

KERN REGIONAL CRIME LABORATORY

Laboratory Services Section, Quality Assurance Unit



Information Bulletin on Portal

QT70933 v23

Creation Date: 10/29/2013

The purpose of this document is to provide law enforcement customers information on how to navigate and enroll agency representatives in Portal, the laboratory's evidence submission and web-based reporting system.

Portal is restricted to Kern Regional Crime Laboratory customer agencies. It can be accessed via a link on the Evidence Submission/Reporting page in the "Services" section of the Kern Regional Crime Laboratory's website (kerncounty.com/government/departments/kern-regional-crime-laboratory/services/evidence-submission-reporting). This link will take users to the log-in screen. Portal can also be accessed through the following URL: (<https://jtiresult.co.kern.ca.us/Portal>).

Enrollment of Agency Representatives

It is the responsibility of the Kern Regional Crime Laboratory (KRCL) to enroll agency administrator(s) as designated by each agency. Once enrolled, each administrator will receive a username and password. The username will be the individual's first initial and full last name (if the last name is hyphenated, then the name following the hyphen will be used). The default password will be the same.

Currently, four roles with different levels of permissions in Portal:

- **Agency Administrator** - administer users (add and edit Reps) for their agency, view all incomplete, submitted, in progress, and released cases and requests for their agency (DDAs are given permissions to view results from multiple agencies), and submit requests to the laboratory for analysis.
- **Super User** - submit and edit cases and requests for analysis to the laboratory. They can view all incomplete, submitted, in progress, and released cases and requests for their agency.
- **Case Entry** - submit and edit cases and requests for analysis to the laboratory and view cases that they created or that were created by other members of their agency. They can view all incomplete and submitted cases and requests for their agency but can't see the details for In Progress or Released Cases by others in their agency.

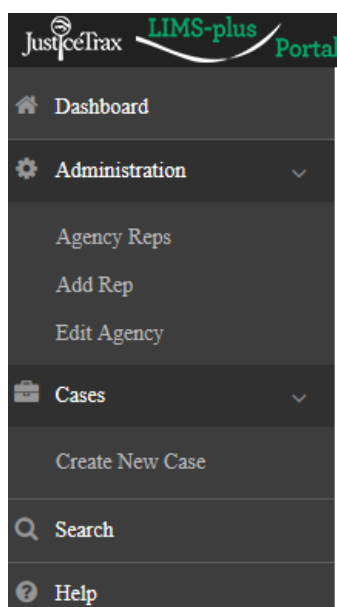
CONTROLLED DOCUMENT

*The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated.
Refer to the official electronic version in Qualtrax® for current information.*

- **View Requests Only** – view cases and requests that have been submitted to LIMS. They can also view released requests and download reports if available.

It is the responsibility of the Agency Administrator(s), and not the laboratory, to enroll the approved members of their agency. The following instructions are for adding an agency representative to Portal. Log into the current version of Portal.

1. In the black sidebar at the left under Administration, click on 'Add Rep'. This will take the agency administrator to the Rep Details screen. The Rep Details screen is split into three sections.



2. In the first section add the Username and password. The recommended format for the username is the agency representative's first initial and full last name (if the last name is hyphenated, then the name following the hyphen will be used). The initial password will be the same as the username; confirm the password. The agency representative can go into their profile and change the password after they are enrolled.
3. In the Security Role field, click on the down arrow and choose the appropriate role (e.g., Agency Administrator, Super User, Case Entry, View Requests Only). The Primary Agency field should show your agency's name. Application Access should be 'On'.

CONTROLLED DOCUMENT

*The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated.
Refer to the official electronic version in Qualtrax for current information.*

Rep Details

Login Information

Username



*

Password



Confirm Password



Security Role

Case Entry



Primary Agency

Kern County District Attorney - Criminal

Application Access 

ON

- The next section is titled 'Personal Information' and has fields for name, badge number, phone number, and email address. When entering a new member, the following information is required: **First name** (the first letter of first name capitalized, all following letters in lower case), **Last name** (the first letter of last name capitalized, all following letters in lower case—*may use capitals after the first if that is applicable to the name*) do not use all capitals or all lower case for names. Also required is an **ID/Badge number** and **current agency email address**. *

Personal Information

Prefix

Select...



First Name

*

Middle Name

Last Name

*

Suffix

Select...



Badge Number

Phone Numbers

 Add Phone Number

Email

*

CONTROLLED DOCUMENT

*The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated.
Refer to the official electronic version in Qualtrax for current information.*

***Note:** If it is required by the agency that all reports be sent to a single agency representative, be sure to include that representative's e-mail for all users.

