CTS Portal User Guides

CTS Portal – Lab Account Management

2020

CTS Portal – Lab Account Management

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Overview of Lab Account Management

This guide explains how a Lab Account Owner (Primary Contact) can use the Lab Account Management feature.

The Primary Contact for each laboratory will be assigned ownership of the CTS Portal Lab Account. This is the same person that samples shipments are addressed to and reports are issued to.

An e-mail from CTS will be sent to each Lab Account Owner once the lab account is created by CTS, or when the Primary Contact changes. Any questions on the lab account creation or ownership should be directed to CTS.

Only the Lab Account Owner (Primary Contact) has default access to all portal features including:

Data Entry Library – Direct access to all current and past data entered on the portal.

Individual Report Library – All reports for the laboratory since 2014.

Order History – Test ordering information since 2014.

Renew/Order Tests – Renew/order tests and review quotes.

Test Status – Cycle/Test schedule and shipment tracking information.

Preloaded Participant Codes/WebCodes – Claim or Assign a test without the Data Sheet.

The Lab Account Owner (Primary Contact) can grant access to these features to other users through the Lab Account Management feature on the portal. The following guides "**How to Add Users to Lab Account**" and "**How to Set Permissions for Lab Accounts**" will explain how to add a user to the lab account and how to adjust their permissions so that they may have access to the extended features as referenced above.

The Forensic Program Lab Account Owner and authorized users have the ability to unassign a test claimed or assign in error. The guide "**How to Unassign a Test**" provides the walkthrough for this action. Industry Program Lab Account Owners are encouraged to utilize the "**How to Add a Cycle to Your Account and Claim for a Group**" walkthrough to allow multiple users to access the same cycle.

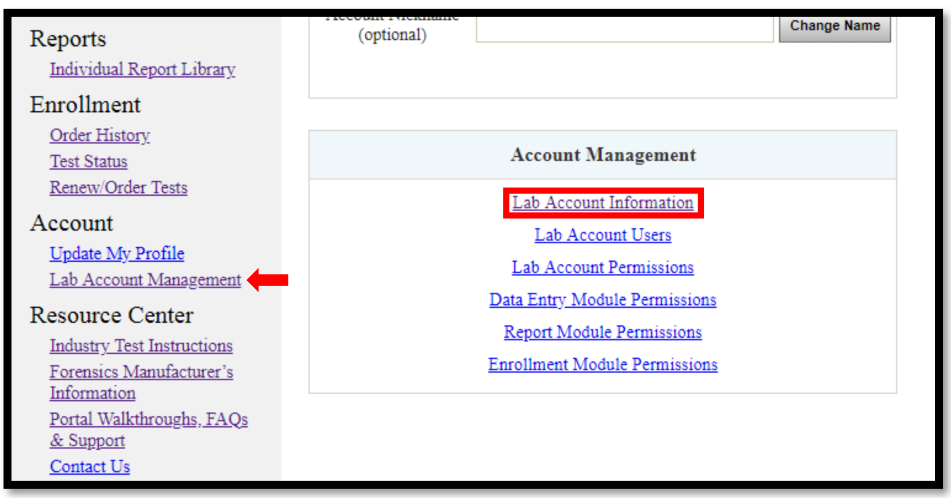
How to Update Lab Account Information

This guide explains how the Lab Account Owner (Primary Contact), or Authorized Users can request updates to their CTS Account Information.

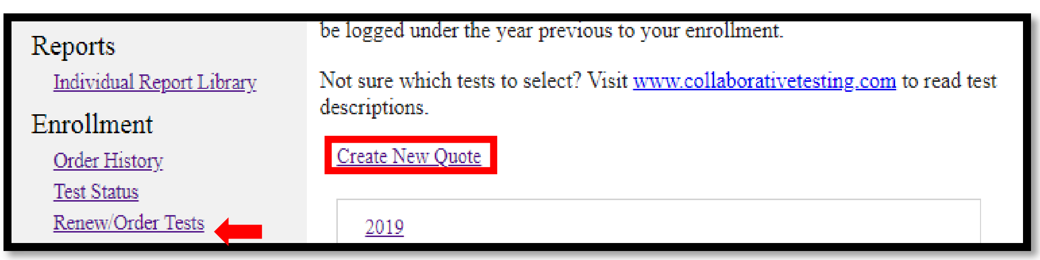
Note: *The Lab Account Owner can set permissions for other Users to view and request updates to lab account information via the "Review/Create Quotes" permission located under "Enrollment Module Permissions" in "Lab Account Management". Refer to the [Enrollment Module Permissions Guide] for further details on how to add a user to a lab account and set permissions.*

You can access your Lab Account Information two ways: through Lab Account Management or before creating a quote.

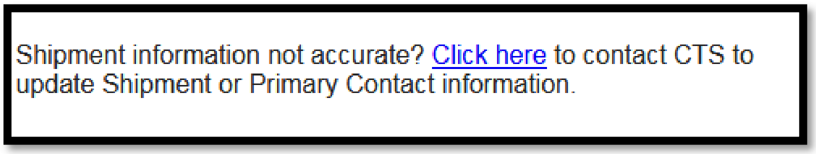
To access the information through Lab Account Management, click the corresponding link under the "Account" heading, then click "Lab Account Information".



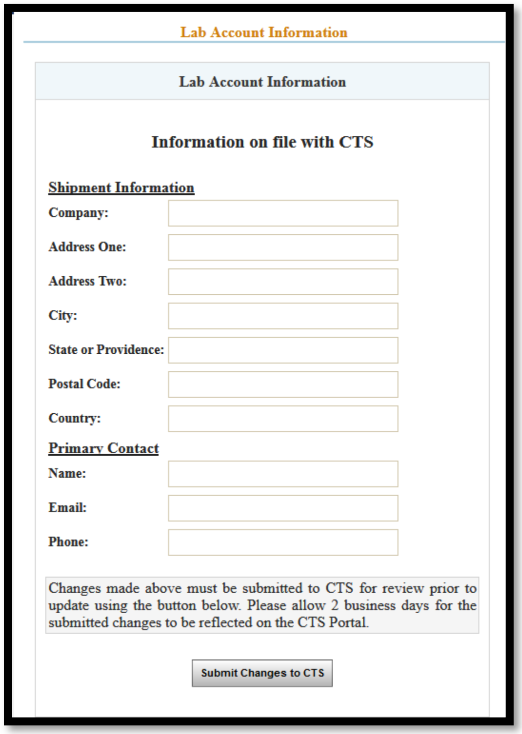
To access the information before creating a quote, click on "Renew/Order Tests" then "Create New Quote".



On the next page, click the link to be taken to your Lab Account Information.



The page will open a form where you can make changes to the shipping address/primary contact info. Once you've input the desired changes, click "Submit Changes to CTS".



Once your changes have been submitted, please allow 2 business days for the changes to be confirmed by CTS. CTS will then alert you that the changes have been made, at which point you may log back into the portal and proceed to create your quote.

