. However, removing a user from a sub-group will not remove them from the Master Group or any other groups. To delete a user from all the sub-groups, delete them one time from the Master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

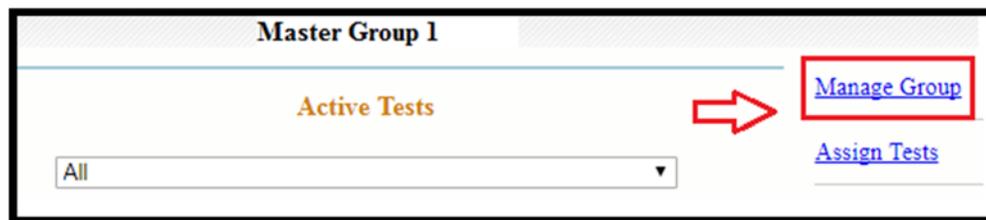
# How to Set Permissions for Forensics Master Group Members

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

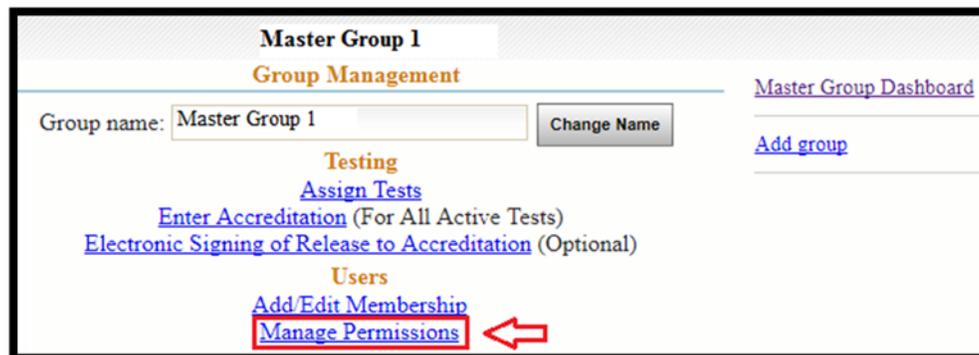
Click on "My Groups", on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.



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

User	Assign Tests	Submit to CTS in Bulk	Edit Accreditation in Bulk	eSign Accreditation	Invite Members to Master Group	Manage
<b>Group Managers</b>						
MasterGroupLeader@cts-portal.com	<input checked="" type="checkbox"/>					
<b>Group Users</b>						
AnalystA@cts-portal.com	<input type="checkbox"/>					
AnalystB@cts-portal.com	<input type="checkbox"/>					
AnalystC@cts-portal.com	<input type="checkbox"/>					
AnalystD@cts-portal.com	<input type="checkbox"/>					
AnalystE@cts-portal.com	<input type="checkbox"/>					
TechReviewer@cts-portal.com	<input type="checkbox"/>					

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.

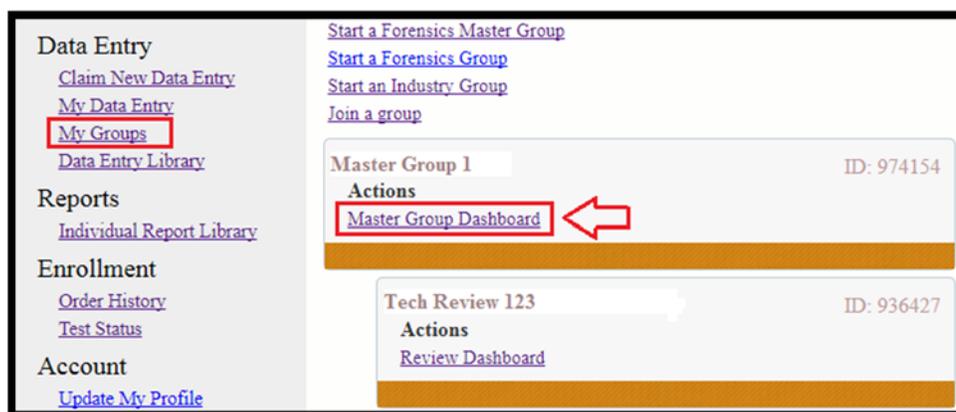
**Note:** The user who started a Master Group is automatically set as Group Manager. This user has all the permissions. Users within a Master Group receive no permissions by default. Access to all permissions must be specifically turned on by the Group Manager.

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

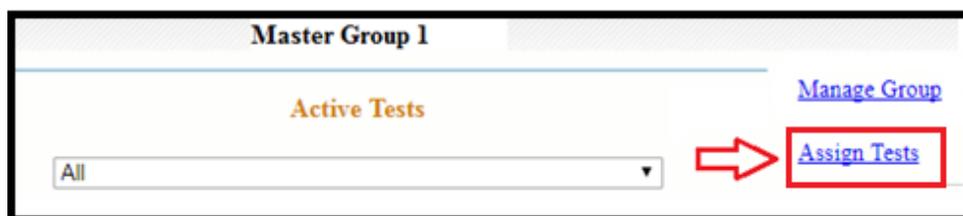
This Guide explains how to assign a test to a user through the Master Group. You will need to have the “Assign Tests” permission to complete this guide.

**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.

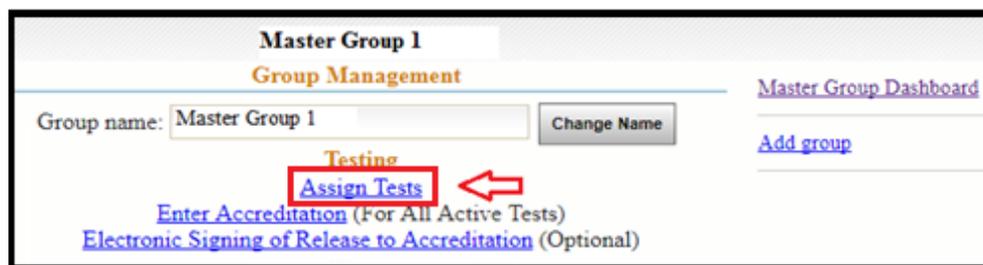
Click on "My Groups", on the left hand side under “Data Entry”. Click on "Master Group Dashboard" under the Master Group.



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



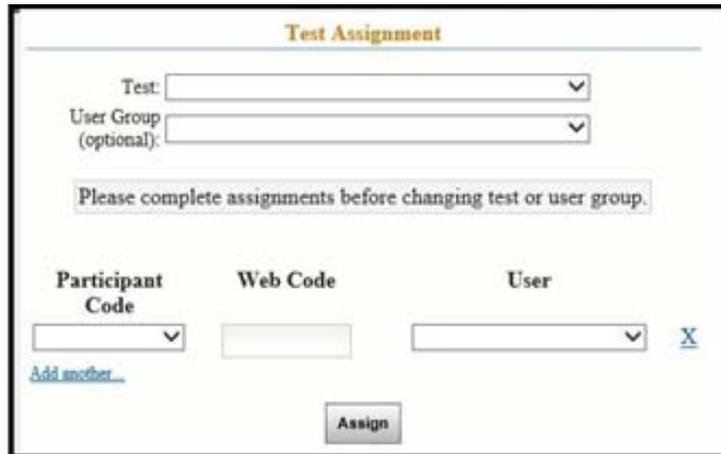
Alternatively, the Assign Tests feature can be accessed through the Group Management page.



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.

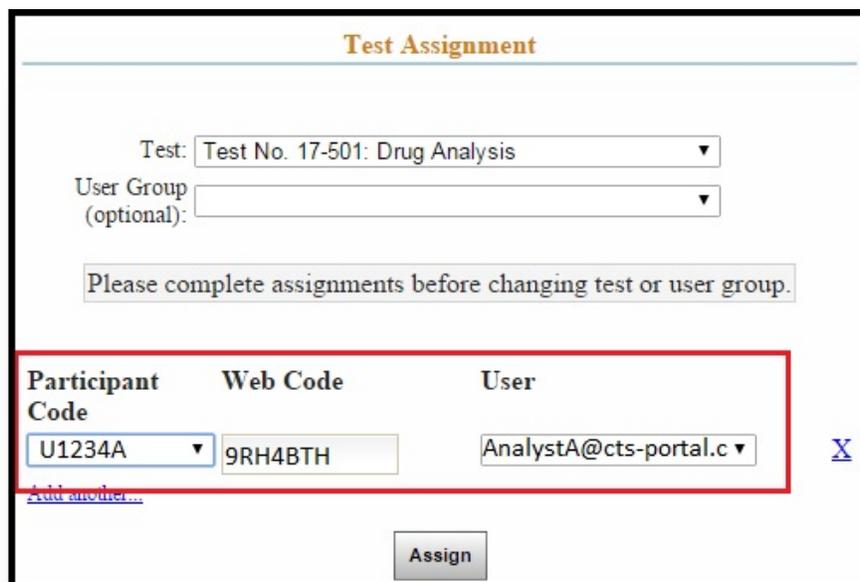
**Note:** Only one test can be selected from the drop down box on the top of the page to be assigned to users at a time.



The screenshot shows the 'Test Assignment' page with the following elements:

- Test: [Empty dropdown menu]
- User Group (optional): [Empty dropdown menu]
- Please complete assignments before changing test or user group.
- Participant Code: [Empty dropdown menu]
- Web Code: [Empty text input field]
- User: [Empty dropdown menu]
- Buttons: [Add another...](#) and

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.