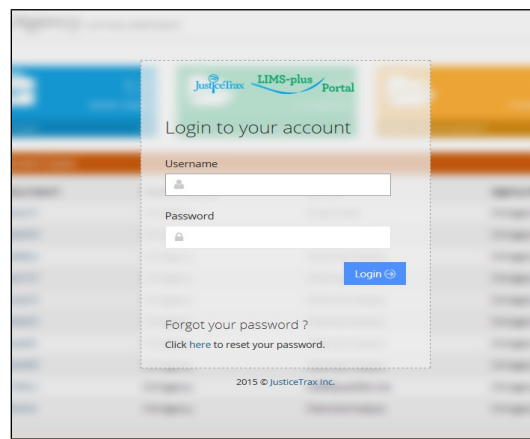
5. The last section in the 'Rep Details' screen is titled 'Location Information' with fields for address, city, state, etc. Enter information as needed by your agency. When finished, click the blue save button at the bottom of the screen to save all the 'Rep Details'. The agency representative is now enrolled in Portal with the permissions that were set with the role they were given.

Location Information

Address	
Address(cont)	
City	Select...
State	Select...
County	Select...
Country	Select...
Zip Code	

Instructions for Navigating Portal

Log into the current version of Portal.



CONTROLLED DOCUMENT

*The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated.
Refer to the official electronic version in Qualtrax for current information.*

Dashboard

Upon logging in, Portal directs the user to the homepage, also known as the Dashboard. The Dashboard consists of four tiles (Incomplete Submissions, Submissions, In Progress, and Released), Recent Activity, Recent Lab Activity, a side bar, and profile.

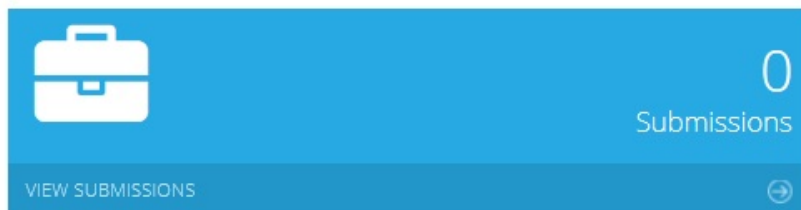
Each portion of the dashboard is described below:

1. Incomplete Submissions tile



Clicking on the Incomplete Submissions tile will show the user a complete list of cases that have been entered into Portal but the information has not been submitted to the laboratory using the *Submit to LIMS* button. This will allow users to easily view a list of incomplete submissions for their agency with the Agency Case Number (ACN), Status, and Last Updated date readily available. Incomplete submissions are editable and can be submitted later.

2. Submissions tile



Clicking on the Submissions tile will take the user to a list of cases with information submitted by the agency to the laboratory via Portal. **This usually means that the evidence has not yet been physically delivered to the laboratory** or that the request has not yet been processed by the Evidence Control Unit. The list of submitted cases will also show ACN, Status, and Last Updated date.

CONTROLLED DOCUMENT

*The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated.
Refer to the official electronic version in Qualtrax for current information.*

3. In Progress tile



The In Progress tile will take the user to a list of all requests that have been submitted to the laboratory by the agency and are currently physically at the Laboratory 'In Progress' (meaning a report has not been released). The list of In Progress cases will show the ACN, Service, Status, and Last Updated date.

4. Released tile



Clicking on the Released tile will take the user to a list of cases made by the agency with requests that have been released. 'Released' indicates that analysis encompassed by that request has been completed by the laboratory, and that a

final report has been created and is available within Portal. Clicking the  icon next to a released request will download a copy of the released report. If the report does not download properly, the IT department of the agency should be notified to make sure the proper software is available for downloading pdf documents.

Search Request Agency Case Details

Results				
5 records per page		Search:		
ACN	Service	Status	Last Updated	Report
	0001 - Basic Urine Drug Screen	Released	02/12/2015	
	0001 - Basic Urine Drug Screen	Released	02/11/2015	
	0001 - Urine Alcohol Analysis	Released	02/12/2015	
	0002 - Basic Urine Drug Screen	Released	02/12/2015	
	0001 - Drug Analysis - Physical Examination	Released	01/06/2015	
← Previous 1 2 3 4 5 Next →				

CONTROLLED DOCUMENT

The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated. Refer to the official electronic version in Qualtrax for current information.

5. Recent Activity

This section of the Dashboard will list the cases most recently created by the agency. The list will show ACN, the Representative who created the case, Status, the number of Evidence Items in the case, the number of Individuals in the case, the number of Offenses in the case, the number of Requests in the case, the number of Attachments in the case (Note: no attachments should be added to any case at this time), and the Date the case was created.