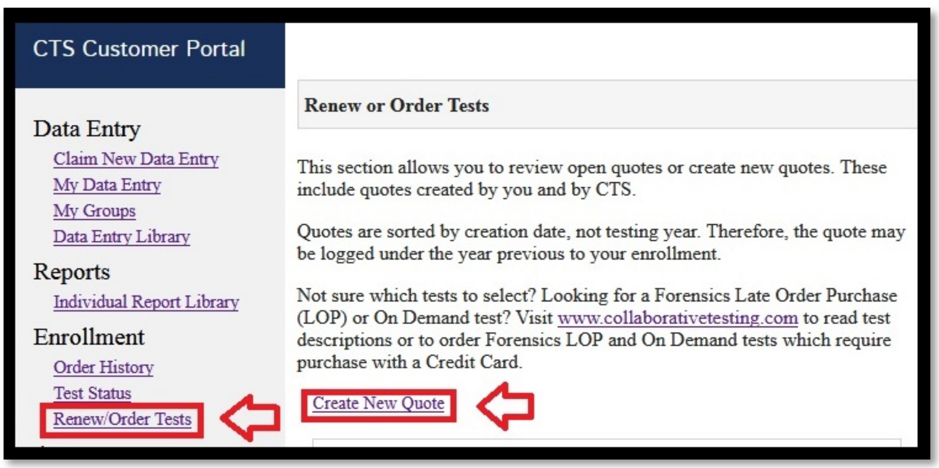
How to Renew and Order Tests

This guide walks the Lab Account Owner (Primary Contact), or authorized user through renewing and ordering tests.

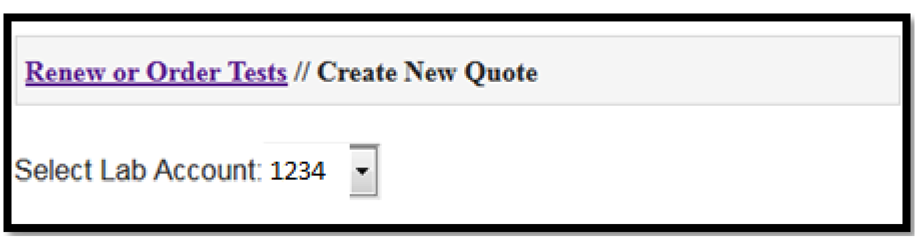
Note 1: *The Lab Account Owner can set permissions for a buyer or purchasing agent so that they may create a quote and order tests on behalf of the company. Refer to the Enrollment Module Permissions Guide for further details on how to add a user to a lab account and set permissions to renew/order tests.*

Note 2: *Your Current and Past Enrollment can be accessed through the "Order History" link under the "Enrollment" header.*

Click on "Renew/Order Tests", then click on "Create New Quote".

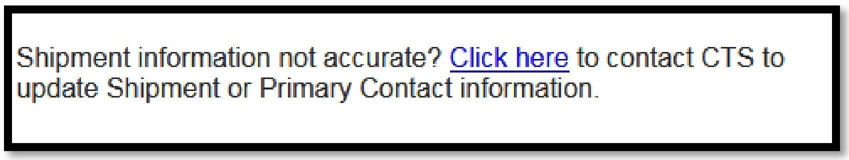


Your Lab Account number will automatically populate. If you are an owner or authorized user of multiple accounts, you may select the desired lab account from the drop-down menu.

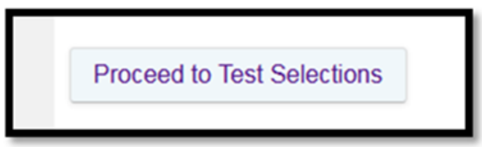


The shipping address and primary contact information for your lab account will appear.

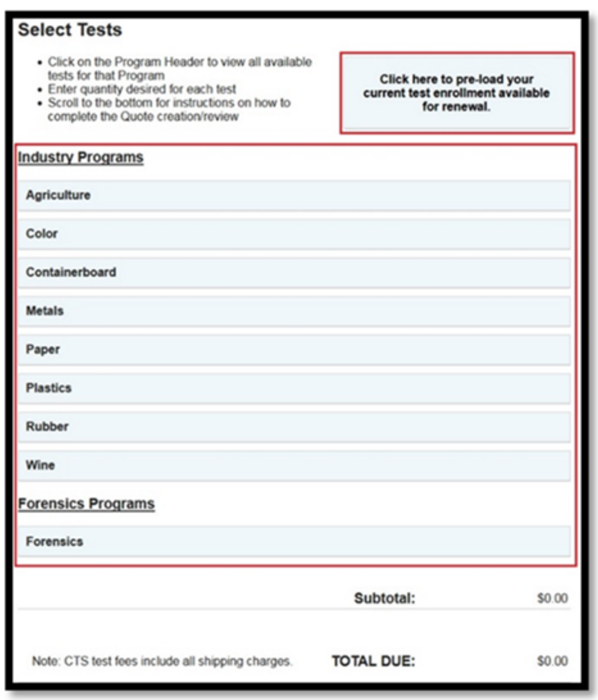
If any of the information needs to be updated, click on the link to access the form to submit your changes to CTS following the "How to Update Lab Account Information" walkthrough. **Please Note:** *Allow 2 business days for the changes to be confirmed by CTS. CTS will then alert you that the changes have been made, at which point you may log back into the portal and proceed to create your quote.*



If the shipment and primary contact information is accurate click "Proceed to Test Selections" to start building your quote.



The test selection page will open. Clicking the Header for each Program will allow you to view tests that are available for enrollment. If you have any tests that are available for renewal, you may click the "Click here to pre-load your current…" button to populate these tests into your in-progress quote.



To add a test, click on the desired program and enter the desired quantity for each test by typing or using the up-and-down arrows.

Agriculture

Enrollment in these tests will start with the next scheduled shipping date and will include shipments for a 12 month period.

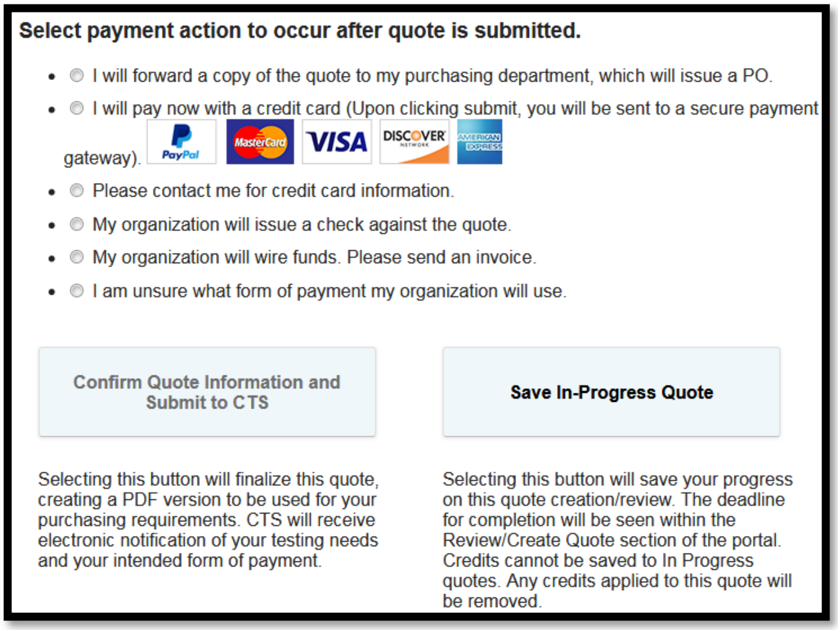
Test No	Test Series Name	Fee Per Test	Quantity	Extended Amount
801L	Soil Analyses Large Container - 1000mL	$570.00		$0.00
801S	Soil Analyses Standard Container - 500mL	$510.00		$0.00
802	Botanicals Analyses	$231.00		$0.00
803	Water Analyses	$210.00		$0.00

Once you have added all of the desired tests, proceed to the bottom of the page.