The screenshot shows the 'Test Assignment' page with the following elements:

- Test: Test No. 17-501: Drug Analysis
- User Group (optional): [Empty dropdown menu]
- Please complete assignments before changing test or user group.
- Participant Code: U1234A
- Web Code: 9RH4BTH
- User: AnalystA@cts-portal.c
- Buttons: [Add another...](#) and

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.

Participant Code	Web Code	User	
U1234A	9RH4BTH	AnalystA@cts-portal.c	X
U1234C	KF56N2BB	AnalystB@cts-portal.c	X

[Add another...](#)

**Please Note:**  
There is a 30 minute inactivity time out for all single pages of the CTS Portal. However, unlike data entry, this page is not automatically saved if the 30 minute timer is reached. 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.

Participant Code	Web Code	User	
U1234A	9RH4BTH	AnalystA@cts-portal.c	X
U1234C	KF56N2BB	AnalystB@cts-portal.c	X

[Add another...](#)

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**

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

[Master Group Dashboard](#)  
[Manage Group](#)  
[Assign more tests](#)  
 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](http://www.cts-portal.com)

# How to Unassign a Test

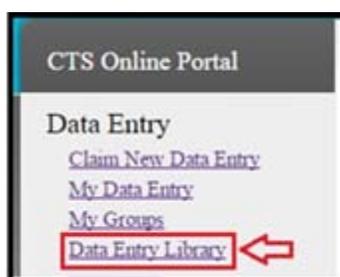
This guide walks the Lab Account Owner through unassigning a test that has been claimed/added to a user profile.

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 all entered data!**

## To Unassign a Test

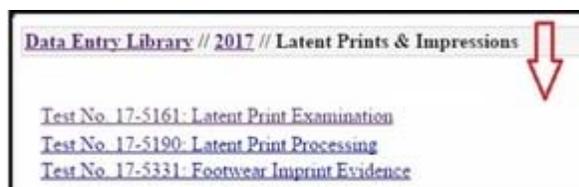
Click on “Data Entry Library”, under the “Data Entry” heading on the left hand side of the screen.



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 all entered data!**

Click on the “Remove User” button.

10 test(s). Data Due Date: Oct. 30, 2017, 11:59 p.m.

Participant Code	User	Submitted Online	Request Emailed PDF Version	Remove User and Delete all Data for Participant Code
<a href="#">U1234A</a>	AnalystA@cts-portal.com	No	<input type="checkbox"/>	<input checked="" type="checkbox"/> ←
<a href="#">U1234B</a>	AnalystB@cts-portal.com	No	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">U1234C</a>	AnalystC@cts-portal.com	No	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">U1234D</a>	AnalystD@cts-portal.com	No	<input type="checkbox"/>	<input type="checkbox"/>

↑

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.

Deleted data for 1 test(s). ←

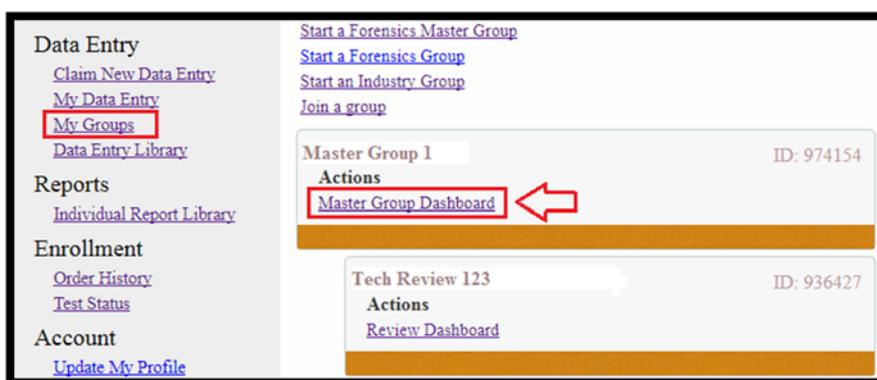
10 test(s). Data Due Date: Oct. 30, 2017, 11:59 p.m.

Participant Code	User	Submitted Online	Request Emailed PDF Version	Remove User and Delete all Data for Participant Code
<a href="#">U1234A</a>			<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">U1234B</a>	AnalystB@cts-portal.com	No	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">U1234C</a>	AnalystC@cts-portal.com	No	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">U1234D</a>	AnalystD@cts-portal.com	No	<input type="checkbox"/>	<input type="checkbox"/>

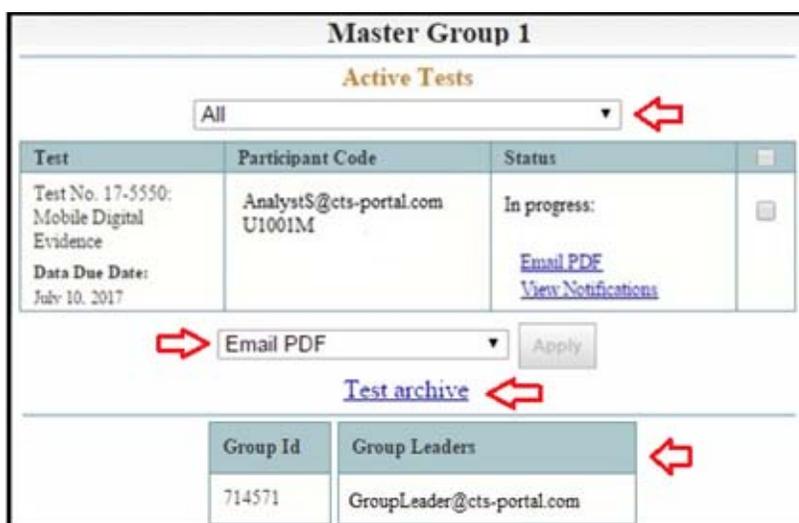
# How to Perform Master Group Dashboard Actions

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.

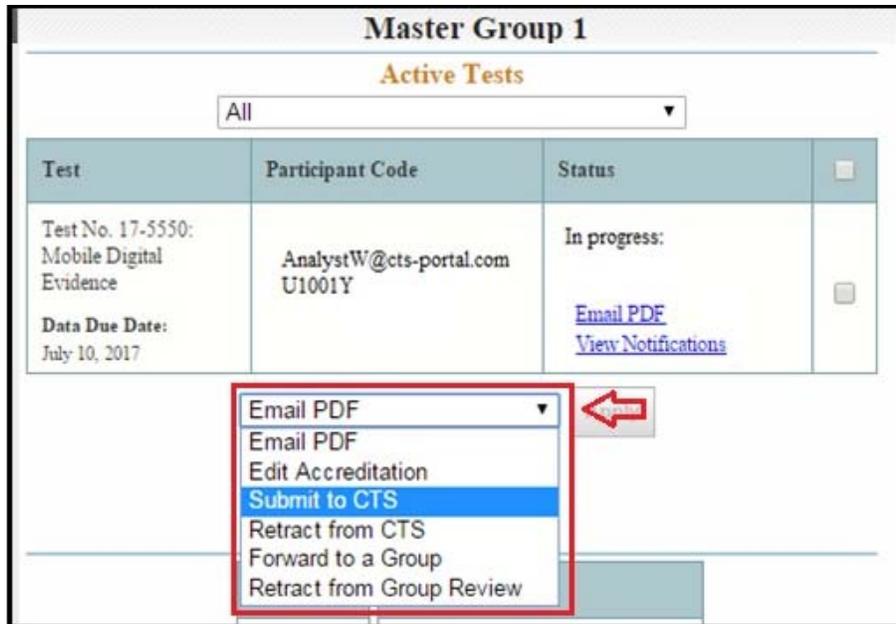
Master Group 1			
Active Tests			
Test No. 17-529: Toolmarks Examination			
Test	Participant Code	Status	
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystA@cts-portal.com U1234C	In progress <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystB@cts-portal.com U1234E	In review: <a href="#">CTS Firearms Group (Unclaimed)</a> <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystC@cts-portal.com U1234K	Submitted September 15, 2017 <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>

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.

Master Group 1			
Active Tests			
Test No. 17-529: Toolmarks Examination			
Test	Participant Code	Status	
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystA@cts-portal.com U1234C	In progress <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>

## 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.



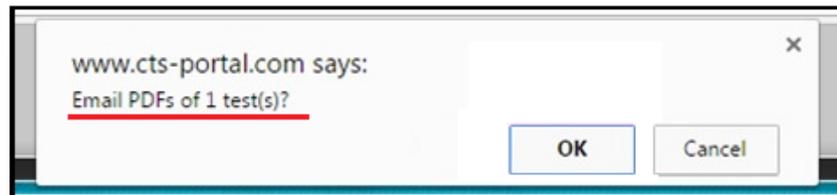
Bulk Actions available:

- **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](#)"

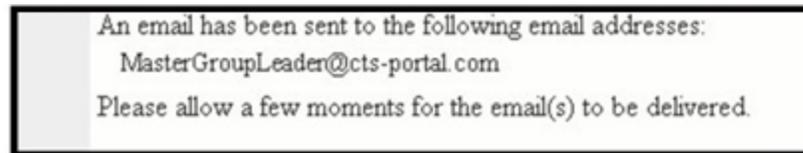
- **Forward to/ Retract From a Group** – Allows user to move a test in or out of a sub-group. These actions are helpful if a test has gotten “stuck” due to a user/reviewer being unavailable. See detailed walkthrough below.