Recent Activity								
5	records per page	Search:						
ACN	Representative	Status	# Evidence Items	# Individuals	# Offenses	# Requests	# Attachments	Date
XXX25	Emily Walter	Accepted	1	1	1	1	0	02/06/2015
XXX26	Emily Walter	Entered	1	1	0	1	0	02/06/2015
← Previous 1 Next →								

6. Recent Lab Activity

This section of the Dashboard will list the cases most recently updated by the laboratory. The list will show ACN, the Requesting Rep for the listed request, the requested Service, the Agency Name, and the Status of the request.

Recent Lab Activity				
5	records per page	Search:		
Agency Case #	Requesting Rep	Service	Agency Name	Status
	Kevin Miller	Basic Blood Drug Screen	McFarland Police Department	Released
	Kevin Miller	Basic Blood Drug Screen	Kern High School District	InProgress
	Kevin Miller	Basic Blood Drug Screen	Kern High School District	InProgress
	Kevin Miller	Basic Urine Drug Screen	Tehachapi Police Department	InProgress
	Kevin Miller	Basic Urine Drug Screen	Tehachapi Police Department	InProgress
← Previous 1 2 3 4 5 Next →				

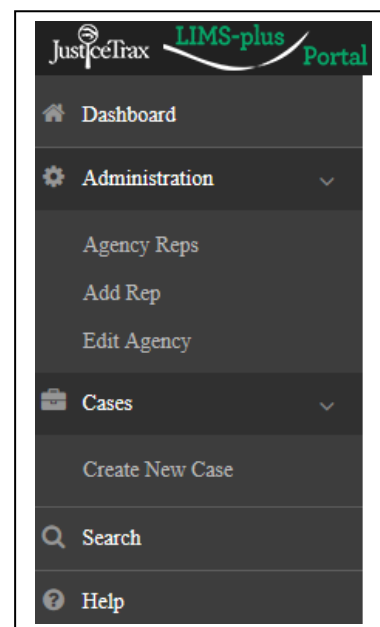
CONTROLLED DOCUMENT

The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated.
Refer to the official electronic version in Qualtrax for current information.

7. Sidebar

The sidebar contains the following options:

- Dashboard
- Administration (for Agency Admins)
 - Agency Reps
 - Add Rep
 - Edit Agency
- Cases
 - Create New Case
- Search
- Help



Each option's functions are described below:

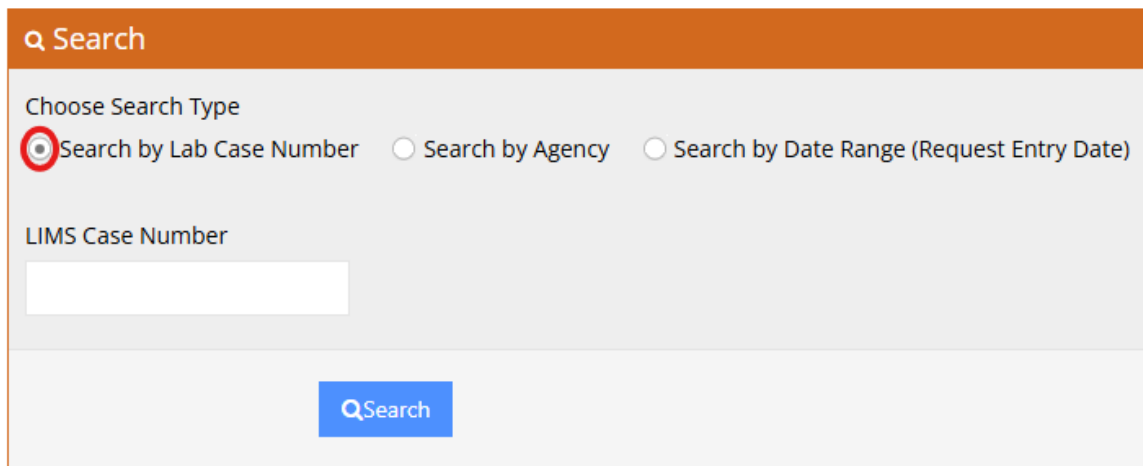
- Dashboard
 - This icon will return the user to their Dashboard.
- Administration (available only to Agency Administrators)
 - Agency Reps
 - This icon will take the user to a list of all available Agency Reps within their agency. From this screen, Administrators can edit, add, enroll or unenroll Agency Reps, assign them usernames and passwords, designate a permission level, and edit contact information.
 - Add Rep
 - This icon will take the user to the Rep Details screen, which will allow the user to add a new Agency Rep and assign Portal permissions.
 - Edit Agency
 - This icon will take the user to the Agency Details screen, which will allow the user to edit the agency primary contact, e-mail, fax, phone number(s), and address.
- Cases (as permitted by role)
 - Create New Case
 - This icon will take the user to the Create New Case Request screen where a user can begin creating a new case for submission to the laboratory. The Protocol for Submission of

