How to Choose a Lab Setup

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

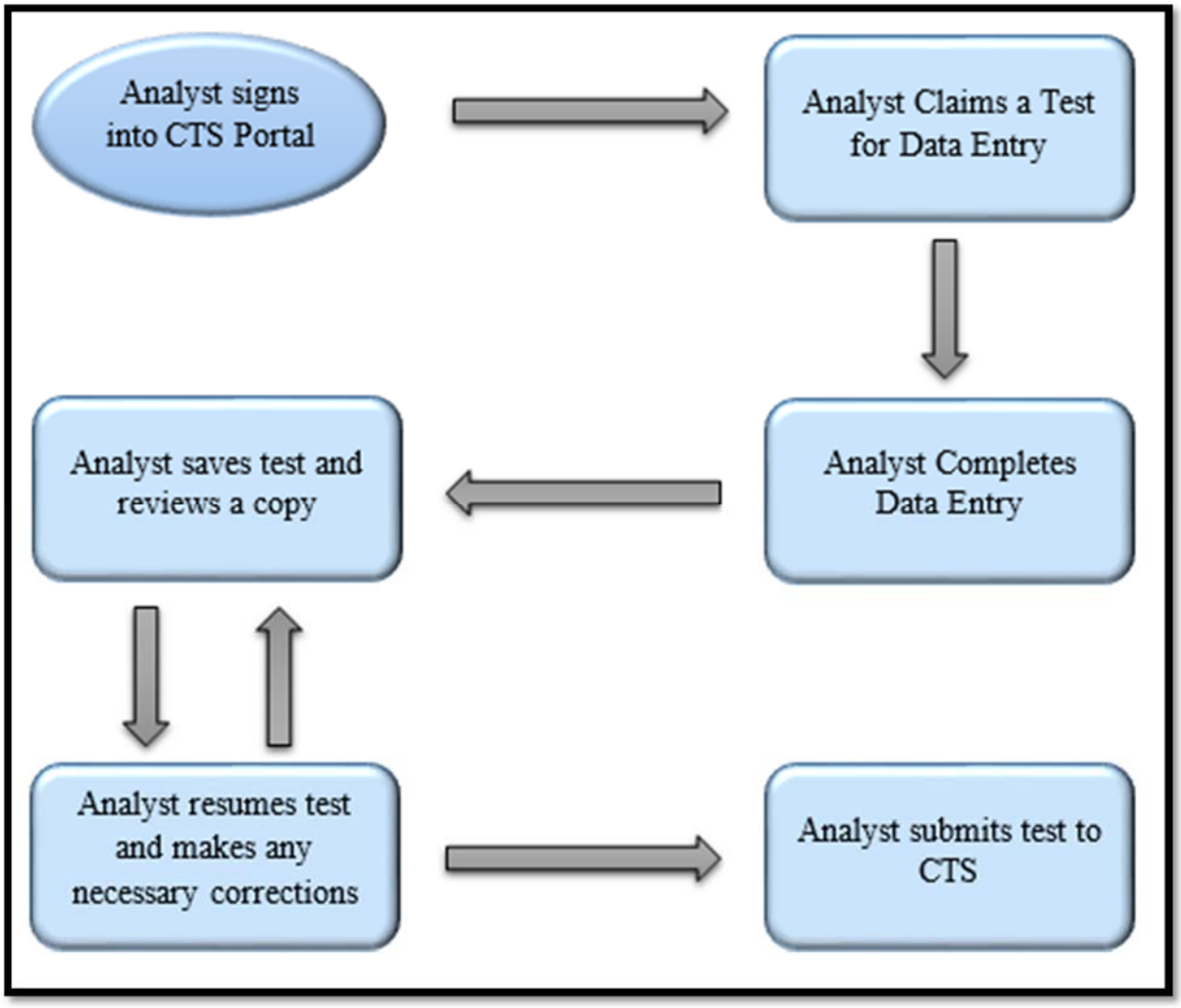
Similar to the Groups only option, more than one review/submission group can be used depending on your needs. Set up one Master Group and add as many individual groups as necessary.

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.