## E-mail PDF

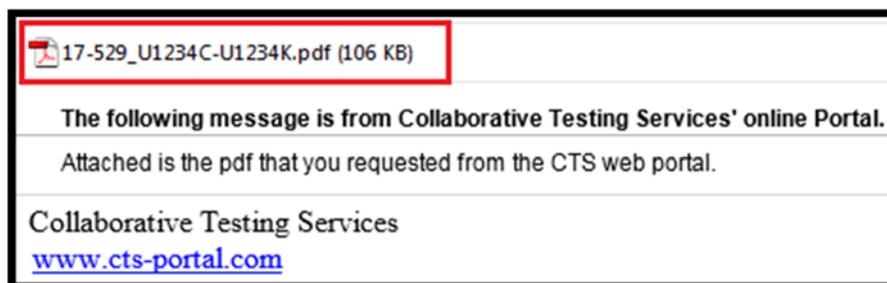
After selecting the E-mail PDF action, a pop up is triggered to confirm the number of tests and the action you wish to perform.



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



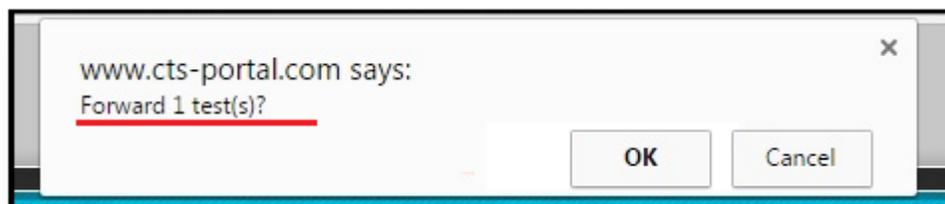
The E-mail will contain one PDF of all selected tests merged into one document.



## 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

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

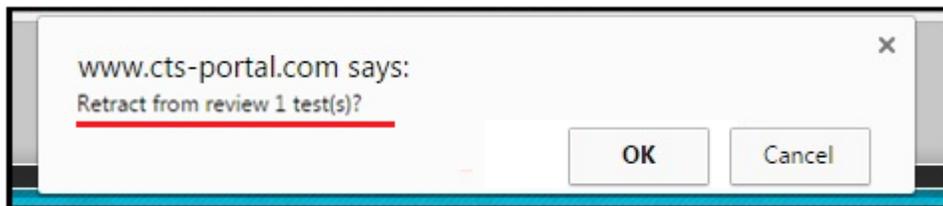
Submit to group:

Sub Group 1

### 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.

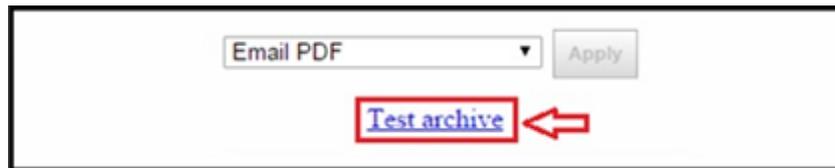


The Master Group Dashboard will refresh once the action has completed and the retracted test(s) will show as “In progress”. The test(s) will need to be resubmitted to CTS prior to the Data Due Date to be included in the final report.

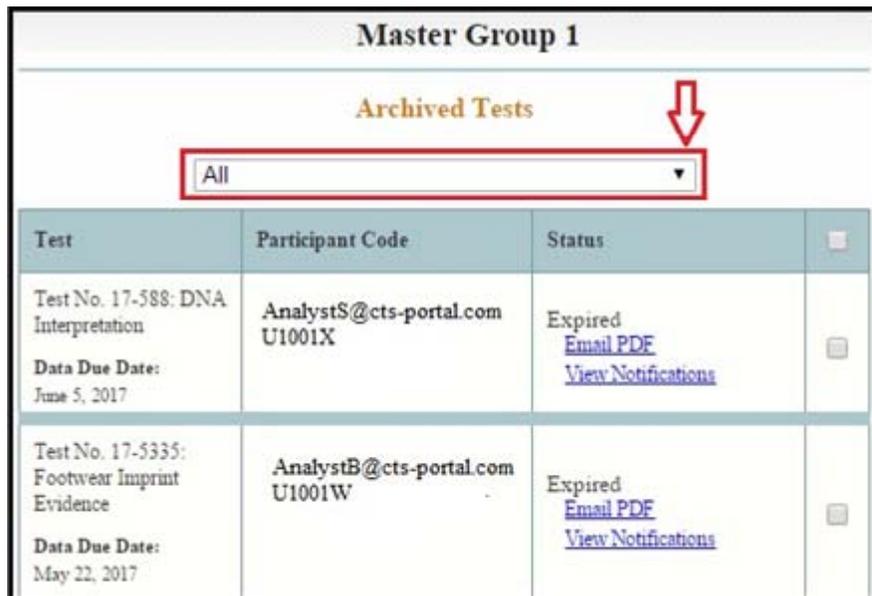
## Test Archive

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.



Master Group 1

Archived Tests

All

Test	Participant Code	Status	
Test No. 17-588: DNA Interpretation Data Due Date: June 5, 2017	AnalystS@cts-portal.com U1001X	Expired <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>
Test No. 17-5335: Footwear Imprint Evidence Data Due Date: May 22, 2017	AnalystB@cts-portal.com U1001W	Expired <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>

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

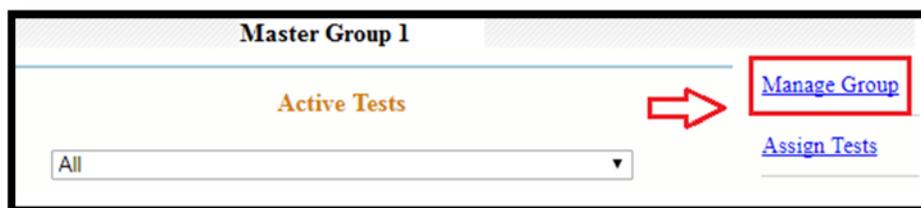
This guide explains how to enter in Accreditation information for all active tests claimed by users within a Master Group and Sub-Groups. It also explains how the electronic signing of release to Accreditation feature works.

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

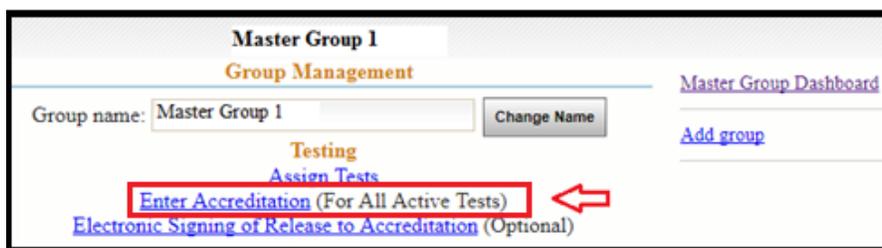


## To Complete Accreditation in Bulk for All Active Tests

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.

The screenshot shows a web interface titled "Master Group 1" with a sub-section "Active Tests". A dropdown menu at the top shows "Test No. 17-529: Toolmarks Examination". Below this is a table with two rows of test data. The first row is for "AnalystA@cts-portal.com" with participant code "U1234E", and the second row is for "AnalystB@cts-portal.com" with participant code "U1234K". Both rows show "In progress" status and links for "Email PDF", "View", and "Notifications". A red box highlights a checkmark in the rightmost column of the first row. Below the table, a dropdown menu is open, showing options: "Edit Accreditation", "Email PDF", "Submit to CTS", "Retract from CTS", "Forward to a Group", and "Retract from Group Review". The "Edit Accreditation" option is highlighted with a red box. To the right of the dropdown is an "Apply" button, with a red arrow pointing to it.

Test	Participant Code	Status	
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystA@cts-portal.com U1234E	In progress <a href="#">Email PDF</a> <a href="#">View</a> <a href="#">Notifications</a>	<input checked="" type="checkbox"/>
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystB@cts-portal.com U1234K	In progress <a href="#">Email PDF</a> <a href="#">View</a> <a href="#">Notifications</a>	<input type="checkbox"/>

Edit Accreditation  
Email PDF  
**Edit Accreditation**  
Submit to CTS  
Retract from CTS  
Forward to a Group  
Retract from Group Review

Apply

## 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.

The screenshot shows a table with the following columns: "Test Number", "Participant Code", "Intended for Release", "ASCLD/LAB Certificate No.", "ANAB Certificate No.", "A2LA Certificate No.", and "Authorized Contact Person and Title". The "Intended for Release" column has a dropdown menu with "Not Selected" selected. Below the table is a "Save" button.

Test Number	Participant Code	Intended for Release	ASCLD/LAB Certificate No.	ANAB Certificate No.	A2LA Certificate No.	Authorized Contact Person and Title
529	U1234E	Not Selected				
529	U1234K	Not Selected				

Save

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.

Test Number	Participant Code	Intended for Release	AS
		<a href="#">Copy to All</a> <a href="#">Overwrite to All</a>	Not Selected ▼ ▼ ▼
5550	U1234D		Not Selected ▼ ▼ ▼

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.

Test Number	Participant Code	Intended for Release	ASCLD/LAB Certificate No.
		<a href="#">Copy to All</a> <a href="#">Overwrite to All</a>	Not Selected ▼ ▼ ▼
529	U1234E	Not Selected ▼	
529	U1234K	Not Selected ▼	

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

Test Number	Participant Code	Intended for Release	AS
		<a href="#">Copy to All</a> <a href="#">Overwrite to All</a>	Not Selected ▼ ▼ ▼
529	U1234E	Do not release ▼	
529	U1234K	Release ▼	ALI-99

Save

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.

