MarinaBioLab
qPCR validation platform

User guide

Step-by-step instructions for the qPCR Workbench, the owner console and the MarinaBioLab Client Portal, for the lab's staff and clients.

PART 1

qPCR Workbench

For scientists. Add source files, map wells to studies, review results and sign the validation report.

PART 2

Owner console

For the lab's owner and admins. Run each client project: proposal, payments, checklist, team and report release.

PART 3

MarinaBioLab Client Portal

For clients. Accept your invitation, sign documents, pay, follow each step and download your report.

Covers the three sites

MARINABIOLAB QPCR VALIDATION PLATFORM

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START HERE

Quick start

A validation is the set of studies MarinaBioLab runs for one client, from the plan to the report. Each validation runs across 3 sites: one for scientists, one for the owners and admins who manage client projects, and one for clients. Start with the part for your site, then read the chapter on how the sites hand work to each other.

WHAT THIS CHAPTER IS FOR

Read this chapter first, whatever your role. It shows which of the 3 sites is yours, how you get access and how you sign in without a password. Then it follows one validation project across all 3 sites, from the proposal to the delivered report. When you finish, go to the part for your site.

Q.1

Who uses which site

qPCR Workbench

`www.mblvalidation.com`

MarinaBioLab scientists use the workbench, and lab admins can open it too. Only a scientist approves a report, prepares and signs its final copy (the stamped and signed client copy of the report), and signs result corrections.

You work through a validation here from start to finish. You write the plan and add the source files (the files you add to a validation, such as the instrument export of each run). You map groups of wells (the small compartments on the plate) to studies (a study is one study type, such as precision). Then you check the plate map (a picture of the plate with every well and its result), the results and the report.

Part 1

Owner console

`Address from an owner or admin`

The owner console is for the owners and admins whose email addresses are on the console's owner list.

You manage each client project here. Work in the console covers the proposal (the document for the scope and price), email invitations, and payments. Here you also handle the Pre-Check (the checklist a client completes before a validation), the team, and the report's release.

Part 2

MarinaBioLab Client Portal

`portal.mblvalidation.com`

The portal is for clients, the people at a laboratory that MarinaBioLab validates for.

You follow your project here. In the portal, you sign documents, pay, complete the checklist, and download your report.

Part 3

Q.2

Signing in to the three sites

You sign in without a password on each site. On the sign-in page, enter your email address, and the site sends you an email with a sign-in link and a code. Select the link in that email, or enter the code on the sign-in page. If you select the link, a page headed **Finish signing in** opens, where you select **Continue to sign in**.

Site	Who can sign in	How you get access
Workbench	Lab staff with the role **Scientist** or **Admin**.	An owner or admin invites your email address on the console's **Team** page and sends you the invitation message. The system makes your sign-in account, once the server is set up for it (section 2.15). You then sign in to the workbench with that same email address.

Site	Who can sign in	How you get access
Console	Owners and admins whose email addresses are on the console's owner list. The sign-in page can also ask for a 6-digit code from an authenticator app (an app that makes temporary verification codes).	A role on the **Team** page does not add you to the owner list. Because the owner list is part of the system's setup, ask the person who runs the lab's server to add your email address to it.
Portal	People at a client's lab (client contacts) who have accepted an invitation to a project.	MarinaBioLab sends you an invitation by email. Open the link in that email, sign in with the same email address that received it, and select **Accept invitation**.

Q.3

One validation project, from invitation to delivered report

The console tracks a validation project in 10 progress steps, and the portal shows that same project to the client under its own step names. Another project type, a lab build project, runs under a contract and has 5 steps of its own (section 2.14). A validation project usually moves across the sites in this order.

1	Console	An owner or admin selects **New project** to create the project, builds the proposal with the scope, price, and payment structure, and selects **Issue to client**. Next, under **Client access**, an owner or admin selects **Invite client** to invite the client's contacts by email.
2	Portal	The client opens the link in the invitation email, signs in, and selects **Accept invitation** on the page that opens.
3	Portal	The client's signer or primary contact reads the proposal and selects **Sign the proposal** to sign it. That closes the **Proposal signed** step in the console, which means the console marks it as done.
4	Console	Under **Team and activation**, an owner or admin selects **Set up and activate**. One press assigns the lab staff, publishes the engagement setup and activates the project, and the console shows first what it will record.
5	Portal	Once an owner or admin publishes the payment link, the client selects **Pay on Shopify** to make the initial payment. If the client pays by wire, check, or automated clearing house (ACH) transfer instead, an owner or admin records that payment in the console. Either way, the **Initial payment received** step closes in the console.
6	Console	When the client signs the proposal, the console drafts the Pre-Check (the list that the portal calls the checklist) from it. An owner or admin reviews the draft and selects **Approve, publish and assign**.

7	Portal	The client answers the checklist and selects **Sign and submit** to sign it. That closes the **Pre-Check signed** step in the console.
8	Workbench	The project's scientist books the kickoff meeting (the console has the same schedule form). The client then sees that meeting on the portal's **Schedule** tab. After the meeting, the scientist records the outcome **Held**, which closes the **Kickoff meeting held** step in the console.
9	Workbench	The scientist writes the validation plan (which sets out the validation studies) and selects **Issue to client**. Once the client signs it in the portal with **Sign the plan**, the **Validation plan signed** step closes in the console.
10	Console	Lab staff book the site visits to the client's lab and record each one. If the work is remote, an owner or admin marks the **Site visits** step as **Not needed**.
11	Workbench	The scientist runs the studies and works through the validation's 5 steps in the workbench: **Plan**, **Sources**, **Mapping**, **Plate and results**, and **Report**.
12	Workbench	The scientist generates the client copy of the report, prepares and signs its final copy (the stamped and signed version), and publishes it with **Publish to client portal**. In the workbench, the scientist links each validation to the project with **Bind to project**. Once every validation bound to the project has an approved client copy, the **Validation studies** step closes on its own in the console.
13	Portal	The client makes the final payment, which closes the **Final payment** step in the console.
14	Portal	The client opens the **Documents** tab and selects **Download PDF** to download the report.

WHOSE TURN IT IS

Each site tells you who acts next, in the same way. Most pages open with a box at the top. It says what is true now, what is needed from you, who holds the work (**Held by**) and what happens next. In the console a project's box can read **Your turn** or **With client**. In the portal it can read **Your turn** or **With MarinaBioLab**. On the workbench **Home** page, **Needs you** lists the validations waiting for a scientist.

Q.4

Reading the steps

Every procedure is a numbered list of steps, with one action per step. The 3 lines under each action tell you where to look on the screen, what appears next, and what to do if your screen looks different.

1. The first line is the action. Words in bold, such as **Email me a sign-in link**, are the exact words on the screen.

Where	The page, and the place on it.
You see	What appears when the action worked.
If different	The most likely other outcome, and what to do about it.

Each screen figure is a picture of the sites with made-up data. Your screen shows your own projects, names and dates, and its spacing can differ. A figure marked Diagram in its top corner is a drawing of the screen, not a picture.

PART 1

qPCR Workbench

The workbench is the site where MarinaBioLab scientists turn instrument exports (the files a qPCR instrument saves after a run) into a reviewed validation report. A validation is the body of studies for one client, for one panel or several (a panel is the set of targets a kit detects). Each validation moves through 5 steps, from the plan to the report. At the end, a scientist signs the final copy of the report. Then a scientist or an admin publishes it from the workbench to the client's project in the MarinaBioLab Client Portal (the client's site).

Who uses it	MarinaBioLab scientists. Lab admins can open the workbench too. Only a scientist can approve a report, prepare and sign its final copy, and sign result corrections.
Address	`www.mblvalidation.com`
You need	A staff account that the lab invited, and an up-to-date browser. A wide window is easiest, because on a narrow one the wide tables scroll sideways. Before you sign a report, ask the lab's owner or an admin to set your printed name in Team on the MarinaBioLab owner console.
Signing in	A link or a code sent to your email. There is no password.

WHAT THIS PART IS FOR

This part is for MarinaBioLab scientists, and for admins who test the workbench. It follows a validation through its 5 steps, from the plan to the published report, in the order you do the work. Each section is one task. When you finish, you can take a validation from a new plan to a report the client can download.

1.1

Sign in

> You are here: a web browser, not signed in. At the end you are signed in to the workbench and looking at **Home**. About 5 minutes.

The workbench does not use passwords. It emails you a sign-in link and a code, and you can use either one. Use the work email address that the lab invited.

1. Open `www.mblvalidation.com` in your web browser.

   Where Your browser's address bar.
   You see The page **Sign in to qPCR Workbench**.
   If different If **Home** opens, you are already signed in on this browser. You can go on to the next section.

2. Enter your work email address in **Work email**, then select **Email me a sign-in link**.

   Where The sign-in page.
   You see The heading **Check your email**, your email address and the field **Enter the code from the email**.
   If different If your email address has a typing mistake, you see **Enter a valid work email address.** Correct it and select **Email me a sign-in link** again. If the page shows the wrong email address, select **Use a different email**.

3. Open the email from the workbench and select the sign-in link in it.

   Where Your email inbox, on the same computer you are signing in on.
   You see A page headed **Finish signing in**, or the workbench itself if the link signs you in straight away.
   If different To use the code instead, type it on the page **Check your email** and select **Sign in with the code**. If no email arrives within 5 minutes, look in your spam folder, then select **Send a new sign-in email** on that page.

4. Select **Continue to sign in**.

   Where The page **Finish signing in**.
   You see **Home**, or the workbench page you tried to open before you signed in.
   If different If the link is too old or has already been used, the sign-in page shows **Sign-in could not be completed with that link. It may have expired or been used already. Request a new sign-in email below.** Type your work email address and select **Email me a sign-in link** again.

If another page opens after you sign in

Page	What it means	What to do
Workspace assignment pending	You are signed in, but your account is not in the lab's workspace yet. The page keeps checking, and it opens the workbench as soon as you are added to the team.	Ask the lab's owner or an admin to invite the email address shown after **Signed in as**. If the page stops checking after 10 minutes, select **Check again**. If the invitation went to a different email address, select **Sign out** and sign in with that one.
This workbench is for lab staff	Your account is not a staff account. A client's projects and reports are in the portal.	Select **Go to the client portal**. If you expected staff access, ask the lab's owner or an admin to change your role in the console. Then select **Sign out** and sign in again.

Scientists and admins

Both staff roles, scientist and admin, can open the workbench. A client account cannot. Only a scientist can approve a report, prepare and sign its final copy, and sign result corrections. For an admin, those buttons on Report stay grayed out, and the right rail reads **Only a scientist can sign.**, or **Only a scientist can prepare and sign the final copy.** while the final copy is still to be prepared. On Plate and results, the corrections panel reads **Only a scientist can sign or read signed corrections.** An admin can still accept or reject a results run, and publish a report that a scientist has signed.

Checkpoint: you see **Home**, with the rail of links down the left side. If all of this matched, you are done with this section.

1.2

Find your way around

> You are here: the workbench's **Home** page, signed in. At the end you know what the header, the rail and the 5 steps are for. About 15 minutes.

Home and the validation pages share the same header across the top and the same rail, a column of links down the left side. After you sign in, Home opens. It lists what is waiting for you, every validation and your client projects.

1 Select **Home**.

Where The left rail, the first entry.

You see The heading **Home** and a box at the top that says how many validations need you today. Below it, the tables **Needs you** and **With others** (work the server is running), then the section **Validations**.

If different If no validation is waiting for you, the table **Needs you** reads **Nothing needs you right now. Every open decision in your validations is recorded.**

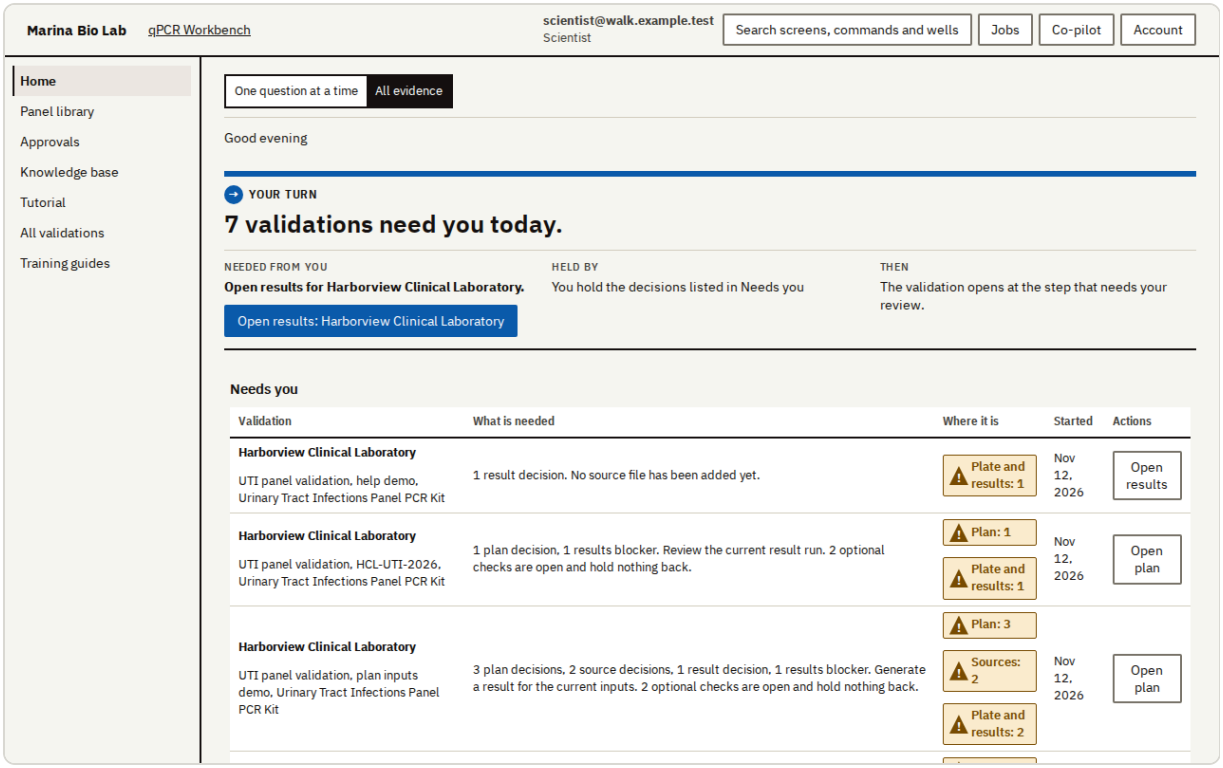


Figure 1.1 Home, with demo data. The number beside a step counts what holds that step back. The same number shows under Where it is in the table Needs you.

2 Find the row of the validation you want to work on, and read it.

Where The table **Needs you**.

You see The client and the validation, a sentence under **What is needed** that says what is open, and under **Where it is** each step that has open work, with a number or a status word. A number counts only what holds the work back. Optional checks are named apart and hold nothing back.

If different If a step shows a status word instead of a number: **Stopped** means the workbench could not read an instrument export, **Parsing** means it is still reading one, and **Ready** means a report is waiting for a scientist's approval.

3 Select the button at the end of the row.

Where The right end of the row. The button names the step, for example **Open mapping**.

You see The step that the button names, opened for that validation.

If different To open a validation that is not in this table, select its row under **Validations** further down.

The header

On the left of the header are the MarinaBioLab logo, with **qPCR Workbench** under it, which takes you back to Home, and the breadcrumb (the path to the page you are on). On the right are the search box **Search screens, commands and wells**, **Jobs**, **Co-pilot** (section 1.11) and a round button with your initials.

The round button opens the account menu. It has a line saying who you are signed in as, the links **Terms** and **Privacy**, a help line and **Sign out**. While a validation is open, it also has **Ask for help**, which sends a question about that validation to the owner console, and **Help requests on this validation** with their answers (section 1.11). Signing out clears this browser and asks the console and the portal to sign you out too, but a session already open on those sites can last until it expires. If the lab has not set a support email address, the help line reads **Need help? Ask the owner of this workspace.**

Jobs opens **Background jobs**: the uploads, file readings, calculations and report jobs the workbench is running for your validations. The button shows a count while jobs are running or waiting. Select **Retry** on a job that failed, or **Cancel** on one that is queued or running. Jobs keep running after you close **Background jobs**.

The left rail

Page	What it is for
Home	What needs you, the client projects you are assigned to, every validation and the background jobs.
Panel library	The panels in the lab's registry (its approved panel definitions), and every kit with its Instructions for Use (IFU, the kit maker's manual). A panel is the set of targets a kit detects.
Approvals	Sign-offs that need a qualified scientist to sign in and sign them personally.
Knowledge base	Reference records behind the lab's rules. It opens without the workbench header and rail.
Tutorial	The **Training guides**: written steps for the workbench, the owner console and the client portal. It opens without the workbench header and rail. Home has the same link, **Open the training guides**.
Standing decisions	Decisions kept for the client of the open validation. You see this entry only while a validation is open.
The card under **Current validation**	The validation you have open: the client, the validation's name and when it started. Select the card to open Plan.

The 5 steps of a validation

Under **Validation stages**, the rail lists all 5 steps in the order you work through them. You can open any step at any time, even one that is still waiting on an earlier step.

Step	What you do there
1. **Plan**	Build the plan, answer its decision cards (questions the workbench asks you) and record the plan inputs. The sheet that reviews every proposal at once (section 1.6) and the equipment and kit record (section 1.4) are here too.
2. **Sources**	Add the instrument exports, record the reagent lot and answer the decision cards about the runs.
3. **Mapping**	Confirm which study each group of rows from the source files belongs to. The workbench proposes a study where it can. The page heading calls this page **Mapping review**.
4. **Plate and results**	Look at the wells of the current results run (a results run is one calculation of the results), check each study against its acceptance criteria (the pass rules in the plan), record decisions and confirm the results. Two buttons switch between **Plate map** and **Results**.
5. **Report**	Generate, read, sign and publish the report.

After each step's name the rail shows a word for its state, and sometimes a number and a short note.

Beside a step	What it means
Done	Every part of the step is reviewed or approved.
Running	The workbench is working on the step, for example reading files on Sources.
Needs you, with a warning mark and a number	The step needs you. The number counts the open cards and problems on that step that hold the work back.
A note that starts **Waits for**	The step waits only for an earlier step, which the note names.
A note such as 2 optional checks	Open checks that hold nothing back. They are not counted in the number.
Available	You can start the step.
Not open yet	The step cannot start yet.

Most steps have a Guide. Select **What do I do here?** on the step to read where to start and what is still open there.

Home

Needs you has one row for each validation with open work. **With others** lists the work the server is running for you, such as a file being read. **Validations** lists every validation, with **Search validations**, the list **Filter validations** (**All**, **Needs you**, **In progress**, **Approved** and **Archived**) and **Sort validations**. Home checks the status of the 12 most recent validations. An older one shows **Open to see status** until you open it.

To archive a validation (put it away), open the menu button (three dots) at the end of its row, select **Archive**, and confirm with **Archive** in the row. If a job for that validation is queued or running, the

row says that archiving must wait. You can archive it once the job finishes. An archived validation keeps every record and takes no new jobs. To work on it again, select the **Archived** filter, open the row's menu and select **Unarchive**.

Keyboard shortcuts

Keys	What they do
`Ctrl` + `K` (Mac: `Cmd` + `K`)	Open or close search. Type a page name, or a well such as A5 while a plate is loaded.
`Esc`	Close the open dialog, side panel or menu. If you typed something in a dialog, the browser first asks **Discard what you typed in this dialog?**
`Ctrl` + `Enter` while you edit a section's wording on Report	Save the wording. `Esc` cancels the edit.
Arrow keys on the plate map	Move between wells. `Enter` or `Space` selects the well.

Checkpoint: you opened a validation from **Needs you** and found its steps in the rail on the left. If all of this matched, you are done with this section. Take a break before the next one.

1.3

Start a validation

> You are here: the workbench's **Home** page. At the end a new validation exists and its Plan page is open. About 10 minutes.

A validation holds the plan, the source files, the results and the report for one client. It covers the planned studies, such as limit of detection (LoD) or precision. Start one when the client's project is ready for lab work.

1 Select **New validation**.

Where Home, to the right of the heading **Validations**.

You see The dialog (a small window) **Create a new validation**.

If different If the dialog shows **Loading client projects.**, wait for the list to appear.

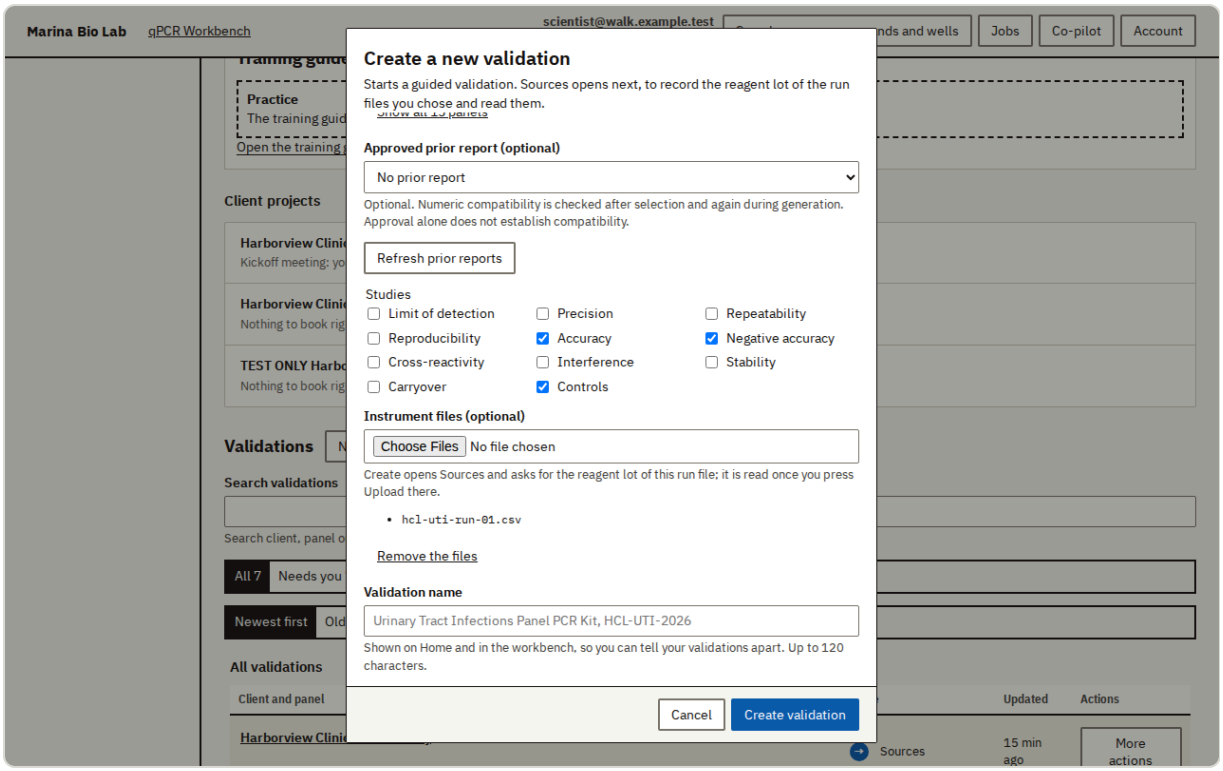


Figure 1.2 The dialog, with demo data. **Instrument files (optional)** takes the run files now. The box **Offer the plan answers of** shows when an earlier validation of the panel exists. The last card under Client project is always No client project.

2 Under **Client project**, select the client's project.

Where The top of the dialog. Each card shows the client's name and the project's identifier.

You see A note that says what the dialog took from the proposal (the document the lab sent the client) or from the project. A line that starts **Reports are prepared for** names the client.

If different If there is no client project to choose, the dialog shows **No client project is active or has an issued proposal yet.** Ask the lab's owner or an admin to activate the project or issue its proposal. Or select **No client project**, and bind (link) the validation to its project before you publish.

3 In **Panel**, choose the panel you are validating.

Where Below the project cards.

You see The panel's name in the field. For a client project, the list shows only that project's panels.

If different If you see **This panel is not in the project's proposal.**, **Create validation** stays grayed out. Choose a panel named in the proposal.

4. Under **Studies**, check the box for each study you will run, and clear the box for any study you will not run.

   Where Below **Panel**.
   You see A checked box for each study you will run. To begin with, the boxes are checked for every study the panel supports, or for the studies in the project's proposal.
   If different If no box is checked, the bottom of the dialog shows **Choose at least one study.** Check at least one.

5. If you have the run files already, choose them under **Instrument files (optional)**.

   Where Below **Studies**.
   You see The names of the files you chose, under **Files to add**, and a line that says what **Create validation** will do with them. Nothing is sent yet.
   If different To add the files later, leave this empty: the line reads **You can add the instrument files now or later, on Sources.** To take back the files you chose, select **Remove the files**.

6. Type a name in **Validation name**.

   Where The last field of the dialog.
   You see The name you typed. It can be up to 120 characters.
   If different If you leave the field empty, the workbench uses the suggestion shown in gray: the panel's name and the project's identifier.

7. Select **Create validation**.

   Where The bottom of the dialog.
   You see The Plan page of the new validation, and the message **Validation created. Its plan decisions are on this screen; add source files any time.**
   If different If you chose run files in step 5, Sources opens instead, with the window **Record the reagent lot** for those files (section 1.5). If the workbench gets no confirmation, it shows **No answer came back, so the workbench could not confirm whether this validation was created. Check Home before you create it again: it may already be there.** Look for the validation on **Home** first, so you do not create it twice.

What the client project decides

The project you choose decides which client the reports are prepared for. The card says **Standing decisions and publication apply only to this client.** You can publish the report only to that client's project in the portal, and decisions you keep for later apply to that client alone. Plan then shows the block **From the proposal and Pre-Check**. It compares what the proposal and the Pre-Check say with what the uploaded files show. The Pre-Check is the list of questions the client fills in before the validation starts. The portal calls it the checklist.

If you choose **No client project**, the validation does not belong to any client project until you bind it, and the workbench records the laboratory name as MarinaBioLab instead of the client's name. The workbench asks you to bind the validation before you publish, and records the binding with your reason. If the client project already exists, choose it when you create the validation. Once a validation is bound to a client project, you cannot change that binding in the workbench.

In the same dialog, **Approved prior report (optional)** lists reports already approved for the same client and panel. This list stays grayed out until you choose a client project. If you choose a report,

also choose its **Recorded reference instrument serial**, because **Create validation** stays grayed out until you do.

When you validated the same panel before, for the same client project, the dialog also shows a box that starts **Offer the plan answers of** and names your newest such validation. It starts checked. Keep it checked to see that validation's plan answers as proposals on Plan. Nothing is recorded until you record the plan inputs yourself. A client project's page in the workbench also has **New validation for this project**, which opens this dialog with the project already chosen (section 1.12).

Checkpoint: you see the Plan page and the message **Validation created. Its plan decisions are on this screen; add source files any time.** If all of this matched, you are done with this section.

1.4

The plan

> You are here: the workbench, with a validation open. At the end the plan is built, its decision cards are answered and its inputs are recorded. About 20 minutes.

Plan is the first stage. It lists the panel's targets (what the kit detects), the planned studies and the plan inputs (values the calculation needs from you). Work through it right after you create the validation. Come back whenever the rail on the left shows a number beside **Plan**.

Much of the work in the workbench is answering decision cards. A decision card is a question the workbench cannot settle by itself, so it asks you. You find cards under **Plan decisions** on this page, under **Run decisions** on Sources, in Mapping review and under **Laboratory rules and run decisions** on Plate and results. Each card shows a tag (**Needs decision**, **Confirmed** or **Waiting**), a title and a one-line summary. An open card also says why it is asked, what happens after you record it, and whether it holds anything back. Where the lab's records state a usual answer, the card shows it under **Usual answer**, and the option is marked **Lab default** or **Usual for this lab**. Nothing is chosen for you. The workbench writes the question and its options for each validation, so the cards are different in every validation.

Once every file is read, Plan also shows the card **Review everything at once**. It lists every open decision the workbench can propose an answer for, from Plan, Sources, Mapping and Plate and results, so you can review them and record them with one press. Section 1.6 shows how. You can also answer each card on its own, as below.

Build the plan and answer its decision cards

1. Select **Plan**.

   Where The left rail, under **Validation stages**.

   You see The heading **Plan** at the top, then the panel card, **Targets on this plate** and **Studies** below it.

   If different If you created the validation a moment ago, this page is already open. Go on to the next step.

2. If you see a box headed **No plan yet**, select **Build the guided plan** inside it.

   Where Plan, inside the box **No plan yet**.

   You see The message **Guided plan saved. Answer its plan decisions below.**

   If different Most new validations already have a plan, so you do not see this box. In that case, go to the next step.

3. Find a card tagged **Needs decision** and select **Decide** on it.

   Where Under the heading **Plan decisions**.

   You see The card opens. It shows the question, then the options under **Choose one** or **Choose all that apply**. Select **Why this is asked** to read why the workbench needs this answer.

   If different A card may already be open. That is normal: the first card that needs a decision opens by itself. An open card shows **Close** in its header instead of **Decide**. To ask about a card, select **Ask the co-pilot about this decision** (it puts a question in the co-pilot's box, and you send it) or **Ask for help with this card** (section 1.11).

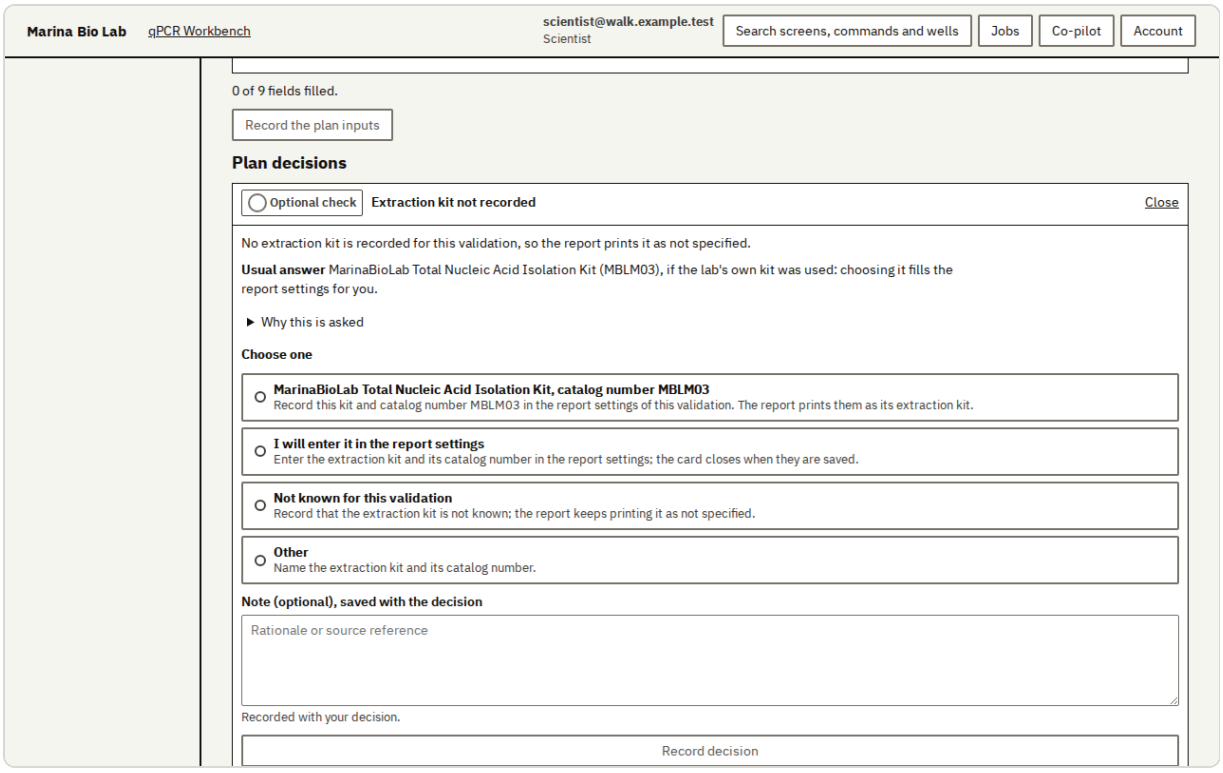


Figure 1.3 The Plan page with one decision card open.

4. Choose the option that applies, or every option that applies, then type your reason in the note field below them.

   Where The open card.
   You see Your choice is marked, and your note is in the field.
   If different Some cards ask for values instead of a choice. If you see fields under **Enter the missing values**, type the missing plan values there. To know whether a note is required, read the note field's label. For example, **Scientific rationale (required)** means you must write one.

5. Select **Record decision**.

   Where The bottom of the card.
   You see The card's tag changes to **Confirmed**. It may show **Waiting** for a while first, while the workbench rebuilds the rows with your answer. A message appears that ends with **Recorded in the review ledger.** The review ledger is the validation's record of decisions.
   If different If the button is grayed out, read the line beside it. It tells you what is still missing, for example **Choose an option above to confirm.**

> **CHECK FIRST**
> Read your answer again before you record it. The card warns **Check your choice first: once recorded, it cannot be changed here.** If you record a wrong answer, the fix is to start a new validation with the same files. The exceptions: the study of a sample group (Mapping review, **Change the study**, section 1.6), a confirmed report scope (**Change report scope**), and the equipment and kit record, which asks again when something it depends on changes.

Record the plan inputs

The workbench cannot find every value it needs in the files. Some must come from you, such as the stability timepoints. Every open plan input is listed in one form, **Plan inputs to record**, with one group of fields for each input. Under each field a line says whether the calculation reads the value (**The calculation reads this value.**) or keeps it as the record of the plan.

Under an empty field, the workbench may list a proposal: a value it found in your files (for example the names of the LoD groups), in your last validation of the same panel, or in the client's proposal, each with its source. Select **Use** beside a proposal to put it in the field. A button such as **Use all 3 proposals** puts each proposal in its field at once. When a field has more than one proposal, the button reads, for example, **Use 3 of 5 proposals**, and that field is left for you to choose. A proposal fills a field only as a draft: check it.

Type the other values. Write "none" where nothing applies. Then select **Record the plan inputs**. One press records every filled field in one new plan version. An input with an empty field stays open and listed, so you can come back to it later. If the workbench cannot record a value, a line starting with **Not recorded.** gives the reason. Correct the value and record again. To change an input you already recorded, open it under **Plan inputs**, select **Change** and save it with **Save to the plan**.

Lower on the page is **Handling preset**. A preset is a named set of handling rules for the report. Choose one in **Preset** and read the table of rules under it. Then select **Use this preset for this validation**. Every report you generate after that uses this preset, until you select **Use the panel standard**.

Defer a study this round

Sometimes you are not ready to evaluate one of the planned studies. You can hold its rows out of this round of calculation and still keep the study in the plan. Go to **Scope for this round**, at the bottom of the **Studies** table. Check the study's box, type your reason and select **Save study decision**. The calculation leaves those rows out until you uncheck the box, type a reason and select **Save study decision** again. The message that confirms your choice tells you to recalculate. There is one exception. If you defer **Controls**, the workbench records your decision, but the control wells still count, because they decide whether a run is valid.

The equipment and kit record

The workbench keeps an internal record of the equipment and the kit lot behind the runs: the PCR instrument and its serial number, its calibration and service dates, the extraction instrument and the kit and its lot. This record is for the lab's own files: the client does not see it. The card **Equipment and kit record** is asked last, under **Plan decisions**, once every other decision that holds results back is recorded. Results are calculated only after it is recorded, and a report cannot be approved until it is.

1. Select **Decide** on the card **Equipment and kit record**.

   Where Plan, under **Plan decisions**.

   You see One line per fact. A fact on record shows its value and where it came from. A fact with nothing on record reads **Not provided**.

   If different If the export files name the instrument and its serial number, the card offers **Use the instrument named in the export files**. Select it to take those facts. If the files disagree, the card says **The export files do not agree, so nothing is taken from them.** If the lab already keeps a record of its instruments, the card shows it under **Equipment on record for the lab**.

2. For the lines that read **Not provided**, select **Not on record for this validation**, or type your own reason.

   Where The box **Reason for the lines that read Not provided**.

   You see One reason in the box. It covers every line that reads Not provided, and you can edit its words.

   If different To correct a single fact instead, use the line's own **Correction** field. If every line already has a value, the card reads **Every line has a value on record or a correction. If they are right, record that you checked.**

3. Select **Record the equipment and kit record**.

   Where The bottom of the card.

   You see The card reads **Confirmed**. If you recorded the other decisions with **Record all** on the one-review sheet (section 1.6), the calculation now starts by itself. Otherwise start it yourself (section 1.8).

   If different If the card comes back later, something it depends on changed: the plan, the files, the client's documents, the report settings, the kit catalog or the panel registry. Your last answer is filled in where it still applies. Check it and record it again. Recording it sets aside results already calculated, so calculate again.

Under **Remember for the lab**, a box such as **Remember this PCR instrument for the lab** saves the instrument with its serial number, so the next validation run on the same instrument offers these

lines. It is optional.

Checkpoint: every card under **Plan decisions** is tagged **Confirmed** or **Waiting**, and the rail shows no number beside **Plan**. If all of this matched, you are done with this section. Take a break before the next one.

1.5

Sources

> You are here: the workbench, with a validation open and the instrument exports from your runs saved on your computer. At the end every file is uploaded and read, and its run decisions are answered. About 15 minutes.

Sources is where you add the files from the instrument, once the runs are done. Each file you add is a source file. A source file that holds a run's results is called a run file. The workbench checks and reads each file in the background, and it never edits your files.

The page lists the files you can upload: **CSV, XLSX, RDML/XML or EDS, plus figure images. Up to 10 MB per file.** It also gives these rules for names: **File names take plain keyboard characters only, with no accents, micro signs or long dashes.** and **Sample names and file names must not identify a patient. Use the laboratory's sample codes.**

Add source files and record the reagent lot

1. Select **Sources**.

   Where The left rail, under **Validation stages**.
   You see The heading **Sources**, the drop area (a box you can drag files onto) and the table of files.
   If different If you have not added any files yet, the table reads **No source file yet. Add instrument exports above; each is parsed in the background.**

2 Select **Choose files**, then pick the files on your computer and open them.

Where The drop area **Drop instrument exports here**, at the top of the page.

You see The dialog **Record the reagent lot** opens. It asks which batch (lot) of the kit you used for these runs.

If different If you chose the files in the New validation dialog, this window is already open for them. If a file is too big, the workbench refuses it and shows a line that ends **The largest file an upload can take is 10 MB, so it was not uploaded.** If you chose only figure images, there is no dialog. The workbench uploads them straight away.

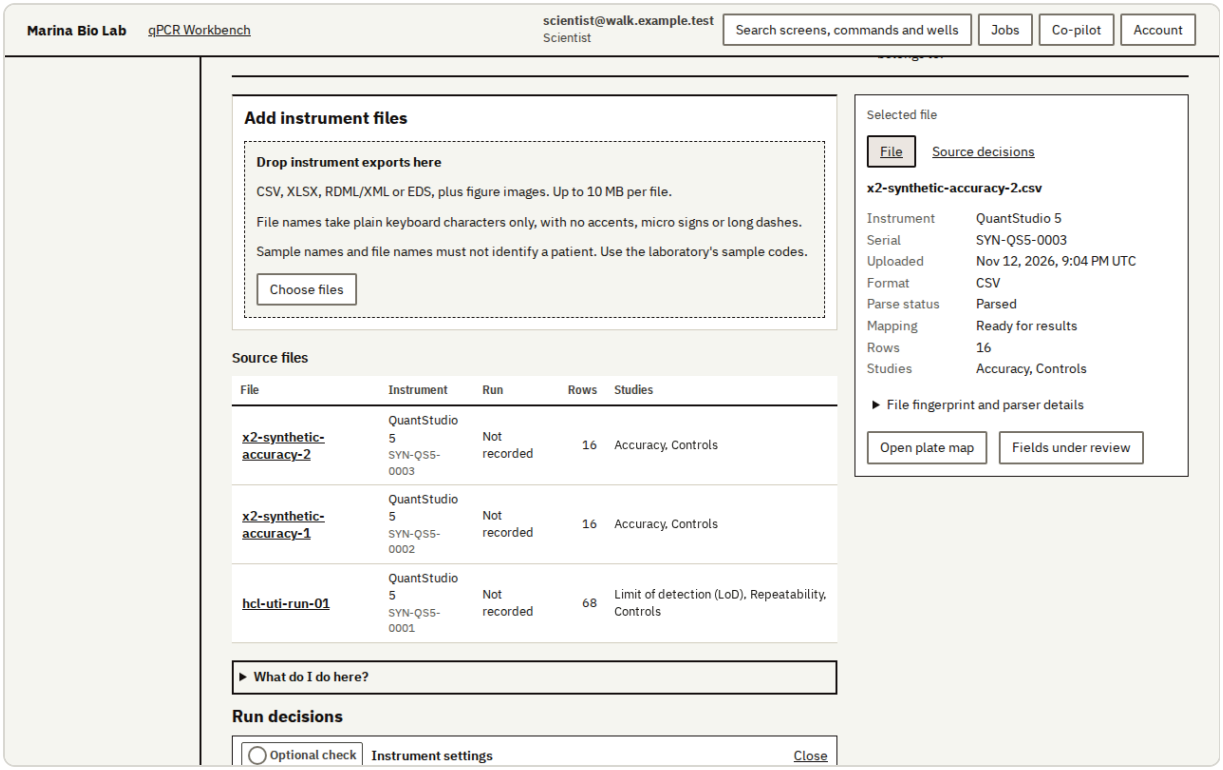


Figure 1.4 The Sources page, with demo data. Select a row to see that file's details and source decisions in the pane on the right.