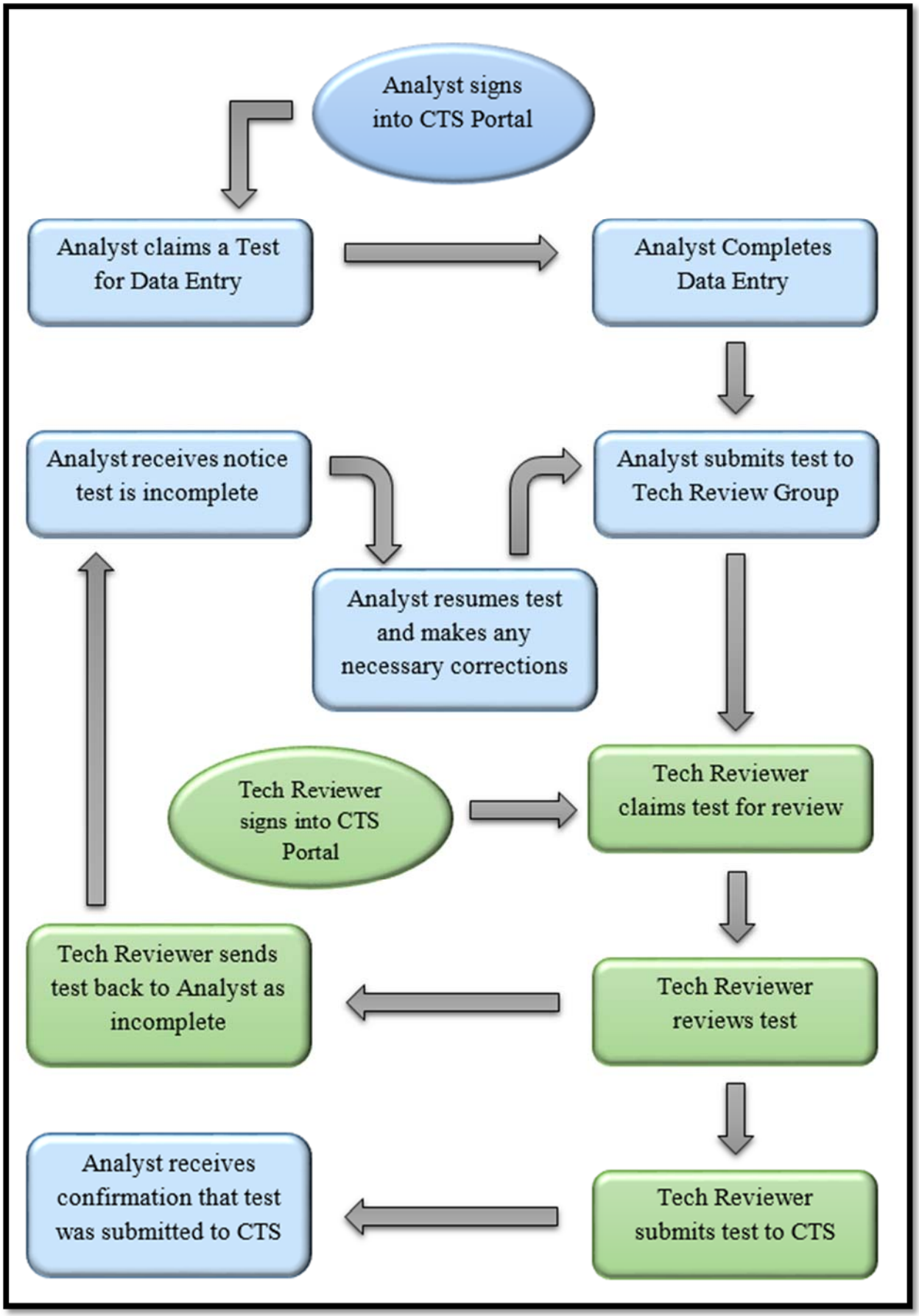


Review or Submission Groups only, no Master Group

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.


Analyst signs into CTS Portal
Analyst claims a Test for Data Entry
Analyst Completes Data Entry
Analyst submits test to Tech Review Group
Analyst receives notice test is incomplete
Analyst resumes test and makes any necessary corrections
Tech Reviewer signs into CTS Portal
Tech Reviewer claims test for review
Tech Reviewer sends test back to Analyst as incomplete
Tech Reviewer reviews test
Analyst receives confirmation that test was submitted to CTS
Tech Reviewer submits test to CTS