	Subtotal:	$0.00
Your Lab Account has available credits, apply to this quote? ○ Yes ○ No	**Credits:**	$175.00
Note: CTS test fees include all shipping charges.	**TOTAL DUE:**	$0.00

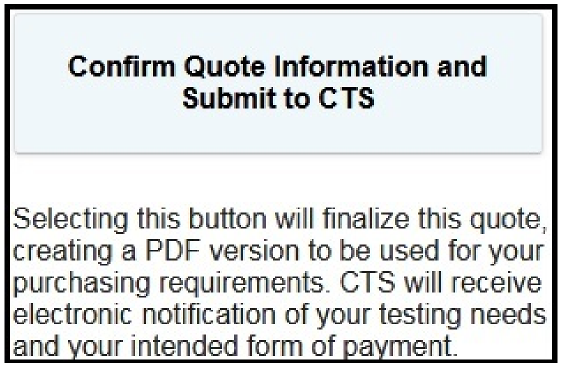
If your account has credits available, the option to apply credits will appear. Click “Yes” to apply the credits to your quote or click “No” if you do not want to use the credits. **Please Note:** *If you choose to save your Quote In-Progress for future review instead of confirming payment action and submitting the quote to CTS, any credits applied will be removed.*

Select your expected payment action, from the choices listed.

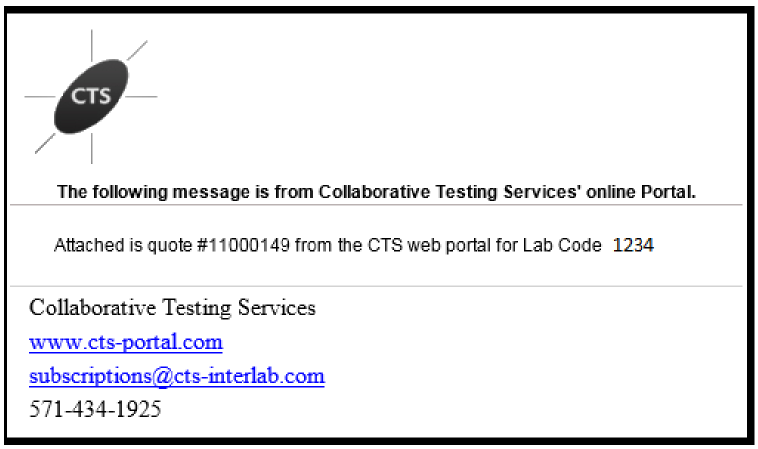


- **I will forward a copy of the quote to my purchasing department, which will issue a PO.**
  - Select this option if your organization will issue a PO for the testing included in your quote.
- **I will pay now with a credit card (Upon clicking submit, you will be sent to a secure payment gateway).**
  - Select this option if you would like to check out immediately with credit card via PayPal's secure payment gateway. Note that you do not need a PayPal account in order to check out. You are able to check out as a guest.
- **Please contact me for credit card information.**
  - Select this option if you would like CTS to contact you via phone or email to request the credit card information. Provide the contact information for the credit card holder.
- **My organization will issue a check against the quote.**
  - Select this option if your organization intends to submit a check.
- **My organization will wire funds. Please send an invoice.**
  - Select this option if your organization intends to submit a wire or electronic payment. Provide the company name, billing address, email address for invoice submission and tax identification number if applicable.
- **I am unsure what form of payment my organization will use.**
  - Select this option if your organization has not determined how they will order/make payment. CTS will continue to contact you periodically until a form of payment has been identified.

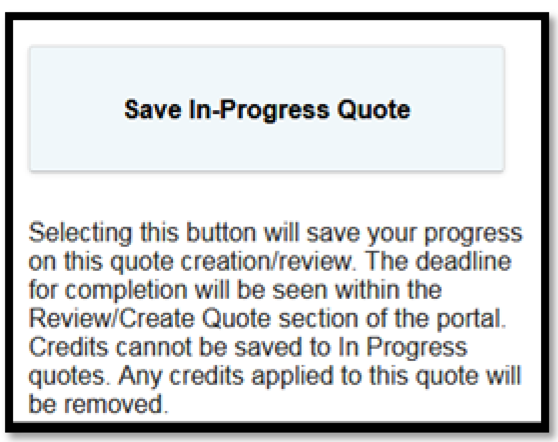
Click “Confirm Quote Information and Submit to CTS”.



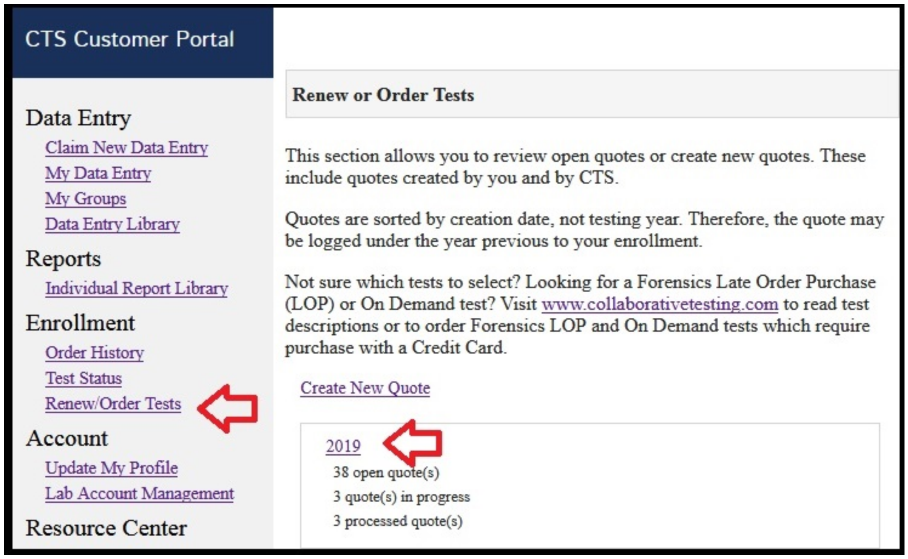
Submitting your quote to CTS will take you back to the “Renew/Order Tests” page. You will also receive a .pdf copy of the quote via e-mail from CTS.



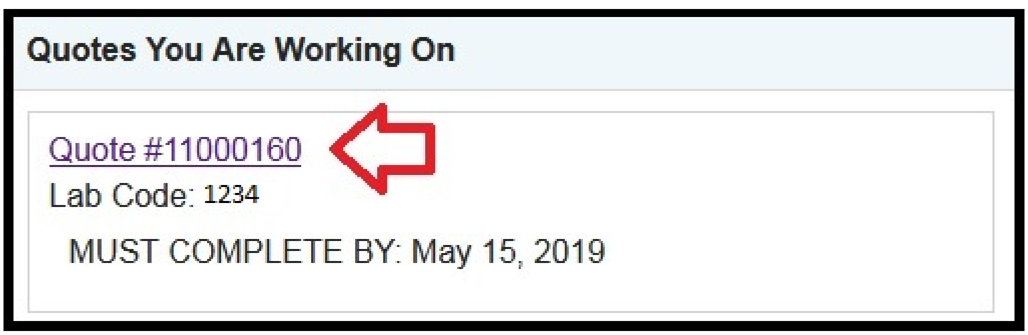
If you are not ready to submit your in-progress quote to CTS, you may click “Save In-Progress Quote”. Note that saving a quote as “In-Progress” **does not** submit your quote to CTS and will remove any applied credits.



To return to an In-Progress quote click “Renew/Order Tests” on the left-hand rail menu and locate it by clicking on the test year.



In-Progress Quotes will be listed underneath the header titled “Quotes You Are Working On”. Click the quote number to re-open your Quote and complete your renewal or order.

