

CTS Portal User Guides

CTS Portal - Industry

2017

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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 in to the site for the first time.

First Time? Register

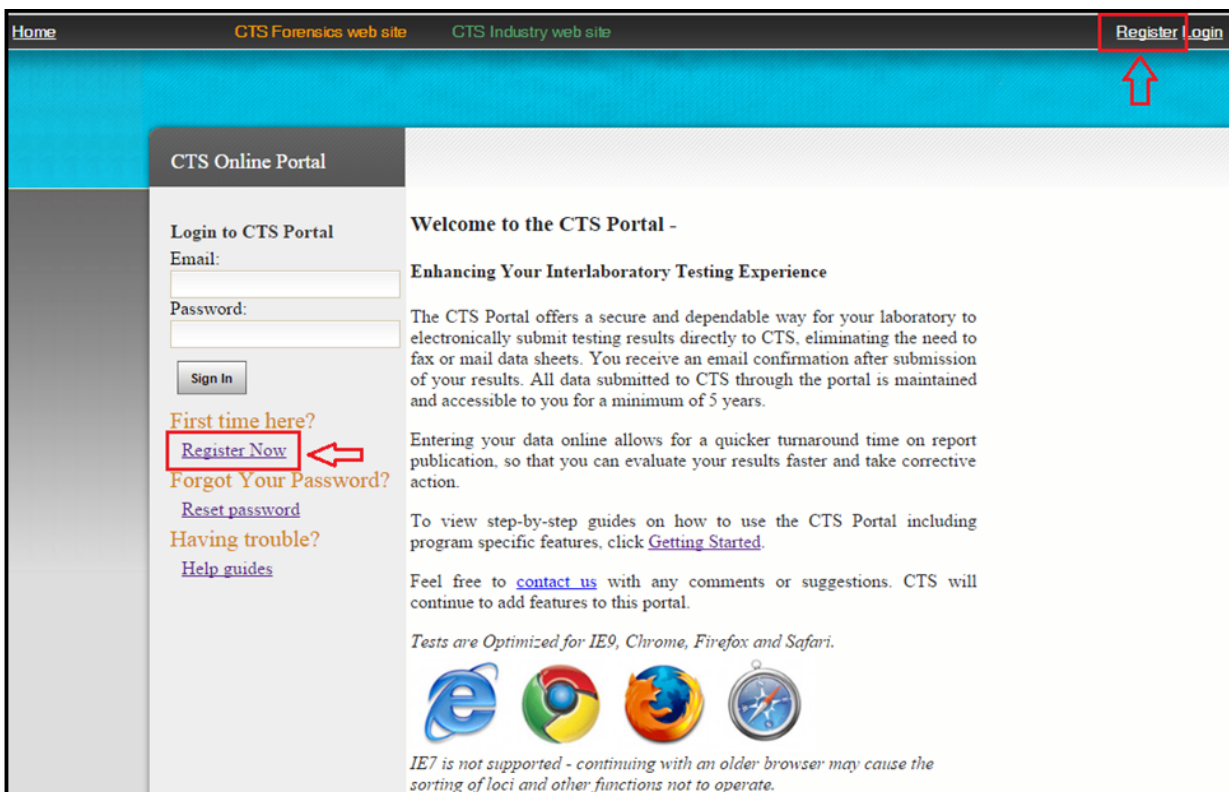
Note: *The first time you sign onto the CTS Portal, you may need to complete registration.*

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 email 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 on 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 email 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:

First time here?
[Register Now](#)

Forgot Your Password?
[Reset password](#)

Having trouble?
[Help guides](#)

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:

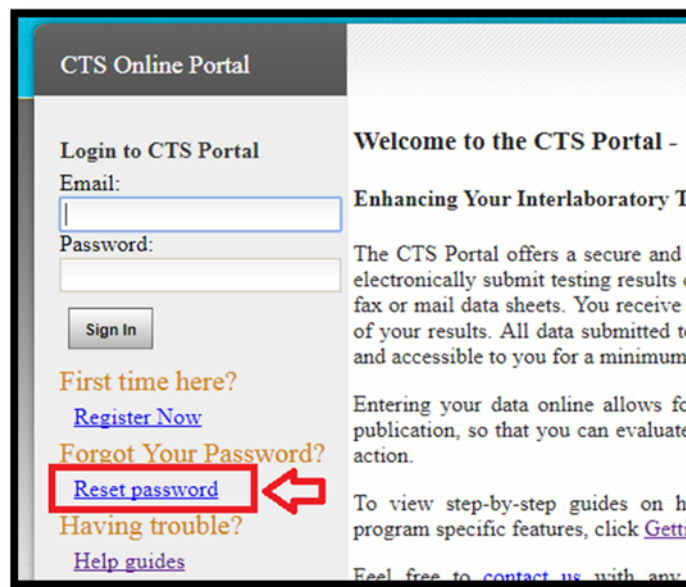
HOW TO RESET OR CHANGE YOUR PASSWORD

This guide walks you through resetting your password.

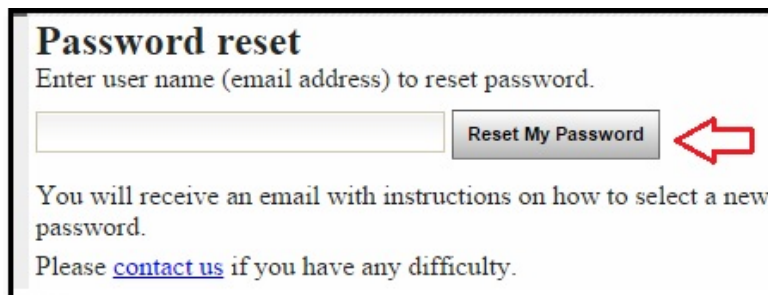
There are two different ways to reset your password, depending on whether you forgot your password and need to reset it to sign in to the Portal, or if you are already signed in and would like to change your password.

Reset Forgotten Password:

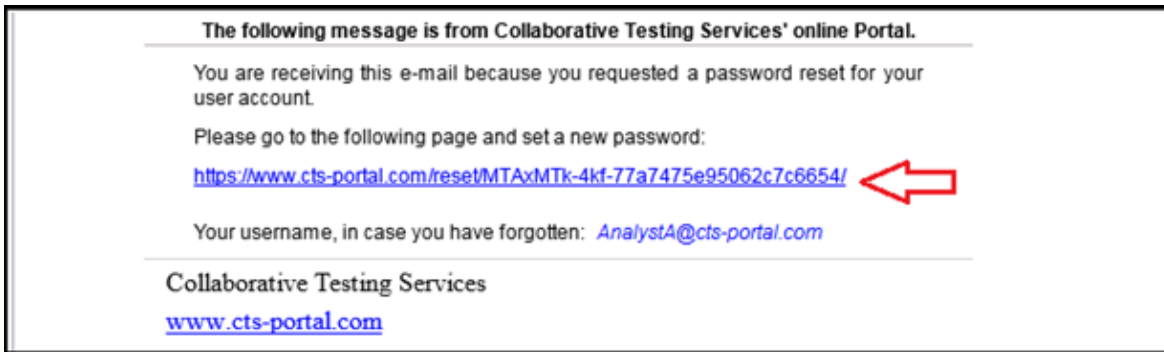
Click on “Reset password”, below the "Forgot Your Password?" heading on the left side, below the log-in field.



Type in your email 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.