3 Select **Enter the lot**.

Where The lot choices in the dialog.

You see The fields **Kit catalog number**, **Lot number** and **Expiry date (optional)**.

If different If this validation already recorded a lot for this panel, you see **Use the previous lot** and **Enter a different lot** instead. A lot recorded in another validation is offered only marked as such, and is never chosen or typed in for you. The kit catalog number can be offered under **Proposed kit catalog numbers**, from the panel registry or the signed proposal, each with its own button. If you cannot find out which lot was used, select **Lot unknown** and type why.

4. Type the kit catalog number and the lot number from the reagent box, and add the expiry date if you have it.

   Where **Kit catalog number**, **Lot number** and **Expiry date (optional)**.
   You see The upload button at the bottom of the dialog can now be selected.
   If different The dialog records one lot for all the files in this upload. If your files come from different lots, select **Cancel** and upload them in separate batches, one lot at a time. If the validation has several panels, choose the panel first.

5. Select **Upload**.

   Where The bottom of the dialog.
   You see A message that ends **uploaded. Parsing runs in the background.** Parsing means the workbench is reading the file. Each file now has a row in the table.
   If different If the workbench refuses a file, a red note names the file and gives the reason. If the workbench cannot confirm that a file arrived, that file gets a button to try the upload again. If a file is refused because of its lot, the lot dialog opens again at the field you need to fix.

6. Wait until the **Status** column reads **Parsed**.

   Where The table of files.
   You see While the workbench reads a file, a progress bar shows the percentage done. When it finishes, the status reads **Parsed**.
   If different If you see a different status, select the file's row. The pane on the right explains what happened and what to do next. The table below lists every status.

Status of a file	What it means	What to do
Parsed	The workbench read the file.	Nothing.
Parsed with warnings	The workbench read the file and noted a warning about it.	Select the file and open **File fingerprint and parser details** to read the warning.
Parse failed	The workbench could not read the file.	Upload the file again. To finish the validation without this file, exclude it by giving an exclusion reason under **Source decisions**.
Not a run file	The workbench found no table of Cq (quantification cycle) results in the file.	Export the run results from your instrument software as a CSV file and upload that. Then exclude the first file.
Needs re-pin	The validation started on an older version of the calculator (the software that computes the results) than the lab runs now.	Go to Plate and results, select **Recalculate**, then select the button that names the new version. The workbench then reads the files again.
Reading canceled	Someone canceled the reading job before it finished.	Select **Jobs** in the header at the top of the page, then select **Retry** on this file's job.

Status of a file	What it means	What to do
File verification failed	The copy the workbench stored does not match the file you uploaded.	Email the address in the help line of the account menu (the round button with your initials), and include the file name. If the help line shows no address, ask the lab's owner or an admin.
Figure ready, **Baseline reference ready**, **Ready**	The file is ready. It has nothing for the workbench to read, for example a figure image.	Nothing.
Superseded, **Partly superseded**, **Held**, **Excluded**, **Partly excluded** under the status	A source decision (a decision about this file) is recorded. A repeat run replaced all or part of the file, or the file is waiting for you to say which copy counts, or you excluded all or part of it.	For **Held**, select the file, then **Source decisions**, and choose which copy counts.

Answer run decisions

Sometimes a file raises a question that only you can answer. A bar above the table then shows how many run decisions are waiting. Select **Decide** in the bar to go to **Run decisions**. Answer each card the same way as on Plan (section 1.4): choose your answer, type your note and select **Record decision**. A card tagged **Waiting** has your answer recorded, but the answer has not taken effect yet.

Replace or exclude a file

The workbench never deletes a source file. Instead, you tell it which files count. If a newer file replaces an earlier one, do steps 1 to 3 on the newer file's row. To leave a file out instead (exclude it), do steps 1, 2, 4 and 5 on that file's row.

1. Select the file's row.

   Where The table of files on Sources.
   You see The pane **Selected file** opens on the right, with the tabs **File** and **Source decisions**.
   If different If you do not see the tabs, there is no decision you can make for this file.

2. Select **Source decisions**.

   Where The pane on the right.
   You see The fields **Replaces**, **Exclusion reason** and **Only these wells, rows or samples**.
   If different If the workbench held the file because it may be a repeat of another run, the pane lets you mark the earlier file as replaced (superseded), or choose **Keep both as distinct runs**.

3. To replace an earlier file, choose that earlier file in **Replaces**.

   Where The **Source decisions** tab.
   You see A message says this file now replaces the earlier one. The workbench marks the earlier file **Superseded**. You do not need to do anything else for a replacement.
   If different To undo a replacement, choose **Nothing** in the same field.

4. Type your reason in **Exclusion reason**.
   - **Where** The **Source decisions** tab.
   - **You see** Your text in the field.
   - **If different** To exclude only part of the file, also list the wells, rows or samples in **Only these wells, rows or samples**. Leave that field empty to exclude the whole file.

5. Select **Save exclusion**.
   - **Where** Below the fields.
   - **You see** A message says the exclusion is saved. It ends with **Recalculate on Results to apply it.** The exclusion counts only after you recalculate.
   - **If different** If the workbench cannot understand what you typed in the wells field, you see **Write a well range within one row, such as A1-A3, or list the wells separated by commas.** Fix the entry and save again.

Checkpoint: each file has a row in the table, and the **Status** column reads **Parsed**. If all of this matched, you are done with this section.

1.6

Mapping review

> You are here: the workbench, with a validation open and its source files read. At the end every group of rows is routed to a study. About 15 minutes.

Mapping means deciding which study each row of data belongs to. A study is one type of test in the validation, such as precision or limit of detection (LoD). The workbench groups the rows from your files by sample name, and routes (sends) each group to a study when a rule settles it. For a group it cannot route, it proposes a study when it has a reason, and shows the reason as the basis: for example a control word in the sample name, a group you already decided with the same name, a standing decision, or the sample name itself naming one study. You check the proposals and record them together. Results use every routed group.

There are two ways to record the proposals. On Mapping review you record the groups' studies only. On Plan, the card **Review everything at once** records every proposed decision of the validation in one sheet, then asks for the equipment and kit record and starts the calculation. Both are below.

Record the proposed studies on Mapping review

1. Select **Mapping**.
   - **Where** The left rail, under **Validation stages**.
   - **You see** The heading **Mapping review** and the box at the top, which says how many groups need your decision and how many have a proposed study. The page opens one group at a time.
   - **If different** If the workbench has not read any source file yet, the box says **There are no sample groups to review.**

2 In **Reading view**, choose **All evidence**.

Where The top of the page, beside the card of the current validation.

You see The table **Sample groups**. A proposed row shows the study followed by the word proposed, for example LoD, proposed, with its basis under it, and a tick.

If different To see fewer rows, choose **Needs you** in **Filter sample groups**.

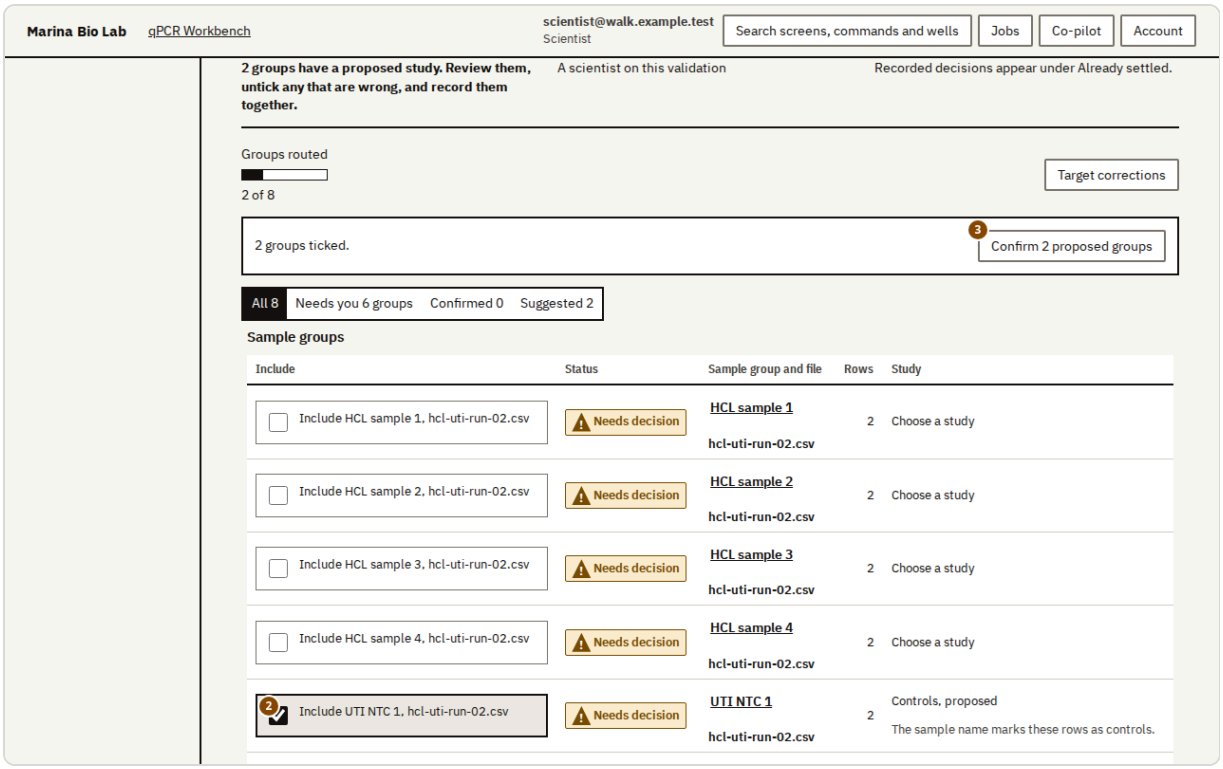


Figure 1.5 Mapping review in All evidence, with demo data. Rows a rule proposes start ticked (2). The button above the table counts the ticked groups (3).

3 Read each proposed row, and fix the ticks.

Where The table **Sample groups**.

You see Rows a rule proposes are ticked when the page opens. Rows the co-pilot proposes are never ticked for you. Select a row to see its file and **Example rows from this group** in the pane **Selected group** on the right.

If different A proposal that would change a study the group already has is listed apart, unticked, under **These would change the study the files gave**. Read each of those rows, then tick them one by one, or all at once with the tick above them, for example **Tick all 3 groups that would change their study**. A proposal toward the study the lab's signed source routing already gave is not a change, and starts ticked.

4 Select the button that confirms the ticked groups, for example **Confirm 12 proposed groups**.

Where Above the table, beside the line that counts the ticked groups.

You see The sheet **Review the proposed studies**, with each ticked group, the study it will record and its basis. Groups that change a study are listed in their own table.

If different When some ticked groups change a study, the button says so, for example **Confirm 12 proposed groups: 9 new, 3 change a study**. To leave the sheet without recording, close it.

5. Select the button that records them, for example **Record 12 decisions**.

   Where The bottom of the sheet. The field **Note (optional), saved with every decision** is above it.

   You see The groups read as recorded. Each group is its own decision in the review ledger, under your name. A message says the source rows are being read again, so groups and counts can change for a moment.

   If different If the server refuses one group, nothing is recorded, and the sheet names the group and the reason. Fix or untick it, then record again. If the groups changed while you were reviewing, the sheet says so: review them again.

Review everything at once, on Plan

This sheet takes every proposal of the validation, not only the studies. It opens once every file is read.

1. On Plan, select the button that reviews the proposals, for example **Review 14 proposals**.

   Where The card **Review everything at once**.

   You see The sheet **Review the proposals**. Its rows are in groups, such as **Plan inputs**, **Source decisions**, **Each group's study** and **Results decisions**. Each row shows its answer and its basis.

   If different If the card reads **The sheet opens once every file is read.**, wait until Sources reads **Parsed** for every file. The button shows only while something is proposed.

2. Check each row. Untick a row to leave it out, or change its answer.

   Where The sheet.

   You see A row that a rule supports starts ticked. A row that would move a group to another study starts unticked, under **Changes a group's study**, with one tick at the top of that group.

   If different A row with a button that starts **Answer on its card on** is not sent from here: answer it on its own card. A row may ask for a note before it can be recorded.

3. Select **Review what will be recorded**, read the requests, then select **Record all**.

   Where The bottom of the sheet.

   You see The sheet **What will be recorded**, with each request in the order it is sent. After Record all, each decision is recorded under your name, then the sheet shows what comes next.

   If different A request is all or nothing: if the server refuses one decision in it, nothing in it is recorded, nothing after it is sent, and your ticks are kept.

4. Do what the sheet names next.

   Where The sheet, after Record all.

   You see The sheet says that decisions are recorded first, then the equipment and kit record, then the calculation. If the equipment and kit record is asked, fill it in in the sheet and select **Confirm the Equipment and kit record**. Once it is confirmed, the calculation starts by itself, even with the sheet closed. If a card that holds nothing back is still open, such as the report scope, the sheet names it and says it does not hold the calculation back.

   If different If a decision is still open, the sheet says so: select **Open the open decision** and record it on its card. If no record is asked, select **Start the calculation**. Opening the sheet again, or leaving the validation, cancels the calculation that would start by itself: then start it yourself (section 1.8).

Route a group yourself

For a group with no proposal, select it, choose its study under **Route this group to**, and select **Confirm mapping**. A note is optional. If a line above the table then offers **Apply the mapping and calculate**, select it to start the calculation. Control wells, such as the no-template control (NTC, a well run without any sample), go to **Controls**. To give several selected groups one study, tick them and select the button that starts **Assign a study to the**.

Accept or reject a suggestion

Some groups show **Accept suggestion** and **Reject suggestion** in the **Selected group** pane. Such a group is a proposed correction, and it counts only after you accept it. Before you decide, read the suggested wording in the block **Co-pilot draft (review before you rely on it)**, above the 2 buttons. Select either button, type your reason in the box that opens, then select the same button again under the box. A message confirms that the workbench mapped the group to the study, or that it recorded your rejection. **Cancel** leaves the group undecided. On an archived validation, **Accept suggestion** cannot be selected, and the pane explains why.

Groups under the filter **Suggested** are a different case. The workbench routed them from the file, and the results already use them. Change one only if its study is wrong.

Change the study of a recorded group

1. Select the group, then **Change the study**.

   Where Mapping review, the pane **Selected group**, or the group's row.

   You see The sheet **Change the study of** the group, with the decision on record, who recorded it and when. Nothing is chosen for you.

   If different The button shows only when the server offers the change. Otherwise the pane says why. If the workbench routed the group from its file, the button opens the block **Change the study** in the pane instead: check the studies, type your reason in **Why this study applies** and select **Save study correction**. On an accepted correction you see **Review or undo** in place of **Change the study**. It opens the drawer **Target corrections and row review** (a panel that slides in).

2. Choose the study or studies this group counts in, and type why in **Why the study changes**.

   Where The sheet that opened. The reason is one line, and it is required.

   You see Under **What happens when you record it**, what recording does, for example that a confirmed report scope ends and that a client copy already published stops downloading until you publish a new one.

   If different The record button stays grayed out until you choose a study and type a reason. A line under the reason says what is still missing.

3 Select **Record the change**.

Where The bottom of the sheet.

You see A message that names the group and its new study and says it is recorded in the review ledger with your reason. The earlier decision stays in the group's history. Recalculate to apply it.

If different If the workbench refuses the change, it says why in the sheet and records nothing. What you typed is kept.

Checkpoint: with **Needs you** chosen in **Filter sample groups**, the table reads **No groups need your decision.** If all of this matched, you are done with this section. Take a break before the next one.

1.7

Plate and results: the plate

> You are here: the workbench, with a validation open and its results calculated. At the end you can find any well on the plate and read its values. About 10 minutes.

The plate is the first part of the step **Plate and results**. The **Plate map** is a picture of the plate. It shows every well of the current results run, with its sample, the Cq of each target and the call (the result the calculation gives the well). You can look, but you cannot change a value here. Use it to check a well that is flagged for review, or to see where a value came from.

1 Select **Plate and results**, then **Plate map**.

Where The left rail, under **Validation stages**. The buttons **Plate map** and **Results** show under the rail while this step is open.

You see The grid of wells laid out like the plate, a key under **What the marks on a well mean**, and, when some wells are flagged, the list **Wells that need you**.

If different If no well waits for you, you see **No well in this run is waiting for your decision.** If there is no current results run, calculate first (section 1.8).

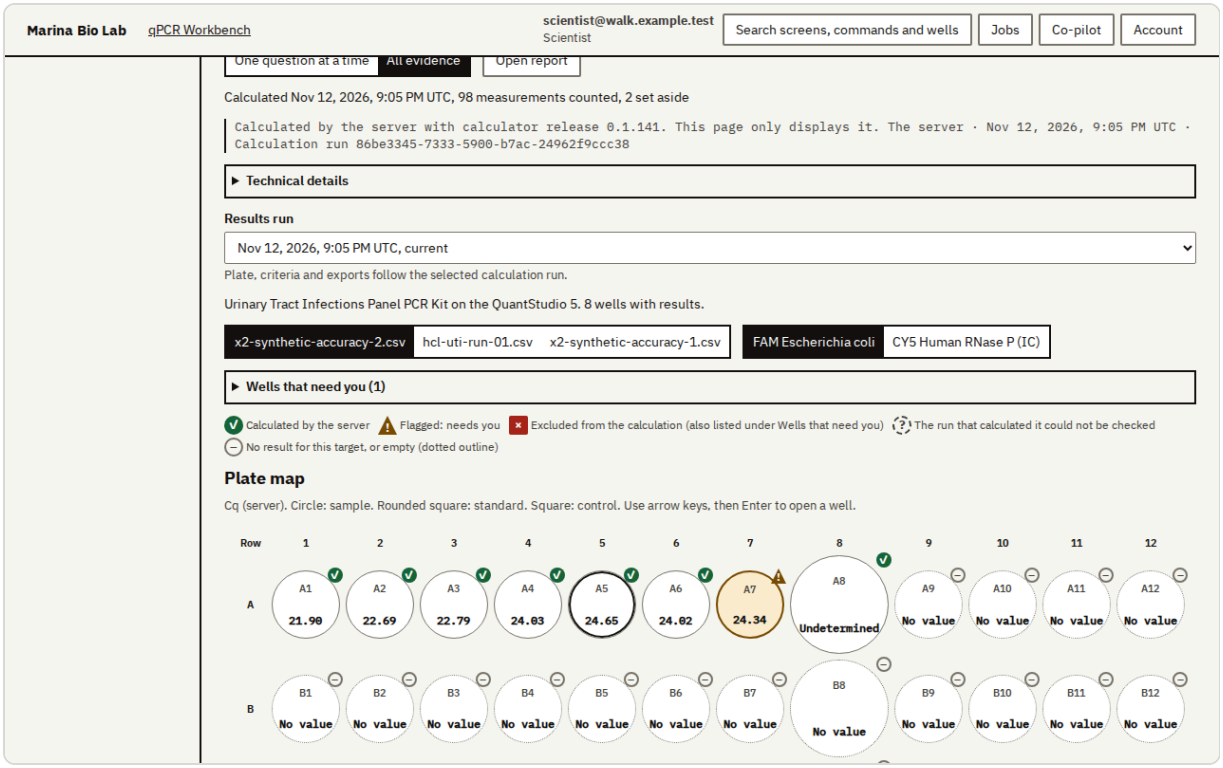


Figure 1.6 Plate and results, with demo data. Wells that need you lists the flagged wells.

2 Choose a well under **Choose a well to review**, or select a well on the plate.

Where The list **Wells that need you** lists the flagged wells. Any well can be chosen on the grid.

You see The panel **Selected well**, with the table **Results in this well** (each target with its Cq and call), any flags, the amplification curves and, under **Source**, the source file with its rows.

If different If the run has more than one plate, reaction mix (oligo mix, the mix of primers and probes) or channel, choose it first in **Run**, **Oligo mix** or **Channel** above the plate.

3 To ask the co-pilot about this well, select **Ask co-pilot**.

Where The panel **Selected well**.

You see The co-pilot opens with a question about that well already typed in, ready to send.

If different To see the well's source rows as the workbench read them, select **Fields under review**. To record an exception for this well, select **Record an exception**: the drawer opens with the well's target, file and rows offered, and nothing is filled until you use them.

Checkpoint: you chose a well, and the panel **Selected well** shows its targets with their Cq and call. If all of this matched, you are done with this section.

1.8

Plate and results: the results

> You are here: the workbench, with a validation open and its groups mapped. At the end the results are calculated, the criteria that need a scientist have decisions, and the run is accepted or rejected. About 30 minutes.

The rest of **Plate and results** shows the calculated results for the mapped rows. There is one tab for each study, with the **Acceptance criteria** (the pass rules from the plan). Run decisions sit in the card **Laboratory rules and run decisions** beside the plate. Each calculation creates a new results run. So after any change to sources, mapping, scope or corrections, recalculate. Then record the decisions that need a scientist, and accept or reject the run.

Recalculate and read the results

1. Select **Plate and results**, then **Results**.

   Where The left rail, under **Validation stages**, then the buttons under the rail.
   You see The results, a line that names the run they come from (**Calculation run** and a number) and the study tabs.
   If different If nothing has been calculated yet, you see **No results run yet. Values appear here once results are calculated.** Go on to the next step.

2 Select **Recalculate**.

Where The buttons to the right of the heading.

You see A message says the recalculation is queued (waiting its turn). The results on the page update when the calculation finishes.

If different If the results are already up to date, you see **No recalculation needed: a results run already exists for the current inputs.** If the calculation cannot run yet, the page says why before you press: decisions that hold results back are still open (it counts them and offers a button such as **Open Plan**), or **Confirm the Equipment and kit record on Plan. Results are calculated after you confirm it.** If something else stops the calculation, a red block under the buttons names the problem, with a button that opens the page where you can fix it.

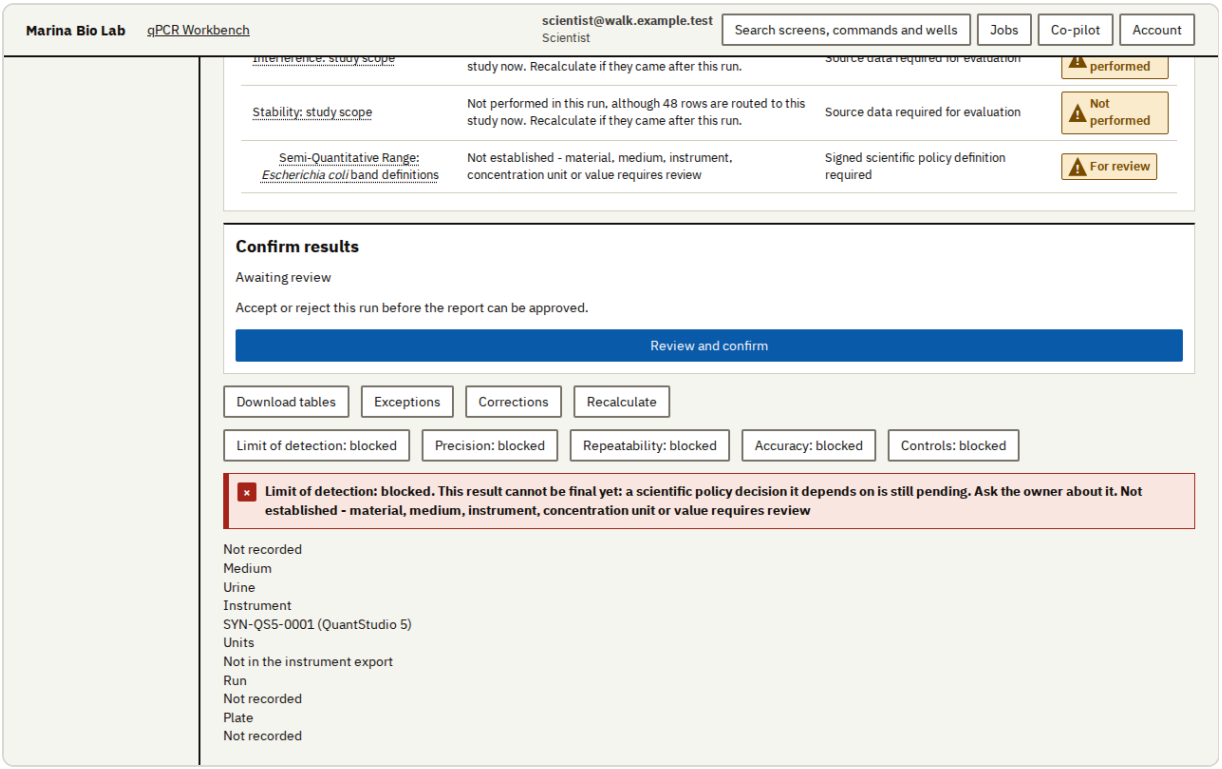


Figure 1.7 Results on the limit of detection tab. Every number, limit and criterion name on this page comes from the calculation.

3 Select a study tab.

Where The row of tabs under the heading.

You see That study's tables. On the limit of detection tab you see the LoD for each target (in the column **LLoD**), then **Hit rate by level** and **Dilution response**. On the precision tab you see the mean, the standard deviation (SD) and the coefficient of variation (%CV) of Cq.

If different If a tab's name ends in **: blocked**, open it. The calculation's reason is at the top of the tab.

4 Select a value to see where it came from.

Where Any table on a study tab.

You see A box opens that explains the value. Select **Show on plate** in it to see the source wells on the plate map.

If different If the run kept no record of where the value came from (its lineage), the box reads **No lineage was recorded for this value.**

Above the hit rate table, a button shows or hides the replicate columns. The button uses the word from the lab's sheet, Ct, for example **Show Ct values**. Ct and Cq are the same measure, the quantification cycle.

Status word on Plate and results	Where	What it means
Met	Acceptance criteria	The calculation found that the criterion is met.
Met, with notation	Acceptance criteria	The calculation found that the criterion is met and attached a notation to the result.
Not met	Acceptance criteria	The calculation found that the criterion fails.
For review	Acceptance criteria	The calculation leaves this criterion for a scientist to review.
Needs more data	Acceptance criteria	The calculation cannot judge the criterion without more data.
Not performed	Acceptance criteria	The study has no source data.
Descriptive	Acceptance criteria	The calculation reports this row but does not say whether it is met.
Not in effect	Acceptance criteria	An answer is on record for the criterion, but the calculation has not applied it yet.
Awaiting review	Confirm results	No one has accepted or rejected the current run yet.
Accepted	Confirm results	The run is accepted. If decisions are still open or studies are blocked, a count of each appears after the word.
Rejected	Confirm results	The most recent decision on the run rejected it.
Review unavailable	Confirm results	The workbench could not read the run's review status. Select **Try again**.

Record a decision on a criterion

1. Select **Record decision**.

   Where A card in **Laboratory rules and run decisions**, beside the plate. Under **Acceptance criteria**, the criteria that are met fold under one button, for example **Show 4 met**.

   You see The card opens with the choices and the field **Justification, saved to the decision record**.

   If different A standing decision is a decision kept for this client (section 1.11). If the workbench offers one, the button reads **Review standing decision**. If you are looking at an earlier run, the card says **Return to the current run to record this decision.**

2. Choose your answer. Then, in **Justification, saved to the decision record**, type why the decision is scientifically sound.

   Where The open card.

   You see Your answer is marked, and your text is in the field.

   If different If you leave the justification field empty, you see **This decision needs a justification.** To close the card without recording a decision, select **Cancel**.

3. Select **Record decision**.

   Where The bottom of the card.

   You see **Decision recorded in the review ledger.** The card then shows the answer with your name and the date.

   If different If the evidence behind the card changed after the page opened, you see **Reload the page before answering: this card predates the current evidence.** Reload the page in your browser and answer the card again.

Correct a result value

Use a signed correction when a calculated value needs to be replaced. It replaces one calculated value in the result tables with the value you sign. It records your reason, and it takes effect from the next calculation. Only a scientist can sign a correction. Copies of the report already issued never change. In the client copy (the version the client gets), the signed value appears only where one of its tables prints that row of the result tables. Any table that the client copy calculates from the measurements keeps the calculated value.

1. Select the value in its table.

   Where A study tab of the results, on the current run.

   You see The box that explains the value.

   If different If you are looking at an earlier run, the box offers no correction. Select **Return to current** first.

2. Select **Correct this value**.

   Where The box under the value.

   You see The drawer **Correct a result value** opens. It shows the table, the row and the value as this run recorded it.

   If different If you are an admin, you see **Only a scientist can sign or read signed corrections.** Ask a scientist to make the correction.

3. Type the new number in **Corrected value**. Use the same scale as the table, a decimal point, and no unit or percent sign.

   Where The form in the drawer.
   You see Your number in the field.
   If different If you type a comma instead of a decimal point, you see **Write the value with a decimal point and no comma: 1.5, not 1,5.**

4. Type why the value changes in **Reason**.

   Where Below the corrected value.
   You see Your text in the field. **Sign correction** can now be selected.
   If different When the reason is empty, a line under the button says **Say why the value changes.**

5. Select **Sign correction**.

   Where The bottom of the form.
   You see A notice with the signed value and a **Recalculate** button. The correction counts only after you recalculate.
   If different While a calculation is running, the form shows **A results calculation is running. Sign once it finishes.** Wait for that calculation to finish, then sign.

6. Select **Recalculate**.

   Where The notice in the drawer, or the buttons above the results.
   You see A new results run with the corrected value in it. The value is marked with a line that starts **Replaced by a scientist:**.
   If different To undo a correction, select **Corrections** above the results. Select **Revoke** on the correction's line, then **Revoke** again to confirm. Then recalculate.

Confirm results

Before a scientist can approve a report, someone must accept its results run. A scientist or an admin can do that. The workbench records your accept or reject decision under your account, so you do not type your name for this one.

1. Select **Review and confirm**.

   Where The bar **Confirm results**, above the results.
   You see A form with the fields **Rationale**, **Evidence** and **Scientific rationale**.
   If different If the bar says the run's review status could not be read, select **Try again** first.

2. Select **Use this** beside the line that begins This run, or choose the kind of reason in **Rationale** and what you reviewed in **Evidence**.

   Where The top of the form. The form also lists **What the final copy still needs** (section 1.10).
   You see The line names the run's facts and what Use this fills in, for example **Observation confirmed** in Rationale and **Result package manifest** in Evidence. Nothing is filled until you press it. In **Rationale** the choices are **Observation confirmed**, **Correction required**, **Approved deviation** and **Scientific policy override**.
   If different After a recalculation, the form also offers your rationale for the previous run, with **Use this rationale**. Read it before you use it. To reject the run, choose from the same lists. If you choose a figure, select **View figure** to see it before you decide.

3 Type your reasoning in **Scientific rationale**.

Where The text box of the form.
You see Your text in the box. **Accept results** and **Reject results** can now be selected.
If different While the box is empty, the form shows **Enter a scientific rationale to accept or reject.**

4 Select **Accept results** or **Reject results**.

Where The bottom of the form.
You see A window with the same title asks you to confirm, with your rationale. Select **Accept results** or **Reject results** in it. The bar then shows **Accepted** or **Rejected**, with your name, the time and your rationale.
If different If the run or its review changed after you opened the form, you see **The results changed since you opened them. Your draft is kept.** The line below that message says what changed. Read it, then decide again.

Checkpoint: the bar **Confirm results** shows **Accepted** or **Rejected**, with your name and the time. If all of this matched, you are done with this section. Take a break before the next one.

1.9

The report

> You are here: the workbench, with a results run accepted. At the end the scientist copy is generated and its wording is reviewed. If your lab needs it, the copy is also approved. About 30 minutes.

Each results run gets its own report, and the report comes in 3 versions. The scientist copy is your working version, and it never goes to the client. The client copy is the version for the client, and the workbench builds it from the results run alone. The final copy is the client copy plus the approval line. You sign the final copy and publish it (section 1.10).

Generate and read the scientist copy

1 Select **Report**.

Where The left rail, or **Open report** above the results.
You see The heading **Report** and the box at the top, which says what is needed now and holds the one main button for it. If there is no report yet for the current run, the box offers to create (generate) one.
If different If the box says you must accept the run first, select **Open results** and confirm the results.

2 If the box offers it, select **Generate scientist copy**.

Where The box at the top of Report.

You see The message **Scientist copy queued. It shows here when it is ready.** When it is ready, the report appears on the page, marked **Draft**. The box's main button then reads **Generate client copy**, because only the client copy can go to the client.

If different If the report is already on the page, the scientist copy exists. Go to step 3. If you see **A job is still running on this validation. Generate the scientist copy once it finishes.**, wait for that job to finish, then try again.

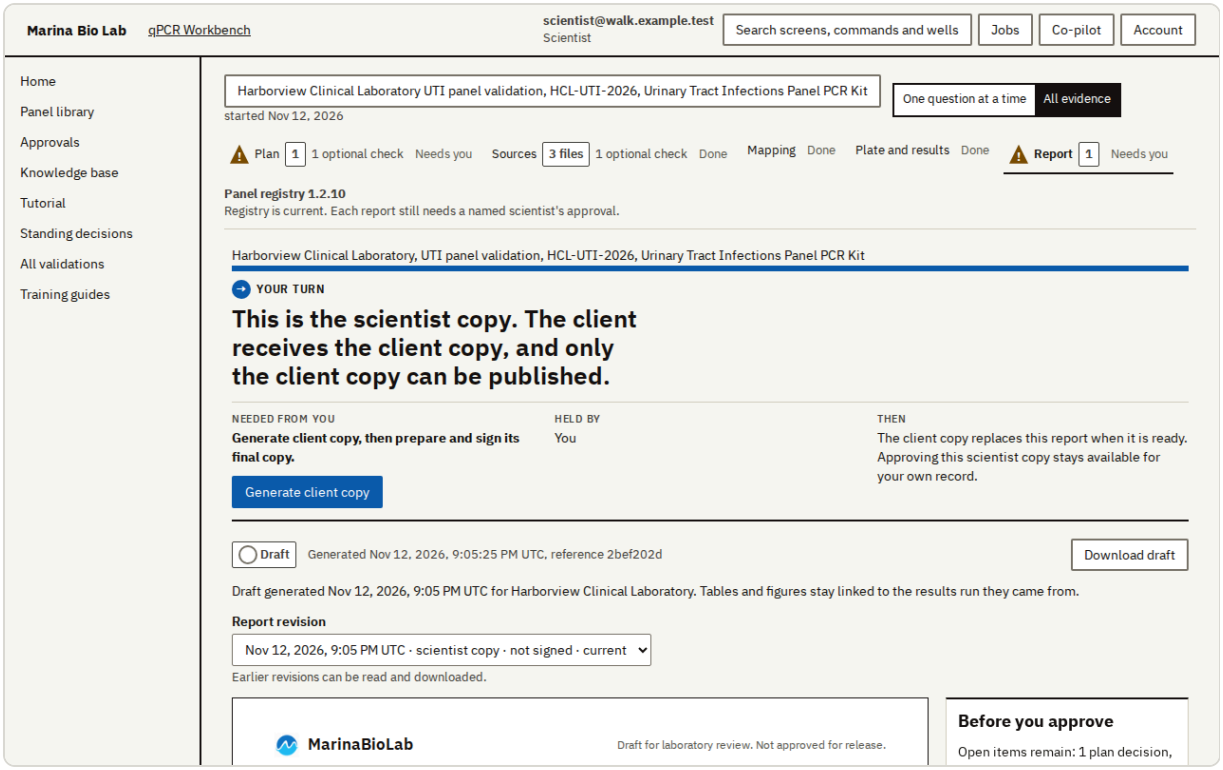


Figure 1.8 Report with a draft scientist copy. The main button is Generate client copy. The workbench writes the report's own headings and text for each run.

3 Find a section you want to change and select **Edit wording** on it.

Where Beside each section of the report. To jump to a section, select it in the outline in the right rail.

You see The section's text appears in a box you can type in. A blank line starts a new paragraph.

If different If you do not see **Edit wording**, the report is already approved, or it is an earlier revision (an older version). You can edit only a draft of the current revision. To find the sections that still need your wording, look for **AI draft, needs your wording** in the outline.

4 When the text reads the way you want, select **Save wording**.

Where Below the box.

You see A message that names the section and ends **wording saved as a new draft revision.**

If different If you see **The report changed since you opened it. Your text is kept: review the latest revision and save again.**, a newer revision arrived while you were typing. Do what the message says.

5 Read every row under **Before you approve**.

Where The right rail.

You see The rows **Source files parsed**, **Mapping confirmed**, **Result decisions recorded**, **Report certified** and **Published to the client portal**, each with a mark and a detail. The counts agree with the numbers in the rail.

If different If the calculation blocked a study, you also see a row **Blocked studies**. Each open row (one that is not done yet) has a button, usually **Resolve**. It opens the stage where you can fix it.

6 Select **Download draft**, then choose a format in the menu.

Where The buttons to the right of the heading.

You see A menu with **PDF**, **Word document**, **Markdown**, **Result tables (XLSX)** and **Result tables (CSV)**. A draft downloads without certification, with the word DRAFT printed across it as a watermark.

If different After approval, the button reads **Download**. For a certified revision, the menu also offers **Certified Marina report**.

Approve a scientist copy

Sometimes your lab needs a signed internal record of the scientist copy. In that case you can sign a revision of it. Approving the scientist copy does not publish anything. Only the signed final copy reaches the portal.

1. Select **Approve this scientist copy**.

   Where The card **Report audience** in the right rail (the column down the right side of the page). The main button at the top is Generate client copy, because only the client copy can go to the client.

   You see The dialog **Approve this report for release**.

   If different If something is still open, the dialog lists the open items and asks you to check a box or give a reason. If the button is grayed out, the right rail explains why.