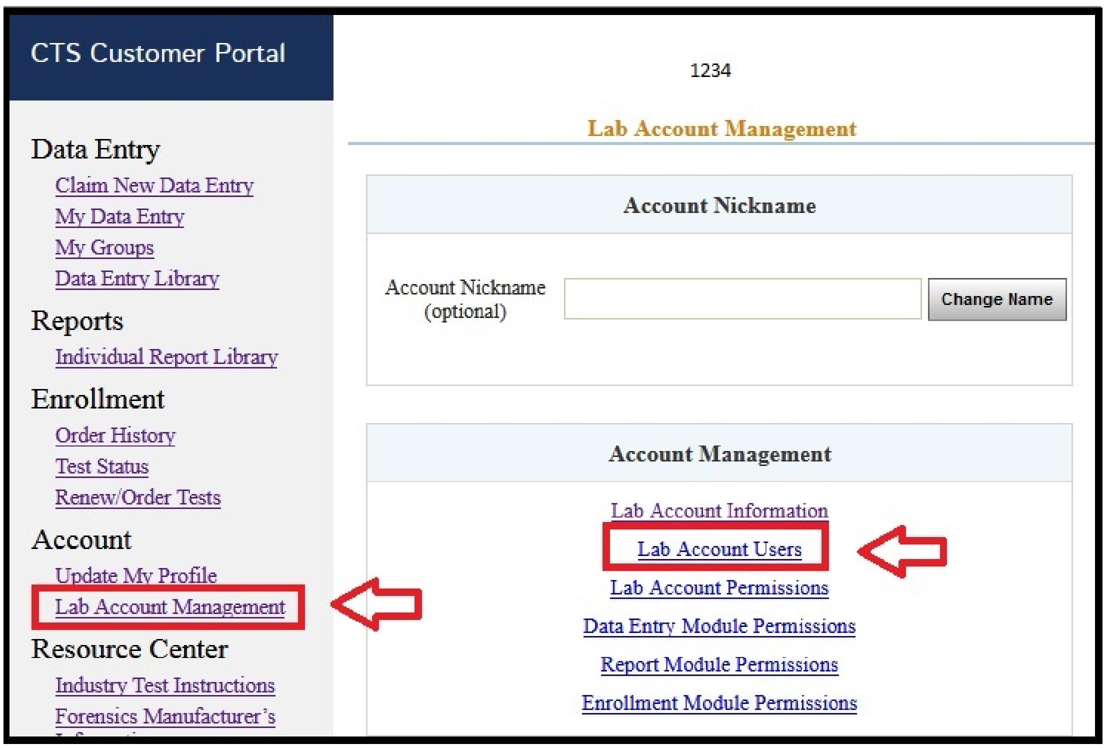


How to Add Users to a Lab Account

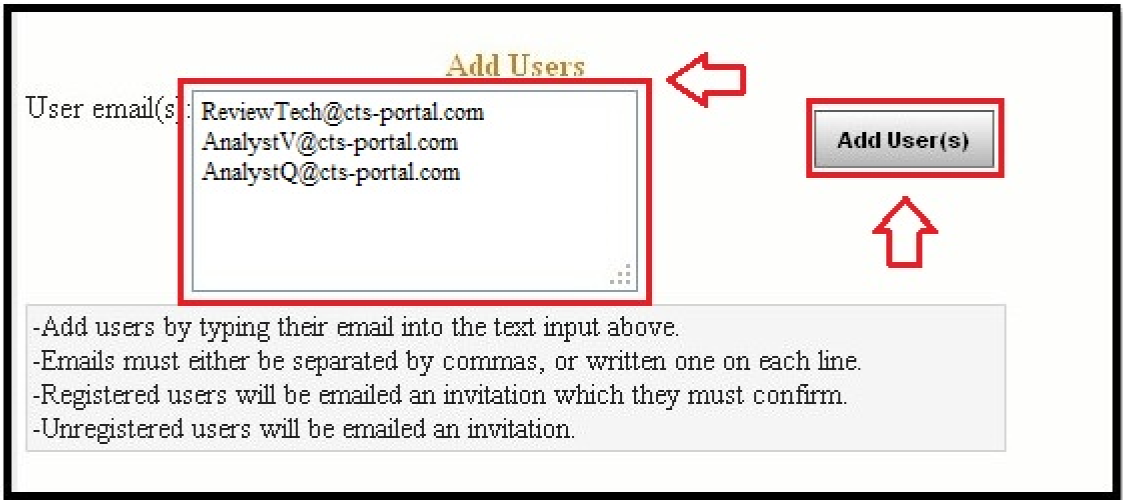
This guide explains how a Lab Account Owner (Primary Contact), or authorized user, can add users to the CTS Portal Lab Account.

Users who have claimed a test linked to your laboratory's CTS Lab Code are automatically added to your Lab Account User list. This guide explains how the Lab Account Owner (Primary Contact), or authorized user, can add additional users who need access to the expanded portal features, but have not been automatically added through claiming a test.

To add a user to your lab account, click on "Lab Account Management" to open the Lab Account Management page. If more than one account is displayed, select the account you would like to manage. Then, click on "Lab Account Users" under the Account Management section of the page.

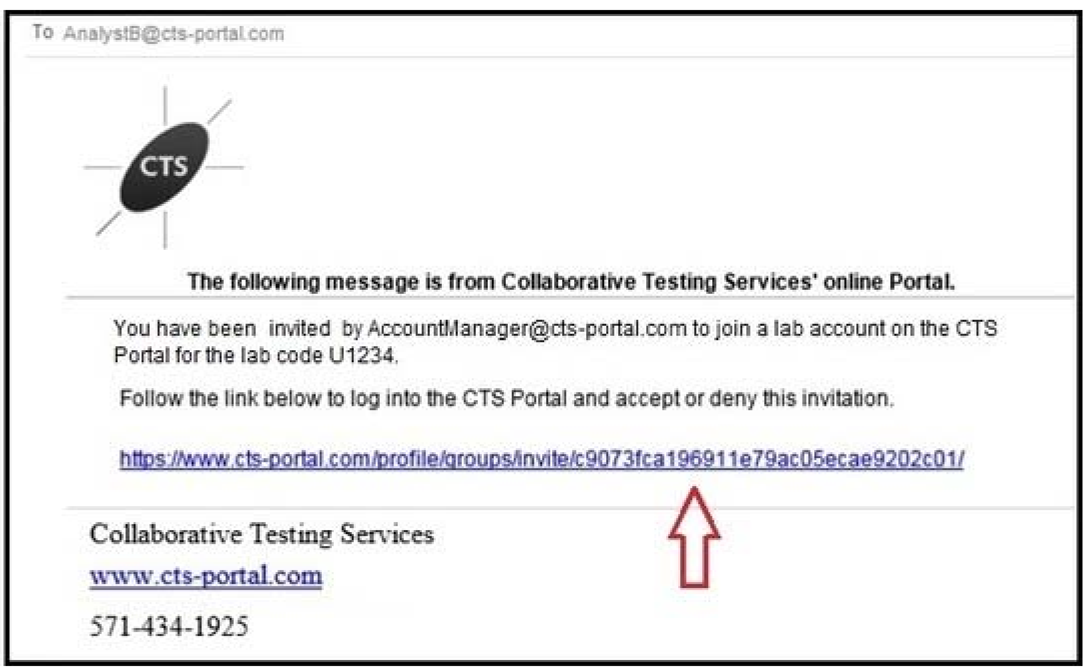


Type the user's e-mail address into the Add Users field. To add multiple e-mail addresses at once, enter one e-mail address per line, then click on “Add User(s)”.