New password:

Confirm password:

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 SET TESTING PROGRAM VISIBILITY

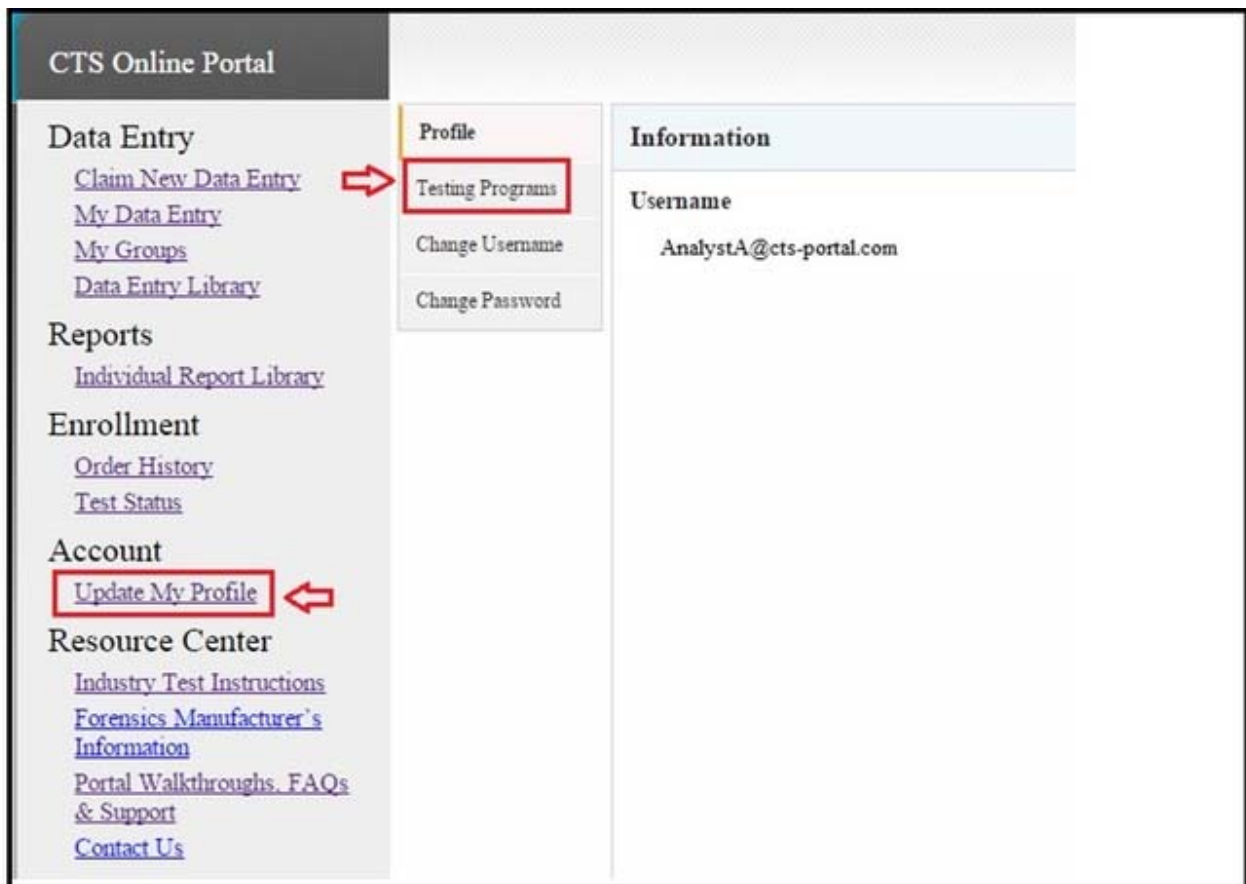
This guide walks you through setting which program's cycles will be displayed within the "Claim New Data Entry" section.

At the time of registration all programs under your selected department are visible to you by default. The selection of the "Industry" department allows for the following programs to be visible: the Agricultural Laboratory Program, Color and Appearance, Containerboard, Metals, Paper, Plastics, Rubber, and Wine.

To change which programs you can see in the "Claim New Data Entry" section of the CTS Portal, follow the below guide.

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

Click on "Testing Programs".



All available programs will be displayed. Any program that has a checkmark next to it will be displayed when you are on the "Claim New Data Entry" page. Click the box next to a program to make a checkmark either appear or disappear.

Once all necessary programs are checked, click on the "Change Visibility" button to save your changes.

| Program Name | Visible |
|---------------------------------|-------------------------------------|
| Forensics | <input checked="" type="checkbox"/> |
| Industry | All |
| Agricultural Laboratory Program | <input checked="" type="checkbox"/> |
| Color and Appearance | <input checked="" type="checkbox"/> |
| Containerboard | <input checked="" type="checkbox"/> |
| Metals | <input checked="" type="checkbox"/> |
| Paper | <input checked="" type="checkbox"/> |
| Plastics | <input checked="" type="checkbox"/> |
| Rubber | <input checked="" type="checkbox"/> |
| Wine | <input checked="" type="checkbox"/> |

The screen shown below is an example of what the "Claim New Data Entry" dropdown list would look like based on selecting the Containerboard and Paper programs for program visibility.

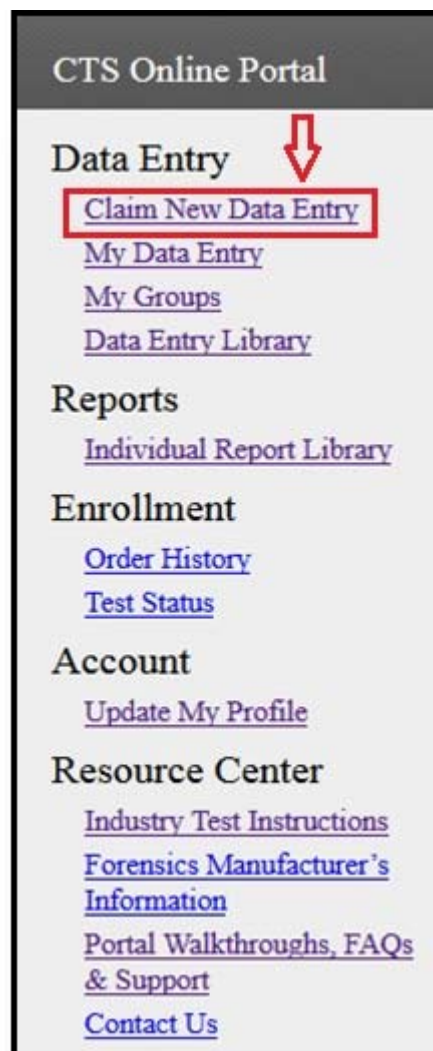
| | |
|----------|----------------|
| Program | Containerboard |
| Cycle | Containerboard |
| Lab Code | Paper |

HOW TO ADD YOUR CYCLE TO YOUR ACCOUNT AND CLAIM FOR A GROUP

This guide walks you through adding your testing cycle and related test(s) to your account and your group. This guide will also explain how to share a claimed cycle with a group. When a cycle has been shared with a group, all users can access the tests within that cycle based on their permissions.

To Add a Cycle To Your Account:

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



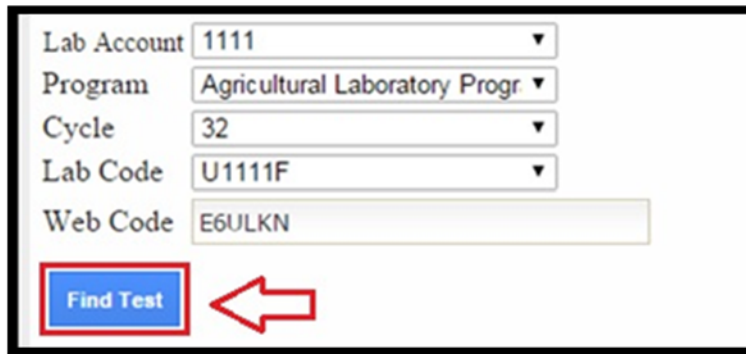
Choose the correct program from the drop down list.

Note: *If the program that you want is not showing, there may be no active cycles for that program and/or for your laboratory. Less commonly your personal program visibility may be set to exclude the desired program. The instructions on how to verify or change program visibility are found here: “[How to Set Testing Program Visibility](#)”.*

Select the proper cycle from the drop down list and type your Lab Code and Web Code in the proper boxes.