The screenshot shows the 'Master Group 1 Active Tests' table. The table has columns for 'Test', 'Participant Code', and 'Status'. A dropdown menu is set to 'All'. The first row contains the following data:

Test	Participant Code	Status	
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystA@cts-portal.com U1234E	In progress <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>

The screenshot shows a notification message with the following content:

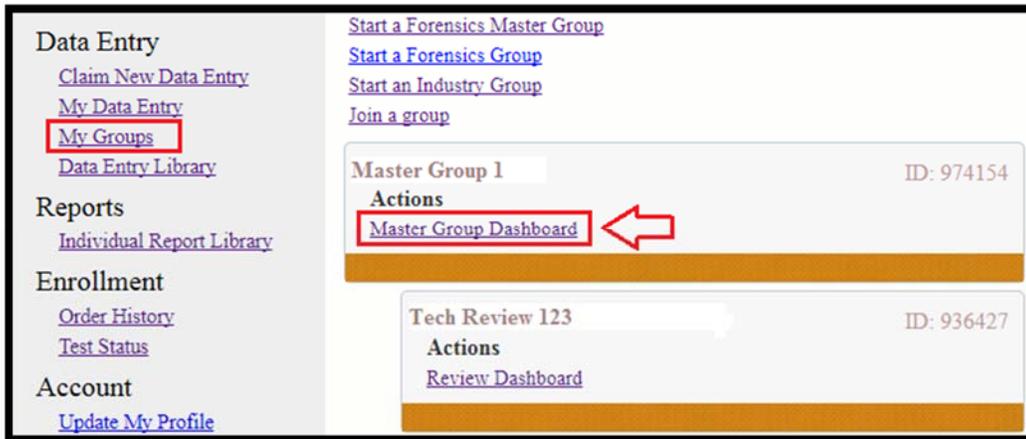
Showing notifications for: U1234E

09/15/2017 08:06AM	The group Master Group 1 has edited accreditation information for Test No. 17-529: Toolmarks Examination, for participant code U1234E.
-----------------------	--

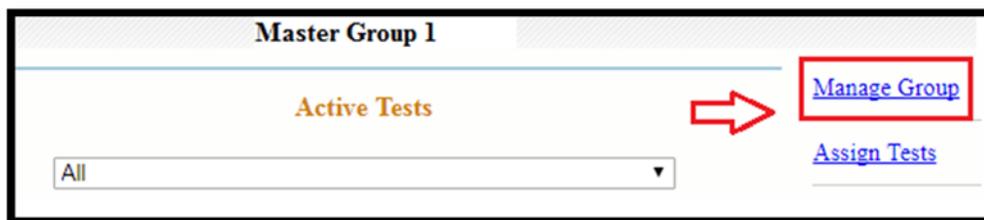
## Electronic Signing of Release to Accreditation (optional)

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.

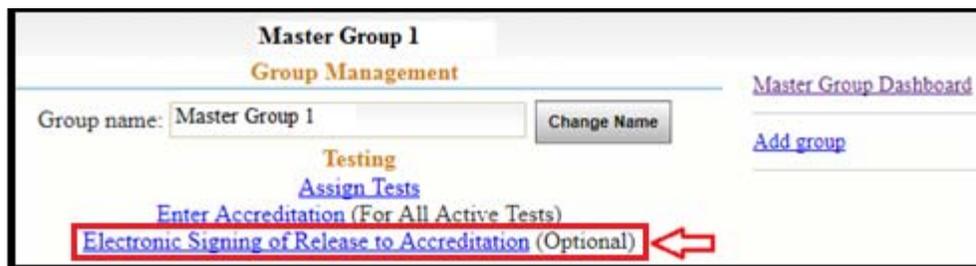
Click on "My Groups" on the left hand side under "Data Entry". Click on "Master Group Dashboard" under the Master Group.



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.

Test	Participant Code	<input type="checkbox"/>
Test No. 17-5550: Mobile Digital Evidence	AnalystA@cts-portal.com U1001A	<input type="checkbox"/>
Test No. 17-5550: Mobile Digital Evidence	AnalystB@cts-portal.com U1001B	<input type="checkbox"/>
Test No. 17-5550: Mobile Digital Evidence	AnalystC@cts-portal.com U1001C	<input type="checkbox"/>

A confirmation message will be displayed.

**Master Group 1**  
**Electronic Signing**

The signing process has started for the selected tests. You will receive an email containing a link that must be followed to complete the process.

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

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

By following [this link](#), you will be digitally signing the following tests:

Test: Test No. 17-529: Toolmarks Examination  
Participant Codes: U1234E,U1234K

Collaborative Testing Services  
[www.cts-portal.com](http://www.cts-portal.com)

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**

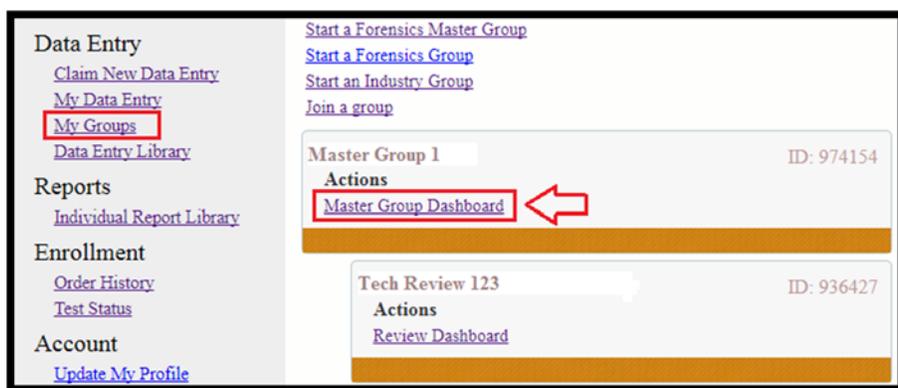
09/15/2017 08:29AM	Your test Test No. 17-529: Toolmarks Examination, for participant code U1234E, has been signed and accreditation information may have been updated.
-----------------------	---

# 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.

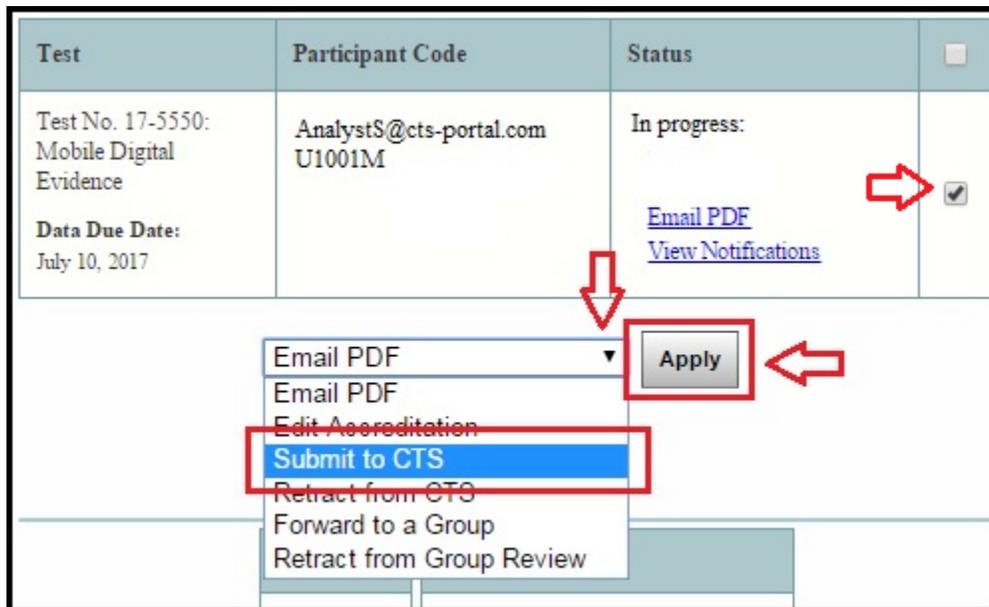


A list of all the active tests for all members of the Master Group will be displayed. To show only a specific active test, use the drop down menu at the top.

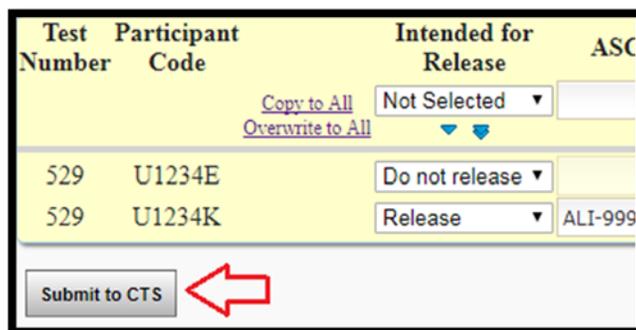
The screenshot shows the 'Master Group 1' page with a table of 'Active Tests'. At the top, there is a dropdown menu labeled 'Active Tests' with 'All' selected (indicated by a red arrow). The table has columns for Test, Participant Code, Status, and a checkbox. The data is as follows:

Test	Participant Code	Status	
Test No. 17-5550: Mobile Digital Evidence Data Due Date: July 10, 2017	AnalystR@cts-portal.com U1001L	In review: <a href="#">Sub Group 1 (Unclaimed)</a> <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>
Test No. 17-5550: Mobile Digital Evidence Data Due Date: July 10, 2017	AnalystS@cts-portal.com U1001M	In progress: <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>
Test No. 17-5550: Mobile Digital Evidence Data Due Date: July 10, 2017	AnalystT@cts-portal.com U1001N	In progress: <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>

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.*



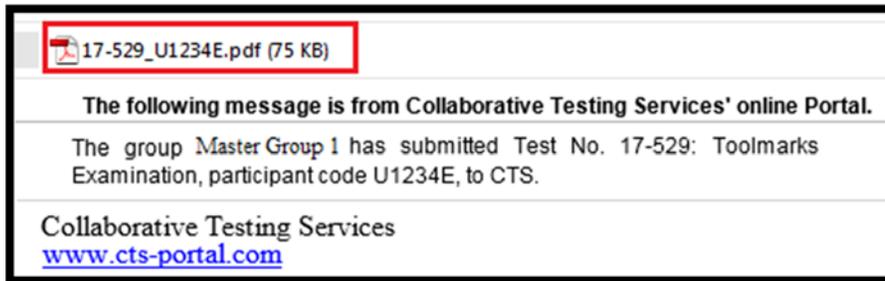
The Enter Accreditation page will open. Enter, edit, or review as described in the walkthrough: "[How to Fill in Accreditation Information by a Master Group](#)". The only difference is that instead of the "Save" button, this version of the accreditation page will have a "Submit to CTS" button. Once the accreditation information has been completed, click "Submit to CTS".