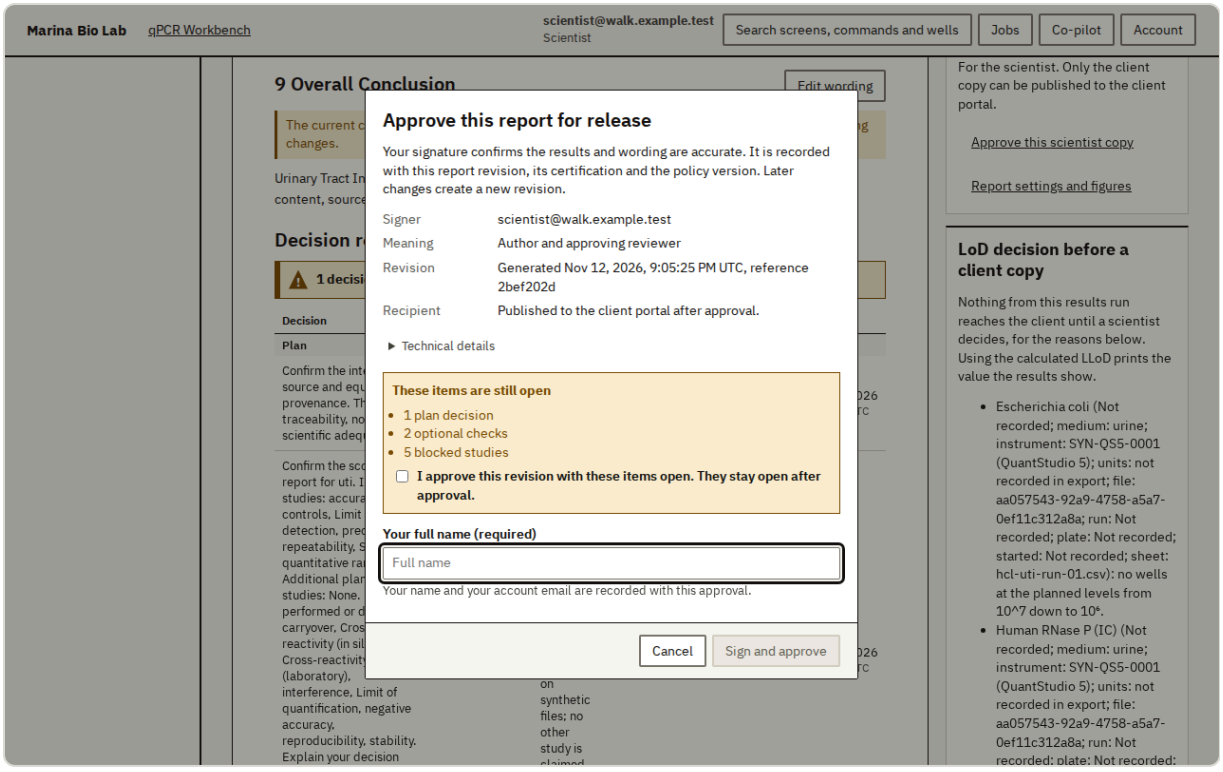


Figure 1.9 The dialog of Approve this scientist copy. The dialogs for the final copy and for publishing look the same, with other titles and buttons.

2. Enter your name in **Your full name**.

   Where The dialog.

   You see Your name in the field. The workbench records it with your account email when you sign.

   If different If you see **Type your name, not your email address.** or a line that starts with **Type your name as your profile shows it:**, what you typed does not match your account. Type your name exactly as your profile shows it.

3. Select **Sign and approve**.
   - **Where** The bottom of the dialog.
   - **You see** The report is marked **Approved**, and a message starts with **Report approved: revision of**.
   - **If different** If you see **No answer came back, and the report does not show this as recorded. Your typed name is kept: sign again when you are ready.**, your signature did not go through. Sign again.

Checkpoint: the report shows **Draft**, or **Approved** if you signed it, and you have read every row under **Before you approve**. If all of this matched, you are done with this section.

1.10

The client copy, the final copy and publishing

> You are here: the workbench, on the Report page of a validation whose results run is accepted. At the end the signed final copy is published to the client's project in the portal. About 30 minutes.

The client gets one document from you: the signed final copy. Getting there takes a few jobs, in this order. You generate the client copy. You prepare the final copy from it. You read and sign the final copy. Then you publish it to the client's project in the portal.

ONE COPY PER RUN

Each results run makes only one client copy, so finish every check on the results before you generate it. If you ask for a second client copy of the same run, you see **This results run already made its client copy, so nothing new was queued. A run makes one client copy. If you need another, ask the owner of this workspace. Change a plan input only for a justified scientific correction, never to get a new copy.** Wording you saved on the scientist copy does not carry over into the client copy. Read the client copy's own wording before you prepare its final copy.

Generate the client copy and prepare the final copy

1. Select **Generate client copy**.
   - **Where** The box at the top of Report. The card **Report audience** in the right rail has the same button.
   - **You see** The message **Client copy queued. It replaces this report when it is ready; then prepare its final copy, sign it and publish.** The card Report audience then reads **Client copy**.
   - **If different** If another job is running, the page asks you to wait. You cannot generate, prepare or publish the client copy until that job finishes. If the card **LoD decision before a client copy** shows in the right rail, the limit of detection evidence of this run is incomplete, and nothing from this run reaches the client until a scientist decides. Choose **Use the calculated LLoD in the client copy** (and say why in **Why the calculated LLoD stands**) or **Hold the client copy until these levels are rerun**, then select **Record decision**.

2. Read **What the final copy still needs**, and fill each row.

   Where The right rail of the client copy.

   You see Each empty report fact, for example the instrument model or the extraction kit, with **Open Report settings**, and each section that would print nothing, with **Edit wording**.

   If different Report settings lists values under **Proposed from what this validation already holds**, each with its source and **Use**, and **Use all**. Nothing is saved until you save the settings. A new client copy can also offer wording you saved on the client copy of an earlier run, with **Use previous wording**.

3. Read the client copy on the screen first, then select **Prepare final copy**.

   Where The box at the top of Report.

   You see A dialog opens. Its title starts with **Prepare the final copy of**. It explains what the final copy will print, and that nothing is approved yet.

   If different If the dialog shows **Read this before you prepare**, read the list. Then check the box **I have read this and want this copy prepared as it stands.** If a warning above the report says the LoD table has no Ct values, close the dialog. Follow the steps in the warning first, then prepare the final copy.

4. In **Your full name, as it will print**, type your name the way the report should print it.

   Where The dialog.

   You see The row **Prints** shows the approval line, with your name and the date in UTC (Coordinated Universal Time, the world reference time).

   If different If you see **This name has a character the current report font cannot print. Ask the owner of this workspace to prepare a copy that preserves your name.**, the report font cannot print a letter of the name. Ask the lab's owner or an admin to prepare that copy.

5. Select **Prepare final copy** in the dialog.

   Where The bottom of the dialog.

   You see The message **Final copy queued. It replaces this report when it is ready; then read it and sign it.** When the copy is ready, the report is marked **Final copy, not signed**, with the UTC date it prints. You can sign it only on that same UTC day.

   If different If that UTC day ends before you sign, the button reads **Prepare final copy** again. Prepare the copy again, then sign it on the new day.

Read and sign the final copy

Only the scientist whose name is printed on the final copy can sign it. If you are an admin, the sign button stays grayed out, and the right rail reads **Only a scientist can sign.**

1. Select **Download draft**, choose **PDF**, and read the final copy in the file you download.

   Where Report, the buttons under the box at the top.

   You see The final copy as it will print. It has a draft watermark, which the published copy does not have.

   If different The report on the screen is only for reading. To check the printed layout, use the PDF you downloaded.

2. Select **Sign the final copy**.

   Where The box at the top of Report.

   You see A dialog opens. Its title starts with **Sign the final copy of**, and it shows the approval line the copy prints.

   If different If the button reads **Prepare final copy** again, read the hint in the right rail to see why. Usually the copy prints another scientist's name, or its UTC day has passed. Prepare it again in your name, and sign it on the same UTC day. If the project's final-payment terms are not recorded yet, the right rail's row **Payment terms** reads **Not recorded by the owner yet. Signing asks the owner to record them.** If you see **This report is already signed.**, someone signed it in another browser tab or session. No dialog opens, and the page updates to show the signed report.

3. In **Type the name this copy prints**, type the name exactly as the copy prints it.

   Where The dialog, above the line that shows the printed name.

   You see Your name in the field. **Sign the final copy** can now be selected.

   If different If what you typed does not match, a line that starts with **Type the name exactly as this copy prints it:** shows the name to type.

4. Select **Sign the final copy** in the dialog.

   Where The bottom of the dialog.

   You see The report is marked **Approved**. The main button now reads **Publish to client portal**.

   If different If the dialog shows **No answer came back, and the report does not show this as recorded. Your typed name is kept: sign again when you are ready.**, your signature did not go through. Select **Sign the final copy** again.

Publish to the portal

1. Select **Publish to client portal**.

   Where The box at the top of Report.

   You see The publish dialog. Its title names the validation, and the row **Recipient** names the client.

   If different If the validation is not linked to a client project yet, you see the dialog **Bind this validation to its client project** instead. Go to step 2. If you see the publish dialog, go to step 4.

2. Choose the client project, then type why the validation belongs to it.

   Where The bind dialog. First the list of projects, then the field **Why this validation belongs to this project, saved in the audit trail**.

   You see The project you chose is marked, and your reason is in the field.

   If different **Bind to project** stays grayed out until you choose a project and type a reason. Check the project carefully, because you cannot change the link here later.

3. Select **Bind to project**.

   Where The bottom of the dialog.

   You see A message that names the project and ends **Recorded in the audit trail.** The audit trail is the record of who did what and when. The dialog then moves on to publishing.

   If different If the workbench refuses the binding, the dialog says why and records nothing.

4. Enter your name in **Your full name**.

   Where The publish dialog.

   You see Your name in the field. The workbench records it with the publication, and the client does not see it.

   If different If the dialog says it is waiting for payment terms from the owner, select **Notify the owner**. The lab's owner or an admin must record the project's final-payment terms in the console first. After that you can publish.

5. Select **Sign and publish**.

   Where The bottom of the dialog.

   You see The box **Published to the client portal** in the right rail, with a sentence that names the project and says whether the client can download the report.

   If different If something is holding back the download, the box reads **Published, client download paused** instead. The sentence in the box gives the reason, for example that the report opens to the client once the final payment settles.

Client download, and what can pause it

Once you publish the report, the client downloads it from their project in the portal. The publish dialog says **The client can download it there once nothing on the project holds it back, such as an unpaid final payment.** The workbench releases any deliverables (extra files for the client) uploaded for the project together with the report (section 1.12). If you publish a newer revision, it replaces the earlier one in the portal. Copies the client already downloaded stay with them.

When the box reads **Published, client download paused**, the sentence in it gives the reason. Some reasons are for the lab's owner or an admin to fix in the console: the client still owes a payment, the project has a financial hold (a stop on the project for money reasons), or the project is not active or completed. Other reasons are for you. If the validation changed after publishing, or the published copy was withdrawn or replaced, publish a new revision.

AFTER PUBLISHING

While a report is published, a note at the top of every page of the validation warns you about changes. Some changes take the report away from the client: recalculating, generating a copy again, answering a decision card, uploading a source file or correcting the mapping. After any of these, the client cannot download the report until you publish a new revision.

Checkpoint: the right rail shows the box **Published to the client portal**. If it reads **Published, client download paused**, the sentence in it gives the reason. If all of this matched, you are done with this section. Take a break before the next one.

1.11

The co-pilot, help from a person and standing decisions

> You are here: the workbench, with a validation open. At the end you can ask the co-pilot a question, check its answer, ask a person for help and keep a standing decision. About 15 minutes.

The co-pilot is a helper inside the workbench. It answers questions about the open validation, using the validation's saved data, and it can propose changes. A proposal changes nothing until you apply it. The co-pilot never approves results. Treat every answer as a draft that you check.

Ask the co-pilot

1. Select **Co-pilot**.

   Where The header at the top of the page, on the right.

   You see A drawer (a panel that slides in) opens on the right, headed **Co-pilot**. Suggested questions sit above the box where you type, among them **What should I do at this step?**

   If different If the drawer shows **The conversation could not be loaded**, select **Retry**.

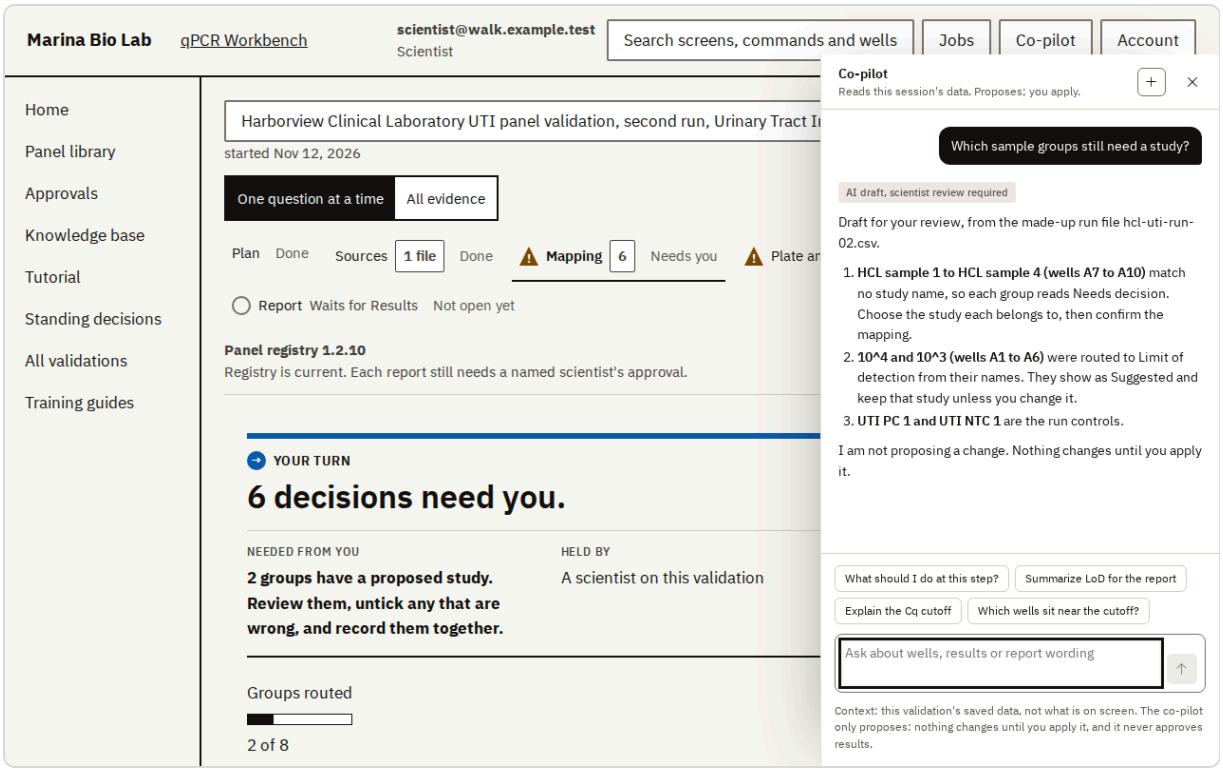


Figure 1.10 The co-pilot drawer, with demo data: a stored question and its draft answer. Every answer carries the same AI draft mark.

2. Type your question in the box and press Enter.

   Where The bottom of the drawer.

   You see First **Preparing an answer...**, then the answer.

   If different If the co-pilot cannot answer, the drawer puts your question back in the box and shows the reason.

3. Read the answer and the sources it cites.
   - **Where** The conversation in the drawer.
   - **You see** The mark **AI draft, scientist review required**, the answer, the sources it cites and often a note **Before you rely on this answer**.
   - **If different** If a line says part of the validation could not be read, the answer may be missing something. Ask again.

4. A relabel proposal suggests new labels for some measurements. On one, select the line that starts **Review all** to open the list of measurements it affects.
   - **Where** The proposal card under the answer.
   - **You see** Each measurement the relabel changes, with its well, its place and what it reads now.
   - **If different** Other proposals have no list. Go to the next step.

5. Select **Apply**, **Edit** or **Dismiss** on the proposal.
   - **Where** The bottom of the proposal card.
   - **You see** A line on the card says what changed, or **Dismissed.**
   - **If different** **Edit** opens the value and the field **Reason recorded with the change**. Change them as needed, then select **Apply**. If the validation changed after the co-pilot showed the proposal, you see **This validation changed since this proposal was shown, so nothing was applied. Read it again against what is there now, then apply it or ask for a fresh proposal.**

A decision card has **Ask the co-pilot about this decision**. It puts a question about that card in the co-pilot's box. Nothing is sent until you press Enter.

Ask a person for help

When you are stuck on a card, ask the lab's owner and admins from the card itself. The question goes to the owner console, and the answer comes back to the same card. No email is sent either way.

1. Select **Ask for help with this card**.
   - **Where** The foot of an open decision card on Plan, Sources, Mapping review or Plate and results. For a question about the whole validation, use **Ask for help** in the account menu.
   - **You see** The box **What do you need help with?**, with a line that says the question goes to the owner's console with this screen and this card, and that no mail is sent.
   - **If different** If you already asked about this card and no one has answered yet, the card shows that request instead of the button. Once it is answered, the button reads **Ask again**.

2. Type your question, then select **Send to the owner's console**.
   - **Where** The same form.
   - **You see** A line that begins **Sent to the owner's console on**, with the date, and ends **No mail was sent.**
   - **If different** If the request could not be sent, a line that begins **Not sent:** gives the reason and keeps your text. Select the send button again.

3. Come back to the card later to read the answer.
   - **Where** The same card, under your request. The account menu lists every request of the validation under **Help requests on this validation**.
   - **You see** The answer, under a line that begins **Answered by** with who answered and when.
   - **If different** If there is no answer yet, only your request shows.

Keep a standing decision

A standing decision saves a decision card's answer for one client and panel, so later validations can reuse it. To keep one, check the box below the note or justification field before you record the decision. The box's label starts with **Apply to future validations for** and names the client and panel. Sometimes the box does not appear, because that card's answer cannot be kept. For example, the validation covers more than one panel, or names no client. A standing decision never changes past validations.

In later validations for that client and panel, the card arrives with the kept answer filled in, but you still confirm it. Open the card (on Plate and results, its button reads **Review standing decision**). Then select **Confirm standing decision** in the card's pinned box. You then see a message that ends with **decision confirmed. Recorded in the review ledger.** If the kept answer does not fit this time, choose another option and record the decision as usual.

A validation with no client project can keep a standing decision too. Its box reads **Apply to future validations with no client project**. Such a decision is kept for the lab's own validations and never fills in a card of a client's validation.

While a validation is open, **Standing decisions** in the rail lists the client's kept answers for each panel. To withdraw one, select **Revoke**, type your reason and select **Revoke standing decision**. You then see **Standing decision revoked. Past validations are unchanged.**

Checkpoint: the co-pilot drawer shows your question and an answer marked **AI draft, scientist review required**. If all of this matched, you are done with this section.

1.12

Work on a client project from the workbench

> You are here: the workbench's Home page, after you were assigned to a client project. At the end you have booked an event, issued the validation plan, handled the Pre-Check follow-ups and uploaded the deliverables. About 30 minutes.

A client project is the lab's work for one client. Its page in the workbench holds everything around the lab work: meetings and site visits, the validation plan the client signs, the Pre-Check follow-ups and the deliverables.

You see a project only after the lab's owner or an admin assigns you to it in the console. Home then lists it under **Client projects**. Only the project's validation scientist (the scientist in charge of the validation) sees the sections **Validation plan** and **Deliverables**, and the button **New validation for this project**, which opens the New validation dialog with this project chosen (section 1.3). The sentence under the project's name tells you whose turn it is, for example **Kickoff meeting: your turn. Book it, then record that it was held.**

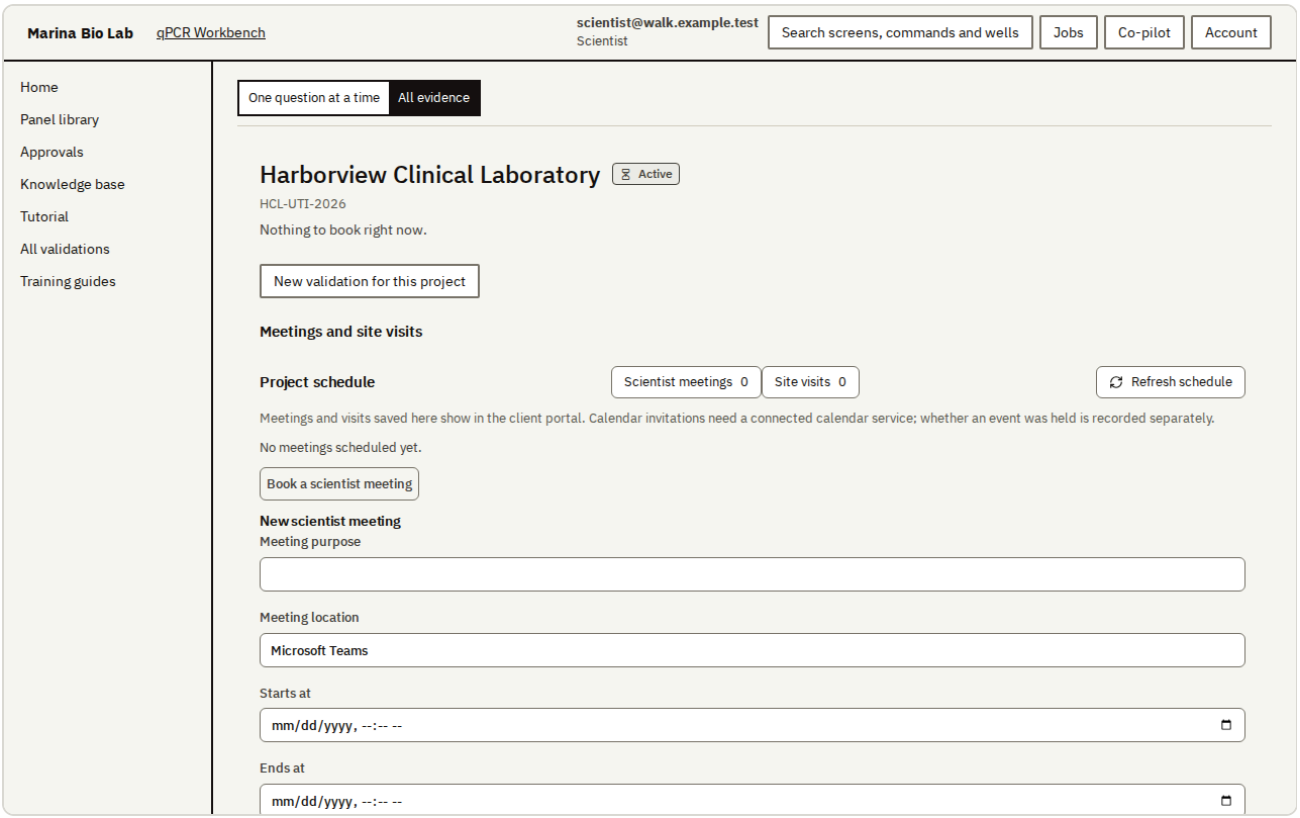


Figure 1.11 A client project page as its validation scientist sees it, with demo data. On the screen, the 4 sections sit one below the other.

Book a meeting or a site visit and record its outcome

1. Select the project.

   Where Home, under **Client projects**.
   You see A page headed with the client's name, a state mark such as **Active**, and the section **Meetings and site visits**.
   If different If you open a link to a project you are not assigned to, you see **You are not assigned to this project. Ask your lab owner or an admin to add you to its team.** One of them has to assign you to it in the console.

2. Select **Scientist meetings** or **Site visits**.

   Where The top of the section **Meetings and site visits**.
   You see A table of events of that kind, with the columns **Event**, **Calendar** and **Outcome**.
   If different If your role does not book the event, the page says who does: the project's validation scientist books the kickoff meeting, and its site visit coordinator books the visits.

3. Open **Book a scientist meeting**, then fill in **Meeting purpose**, **Meeting location**, **Starts at** and **Ends at**.

   Where Below the table.
   You see Before you save, a line shows each time with its time zone.
   If different If you selected **Site visits** in step 2, open **Book a site visit** and fill in **Visit number**, **Starts at**, **Ends at** and the address.

4. Select **Save local schedule**.
   - **Where** The bottom of the booking form.
   - **You see** The message **Schedule saved. Invitations have not been sent.** The event now appears in the table, and the client sees it in the portal.
   - **If different** If a calendar service is connected, select **Calendar** on the row to review the invitation.

5. After the event, select **Record outcome** on its row.
   - **Where** The table of events.
   - **You see** A form with **Outcome** (**Held** for a meeting, **Completed** for a visit, or **No show**) and **Outcome notes**.
   - **If different** If the button reads **Correct outcome**, an outcome is already recorded. Correct it the same way.

6. Choose the outcome in **Outcome**, describe what happened in **Outcome notes**, then select **Save outcome**.
   - **Where** The outcome form under the row.
   - **You see** **Outcome recorded.** The row's outcome changes, and the button reads **Correct outcome**.
   - **If different** If you see **Describe the event outcome before saving.**, the notes are empty. Fill them in and save again. You cannot choose **Held**, **Completed** or **No show** until the event has ended.

Write and issue the validation plan

The validation plan says what you are validating, where and why. The client reads and signs it in the portal before the studies start.

1. In **Summary**, type what you are validating, where and why.
   - **Where** The project page, under **Validation plan**.
   - **You see** Your text in the field. Until you save for the first time, the state above the form reads **No plan yet**.
   - **If different** If you do not see the section, you are not the project's validation scientist.

2. Fill in each section's **Heading** and **Text**.
   - **Where** Below the summary.
   - **You see** The sections in order, and a note that the document leaves out any section with no text.
   - **If different** If the plan needs another section, select **Add section**.

3. On each row, select **Edit** and set the agreed combination of study, instrument, medium, storage and timepoint.
   - **Where** Under **Signed coverage combinations**, below the sections.
   - **You see** Each combination with its choices. A choice you leave open reads **Incomplete**.
   - **If different** If the plan does not need a value, choose **Not required**. The signed plan records that as a decision.

4. Select **Save draft**.

   Where The bottom of the form.

   You see The message **Draft saved. Preview it, then issue it to the client.** The state reads **Draft, not issued**. To see the saved version as a document, select **Preview document**.

   If different Once a draft exists, the button reads **Save as new draft**. A list headed **Before issuing** names what is still incomplete.

5. Select **Issue to client**, then **Confirm**.

   Where Beside the save button.

   You see The message **Issued. The client can now read and sign the plan in the portal.** The state reads **Issued, awaiting client signature**. It changes to **Signed by client** once the client signs.

   If different If the button is grayed out, the reason appears beside it or under **Before issuing**. If you save a change to a plan the client already signed, that creates a new version, and the client must sign it again.

Address or waive Pre-Check follow-ups

The Pre-Check is a list of questions the client answers before the validation starts. The portal calls it the checklist. A follow-up is an item the client answered No to, or left unchecked. The same list appears on a validation's Plan page inside **From the proposal and Pre-Check**. To handle an open item under **Pre-Check follow-ups**, select **Mark addressed** (you dealt with it) or **Waive** (it is not needed). Type a note in **Note (optional)**, or for a waiver give your reason in **Why this item is not needed (required)**. Then select **Mark addressed** or **Waive item**. The item moves to the filter **Addressed** or **Waived**. There you can select **Reopen** to make it open again. Until the client submits the Pre-Check, this section reads **The client has not submitted the Pre-Check yet.**

To send the open follow-ups to the client, open **Kickoff meeting agenda** under the table and select **Prepare agenda and draft message**. A draft message appears under **Message to the client (review and edit before sending)**. If a kickoff meeting is scheduled, the open items also go on its preparation list. Edit the draft, then select **Send to client**. You see **Message sent. The client reads it in the portal.** The workbench sends no email about this message, so the client sees it the next time they open the portal. Their replies appear in the client messages section, which stays collapsed (closed) until you open it.

Upload deliverables

Deliverables are the files the client receives with the report, such as SOP (standard operating procedure) templates and training records. The page says **Files stay staged until a publisher selects and approves them for release with the report. Released files use the report's final payment gate.** The form warns **The title, the file and its name must contain no patient identifiers or prohibited clinical content.**

1. Choose the kind of file in **Type**.

   Where The project page, under **Deliverables**.

   You see The choices **SOP template**, **Training material** and **Training record or certificate**.

   If different If you choose **Raw data**, the form refuses the upload: **Raw data cannot be uploaded here. An uploaded raw-data file is not part of a certified report, so the client could not download it.**

2. Type a title in **Title**, then select **File** and open the file from your computer.

   Where The same form.
   You see The title you typed and the file's name.
   If different The form accepts a PDF, Word (.docx) or Excel (.xlsx) file of up to 3 MB, with no slashes or ".." in its name. It refuses a title over 200 characters, or a file of another kind or size, and gives the reason.

3. Select **Upload**.

   Where The bottom of the form.
   You see A message that begins **Uploaded for review.** The file's row reads **Staged for release approval**. Whoever publishes the report selects and approves the file in the publish step, and the row then reads **Released with the report**.
   If different If the report is already published, a new upload still stays staged until it is selected and approved when a report is published again.

4. When every file is uploaded, select **Mark deliverable set ready**, then **Mark deliverable set ready** again to confirm.

   Where Above the upload form.
   You see A line saying that you marked the set ready, and when.
   If different If you upload another file later, the ready mark is cleared, so mark the set ready again after that upload. To withdraw a file, select **Withdraw** on its row, fill in **Reason**, then select the red button under it.

Checkpoint: the plan's state reads **Issued, awaiting client signature** or **Signed by client**, and the deliverables show the line that you marked the set ready. If all of this matched, you are done with this section. Take a break before the next one.

1.13

Approvals, the panel library, the knowledge base and the tutorial

> You are here: the workbench, signed in as a qualified scientist. At the end you have answered and signed a card in Approvals, and you know what the other reference pages hold. About 10 minutes.

Some decisions need a qualified scientist to sign in and sign them personally. These sign-offs wait in Approvals. The workbench records each answer with your name and the UTC time. Nothing you answer there changes a calculation. The lab decides who may answer each kind of card.

1. Select **Approvals**.

   Where The left rail.
   You see The sections **Needs you**, **Waiting on someone else** and **Done**.
   If different If you see **No approval waits on your sign-in. Only the briefing above needs you.**, read the briefing card above. If you see **Nothing waits on your sign-in.**, no card is yours to answer right now.

2 Read the card and choose your answer.

Where A card under **Needs you**.
You see The card shows the rows **Who must act**, **If no one answers** and **What an answer does**. The answer you chose is marked.
If different If a card is not yours to answer, it says who it is waiting for.

3 Type any comments the card asks for, then select **Review and sign**.

Where The bottom of the card.
You see A dialog repeats your answer and what it does. It has the field **Type your full name to sign**.
If different If you see **Choose an answer.** or **Write your comments; they are recorded with the card.**, something on the card is still missing. Fill it in and try again.

4 Type your full name in **Type your full name to sign**, then select the button that shows your answer.

Where The dialog.
You see A line that says what was recorded, when and by whom. The card moves to **Done**.
If different If you see **The answer was not recorded. Nothing changed.**, sign again. You cannot edit an answer once it is recorded. To change it, select **Revoke** in the card's history, then answer again.

Page	What it is for
Panel library	The page has 2 tabs. **Kits & IFUs** lists every kit in the catalog, with its targets, its channels and any known documentation problems in its Instructions for Use (IFU, the kit maker's manual). **Registry panels** has a card for each panel in the lab's registry, with its targets and the buttons **IFU** (downloads the IFU) and **Kit details**. The button **Registry detail**, beside the page heading, shows the registry's cutoffs and which studies each panel can be used for.
Knowledge base	A list of reference records that you can search but not change, such as practice definitions, panel definitions, scientific sources and recorded decisions. A link inside an entry opens the entry it names.
Tutorial	The **Training guides** page: a short written guide for each site, the workbench, the owner console and the client portal, one task at a time, in the words on screen.

Checkpoint: the card you signed is under **Done**, with a line that says what was recorded. If all of this matched, you are done with this section. Take a break before the next one.

1.14

Common mistakes and how to recover

Mistake or situation	What you see	How to recover
You recorded the wrong answer on a decision card on Plan, Sources, Mapping review or Plate and results.	The card reads **This decision cannot be changed here. If it is wrong, start a new validation from Home and upload the files there: the new one asks again.**	For a sample group's study, select **Change the study** on Mapping review (section 1.6). For a confirmed report scope, use **Change report scope**, which takes the current results and report out of use. For other cards, start a new validation and upload the files there.
You uploaded the wrong file, or the same run twice.	The file stays in the table of files on Sources. The workbench never deletes a file.	Select the file and open **Source decisions**. Either choose the file it replaces, or save an exclusion with your reason. Then recalculate.
You uploaded a pool map as a source file.	The status **Not a run file** and **This looks like a pool map workbook: no Cq results table was found, so it was not read as a run.**	Wait until a run with pooled samples has been read. Then select **Upload pool map (.xlsx)** on Plan to add the pool map there. After that, exclude the pool map file on Sources.
A group is mapped to the wrong study.	Plate and results counts the group's wells under that study.	On Mapping review, select the group, then **Change the study**. Choose the right studies, type the reason, record it, and recalculate. If the pane says why the study cannot be changed, follow what it says.
You changed sources, mapping or scope after the calculation.	Plate and results reads **No current results run** and **The inputs changed after the last run, so it is no longer current. Recalculate for a new run, or pick an earlier run above to read it.**	Select **Recalculate**, then review and accept the new run.
You are looking at an older run without knowing it.	A notice headed **You are viewing an earlier results run.** It says that accepting or rejecting results, recalculation and the report use the current run.	Select **Return to current**.
Recalculate cannot run.	The page says that decisions are still open, or **Confirm the Equipment and kit record on Plan. Results are calculated after you confirm it.**	Record the open decisions the words name, then the equipment and kit record (section 1.4). Then recalculate.
The equipment and kit record asks again.	The card **Equipment and kit record** reads **Needs decision**, with your last answer filled in.	Check the lines, select **Record the equipment and kit record**, and recalculate.
Use all did not fill every field.	A field lists more than one proposal, and the button read, for example, **Use 3 of 5 proposals**.	Choose the value yourself with **Use** under the one you want. The workbench never picks between two sources for you.

Mistake or situation	What you see	How to recover
You signed or revoked a correction and did not recalculate.	**These results do not include every signed correction, revocation and replacement yet. Recalculate before a report of them is approved or published.**	Select **Recalculate**, accept the new run and generate the report from it.
You approved the scientist copy and cannot find **Publish to client portal**.	The hint **Approved scientist copy. Only the client copy can be published: generate the client copy, prepare and sign its final copy, then publish.**	Go to section 1.10 and follow it from the first step.
Wording you saved on the scientist copy is missing from the client copy.	The card **Report audience** on the scientist copy says **Wording you saved on this copy is not carried into a new client copy.**	Before you prepare the final copy, read the client copy's own wording. Where the **Edit wording** button shows, use it to fix the text. A run makes only one client copy. If you need another, ask the lab's owner or an admin.
You changed a validation whose report is published.	The box **Published, client download paused** on Report.	Recalculate, accept the run, generate a new client copy, prepare and sign its final copy, and publish again.
You archived a validation you still need.	It no longer shows in **Validations**, and the workbench will not recalculate it or take uploads.	On Home, select the filter **Archived**, open the row's menu and select **Unarchive**.
You closed or reloaded the page with unsaved text.	A notice says your unsaved text was brought back, with the button **Discard restored text**.	Check the restored text and save it, or select **Discard restored text**.

PART 2

MarinaBioLab owner console

The console is the site where MarinaBioLab runs each client project. A client project is one piece of work for one client, with its steps in order. In the console you handle the proposal (the document that sets the scope and price), the payments, the Pre-Check (the checklist the client fills in), the meetings, the project team and the release of the report. The console also holds the lab's staff list and the calculator defaults that new proposals start from.

Who uses it	The owner of the lab's workspace, and any admin whose email address is on the console's owner list (the list of email addresses allowed into the console).
Address	Ask the owner of the lab's workspace for the console's web address.
You need	An account on the owner list, and a browser on a laptop or desktop computer. If the lab has turned on two-step verification, you also need an authenticator app on your phone.
Signing in	A link or a code sent to your email. There is no password.

WHAT THIS PART IS FOR

This part is for the owner of the lab's workspace and for any admin who runs client projects, including an admin who is new to the lab. It walks through the console in the order a project happens: create it, invite the client, issue the proposal, take payments, run the Pre-Check and meetings, and release the report. Each section is one task you can do on its own. When you finish, you can take a client project from start to finish in the console.

2.1

Sign in

> You are here: the console's sign-in page, not signed in yet. At the end you are signed in and looking at **Today**. About 5 minutes.

The console does not use passwords. It emails you a sign-in link and a code, and you can use either one. Only an email address on the lab's owner list can get in. That list is part of the system's setup, so ask the person who runs the lab's server to add or remove an email address. Giving someone a role on the **Team** page does not add them to the owner list.

1. Enter your email address in **Work email**.

   Where The console's sign-in page, in the box under the heading **Sign in to the owner console**.
   You see Your email address in the field.
   If different If **Today** opens instead, this browser is already signed in. You can go on to the next section.

2. Select **Email me a sign-in link**.

   Where The button directly below the email field.
   You see The heading **Check your email** and a new field for a code.
   If different If you see **Enter a valid email address.** under the field, the address has a typing mistake. Correct it and select **Email me a sign-in link** again.

3. Open the email from the console and select the sign-in link in it.

   Where Your email inbox, on the same computer you are signing in on.
   You see A page headed **Finish signing in**.
   If different If the console opens straight away, skip the next step. If you prefer the code, go back to **Check your email**, type the code into **Enter the code from the email**, select **Sign in with the code** and skip the next step. If no email arrives, select **Send again** (you can use it 60 seconds after the last email). Only an email address that already has an account gets the email, so check the address you typed.

4. Select **Continue to sign in**.

   Where The page **Finish signing in**, which the link opened.
   You see **Today**, or the console page you asked for before you signed in. If the lab uses two-step verification, you first see the page **Set up two-step verification** or **Two-step verification**. Follow the extra steps below.
   If different If you are back on the sign-in page with **Sign-in could not be completed with that link. It may have expired or been used already. Request a new sign-in email below.**, the link has already been used or is too old. Enter your email address and select **Email me a sign-in link** again. If you see **This account does not have access to the owner console. Sign in with an owner email.**, your email address is not on the owner list. Sign in with an address that is on it, or ask the person who runs the lab's server to add yours.

Two-step verification

Two-step verification is an extra check after the email step. When the lab uses it, the console asks for a 6-digit code from an authenticator app on your phone (an app that shows a new short code every few seconds). The first time, you connect the app to the console.

1. Open your authenticator app and scan the QR code (the square barcode) on the screen.

   Where The page **Set up two-step verification**, marked **Step 2 of 2** near the top.
   You see The app now lists the console and shows a 6-digit code for it.
   If different If the heading reads **Two-step verification**, your app is already connected, so go to the next step. If the app cannot scan the QR code, type the key printed under the code into the app instead.

2 Type the code from the app into **Authentication code**.

Where	Under the QR code. If the app was already connected, the field is under the heading.
You see	6 digits in the field.
If different	While the page reads **Preparing two-step verification…**, you cannot type in the field yet. Wait a moment. If an error appears, select **Try again**.

3 Select **Verify**.

Where	The button below the code field.
You see	**Today**, or the page you asked for before you signed in.
If different	If you see **That code did not match. Enter the current 6-digit code.**, the app has already moved on to a new code. Type the code it shows now. If you see **Your sign-in has ended. Sign in again to continue.**, select **Sign in again**.

Checkpoint: you see **Today** with the menu down the left side. If all of this matched, you are done with this section.

2.2

Find your way around

> You are here: the console's **Today** page, right after you signed in. At the end you know what each part of Today and each menu page is for, and how to sign out. About 10 minutes.

Every console page has the same menu down the left side. **Today** sits at the top of the menu, and it is the page you land on after you sign in. It opens with a box that names what needs you first, who holds it and what comes next. Below the box, in this order:

- **What moved since your last visit**: what changed on your projects since you last opened Today.
- **What is stuck, and for how long**: the projects that have waited longest, with who holds them, unanswered client messages by age, and the scientists' help requests, which you answer here (section 2.12).
- **Ready for one press**: work the console has prepared, such as a saved draft to issue. Each button only opens the step's own form. Nothing is recorded until you act there.
- **Needs you today**: one card for each thing that is waiting on you. Clients waiting longest come first. Steps that someone else holds are listed under **Waiting on someone else**.
- **With clients**: the open projects that wait on a client, and how long each has waited.
- **At a glance**: 4 counts, active client projects, projects waiting on clients, unpaid invoices and validation runs in the last 30 days.

When nothing is waiting, **Needs you today** reads **Nothing is waiting on you.** and offers a button, **Browse client projects**.