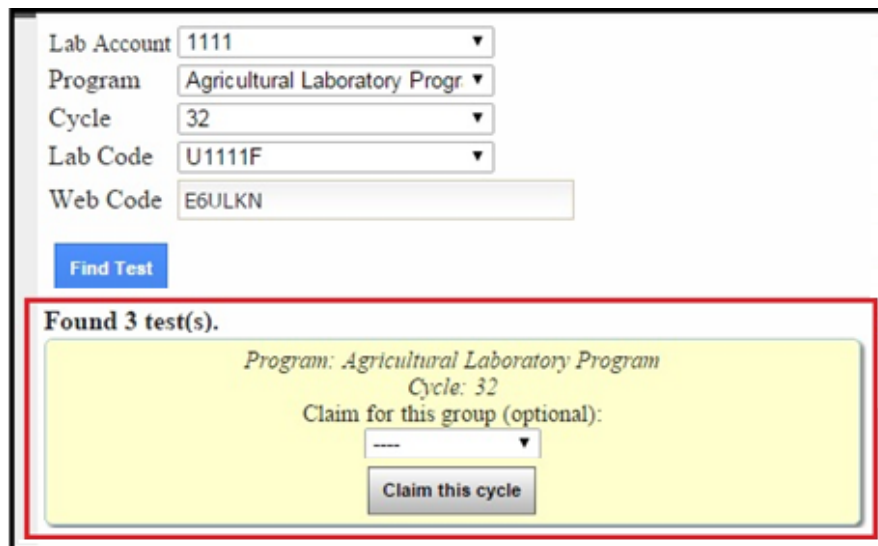
Note: *If you have access to the preloaded testing codes, you will only need to select the appropriate Lab Code and the Web Code will fill in automatically.*

Once all information has been selected and entered, click on the "Find Test" button.



A screenshot of a web form with the following fields: Lab Account (1111), Program (Agricultural Laboratory Progr), Cycle (32), Lab Code (U1111F), and Web Code (E6ULK). A blue button labeled "Find Test" is at the bottom left, with a red arrow pointing to it from the right.

A box will appear below the Find Test button, indicating the number of tests included within the selected cycle.



A screenshot showing the search results below the "Find Test" button. A yellow box contains the text: "Found 3 test(s). Program: Agricultural Laboratory Program Cycle: 32 Claim for this group (optional):" followed by a dropdown menu and a "Claim this cycle" button.

Claim Cycle for a Group Option:

If you would like to share a cycle with one of your groups (this will add the test entry forms to the My Data Entry section for all users in the selected group), select the group from the drop down list. If you do not want to share the cycle with a group, or if you do not have any available groups, skip this step.

Lab Account: 1111
Program: Agricultural Laboratory Progr
Cycle: 32
Lab Code: U1111F
Web Code: E6ULKLN

Find Test

Found 3 test(s).

Program: Agricultural Laboratory Program
Cycle: 32

Claim for this group (optional):
TestGroup456

Click on the "Claim this cycle" button to claim all the test(s) within the cycle.

Lab Account: 1111
Program: Agricultural Laboratory Progr
Cycle: 32
Lab Code: U1111F
Web Code: E6ULKLN

Find Test

Found 3 test(s).

Program: Agricultural Laboratory Program
Cycle: 32

Claim for this group (optional):
TestGroup456

Claim this cycle

You will be taken to the My Tests page and the Cycle header and all tests will be listed.

Agricultural Laboratory Program, cycle 32 has been added to your profile.
User: AnalystA@cts-portal.com

My Data Entry // 2017

Active Data Entry:

Cycle: 32 Data Due Date: April 28, 2017, 11:59 p.m.
Lab Code: U1111K
[Email Cycle PDF](#)

| Test Name | Actions |
|--------------------------------|--|
| Test 801: Soil Properties | <input type="button" value="Open Test"/> |
| Test 802: Botanical Properties | <input type="button" value="Open Test"/> |
| Test 803: Water Properties | <input type="button" value="Open Test"/> |

If No Tests are Found, Confirm the Following:

Lab Account 1111
Program Agricultural Laboratory Progr
Cycle 32
Lab Code
Web Code

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. |
|----------------|------------------------------------|---|
| Containerboard | Cycle 569, B, February 2017 | March 06 2017 |
| Forensics | Test No. 17-5701: Forensic Biology | March 06 2017 |
| Rubber | Cycle 191, 1st Qtr 2017 | March 13 2017 |

[Contact us](#) for any questions.

- You have entered the correct Lab Code and Web Code for your cycle.
- The data due date for the cycle has not passed.
- You are the only one assigned to this Lab Code and Web Code. **Note:** *The Lab Account Owner can check to see if another user has claimed the cycle using the Data Entry Library and navigating to the cycle in question.*

If you are still unable to locate your cycle, or if another user has accidentally claimed your cycle, please contact CTS.

How to Share a Claimed Cycle with a Group:

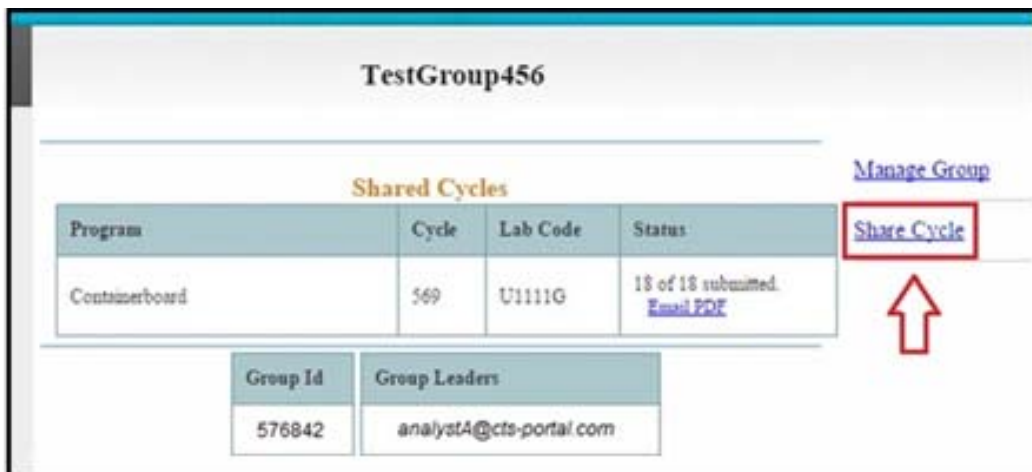
If you have already claimed a cycle, but would like to share it with your group, follow the instructions below.

Note: This can only be done by the user who originally claimed the cycle.

Click on "My Groups" and then "Dashboard" under the group you would like to share the cycle with.



Click on "Share Cycle" on the right side of the Group dashboard window.



Select the cycle from the drop down list, then click on the "Share" button.

Industry Group A

Share a cycle with the group by selecting it below.

Active Cycles Inactive Cycles

Cycle:
Cycle 32, Lab Code U1111F of program Agricultural Laboratory Program ▾

Share

You will receive a confirmation message indicating that the cycle has been shared with the group.

Industry Group A

Cycle 32, Lab Code U1111F of program Agricultural Laboratory Program has been shared with the group.

Share a cycle with the group by selecting it below.

Active Cycles Inactive Cycles

Cycle:
Cycle 180, Lab Code U1111E of program Color and Appearance ▾


Share

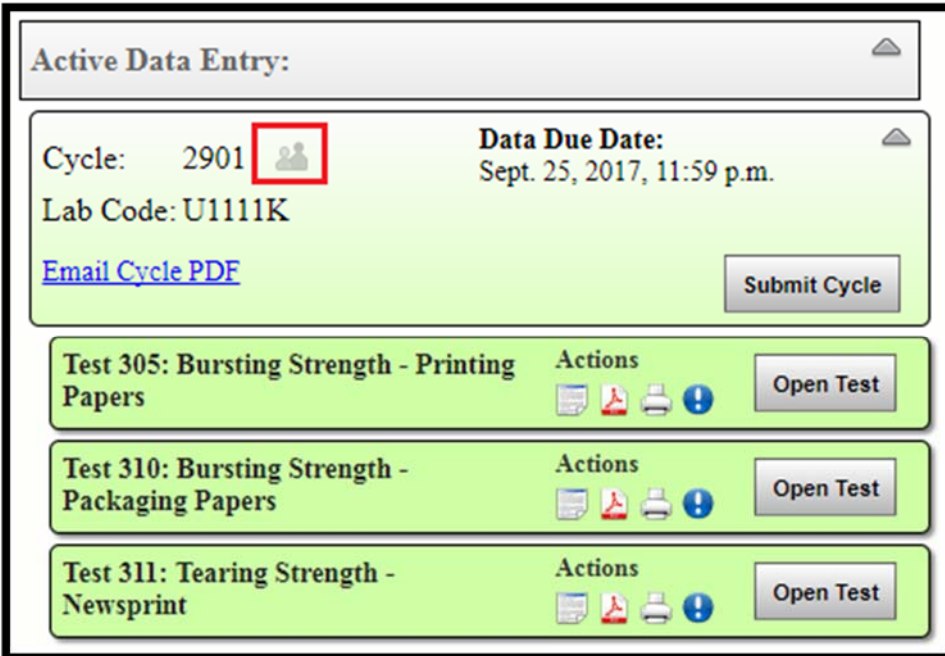
HOW TO ENTER DATA


This guide walks you through entering data in the CTS Portal. For specific instructions on completing CTS testing in your laboratory, please refer to the Industry Program Testing Instructions located within the [CTS Portal Resource Center](#).