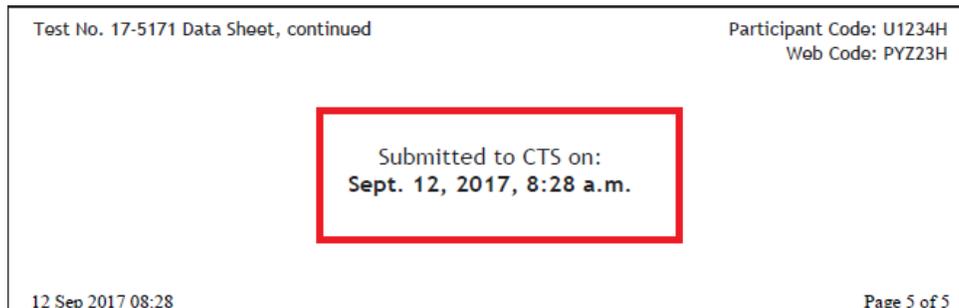
The Master Group Dashboard will open back up. The test(s) that you submitted will show up as "Submitted" under the status column.

Master Group 1			
Active Tests			
Test No. 17-529: Toolmarks Examination			
Test	Participant Code	Status	
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystA@cts-portal.com U1234E	Submitted September 15, 2017 <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystB@cts-interlab.com U1234K	Submitted September 15, 2017 <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>

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.



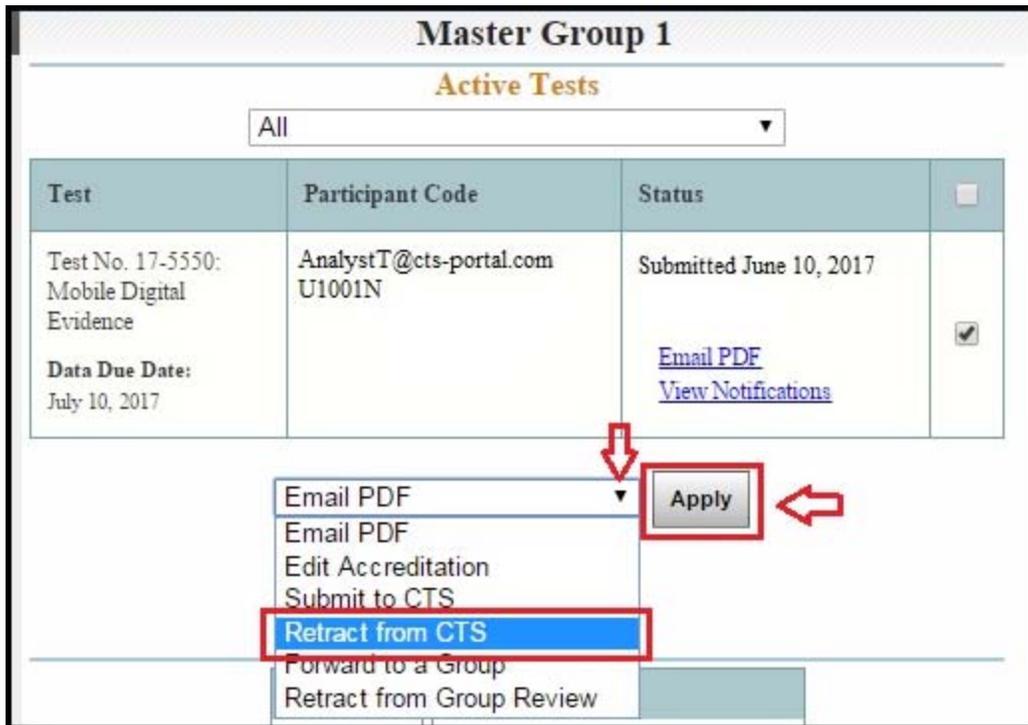
The PDF will include a submission time stamp on the last page.



## 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.



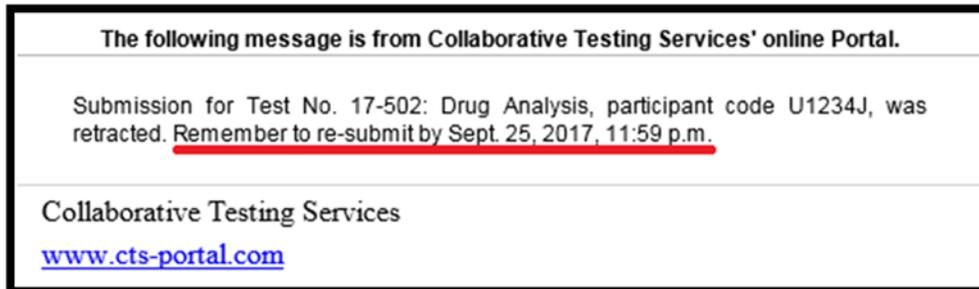
A pop up confirmation message will appear. Click "OK" to retract the test(s).



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

Master Group 1			
Active Tests			
Test No. 17-529: Toolmarks Examination			
Test	Participant Code	Status	
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystA@cts-portal.com U1234E	Submitted September 15, 2017 <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>
Test No. 17-529: Toolmarks Examination  Data Due Date: November 20, 2017	AnalystB@cts-portal.com U1234K	In progress <a href="#">Email PDF</a> <a href="#">View Notifications</a>	<input type="checkbox"/>

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



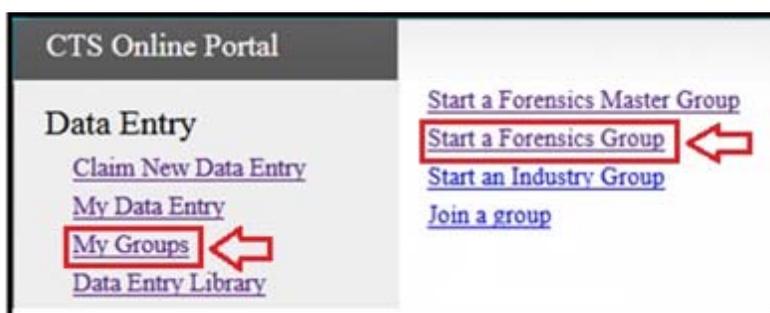
**Note:** Data can be retracted for corrections at any time prior to the Data Due Date. However, a final submission must be made prior to the Data Due Date in order for CTS to receive the data.

# 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.

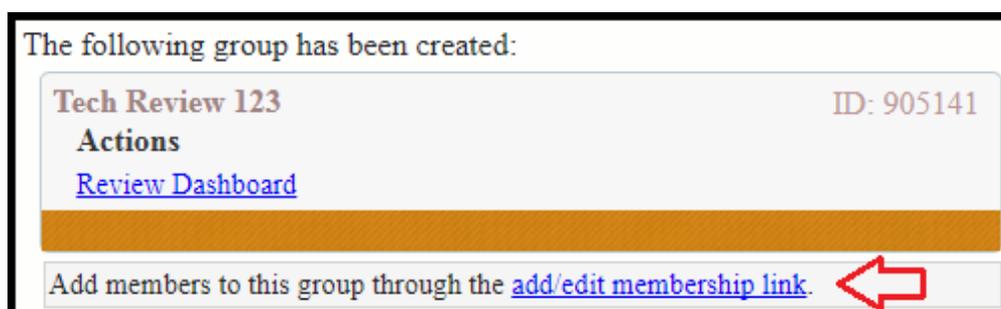
Sign onto the CTS Portal and click on "My Groups" on the left side of the page. Then, click on "Start a Forensics Group".



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.

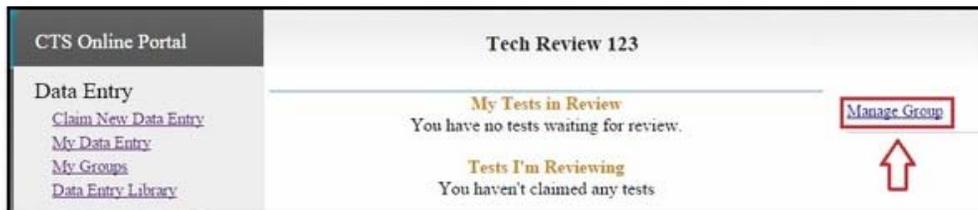
**Note:** *If you are using a Forensics Master Group with Forensic Groups as sub-groups for organizational or review purposes, you will want to create that structure prior to adding users to the sub-groups following this guide. The guide for setting up a Master Group is located here: “[How to Create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



**Add Users**

User email(s) TechReviewer@cts-portal.com  
AnalystA@cts-portal.com  
AnalystB@cts-portal.com

Invite User(s)

- Invite users by typing their email into the text input above.
- Emails must be written one on each line.
- Registered users will be emailed an invitation which they must confirm.
- Unregistered users will be emailed an invitation.