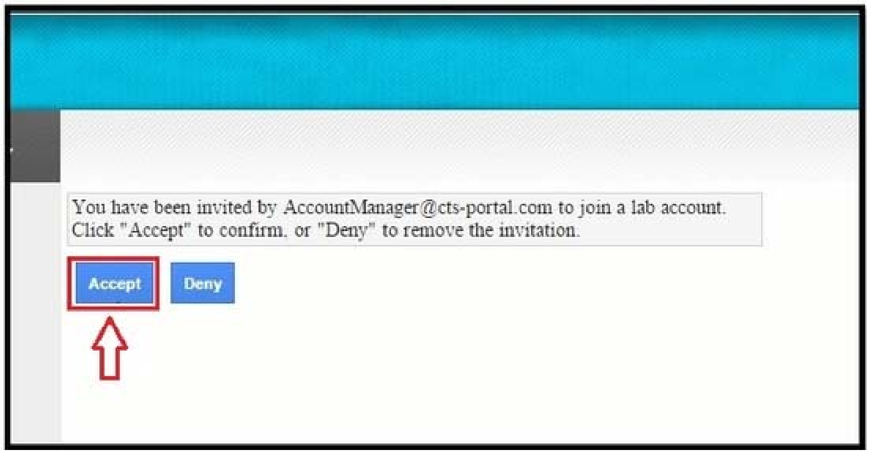


If the user is already registered on the portal, they will get an invitation by e-mail that they will need to confirm. If the user is not registered on the portal, they will receive an invitation by e-mail to **both** register for the portal and to confirm the invitation. All invites will appear in the Pending Invites section and will remain in this section until either you cancel the invite or the user accepts and joins the lab account.

This is an example of the e-mail invitation received by a registered user:



The user should click on the indicated link to access the response page. A page will be displayed with the options for the user to accept or deny the invitation. Click "Accept" to confirm the invitation.



This is an example of the e-mail invitation received by an unregistered user:

The user must first register on the portal by clicking on the first indicated link. This will take the user to the registration page.

Once registered, the user can return to the e-mail and click on the second indicated link to access the response page, where the user can accept the invitation.

After a user has accepted the lab account invitation, they will be shown in the User List section on the Lab Account Users' page.

The Lab Account Owner (Primary Contact) can now adjust this user's permissions to allow access to the expanded features of the portal. Proceed to guide "**How to Set Permissions for Lab Accounts**".

How to Set Permissions for Lab Accounts

This guide discusses the types of permissions that can be provided to additional users to allow access to the expanded features of the CTS Portal Lab Account.

The Lab Account Owner (Primary Contact) can choose to share access to the expanded portal features through the setting of user specific permissions. The permissions available to be set are broken down into the following sections, detailed explanations are accessed by clicking the name of the permission type.

Lab Account Permissions – Set additional authorized users to manage the Lab Account

Data Entry Module Permissions – Provide access to the Data Entry Library, preloaded testing codes, ability to unassign tests (for Forensics program only) and additional Data Entry Notification options

Report Module Permissions – Provide access to the Individual Report Library

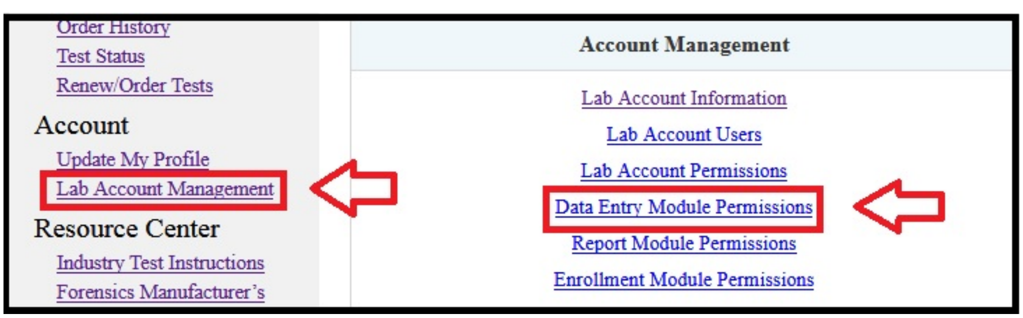
Enrollment Module Permissions – Provide access to Test Status, Order History, and Renew/Order Tests

Lab Account Owner Only Permissions

There are a few aspects of the expanded lab account permissions section that can only be accessed by the Lab Account Owner. The permission to view this information or perform these actions cannot be shared with any other users.

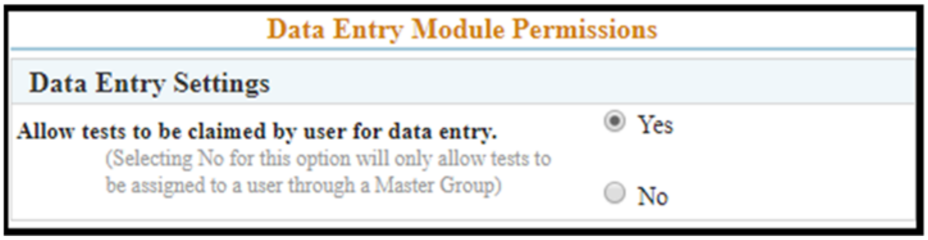
Data Entry Module Permissions - Lab Account Owner Only

The data entry module permissions page and data entry notifications subpage contain two control features that can only be accessed by the Lab Account Owner (Primary Contact). To view these, the Lab Account Owner needs to click on "Lab Account Management" to open the management page. Then click on "Data Entry Module Permissions" in the Account Management section.



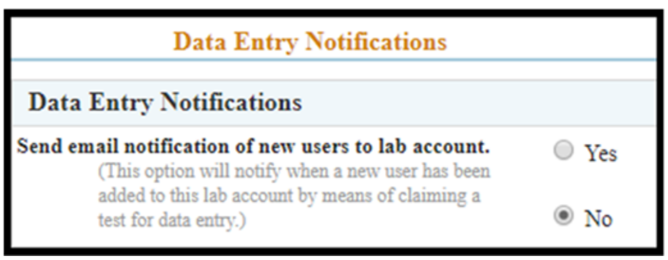
The Data Entry Module Permissions page will open, the top of which is only seen by the Lab Account Owner.

In this section, the Lab Account Owner can set a rule for claiming data entry, the default setting is shown below. This setting allows tests to be claimed by users for data entry through use of the Participant Code and WebCode provided by CTS as an attachment with the emailed shipping notification. If you select “No”, tests can only be claimed or assigned by users who have access to the preloaded codes.



From the Data Entry Module Permissions page, access to the Data Entry Notifications is available on the right-hand menu. The Data Entry Notifications page will open, the top of which is only seen by the Lab Account Owner.

In this section, the Lab Account Owner can set a rule for notifications, the default setting is shown below. This setting will let you choose whether you want to receive an email notification whenever a new user has been added to the lab account by claiming a test for data entry.

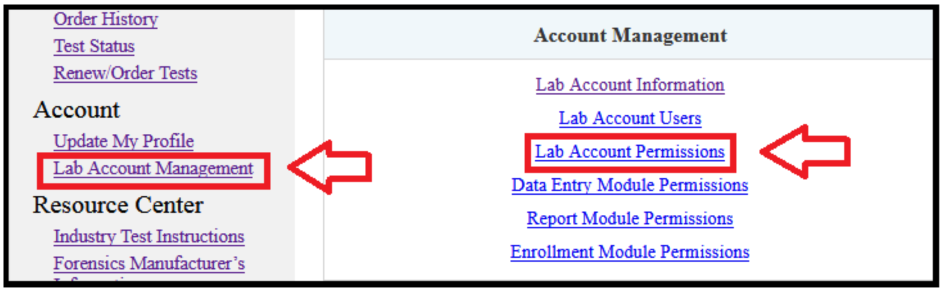


For both of these settings, click on the circle next to the appropriate selection and click the “Apply” button. The Apply button is located below the user list of permissions, you may need to scroll down the page to locate the button.

How to Set Lab Account Permissions

This guide explains how a Lab Account Owner (Primary Contact), or authorized user, can set the Lab Account permissions. This will allow an authorized user to be able to invite other users to the lab account and set permissions for all users.

To set the permissions, click on "Lab Account Management" to open the management page. Then click on "Lab Account Permissions" under the Account Management section.



The Lab Account Permissions page will open.