All your active cycles and tests will appear in the Active Data Entry section on the "My Data Entry" page.

Data Entry is sorted by Cycle and Lab Code. Click the gray arrow on the far right hand corner to expand or minimize the cycle groups.

Note: Any test that is part of a group is marked by the following symbol next to the Cycle: 



Active Data Entry: 

Cycle: 2901  Data Due Date: Sept. 25, 2017, 11:59 p.m. 

Lab Code: U1111K

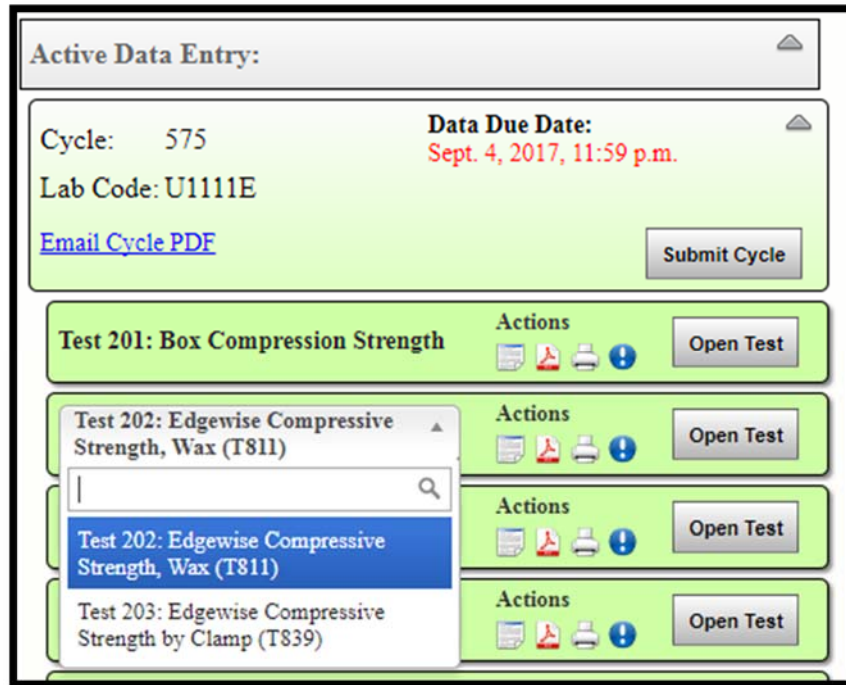
[Email Cycle PDF](#)

Test 305: Bursting Strength - Printing Papers Actions

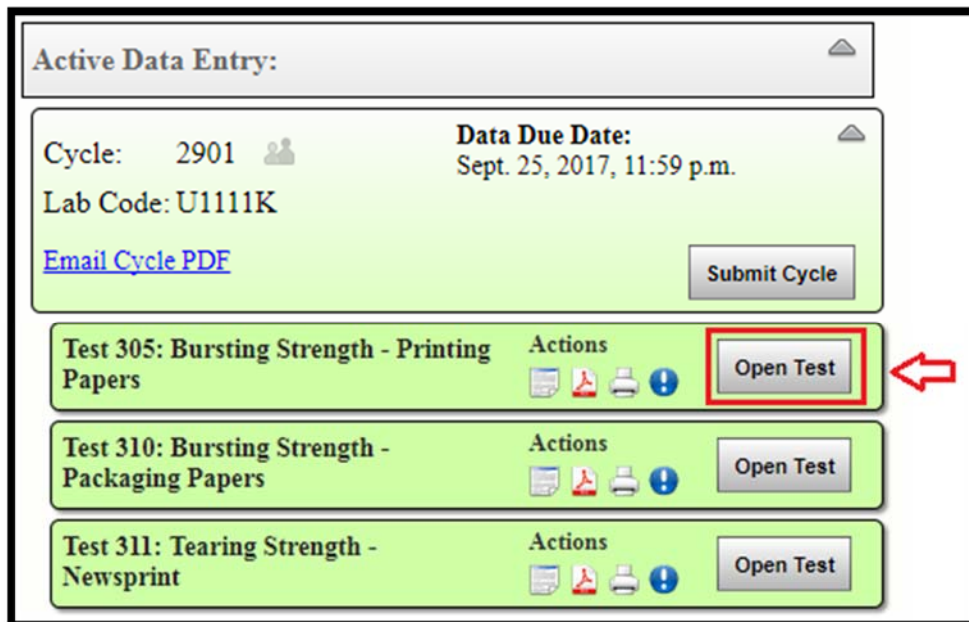
Test 310: Bursting Strength - Packaging Papers Actions

Test 311: Tearing Strength - Newsprint Actions

If there is more than one test in a series, click on the arrow next to the test to display the drop down list of available tests in the series.



To open the test you want to complete, click the "Open Test" button.



The test response form will open and the top of the page for all tests shows the following actions:



Help Link - will take you directly to the help guide.

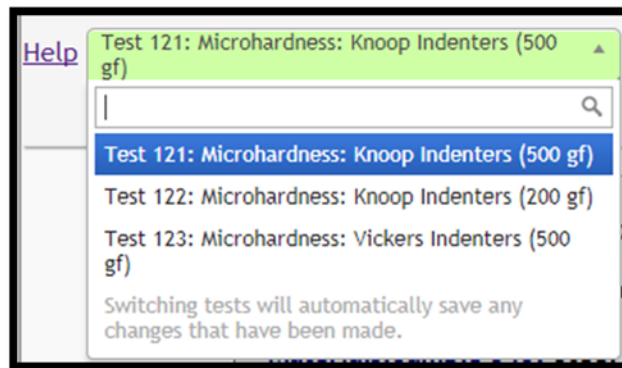
Save - will save the tests but keep the test response form open.

Save & Close - will save the test, close the test response form, and return to the My Tests page.

Submit only this Test Series - will submit all tests within a test series (single or multiple tests) to CTS. If you do not have permissions to submit a test, this will not be an available option.



Test Drop Down list (will only appear if there is more than one test in a series) - This drop down box allows the user to move to another test within the series without having to leave the entry form.



Previous and Next links are also available at the bottom of the response form for navigation.



Each Test response form is different based on the test and type of test. Two examples are shown below.