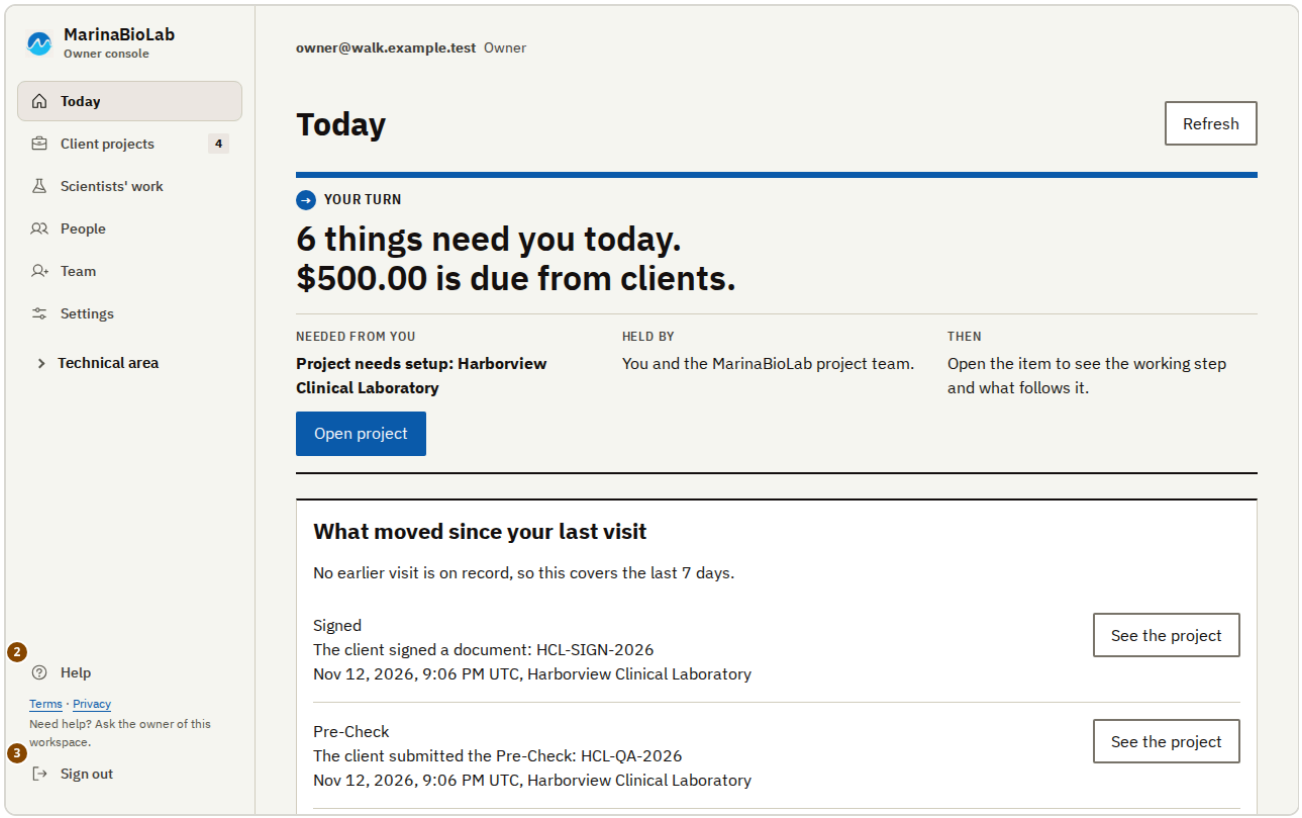


Figure 2.1 Today, with demo data. The box at the top names the first thing that needs you. **Help** (2) and **Sign out** (3) sit at the bottom of the menu.

1 Select the button on one of the cards.

Where Under **Needs you today**, on the right side of the card.
You see The project opens at the step or the place the card is about.
If different If a card reads **Could not be checked**, the console could not work out whose turn it is on that project. Select **Try again**.

2 Select **Help**.

Where The bottom of the menu on the left.
You see A window opens with **Learn the console** (with the link **Read the owner guide**), **Runbooks** (the titles of the owner guides that the person who runs the lab's server keeps), **Contact support** and **Terms and privacy**.
If different If the lab has not set a support email address, you see **Get help** in place of **Contact support**. It tells you to ask the owner of the workspace.

3 Select **Sign out** when you finish working.

Where The bottom of the menu, under your email address.
You see The sign-in page.
If different If you see the note **Signed out on this device. The sign-in service did not confirm it, so a sign-in on another device may still be open.**, sign out on any other computer or phone you used too.

Page in the menu	What it is for
Today	What moved, what is stuck and what is ready, the cards for what needs you today, the scientists' help requests, the decision cards (questions the lab must answer and keep on record) and the 4 counts under **At a glance**.
Client projects	The list of every client project. You create and open projects here, and you read unread messages from clients.
Scientists' work	The validation sessions your scientists are working on in the qPCR Workbench (the scientists' site, called the workbench). **Archive** puts a finished or abandoned session away. Nothing is deleted.
People	Your team and the client contacts who can sign in, with what each person has been working on.
Team	Invite scientists and admins, change someone's role, or turn someone's access off.
Settings	The calculator defaults every new proposal starts from.
Technical area	One entry that opens the 5 pages below. The person who runs the lab's server usually works there.
Release evidence	The checks the server records before a new version of the system goes live. Each check reads passed, failed or not established.
Panel registry	The validation panels that the calculators and reports know about. A panel is the set of targets one kit detects. To decide on a proposed change, select **Review approval** or **Review rejection** on its row and type a reason of 12 to 2,000 characters. Then check the box that says the review is final, and confirm.
AI activity	The questions scientists asked the co-pilot (the workbench's AI helper). The wording of a question stays hidden even when you open it, and the console records each time you open one.
Jobs & health	The background work the system does for scientists (reading run files, calculating results, writing reports) and the state of the service. The person who runs the lab's server usually deals with failures here.
Audit trail	A record of every recorded change, newest first, with a **Download CSV** button. When a confirmation offers **View this audit entry**, that link brings you here.

Card under Needs you today	Button	Where the button takes you
Client waiting on you	**Open project**	The project, open at its current step. The client who has waited longest comes first.
Unpaid invoice	**Review payments**	The project, open at its first payment step that is not finished.
ClickUp	**Open ClickUp settings** or **Open Team and activation**	The place where you fix a stopped sync with ClickUp, the lab's task tracker.
Client message	**Read and reply**	The project's **Messages**, where you read the message and answer it.

3 of the counts under **At a glance** open the project list when you select them: **Active client projects**, **Waiting on clients** and **Unpaid invoices**. The fourth count, **Validation runs in the last 30 days**, is a number only and opens nothing. **Today** leaves test, canceled and archived projects out of its cards and counts. A client message on an archived or canceled project still shows, though.

Many confirmations and error messages end with a folded line called **Technical details**. It holds reference numbers for support staff and auditors. You can ignore it in daily work.

Checkpoint: you opened a project from a card, opened the **Help** window and signed out, and the sign-in page is showing. If all of this matched, you are done with this section. Take a break before the next one.

2.3

Create a client project

> You are here: the console, signed in. At the end a new client project exists in the draft state. About 5 minutes.

Create a project when a client is ready to start work with the lab. You type the client's name on the same form, so you do not add the client anywhere first. A project is either a validation (the set of studies the lab runs for the client) or a lab build, which runs under a contract (section 2.14).

1 Select **New project**.

Where The page **Client projects** (select it in the menu on the left), at the top right.
You see The form **New client project** opens above the list of projects.
If different If the button reads **Close**, the form is already open. If there are no projects yet, the list reads **No client projects yet. Create the first one with New project.**

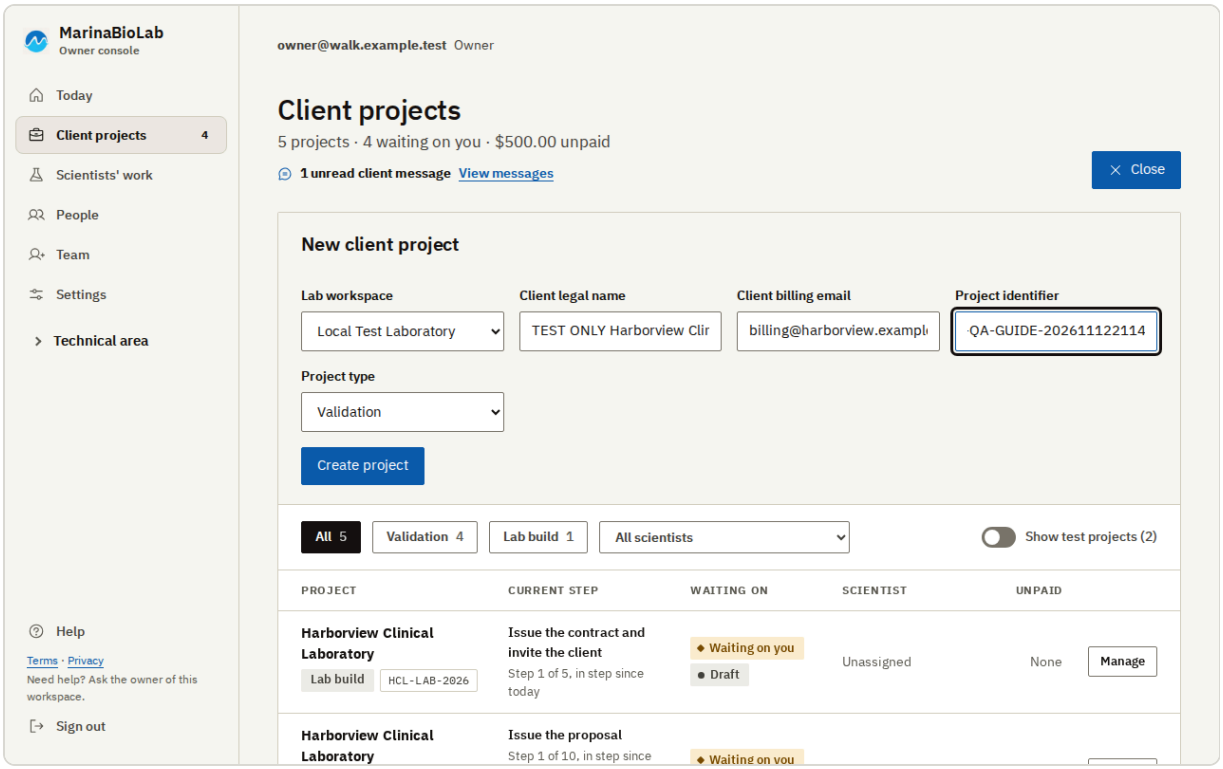


Figure 2.2 To open a project later, select **Manage** at the right end of its row in the list.

2 In **Lab workspace**, choose the lab workspace that owns the project. A lab workspace is the lab's own area of the system, with its team and its projects.

Where The first field of the form.
You see The workspace's name shows in the field. When the lab has only one workspace, the console chooses it for you.
If different If the list reads **No lab workspaces available**, your account does not belong to a workspace yet. Write to the support email address shown under **Help**. If **Help** shows **Get help** instead, ask the owner of the lab's workspace.

3 Type the client's legal name in **Client legal name**, then its billing email address in **Client billing email**.

Where The next 2 fields, under the first one.
You see Both fields filled.
If different Both fields must be filled in. The form will not create the project while either one is empty.

4. Type a short reference for the project in **Project identifier**. It can be up to 64 characters long, using letters, numbers, dots, underscores and hyphens, and it must start with a letter or a number.

   Where The fourth field.
   You see The reference in the field.
   If different If the reference is empty or breaks that rule, the form will not create the project. Correct the reference.

5. In **Project type**, choose **Validation** or **Lab build**.

   Where The last field of the form.
   You see Your choice shows in the field. For a lab build, the button below changes to **Create Lab Build**.
   If different You cannot change the type after the project is created. If you picked the wrong one, change it now.

6. Select **Create project** (it reads **Create Lab Build** for a lab build).

   Where The button below the fields.
   You see The message **Project created.** The new project opens in the draft state (not yet sent to anyone), with the client's legal name as its title.
   If different If you see **Enter a valid billing email address.**, the address in **Client billing email** has a mistake. Correct it and select the button again. If a red message appears with the button **Reload projects**, the project was not created, or the console could not confirm that it was. If the message names a problem, correct it and try again. If it gives no reason, select **Reload projects** and look for the project in the list before you try again, so you do not create it twice.

Checkpoint: you see **Project created.** and the new project is open, with the client's legal name as its title. If all of this matched, you are done with this section.

2.4

Read the project page

> You are here: the console, on the page **Client projects**. At the end you can read a project page and tell whose turn it is. About 10 minutes.

The project page shows where a project stands and whose turn it is. Open it whenever you work on a client's project.

1 Select **Manage** on the project's row.

Where The page **Client projects**, at the right end of the project's row.

You see The project page. Across the top, the header shows the project type, the project's reference (its identifier), its state, the client's legal name and how many steps are done.

If different If you see **This project is not in your client projects. Go back to Client projects and pick another.**, the web address you used points at a project that is not in your list. Open the project from **Client projects** instead.

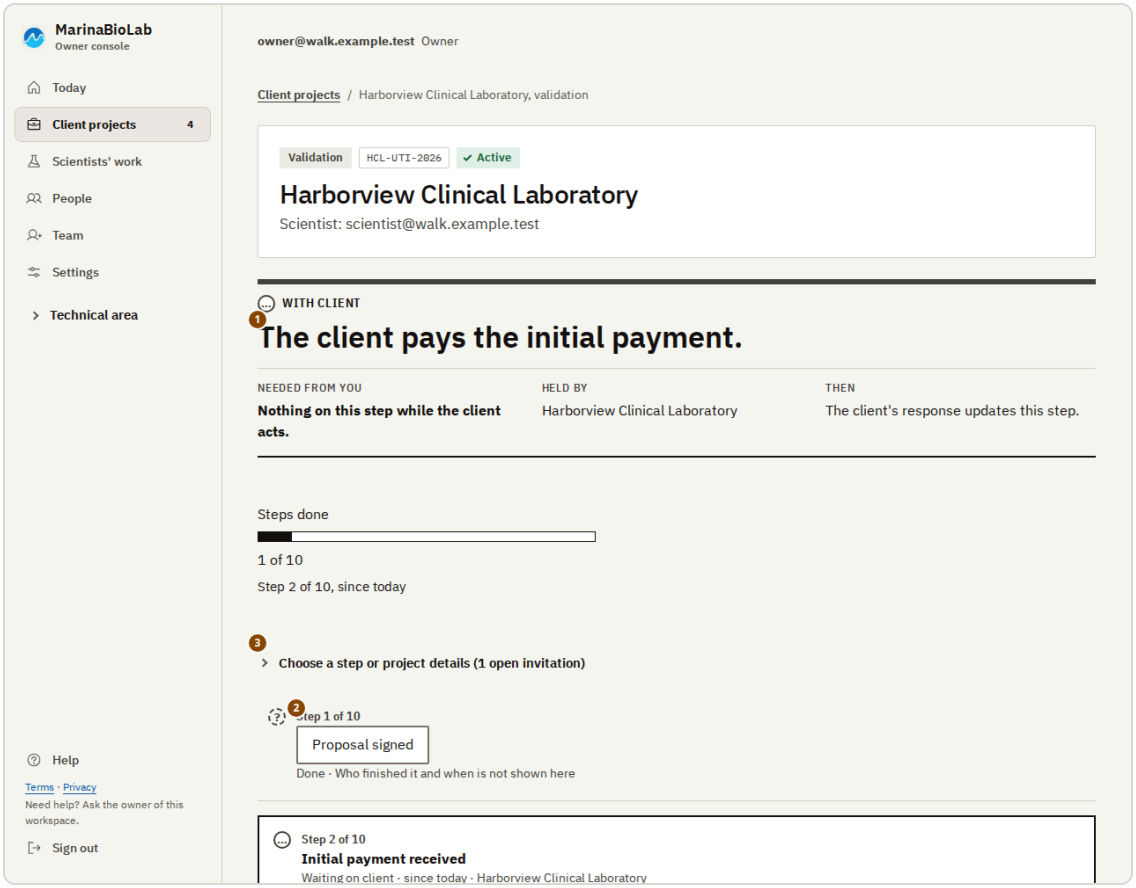


Figure 2.3 The box at the top (1) says whose turn it is. The steps run down the page (2). **Choose a step or project details** (3) opens the project's own pages.

2 Read the box at the top.

Where Under the project's name.

You see A tag that says whose turn it is, what is true now, what is needed, who holds the step (**Held by**) and what comes next. Under the box, the current step and how long the project has been on it, with **Go to this step**.

If different If the tag reads **Not confirmed**, the console could not check whose turn it is, and the box says **Whose turn it is could not be checked just now.** Open the step it names, or refresh the page.

3 Read the steps down the page.

Where Below the box.

You see Under **Earlier project steps**, one line for each finished step. Then the current step, open as its working form. Then **Later project steps**, which read **Not started**.

If different Select an earlier step to open it again, or a later one to read what it needs.

4 To open another step or the project's own pages, open **Choose a step or project details**.

Where The top of the project page.

You see The list of steps, then the project's own pages: **Client access**, **Team and activation**, **Messages**, **ClickUp** and **All steps and overrides**. While invitations are open, the line counts them, for example (2 open invitations).

If different In a narrow window the list opens as a sheet. Select **Close** to put it away.

Tag in the box	What it means
Your turn	The lab acts next. The box says what to do.
With client	The client acts next, in the MarinaBioLab Client Portal (the client's site, called the portal). You have nothing to do on it for now.
On hold	You paused the project (section 2.7). Its steps wait until you resume it.
Project closed	The project is canceled or archived. No one holds it.
Done	Every step is complete.

Each step has a chip (a small colored label) that shows its state: **Done**, **Your turn**, **Waiting on client**, **Not started**, **Not needed** or **Blocked**. The list under **Choose a step or project details** shows the same states, except that a step that has not started shows nothing there, and a waived step reads **Waived**. A validation project has the 10 steps in the table below. A lab build has 5 (section 2.14).

Step	Who acts	What completes it
1 **Proposal signed**	You build and issue the proposal. The client reads it and signs it in the portal.	The client's signature.
2 **Initial payment received**	You publish the payment link or record a payment. The client pays.	The initial payment received in full, or the step completed by hand.
3 **Pre-Check signed**	You create and approve the Pre-Check. The client fills it in and signs it.	Only the client's signature.
4 **Kickoff meeting held**	You book the meeting and record that it took place. The client joins.	The meeting's outcome recorded as held.
5 **Validation plan signed**	You write and issue the validation plan (what the validation will cover). The client signs it in the portal.	Only the client's signature.

Step	Who acts	What completes it
6 **Site visits**	You book each site visit to the client's lab and record it. The client hosts the visit.	A visit recorded as completed, with no other visit still open, after the client has acknowledged its dates in the portal. Or the step marked not needed (for remote work), or completed by hand.
7 **Validation studies**	The scientist runs the studies in the workbench and approves the client copy of the report (the version made for the client). The client follows the progress.	Closes by itself when every workbench validation bound to (linked with) the project has an approved client copy. That opens the final payment.
8 **Report release**	You publish the approved report (on step 10). The client follows the progress.	Closes by itself once every coverage combination (study, instrument, medium, storage and timepoint) in the signed validation plan (section 2.10) has been delivered in a published report. Nothing else waits on this step.
9 **Final payment**	You publish the payment link or record the payment. The client pays.	The final payment paid in full, waived with a second owner's approval, or recorded as not required.
10 **Report published**	You publish the approved report. The client downloads it.	The final payment done, and every coverage combination in the signed validation plan delivered in a published report.

Checkpoint: you opened a project, read its box at the top and opened a step. If all of this matched, you are done with this section.

2.5

Invite the client's people

> You are here: the console, on a project page. At the end the client's people have invitations to the portal. About 10 minutes.

People at the client can open the portal only through an invitation to a project. As soon as the project exists, invite everyone who will sign, pay or follow it.

Invite a person

1. Select **Client access**.

   Where The project page: open **Choose a step or project details**, then **Client access**.

   You see The invitation form at the top, then the lists **People with access** and **Emails** further down.

   If different You see the list **Open invitations** only while an invitation is waiting to be accepted.

2. Type the person's email address in **Invite client email**. Use the address they will sign in to the portal with.

   Where The top of the page.
   You see The email address in the field.
   If different While the field is empty, the console may offer the billing email you entered for this project, with a button. It only fills the field. Nothing is sent until **Invite client**. The invitation works only for the address you type here. If you are not sure which address the person uses, ask them before you select **Invite client**.

3. Under **Client roles**, check the box for each role the person will have.

   Where Below the email field. The roles are **Primary contact** (the client's main person), **Signer** (can sign documents) and **Billing** (sees invoices and payments).
   You see A check mark beside each role you chose. **Primary contact** is already checked when the form opens.
   If different You cannot clear the last checked box, because every invitation needs at least one role. To swap roles, check the new role first, then clear the old one.

4. Select **Invite client**.

   Where The button beside the email field.
   You see The message **Invitation created.** and a card that shows the email address, the roles, how the invitation is delivered and when it expires. An invitation lasts 7 days.
   If different If you see **Enter a valid email address.**, the address has a typing mistake. Correct it and select **Invite client** again. Any other red message says why the invitation was not created. Fix what it names and try again.

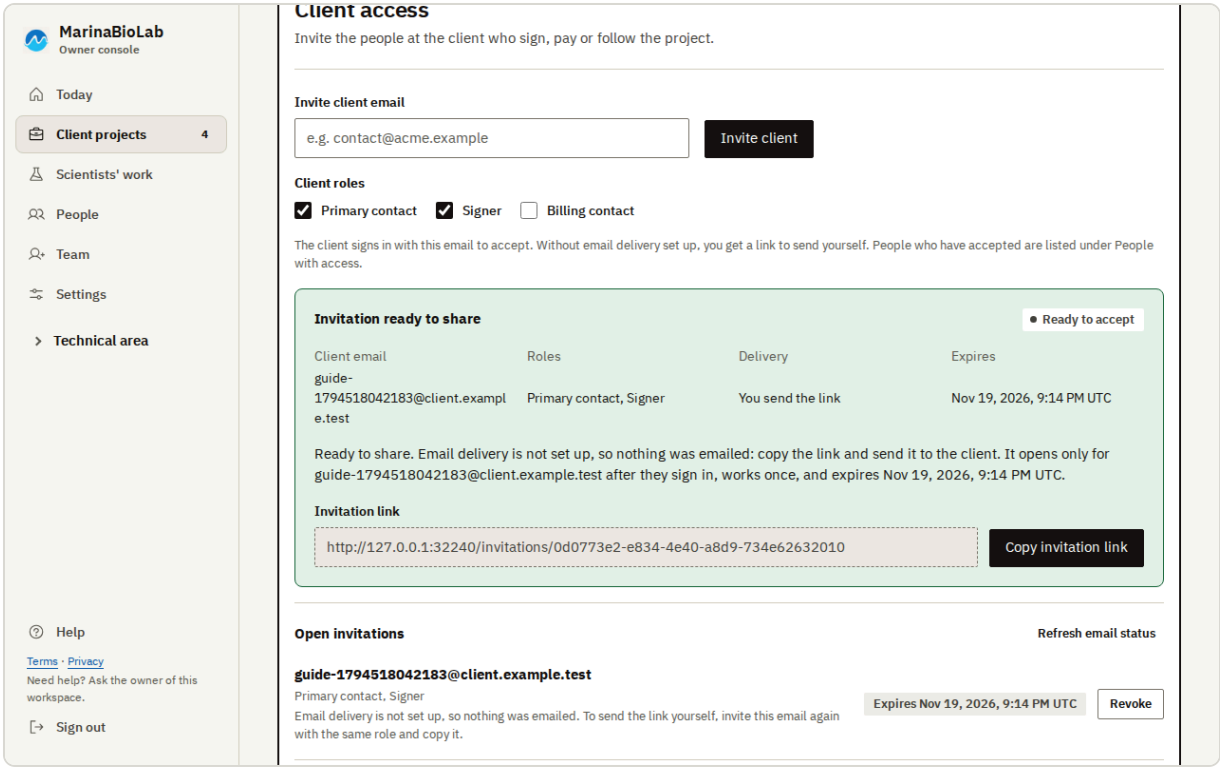


Figure 2.4 The card under the form tells you whether the system emailed the invitation or left the link for you to send.

5 If the card reads **You send the link**, select **Copy invitation link** and send the link to the person yourself, for example by email.

Where	The invitation card headed **Invitation ready to share**, on the line **Invitation link**.
You see	The button changes to **Copied**.
If different	If **Delivery** reads **Email**, the system has sent the invitation for you. If the card reads **Waiting for email**, the email is in a queue and its link does not work yet. Come back later and select **Refresh email status** under **Open invitations**. If no email has gone out after 15 minutes, invite the same email address again with the same roles. That gives you a link you can send yourself.

The person accepts by signing in to the portal with the invited email address. The link works only once. After that, **People with access** lists the person with their roles and the date. Until someone accepts, the list reads **No one has accepted an invitation to this project yet. People appear here once they accept.** To make someone else the primary contact, select **Make primary contact** on their row, type a reason, then select **Make primary contact** again to confirm.

Revoke an invitation

Revoking cancels an invitation that nobody has accepted yet. On the invitation's row under **Open invitations**, select **Revoke**. Type the reason in **Why revoke it (audited)**, then select **Revoke invitation**. (**Keep it** leaves the invitation open.) A line confirms that the invitation is revoked and its link no longer works. If a red message says the revocation was not confirmed, revoke it again. A row marked **Expired** has a link that no longer works. To give that person a new link, invite the email address again.

Remove a person's access

> **CANNOT BE UNDONE**
> After you remove a person from a project, the console cannot give the access back, and that person cannot accept a new invitation to the same project. Check that you have the right name first.

On the person's row under **People with access**, select **Remove access**. A review opens with **Person**, **Roles they lose** and **What happens**. Type a reason in **Reason (kept in the audit trail)**, then select the red **Remove access** button. The person loses the project in the portal straight away, but everything they did stays on record. While the project is invited, active or on hold, the project's only primary contact has no remove button. Make another person the primary contact first.

At the bottom of **Client access**, the list **Emails** shows every email the project has sent or tried to send. Each one has a chip, **Queued**, **Sent**, **Failed** or **Skipped**, and a sentence that says why. Invitation emails are listed under **Open invitations** instead. To send a failed or skipped email again, select **Resend** on its row, type a reason, then select **Resend email**. If the list says **Mail is not switched on**

yet, so no email is sent. Emails wait in the queue until it is., nothing goes out until the lab's outgoing email is switched on. Ask the person who runs the lab's server to switch it on.

Checkpoint: the card under the form shows each invitation, and **People with access** lists everyone who has accepted. If all of this matched, you are done with this section. Take a break before the next one.

2.6

Build and issue the proposal

> You are here: the console, on a project page, with the project still in the draft state. At the end the proposal is issued and waiting for the client's signature. About 20 minutes.

The proposal is the document that sets a validation's scope, price and payment plan. You build it in the console, and the client reads and signs it in the portal. Once it is signed, the console uses it to set the payment terms and to start a draft of the Pre-Check. Lab build projects use a contract instead (section 2.14).

Build the draft

1 Select step 1, **Proposal signed**.

Where The project page, in the steps, or under **Choose a step or project details**.

You see The form **Validation Proposal**, with the chip **No proposal yet** at the top. Under **Client**, the client's legal name and today's date are already filled in.

If different If you see a notice about unsaved changes kept in this browser, with **Restore my changes** and **Discard my changes**, pick one of them before you type anything.

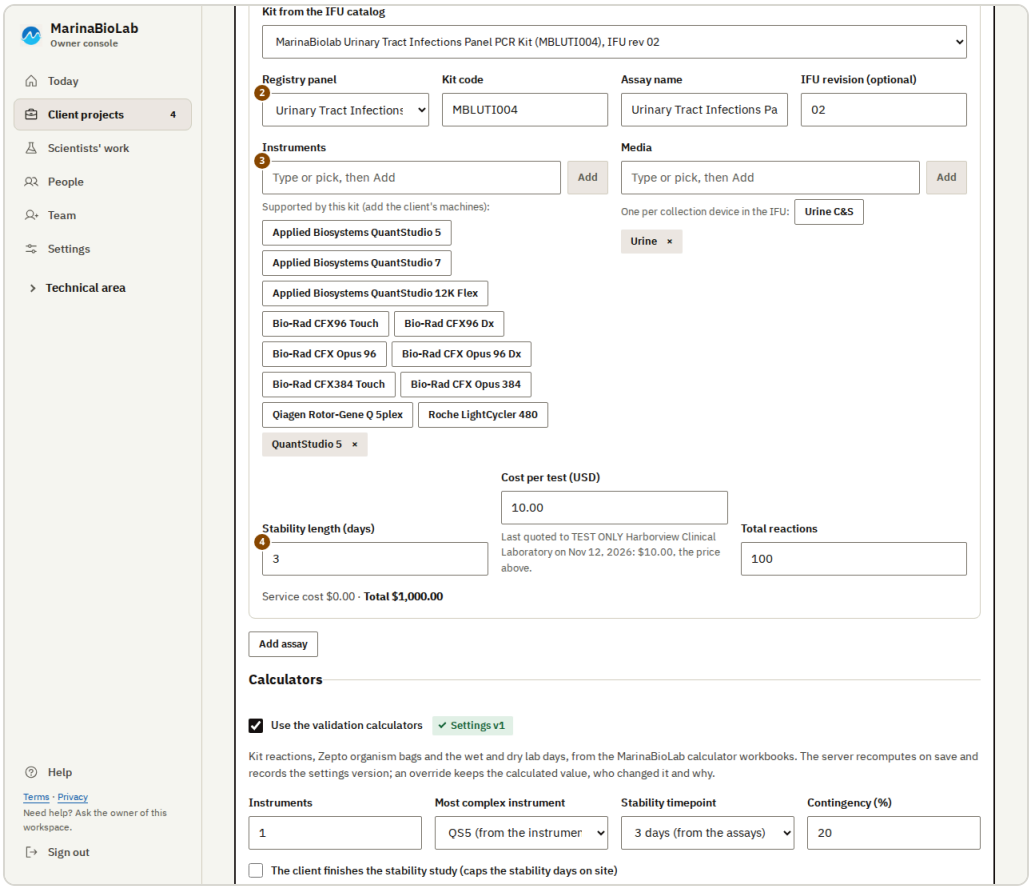


Figure 2.5 One assay (2 to 4) prices one kit. Kits that can be issued come first. The line beside **Cost per test** shows the last price quoted for the kit.

2 In **Kit from the IFU catalog**, choose the client's kit.

Where Under **Validation request and costs**, in the first assay. (An assay here is one kit you are pricing.)

You see Kits that can be issued come first, under **Can be issued**. **Kit code** and **Assay name** fill in by themselves. The instruments and sample types listed in the kit's Instructions for Use (IFU, the kit maker's manual) are offered under **Instruments** and **Media**.

If different A kit listed under **Cannot be issued yet** can be saved in a draft, but the proposal cannot be issued with it, and a line under the picker says why. If the list reads **IFU catalog unavailable; enter the kit below**, type the kit code and the assay name yourself.

3. Type each of the client's instruments in **Instruments**, and each sample type in **Media**. Select **Add** after each one.

   Where Below the kit fields.
   You see Each value appears as a small tag with a button to remove it.
   If different An empty list reads **None yet**, and the draft will not save while a list is empty. Each assay needs at least one instrument and one sample type.

4. Type the assay's numbers in **Stability length (days)**, **Cost per test** (the label also shows the currency) and **Total reactions**.

   Where The last row of the assay.
   You see A line under the assay with the service cost and the assay's total. Under **Cost per test**, the last price you quoted for this kit may show, with the client and the date, in a line that starts **Last quoted to**. A draft's price is never offered, and the price is never applied for you.
   If different If the stability length is more than 3 days, the line adds an extended-stability fee for each sample type. If you see **Enter the amount with digits and a decimal point only, for example 12.50.**, **Cost per test** has a currency symbol or a comma in it. Remove it. To price another kit, select **Add assay** and repeat steps 2 to 4.

5. In the column **Size**, choose **Small** or **Large** for each panel (the set of targets a kit detects).

   Where Under **Calculators**. On a new proposal, **Use the validation calculators** is already checked.
   You see A results table with a row for each panel. The day counts under **Timeline** fill in by themselves and cannot be edited.
   If different While the box is checked and a size is missing, the draft will not save. If you would rather type the day counts yourself, clear the box.

6. Choose **Full payment upfront** or **Refundable deposit + balance**. For a deposit, set **Deposit type** and the percentage or amount beside it, then fill in **Refund window (days before the on-site date)**.

   Where Under **Payment structure**, below **Timeline**.
   You see The totals strip at the bottom of the form shows what is due first and what is left to pay. A new proposal starts with a 50% deposit and a 14-day refund window.
   If different If you chose **Full payment upfront**, the deposit fields disappear, and the strip shows **Due upfront** in place of the 2 amounts.

7. If the client will pay by card through Shopify (the lab's online store), leave **Prepare signed Shopify order prices** checked, then fill in **Quoted service total** and a unit price for every reagent line. If the client will not pay through Shopify, clear the box.

   Where Under **Quoted reagent prices**, near the bottom of the form. The box is already checked on a new proposal.
   You see When the prices add up to the project total, a line says that they reconcile (match). A button that starts **Price included items at 0** prices the included items at 0 and sets the service total to what is left. It never changes a price you typed.
   If different Until the prices match, a list names what is missing, and you cannot issue the proposal. Type 0 for an item that is included at no charge. The reagent lines come from the calculators (step 5). If you clear the box, the client pays by wire, check or ACH (bank transfer).

8. Select **Save draft**.

   Where The bottom of the form.

   You see The message **Draft saved. Review the preview, then issue it to the client.** The chip reads **Draft, not issued**, followed by the version number.

   If different If you see **Each assay needs a kit code, name, at least one instrument and one medium, and valid price and deposit amounts.**, the draft was not saved. Fill in what it names and save again. The button is grayed out when nothing has changed. After the first save it reads **Save as new draft**.

To replace a number the calculators worked out, select **Override** beside it, type your value and a reason, then select **Apply override**. If a red message says the calculators could not run, select **Try the calculators again**. The calculators take their starting numbers from the lab's saved settings (section 2.16).

Preview and issue

1. Select **Preview document**.

   Where The bottom of the proposal form.

   You see The saved proposal, laid out the way the client will read it.

   If different If you see **Unsaved changes. The preview shows the last saved version.**, close the preview and save first.

2. Select **Issue to client**.

   Where Beside the save button.

   You see A window asks **Issue this proposal to the client? They can then read and sign it in the portal.**

   If different If the button is grayed out, the reason is written beside it. For **Save your changes first.** or **Only a saved draft can be issued.**, save the draft first. For a reagent price that is missing, the reason names the field and takes you to it: type the price (0 for an included item) and save.

3. Select **Issue proposal** to send it.

   Where The confirmation window.

   You see The message **Issued. The client can now read and sign the proposal in the portal.** The chip now begins **Issued, awaiting client signature**.

   If different To go back without issuing, select **Cancel**.

When the client signs, the chip begins **Signed by client** and step 1 shows **Done**. A block headed **Signed electronically in the client portal** shows who signed, their email address and the time. The form folds away under **Signed proposal details**. The console records the payment terms and saves a first Pre-Check draft, unless the project already has one.

Change a signed proposal

If the scope, price or payment terms change after the client has signed, you make a change order. A change order is a new version of the proposal that the client reads and signs in the portal. Its terms replace the signed version only when the client signs it, and the console then matches the payments to the new terms. Payments the lab has already received stay credited.

1. Select **Start change order**.
   - **Where** Step 1, under the record of the signature.
   - **You see** The proposal form opens for editing.
   - **If different** To drop your edits and go back to the signed version, select **Discard changes**.

2. Make your changes in the form, then select **Save change order**.
   - **Where** The bottom of the form.
   - **You see** **Change order saved. Review the preview, then issue it to the client to sign.**
   - **If different** The same checks apply as for a first draft above.

3. Select **Issue to client**, then **Issue change order** in the confirmation window.
   - **Where** The bottom of the form.
   - **You see** **Issued. The client can now read and sign the change order in the portal.**
   - **If different** To go back without issuing, select **Cancel**.

Attach a statement of work (SOW) file

A statement of work (SOW) is a document that describes the work. Use **Attach a separate SOW file**, under the proposal form, only to store a statement of work written outside the console. Uploading one replaces a proposal draft that has not been issued, and you cannot issue the uploaded file or have the client sign it. To attach one, choose a PDF or DOCX file of up to 3 MB in **SOW file**, then select **Upload SOW**. The file and its name must not contain any patient identifiers.

Checkpoint: the chip reads **Issued, awaiting client signature**. When the client signs, it reads **Signed by client** and step 1 shows **Done**. If all of this matched, you are done with this section. Take a break before the next one.

2.7

Assign the team and activate the project

> You are here: the console, on a project page, with the proposal issued. At the end the project has its staff and is active. About 15 minutes.

A new project starts as a draft, and the client cannot do anything with it yet. Activating the project starts the client's work in the portal. Before you can activate it, the project needs its staff and a published engagement setup. The engagement setup is the message the client receives and the document they may open. If that document is the proposal, issue the proposal first (section 2.6).

Assign the project staff

1. Select **Team and activation**.

   Where The project page: open **Choose a step or project details**, then **Team and activation**.

   You see **Project status** with the project's state, then **Before activation**, **Project staff** and **Engagement setup**.

   If different If the section headed **Project activation** is folded shut, select its heading to open it.

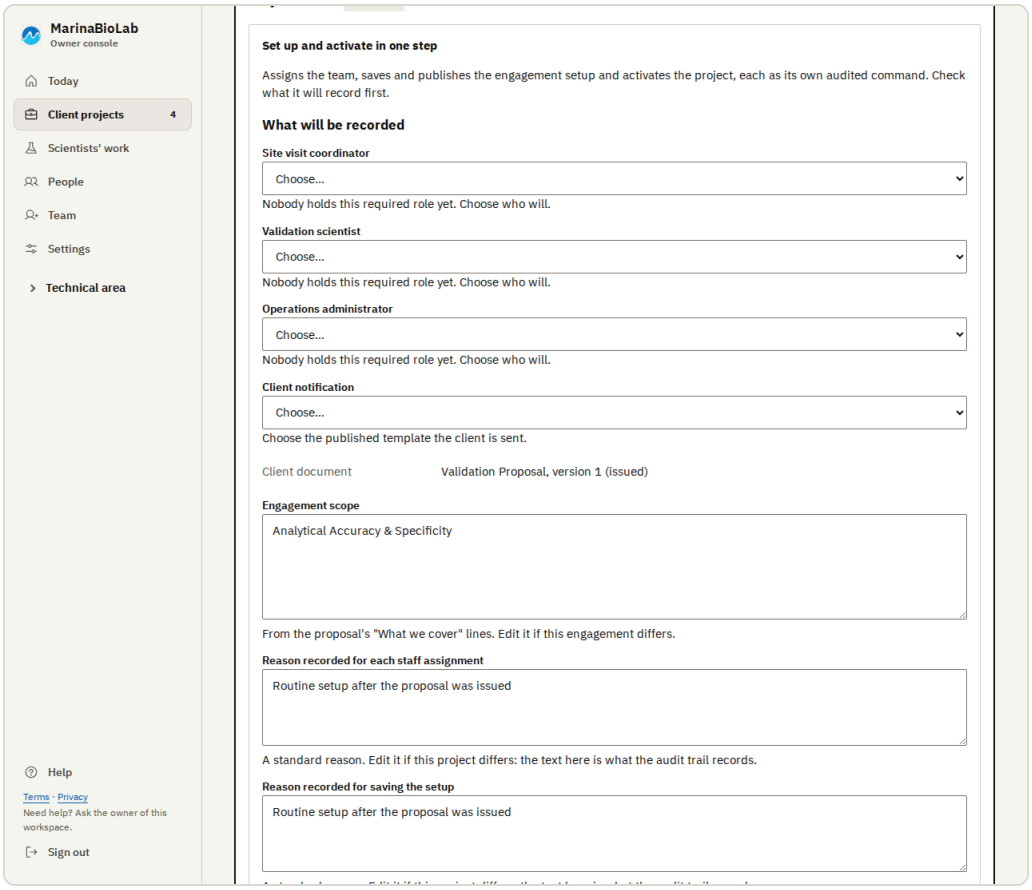


Figure 2.6 Set up and activate in one step shows what it will record before you press. Activation starts the client's steps in the portal, not its payments.

2. In **Staff member**, choose the person you want on the project.

   Where Under **Project staff**, in **Assign a staff member**.

   You see The person's email address, with their role in the lab.

   If different If you see **No active staff members are available in this lab workspace.**, invite the person on the **Team** page first (section 2.15).

3. In **Role on this project**, choose what the person will do on this project.

   Where To the right of **Staff member**.

   You see One of **Validation scientist**, **Lab build lead**, **Finance owner**, **Site visit coordinator** or **Operations administrator**. In the staff table, the roles this project must have are marked **Required**.