Users must be added to the permissions lists before you can provide them with the indicated permission. Use the drop-down list to select a specific user to add to the permissions list and click "Add to List". You can add all users to the permissions list by clicking on "Add All Users".

The drop-down list will show all users linked directly to your Lab Account. This occurs automatically when a user claims a test linked to your LabCode. If you cannot find the user in this list you may need to add them to your Lab Account. (How to Add Users to a Lab Account) This is common for Managers within Master Groups in Forensics as the Groups do not have a direct and unique connection to a LabCode.

Once the user or users have been added to the list, click on the box under the specific aspects of the Lab Account Management tools that you would like them to be able to access and manage.

To remove a user from the permissions list and remove all permissions, click the box in the last column for that user.

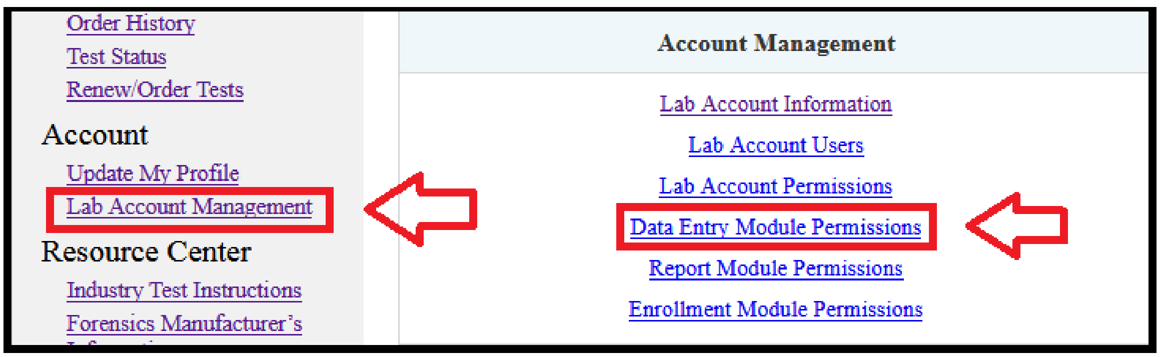
Click the "Apply" button to save any changes to the permissions.

Note: *If you select the box under the column heading, it will add a check mark and activate the permission for all users.*

How to Set Data Entry Module Permissions

This guide explains how a Lab Account Owner (Primary Contact), or authorized user, can set the Data Entry Module permissions for additional users to have access to the Data Entry Library and utilize the preloaded Participant Code/WebCode feature for your laboratory's specific tests/cycles. The Forensics Program has an additional permission that allows users to unassign tests that have been claimed or assigned in error.

To set the permissions, click on "Lab Account Management" to open the management page. Then click on "Data Entry Module Permissions" in the Account Management section.



The Data Entry Module Permissions page will open.

Note: *If you are the Lab Account Owner, you will see a section on Data Entry Settings, this section is one of the few areas only accessible by the Lab Account Owner. This is described in the main walkthrough on permissions (How to Set Permissions for Lab Accounts), this current guide only discusses permissions which can be shared with other users.*

Users must be added to the permissions lists before you can provide them with the indicated permission. Use the drop-down list to select a specific user to add to the permissions list and click "Add to List". You can add all users to the permissions list by clicking on "Add All Users".

The drop-down list will show all users linked directly to your Lab Account. This occurs automatically when a user claims a test linked to your LabCode. If you cannot find the user in this list you may need to add them to your Lab Account. (How to Add Users to a Lab Account) This is common for Managers within Master Groups in Forensics as the Groups do not have a direct and unique connection to a LabCode.

Once user(s) have been added to the list, you can choose whether a user can view the lab account data entry library for all disciplines or for specific forensic disciplines. Only one of the two columns can be selected per user. To allow a user to view all disciplines, click the box located in the "View Lab Account Data Entry Library" column for the specific user.

Clients in our Forensics Program can also choose to allow a user to view only specific disciplines, click on "Add a discipline" in the "View Only Specific Discipline Data" column for the specific user. You can add as many specific disciplines as appropriate.

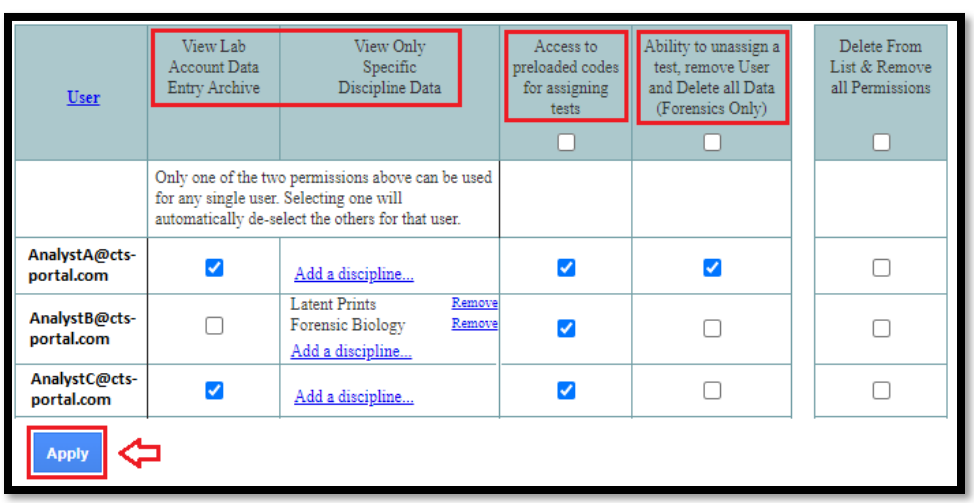
To allow the user access to preloaded codes for claiming or assigning tests, click the box in the "Access to preloaded codes for assigning tests" column for each specific user. This will provide them with access to the Participant Code(s)/LabCode(s) available for active tests. When they go to claim or assign a test, they will be able to select from a drop-down list of available Participant Code(s) or LabCode(s). After they select the desired Participant Code or LabCode, the corresponding WebCode will be automatically loaded.

The ability to unassign a test following the "How to Unassign a Test (Forensics Only)" walkthrough can be given by selecting the box associated with a specific user. This will provide the authorized user with the ability to unassign a test that has been claimed by or assigned to the wrong user within the Forensics Program. This feature is only available prior to the data due date for tests that have not been submitted. Industry Program users are encouraged to utilize the "How to Add a Cycle to Your Account and Claim for a Group" walkthrough to allow multiple users to access the same cycle.

To remove a user from the permissions list and remove all permissions, click the box in the last column for that user.

Click the "Apply" button to save any changes to the permissions.

Note: *Selecting the box in the column heading will add a check mark and activate the permission for all users.*



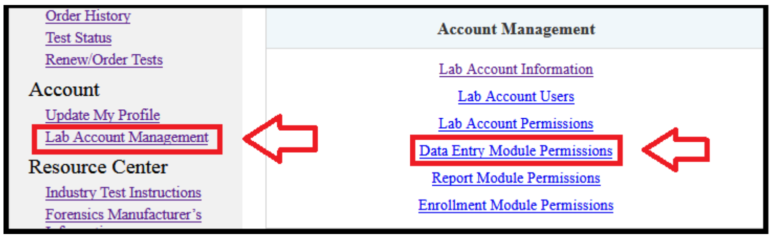
User	View Lab Account Data Entry Archive	View Only Specific Discipline Data	Access to preloaded codes for assigning tests	Ability to unassign a test, remove User and Delete all Data (Forensics Only)	Delete From List & Remove all Permissions
	Only one of the two permissions above can be used for any single user. Selecting one will automatically de-select the others for that user.				
AnalystA@cts-portal.com	☑	Add a discipline...	☑	☑	☐
AnalystB@cts-portal.com	☐	Latent Prints Remove Forensic Biology Remove Add a discipline...	☑	☐	☐
AnalystC@cts-portal.com	☑	Add a discipline...	☑	☐	☐

Apply

How to Set Data Entry Notification Permissions

This guide explains how a Lab Account Owner (Primary Contact), or authorized user, can set the Data Entry Notification permissions for additional users to receive notifications from the portal regarding data entry.