Example of a Single Test Entry

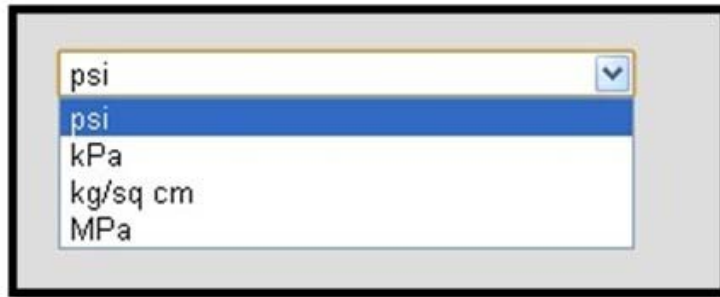
The screenshot shows a web-based data entry form for a 'Box Compression Strength' test. At the top, there are 'Save' and 'Save & Close' buttons, and a 'Submit only this Test Series' button. A message states 'Saving does not submit data to CTS.' and 'Submit full Cycle through My Data Entry page.' The form title is 'CTS-Containerboard Collaborative Reference Program'. Test details include Cycle: 575, Test: 201, Lab Code: U1111E, Web Code: BTN288, and Month: August 2017. A deadline note says 'Data must be received by Sept. 4, 2017, 11:59 p.m. to be included in the report.' Below this, there are dropdown menus for 'Units' (set to 'lbf'), 'Conditions' (set to 'Select sealing method from list'), and 'Instrument' (set to 'Instrument make/model not specified'). A section for 'Use Sample Pack: BX' contains a table with 5 rows and 1 column, with 'BX11' in the first row. Below the table is an 'Average' field with the value '0.00'. A note says 'Please use the calculated average to confirm your data entry.' There are radio buttons for 'Were TAPPI Std Conditions (48-52% RH; 22-24C) used?' with 'No' selected. At the bottom, there are input fields for 'Instrument (if not listed above)', 'Variations from specified procedure:', 'Analyst:', and 'Date:'.

Example of a Single Test within a Multi-Test Series

The screenshot shows a web-based data entry form for a 'Microhardness: Knoop Indenters (500 gf)' test. At the top, there are 'Save' and 'Save & Close' buttons, and a 'Submit only this Test Series' button. A message states 'Saving does not submit data to CTS.' and 'Submit full Cycle through My Data Entry page.' The form title is 'CTS-Interlaboratory Program for Fasteners and Metals'. Test details include Cycle: 119, Test: 121, Lab Code: U1111B, and Web Code: RB6Y4P. A deadline note says 'Data must be received by Sept. 25, 2017, 11:59 p.m. to be included in the report.' Below this, there are dropdown menus for 'Units' (set to 'HK') and 'Instrument' (set to 'Instrument make/model not specified'). A section for 'Use Sample Pack: PS' contains a table with 5 rows and 2 columns, with 'S45' and 'S46' in the first row. Below the table is an 'Average' field with the value '0.000'. A note says 'Please use the calculated average to confirm your data entry.' There is an input field for 'Variations from specified procedure:'. At the bottom, there are input fields for 'Analyst:' and 'Date:', and a 'Next' button.

There are three basic ways to enter information:

Drop Down Lists - select the appropriate answer from the drop down list.



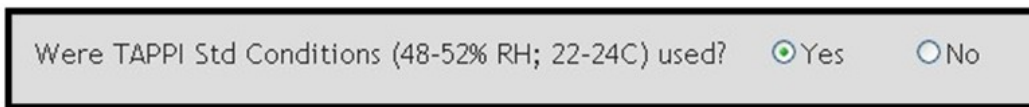
A screenshot of a web form showing a drop-down menu. The menu is open, displaying a list of pressure units: 'psi', 'kPa', 'kg/sq cm', and 'MPa'. The 'psi' option is currently selected and highlighted in blue. The text 'psi' is also visible in the input field above the list.

Entry Boxes - key in the proper answer.



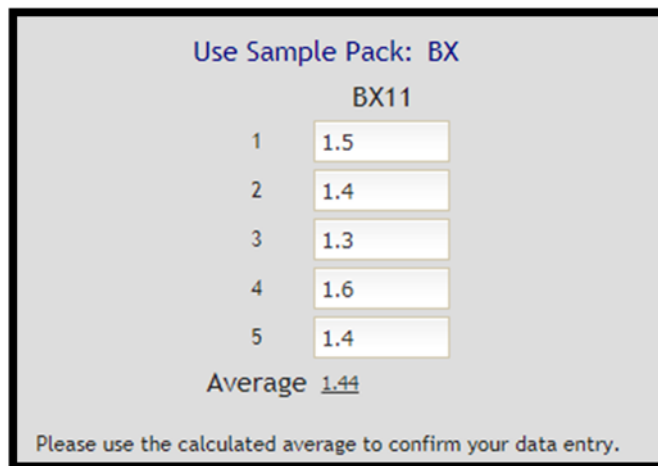
A screenshot of a form with two input fields. The first field is labeled 'Instrument (if not listed above):' and is empty. The second field is labeled 'Variations from specified procedure:' and contains the text 'Type in answer in box like this'.

Select Circles - click on the appropriate circle to select the appropriate answer. The circle will be filled in once selected.



A screenshot of a form with a question: 'Were TAPPI Std Conditions (48-52% RH; 22-24C) used?'. There are two radio buttons: 'Yes' (which is selected) and 'No'.

Within the results entry section of most response forms, an average has been generated at the bottom of the column of data. This will give you an average of the amounts in the column to help you double check and feel confident in your data entry.



A screenshot of a data entry form. It shows a table with 5 rows of data for 'Use Sample Pack: BX' and 'BX11'. The values are 1.5, 1.4, 1.3, 1.6, and 1.4. Below the table, the average is calculated as 1.44. A note at the bottom says 'Please use the calculated average to confirm your data entry.'

| | Use Sample Pack: BX |
|---------------------|---------------------|
| | BX11 |
| 1 | 1.5 |
| 2 | 1.4 |
| 3 | 1.3 |
| 4 | 1.6 |
| 5 | 1.4 |
| Average <u>1.44</u> | |

Please use the calculated average to confirm your data entry.

Some programs require testing to occur over a series of weeks, for these programs you will see each week on the same response form page. Complete responses for all weeks before submitting the test to CTS.

| | Week 1 | | Week 2 | | Week 3 | | Week 4 | |
|----------|---------|----------------------|---------|----------------------|---------|----------------------|---------|----------------------|
| | 4283 | | 4283 | | 4283 | | 4283 | |
| Sheet #1 | 1 | <input type="text"/> | 1 | <input type="text"/> | 1 | <input type="text"/> | 1 | <input type="text"/> |
| | 2 | <input type="text"/> | 2 | <input type="text"/> | 2 | <input type="text"/> | 2 | <input type="text"/> |
| Sheet #2 | 3 | <input type="text"/> | 3 | <input type="text"/> | 3 | <input type="text"/> | 3 | <input type="text"/> |
| | 4 | <input type="text"/> | 4 | <input type="text"/> | 4 | <input type="text"/> | 4 | <input type="text"/> |
| Sheet #3 | 5 | <input type="text"/> | 5 | <input type="text"/> | 5 | <input type="text"/> | 5 | <input type="text"/> |
| | 6 | <input type="text"/> | 6 | <input type="text"/> | 6 | <input type="text"/> | 6 | <input type="text"/> |
| Sheet #4 | 7 | <input type="text"/> | 7 | <input type="text"/> | 7 | <input type="text"/> | 7 | <input type="text"/> |
| | 8 | <input type="text"/> | 8 | <input type="text"/> | 8 | <input type="text"/> | 8 | <input type="text"/> |
| Sheet #5 | 9 | <input type="text"/> | 9 | <input type="text"/> | 9 | <input type="text"/> | 9 | <input type="text"/> |
| | 10 | <input type="text"/> | 10 | <input type="text"/> | 10 | <input type="text"/> | 10 | <input type="text"/> |
| | Average | 0.00 | Average | 0.00 | Average | 0.00 | Average | 0.00 |

Please use the calculated average to confirm your data entry.

Once you are done with the test, you may click on “Save and Close” to close the test. To submit the tests, follow these guides: [“How to Submit an Individual Test Series”](#) or [“How to Submit or Retract an Entire Cycle”](#).