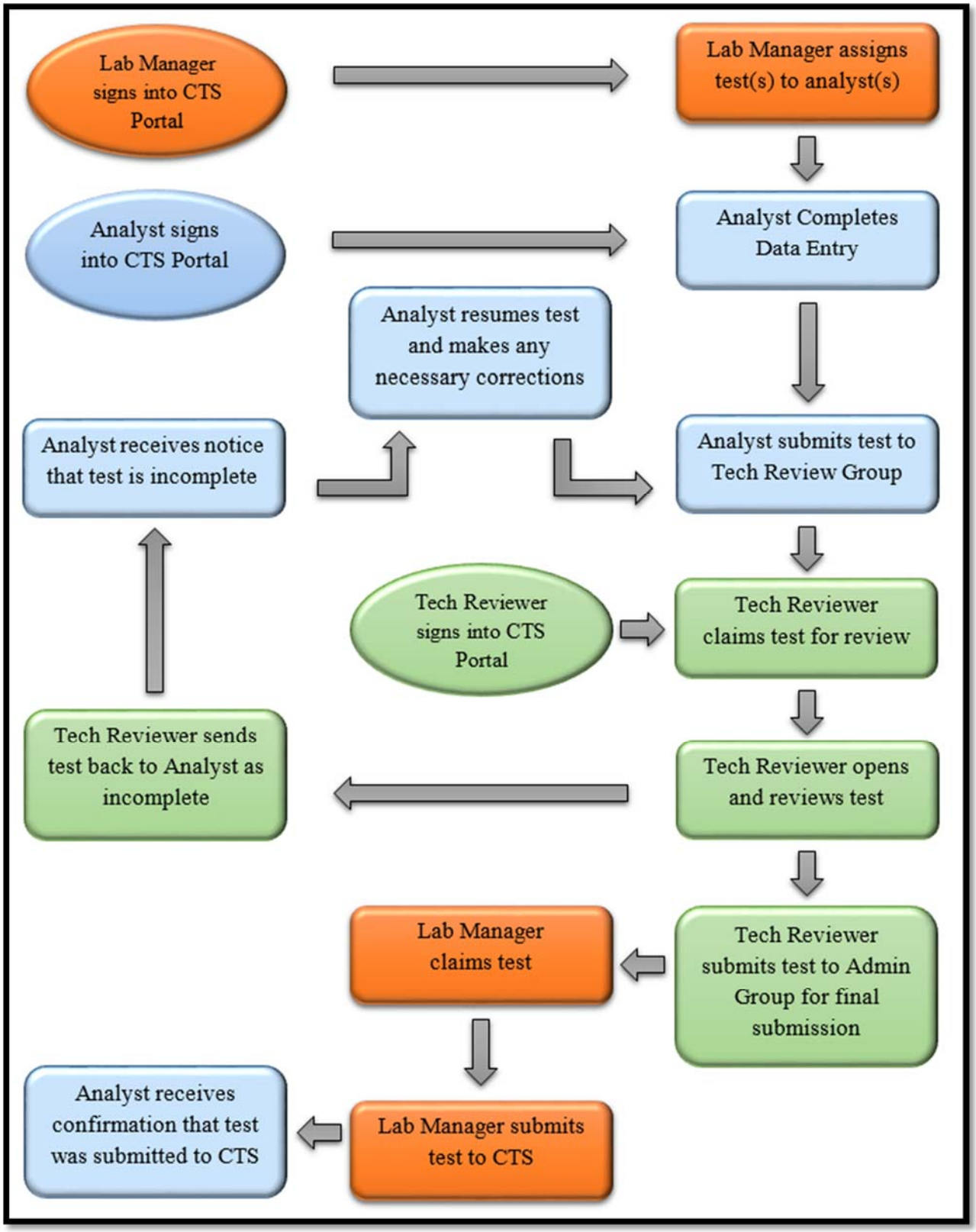
Master Group and Sub-Groups (Review or Submission Groups)

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.


Lab Manager signs into CTS Portal
Lab Manager assigns test(s) to analyst(s)
Analyst signs into CTS Portal
Analyst Completes Data Entry
Analyst resumes test and makes any necessary corrections
Analyst receives notice that test is incomplete
Analyst submits test to Tech Review Group
Tech Reviewer signs into CTS Portal
Tech Reviewer claims test for review
Tech Reviewer sends test back to Analyst as incomplete
Tech Reviewer opens and reviews test
Lab Manager claims test
Tech Reviewer submits test to Admin Group for final submission
Analyst receives confirmation that test was submitted to CTS
Lab Manager submits test to CTS