   If different On a completed, canceled or archived project, the 2 lists are grayed out and cannot be changed.

4. Type the reason in **Assignment reason (audited)**, then select **Save staff assignment**.

   Where Below the 2 lists.
   You see A line that begins **Staff assignment saved**, and the role marked **Assigned** in the table.
   If different If you see **This staff member already has that assignment.**, there is nothing to add. If you see **This role already has a valid staff assignment. Existing authority was preserved.**, someone else already holds that role on this project. To change who holds it, use **Hand over or end a role** (below). If more roles are still marked **Required**, repeat steps 2 to 4 for each one.

To hand a role to someone else, or to end a role the project does not need, open **Hand over or end a role**. Choose the role in **Role to hand over or end** and the new holder in **Who takes the role**, or **Nobody: end this assignment**. Type the reason in **Reason for the change (audited)**, then select **Save role change**. The record keeps who held the role before. A role the project's workflow requires cannot be left empty: hand it to someone instead.

Both project types sync with ClickUp, the lab's task tracker. After a scientist is assigned, select **ClickUp** under **Choose a step or project details** and open **ClickUp settings**. Type the client's **Site ID** and the scientist's ClickUp member ID exactly as ClickUp shows them, then select **Save ClickUp settings**.

Set up and activate in one step

Set up and activate in one step does the setup work in one press: it assigns the staff you choose, saves and publishes the engagement setup and activates the project, each as its own audited command, as if you had pressed it yourself.

1. Read **What will be recorded**.

   Where **Team and activation**, under **Set up and activate in one step**.
   You see Each required role with the person who will hold it (a role with one possible person is chosen for you), the **Client notification** (the published template the client is sent), the **Client document** and the **Engagement scope**, filled in from the proposal's What we cover lines.
   If different If the block reads **Not available yet**, something it needs is missing, for example a published notification template, and the block says what. Use the step-by-step form below instead.

2. Check the reasons. When the box shows, check **I have reviewed and approve this engagement setup.**

   Where The same block. Each reason box holds a standard reason that you can edit. What the box says is what the audit trail records.
   You see The list **When you press, in this order**, with each action. The box shows only when the press publishes a setup, and it is never checked for you.
   If different If a required role reads **Nobody holds this required role yet. Choose who will.**, choose the person first.

3. Select **Set up and activate**.

   Where The bottom of the block.

   You see Each action marked as it is recorded, then a line that begins **Set up and activated** and says how many commands are recorded in the audit trail. The project's state is active, and the client can start work in the portal.

   If different If the server refuses an action, the press stops there. The block says what was recorded before it stopped and what the server named. Fix that, then press again: it goes on from what is now recorded.

Set up the engagement step by step

The older form stays below the one press, for a setup you write yourself, such as your own client notification or another document.

1. Open **Set up the engagement**, then make a choice in **Notification source** and in **Document access source**.

   Where Under **Engagement setup**.

   You see For the notification: a published template to pick, or a subject and body to write yourself. For the document: the issued proposal (nothing more to fill in), a published access policy (a saved rule for which client roles may download a document and which payments it waits on), or a project document with its client roles and payment rule.

   If different Once a setup exists, the heading reads **Change the engagement setup**. You can choose the proposal as the document only after you have issued it.

2. Fill in the fields that your 2 choices opened. For a validation project, also describe the work in **Engagement scope**.

   Where The setup form.

   You see Your entries in the form.

   If different Some choices need nothing more and open no field. The issued proposal is one of them.

3. Type the reason in **Setup reason (audited)**, then select **Save activation setup draft**.

   Where The bottom of the setup form.

   You see A line that begins **Activation setup saved as a draft**, and the saved setup laid out so you can review it.

   If different If a red message appears, it says why the setup was not saved. Correct what it names and save again.

4. Check the box **I have reviewed and approve this exact saved engagement setup.**, type the reason in **Publication reason (audited)**, then select **Publish reviewed activation setup**.

   Where Under **Review saved engagement setup**.

   You see A line that begins **Activation setup published**.

   If different You see the review form only while the setup is a draft.

5 Type the reason in **Activation reason (audited)**, then select **Activate project**.

Where The bottom of the section, under **Activate project**.

You see A line that begins **Project activated**. The project's state changes to active, and the client can start work in the portal.

If different **Activate project** stays grayed out until the section reads **Everything is in place. Activating starts the client workflow. It does not open payments by itself.** Until then, finish each item still listed under **Before activation**. If it lists **The activating staff member needs an explicit active project assignment.**, you need a role on this project yourself. Give yourself one in steps 2 to 4 of "Assign the project staff", for example **Finance owner**.

Pause and resume a project

Pause a project that waits on something outside the portal, such as a client's decision or a delivery. At the foot of **Team and activation**, open **Pause this project**, type the reason in **Reason for pausing (recorded)**, select **Pause project**, then **Pause project** again in the window (**Keep the project as it is** backs out). You see **Project paused. It is on hold until you resume it.** The project reads **On hold**, and no reminders or notification emails go out for it. A meeting or visit you schedule or change still updates its calendar invitation. The client still sees the project and reads **This project is on hold. MarinaBioLab will contact you about the next step.** Its published documents cannot be downloaded until you resume it, except the signed agreements. To resume, type the reason in **Reason for resuming (recorded)**, select **Resume project**, then **Resume project** again in the window. You see **Project resumed. It is active again.**

Cancel, archive or restore a project

Canceling stops a project. Archiving puts a completed or canceled project away. Restoring brings an archived project back. At the bottom of **Team and activation**, open **Cancel or archive this project** and type the reason in **Reason (recorded)**. A button that begins **Use the usual reason** puts the lab's usual reason for that move in the box. Edit it if the project differs. Select **Cancel project**, **Archive project** or **Restore project**, then the button with the same name in the window that opens (**Keep the project as it is** backs out). You can cancel a project that is a draft, invited, active or on hold. You can archive a completed or canceled project, and restore an archived one. In the portal, the client then finds a canceled or archived project under **Show canceled and archived projects**. Its documents, payments and history are kept, and published documents stay available to the client under the usual access and download checks. You cannot reopen a canceled project, and a restored project goes back to completed or canceled, never to active.

Checkpoint: you see a line that begins **Set up and activated**, or **Project activated** with the step-by-step form, and the project's state is active. If all of this matched, you are done with this section. Take a break before the next one.

2.8
Payments

> You are here: the console, on a project page. At the end you can publish a Shopify payment link, record a payment that came in another way, and waive or hold a payment. About 20 minutes.

Steps 2 and 9, **Initial payment received** and **Final payment**, both open the same page, **Payment terms**, with that step's row highlighted. If the client pays a refundable deposit, the page calls the initial payment the refundable deposit and the final payment the balance. The console records a validation project's payment terms when the client signs the proposal. To change them later, use a change order (section 2.6). If no payment terms are recorded and no proposal is waiting for a signature, the page shows the form **Payment structure** instead. There, choose **Full upfront** or **Refundable deposit + balance** and type the **Contract total**. For a deposit, also type the deposit percentage or amount. Then select **Record payment structure**.

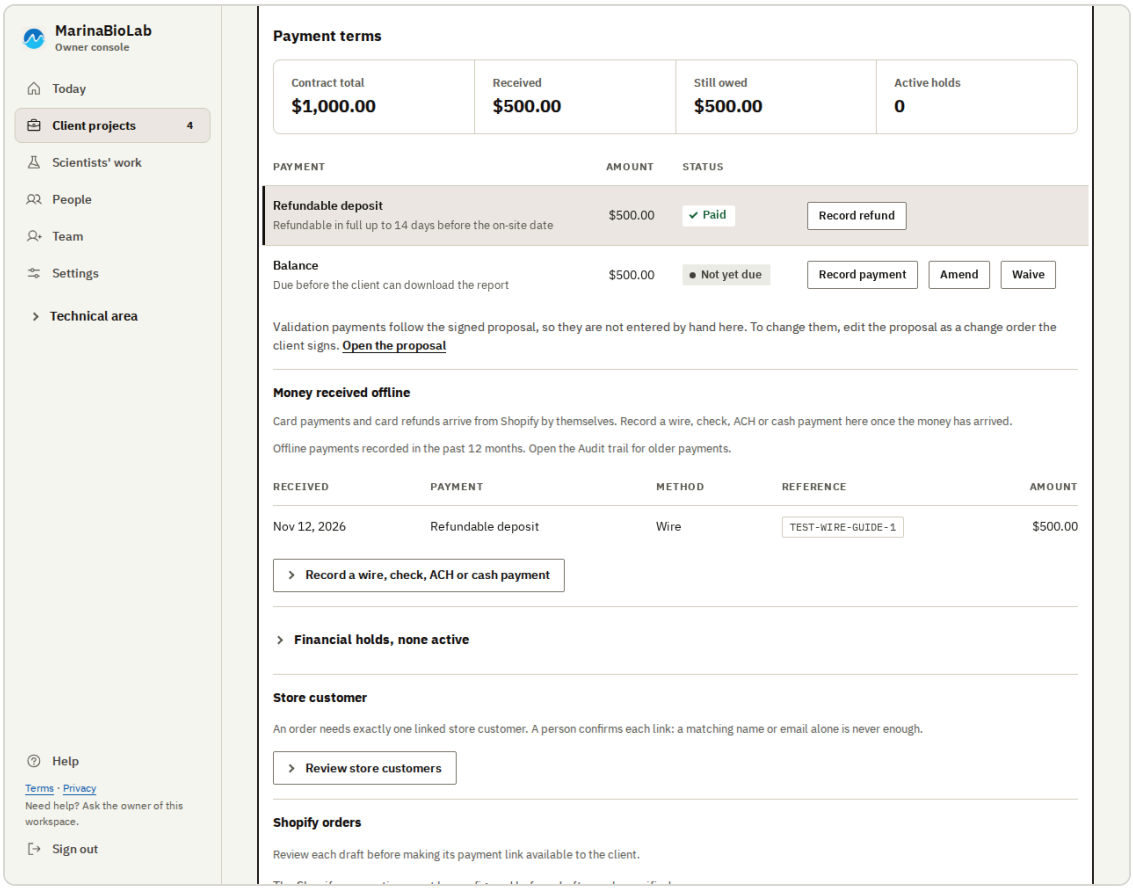


Figure 2.7 The buttons on a row depend on its state. **Record payment** shows while money is owed, and **Record refund** once money has been received. **Amend** and **Waive** show on the final payment (the balance) only.

Status of a payment	What it means
Not yet due	The payment exists, but the client is not asked to pay it yet.
Due	The client is asked to pay now. The portal shows the same word.

Status of a payment	What it means
An amount, then **still owed**	Part of the payment has arrived.
Paid	The full amount has arrived.
Waived	A second owner approved letting go of the final payment.
Refunded or **Partly refunded**	Money went back to the client. The amount returned shows below the word.
Not required	The final payment was recorded as not required under the initial terms.

Record refund records money you have already paid back to the client outside the card system. **Amend** adds a charge to the final payment or sets a new balance. Both forms ask for a reason.

Publish the Shopify payment link

Shopify is the lab's online store, and card payments made there show up here by themselves. The client can pay by card only when the signed proposal carries store prices (section 2.6) and you have checked the order here. The client's people can see a linked customer's store orders in the portal, so link only the store customer who buys for this client.

1. Open **Review store customers**.
   - **Where** The page **Payment terms**, under **Store customer**.
   - **You see** The store customers that match this client, and a line saying how many are linked.
   - **If different** The search looks for the client's billing email address, the email addresses of the people with access to the project, the company name and the lab pricing tag. If no customer matches, correct those details on the customer's record in Shopify, then select **Search the store again**.
2. Select **Link** on the customer who buys for this client, then **Link this customer** in the window that opens.
   - **Where** The customer's row in the list.
   - **You see** The row is marked as linked.
   - **If different** If a customer shows **Linked to another client. Unlink it there first.**, you cannot link it here. An order needs exactly one linked customer, so select **Unlink** on any extra one.
3. Check the order: the store customer, the lines and the total.
   - **Where** Under **Shopify orders**, inside **View order lines** on the order. The store customer is under **Technical details**. Both open by themselves when an order is ready for review.
   - **You see** Each quoted item with its quantity, unit price and total, then the order total, and **Confirmed store customer, linked with the draft** with the Shopify customer number.
   - **If different** If there are no lines to check, the order is not ready yet, and its status says why, for example **Waiting for a store customer**. If the row offers **Prepare eligible order**, select it, wait a moment, then select **Refresh**.

4. Check the box **I reviewed this store customer, these lines and this total.**, then select **Publish payment link**.

   Where Under the order's lines.
   You see The message **Publication requested. Refresh to confirm the order is available in the client portal.**
   If different If the order's link must be renewed, the button reads **Renew payment link** instead. If you see a notice that starts **The client cannot pay online yet: the signed proposal has no Shopify order prices.**, add store prices in a change order (section 2.6) and have the client sign it.

5. Wait a moment, then select **Refresh**.

   Where The top of the page **Payment terms**.
   You see The order reads **Published to the client portal**. The client can now pay from the portal.
   If different If the status has not changed, wait and select **Refresh** again, or reload the page in your browser.

Record a wire, check, ACH or cash payment

Record a payment only after the money has arrived in the lab's account. Never enter card payments here, because they come in from Shopify by themselves.

1. Select **Record payment** on the payment's row.

   Where The page **Payment terms**, in the table of payments.
   You see The form under **Record a wire, check, ACH or cash payment** opens, with that payment already chosen in **Payment**.
   If different A row with nothing owed has no button for this.

2. In **Method**, choose wire, check, ACH, cash or other. Then type the amount in **Amount received**.

   Where The form under **Record a wire, check, ACH or cash payment**.
   You see **Method** starts empty, so you always choose it. Beside the amount, a button such as **Fill in the $500.00 still owed** types the exact amount still owed on the chosen payment.
   If different You can record part of a payment: type the amount that arrived, and the rest stays owed. If the amount is more than what is owed, a message tells you the most you can enter.

3. Type the wire or check number in **Reference (wire or check number)**. Check **Date received**.

   Where The same form, under the method and the amount.
   You see **Date received** starts on today. Change it to the day the money arrived.
   If different The date cannot be in the future. Use the day the money arrived.

4. Select **Save payment**.

   Where The bottom of the form.

   You see The message **Offline payment recorded. The payment is settled; financial holds and other document checks still apply.** with the payment's details and the button **View this audit entry**. The form then moves to the next payment still owed, or closes when nothing is owed.

   If different For part of a payment, the message starts **Part payment recorded.** instead. If the button now reads **Send it again unchanged**, the console got no answer when it saved. Select **Send it again unchanged**. The payment is recorded only once, however many times you send it.

Waive a final payment

A waiver lets go of what the client still owes on the final payment. One owner asks for the waiver, and a second owner approves it.

1. Select **Waive** on the row of the final payment (the balance).

   Where The page **Payment terms**, in the table of payments.

   You see A form that shows the amount that will be let go.

   If different The button shows only on a final payment that is still owed, has no refund on it and has no waiver waiting.

2. Type the reason in **Reason**, then select **Request waiver**.

   Where The waiver form.

   You see The message **Waiver requested. A second owner approves it before the balance is waived.** Nothing changes for the client yet.

   If different If you see **Say why the balance is waived. The reason is part of the record.**, the reason field is empty. Type a reason and select the button again.

3. If you are the second owner, select **Review waiver**.

   Where The page **Payment terms**, on the notice about the requested waiver. The notice reads **You can approve it as the second owner.**

   You see The details of the waiver that your approval will record.

   If different If you see **Waiting for a second owner to approve it. The owner who asked cannot approve it.**, you are the owner who asked. Another owner must approve it.

4. Select **Approve waiver**.

   Where The review that opened in the last step.

   You see A confirmation that starts **Waiver approved:** and says the client no longer owes the amount. The payment's status reads **Waived**.

   If different If a payment arrived while you were reviewing, the review shows what changed, and nothing is waived until you approve again.

Financial holds

A financial hold blocks the client's access to whatever depends on a payment, for example the report download. You record one after a refund, dispute or loss notice that came from outside the system. A hold does not change the payment record. A payment provider showing the payment as paid does not clear a hold either.

To record a hold, open the line **Financial holds** (it reads **Financial holds, none active** while there are none), then open **Record an external notice and hold**. Choose the payment in **Payment**, then fill in **External source**, **External reference**, **When it was observed (your local time)**, **Reason** and **Evidence reference**. In **Evidence file fingerprint**, paste the 64-character fingerprint (SHA-256) of the evidence file. A checksum tool makes this fingerprint from the file. Check the box **I am responsible for Finance review of this notice.**, then select **Record hold and block access**.

To clear a hold, open **Review and resolve an active hold**. Choose the hold in **Active hold**. In **Disposition**, choose **False alarm verified** or **Underlying financial loss resolved** (the second one asks you to check a box to confirm). Fill in **Finance reason**, **Finance evidence reference** and **Finance evidence file fingerprint**, then select **Record Finance resolution**.

Checkpoint: the page **Payment terms** shows each payment with the right status, such as **Due** or **Paid**. If all of this matched, you are done with this section. Take a break before the next one.

2.9

The Pre-Check (client checklist)

> You are here: the console, on an active project. At the end the client has an approved Pre-Check to fill in, and you know how to follow up on their answers. About 15 minutes.

The Pre-Check is the list of questions the client answers and signs before the validation starts. The console also calls it the client checklist, and the portal calls it the checklist. You create it and approve it. Then you follow up on anything the client answered No or left unchecked.

Create and approve the Pre-Check

1. Select step 3, **Pre-Check signed**.

   Where The project page, in the steps.

   You see 3 parts, from top to bottom: a heading that begins **Pre-Check follow-ups**, then **Client checklist responses** and **Client checklist setup**. When the client has signed the proposal, the console has already saved a draft from it, and the draft can be open under the table of versions.

   If different If no checklist is assigned yet, the step reads **Your turn** and offers the link **Go to Create Pre-Check from proposal**.

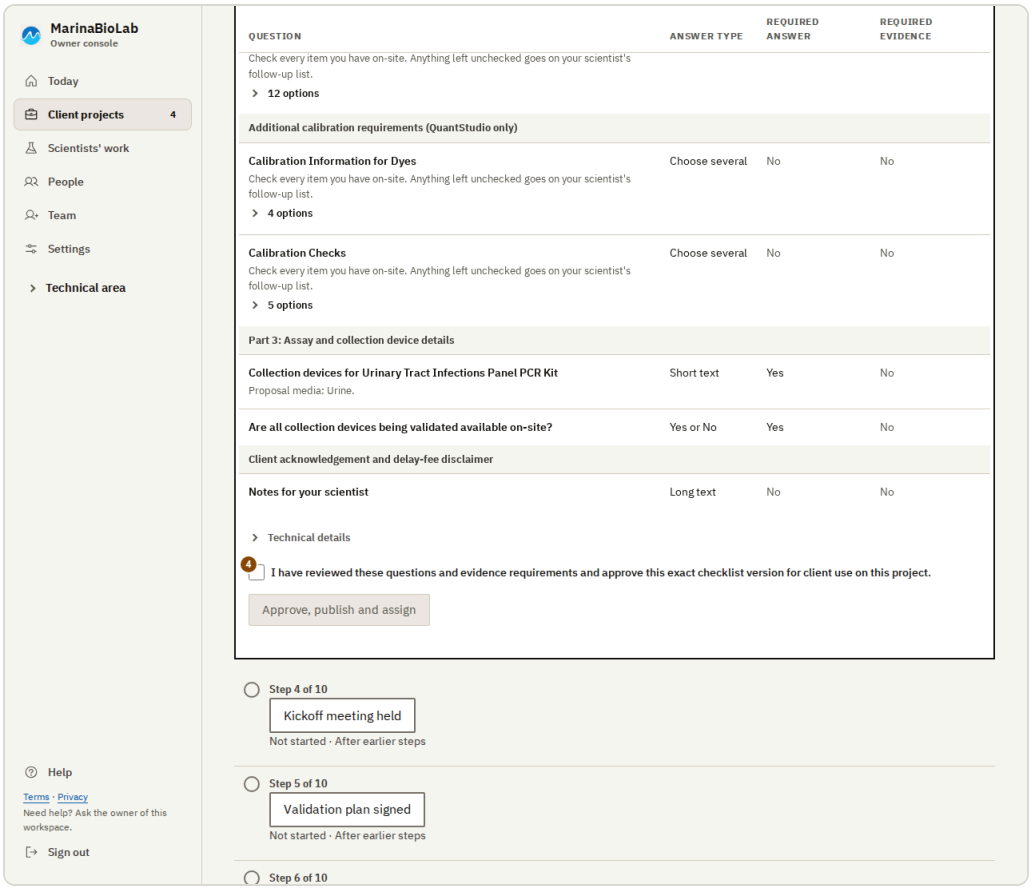


Figure 2.8 The questions open under the table of versions. The approval box (4) and its button sit under the questions of the version you are reviewing.

2. If the draft is not open yet, select **Create Pre-Check from proposal**, or **Review** on the draft's row.

   Where Under **Client checklist setup**.

   You see A row with the chip **Draft** in the table of versions, and the draft's questions under the table.

   If different The system saves this draft by itself when the client signs the proposal, so the button opens that same draft. While a draft waits for your review, Today and Client projects count the step as your turn, not the client's. A project with no proposal gets a general form. To use your own questions instead, select **Import a checklist file** and choose a JSON file (a structured text file) that holds them.

3. Read through the draft's questions.

Where Under the table of versions.

You see Every question with its answer type, and whether an answer and evidence (a file the client uploads) are required. The draft's row now offers **Close**.

If different To review a different version, select **Review** on its row. If you see **This version has no questions. Import a draft containing your approved checklist questions before approval.**, you cannot approve the draft as it is. Load your questions with **Import a checklist file**.

4. Check the approval box, then select **Approve, publish and assign**.

Where Under the questions, next to the sentence **I have reviewed these questions and evidence requirements and approve this exact checklist version for client use on this project.**

You see The message **Checklist approved and assigned to this project.** The step then reads **Waiting on client**, because the client now fills in the checklist in the portal.

If different The box is grayed out while the console reloads the list of versions, and for a version that cannot be approved as it is. If the version is already published, the button reads **Assign approved version**.

Read the answers and record follow-ups

1. Open **Client checklist responses**.

Where Step 3, below **Pre-Check follow-ups**.

You see The counts **Answered**, **Answered No**, **Not checked**, **Open follow-ups** and **Files**, then every answer. After the client signs, a block headed **Client attestation** names the person who signed.

If different If you see **No checklist has been assigned.**, you have not approved one yet. If you see **This draft has not been submitted.**, the client is still filling it in. To see only the answers that need attention, check the box **Only show No, unchecked and unanswered**.

2. Tick each item you want to decide the same way.

Where Step 3, under **Pre-Check follow-ups** (select the heading to open it if it is folded shut), in the table of items the client answered No or left unchecked. Nothing is ticked when the list opens.

You see One form for the ticked items, with **Resolved** and **Waived**, one **Note**, and the list **What will change**: each item, its state now and what it becomes. Each item gets its own record, with the same decision and note.

If different If you see a notice that starts **Read only: this account can view the follow-ups but cannot record decisions.**, you are not on the project's staff. Assign yourself in **Team and activation**, then select **Refresh**.

3 Choose **Resolved** or **Waived** (for Waived, type why in **Note**), then select the button that records them, for example Record 3 decisions to Resolved.

Where	Under the form.
You see	Each item's chip changes to the choice you made. Each item is its own decision on record.
If different	If the server refused an item, it stays ticked with the reason. If an answer was lost, the item is listed under **Could not be confirmed** and stays ticked: check it before you try again. To decide one item on its own, select **Record a decision** on its row, choose **Resolved**, **Waived** or **Open** and select **Save**. Choosing **Open** keeps the item on the follow-up list.

If the client must correct some answers, open **Return to client** under the submission in **Pre-Check follow-ups**. Type what the client should change in **What should the client change?** and check the confirmation box. Then select **Return to client**. The client then edits the Pre-Check and signs it again. Under **Kickoff meeting** in **Pre-Check follow-ups**, **Prepare meeting and draft client message** adds the open items to the meeting's preparation list and drafts a message to the client. The message is sent only when you select **Send to client**.

Checkpoint: step 3 reads **Waiting on client** until the client signs, and every item the client answered No has a decision. If all of this matched, you are done with this section. Take a break before the next one.

2.10

The kickoff meeting, the validation plan and site visits

> You are here: the console, on an active project with the Pre-Check under way. At the end the kickoff meeting is held, the validation plan is issued and any site visits are booked and recorded. About 25 minutes.

Steps 4, 5 and 6 happen in order. First you hold the kickoff meeting, the first meeting with the client. Then the client signs the validation plan (the document that lists what will be validated). Any site visits to the client's lab come last (the portal calls them on-site visits). Meetings and visits you save show up in the client's portal.

Book the kickoff meeting and record it as held

1 Select step 4, **Kickoff meeting held**.

Where The project page, in the steps, or under **Choose a step or project details**.

You see The page **Project schedule**, open on the tab **Scientist meetings**.

If different If you see a notice that starts **Read only:**, this account may not change the schedule. Only the people assigned to the project as **Validation scientist** or **Operations administrator** can change meetings. Check who is assigned in **Team and activation**.

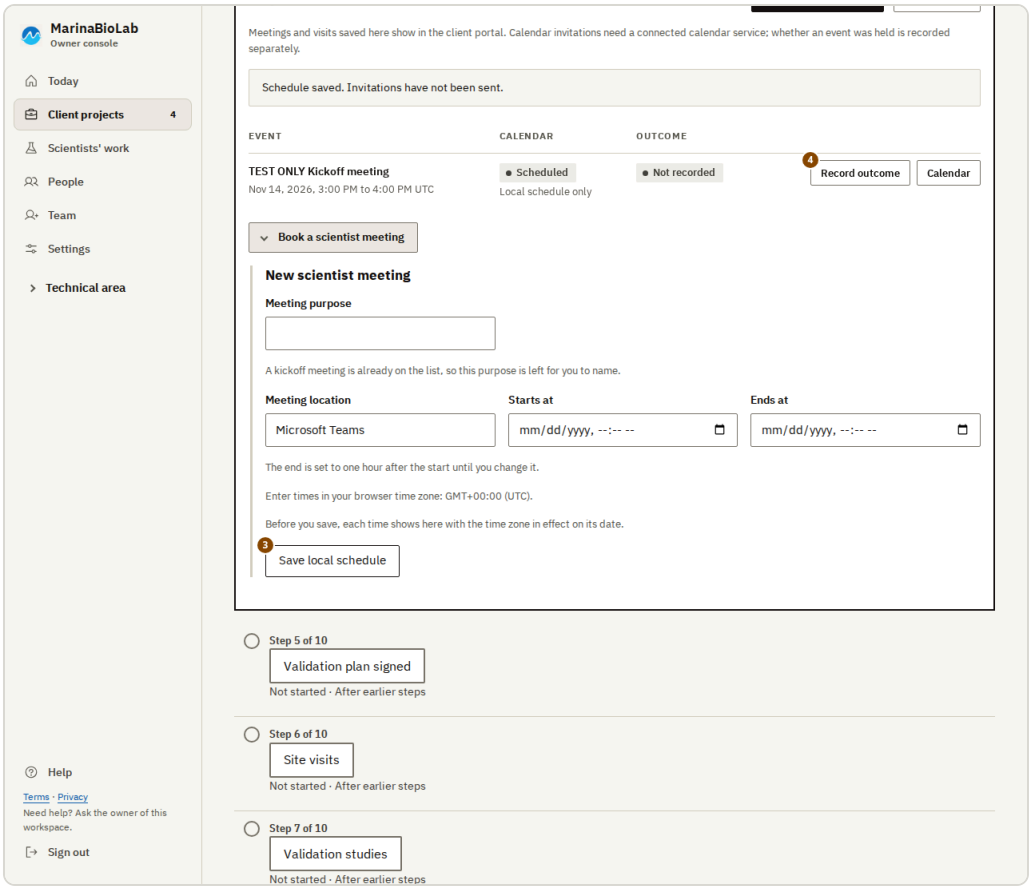


Figure 2.9 Saving the meeting (3) does not send an invitation. Use **Calendar** on its row to send one, and **Record outcome** (4) after the meeting has taken place.

2 Open **Book a scientist meeting**, then fill in **Meeting purpose**, **Meeting location**, **Starts at** and **Ends at**.

Where Below the table of events.

You see The purpose starts as Kickoff meeting. Keep those words in it, because the console finds the kickoff meeting by them. The location starts as Microsoft Teams. The end starts one hour after the start until you change it. Times are in your browser's time zone, and the form names it. The purpose becomes the meeting's title in the list the client sees.

If different If no meeting is booked yet, the form is already open. Once one is booked, select **Book a scientist meeting** to open the form again.

3. Select **Save local schedule**.

   Where The bottom of the booking form.
   You see The message **Schedule saved. Invitations have not been sent.** The meeting now shows in the table and in the client's portal.
   If different If you see **The end must be after the start.**, the 2 times are the wrong way round. Swap them and save again.

4. After the meeting has taken place, select **Record outcome** on its row.

   Where The table of events.
   You see The outcome form under the meeting's row.
   If different You cannot choose **Held** before the meeting's end time has passed.

5. In **Outcome**, choose **Held**. Describe the meeting in **Outcome notes**, then select **Save outcome**.

   Where The outcome form.
   You see The message **Outcome recorded.** Step 4 shows **Done**, and you can now issue the validation plan.
   If different If you see a message that starts **Outcome recorded. This step stays open until the calendar issue is resolved:**, it tells you what to fix under **Calendar**. To change an outcome you already recorded, select **Correct outcome** on its row.

Saving a meeting or a visit does not send an invitation to anyone. To send one, select **Calendar** on the event's row, then choose the action **Create calendar event** and an approved calendar. Type a reason in **Reason for this action**, check the box beside the review statement, and select the button **Create calendar event**. This works only when a calendar service is connected.

Write and issue the validation plan

1. Select step 5, **Validation plan signed**.

   Where The project page, in the steps, or under **Choose a step or project details**.
   You see The plan form with the chip **No plan yet**, and a block headed **Signed proposal** that lists the signed assays.
   If different If you see **A supported signed Validation Proposal is needed before issuing coverage.**, the client has not signed the proposal yet.

2. Type a few sentences in **Summary**. For each section of the plan, type its **Heading** and **Text**.

   Where The plan form.
   You see Your text in the form.
   If different To add a section, select **Add section**. A section with no text is left out of the document.

3. Select **Add explicit combination**.

   Where Under the heading **Signed coverage combinations**. A coverage combination is one study on one instrument, medium, storage and timepoint that the client agreed to.
   You see A new row, with its study, instrument, medium, storage and timepoint still to set.
   If different If the client agreed to more than one combination, finish this row in step 4 before you add another.

4. Set the row's study. Then set each of instrument, medium, storage and timepoint to **Exact value** (and type the value) or **Not required**, and select **Done**.

   Where The new row.
   You see The finished row in the list.
   If different If a field is still on **Incomplete**, you cannot issue the plan. Repeat steps 3 and 4 for each further combination.

5. Select **Save draft**.

   Where The bottom of the plan form.
   You see The message **Draft saved. Preview it, then issue it to the client.**
   If different **Save draft** is grayed out while a problem remains. The problem is written beside the buttons, for example **Write a short summary of the plan.** After a save, the list **Before issuing** names every row that is still incomplete. Once a version of the plan exists, the button reads **Save as new draft**.

6. Select **Issue to client**, then **Confirm**.

   Where Beside the save button. Then, in the window that asks **Issue this plan to the client? They can then read and sign it in the portal.**
   You see The message **Issued. The client can now read and sign the plan in the portal.**
   If different If you see **Issue opens once the kickoff meeting is recorded as held. You can keep saving the draft.**, step 4 is still open. Record the kickoff meeting as held first.

Site visits

1. Select step 6, **Site visits**.

   Where The project page, in the steps, or under **Choose a step or project details**.
   You see The same schedule page, open on the tab **Site visits**, with the field **Reason for completing this step (audited)** at the top.
   If different If the work is remote, do not book anything. Select the button that begins **Use the usual reason** (it writes Remote validation, no site visit needed), or type your own reason, then select **Not needed**. If you see **Site visits can be decided once the validation plan is signed.**, step 5 is still open.

2. Open **Book a site visit**, then fill in **Visit number**, **Starts at**, **Ends at** and the site's address.

   Where Below the table of events.
   You see The visit's details in the form. A new visit starts at the address of the latest visit on the list.
   If different If you see a notice that starts **Read only:**, this account may not change visits. Only the people assigned to the project as **Site visit coordinator** or **Operations administrator** can change them.

3. Select **Save local schedule**.

   Where The bottom of the booking form.
   You see The message **Schedule saved. Invitations have not been sent.**, and the visit in the table.
   If different If you see **The end must be after the start.**, the 2 times are the wrong way round. Swap them and save again.

4. After each visit has taken place, select **Record outcome** on its row.

   Where The table of events.
   You see The outcome form under the visit's row.
   If different You cannot choose **Completed** or **Follow-up needed** before the visit's end time has passed.

5. In **Outcome**, choose **Completed**. Describe the visit in **Outcome notes**, then select **Save outcome**.

   Where The outcome form.
   You see The message **Outcome recorded.** The visit's outcome reads **Held**, because the console shows a completed visit as held. Step 6 closes when no other visit is still open and the client has acknowledged the visit's dates in the portal.
   If different If there is still work to do on site, choose **Follow-up needed** instead of **Completed**. To change an outcome you already recorded, select **Correct outcome** on its row.

Checkpoint: step 4 shows **Done**, the plan reads **Issued. The client can now read and sign the plan in the portal.**, and each visit has an outcome. If all of this matched, you are done with this section. Take a break before the next one.

2.11

From validation studies to the published report

> You are here: the console, on an active project where the scientist has approved the report in the workbench. At the end the report is published to the client. About 10 minutes.

The scientific work happens in the workbench, the scientists' site. There the scientist binds (links) the validation to this project, runs the studies and approves the client report. Steps 7 and 8 then close by themselves (section 2.4). Step 9 is the final payment (section 2.8). On step 10 you publish the report so the client can get it.

Publish the approved report

1. Select step 10, **Report published**.

Where The project page, in the steps, or under **Choose a step or project details**.
You see The section **Client report**, then **Signed delivery progress** and **Deliverables** below it.
If different You cannot publish a report while the project is not active yet, on hold, archived or canceled. In that case a notice names the project's state and what to do first.

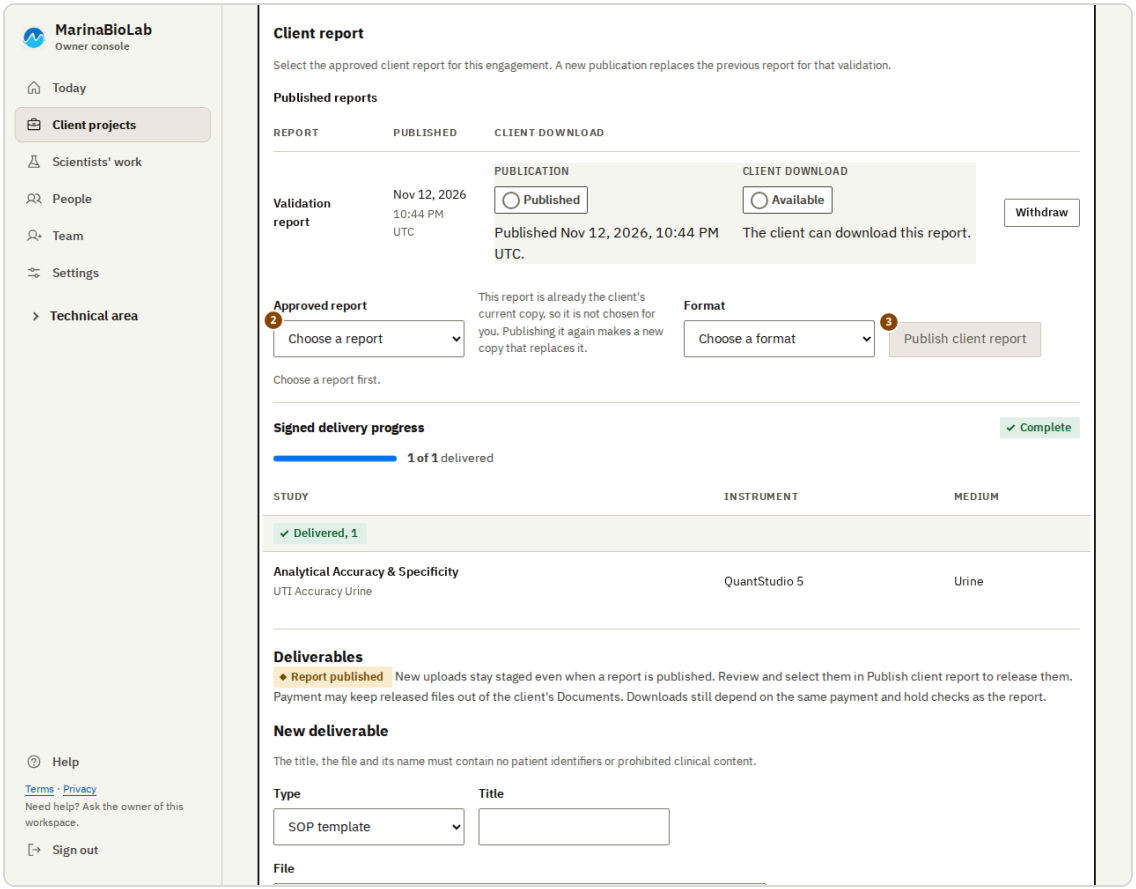


Figure 2.10 Approved report lists only reports that the scientist approved and bound to this project.

2. In **Approved report**, choose the report. Then choose the file type in **Format**.

Where Under **Client report**.
You see The report, named by its validation and the date it was approved, with a note on what it covers in the signed plan. When exactly one report is bound to this project and it is not published yet, it is chosen for you. **Format** offers **Word document** and **PDF**, and starts on the format you last published in on this browser.
If different If you see a message that starts **No publishable final client reports are available.**, the scientist must first prepare, sign and bind the report in the workbench. When they have, select **Refresh**.

3 Select **Publish client report**. A window opens that names the report and the format. Select **Publish client report** again in that window.

Where To the right of **Format**, then in the window that opens.
You see A confirmation that starts **Report published.** This report replaces any report published earlier for the same validation.
If different If you see **Choose a report first.**, no report is chosen yet. **Do not publish yet** closes the window without publishing. A red message means the report was not published, or the console could not confirm that it was. If it says the server did not confirm the change, select **Refresh** and check before you publish again. If the server is set to ask for a second factor, the console says Publishing this report needs a code from your authenticator app: type the 6-digit code in **Authentication code** and select **Confirm and publish**.

You can publish the report before the final payment comes in. The client can download it once the payments it waits on are settled and no financial hold applies. That payment is the final payment, or the initial payment when the client pays everything upfront. The confirmation tells you which case applies: **It opens to the client unless a payment or a financial hold still blocks it.** or **It opens to the client once the final payment settles, unless a financial hold or another payment still holds it.** A copy the client has already downloaded stays with them, even after you replace the report. On the step, the published report shows two facts apart: **Publication**, and **Client download** with the reason when it is held.

Under **Deliverables**, you can add extra files for the client, such as an SOP template (a standard operating procedure) or training material. **Files stay staged until a publisher selects and approves them for release with the report. Released files use the report's final payment gate.** You select the staged files to release in the window of **Publish client report**.

Checkpoint: you see a confirmation that starts **Report published.** If all of this matched, you are done with this section.

2.12

Client messages

> You are here: the console, signed in, with a client message waiting. At the end you have answered it. About 5 minutes.

Clients write to the lab from the portal. Unread client messages show up on **Today**, on **Client projects** and on each project's **Messages** page. Today also lists unanswered messages by age, under **What is stuck, and for how long**. The client sees your reply the next time they open the portal. No email goes out about it.

1. Select the client's name on an unread message.

   Where The page **Client projects**, in the list **Unread client messages** below the project list. (**View messages**, under the line at the top of the page, jumps straight to it.)

   You see The project's **Messages** page with the **Conversation**. Each message is marked as from the client, from you or from MarinaBioLab.

   If different If you see **No unread client messages**, there is nothing to answer. The list covers only the projects you are assigned to. You can also open **Messages** under **Choose a step or project details** on any project.

2. Type your answer in **Reply to the client**.

   Where Under the conversation.