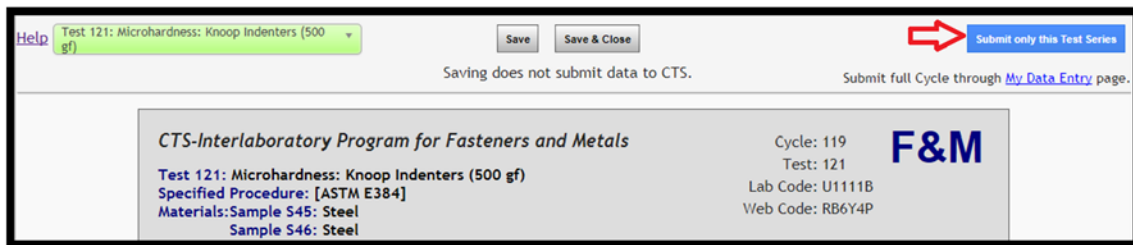
HOW TO SUBMIT AN INDIVIDUAL TEST SERIES

This guide explains how to submit an individual test series to CTS.

To Submit a Test:

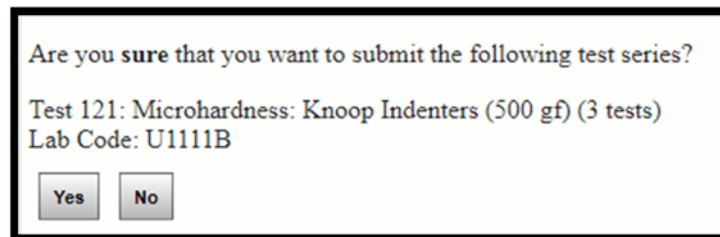
To submit your test to CTS, open your test. Click on the “Submit only this Test Series” button.

Note: *If there is more than one test in a series, all tests in the series will be submitted. Do not submit a test in a series unless they are all complete.*



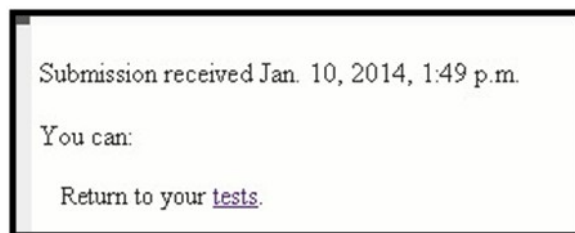
A confirmation page will open that lists the test(s) you are submitting. If there is more than one test, it will indicate the number of tests.

Click on the "Yes" button to complete the submission. If you do not want to submit the test(s), click on the "No" button.



Another confirmation page will open, indicating that the test has been received by CTS. The date and time of the submission will be included. You will receive a PDF copy of your submission via e-mail that also reflects the date and time of the submission.

Click on the "tests" link to go back to the My Data Entry page.



The user who originally claimed the Cycle will receive an e-mail confirmation along with a PDF copy of the submission.

Your Submitted test(s) will no longer be listed under the Active Data Entry section. They will be moved to the Submitted Data Entry section.

Submitted Data Entry: ←

Cycle: 569 Data Due Date: March 6, 2017, 11:59 p.m.
Lab Code: U1111G

[Email Cycle PDF](#)

Test 201: Box Compression Strength Actions

Test 202: Edgewise Compressive Strength, Wax (T811) Actions

Test 205: Mullen Burst of Linerboard Actions

Test 215: Ring Crush of Linerboard, Rigid Platen Type Actions

Test 223: STFI of Linerboard Actions

Test 228: Roughness - Stylus Method Actions

Note: While you can submit a test series independently from a cycle, you cannot retract it independently. If a submitted test needs to be modified, the retraction process will reactivate all tests previously submitted and they will all need to be resubmitted to be included in the final report.

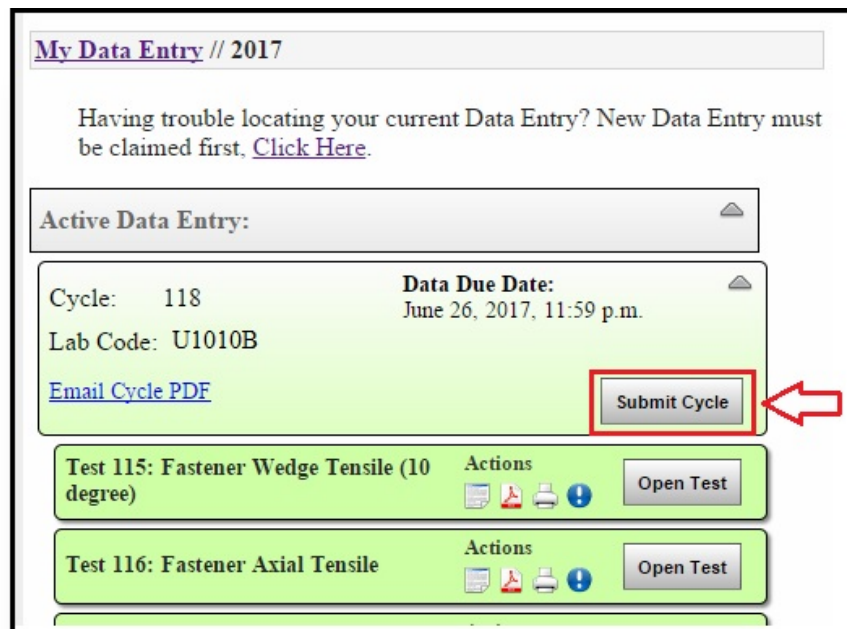
HOW TO SUBMIT OR RETRACT AN ENTIRE CYCLE

This guide explains how to submit an entire cycle of tests. It also explains how to retract the submitted cycle.

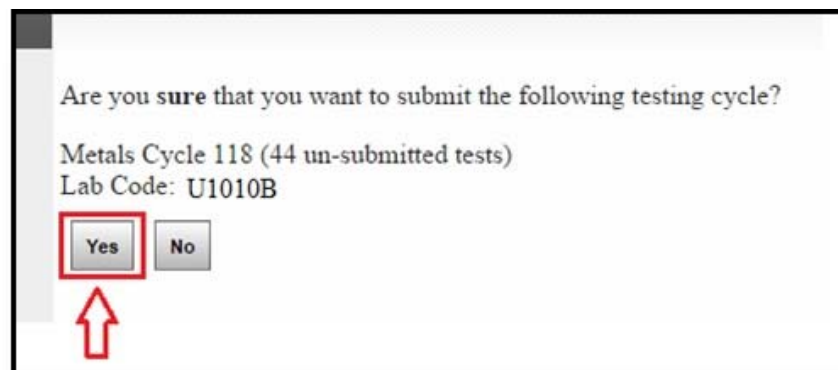
How to Submit an Entire Cycle:

Once all the tests have been completed in the cycle and you are ready to submit, click the "Submit Cycle" button next to the Cycle/Lab Code in the top section of the active cycle.

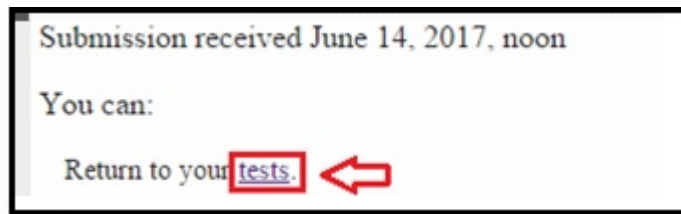
Note: If the "Submit Cycle" button is inactive, your permission to submit has been turned off within your Group. Ask the group manager to give you permission.



A confirmation message page will open. Click "Yes" to submit the cycle.



A page will open that indicates that your cycle has been submitted. Click on "tests" to go back to the My Data Entry page.



The user who originally claimed the Cycle will receive an e-mail confirmation along with a PDF copy of the submission.

Your cycle and tests are now located under the Submitted Data Entry section.

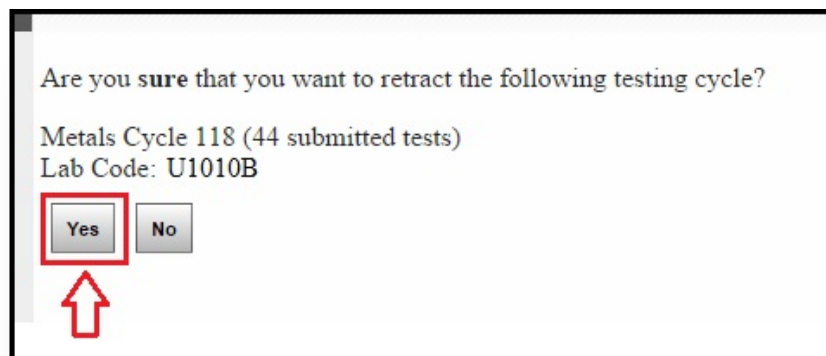
How to Retract an Entire Cycle:

To retract a cycle of tests you have submitted, click on the "Retract Cycle" button.

