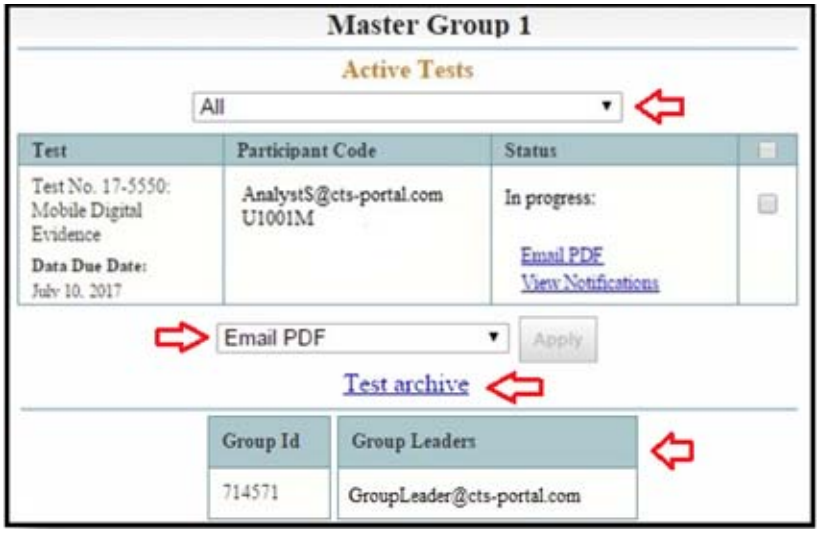
How to Perform Master Group Dashboard Actions

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

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

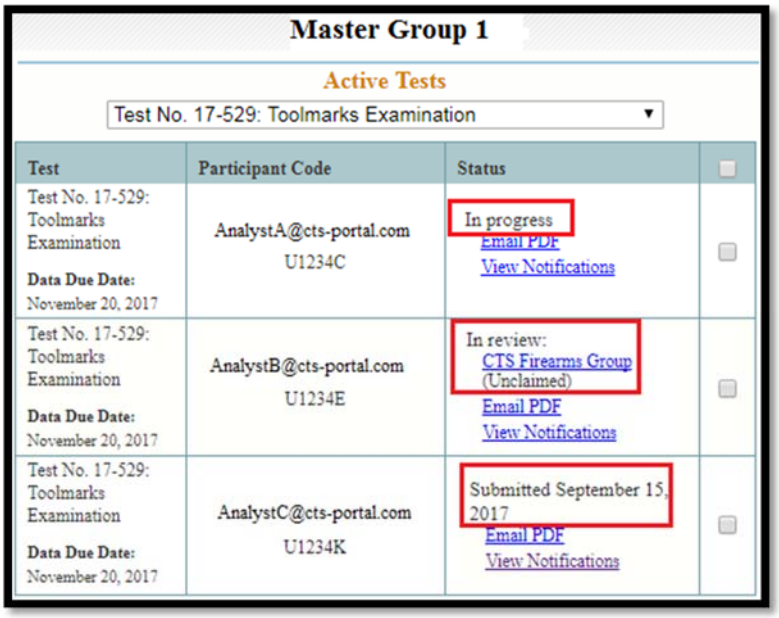
The Master Group Dashboard will open and a list of all the active tests for all members of the Master Group will be displayed. To show only a specific active test, use the drop down menu at the top to limit the list of active tests. Located below the list of active tests is the menu for bulk options, the Test Archive link and the listing of the Group ID & Group Managers.



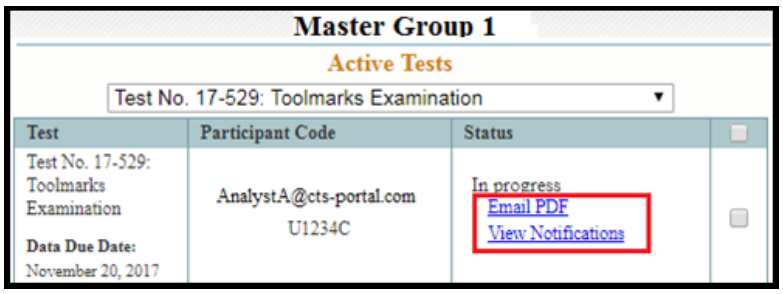
All active tests are listed on the top portion of the Dashboard. The first column lists the Test Number, Name, and Data Due Date. The second column lists the user name and participant code for the test, the third column lists the status of the test, and the fourth column is the selection box column used to perform bulk actions.