   You see Your text in the field. Above the box, a suggested reply built from the project's step may show, with **Use this starter**. It fills only an empty box. Edit it before you send.

   If different A reply can be up to 4,000 characters long. If you see **Read only: this account can read the messages but cannot reply to the client.** in place of the field, your account may not reply on this project.

3. Select **Send reply**.

   Where The button below your reply.

   You see The message **Reply sent. The client's messages are marked read.**

   If different If you see **The reply could not be confirmed. Refresh the thread before retrying.**, select **Refresh conversation** and check whether your reply is there before you send it again.

Below the conversation, **What the client sees** lists what the portal shows the client for this project: the lead contact, the summary, the latest update, the meeting and visit details and the invoice due dates. To change them, open **Edit what the client sees** and edit the fields, then select **Save client details**. The portal shows the fields exactly as you typed them. The one exception is the summary, which shows only until a proposal or contract is issued for signature. An empty field is not shown at all.

Answer a scientist's help request

Scientists can ask for help from a card in the workbench. Each request appears on Today as an item labelled Help request under **What is stuck, and for how long**, with the scientist, the validation, the step and the card. No mail is sent either way.

1. Read the request.

   Where **Today**, under **What is stuck, and for how long**, an item labelled Help request.

   You see The scientist's question and when they asked.

   If different If no request is open, no Help request item is listed.

2. Type your answer in **Your answer**, then select **Send answer**. **Use a starter** writes a first line from where they asked, for you to finish.

Where	Under the request.
You see	The item reads Answered, with a line that begins **Answer recorded**. The scientist reads the answer on the card where they asked.
If different	If the answer was not recorded, the line says so and keeps your text.

Checkpoint: you see **Reply sent. The client's messages are marked read.** If all of this matched, you are done with this section.

2.13

Complete a step by hand

> You are here: the console, on a project where something happened outside the system, such as a proposal signed on paper. At the end that step is marked complete, with your reason on record. About 5 minutes.

Most steps complete by themselves from what the client does in the portal or what the scientist does in the workbench. Complete a step by hand only when the event happened somewhere the system could not see, such as a proposal signed on paper. The console records each step you complete by hand, with your reason. Do not complete step 1 by hand on a project whose initial payment has not been taken yet, because the console then has no way to open step 2.

Step	Button	What the screen warns
1 **Proposal signed**	**Complete (records no signature)**	**This records no signature. The initial payment step does not open by itself, and a signature made after this does not open it either.**
2 **Initial payment received**	**Complete (records no payment)**	**This records no payment. The initial payment stays owed and the client is no longer offered Pay, so record it under Payment terms when it arrives. If it is the project's whole payment, the report stays locked until then.**
6 **Site visits**	**Complete** or **Not needed**	No warning. You see the buttons only after the validation plan is signed.
7 **Validation studies**	**Complete (opens final payment)**	No warning under the button. The step's page says to complete it by hand only to send the final bill before the reports are approved, and that a validation must be bound to the project.
8 **Report release** and 10 **Report published**	**Complete**	No warning. If something the step needs is missing, the console refuses and says why.
3, 4, 5 and 9	None	These complete only from the client's signature, a meeting recorded as held, or the record of the final payment (paid, waived or not required).

1. Select **All steps and overrides**.

   Where The project page: open **Choose a step or project details**, then **All steps and overrides**.
   You see A table of every step, with its state and the steps that must be done before it.
   If different Steps 6, 7 and 8 also have the same control at the top of their own pages, with the field **Reason for completing this step (audited)**.

2. Type the reason in **Reason for completing a step (audited)**. Say what happened and where the proof is filed.

   Where Above the table.
   You see The buttons in the table can now be selected.
   If different The buttons stay grayed out while the field is empty. The field holds up to 500 characters on one line.

3. Read any warning under the step's button first, then select the button.

   Where The step's row, at the right end.
   You see A line that names the step and says it was completed, with **The next steps open when their prerequisites are met.**
   If different If a sentence sits where the button should be, it says why the step cannot be completed now, for example **The project is not active. Activate it under Team and activation first.**

Checkpoint: a line names the step and says it was completed. If all of this matched, you are done with this section. Take a break before the next one.

2.14

Lab build projects

> You are here: the console, on a new project of the type lab build. At the end the contract is signed by both sides and you know where to take its payments and publish its handover documents. About 25 minutes.

A lab build is the second type of project. It runs under a contract (the statement of work). The contract has a payment schedule, workstreams (the parts of the work the contract lists) and a handover packet of documents. A lab build has 5 steps. It has no proposal, Pre-Check, validation plan, **Project schedule** or report page.

Step	What you do	What the client does in the portal
1 **Contract signed**	Build and issue the contract. Once the client has signed, countersign it (sign it for the lab). It counts as signed only after MarinaBioLab countersigns.	Signs the statement of work.
2 **Upfront payment received**	Link the invoice from QuickBooks (the lab's accounting system), or record the payment. The upfront payment starts the work.	Pays the upfront invoice.

Step	What you do	What the client does in the portal
3 **Workstreams achieved**	Keep the workstreams up to date in the list **Progress items**. When ClickUp is connected, they come from ClickUp.	Follows the workstreams.
4 **Milestone payments received**	Mark each milestone's condition as met and record the payments.	Pays the milestone invoices.
5 **Welcome and handover packets published**	Upload the welcome and handover documents. Each one reaches the client's Documents as soon as you upload it.	Reads the handover packet.

Issue and countersign the contract

1. Select step 1, **Contract signed**, then the button for the template you want to use.

   Where The project page, in the steps. Then the buttons under **New Lab Build contract: choose the Statement of Work template**.

   You see The contract form, filled in from the template, under the heading **Statement of Work**, with the chip **No contract yet**.

   If different If a draft already exists, the contract form opens straight away, and you can no longer change the template.

2. Fill in or correct **Client legal name** and **Contract date**, and any other field the template shows, such as **State (governing law)** or **Estimated duration**.

   Where The top of the contract form.

   You see The contract details in the form.

   If different The fields depend on the template. You can leave **Client address (optional)** empty.

3. Type the **Project total (USD)**. Then check or type each payment's **Amount (USD)** and **Due condition**.

   Where Under **Payment schedule**, in the contract form.

   You see **Payment 1 (gates work)** is the upfront payment that has to come in before work starts. **Check** reads **Balanced** when the payments add up to the project total.

   If different If the template splits the project total, it fills in the payment amounts for you, and you can edit any of them. To add a milestone payment, select **Add payment**.

4. Select **Save draft**.

   Where The bottom of the contract form.

   You see The message **Draft saved. Review the preview, then issue it to the client.** The chip begins **Draft, not issued**.

   If different If something is missing, a list above the buttons names it, for example a schedule that does not read **Balanced**.

5. Select **Issue to client**, then **Issue Statement of Work** in the window that opens.

   Where The bottom of the form.

   You see The message **Issued. The client can now read and sign the contract in the portal.**

   If different The button is grayed out until the draft is saved.

6 When the chip begins **Client signed · awaiting countersignature**, type **Your full name** and **Your title**, then check the boxes beside the 2 statements under them.

Where Step 1, under **Countersign for MarinaBioLab**.
You see A line that names the account you are signing as.
If different The form is grayed out until the project is active. It also stays grayed out for anyone who is not on the lab's countersigner list, with the message **Only the people on the countersigner list can countersign. Ask one of them to sign in and countersign.**

7 Select **Countersign**.

Where The button below the 2 statements.
You see The message **Countersigned. The contract is signed; the payment schedule is live and the upfront payment is due.** The chip begins **Signed and countersigned**.
If different To change a signed contract, open **Edit the contract as a new version**. Both sides sign the new version, and rows already paid stay paid. If the server is set to ask for a second factor, the console says Countersigning needs a code from your authenticator app: type the 6-digit code in **Authentication code** and select **Confirm and countersign**.

On steps 2 and 4, the payments table appears once the contract is countersigned. A contract with one payment takes the whole project total.

Where	Task	What to do
Steps 2 and 4	Link a QuickBooks invoice	On the payment's row, select **Add invoice** and open **Link a verified QuickBooks invoice**. Choose the company, type the **Invoice ID** and **Customer ID** from QuickBooks, and select **Verify and link invoice**. From then on, QuickBooks reports the payment when the invoice is paid.
Steps 2 and 4	Record a payment that arrived	On a row with no linked invoice, select **Record paid**. Type the amount received (a button fills in the amount still owed), then choose **Method**, which starts empty, and fill in **Payment or bank reference**. **Received on** starts on today. Select **Record payment**.
Step 4	Make a milestone payment due	On the milestone's row, select **Mark condition met**, type which condition was met, select **Mark as met**, then confirm. When every workstream the milestone rests on reads Achieved, the reason starts from the workstreams' dates (UTC days, as Today names them). You still check it and confirm it.
Step 5	Publish a handover document	Open **Upload a document**, choose the type, type the title and choose the file. Then select **Upload and publish**, and **Publish document** in the window that opens. A handover document does not wait on any payment, and you cannot withdraw it from the console.
All steps and overrides	Complete a step by hand, or close the project	To complete one step, choose it in **Step**, type a reason in **Reason (audited)**, select **Complete step** and confirm. When every workstream is achieved and every payment row is paid, select **Mark project complete** and confirm to close the project. **Request override** only records a request. It changes nothing, and no one can approve it yet.

On steps 2 and 4, under the payments table, **QuickBooks company** lists each company as **Not connected**, **Connected** or **Needs attention**. To connect one, open **Connect a company** (it reads **Connect another company** once one is listed) and type the company's number from QuickBooks in

QuickBooks company ID. Then select **Connect QuickBooks**. QuickBooks then asks you to approve the connection on its own page.

Checkpoint: the chip begins **Signed and countersigned**, and the payments table shows on steps 2 and 4. If all of this matched, you are done with this section. Take a break before the next one.

2.15

Your lab team

> You are here: the console, signed in as the owner of the lab's workspace or as an admin. At the end you can invite a scientist or an admin, change their role and turn their access off or back on. About 10 minutes.

The **Team** page lists the scientists and admins who work in the workbench. Being an **Admin** on this page is a role in the lab's workspace. It does not let a person into the console. Only the owner list does that (section 2.1).

Invite a scientist or an admin

BEFORE YOU INVITE SOMEONE NEW

An address with no sign-in account gets one when you create the invitation. If the server cannot make that account, no invitation is created and the reason shows on the page. If the reason says the server cannot create accounts, ask the person who runs the lab's server.

1 Select **Team**.

Where The menu on the left.
You see **Invite someone**, **Waiting invitations** and **Members**.
If different If you see **Choose a lab workspace to manage its team.**, choose a workspace in **Lab workspace** first.

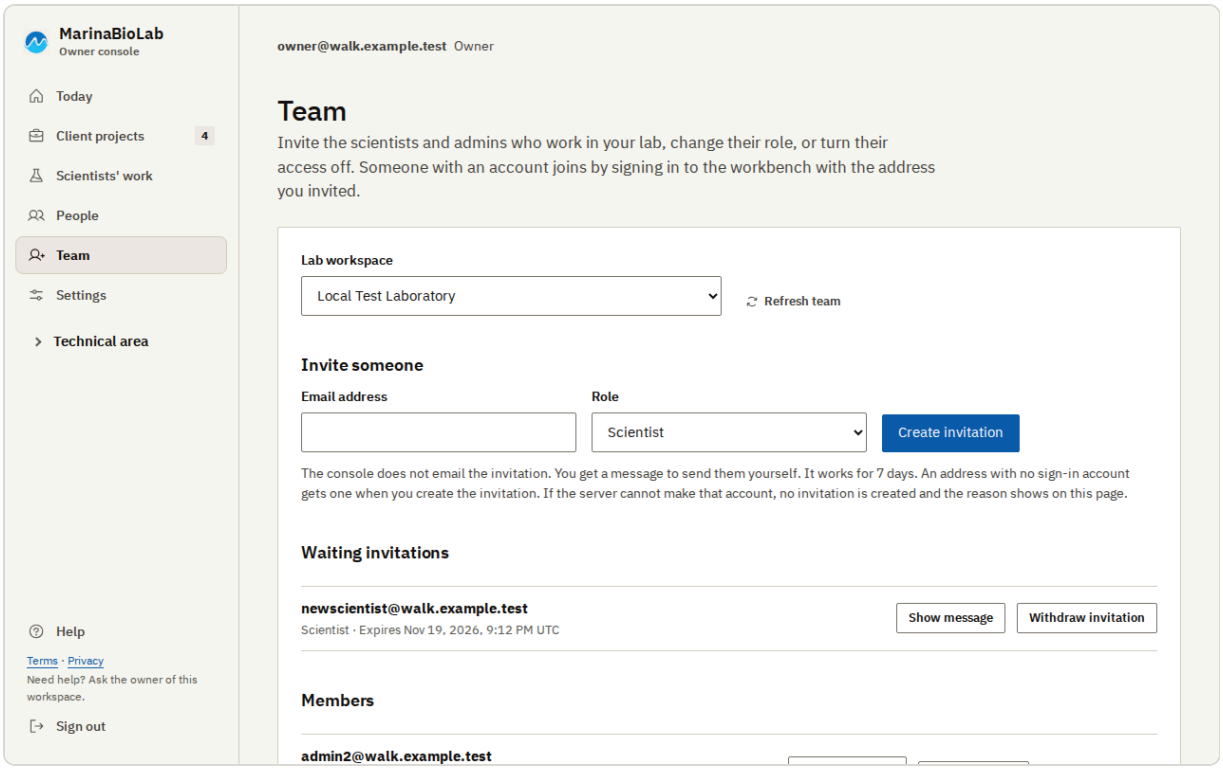


Figure 2.11 Your own row reads **Owner**, with no role list and no **Turn off access**. Every other member has **Turn off access**, and a role list unless they are the lab's only admin.

2 Type the person's work email address in **Email address**, then choose **Scientist** or **Admin** in **Role**.

Where Under **Invite someone**.
You see The email address and the role you chose. The role starts on **Scientist**.
If different You can give only these 2 roles here.

3 Select **Create invitation**.

Where To the right of **Role**.
You see A heading that begins **Message for**, and a ready-made message with the workbench's web address and the date the invitation expires.
If different If a red message appears, it says why the invitation was not created, for example **Enter a valid email address.** Correct what it names and select **Create invitation** again.

4 Select **Copy message**, then send the message to the person yourself, by email or chat. The console does not send it for you.

Where Under the message.
You see The message **Message copied. Paste it into an email or chat to the person you invited.**
If different To see the message again later, select **Show message** under **Waiting invitations**.

The invitation works for 7 days. The person joins your team the first time they sign in to the workbench with the invited email address.

Change a role or turn access off

1. On the person's row, choose the new role in **Role**. Then, in the window that opens, select the button that names the new role.

   Where The page **Team**, under **Members**.
   You see A line saying the person now has the new role.
   If different Your own row and the lab's only admin have no role list. To close the window without changing anything, select **Keep as is**.

2. To stop someone's access, select **Turn off access** on their row, then **Turn off access** again in the window that opens.

   Where The page **Team**, under **Members**.
   You see The person moves to the list **Access turned off**.
   If different To cancel an invitation that nobody has used yet, select **Withdraw** under **Waiting invitations** instead.

3. To give someone their access back, select **Turn access on** on their row, then **Turn access on** again in the window that opens.

   Where The page **Team**, under **Access turned off**.
   You see A line saying the person has access again. They are back under **Members** with the role they had before.
   If different You see the list **Access turned off** only when someone's access is off.

Set the name printed on signed reports

Each member's row reads **Printed name for signatures: none yet** or names the printed name. The workbench prints this name on the reports the scientist signs.

1. Select **Set printed name** on the person's row (**Change printed name** if a name is already set). Type the name in **Printed name (as it will print on signed reports)** and why in **Reason (recorded)**, then select **Save printed name**.

   Where The page **Team**, under **Members**.
   You see The message **Printed name saved. Recorded in the audit trail.** The row names the new printed name.
   If different If a red line shows under the fields, it names what is wrong. Correct it and save again.

A new role takes effect the next time the person signs in or their session renews. Turning access off takes the workbench away from them straight away, and their work stays. It does not affect the console: an email address on the owner list can still sign in there (section 2.1).

The **People** page only shows information, and you cannot change anything on it. **Your team** and **Clients** switch between the lab's staff and the client accounts. Each row shows the person's role, their last activity in the workbench (a client who uses only the portal has none) and their counts of

validation runs and co-pilot use. Where a row offers **View activity**, select it to see what that person did in a period you choose. Clients get their accounts from project invitations (section 2.5).

Checkpoint: the person you invited is under **Waiting invitations**, or under **Members** once they have signed in. If all of this matched, you are done with this section.

2.16

Decision cards and Settings

> You are here: the console's **Today** page. At the end you have answered a decision card and know how to change the calculator defaults. About 10 minutes.

You answer decision cards on **Today** when the lab must put an answer on record. Under **Settings**, you change the calculator defaults that new proposals start from.

Answer a decision card

A decision card is a question with a fixed set of answers, such as an approval, that the lab must answer on record. The system sets each card's wording and who may answer it. Cards for you are listed under **Needs you**. Cards for other people are under **Waiting on someone else**.

1. Read the card from top to bottom.

   Where The page **Today**, under **Decisions**, in the group **Needs you**.
   You see The question, then **Who must act**, **If no one answers** and **What an answer does**.
   If different If you see **Choose the lab workspace whose decisions to read.**, choose a workspace first. If you may not answer a card, it shows the reason and no form.

2. Under **Your answer**, choose an answer. Then fill in any fields that answer needs.

   Where On the card.
   You see Under each answer, a line that says what it leads to. Then any further fields, and a box for comments.
   If different Some answers need comments or an evidence link. If one is missing when you go on, a message under the form tells you which.

3. Select **Review and record**.

   Where The bottom of the card.
   You see A window that lists what will be recorded and says **This is recorded with your name and the time, and cannot be edited later. To change it, revoke it; the revocation is recorded too.**
   If different If you see **Choose an answer.**, no answer is chosen yet. Go back and choose one.

4. Type your name in **Type your full name to sign**, then select **Record answer**.
   - **Where** The window that opened in the last step.
   - **You see** A confirmation on the card with the date, your name and what the answer does. The card moves to the group **Answered**.
   - **If different** If a red message appears in the window, it says why the answer was not recorded, for example **Type your full name; it is recorded with your answer.** Correct what it names and select **Record answer** again.

To take back an answer you recorded, open **History** on the card and select **Revoke**. Type a reason in **Why it is revoked** and your name in **Type your full name to sign**, then select **Revoke answer**.

Change the calculator defaults

Settings holds one thing: the numbers behind the proposal calculators. Each save adds a new version. New proposals use the newest version, and a proposal that is already saved keeps the version it was built with.

1. Select **Settings**.
   - **Where** The menu on the left.
   - **You see** The page **Validation calculator settings**, with the current version, who saved it and why.
   - **If different** If you see **Choose the lab workspace whose settings to view.**, choose a workspace first.

2. Change the numbers you need to change.
   - **Where** The groups **Kit reactions (PCR Reaction Calculator)**, **Zepto organism bags** and **Timeline (Validation Timeline Projector)**.
   - **You see** Each change is listed under **Save a new version**, with the old value and the new one.
   - **If different** To drop your edits, select **Discard changes**.

3. Type what changed and why in **Reason (3 to 500 characters)**. Then select the button that reads **Save as version** followed by the next number.
   - **Where** Under **Save a new version**.
   - **You see** A line that begins **Saved as version**.
   - **If different** The button stays grayed out while nothing has changed or the reason is under 3 characters. If someone else saved in the meantime, your save is refused. Select **Reload current settings**: their version loads, and your edits stay on screen. Check your edits against their version and save again.

Checkpoint: the card you answered is in the group **Answered**, and a settings change shows a line that begins **Saved as version**. If all of this matched, you are done with Part 2. Take a break.

2.17

Common mistakes and how to recover

Mistake or situation	What you see	How to recover
You signed in with an email address that is not on the owner list.	The sign-in page with **This account does not have access to the owner console. Sign in with an owner email.**	Sign in with an email address that is on the owner list, or ask the person who runs the lab's server to add yours.
The invitation email never reached the client.	The invitation card reads **Waiting for email**, or the line on the row under **Open invitations** begins **The invitation email was not accepted.**	Wait 15 minutes, then invite the same email address again with the same roles. The card then gives you a link you can copy and send yourself.
You invited the wrong email address.	The email address is listed under **Open invitations**.	Select **Revoke**, type a reason and select **Revoke invitation**. The link stops working straight away. Then invite the right address.
You changed the proposal and cannot issue it.	**Issue to client** is grayed out, and **Save your changes first.** is written beside it.	Select **Save as new draft** (**Save draft** on a first draft, **Save change order** on a change order), check the preview, then select **Issue to client**.
The client signed, and the price or scope must change.	The proposal form is folded away and shows **Start change order**.	Start a change order, save it and issue it (section 2.6). The client signs the new version. Payments the lab already received stay credited.
You uploaded a statement of work file and expected the client to sign it.	**Statement of work uploaded as a draft. It cannot be sent for signature: for that, build and issue the proposal above.**	Build and issue the proposal. The console keeps an uploaded file on record but never sends it for signature.
You tried to activate a project that is not ready.	**Set up and activate in one step** reads **Not available yet**, or the press stops with the server's reason. In the step-by-step form: **Activation opens once the items under Before activation are done.**	Do what the line names: a required role, a published notification template, or your own role on the project. Then press again.
You assigned the wrong person to a role.	The role reads **Assigned** with that person.	Open **Hand over or end a role** and hand the role to the right person, with a reason.
A project waits on something outside the portal.	Its step reads **Your turn** or **With client**, but nothing can move.	Pause it under **Team and activation**. Resume it when the work can go on.
Issue to client stays grayed out on a priced proposal.	A reason beside the button names a missing price or the service total.	Follow the link in the reason, type the price (0 for an included item), save and issue.

Mistake or situation	What you see	How to recover
You recorded a payment and the console got no answer when it saved.	**The server did not confirm this change. Send it again unchanged, which records it at most once, or select Refresh to see whether it was saved.**	Select **Send it again unchanged**. Do not type the payment in again as a new one.
You asked for a waiver and cannot approve it.	**Waiting for a second owner to approve it. The owner who asked cannot approve it.**	Ask another owner to sign in, select **Review waiver** and approve it.
You published the report and the client cannot download it.	The confirmation says the report opens once the final payment settles, or a financial hold is active.	Collect or record the final payment (or have a second owner approve a waiver), and resolve any active hold. The download then opens by itself.
You completed step 1 or step 2 by hand.	After step 1, step 2 did not open. After step 2, the initial payment still shows as owed.	After step 1, the console cannot open step 2. Write to the support email address under **Help**, or, if **Help** shows **Get help**, ask the owner of the lab's workspace. After step 2, record the payment under **Payment terms** when it arrives.
You started to leave a form with unsaved changes.	A window asks **You have unsaved changes on this screen. Leave without saving?**, or the same question with the name of a part of the page in place of "this screen".	Select **Stay**, then save. **Leave** throws your changes away.

PART 3

MarinaBioLab Client Portal

The portal is the website where your lab follows its project with MarinaBioLab. Here you sign documents, pay invoices, fill in a checklist before a validation and download your report. Each project page shows what is done, what is waiting for you and what we at MarinaBioLab are working on.

Who uses it	The people at your lab whom we have invited to a project, for example a lab director, a billing contact or a quality manager.
Address	`portal.mblvalidation.com`
You need	An invitation email from us, access to the email inbox we sent it to, and an up-to-date version of Chrome, Edge, Firefox or Safari.
Signing in	A link or a code sent to your email. There is no password.

WHAT THIS PART IS FOR

This part is for the people at a client's lab who use the portal, and for staff who test the portal the way a client uses it. It follows the order of a project: accept your invitation, sign, pay, fill in the checklist, book your meetings and download your report. Each section is one task. When you finish, you can follow a project with us from your first visit to your final report.

3.1

Accept your invitation (your first visit)

> You are here: your email inbox, with the invitation email from us. At the end you have joined the project and can see it in the portal. About 10 minutes.

We send your project invitation by email. It works for 7 days, and only for the email address we sent it to. You sign in with that address, then join the project.

1. Open the email from MarinaBioLab and select the invitation link in it.

   Where Your email inbox. The link is under **Accept your invitation here:** in the email with the subject **Your MarinaBioLab project portal is ready**.

   You see The portal's sign-in page, headed **Sign in**.

   If different If the page **Accept your project invitation** opens instead, you are already signed in on this browser. Go to step 5.

2 Type the email address we sent the invitation to in **Email address**, then select **Email me a sign-in link**.

Where The page **Sign in**.
You see The heading **Check your email**, your email address, and the line **Open the link or enter the code from your email.**
If different If something goes wrong, a red message explains why. If you see **Enter the email address your invitation was sent to.**, the address you typed is incomplete. If you see **Wait a minute before asking for another link.**, you asked for a link twice in a short time, so wait a minute and try again.

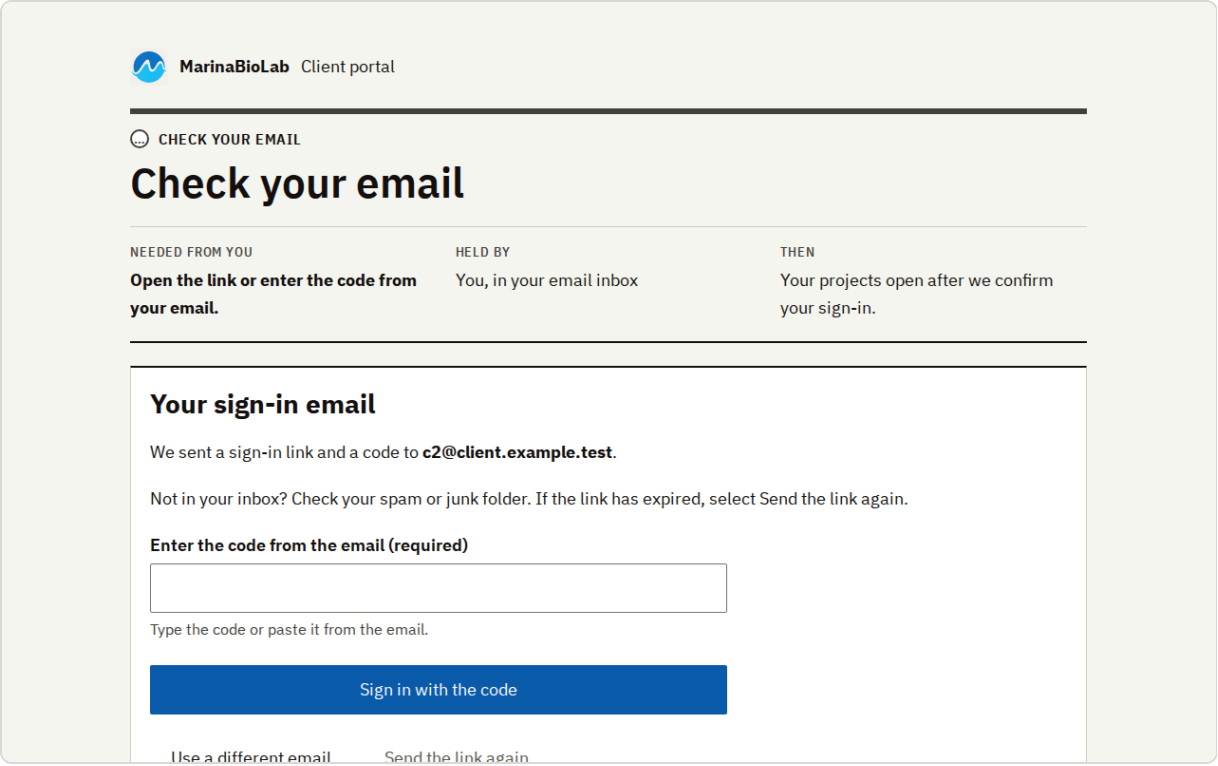


Figure 3.1 The code signs you in without the link. Use it, for example, when you read the email on a different device.

3 Open the new email from us and select the sign-in link in it.

Where Your email inbox. If you cannot find the email, look in the spam or junk folder.
You see A page headed **Finish signing in**.
If different If you are reading the email on a different device, go back to the **Check your email** page instead. Type the code from the email in **Enter the code from the email**, then select **Sign in with the code**. Go to step 5.

4 Select **Continue to sign in**.

Where The page **Finish signing in**.
You see The page **Accept your project invitation**.
If different If the sign-in page shows a red message that starts with **We could not complete sign-in with that link.**, the link is too old or was already used. Repeat step 2 and use the newest email. If a page opens with a heading other than **Accept your project invitation**, find that heading in the table below.

5 Check the box that starts **I accept this invitation**, then select **Accept invitation**.

Where The page **Accept your project invitation**.
You see The heading **Invitation accepted** and the line **Your project access is ready.**
If different If you did not check the box, the page shows **Check the box to confirm you want to join the project, then accept.** If a red box appears above the button, the portal could not confirm that you accepted. Select **Sign in again and check your projects** inside that red box.

6 Select **Open project**.

Where The page **Invitation accepted**.
You see Your project, on its **Overview** tab.
If different If the button reads **Sign in again**, you have already accepted the invitation. Select **Sign in again** and sign in once more to open your project.

The invitation page says	What it means	What to do
You already joined this project	You are already a member of this project, so there is nothing left to accept.	Select **Open your projects**. If the project is not in the list, select **Sign in again and check your projects**.
Invitation expired	The invitation ran out before you accepted it.	Select **Ask for a new invitation**. It opens an email to us. If the page shows only **Your projects** and no email link, ask your contact at MarinaBioLab for a new invitation.
Invitation unavailable	You cannot accept the invitation while you are signed in this way. The page lists the usual reasons. The most common is signing in with a different email address from the one we invited.	Select **Sign in with a different email** beside **Signed in with the wrong email?**, then sign in with the email address we invited. That brings you back to the invitation. If the email address is not the problem, ask us for a new invitation.
We could not check this invitation	The portal could not read the invitation at that moment.	Wait a few minutes, then select **Try again**.

Checkpoint: your project is open on its **Overview** tab. If all of this matched, you are done with this section.

3.2

Sign in on later visits

> You are here: a web browser, on a later visit. At the end you are signed in and looking at your project. About 5 minutes.

The portal does not use passwords. Each time you need to sign in, you ask for an email with a sign-in link and a code, and you use either one.

1. Open `portal.mblvalidation.com` in your web browser.

   Where A browser on your computer or phone.
   You see The page **Sign in**, with a card headed **No password needed** that says **We email you a secure link.**
   If different If **Your projects** opens, you are still signed in from last time. Go to step 3.

2. Sign in with your email address, the same way as in steps 2 to 4 of section 3.1.

   Where The page **Sign in**, then your email inbox, then the page **Finish signing in**.
   You see **Your projects**, or the portal page you asked for before you signed in. If you have only one open project, it opens by itself, on its **Overview** tab. **Projects** in the top bar then takes you to your list.
   If different If you see **No project is open. Closed projects are under Show canceled and archived projects.**, check the box **Show canceled and archived projects**. If it then reads **No projects are available.**, this email address has no project. Sign out, then sign in with the email address we sent your invitation to.

3. Select **Open project**.

   Where Your project's card on the page **Your projects**.
   You see The project page, on its **Overview** tab.
   If different When a step is waiting for you, the card also shows a blue button, such as **Review and pay**. Select it to go straight to that step instead of **Overview**.

If you need another email sent to the same address, select **Send the link again** on the page **Check your email**. After each email, that button is grayed out for 60 seconds, and the line under it reads **You can ask for another link in a minute.** To go back to **Sign in** and use a different address, select **Use a different email**. If you type a code that is mistyped or too old, you see **That code did not work. Check it and try again, or request a new email.**

> Checkpoint: the project page is open on its **Overview** tab, or on the step that waits for you. If all of this matched, you are done with this section.

3.3

Find your way around

> You are here: the portal, signed in, on **Your projects**. At the end you know what the top bar, the tabs and the status words mean. About 10 minutes.

After you sign in, every page has the same bar across the top. Under it you see either the list of your projects, or one project with its tabs. A project is one piece of work we do with your lab, and it is either a validation or a lab build. In a validation, we validate a panel (the set of targets a kit detects) for your lab. In a lab build, we build a laboratory with you and hand it over.

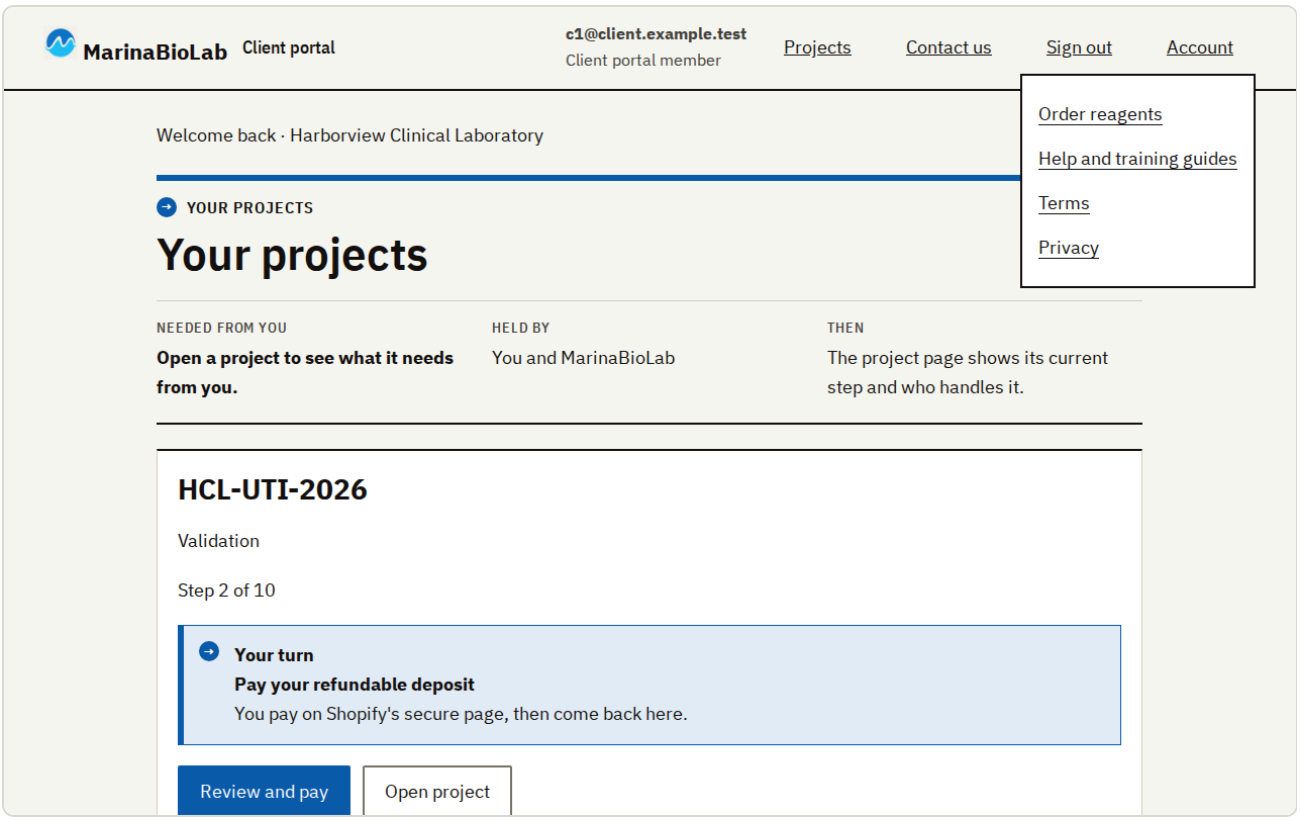


Figure 3.2 Your projects lists each open project with its step. The blue button on a card opens the step that is waiting for you. Sign out sits in the top bar. The example project is a Urinary Tract Infection (UTI) panel validation.

In the top bar	What it does
The MarinaBioLab logo and **Client portal**	Opens **Your projects**.
Projects	Opens **Your projects**, the list of your projects.
Contact us	Opens a message to us (see 3.11).
Sign out	Signs you out and takes you back to the sign-in page (see 3.13).

In the top bar	What it does
The round button with your initials	Opens the account menu. **Order reagents** opens the MarinaBioLab reagent store, `order.marinabiolab.com`. **Help and training guides**, **Terms** and **Privacy** open the written training guides, the terms and the privacy notice. All 4 open in a new browser tab.

Your projects shows one card for each open project we invited you to. Projects that need something from you come first. Each card shows the project type (**Validation** or **Lab build**), the project name and reference, the current step, a status tag and the next step. If you have more than 5 projects, type a name or reference in **Find a project** to shorten the list.

A project page starts with **All projects** (the link back to your list of projects) and the project name. Under the name, one line gives the project type, the reference, the current step and the date of our latest update. A validation project has 7 tabs: **Overview**, **Checklist**, **Payments**, **Schedule**, **Progress**, **Documents** and **Messages**. Every page opens with a box that says what is true, what is needed from you, who holds the step (**Held by**) and what comes next. A lab build project has no **Checklist** or **Schedule** tab. You see **Payments** only if your role includes payments (see 3.12). A small dot after a tab's name means your next step is on that tab. On every tab except **Overview**, a band under the tabs repeats the next step's tag and title. When that step is yours, the band shows **Your next step:** with the step's title, and the button for that step, unless you are already on its tab.

Tags and status words

Tags and status words are short labels that show where each step, payment, meeting or file stands. The words listed for Steps can appear on a project card, in the box at the top of a page, in the band under the tabs and on the **Progress** tab.

Word	Where	What it means
Your turn	Steps	This step is waiting for you.
With MarinaBioLab	Steps	Nothing is needed from you right now. Either it is our turn, the step belongs to a colleague of yours with another role, or the project is on hold.
Review project	Your projects	A signature or checklist step is open, and the card has no blue button. Open the project to see whether the step is yours to do.
Booked	Steps	A meeting or an on-site visit has a date. The box at the top and the Schedule tab may show one of the Schedule words further down instead.
In progress	Steps	We are working on this step or workstream.
Complete	Steps	The step, or the whole project, is finished.
Not started	Progress	This step has not begun. On a validation project the tab adds **Later steps open as earlier ones finish.**
Needs attention	Progress	Something is holding this step up. If a reason is on record, it shows in the line under the step.

Word	Where	What it means
Update pending	Progress	The portal has no current status for this step yet.
Not applicable, **Not required**	Steps, Payments	Not needed for your project.
Closed	Steps	We closed the project. It shows on **Your projects** only when you check the box **Show canceled and archived projects**. You can still read it and download its documents.
Not yet available	Schedule, Documents	On the Schedule tab, a meeting or visit whose step has not opened yet. On the Documents tab, the files you cannot download yet (see 3.10).
Due	Payments	You can pay this now. The row has the button to pay.
Not yet due	Payments	A later payment. We tell you how to pay it when it is due.
Being prepared	Payments	This payment is due, and we are still setting up the way for you to pay it.
Confirming payment	Payments	You came back from Shopify (our online store), and the portal is waiting for Shopify to report your payment.
Partly paid, **Paid**	Payments	We have recorded part of the amount, or all of it. For **Partly paid**, a note gives the amount you still owe.
Waived	Payments, Progress	We waived the payment or the step. You owe nothing for it.
Refunded, **Partly refunded**	Payments	We returned the payment, or part of it, to you.
Under review, **To be confirmed**	Payments	We are reviewing this payment with you, or confirming it.
Calendar confirmed	Schedule	The date is set and confirmed on the calendar.
Date saved, **Calendar pending**	Schedule	The date is saved in your project. We have not confirmed the calendar invitation yet, or we are still arranging it.
Calendar needs attention, **Dates need review**	Schedule	We are looking into the calendar invitation, or a change to its details, and we will contact you.
Held	Schedule	The meeting or visit took place.
Past	Schedule	The date has passed, and we have not yet recorded how the meeting or visit went.
Canceled, **Missed**	Schedule	The meeting or visit did not take place.

Checkpoint: you can open a project, find its tabs and read the status tag on each step. If all of this matched, you are done with this section. Take a break before the next one.

3.4

Read your project

> You are here: the portal, on your project's **Overview** tab. At the end you can read the box at the top and the list of steps. About 5 minutes.

Your project opens on the **Overview** tab. The box at the top tells you what the project needs from you now, who holds the step and what comes next. The list below it shows every step.