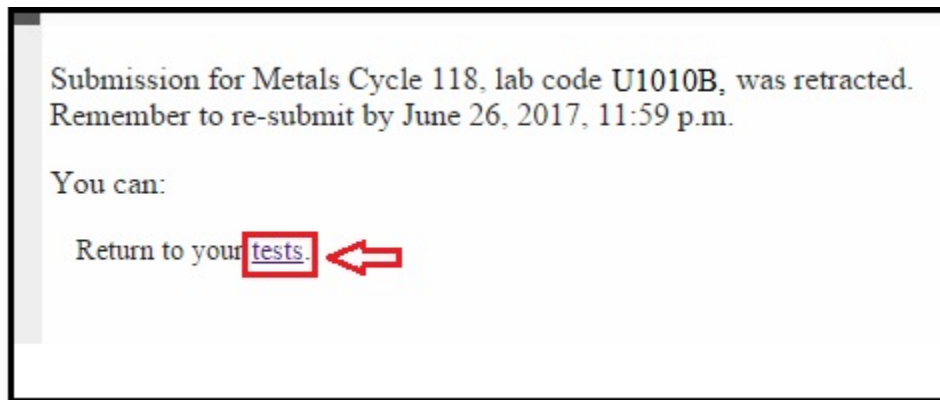
Note: *If the "Retract Cycle" button is inactive, your permission to retract has been turned off within your Group. Ask the group manager to give you permission.*



A confirmation page will open. Click "Yes" to retract the cycle.



A message page will open indicating that the cycle has been retracted. Click on "tests" to go back to the My Data Entry page.



The user who originally claimed the Cycle will receive an e-mail confirming the retracted cycle.

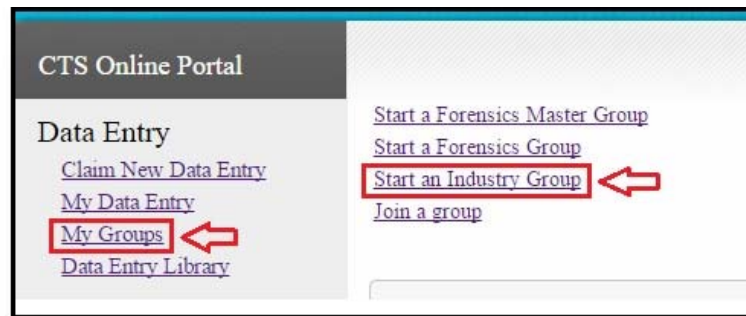
Remember: You will need to re-submit your test before the due date.

HOW TO START A GROUP FOR INDUSTRY PROGRAMS

This guide will explain how to start a group for Industry Programs: ALP, Color, Containerboard, Metals, Paper, Plastics, Rubber or Wine.

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

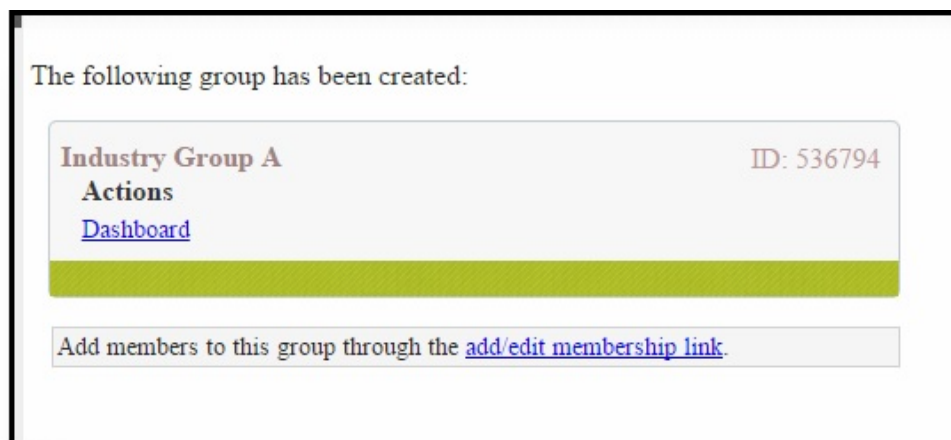
Then click on "Start an Industry Group".



Type in a user-defined group name in the box. "Industry Group A" is used in the example below. Finally, click on the "Create Group" button.



The following screen will appear to confirm that the group has been created and the group will be shown on the "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.

Option One: Group Manager Adds User(s)

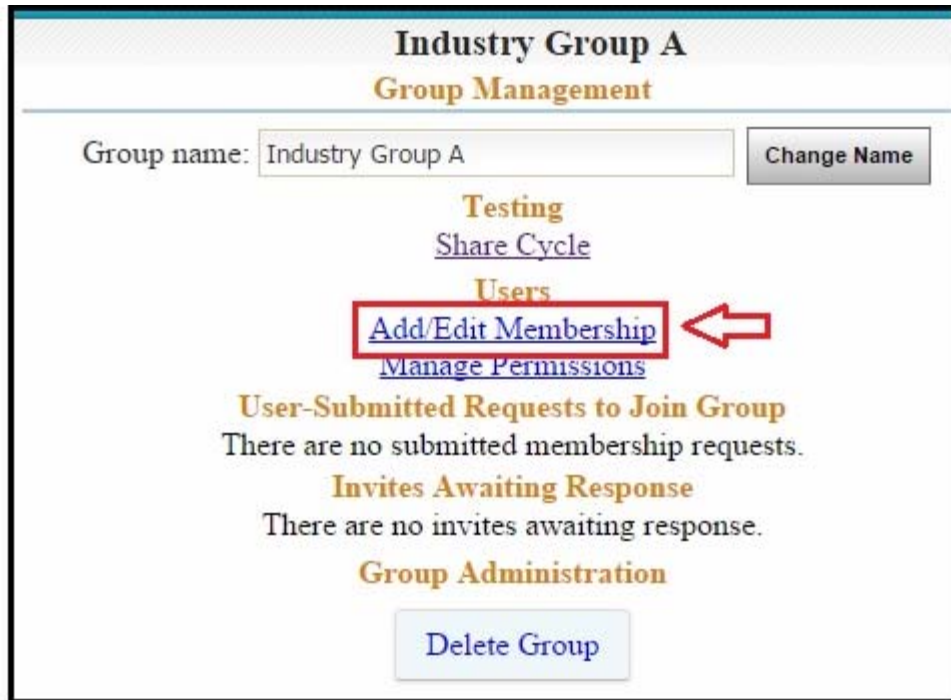
Click on "My Groups", then click on "Dashboard" under the Group that you want to add users to.



Click on "Manage Group" on the right hand side of the dashboard.



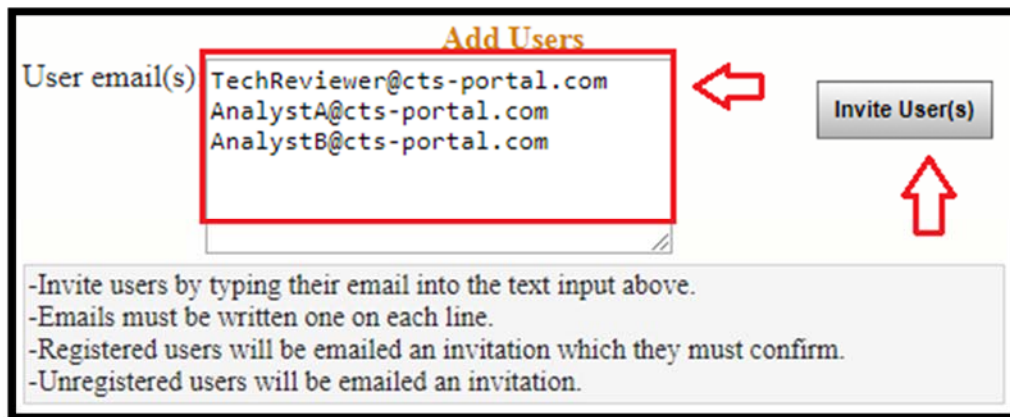
The Manage Group page will open. Click on "Add/Edit Membership".