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.



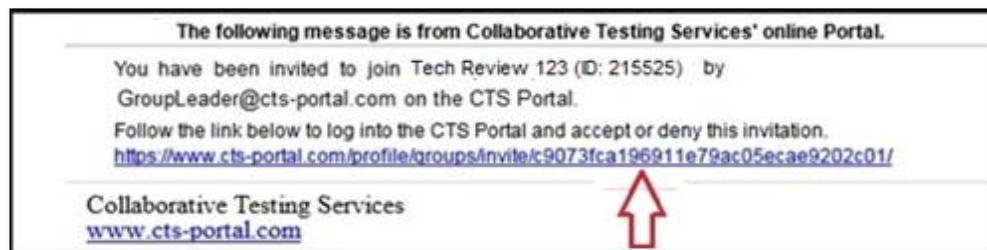
The following users have been invited to the group:

- AnalystV@cts-portal.com

The following users are not registered and have been sent an invite:

- AnalystQ@cts-portal.com

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 following message is from Collaborative Testing Services' online Portal.

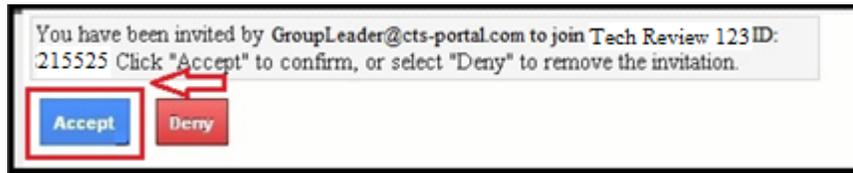
You have been invited to join Tech Review 123 (ID: 215525) by GroupLeader@cts-portal.com on the CTS Portal.

Follow the link below to log into the CTS Portal and accept or deny this invitation.

<https://www.cts-portal.com/profile/groups/invite/c9073fca196911e79ac05ecae9202c01/>

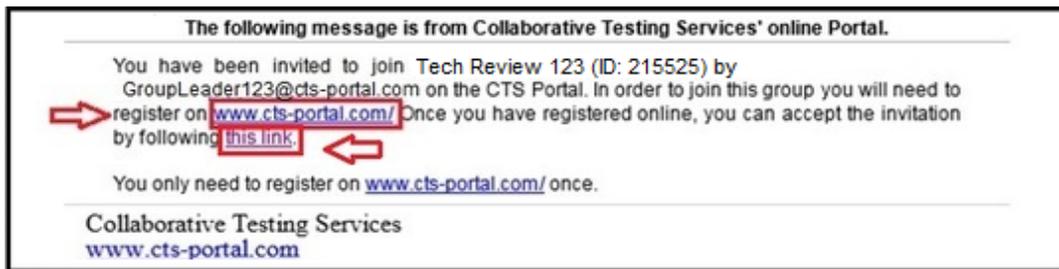
Collaborative Testing Services  
[www.cts-portal.com](http://www.cts-portal.com)

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.



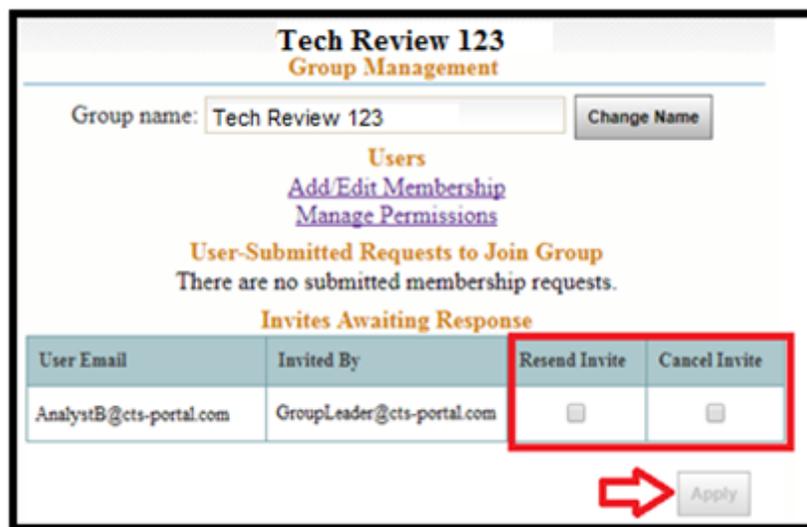
If a user is not registered, the user will receive an e-mail stating they have been invited to join a group and providing a link to register on the Portal.

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.

**Tech Review 123**

**Add/Edit Membership** [Manage Group](#)

**Add Users**

User email(s):  **Add User(s)**

-Add users by typing their email into the text input above.  
-Emails must either be separated by commas, or written one on each line.  
-Registered users will be emailed an invitation which they must confirm.  
-Unregistered users will be emailed an invitation.

**Remove Users**

User	<input type="checkbox"/>
AnalystA@cts-portal.com	<input type="checkbox"/>
AnalystB@cts-portal.com	<input type="checkbox"/>
AnalystE@cts-portal.com	<input type="checkbox"/>
AnalystT@cts-portal.com	<input type="checkbox"/>
AnalystU@cts-portal.com	<input type="checkbox"/>

**Remove User(s)**

-Removing a user from the group will clear all permissions that have been set for that user in this group and all groups underneath this one.

**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.

**Remove Users**

User	<input type="checkbox"/>
AnalystA@cts-portal.com	<input type="checkbox"/>
AnalystB@cts-portal.com	<input type="checkbox"/>
AnalystE@cts-portal.com	<input type="checkbox"/>
AnalystT@cts-portal.com	<input checked="" type="checkbox"/>
AnalystU@cts-portal.com	<input type="checkbox"/>

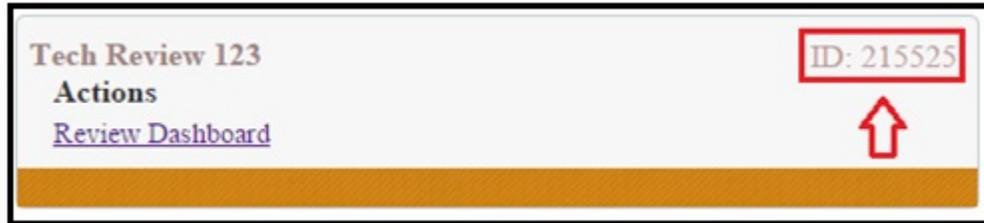
**Remove User(s)**

-Removing a user from the group will clear all permissions that have been set for that user in this group and all groups underneath this one.

**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

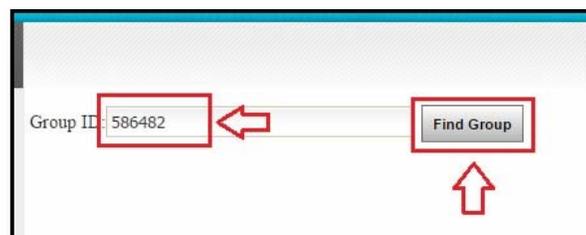
A Group ID number is located to the right of the group name on the “My Groups” page. This is needed by a user to join the group. Give this Group ID number to any user(s) who should join the group.



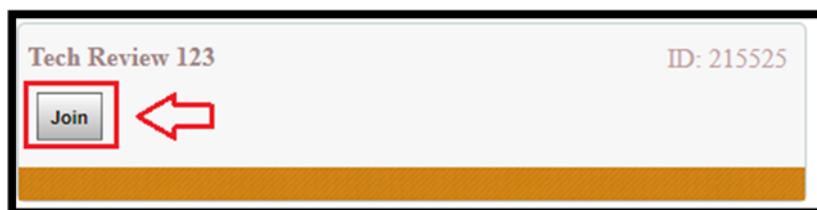
Each user will need to click on "My Groups", under the “Data Entry” heading on the left hand side, then click on "Join a group".



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.

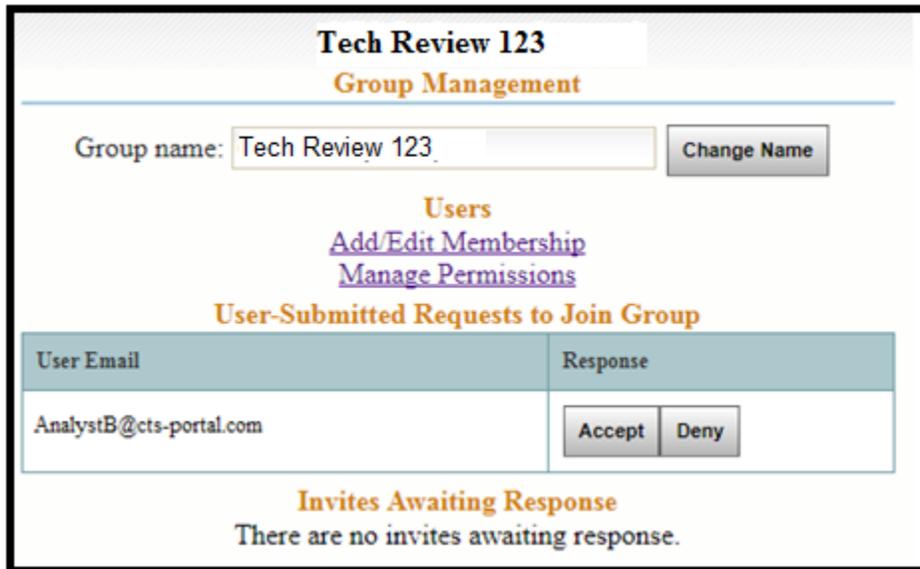


The user will see a confirmation message displayed, and the steps to request to join the group are now complete.