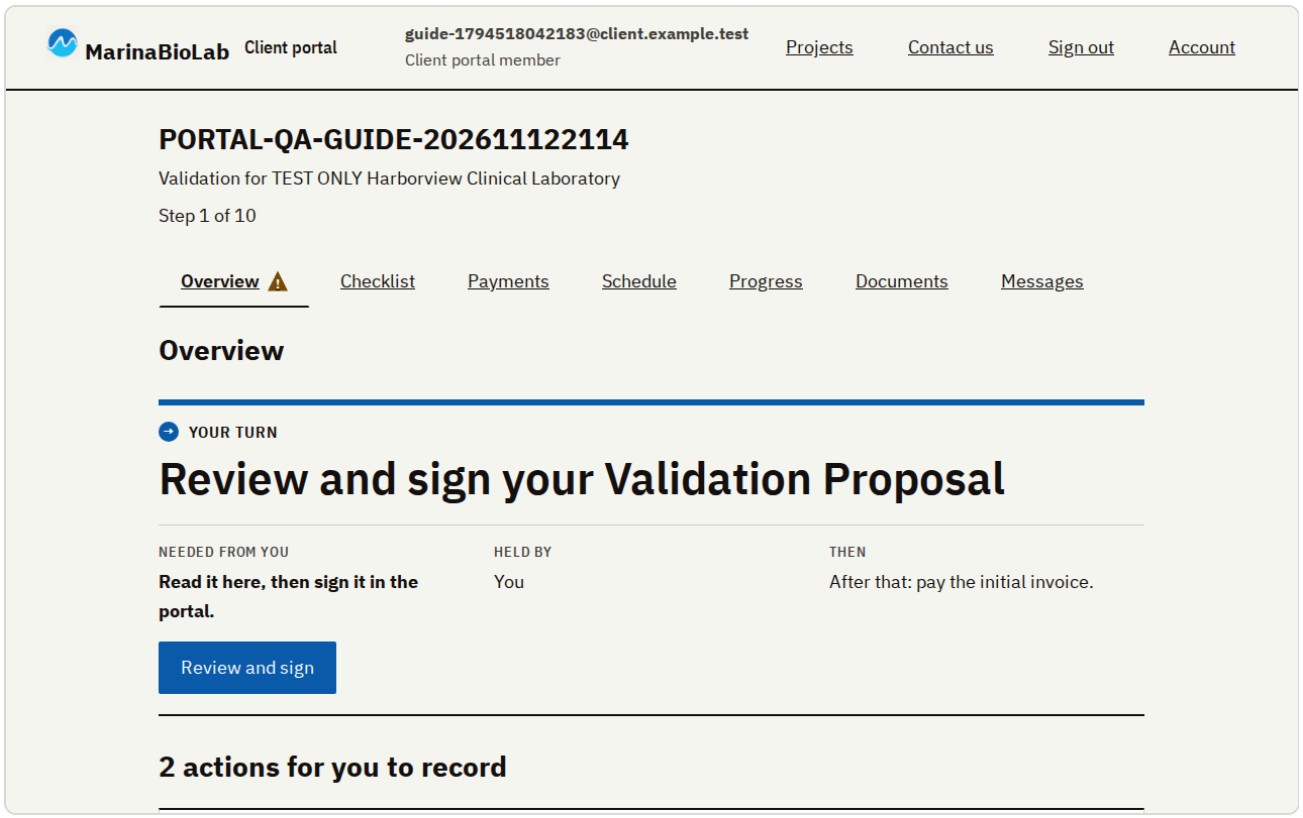


Figure 3.3 Read the box at the top first. Its tag and Held by tell you whose turn it is.

Part of the Overview	What it tells you
The box at the top	Shows a tag, what is true now, what is needed from you, **Held by** and what comes next. When the step is yours, it has the one button to press, such as **Review and sign** or **Review and pay**. When it reads **Nothing is needed from you right now**, we hold the step.
Ask for an update	Shows under the box while we hold the step. It opens the message window about that step, with its first line written. Nothing is sent until you select **Send message**.
Progress	While we run the studies, this card lists the first rows of the **Progress** tab, with the link **See all project steps**.
One action for you to record	Shows under the box, and only when we ask you to record an answer. If the card offers several answers, choose one. Type your name under **Type your full name to sign**, then select the card's button. A green line confirms what you recorded.

Part of the Overview	What it tells you
Your project, step by step	Lists every step under chapter headings, with an icon for each step's state: a check mark for complete, a hand for your turn, an hourglass for our turn, a calendar for booked and a lock when a step is not open yet. A step your project does not need is crossed out. Under a locked step, the last sentence starts with **Opens after** and names what the step is waiting for.
Questions?	Shows your MarinaBioLab contact, or **Your MarinaBioLab team** if we have not named one, with a phone number when we have one on record. The button opens a message to us (see 3.11).
Documents and **Payments**	Your documents, each with whether it is published and whether you can download it, and how much of the total is paid. **All documents** opens the **Documents** tab, and **Invoices and receipts** opens the **Payments** tab. You see the payments only if your role includes payments.

The steps of a validation project

Chapter	Step	What you do
Getting started	**Sign the Validation Proposal**	Read and sign the proposal, the document that sets the scope and price and starts the project (see 3.5).
Getting started	**Pay the initial invoice**	Pay on Shopify, our online payment page (see 3.6). Once we issue the invoice, this step changes to **Pay your** followed by the invoice name.
Getting started	**Complete the validation checklist**	Answer the checklist questions and sign it (see 3.7).
Planning	**Meet your scientist**	Your scientist books the meeting. You join it from the **Schedule** tab (see 3.8).
Planning	**Sign the validation plan**	Read and sign the plan, which lists the validation studies we will run (see 3.5).
Planning	**On-site visit**	We arrange the visit to your lab with you. Your lab's primary contact (see 3.12) confirms the dates (see 3.8).
Validation	**Validation studies**	Nothing. We run the studies and post updates (see 3.9).
Validation	**Report release**	Nothing. We prepare your approved report for release.
Wrap-up	**Pay the final invoice**	Pay on Shopify (see 3.6). You must pay this invoice before you can download your report. Like the initial invoice, this step changes to use the invoice name.
Wrap-up	**Download your report and files**	Download them from the **Documents** tab (see 3.10).

The steps of a lab build project

A lab build project has 5 steps. First you sign the contract, and we then countersign it, which means we sign it for MarinaBioLab (**Sign the contract**, see 3.5). Then you pay the first invoice in QuickBooks, our accounting system (**Pay the initial invoice**, see 3.6). Next we work through each workstream (one part of the build) and update the **Progress** tab. That step reads **Build in progress** during the build, and **Build workstreams** before and after it. As we deliver the work, you pay each later invoice in QuickBooks (**Pay the milestone invoices**). When we hand over your lab, you download your packets from the **Documents** tab (**Download your welcome and handover packets**).

Checkpoint: you can say whose turn it is from the tag on the top card. If all of this matched, you are done with this section.

3.5

Sign a document

> You are here: the portal, on a project where a document is waiting for your signature. At the end the document is signed and you have a copy. About 10 minutes.

In the portal you sign the proposal, the validation plan and, on a lab build, the contract. You read the document on the page, then sign it by typing your name and job title. Only a signer or the primary contact can sign (see 3.12).

1 Select **Review and sign**.

Where The box at the top of the **Overview** tab, or the band under the tabs.

You see The document in a reading frame, with its title and version above it, and the heading **Sign electronically** beside it.

If different If you see **Nothing to sign yet**, we are still preparing the document. If you see a card that starts with **Your signer signs this**, you can read the document, but your role cannot sign it.

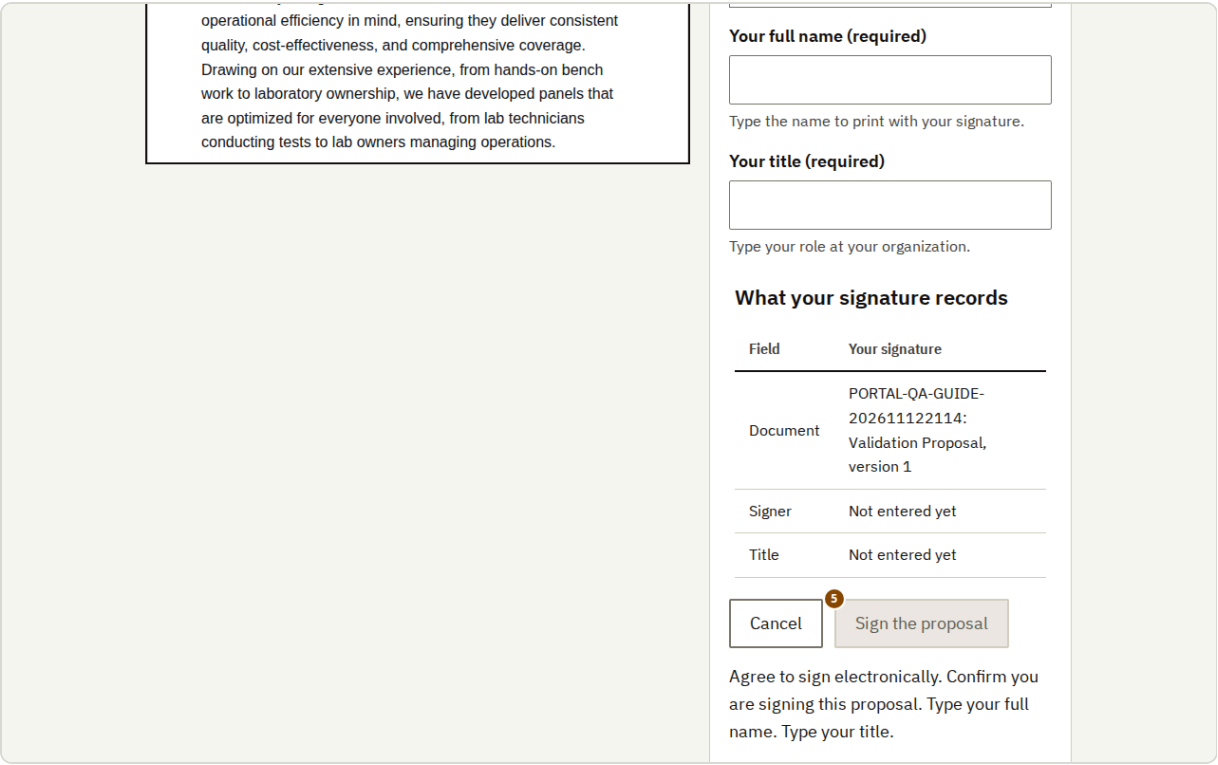


Figure 3.4 Before you select the button at 5, the table above the buttons shows what your signature will record.

2 Read the document all the way to the end.

Where The reading frame in the middle of the page.

You see The exact document we issued. **Full screen**, above the frame, makes it fill the whole window. **Exit full screen** or the Esc key takes you back to the page.

If different If you see a notice that starts **Your link named a different version of this document.**, the link you used is out of date. Read the version shown on the page.

3 Check the 2 boxes under **Sign electronically**.

Where Beside the document, or below it on a narrow screen such as a phone.

You see A check mark in each box. One box says you agree to sign electronically. The other confirms that you are signing this document.

If different If you reload the page or open another project, the boxes are cleared. Check both again.

4. Type your name in **Your full name**, then your job title in **Your title**.

   Where Under the 2 boxes.

   You see The 3 rows of the **What your signature records** table: the document and its version, your name beside **Signer**, and your title.

   If different If a row reads **Not entered yet**, that field is empty. Each field takes up to 200 characters.

5. Select **Sign the proposal**, **Sign the plan** or **Sign the contract**.

   Where Under the table **What your signature records**. The button names the document you are signing.

   You see The page says **Your signature is recorded.** A green card headed **Signed**, with your name, the time you signed and the email address you signed in with. For a contract, the card reads **Awaiting MarinaBioLab countersignature** instead, until we countersign it.

   If different The button stays gray until you have checked both boxes and typed your name and title. The line under it tells you what is missing, for example **Agree to sign electronically.**

6. Select **Download signed PDF** to keep a copy.

   Where The green card.

   You see The button reads **Preparing…**, then your browser saves the signed copy.

   If different Until we activate your project, the card has no button. It says that we keep your signed copy on record and that downloads open once we activate the project. For a contract, there is no button until we countersign it.

Under the buttons, the page states what signing records: **We record your name, title and email, the date and time, your IP address and browser, and a fingerprint of this exact document.** To go back to **Overview** without signing, select **Cancel**. After you sign a proposal, **Overview** shows the initial payment as your next step. While we prepare that payment, its card says that we will tell you how to pay.

You can find the signed copy on the **Documents** tab under **Signed documents**, with its version number and the word signed. In that list, a lab build contract is called **Statement of Work**. Each row has **Download PDF** and **Download HTML**, and also **Download certificate** when the signed copy has a signature certificate on file.

If your role cannot sign, you do not see a button for this step. For a billing contact, **Overview** and the signing page say that your lab's signer or primary contact signs the document. If we change a proposal you have already signed, the box at the top reads **Review and sign the change order**. For a new version of a signed validation plan, the card reads **Review and sign the updated validation plan**. You sign either one the same way.

Checkpoint: you see a green card headed **Signed**, or **Awaiting MarinaBioLab countersignature** for a contract. If all of this matched, you are done with this section. Take a break before the next one.

3.6

Pay an invoice

> You are here: the portal, on a project with a payment that reads **Due**. At the end the payment is made and the row reads **Paid**. About 10 minutes.

To pay, the portal sends you to another site: Shopify's secure payment page for a validation invoice, and QuickBooks for a lab build invoice. On the page before Shopify opens, the portal says: **MarinaBioLab never sees or stores your card or bank details.** Only the primary contact and the billing contact can see payments (see 3.12).

Pay a validation invoice on Shopify

1. Select the **Payments** tab on your project page.

   Where Your project page, in the row of tabs. A dot marks the tab when a payment is due.
   You see A table with the columns **Item**, **Amount**, **Status** and **Action**. The payment you can pay now reads **Due**.
   If different If you do not see the **Payments** tab, your role does not include payments. In that case **Overview** reads **Your billing contact handles this payment**.

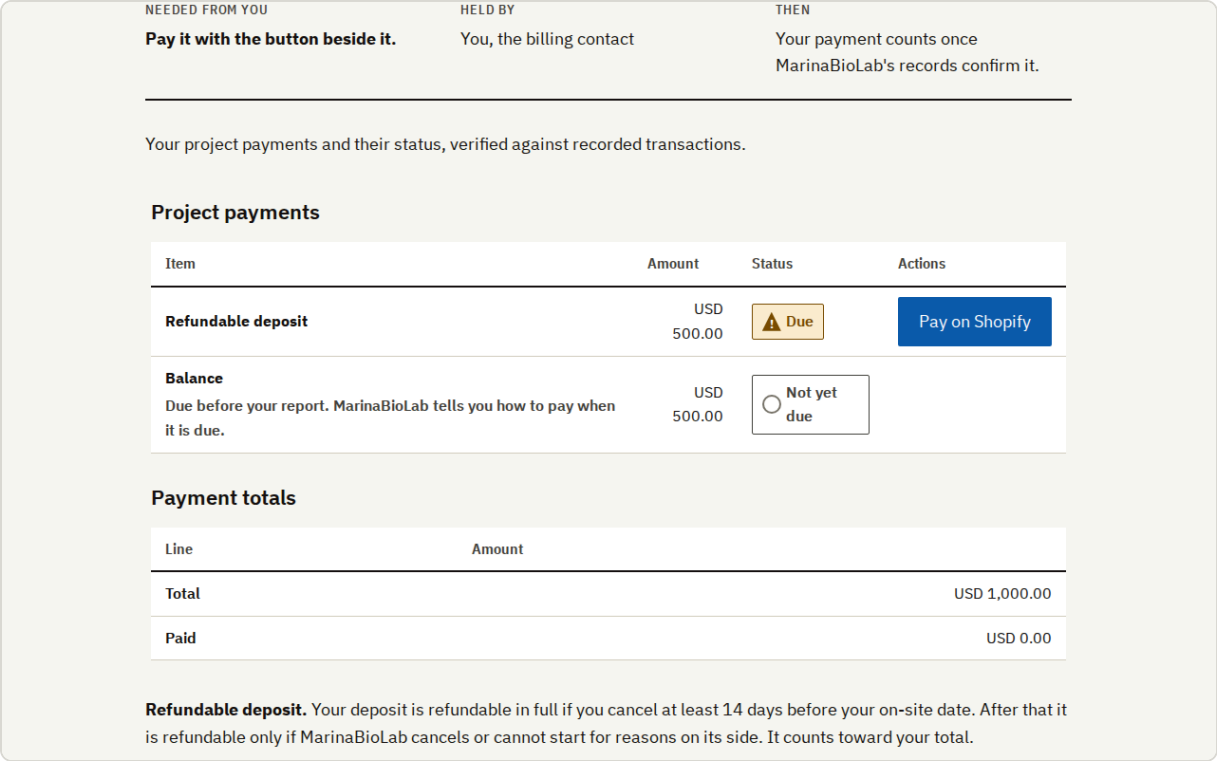


Figure 3.5 Only one payment reads **Due** at a time, and only that row has a button.

2. Select **Pay on Shopify**.
   - **Where** The **Action** column of the row that reads **Due**.
   - **You see** The invoice page. It shows the payment's name under **Invoice**, your lab's name under **Billed to**, the amount beside **Total due**, and the box **How to pay**.
   - **If different** If the row reads **Being prepared**, it has no button yet. Its note says **MarinaBioLab is preparing your payment. We will tell you how to pay.**

3. Select the blue button that starts with **Pay** and shows the amount due.
   - **Where** Next to the invoice, under **How to pay**.
   - **You see** A page headed **You are going to Shopify to pay securely**, with the amount and 3 numbered steps.
   - **If different** If you do not see the blue button, the payment is not open yet. The tag at the top right of the invoice shows its status.

4. Select **Continue to Shopify**.
   - **Where** Under the 3 numbered steps.
   - **You see** **Opening...**, then Shopify's secure payment page. You have now left the portal.
   - **If different** If Shopify's page does not open, use your browser's Back button and check the **Payments** tab before you try again, so you do not pay twice. If a payment cannot start, a red message under the buttons tells you why. If the message reads **This payment changed. Review the amount, then continue.**, check the amount and select the button again.

5. Pay on Shopify's page, the same way you pay in any online store.
   - **Where** Shopify's site, outside the portal.
   - **You see** After you pay, Shopify sends your browser back to a portal page headed **Confirming your payment**.
   - **If different** If you leave Shopify without paying, the payment row on the **Payments** tab reads **Confirming payment** in that browser tab for up to 30 minutes. After that it goes back to **Due**, so you can select **Pay on Shopify** again.

6. Select **Back to your payment**.
   - **Where** The page **Confirming your payment**.
   - **You see** The invoice page, with the status **Confirming payment**. The page updates by itself. Once Shopify reports the payment, the status changes to **Paid**, a message that starts with **Payment received for** names the payment, and your next step opens.
   - **If different** If you come back in a different browser tab, or more than 30 minutes after you started, the link reads **Back to your projects** instead. Select it, open the project and select the **Payments** tab.

Pay a lab build invoice in QuickBooks

For a lab build, the **Payments** tab shows your contract's payment schedule once you have signed the contract (see 3.5) and we have countersigned it. The invoice to pay reads **Due**, and its note ends with **Pay securely in QuickBooks.** QuickBooks opens in a new browser tab. The portal does not show a return page or a confirming status for it.

1. Select **Pay in QuickBooks**.
   - **Where** The **Payments** tab, in the **Action** column of the row that reads **Due**. **Review and pay** in the box at the top also opens that tab.

You see The QuickBooks payment page, in a new browser tab. The portal stays open in its own tab.

If different If a due row has no button, its note reads **Online payment is unavailable for this invoice. Contact MarinaBioLab for payment instructions.** Send us a message to ask how to pay (see 3.11).

2. After you have paid in QuickBooks, go back to the portal's tab and reload the **Payments** tab.

Where The portal's browser tab.

You see The row reads **Paid** once we have recorded your payment.

If different If the row still reads **Due**, we have not recorded your payment yet. Reload the tab later to check again.

For what the status words on the **Payments** tab mean, see 3.3. To pay by check or wire instead, look for the line that starts with **Paying by check or wire? Email**. It gives the email address to write to, and explains that we will record the payment for you. When the portal has our contact email address for your project, that line shows on the invoice page, and on the **Payments** tab while a payment reads **Being prepared**. If you do not see it, send us a message (see 3.11).

Under the table, **Show payment history** lists every payment with the transactions recorded against it. **Download invoice PDF** shows on the invoice page when we have added a link to the invoice. When your initial payment includes a refundable deposit, a paragraph headed **Refundable deposit.** gives the refund terms.

Checkpoint: the payment's row reads **Paid** and your next step has opened. If all of this matched, you are done with this section. Take a break before the next one.

3.7

Complete the validation checklist

> You are here: the portal, on a validation project after your initial payment is confirmed. At the end the checklist is answered, signed and sent to us. About 30 minutes, depending on how many questions we ask.

A validation project includes a checklist: a list of questions you answer before we start the validation studies. Our reminder emails call this list the Pre-Check. The checklist opens once we confirm your initial payment. The primary contact answers the questions and signs the checklist at the end.

Answer the questions

1. Select **Open the checklist**.

   Where The box at the top of the **Overview** tab. The **Checklist** tab opens the same page.
   You see The first section of questions, the list of all sections beside it, and the line **Your answers are saved when you select Save and continue.**
   If different If you see a gray card instead of the questions, such as **Your checklist is being prepared**, the card explains why you cannot answer the checklist right now. The table at the end of 3.7 lists each card and what to do.

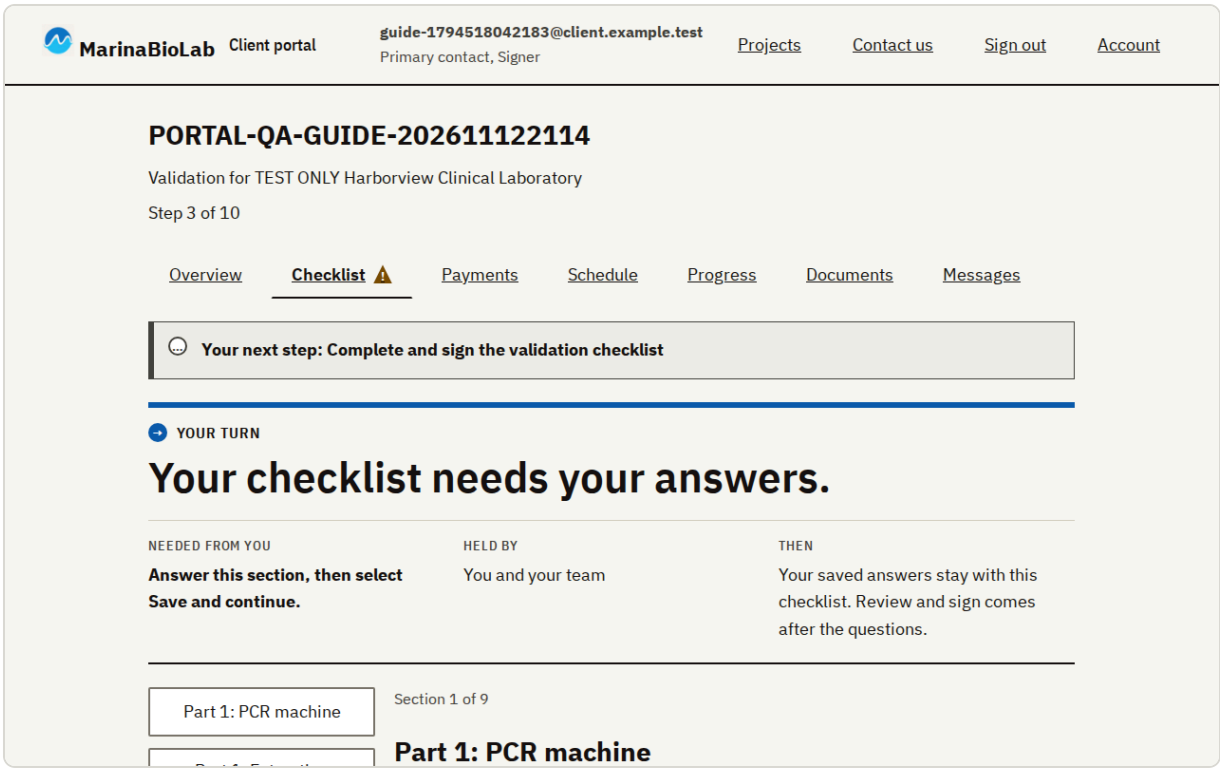


Figure 3.6 We write the sections and the questions for your validation, so yours will look different from this example.

2. Answer each question in the section. Depending on the question, select **Yes** or **No**, choose options, or type text.

   Where The section you are in.
   You see **You have unsaved changes.** under the section title.
   If different If a red line appears under a field, it tells you how to enter the answer, such as **Enter a whole number.** You can leave any question that ends with **(optional)** empty.

3. If a question asks for a file, select **Add a file** and choose the file on your computer.

   Where Under the question that asks for it.
   You see **Checking and attaching your file...**, then the file in the list with its status. The status reads **Ready** once the file has passed its security check.
   If different If your file is empty, too large or the wrong type, you see **Choose a PDF, PNG or JPEG file of at most 3 MB.** Choose a file that meets these limits.

4. Select **Save and continue**.
   - **Where** The bottom of the section.
   - **You see** The next section, and the line **Your answers are saved.**
   - **If different** If a save fails or cannot be confirmed, you see **We could not confirm whether your answers were saved.** or **Your answers were not saved.** Your answers stay on the page. Select **Save and continue** again. Trying again does not save the same answers twice.

5. Repeat steps 2 to 4 for each section until you reach the end.
   - **Where** Each section in turn.
   - **You see** After the last section, the page **Review and sign**, marked **Last step**.
   - **If different** To go back to an earlier section before you reach **Review and sign**, select **Back**, or select the section in the list beside the questions.

> **NO PATIENT INFORMATION**
> The checklist says: **Do not upload anything that shows patient names or other patient information.** Each time you save a section or add a file, you confirm that your answers and files contain no patient identifiers. A note beside each button explains this. There is no separate question about it.

Next to **Add a file**, the page lists the file rules: a PDF, PNG or JPEG file, not empty, up to 3 MB, with a file name of up to 200 characters. Each file reads **Being checked** until its security check finishes. You can submit the checklist only when every attached file reads **Ready**. If a file does not pass, it reads **Blocked by the security check** or **Security check failed**. You cannot remove a file on this page, and adding another file keeps the first one in the list. If you added the wrong file, or one that did not pass, send us a message before you sign the checklist. To attach a file to a question that does not require one, open **Add a supporting file (optional)** to show **Add a file**.

Review, sign and submit

1. Read through your answers on the last page.
   - **Where** The page **Review and sign**.
   - **You see** Your answers in each section, how many questions you have answered, and a count of items for your scientist to go through with you. Those items are answers of **No** and options you left unchecked.
   - **If different** If required answers are missing, a red count says how many. Select the count to go to the first one.

2. If a section needs a correction, select **Change**, correct the answers, then select **Save and return to review**.
   - **Where** **Change** is next to the section's name on **Review and sign**. The save button is at the bottom of the section.
   - **You see** The page **Review and sign** again, with the corrected answers.
   - **If different** If every answer is right, skip this step.

3. Read the disclaimer, then check the box under **Client Acknowledgement & Delay-Fee Disclaimer**.

   Where The signing card at the bottom of **Review and sign**.
   You see A check mark. The statement says that you have read the disclaimer and agree to it, and that your answers and files contain no patient identifiers.
   If different If the card is headed **Sign the checklist** instead, it does not ask for a name, title or consent. Check the box for its statement and skip to step 6.

4. Type your name in **Your full name**, then your job title in **Your title**.

   Where Under the statement.
   You see Your name and your job title in the 2 fields.
   If different If a field is empty, the line under **Sign and submit** says so. Each field holds up to 200 characters.

5. Check the box that starts with **I agree to sign this document electronically.**

   Where Under your title.
   You see A check mark. The box says that your typed name and title are your signature.
   If different Both boxes are cleared whenever your saved answers change, for example after you correct a section. If that happens, check both boxes again.

6. Select **Sign and submit**.

   Where The bottom of **Review and sign**.
   You see The message **Checklist signed and submitted. MarinaBioLab has your answers.** The tab then shows a card that starts with **Checklist signed on**, with the date and time. Next, your scientist books your meeting.
   If different The button stays gray until the card is complete, and the line under it names what is missing, such as **Check the box beside the statement above.** If some answers still need attention, the page shows **Not submitted. Some answers still need attention; each is listed above.** Select the link **Go to the first answer that needs attention** that appears with it, correct the answers, and come back to sign.

When you sign, we record your name and title, the date and time, your IP address and the exact version of your answers. We file the signed checklist on the **Documents** tab as **Validation checklist, signed**. If the portal says your answers were submitted but your signature was not recorded, select the **Checklist** tab, read the submitted answers and sign with steps 3 to 6. Only the signer or the primary contact can do this.

If we need you to change something, we return the checklist to you. The first section then starts with **MarinaBioLab returned this checklist for a change. Update your answers, then review and sign again.** When we give a reason, it shows after **What to change:** on the page. Correct the answers, then sign and submit again.

Card on the Checklist tab	What it means	What to do
Your checklist is being prepared	We have not issued the checklist yet.	Nothing. It shows up on this tab when it is ready.
A card that starts with **The checklist opens after you**	We have not confirmed your initial payment yet.	Pay the invoice (see 3.6), or wait for us to confirm the payment.

Card on the Checklist tab	What it means	What to do
Your team is completing this checklist	Your role cannot edit it. The primary contact fills it in.	Nothing. If it is submitted without a signature, the signer can sign it here.
Checklist submitted	We have your answers. If a signature is still missing, the card notes that your signer or primary contact signs it next.	If a signature is still missing and you are the signer or the primary contact, sign it on this tab with steps 3 to 6 of "Review, sign and submit". Otherwise, nothing. If an answer needs to change, send us a message.
Checklist returned for a change	We asked for a change, and your role cannot edit the checklist.	Nothing. The primary contact updates it.
This project is closed	We closed the project.	Nothing. Its documents stay on the **Documents** tab.

Checkpoint: the **Checklist** tab shows a card that starts with **Checklist signed on**. If all of this matched, you are done with this section. Take a break before the next one.

3.8

Your meeting and your on-site visit

> You are here: the portal, on your project's **Schedule** tab. At the end your meeting is in your calendar, and, if you are the primary contact, the visit dates are confirmed. About 10 minutes.

Your scientist books your meeting. We agree on the on-site visit dates with you outside the portal. The **Schedule** tab shows what has been set.

The tab has 2 cards, **Scientist meeting** and **On-site visit**. Each card reads **Not yet available** until its step opens. The meeting opens after you sign the checklist, and the on-site visit opens after you sign the validation plan. Once a card is open, it says who acts next. After we set a date, the card shows **Date**, **Time** and **Time zone** (**Starts** and **Ends** for a visit over several days), and **Address** for the on-site visit. Under **What to have ready**, it lists anything we ask you to prepare. The tag on each card is a status word (see 3.3).

Add the meeting to your calendar, join it, or ask for another time

1. Select the **Schedule** tab.

Where Your project page, in the row of tabs. **Details** in the box **Your meeting is booked** opens the same tab.

You see The card **Scientist meeting** with the date, the time and the time zone.

If different If the card has no date yet, it has no buttons, and it says who acts next.

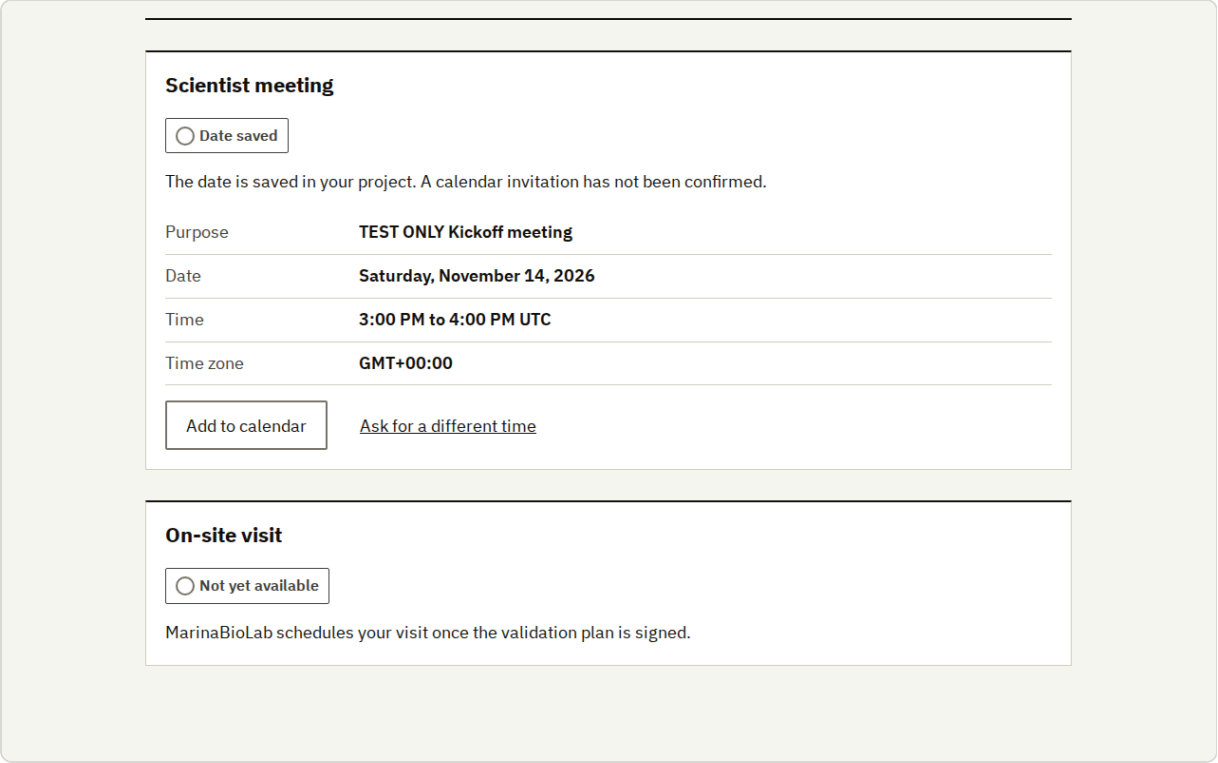


Figure 3.7 A card shows its buttons once we set its date. The on-site visit in this example reads **Not yet available** and has no buttons.

2. Select **Add to calendar**.

Where Under the meeting's details. A booked visit has the same button.

You see Your browser downloads a calendar file, and a message reads **Calendar invitation sent to your browser. Open it from your downloads to add the event to Outlook or your calendar.**

If different You see this button only on a meeting or visit that has a date.

3. At the time of the meeting, select **Join Teams meeting**.

Where The card **Scientist meeting**.

You see The meeting opens in a new browser tab.

If different If you do not see the button, the portal has no confirmed meeting link yet. Send us a message (see 3.11).

4. To ask for a different time, select **Ask for a different time**.

   Where Next to **Add to calendar**. The visit card has a link in the same place that ends with **for a different date**.

   You see The message window opens, with the topic **Changing a date or time** already chosen and a first sentence written for you.

   If different If you opened the window by mistake, select **Cancel**. Nothing is sent.

5. After the first sentence, type the times that suit you. Then select **Send message**.

   Where The message window (see 3.11).

   You see The window closes, and the page confirms that your message was sent.

   If different If you select **Cancel** instead of **Send message**, the window closes and nothing is sent. After you send the message, the meeting keeps its current date until we change it.

Confirm the visit dates (primary contact)

1. Select **Review the dates**.

   Where The box **Confirm your on-site visit dates** at the top of the **Overview** tab, when no other step is waiting for you. The **Schedule** tab has a dot and opens the same card.

   You see On the card **On-site visit**, a form headed **Confirm on-site visit** with the dates, the times, the time zone and the address.

   If different Only the primary contact gets this card and this form. Other people on the project see the dates without the form.

2. Check the box **I confirm these exact dates and times as the project's primary contact.**

   Where Under the dates.

   You see A check mark. The button **Confirm visit dates** turns blue.

   If different If the dates do not work for you, leave the box unchecked. Select the link that ends with **for a different date**, and send us the dates that suit you.

3. Select **Confirm visit dates**.

   Where Under the box you checked.

   You see The message **Your visit dates are confirmed.** The card then shows the row **Dates confirmed** with **By the primary contact**.

   If different If the portal could not check that it recorded your confirmation, it shows **We could not verify your confirmation. Confirm the same dates again.** Select **Confirm visit dates** again.

Checkpoint: the meeting card shows its date and time, and the visit card shows **Dates confirmed** once the primary contact has confirmed them. If all of this matched, you are done with this section.

3.9

Follow progress

The **Progress** tab lists the steps of your project, each with its status (see 3.3). We update it as each part of the work finishes. On a validation project, a line under a step may tell you what the step is waiting for, such as **MarinaBioLab is handling this step.** or **The required payment has not been confirmed yet.** On a lab build, the rows are the parts of the build (workstreams), each marked **Not started**, **In progress** or **Complete**. At the bottom, a list headed **Latest updates from** (followed by your contact's first name, or MarinaBioLab) shows our updates and our replies to your messages, with the newest first.

3.10

Download your documents and your report

> You are here: the portal, on your project page. At the end you have downloaded your report and any other files you need. About 5 minutes.

The **Documents** tab holds every document you have signed, your invoices and receipts, and every file we have published for the project. Each file is the exact version we have on record, listed under the title we gave it. Your validation report shows up there when we release it. When we publish a new copy of a report, the earlier one leaves the list.

1. Select the **Documents** tab.

   Where Your project page, in the row of tabs. **Open documents** in the box **Download your validation report** opens the same tab.

   You see The groups of files for your project. After we release your report, the card **Your validation report** appears above them with the tag **Published**.

   If different If no files are ready yet, the tab reads **Nothing to download yet. Signed documents, receipts and reports appear here as soon as they are ready.** If kit instructions are already on the tab, it reads **No signed documents or receipts yet. They appear here as soon as they are ready.**

2. Select **Download PDF**, **Download Word** or **Download result tables**.

   Where The card **Your validation report**. It has a button for each file we have published.

   You see The button reads **Preparing...**, then your browser saves the file. A message says the file was sent to your browser. The result tables come as an Excel workbook.

   If different If your report is listed under **Not yet available**, it reads **Your report is ready. Payment is required before you can download it.** Select **Open payments** and pay the invoice that is due.

3 Select **Download** beside any other file.

Where The file groups on the **Documents** tab (below the card **Your validation report**, once we release your report).

You see Your browser saves the file, and a message appears that ends with **was sent to your browser. Check your downloads.**

If different Signed documents have **Download PDF** and **Download HTML** instead of **Download**. If a download fails, a red line under the row explains why. If it reads **The download link has expired or could not be opened. Try again.**, select the button again. For any other red line, see the last table in this section.

On the Documents tab	What it holds
Your validation report	Your published report. It shows **Revision** and **Approved** when we include them, with one line for **Report** and one line for **Result tables**.
Signed documents	Your signed proposal, validation plan and checklist. On a lab build, your signed contract, listed as **Statement of Work**.
Invoices and receipts, **Project files**	Your invoice and receipt files, and every other file we have shared with you.
Kit instructions	The Instructions for Use (IFU, the kit maker's manual) that we released for each kit in your validation. Select **Kit details** to see the instruments, materials and storage for the kit.
Not yet available	Files you cannot download yet, each with the reason.
Delivery progress	On a validation project, the items in your signed validation plan, each marked **Delivered** or **Still to come**.

Line under Not yet available	What it means	What to do
Your report is ready. Payment is required before you can download it.	You still have a payment due on the project. If the files waiting are not your report, the line reads **Your documents are ready. Payment is required before you can download them.**	Select **Open payments** and pay the invoice that is due. If you do not see the **Payments** tab, ask your lab's billing contact.
Kept on record. Downloads open once MarinaBioLab activates your project.	We have the file on record, but we have not activated your project yet.	Nothing. The download opens once we activate your project.
Kept on record. This document cannot be released while the project is in its current state. MarinaBioLab is handling it; nothing is needed from you.	Your project is on hold.	Wait for us to contact you about the next step.

Sometimes a file shows a download button, but the portal blocks the download when you select it. A red line under the row then explains why.