CONTROLLED DOCUMENT

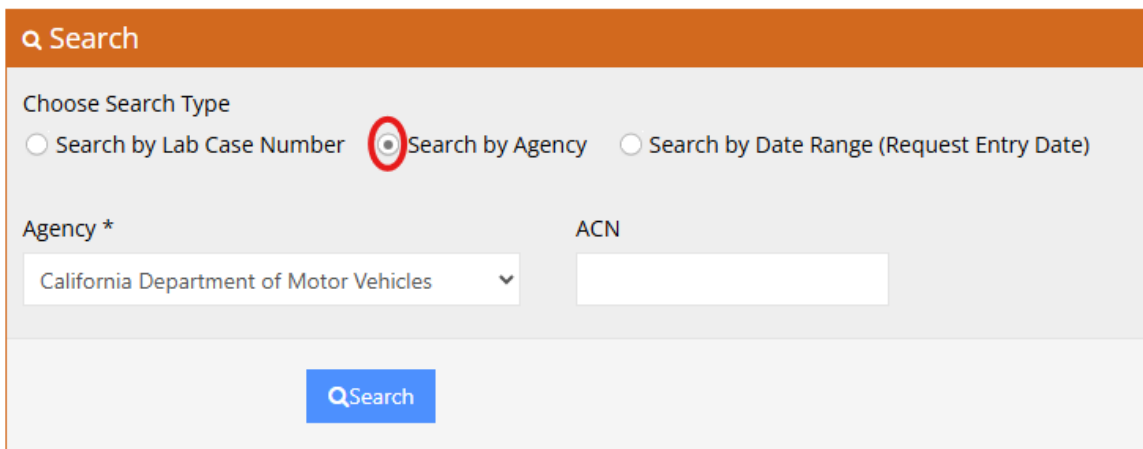
The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated. Refer to the official electronic version in Qualtrax for current information.

Cases through Portal ([QT301343](#)) will have information on this process and can be accessed through the lab's website or can be requested at the laboratory.

- Search
 - This icon will take the user to the Search screen. This will allow users to search for cases using the LIMS Case Id (Laboratory number), or by Agency ACN and request status information.



The screenshot shows the 'Search' interface with an orange header bar containing a magnifying glass icon and the word 'Search'. Below the header, the text 'Choose Search Type' is followed by three radio buttons. The first radio button, labeled 'Search by Lab Case Number', is selected and circled in red. The other two options are 'Search by Agency' and 'Search by Date Range (Request Entry Date)'. Below these options is a text input field labeled 'LIMS Case Number'. At the bottom of the form is a blue button with a magnifying glass icon and the text 'Search'.



The screenshot shows the 'Search' interface with an orange header bar containing a magnifying glass icon and the word 'Search'. Below the header, the text 'Choose Search Type' is followed by three radio buttons. The second radio button, labeled 'Search by Agency', is selected and circled in red. The other two options are 'Search by Lab Case Number' and 'Search by Date Range (Request Entry Date)'. Below these options are two input fields: a dropdown menu labeled 'Agency *' with 'California Department of Motor Vehicles' selected, and a text input field labeled 'ACN'. At the bottom of the form is a blue button with a magnifying glass icon and the text 'Search'.

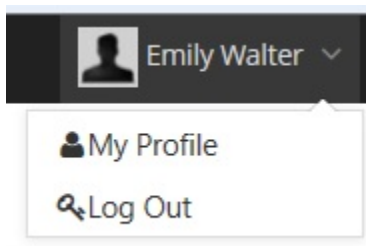
- Help
 - This icon will open a separate window containing the Help files created for Portal by JusticeTrax. These help files were created by the vendor for this application and were not created or altered by the laboratory (not currently available).

CONTROLLED DOCUMENT

The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated. Refer to the official electronic version in Qualtrax for current information.

8. My Profile

This icon is located in the upper right-hand corner of the Portal site and will take the user to their individual profile. Within their profile, they may update their contact information and change their password.



The laboratory can provide the LIMS-plus Portal User Guide ([QT179640](#)) for more detailed and/or additional information, if requested.

END OF DOCUMENT

CONTROLLED DOCUMENT

*The printed form of this document is an uncontrolled copy of a controlled document, and will not be automatically updated.
Refer to the official electronic version in Qualtrax for current information.*