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:

**Users**  
[Add/Edit Membership](#)  
[Manage Permissions](#)

**User-Submitted Requests to Join Group**

User Email	Response
AnalystB@cts-portal.com	<input type="button" value="Accept"/> <input type="button" value="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 <span style="float: right;"><a href="#">Manage</a></span>									
<b>Apply</b> ←									
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
<b>Group Managers</b>									
AdditionalManager@cts-portal.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GM@cts-portal.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>							
<b>Group Users</b>									
Check/Uncheck All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AnalystA@cts-portal.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AnalystB@cts-portal.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AnalystC@cts-portal.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TechReviewer@cts-portal.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Apply</b> ←									

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.

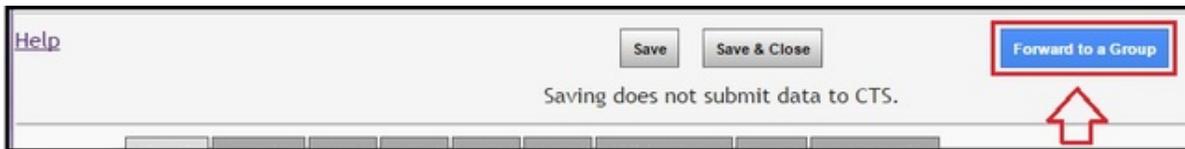
**Note:** *The user who started a group is automatically set as Group Manager. This user has all the permissions. Users within a Forensics Group receive only the first permission “Submit Tests to Group for Review” by default. The remaining permissions must be specifically turned on by the Group Manager.*

# How to Hand in a Test for Review

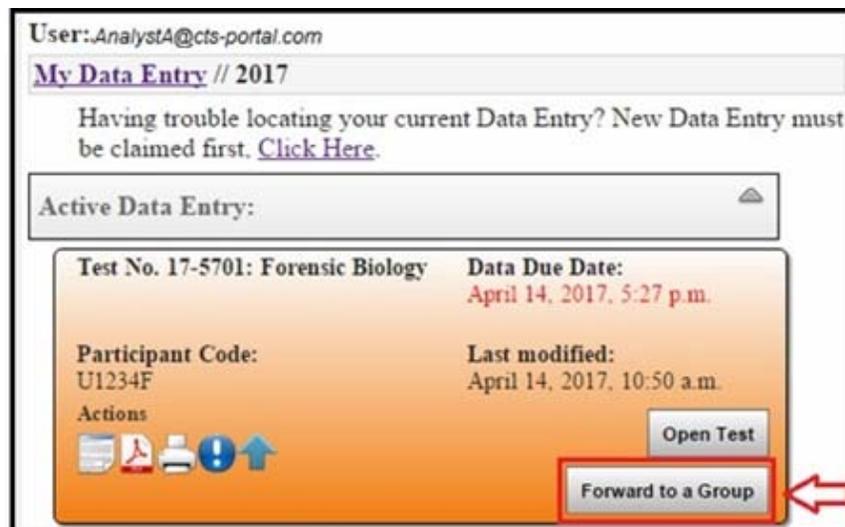
This guide walks you through forwarding a test to a group for review or submission. To use this feature you must belong to a group.

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.

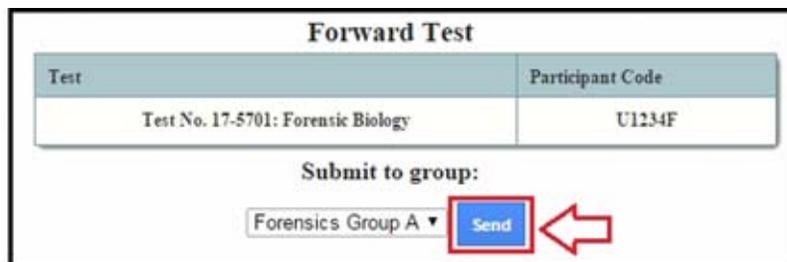
If your test is open, click "Forward to a Group" located on the upper right hand corner of your test.



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.

Your test has been submitted to the group for review. Go to the [Review Dashboard](#).

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

Forensics Group A		
My Tests in Review		
Test	Reviewer	Actions
Test No. 17-5701: Forensic Biology U1234F	Unclaimed	<a href="#">Retract</a> 

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.

Forensics Group A		
My Tests in Review		
Test	Reviewer	Actions
Test No. 17-5701: Forensic Biology U1234F	AnalystR@cts-portal.com	

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.

[My Data Entry](#) // 2017

Having trouble locating your current Data Entry? New Data Entry must be claimed first, [Click Here](#).

Active Data Entry:

<b>Test No. 17-5701: Forensic Biology</b>	<b>Data Due Date:</b> April 14, 2017, 5:27 p.m.
<b>Participant Code:</b> U1234F	<b>Last modified:</b> April 14, 2017, 10:50 a.m.
<b>Actions</b>    	<b>This test is in review by the following groups</b> <a href="#">Forensics Group A</a>

## 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.

The screenshot shows the CTS Portal interface. At the top, the user is identified as 'AnalystA@cts-portal.com'. Below this is a 'My Data Entry // 2017' section with a message: 'Having trouble locating your current Data Entry? New Data Entry must be claimed first, [Click Here](#).' Below that is an 'Active Data Entry' section for 'Test No. 17-5251: Serial Number Restoration'. It shows the 'Data Due Date' as 'Sept. 11, 2017, 11:59 p.m.', the 'Participant Code' as 'U1234A', and the 'Last modified' date as 'Aug. 9, 2017, 11:42 a.m.'. The 'Actions' section includes a blue exclamation mark icon in a red box. To the right is a 'Notifications' list with a 'Printer-friendly' link. The first notification is dated '09/08/2017 11:20AM' and states: 'Review for Test No. 17-5251: Serial Number Restoration, for participant code U1234A, has been completed by the group CTS-Sterling Laboratory Manager Group and forwarded to the group CTS-QA Group.' It has an 'Ok' link. The second notification is dated '09/08/2017 11:15AM' and states: 'Test No. 17-5251: Serial Number Restoration, for participant code U1234A, has been claimed for review by the group CTS-Sterling Laboratory Manager Group by the following reviewer:' It has an 'Ok' link.

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

The screenshot shows an email notification from Collaborative Testing Services' online Portal. The message text is: 'Test No. 17-5251: Serial Number Restoration, for participant code U1234A, has been forwarded to the group CTS-Sterling Laboratory Manager Group.' Below the message is the logo for Collaborative Testing Services and the website address [www.cts-portal.com](http://www.cts-portal.com).

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.

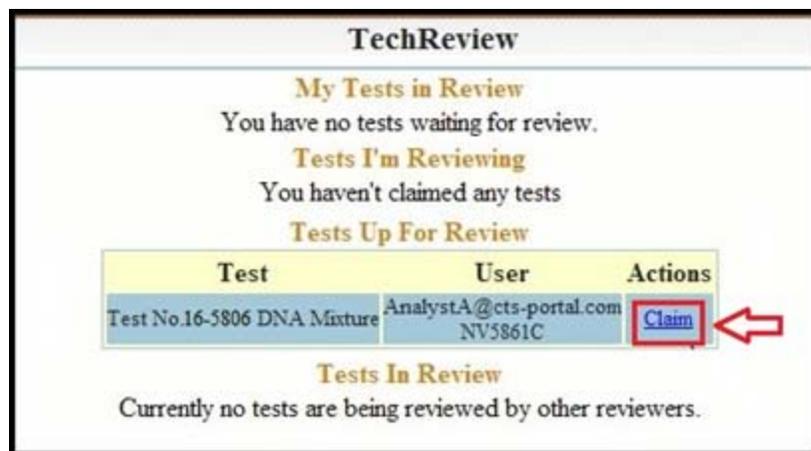


## Claim Tests

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.

Tests I'm Reviewing		
Test	User	Actions
Test No.16-5806 DNA Mixture	AnalystA@cts-portal.com NV5861C	<a href="#">Unclaim</a> <a href="#">Open</a> <a href="#">View notifications</a> <a href="#">Email PDF</a> <a href="#">Post Review Actions</a>

### 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.

## 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.

The screenshot shows a web interface titled "Tech Review 123" with a sub-header "Post Review Actions". It contains a table with two columns: "Test" and "Participant Code". The table has one row with the following data:

Test	Participant Code
Test No. 17-5301: GSR Distance Determination	U1234A

Below the table, there is a section titled "Return to original user:" with a sub-label "Comments for the user (optional):" and a text input box. Below the input box are two blue buttons: "RETURN TO USER AS INCOMPLETE" and "RETURN TO USER AS COMPLETE".

Below this section is another section titled "Submit to another group:" with a sub-label "Notify user that review is complete". It features a dropdown menu with "CTS-Sterling Laboratory Manager Group" selected and a "Send" button.