Red line under a file after you select Download	What it means	What to do
This document unlocks once the outstanding payment for this project is settled.	An invoice on the project is still unpaid.	Pay the invoice that is due (see 3.6).
This document is not released yet. It unlocks once the outstanding steps for this project are complete.	An earlier step in your project is still open.	Complete any step marked **Your turn** on the **Overview** tab. If none of them is yours, the file opens once we, or your colleague, finish the open step.
This document has not been released yet. MarinaBioLab will publish it when it is ready. or **This file is being checked before release. Check Documents later or contact MarinaBioLab.**	We have not released the file yet, or we are still checking it before release.	Check back later. If you still see this line, send us a message.
This document was withdrawn. or **A newer version of this document has replaced it.**	We withdrew this version, or replaced it with a newer one.	If a newer version is in the list, download that one. If the document was withdrawn and you still need it, send us a message.
This copy is no longer the current one, so it cannot be downloaded. We will publish a fresh copy here. If you do not see it soon, send us a message.	You selected an older report. When we publish a newer report, the older one can stay on the card.	Download the newest report on the card.
This report is on hold while MarinaBioLab reviews the project's payments. Contact MarinaBioLab if you have a question.	Your payments are recorded, and we are reviewing them. The same line can show on the report card.	Nothing to pay. Wait for us, or send us a message if you have a question.

Checkpoint: the files are in your browser's downloads. If all of this matched, you are done with this section.

3.11

Send us a message and read our replies

> You are here: any page of the portal, signed in. At the end you have sent us a message and know where to read our reply. About 5 minutes.

You can write to us from any page by selecting **Contact us**. The portal keeps your message and our reply on your project's **Messages** tab.

1. Select **Contact us**.

   Where The bar across the top of any page.

   You see A window headed **Message MarinaBioLab**, or **Message** followed by your contact's first name. The window also shows the project name.

   If different If you are on **Your projects** and have more than one project, choose the project under **Which project is it about?** first. When we hold the current step, **Overview** also offers **Ask for an update**. It opens the same window on the topic **A question about a step**, with a first line about that step. Change it as you like. If you had typed a message and kept it unsent, the window keeps your words.

2. Choose a topic under **What is it about?**

   Where The message window.

   You see 4 topics: **A question about a step**, **Changing a date or time**, **Invoices or payments** and **Something else**. The first one is chosen until you pick another.

   If different If you opened the window from a card on the **Schedule** tab (see 3.8), **Changing a date or time** is already chosen.

3. Type your message in **Your message**.

   Where Under the warning about patient information.

   You see Your text in the box. **Send message** turns blue.

   If different A counter appears once you pass 3,500 characters. If your message is longer than 4,000 characters, the portal does not send it and shows **Your message is too long. Use no more than 4,000 characters.**

4. Select **Send message**.

   Where The bottom of the window.

   You see The window closes. A message on the page names your project and ends with **The reply will appear in that project's Messages.**

   If different If the portal cannot confirm that your message arrived, it shows **We could not confirm whether your message was sent. Try again to check it.** Select **Send message** again. The portal will not post the same message twice.

5. Select the **Messages** tab to read our reply.

   Where The project page, in the row of tabs.

   You see The messages, with the oldest first. Ours are marked **MarinaBioLab**, yours are marked **You**, and a colleague's are marked **Your team**.

   If different If there are no messages yet, the tab reads **No messages yet.** If there are more than 10 messages, the tab shows the 10 most recent, with a link above them to see the earlier ones.

NO PATIENT INFORMATION

Every message form carries this warning: **Please do not include patient names or other patient information.**

The message window says that your contact **usually replies within one business day.** When we have a phone number on record for your contact, the window shows it for anything urgent. To close the window, select **Cancel**. If you have typed something, the portal first asks **Discard this message?**

and lets you choose **Keep writing** or **Discard message**. You can also write to us from the form under the list on the **Messages** tab.

Checkpoint: your message shows on the project's **Messages** tab. If all of this matched, you are done with Part 3. Take a break.

3.12

Who can do what

When we invite a person to a project, we give them one or more roles. Your role decides which steps are yours. If a step belongs to another role, it reads **With MarinaBioLab** on your pages, even when a colleague at your lab handles it, and you have nothing to do for it.

Task	Primary contact	Signer	Billing contact
Sign the proposal, the validation plan or the contract	Yes	Yes	No. Can read it.
See the Payments tab and the amounts	Yes	No	Yes
Pay an invoice	Yes	No	Yes
Answer the checklist, add files and submit it	Yes	No	No
Sign the checklist	Yes	Yes, when the primary contact submits it without a signature	No
Confirm the on-site visit dates	Yes	No	No

A person can hold several roles, such as signer and billing contact. Every member of a project can send us a message.

The portal has no page for inviting a colleague. To add a person, select **Contact us** and choose the topic **Something else**. Give us the person's name, their work email address and what they need to do: sign documents, pay invoices, or act as the primary contact (who also fills in the checklist and confirms on-site visit dates). We set up their access and send them the invitation.

3.13

Common mistakes and how to recover

Signing out and what the portal keeps

To sign out, select **Sign out** in the top bar. The portal keeps 3 kinds of unfinished work in your browser tab: checklist answers you have not saved, a message you have not sent, and a name and title typed on a signing form. That work comes back if you reload the page, or if your sign-in ends and you sign in again in the same tab. Closing the tab or signing out throws it away. If you have unfinished work, a window asks you to confirm before the portal signs you out, and your browser asks before it closes the tab.

Mistake or situation	What you see	How to recover
You signed in with a different email address from the one we invited.	**Invitation unavailable**, or after you sign in, **No project is open. Closed projects are under Show canceled and archived projects.**	Select **Sign in with a different email** on the invitation page, or sign out. Then sign in with the email address we invited.
You look for an invoice and there is no **Payments** tab.	**Overview** reads **Your billing contact handles this payment**.	Ask your billing contact or primary contact to pay, or ask us to add the billing contact role to your access.
You left Shopify before you paid.	The payment reads **Confirming payment** for up to 30 minutes in that browser tab, then goes back to **Due**. Its note ends with **If you left checkout before paying, you can pay again.**	Open the **Payments** tab, select **Pay on Shopify** on that payment's row, and finish paying.
A colleague saved the checklist while you were answering it.	**This checklist changed since you opened it. Your unsaved answers are kept; review them and save again.**	Read the section again, then select **Save and continue**.
Your sign-in ended, or you reloaded the page, while you had unsaved checklist answers.	In the same tab, a line that starts with **Restored unsaved answers from** and includes the link **Discard**.	If your sign-in ended, first sign in again in the same tab. Check your answers and select **Save and continue**, or select **Discard** to go back to the saved copy. If the line says your kept answers were for an earlier version, a colleague saved the checklist while you were away, so type your changes in again.

Mistake or situation	What you see	How to recover
You select **Sign out** with unfinished work in the tab.	A window asks: **You have unsaved checklist answers, an unsent message or a signature you have not submitted in this tab. Signing out discards them. Sign out anyway?**	Cancel the window. Save the section, send the message or finish signing, then sign out.
Your sign-in ended while the page was open.	**You have signed out** and **The page has been cleared. Anything already saved is safe.** The sign-in page follows.	Sign in again in the same tab. The portal returns you to the page you were on, with any unfinished work kept in that tab.

ACROSS THE SITES

How the three sites hand work to each other

The sites pass work back and forth. Work moves to another site when someone issues or signs a document, pays, books a meeting or publishes a report. The site that receives the work shows it as the next thing to do.

WHAT THIS CHAPTER IS FOR

This chapter is for everyone. It shows how a validation project passes from one site to another, and what each hand-off needs before it can happen. Read it after the part for your own site. When you finish, you know where to look when work seems stuck between the sites.

H.1

The hand-offs at a glance

	Workbench Scientists	Console Owner and admins	Portal Clients
Invitation		❶ **Invite the client** **Client access**, then **Invite client**	❷ **Accept** The link in the email, then **Accept invitation**
Proposal		❶ **Issue the proposal** **Issue to client**. Step **Proposal signed** closes when the client signs.	❷ **Sign** **Review and sign**, then **Sign the proposal**
Payment		❶ **Ask for payment** **Publish payment link**. The payment step closes when the client pays.	❷ **Pay** **Payments**, then **Pay on Shopify**
Checklist	❸ **Follow up** **Pre-Check follow-ups** on the client project page	❶ **Review and publish the checklist** The console drafts it from the signed proposal, then **Approve, publish and assign**. Step **Pre-Check signed** closes when the client signs.	❷ **Answer and sign** **Checklist**, then **Sign and submit**
Meeting	❶ **Book and record** **Save local schedule**, then after the meeting **Record outcome**	❸ **Step closes** **Kickoff meeting held**. The same schedule form is here.	❷ **See the meeting** **Schedule** tab
Validation plan	❶ **Issue the plan** **Issue to client**	❸ **Step closes** **Validation plan signed**	❷ **Sign** **Review and sign**, then **Sign the plan**
Report	❶ **Publish the report** **Generate client copy**, prepare and sign the final copy, then **Publish to client portal** and **Sign and publish**	❷ **Step closes** **Validation studies**. The final payment opens.	❸ **Pay, then download** **Payments**, then **Documents** and **Download PDF**
Messages	❷ **Read** **Client messages** on the client project page	❷ **Read and reply** **Messages**, then **Send reply**	❶ **Write** **Contact us**, then **Send message**
Help	❶ **Ask** **Ask for help with this card**, then **Send to the owner's console**. Step 3: read the answer on the card.	❷ **Answer** **Today**, **What is stuck, and for how long**, then **Send answer**	

Figure H.1 The 9 hand-offs of a validation project, in the order they usually happen. Read each row in the order of its numbers. Boxes with the same number happen at the same time. An empty cell means that site takes no part in that

hand-off.

H.2

What each hand-off needs

Hand-off	Sent from	Appears in	What can hold it up
Client invitation	Console, **Client access**	The client's email, then the portal's invitation page	If the console cannot send email yet, it shows an invitation link that you send to the client yourself. An invitation stops working after 7 days.
Proposal for signature	Console, step **Proposal signed**	Portal, box at the top on **Overview**	Only a signer or the primary contact (the client's main person for the project) can sign. Other contacts see a heading that starts **Your signer signs this**.
Payment request	Console, **Payment terms**	Portal, **Payments** tab	The portal shows the **Payments** tab only to the primary contact and the billing contact. Others see the payment step on **Overview** as **Your billing contact handles this payment**.
Checklist	Console, step **Pre-Check signed**	Portal, **Checklist** tab	The checklist opens in the portal only after the step **Initial payment received** closes.
Meetings and site visits	Workbench client project page, or console **Schedule** pane	Portal, **Schedule** tab	Only staff assigned to the project can change the schedule. Everyone else can see it but not change it.
Validation plan	Workbench client project page, or console step **Validation plan signed**	Portal, box at the top on **Overview**	Staff can issue the plan only after the kickoff meeting is recorded as **Held**.
A scientist for the project	Console, **Team and activation**	Workbench, the client project page and the **Client project** choice in a new validation	A scientist who is not assigned sees **You are not assigned to this project. Ask your lab owner or an admin to add you to its team.**
Report	Workbench, **Publish to client portal**	Portal, **Documents** tab, under **Your validation report**	The client can download the report once the project's payments are settled and there is no financial hold (a stop on the project for money reasons). Until then, the portal lists it under **Not yet available**, with **Payment is required before you can download it.**
Messages	Portal, **Contact us** or the **Messages** tab	Console, **Messages** and **Unread client messages**. Workbench, the client project page.	A reply from the lab shows on the portal's **Messages** tab the next time the client opens it. The client gets no email about a reply.

Hand-off	Sent from	Appears in	What can hold it up
Staff access	Console, **Team**	Workbench sign-in	The console does not email staff invitations. Whoever creates the invitation in the console sends the invitation message to the invited person. The invitation stops working after 7 days.
Help request	Workbench, **Ask for help with this card** or **Ask for help** in the account menu	Console, **Today**, under **What is stuck, and for how long**, and the answer on the same card	No email goes either way: the scientist reads the answer on the card, and whoever is signed in to the console sees the question on Today.

H.3

What stays on one site

- Only the workbench calculates or changes results. The console and the portal show what a scientist approved in the workbench.
- A client never opens the workbench or the console. A client who signs in to the workbench sees **This workbench is for lab staff** and a link to the portal.
- The client receives the report only as a final copy that a scientist signed. A scientist copy or an unsigned client copy never reaches the portal.
- Payment terms are recorded only in the console, by a person who can sign in to it. If a scientist is ready to publish a report before the terms exist, the scientist can select **Notify the owner** in the workbench.
- When you sign out of the workbench, it also asks the console and the portal to sign you out. A session already open on those sites can stay active until it expires, though. So sign out on each site you have open.

REFERENCE

Glossary

This list explains the words you meet on the workbench, the console and the portal, and in the validation reports. Look a word up here whenever a page uses it and you are not sure what it means.

WHAT THIS CHAPTER IS FOR

Use this chapter when a word on a page or in this guide is new to you. The first table covers the sites, the people and the documents. The second covers words used in the workbench, and the third covers qPCR validation terms.

A

Sites, people and documents

Term	Meaning
MarinaBioLab	The laboratory that runs the validation and issues the validation report.
Workbench	The site where scientists run a validation, from the plan to the report. Full name: qPCR Workbench.
Console	The site where lab staff in the owner or admin role run each client project. Full name: MarinaBioLab owner console.
Portal	The site where a client follows a project, signs and downloads documents, and pays. Full name: MarinaBioLab Client Portal.
Client	The organization MarinaBioLab validates for, and the people there who use the portal.
Scientist	A member of lab staff who runs validations in the workbench and signs reports.
Owner, admin	Lab staff roles. In the console, an owner or admin who is on the console's owner list manages clients, projects, payments and the team. Someone who is not on that list cannot sign in to the console, whatever their role. In the workbench, an admin can open validations but cannot approve or sign a report.
Invitation	The email that gives a person access. A client's invitation gives access to one project in the portal. A staff invitation gives access to the workbench.
Sign-in link	The link in the sign-in email. Select it, then select **Continue to sign in** on the page it opens, and you are signed in. None of the three sites uses a password.
Today	The console's first page: what moved, what is stuck, what is ready, what needs you and the scientists' help requests.

Term	Meaning
On hold	A paused project. Its steps wait until someone resumes it in the console. The client still sees it.
Help request	A question a scientist sends from a workbench card, or from the account menu, to the console. The answer comes back to the card. No email is sent.
Project	One piece of work for a client, with its steps in order. Each project is either a validation project or a lab build project.
Proposal	The document that sets what a validation covers, what it costs and how it is paid. Its title is Validation Proposal. The client signs it in the portal.
Contract	The document a lab build client signs in the portal. Its title is Statement of Work.
Checklist	The list a client completes and signs in the portal before the validation. The console and the workbench call it the Pre-Check.
Validation plan	The document that lists what the validation covers. Staff issue it from the workbench or the console, and the client signs it in the portal.
Initial payment, final payment	The 2 payments of a validation project.
Refundable deposit	The refundable part of the initial payment. The proposal states its refund terms.
Balance	What is still owed.
Upfront payment, milestone payments	The payments of a lab build contract.
Scientist copy, client copy, final copy	The 3 versions of the validation report. The scientist copy is the lab's working version, and it never goes to the client. The client copy is the version made for the client. The final copy is the client copy, stamped and signed.
Instructions for Use (IFU)	The kit maker's manual that explains how to run a PCR kit. The portal calls it kit instructions or instructions for use.

B

Workbench terms

Term	Meaning
Validation	All the studies the lab runs for one client project, from the plan to the report.
Panel	The set of targets a PCR kit detects, for example the Urinary Tract Infection (UTI) panel.
Target	One organism or gene a panel detects.
Study	One type of test within a validation, such as LoD (limit of detection), precision or accuracy.
Run, plate, well	A run is one pass of a plate on the instrument. A plate holds the wells. A well holds one reaction.

Term	Meaning
Source file, run file	A source file is any file you add to a validation. A run file is a source file that the instrument saved after a run (an instrument export).
Mapping	The step where you assign each group of wells to the study it belongs to.
Proposal (a suggested answer)	A value or study the workbench or the console suggests from what it already holds, with its reason (its basis). Nothing is recorded until a person confirms it. Not the same as the client's Validation Proposal.
Plate and results	The workbench step with the plate map (the picture of the plate, every well and its result) and the calculated results with their acceptance criteria.
Equipment and kit record	The validation's internal record of the PCR instrument, its serial number and calibration, the extraction instrument, and the kit and its lot. The workbench asks for it last, before the calculation.
Co-pilot	The workbench's AI helper. It answers questions about the open validation and can propose changes. Nothing takes effect until you apply it. It never approves a result.
Specimen, sample	A specimen is what is collected from a patient. A sample is what goes into a well or a run.

C

qPCR validation terms

Term	Meaning
qPCR	Quantitative polymerase chain reaction. A polymerase chain reaction (PCR) copies a stretch of DNA again and again, one cycle at a time. In qPCR the instrument measures a signal after every cycle.
Cq (quantification cycle)	The cycle at which a well's signal crosses the threshold. A lower Cq means more target was present at the start. Some lab sheets, instrument exports and the report's LoD grid call the same value Ct.
LoD (limit of detection)	The lowest concentration at which the test still detects the target, judged by the pass rule in the validation plan.
LoQ (limit of quantification)	The lowest concentration the test can measure with stated precision and accuracy.
Replicate	One of several wells that test the same sample at the same level.
Detected, not detected	The call (the result word) for one target in one well.
Precision	How closely repeated measurements agree. The report prints repeatability for day 1 and reproducibility for day 2.
Coefficient of variation (%CV)	The standard deviation (SD) as a percentage of the mean.

Term	Meaning
Accuracy	How well the test's calls agree with the expected results. The lab reports positive accuracy and negative accuracy.
Cross-reactivity	A signal for a target caused by a different organism.
Interference	A change in a result caused by a substance in the sample, called an interferent.
Stability	Whether results stay the same after storage for a stated time and under a stated condition.
Linearity, R^2	How well the Cq values of a dilution series follow a straight line. R^2 is the fit statistic.
No-template control (NTC)	A well with no target material. A signal in an NTC points to contamination.
Positive control, negative control	Wells with a known positive or a known negative sample, run to show the plate worked.
Internal control	A target expected in every sample well. It shows that the reaction in that well ran.

REFERENCE

Troubleshooting

When something stops you, the site shows a message. This chapter lists those messages for each of the three sites, with what each one means and what to do. Each message is quoted exactly as the screen shows it, so you can search for the words you see.

WHAT THIS CHAPTER IS FOR

Use this chapter when a site shows a message you do not understand, or stops you from going on. Start with the 4 general steps in T.1. Then find your message in the table for your site, read what it means and do what the last column says.

T.1

Try these first

You are here: any of the three sites, with a message on the screen or a page that does not respond. At the end the problem is fixed, or you have asked the right person for help. About 5 minutes.

1. Read the whole message, slowly. Most messages say what happened and what to do next.

   Where Beside the control you used, or at the top of the page.
   You see A message that says what happened and what to do next, often with a button such as **Try again** or **Retry**.
   If different If the page is blank or frozen, go to the next step.

2. Reload the page.

   Where The reload button of your browser, near the address bar.
   You see The page again, showing what the site last saved.
   If different If the sign-in page opens, your sign-in has ended. Sign in again, and the site takes you back to the page you were on.

3. Before you repeat the action, look for your change on the reloaded page.

   Where The page you were on.
   You see Your change on the page, if the site saved it before the message appeared.
   If different If your change is not there, check your internet connection, then repeat the action once.

4 Ask for help, and include the details listed in the chapter Contacts.

Where The contact link or button on your site (see Contacts).
You see A message form, or an email address.
If different If you see neither and you are lab staff, ask the lab's owner or an admin. If you are a client, ask your MarinaBioLab contact.

Checkpoint: your change shows on the page, or you have sent your question with the details from Contacts. If all of this matched, you are done with this section.

T.2

Workbench messages

Message	Where	What it means	What to do
Sign-in could not be completed with that link. It may have expired or been used already. Request a new sign-in email below.	Workbench sign-in page, after you select an emailed link.	The link was already used or is too old.	Enter your email address again and select **Email me a sign-in link**. Use the newest email.
It may have expired or been used already. Ask the person who invited you to send a new one. If you have signed in before, you can request a sign-in email below.	Workbench sign-in page, under the title **Invitation link did not work**.	The link in your invitation email no longer works.	Ask the person who invited you for a new invitation. If you have signed in before, enter your email address and select **Email me a sign-in link** on the same page.
That code did not work. It may be mistyped or expired. Check the code, or send a new sign-in email.	Workbench sign-in page, under the code field.	The code is wrong or too old.	Check the code against the newest email and enter it again. If it still fails, select **Send a new sign-in email**.
Too many sign-in requests. Please wait 60 seconds and try again.	Workbench sign-in page.	The sign-in service limits how often you can request an email.	Wait 60 seconds, then select **Email me a sign-in link** once.
Sign-in temporarily unavailable for this account. Contact the lab owner or an admin.	Workbench sign-in page.	The sign-in service will not send a sign-in email to this account.	Ask the lab's owner or an admin to check your account.
Workspace assignment pending	A page of its own, after you sign in to the workbench.	Your account is not in the lab's workspace yet.	Ask the lab's owner or an admin to invite the email address shown on the page. The page checks again by itself. If it has stopped checking, select **Check again**.

Message	Where	What it means	What to do
This workbench is for lab staff	A page of its own, after you sign in to the workbench.	Your account is a client account, or has no staff role.	Select **Go to the client portal**. If you should have staff access, ask the lab's owner or an admin to change your role in the console.
Your session ended	A dialog over any workbench page.	Your sign-in expired or was ended on another device. Work you saved is kept.	Select **Sign in again** to go back to the same page. To copy text you have not saved yet, first select **Read this page first**. The page stays open, but you cannot change anything on it.
Your account changed	A dialog over any workbench page.	Another account signed in on this browser, for example in another tab.	Copy anything you typed and have not saved, then select **Reload for that account**.
Maintenance in progress	A dialog over any workbench page.	The workbench is in scheduled maintenance.	Wait. The dialog closes by itself when maintenance ends.
The workbench could not reach the service just now, so saving may fail. This page stays open and keeps checking.	A notice headed **Connection unavailable**, on any workbench page.	The workbench could not reach its server several times in a row.	Keep the page open. Do not save changes or record a decision until the notice clears.
You are offline. Saving will not work until the connection returns.	A notice on any workbench page.	Your computer is not connected to the internet.	Reconnect. If the notice then asks you to reload, reload before you go on.
The server is busy with many requests, so parts of this page may still be loading or out of date. This page tries again by itself in a few seconds.	A notice at the top of a workbench page.	The server got too many requests in a short time.	Wait, or select **Retry now**.
You do not have access to this validation	In place of a validation's page.	The validation is open only to the people assigned to it.	Ask the lab's owner or an admin for access. To leave the page, select **Go to Home**.
Validation not found	In place of a validation's page.	The link is wrong, or the validation is not in your workspace.	Open the validation from Home.

Message	Where	What it means	What to do
You are not assigned to this project. Ask your lab owner or an admin to add you to its team.	In place of a client project page.	You are not on the project's team.	Ask the lab's owner or an admin to assign you to the project in the console.
This validation changed while you were working. Refresh it before retrying.	Beside a save or a decision that was refused.	Someone else, or a finished job, changed the validation after you opened the page.	Reload the page, check what changed, then repeat your step.
No answer came back, so the workbench could not confirm whether this was recorded. It is being read again now: check it before you try again.	Beside a save or a decision when the workbench got no confirmation.	The workbench cannot tell whether your change was saved.	Wait for the page to refresh. Look for your entry before you repeat it.
You do not have permission to do this. Ask the lab owner or an admin if you need it.	Beside an action the workbench refused.	Your role does not allow the action.	Ask the lab's owner or an admin whether your role or assignment should change.
The largest file an upload can take is 10 MB, so it was not uploaded.	Sources, in the note under the drop area, after the file's name and size.	The file is over the size limit.	Export the run again as CSV, or split the file, and upload the smaller file.
Off while this validation is archived: it takes no new jobs. Unarchive it from the Archived list on Home first.	Beside a grayed-out button, such as Recalculate.	The validation is archived.	On Home, select the filter **Archived**, open the row's menu and select **Unarchive**.
Only a scientist can sign. or **Only a scientist can prepare and sign the final copy.**	Report, in the right rail under Before you approve.	You are signed in as an admin. Admins cannot approve, prepare or sign a report.	Ask a scientist on the validation to approve the report, or to prepare and sign its final copy. You can still publish it once it is signed.
Your account has no printed name yet, so this signature will be refused. The owner of this workspace sets it in Team on the owner console.	The signing dialog on Report.	Your account has no name for the report to print.	Ask the lab's owner or an admin to set your printed name in Team on the console, then sign.
No answer came back, and the report does not show this as recorded. Your typed name is kept: sign again when you are ready.	The signing dialog on Report.	The signature may not have reached the server.	Select **Sign and approve** or **Sign the final copy** again.

Message	Where	What it means	What to do
This page could not be displayed	In place of a workbench page.	An error stopped the page from showing. Work you saved is kept.	Select **Reload page** or **Go to Home**. You may need to type any unsaved text again.
Confirm the Equipment and kit record on Plan. Results are calculated after you confirm it.	Plate and results, or Mapping review, beside a grayed-out Recalculate.	Every decision is recorded, and the equipment and kit record waits.	Select **Open Plan**, record the equipment and kit record (section 1.4), then calculate.

T.3

Console messages

Message	Where	What it means	What to do
Sign-in could not be completed with that link. It may have expired or been used already. Request a new sign-in email below.	Console sign-in page, after you select an emailed link.	The link has expired or was already used. Each link works once.	Enter your email address again and select **Email me a sign-in link**. Use the newest email.
This account does not have access to the owner console. Sign in with an owner email.	Console sign-in page.	Your account exists, but its email address is not on the console's owner list. The console signed you out on this browser.	Sign in with an email address that is on the owner list, or ask the person who runs the lab's server to add yours to the list.
Too many sign-in requests. Please wait 60 seconds and try again.	Console sign-in page.	The sign-in service limits how often it sends a sign-in email.	Wait 60 seconds, then select **Email me a sign-in link** once.
The sign-in service did not answer in time, so we cannot tell whether the email was sent. Check your inbox; if nothing arrives within a minute, send it again.	Console sign-in page.	No answer came back, so the email may or may not be on its way.	Check your inbox first. If nothing arrives within 1 minute, select **Email me a sign-in link** again.
That code did not work. Check it and try again, or request a new email.	Console sign-in page, under the code field.	The emailed code is mistyped or has expired.	Enter it again. If it still fails, select **Send again** and use the code from the newest email.
That code did not match. Enter the current 6-digit code.	Console, two-step verification page.	The authenticator code was wrong, or the app had already moved to a new one.	Enter the code the app shows now.

Message	Where	What it means	What to do
Your sign-in has ended. Sign in again to continue.	Console, two-step verification page.	The email sign-in ran out before you finished the second step.	Select **Sign in again** and repeat both steps.
This console session ended	Console, a full page in place of the one you were on.	Your sign-in ended or changed on this browser (for example in another tab), so the page was cleared.	Select **Reload the console** and sign in. Check whether your last change was saved before you repeat it.
Your sign-in could not be confirmed, so this page is paused. What you typed is kept, and the check runs again by itself.	Console, a bar across the top of any page.	The console could not check your sign-in, so it paused the page. Nothing you typed is lost.	Wait for the check to run again, or select **Check now**.
You are offline. Changes are not being saved until the connection returns; what you typed is kept.	Console, a bar across the top of any page.	The browser has no network connection.	Reconnect, wait for the bar to clear, then save.
The server did not confirm this change. Refresh to see whether it was saved before you try again.	Console, on any form after you save.	The console sent your change, but no answer came back. It may or may not be saved. The console does not send it again by itself.	Select **Refresh** or reload the page, look for the change, and only then try again.
The server could not be reached. Check your connection and try again.	Console, on any list or page that is loading.	The console could not load that part of the page. Nothing was changed.	Check your connection, then select the retry button on that part of the page.
Another account has signed in on this browser, so nothing was sent.	Console, on any form.	A different owner account signed in on this browser in another tab.	Copy anything you typed that is not saved. Then reload the page to continue as that account, or sign out and sign in as yourself.
Owner console unavailable	Console, a full page.	The console could not confirm your sign-in or load the page.	Select **Try again** after a moment, or **Go to Home**. If it keeps happening, email the support address under **Help**. Say which page you were on and the time.

Message	Where	What it means	What to do
Page not found	Console, a full page.	The web address does not exist in the console. The link may be mistyped or the page may have moved.	Select **Go to the owner console** and find the page from the menu.
This page is made for a wider window. You can read it here; use a laptop to change it.	Console, at the top of most pages on a phone.	You can read the page on a narrow window, but its controls are made for a laptop. **Home** and **Client projects** do not show this note.	Use a laptop, or widen the window.
This browser is too old for the owner console. Update it, or use a current version of Chrome, Edge, Firefox or Safari.	Console, at the top of the page.	The browser is missing something the console needs.	Update the browser or switch to a current one.
This document was changed elsewhere while you were editing. Your edits are still on screen and will not be saved over it. Copy what you need, then load the current version.	Console, proposal form.	The proposal was saved from another tab or by another owner while you were editing.	Copy any text you need, select **Discard my edits and load the current version**, then make your changes again.
Nothing was uploaded. A proposal is issued and waiting for the client's signature, and this file would take its place, so the client could no longer sign it. To change the proposal, use the proposal builder above.	Console, step 1, under **Attach a separate SOW file** (SOW means statement of work).	The upload was refused because it would replace the proposal the client is about to sign.	Leave the issued proposal in place. To change it, edit it in the proposal builder above.
Terms changed since you started: review before recording.	Console, on a form under **Payment terms**.	The payment terms or their status changed after you opened the form, for example because a payment arrived. What you typed is kept, and nothing is recorded yet.	Read the listed changes. Select **I have reviewed the changes** and save, or select **Close this form** if your entry is no longer possible.

Message	Where	What it means	What to do
The client cannot pay online yet: the signed proposal has no Shopify order prices.	Console, **Payment terms**, under **Shopify orders**.	The signed proposal carries no store prices, so no card checkout can be prepared.	Select **Open the proposal**, then **Start change order**. Check the box **Prepare signed Shopify order prices** and enter the prices. Then save and issue the change order so the client can sign it. Until then, take the payment by wire transfer, check or ACH (a US bank transfer) and record it.
Only the people on the countersigner list can countersign. Ask one of them to sign in and countersign.	Console, lab build project, step 1.	Your account is not on the list of people who may countersign a contract for MarinaBioLab.	Ask a person on that list to sign in and countersign.
The project is not active. Activate it under Team and activation first.	Console, **All steps and overrides** and the pages of steps 6, 7 and 8 (**Site visits**, **Validation studies** and **Report release**).	You cannot complete a step by hand while the project is a draft or waiting for the client to accept the invitation.	Activate the project under **Team and activation** (section 2.7), then return to the step.
Read only: this account can view the follow-ups but cannot record decisions. For a project in your own lab workspace, assign yourself in Team and activation, then refresh.	Console, step 3, under **Pre-Check follow-ups**.	You are not on this project's staff.	Assign yourself under **Team and activation**, then select **Refresh**.
Mail is not switched on yet, so no email is sent. Emails wait in the queue until it is.	Console, **Client access**, under **Emails**.	The lab's outgoing email is off, so the project's emails wait in the queue and none has gone out.	Until outgoing email is on, send invitation links yourself. Ask the person who runs the lab's server to turn it on.
Not available yet	Console, **Team and activation**, under **Set up and activate in one step**.	Something the one press needs is missing, for example a published notification template. The block names it.	Do what the block names, or use the step-by-step form below it (section 2.7).

T.4

Portal messages

Message	Where	What it means	What to do
We could not complete sign-in with that link. It may have expired or been used already. Enter your email and we will send you a new one.	Portal sign-in page, after you select an emailed link.	The link has expired or has already been used.	Enter your email address, select **Email me a sign-in link** and use the newest email.
Wait a minute before asking for another link.	Portal sign-in page.	You asked for a sign-in email twice within a short time.	Wait a minute before you ask again. Check the spam or junk folder for the first email.
That code did not work. Check it and try again, or request a new email.	Portal page **Check your email**, under the code field.	The emailed code is mistyped or has expired.	Enter it again. If it still fails, select **Send the link again** and use the code from the newest email.
This invitation has expired. Ask MarinaBioLab for a new invitation.	Portal invitation page, under **Invitation expired**.	The invitation ran out before you accepted it.	Select **Ask for a new invitation**, or ask your MarinaBioLab contact for a new one.
Invitation unavailable	Portal invitation page.	You cannot accept the invitation with this sign-in, or the invitation no longer works. There are a few possible causes. You may be signed in with a different email address from the one we invited. The invited address may already belong to another client in the portal. Or the invitation may have expired or been replaced.	Select **Sign in with a different email** and use the invited email address. If that is not the cause, ask us for a new invitation.
We could not check your invitation right now. Try again in a few minutes.	Portal invitation page.	The portal could not read the invitation.	Wait a few minutes, then select **Try again**.

Message	Where	What it means	What to do
We could not confirm whether your invitation was accepted.	Portal invitation page, in a red box after you select **Accept invitation**.	The portal got no confirmation after you selected **Accept invitation**. The invitation may have been accepted.	Select **Sign in again and check your projects**. If the project is listed, the invitation was accepted. If it is not, open the invitation link again.
You have signed out	Any portal page.	Your sign-in ended, or you signed out in another tab. The portal cleared the page. Anything already saved is safe.	Sign in again in the same tab. The portal takes you back to the page you were on, and brings back unsaved work from that tab.
We could not check your sign-in. This page is hidden until we can, and nothing you typed has been lost.	The top of any portal page.	The sign-in service did not answer. The page stays open behind the notice, with what you entered.	Wait, or select **Try again**. The portal also checks again by itself.
Another account signed in	Any portal page.	A different account signed in to the portal in this browser, so the page of the earlier account was cleared.	Select **Open your projects** to continue as the account now signed in. To use your own account, sign out and sign in again.
Invoices and payments for this project are shared with your organization's billing contact.	Portal, when you open a payment page from a link.	Your role on the project does not include payments.	Select **Back to overview**. Ask your billing contact or primary contact about the invoice.
This project is not available. It may have been closed, or your access to it has changed.	Portal, when you open a project from a link.	The project is not on your list of projects.	Select **Back to your projects**, or **Contact us** to ask about your access.
Only the project's signer or primary contact can sign this document. Ask them to sign, or contact MarinaBioLab.	Portal signing page, under the form.	Your role on the project does not include signing.	Ask your lab's signer or primary contact to sign in and sign it. If you think you should have the signer role, send us a message.

Message	Where	What it means	What to do
We could not confirm your signature. Try again; your signature will not be recorded twice.	Portal signing page, under the form.	The portal got no confirmation after you signed.	Select **Sign the proposal**, **Sign the plan** or **Sign the contract** again. Your signature is not recorded twice.
This document changed while you were reading it. This page is loading the current version. Read it before you sign.	Portal signing page, under the form.	We issued a newer version while the page was open.	Read the version now on the page, check both boxes again and sign.
This payment changed. Review the amount, then continue.	Portal page **You are going to Shopify to pay securely**, under the buttons.	The payment's terms changed after the page loaded.	Check the amount on the page, then select **Continue to Shopify** again.
We could not confirm that your payment page was prepared. Try again shortly.	Portal page **You are going to Shopify to pay securely**, under the buttons.	The portal got no confirmation that the payment page is ready.	Wait a moment, then select **Continue to Shopify** again. If it fails again, check the payment's status on the **Payments** tab before you try again.
Choose a PDF, PNG or JPEG file of at most 3 MB.	Portal, **Checklist** tab, beside **Add a file**.	The file is of another type, empty or larger than 3 MB.	Choose a PDF, PNG or JPEG file of 3 MB or less.
This file did not pass the security check. Upload a clean, unencrypted copy.	Portal, **Checklist** tab, beside **Add a file**.	The security check refused the file.	Add a clean copy of the file that has no password or encryption.
We could not confirm whether your answers were saved. They are kept here; select Save and continue to check and try again.	Portal, **Checklist** tab, under the section title and beside **Save and continue**.	The portal got no confirmation that your answers were saved. They are still on the page.	Check your connection, then select **Save and continue** again. The same answers are not saved twice.
This checklist changed since you opened it. Your unsaved answers are kept; review them and save again.	Portal, **Checklist** tab.	A colleague saved the checklist while you were working on it.	Read the section again, then select **Save and continue**.

Message	Where	What it means	What to do
The download link has expired or could not be opened. Try again.	Portal, **Documents** tab, under a file's row.	The download did not start.	Select the file's download button again.
You are offline. Changes are not being saved. This page will refresh when the connection returns.	The bottom of any portal page.	Your browser lost its internet connection.	Reconnect to the internet. The page refreshes by itself. If you were saving when the connection dropped, save again.
The portal is temporarily unavailable. Try again shortly.	Any portal page, in a red panel or message.	The portal's service did not answer.	Wait a short time, then select **Try again** or repeat what you were doing.
This page could not be displayed	Any portal page.	The portal could not display the page.	Select **Try again**, which keeps what you have entered. If the page still fails, select **Reload page**.

REFERENCE

Contacts

To reach the right person fast, use the contact link or button on the site you are using. Each site either opens a message form or shows the support email address the lab set for it.

WHAT THIS CHAPTER IS FOR

Use this chapter when you are stuck and need a person. It tells you where to ask on each site, which addresses the lab publishes, and what to put in your message so the lab can help you quickly.

C.1

Where to ask

You are	Use	What happens
A client with a question about a project	**Contact us** at the top of every portal page or in the account menu, or the **Messages** tab	A message form opens. Your message goes to your MarinaBioLab team, and the reply appears on the project's **Messages** tab.
A client who cannot sign in	The line **Trouble signing in?** on the portal's sign-in page	That line shows the email address the lab has set for portal help.
A client with an invitation that does not work	The line **Questions about this invitation?** on the invitation page. On an expired invitation, **Ask for a new invitation**.	The line shows the lab's email address. **Ask for a new invitation** opens a new email to the lab in your email program, with the address filled in.
A scientist	**Ask for help with this card** on a decision card, or **Ask for help** in the account menu while a validation is open. The line **Need help?** on the workbench's sign-in page, error pages and account menu	A help request goes to the console, where an owner or admin sees it, and the answer comes back to the card (section 1.11). The Need help? line shows the lab's support address. If the lab has not set one, it reads **Need help? Ask the owner of this workspace.**
An owner or admin	**Help** at the bottom of the console's menu	The **Help** window lists **Contact support** with the support email address, the link to the console's guide (**Read the owner guide**) and the titles of the lab's guides for the console under **Runbooks**.

C.2

Addresses the lab publishes

These email and web addresses appear on the three sites and their legal pages.

For	Address	Stated on
Questions about the Terms of Service, privacy requests and account concerns	`accounting@marinabiolab.com`	The Terms of Service and Privacy Policy pages
Terms of Service	`www.mblvalidation.com/terms`	The link **Terms** on each site
Privacy Policy	`www.mblvalidation.com/privacy`	The link **Privacy** on each site
Training guides for the three sites	`www.mblvalidation.com/tutorial`	The link **Help and training guides** in the portal's account menu, **Read the owner guide** under the console's **Help**, and **Tutorial** in the workbench's rail. The page holds the lab's written guides and training material.
The workbench	`www.mblvalidation.com`	The Terms of Service page
The portal	`portal.mblvalidation.com`	The Terms of Service page
Reagent orders	`order.marinabiolab.com`	The link **Order reagents** in the portal's account menu
The lab's public website	`www.marinabiolab.com`	The Privacy Policy page

The lab's postal address for formal notices is printed in the Terms of Service. Use the address shown there.

C.3

What to send when you ask for help

- The site and the page you were on, and the time the problem happened.
- The message on the screen, word for word.
- The reference code, if the page shows one. On an error page, or after something fails, it may be hidden under **Technical details**. Select **Technical details** to show it.
- Your project's name or code, if the question is about a project.

NO PATIENT INFORMATION

Never put patient names or other patient information in a message, a file name or an upload. The portal's message and checklist forms, and several upload forms in the workbench and the console, show the same warning.