To set the permissions, click on "Lab Account Management" to open the management page. Then click on "Data Entry Module Permissions" in the Account Management section.



The Data Entry Module Permissions page will open. From here, access to the Data Entry Notifications is available on the right-hand menu.

The Data Entry Notifications page will open.

Note: *If you are the Lab Account Owner, you will see a boxed section on Data Entry Notifications, this section is one of the few areas only accessible by the Lab Account Owner. This is described in the main walkthrough on permissions (How to Set Permissions for Lab Accounts), this current guide only discusses permissions which can be shared with other users.*

Users must be added to the permissions lists before you can provide them with the indicated permission. Use the drop down list to select a specific user to add to the permissions list and click "Add to List". You can add all users to the permissions list by clicking on "Add All Users".

The drop down list will show all users linked directly to your Lab Account. This occurs automatically when a user claims a test linked to your LabCode. If you cannot find the user in this list you may need to add them to your Lab Account. (How to Add Users to a Lab Account) This is common for Managers within Master Groups in Forensics as the Groups do not have a direct and unique connection to a LabCode.

Once the user or users have been added to the list, you can choose whether a user will receive a notification email for four different options.

- **Notification for Tests/Cycles not Claimed.** *(Default "Yes")* Email reminder is sent two weeks before data due date if one or more tests/cycles have not been claimed.

- **Notification for Tests/Cycles not Submitted.** *(Default "Yes")* Email reminder is sent two days before data due date notifying that one or more users' have claimed tests/cycles which have not been submitted to CTS.

- **Notification of Individual Submission.** *(Default "No")* Email is sent confirming when a user submits their data to CTS along with a PDF copy of the submission. Clients in our Forensics Program can also choose to receive notifications for specific disciplines, click on "Add a discipline" in the "Receive Notification of Individual Submission for Specific Discipline" column for the specific user. You can add as many specific disciplines as appropriate.

- **Notification of Bulk Submission from Master Group (Forensics Only).** *(Default "No")* Email will be sent when tests are submitted in bulk confirming the submission and listing all Participant Codes submitted for that test.

To remove a user from the permissions list and remove all permissions, click the box in the last column for that user. The Lab Account Owner cannot be removed from this list.

Click the "Apply" button to save any changes to the permissions.

Note: *If you select the box in the column heading, it will add a check mark and activate the permission for all users.*

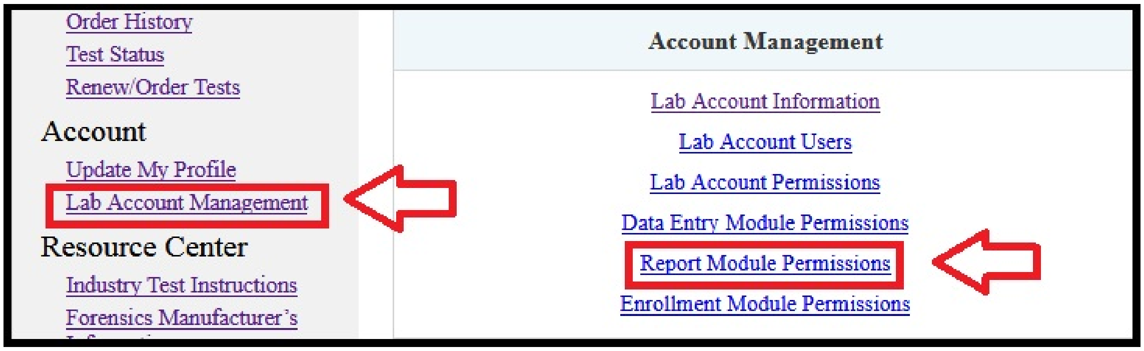
User	Receive Notifications of Tests/Cycles Not Claimed ☐	Receive Notification of Tests/Cycles Not Submitted ☐	Receive Notification of Individual Submission ☐	Receive Notification of Individual Submission for Specific Discipline	Receive Notification of Bulk Submission from Master Group (Forensics Only) ☐	Delete From List & Remove all Permissions ☐
			Only one of the two permissions above can be used for any single user. Selecting one will automatically de-select the others for that user.			
LabAccount Owner@CTS -interlab.com	☑	☑	☐	Add a discipline...	☐	
Additional User@CTS-interlab.com	☑	☑	☐	Add a discipline...	☐	☐

Apply

How to Set Report Module Permissions

This guide explains how a Lab Account Owner (Primary Contact), or authorized user, can set the Report Module permissions for additional users to allow access to the Individual Report Library.

To set the permissions, click on "Lab Account Management" to open the management page. Then click on "Report Module Permissions" in the Account Management section.



The Report Module Permissions page will open.

Users must be added to the permissions lists before you can provide them with the indicated permission. Use the drop down list to select a specific user to add to the permissions list and click "Add to List". You can add all users to the permissions list by clicking on "Add All Users".

The drop down list will show all users linked directly to your Lab Account. This occurs automatically when a user claims a test linked to your LabCode. If you cannot find the user in this list you may need to add them to your Lab Account. (How to Add Users to a Lab Account) This is common for Managers within Master Groups in Forensics as the Groups do not have a direct and unique connection to a LabCode.

Once the user or users have been added to the list, you can set preferences to allow a user to view all reports, or view only his or her own reports. Permission to view the reports also allows the user to print/download the report through their internet browser. Only one of the three columns can be selected per user.

Clients in our Forensics Program can also choose to allow viewing of reports for all disciplines or specific reports under added disciplines. Click on "Add a discipline" to add specific disciplines. You can add as many disciplines as needed.

Click the box in the "Request Bulk Report PDFs" column to turn this permission on or off. This permission allows a user to request an e-mail of multiple Individual Reports sent as a .zip file attachment. This permission does not affect the viewing permissions described above.

To remove a user from the permissions list and remove all permissions, click the box in the last column for that user.

Click the "Apply" button to save any changes to the permissions.

Note: *If you select the box in the column heading, it will add a check mark and activate the permission for all users.*

User	View All Reports	View Only Specific Discipline Reports	View Own Reports	Request Bulk Report PDFs ☐	Delete From List & Remove all Permissions ☐
	Only one of the three permissions above can be used for any single user. Selecting one will automatically de-select the others for that user.				
AnalystA@cts-portal.com	☑	Add a discipline...	☐	☑	☐
AnalystB@cts-portal.com	☑	Add a discipline...	☐	☑	☐
AnalystC@cts-portal.com	☑	Add a discipline...	☐	☑	☐

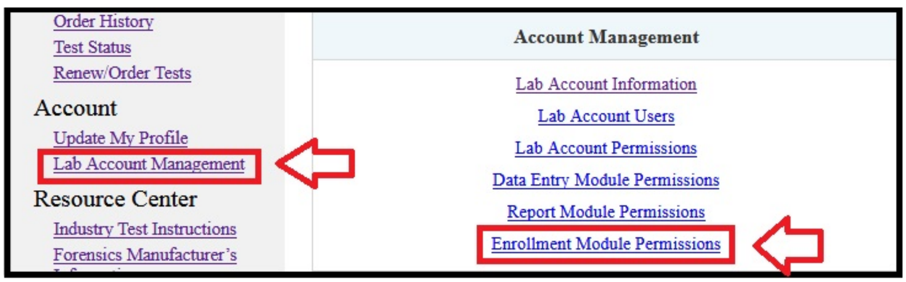
Apply

How to Set Enrollment Module Permissions

This guide explains how a Lab Account Owner (Primary Contact), or authorized user, can set the Enrollment Module permissions for additional users to allow access to the Order History, Test Status, and Renew/Order Tests features for the lab account.