Below that is a section titled "Submit to CTS:" with a blue button labeled "Continue to Final Submission".

At the bottom, there is a grey box containing the text: "The Accreditation Release section is accessed through this button and can be completed at any time prior to submitting to CTS."

### 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.

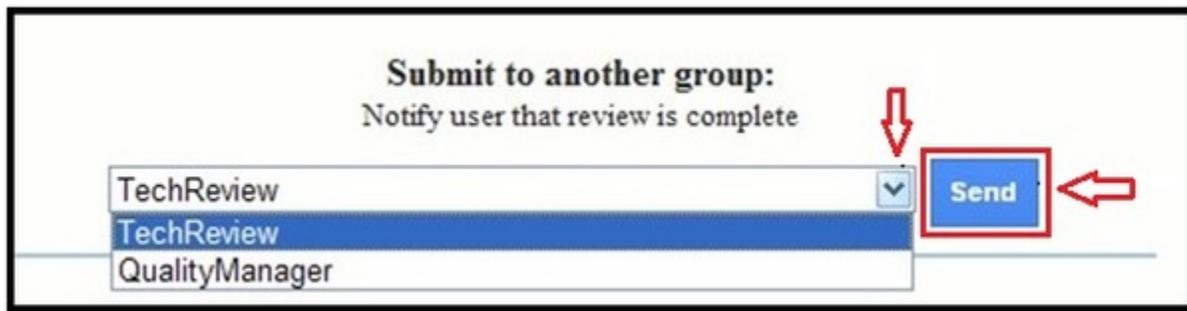
The original user will receive an e-mailed notification of this action and the test will be removed from your "Tests I'm Reviewing" section of the Review Dashboard.

This is a close-up of the "Return to original user:" section from the previous screenshot. It shows the "Comments for the user (optional):" label above a text input box with a vertical scrollbar on the right side. Below the input box are two blue buttons: "RETURN TO USER AS INCOMPLETE" and "RETURN TO USER AS COMPLETE".

### Submit to another group:

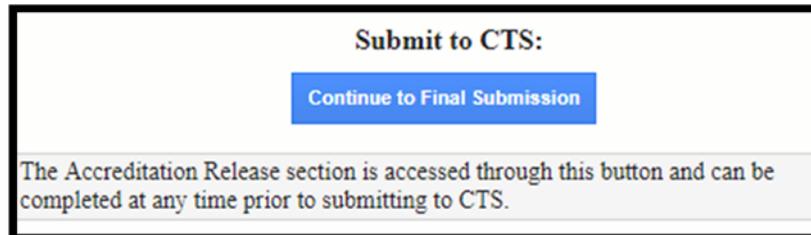
If you would like to submit the test to another group for review or final test submission, choose the correct group from the drop down list. Then click on the "Send" button. You can also submit the test to the same group for another reviewer to claim.

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.



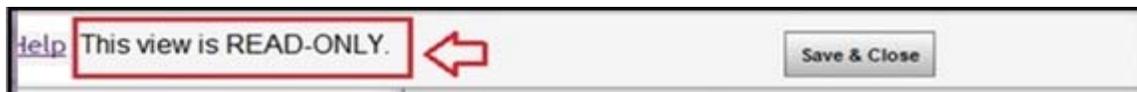
### Submit to CTS and/or Fill out or View Accreditation Information:

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.

Accreditation

Test No. 17-545 Data Sheet, continued Participant Code: U1234C  
WebCode: QP36RB

### RELEASE OF DATA TO ACCREDITATION BODIES

CTS submits external proficiency test data directly to ASCLD/LAB, ANAB, and/or A2LA. Please select one of the following statements to ensure your data is handled appropriately.

This participant's data is intended for submission to ASCLD/LAB, ANAB, and/or A2LA. (Accreditation Release section below must be completed.)

This participant's data is **not** intended for submission to ASCLD/LAB, ANAB, and/or A2LA.

Have the laboratory's designated individual complete the following steps **only if your laboratory is accredited in this testing/calibration discipline** by one or more of the following Accreditation Bodies.

**CTS REQUIRES AN ANSWER TO THE RELEASE QUESTION ABOVE**

**Step 1: Provide the applicable Accreditation Certificate Number(s) for your laboratory**

**Step 2: Complete the Laboratory Identifying Information in its entirety**

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

### RELEASE OF DATA TO ACCREDITATION BODIES

CTS submits external proficiency test data directly to ASCLD/LAB, ANAB, and/or A2LA. Please select one of the following statements to ensure your data is handled appropriately.

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Have the laboratory's designated individual complete the following steps **only if your laboratory is accredited in this testing/calibration discipline** by one or more of the following Accreditation Bodies.

**Step 1: Provide the applicable Accreditation Certificate Number(s) for your laboratory** ←

ASCLD/LAB Certificate No.

ANAB Certificate No.

A2LA Certificate No.

**Step 2: Complete the Laboratory Identifying Information in its entirety** ←

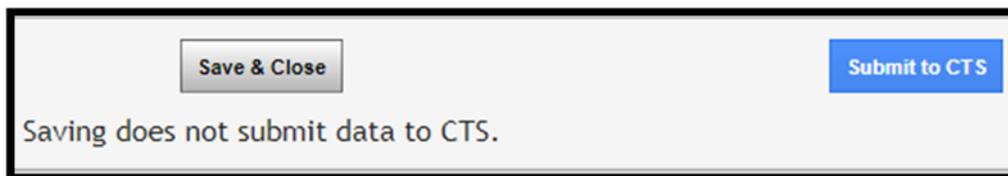
Authorized Contact Person and Title

Laboratory Name

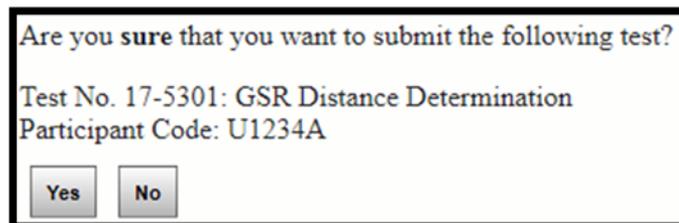
Location (City/State)

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.

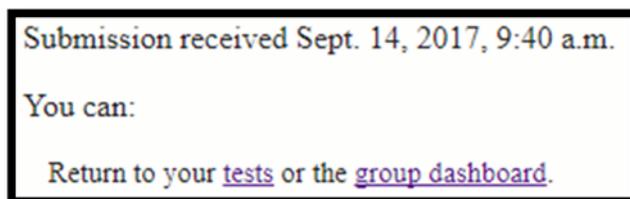
**Note:** *If the Submit to CTS button does not appear, you do not have permission to submit the test to CTS. Contact the appropriate Group Manager to have this resolved.*



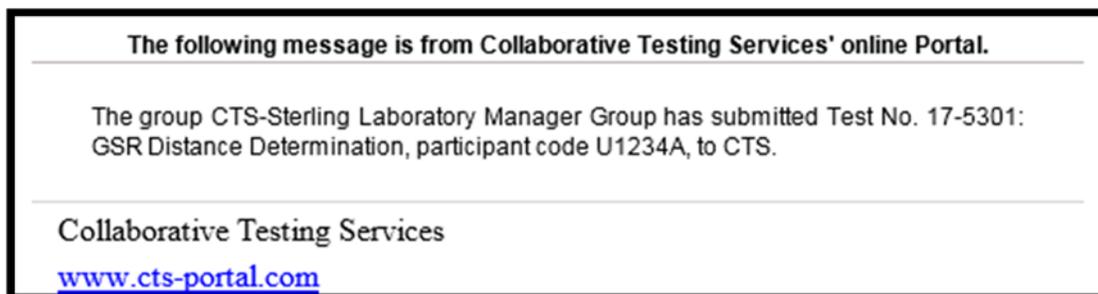
A confirmation screen will appear. Click on the "Yes" button to confirm that you would like to send the test to CTS.



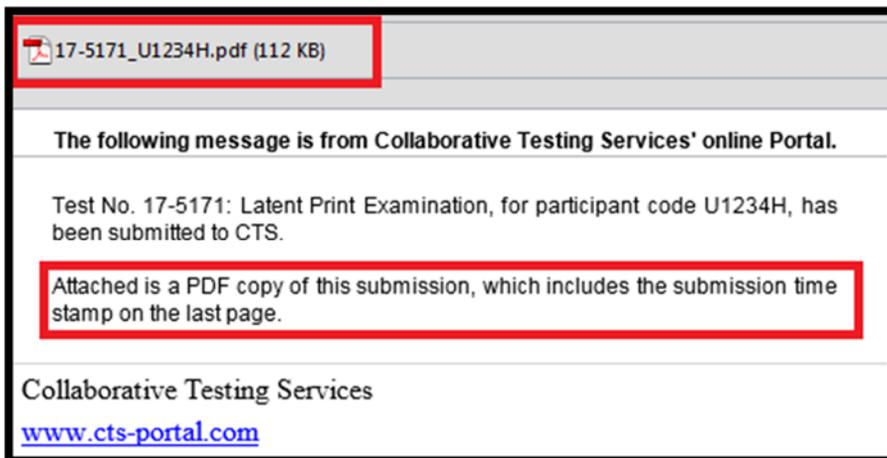
A message confirming that the test has been submitted will appear. You can return to your My Data Entry section of the portal through the "tests" link or return to the Group Dashboard through the "group dashboard" link.



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.



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