Status Options on the Master Group Dashboard:

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

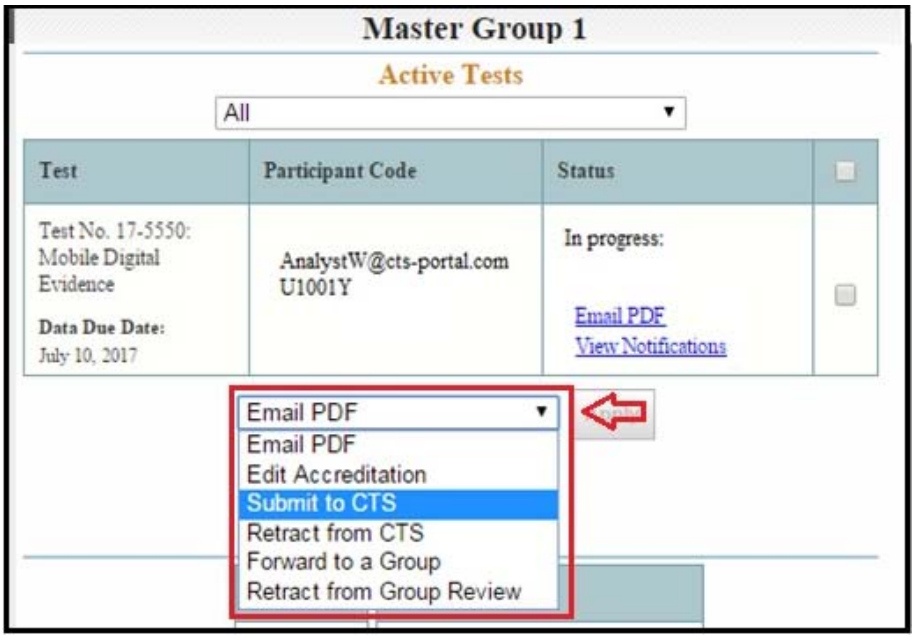


Within the status column, there are two actions that can be performed on each specific test. If you click on "E-mail PDF", you can send a PDF copy of that specific test to any e-mail address. If you click on "View Notifications", a separate page will open that shows all the notifications for that specific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



Bulk Actions

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



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

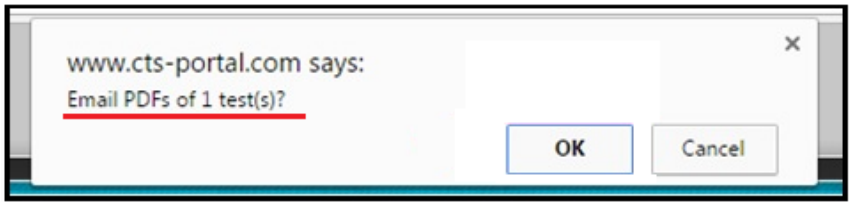
Bulk Actions available:

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

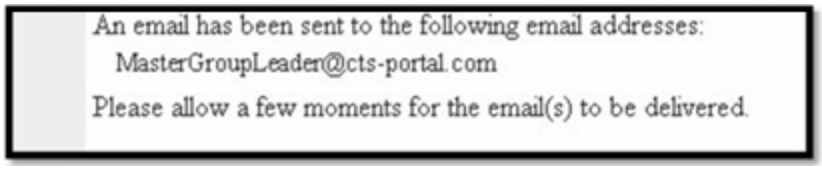
- **Forward to/ Retract From a Group** – Allows user to move a test in or out of a sub-group. These actions are helpful if a test has gotten "stuck" due to a user/reviewer being unavailable. See detailed walkthrough below.

E-mail PDF

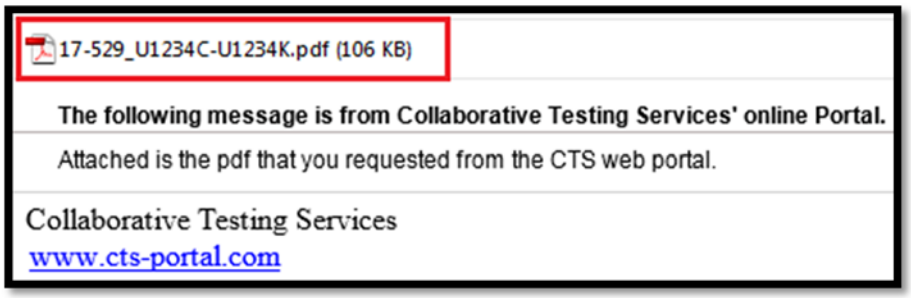
After selecting the E-mail PDF action, a pop up is triggered to confirm the number of tests and the action you wish to perform.