Note: *Checking the permission for a user to access the "Renew/Order Tests" feature will also allow the user to view and request updates to the "Lab Account Information" section under "Lab Account Management". Refer to the How to Update Lab Account Information Guide for further details on the "Lab Account Information" section of your portal account.*

To set the permissions, click on "Lab Account Management" to open the management page. Then click on "Enrollment Module Permissions" in the Account Management section.



The Enrollment Module Permissions page will open.

Users must be added to the permissions lists before you can provide them with the indicated permission. Use the drop down list to select a specific user to add to the permissions list and click "Add to List". You can add all users to the permissions list by clicking on "Add All Users".

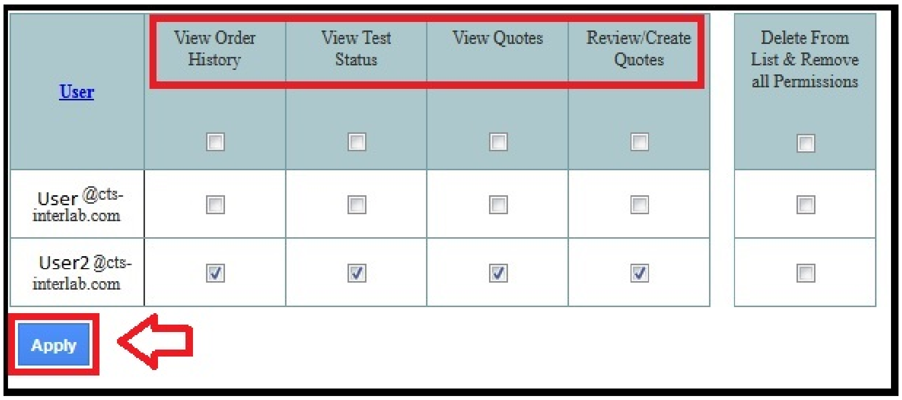
The drop down list will show all users linked directly to your Lab Account. This occurs automatically when a user claims a test linked to your LabCode. If you cannot find the user in this list you may need to add them to your Lab Account. (How to Add Users to a Lab Account) This is common for Managers within Master Groups in Forensics as the Groups do not have a direct and unique connection to a LabCode.

Once the user or users have been added to the list, you can set the user's access Test Status, Order History, and Renew/Order Tests by clicking the appropriate box for each specific user.

To remove a user from the permissions list and remove all permissions, click the box in the last column for that user.

Click the "Apply" button to save any changes to the permissions.

Note: *If you select the box in the column heading, it will add a check mark and activate the permission for all users.*



How to Unassign a Test (Forensics Only)

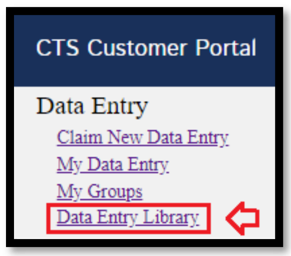
This guide walks the Lab Account Owner through unassigning a test that has been claimed/added to a user profile.

If a test is claimed in error, the Lab Account Owner (Primary Contact), or authorized user, can unassign a test. This feature is only available prior to the data due date for tests that have not been submitted within the Forensics Program. Industry Program users are encouraged to utilize the "**How to Add a Cycle to Your Account and Claim for a Group**" walkthrough to allow multiple users to access the same cycle.

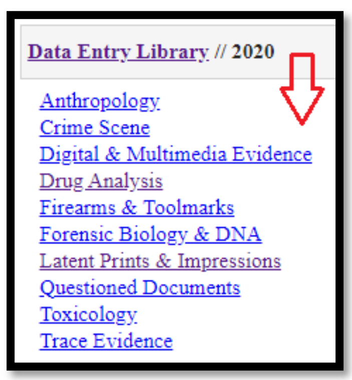
Note: *Unassigning a test deletes all entered data!*

To Unassign a Test

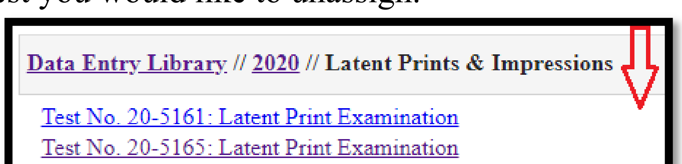
Click on "Data Entry Library", under the "Data Entry" heading on the left hand side of the screen.



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



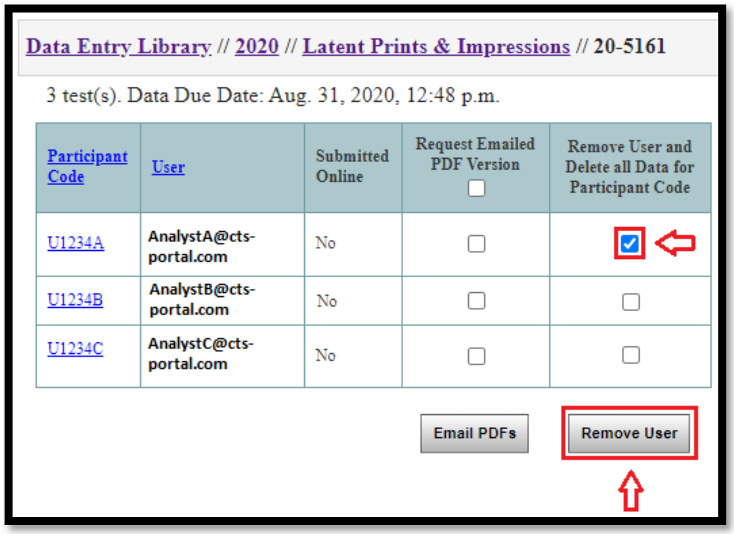
Select the specific test you would like to unassign.



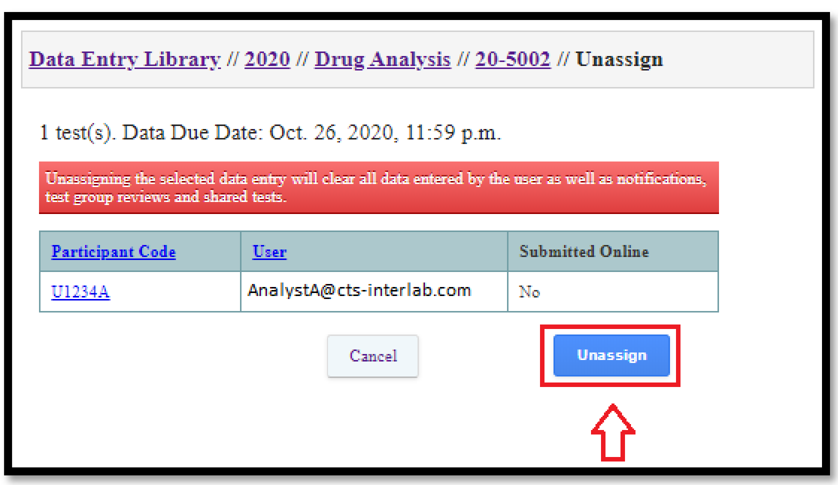
Click the box under the column "Remove User and Delete all Data for Participant Code" for the user/participant code you would like to remove from the test. This feature is only available prior to the data due date for tests that have not yet been submitted.

Note: *Unassigning a test deletes all entered data!*

Click on the "Remove User" button.



A confirmation window will appear where you can choose to cancel this action or continue with unassigning the test.



After unassigning, 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.