The Add/Edit Membership page will open.

In the Add Users section, type user e-mail addresses that you would like to add into the box. You can add as many users as necessary. Enter each e-mail address on a separate line in the box.

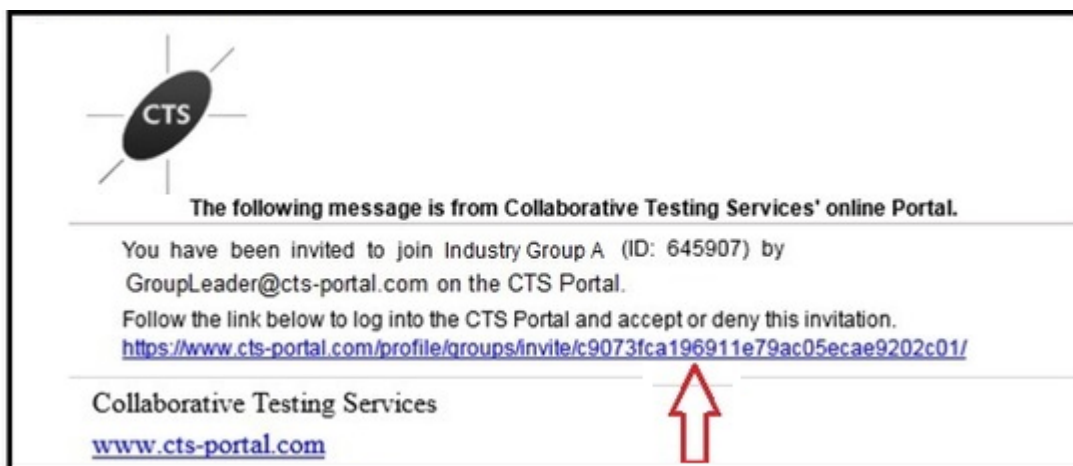
Once all users have been added, click on the "Invite User(s)" button.



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



Each user will receive an email. If the user is registered, they will receive an email like the one shown below. The user should click on the link that is indicated by the arrow below.

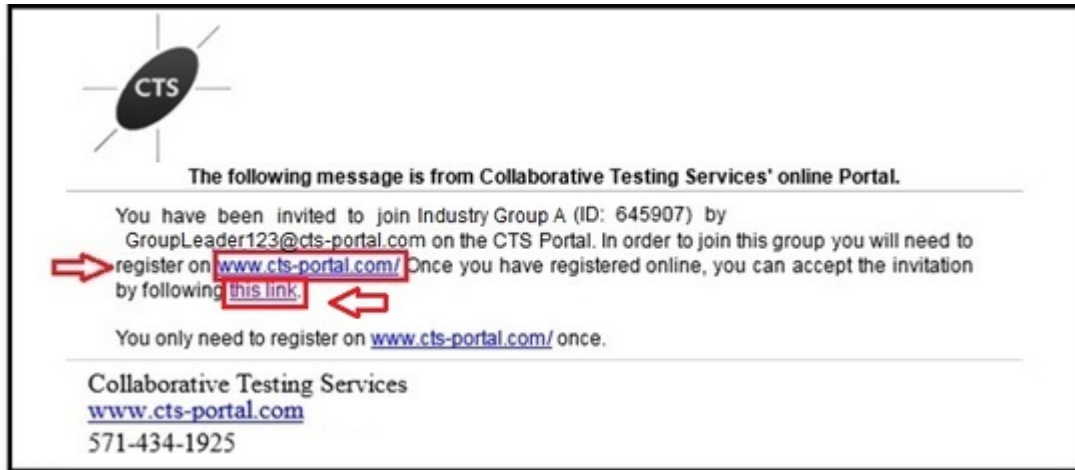


The link will take the user to the CTS Portal where the user will see an option to accept or deny the invitation. To accept the invitation and join the group, click on the "Accept" button.



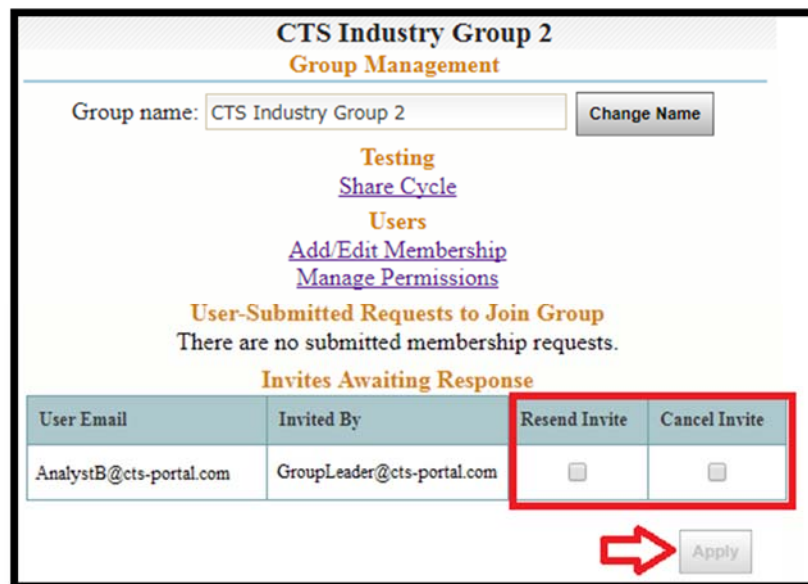
If a user is not registered, the user will receive an e-mail stating they have been invited to join a group and providing a link to register on the Portal.

The user must first click on the portal name 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.

Industry Group A

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 **Remove User(s)**

| 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"/> |

-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 **Remove User(s)**

| 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"/> |

-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.

Option Two: User Joins Group Themselves

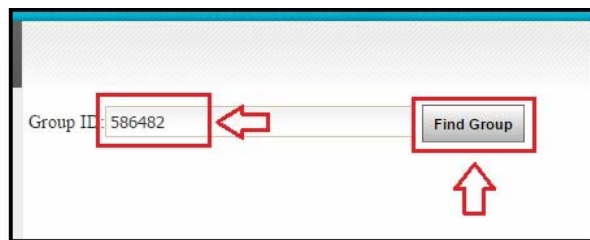
An ID number is located to the right of the Group Name. This is needed by a user to join the group. Give this Group ID number to any user(s) who should join the group.



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 “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.

CTS Industry Group 2

Group Management

Group name:

Testing
[Share Cycle](#)

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 INDUSTRY GROUP MEMBERS

This guide explains how to set the permissions for each user of an industry group.

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



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



The Group Management page will open. Click on "Manage Permissions".



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.

| User | Take Group Test | Share Tests with Group | Review Tests | Submit Tests to CTS | Retract Group Test | Invite Members to Group | Receive Emails Regarding This Group |
|-------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Group Managers | | | | | | | |
| AnalystA@cts-portal.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Group Users | | | | | | | |
| Check/Uncheck All | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| AnalystB@cts-portal.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| AnalystE@cts-portal.com | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| AnalystU@cts-portal.com | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Actions available by setting permissions:

- **Take Group Tests** - allows user to open the test(s) within a shared cycle and fill in answers.
- **Share Tests with Group** - allows user to share the cycle with the group.
- **Review Tests** - allows user to open the view (read-only) version of the test to review.
- **Submit Tests to CTS** - allows user to submit the full cycle or individual test series to CTS.
- **Retract Group Test** - allows user to retract the full cycle from CTS.
- **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 Emails Regarding This Group** - allows user to receive all emails sent out for this group.

Note: The user who started a group is automatically set as Group Manager. This user has all the permissions. Users within an Industry Group receive the first five permissions by default upon joining.