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



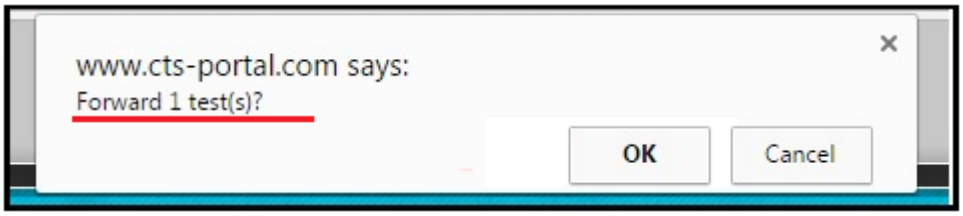
The E-mail will contain one PDF of all selected tests merged into one document.



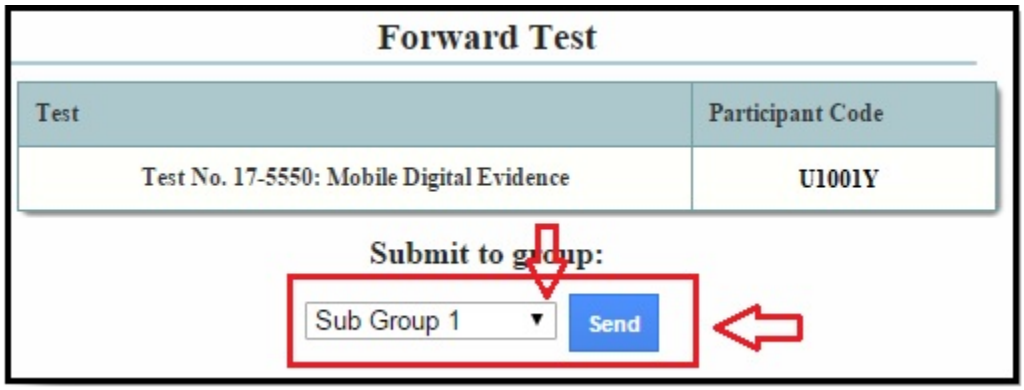
Forward to a Group

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

After selecting the "Forward to a Group" action a pop up is triggered to confirm the number of tests and the action you wish to perform.



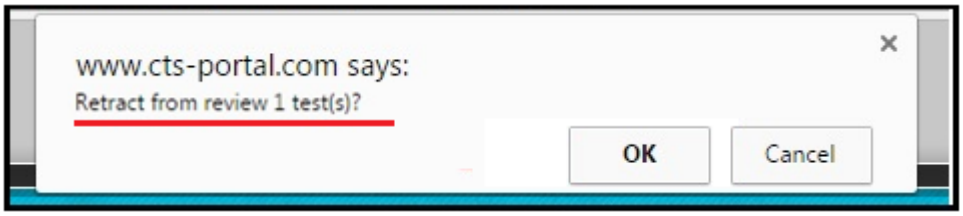
After selecting “OK”, the Forward Test page will open, showing the selected test(s). Choose the correct sub-group from the drop down list, then click on the "Send" button



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.



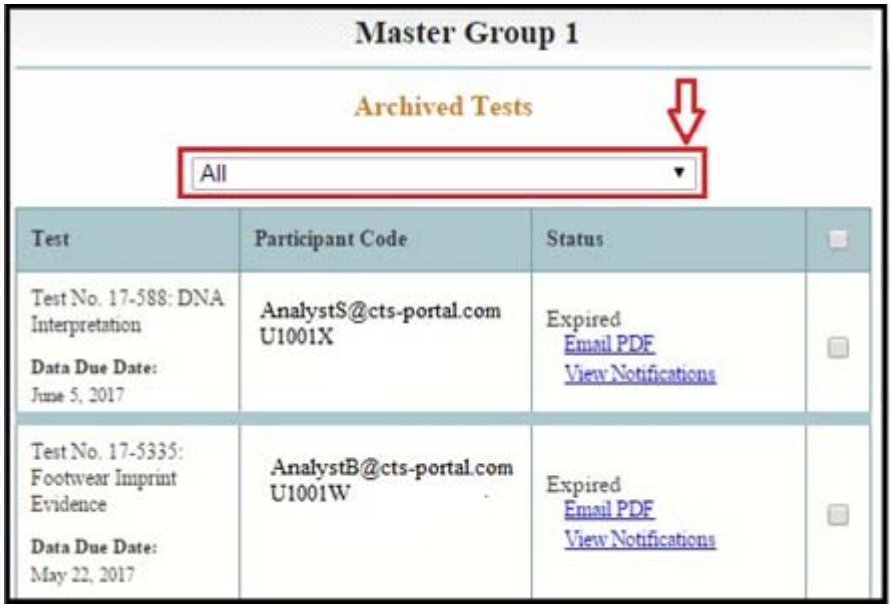
The Master Group Dashboard will refresh once the action has completed and the retracted test(s) will show as “In progress”. The test(s) will need to be resubmitted to CTS prior to the Data Due Date to be included in the final report.

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.



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.