MarinaBioLab
qPCR validation platform

End-to-end test guide for the three sites

Step-by-step checks for lab admins, run with made-up projects and made-up clients. Each step has a picture of the screen and a box for the result. No earlier knowledge of the sites is needed.

STARTS HERE

Owner console

The staff site. You create the test projects, issue documents, record payments, holds and waivers, and close everything again.

CLIENT VIEW

MarinaBioLab Client Portal

What clients see. You play each test client: accept invitations, sign, follow payments and dates, and download the report.

SCIENTIST VIEW

qPCR Workbench

The scientists' site. A scientist runs a made-up validation from plan to signed final copy and publishes it to the test client.

Covers the three sites. Test data only.

END-TO-END TEST GUIDE

Contents

Start here 5

1 The three sites 5

2 Who does what 5

3 What is set up, and what you bring 6

4 How to read a step 7

The map of the test 8

Before the test day 10

5 Test data only 10

6 People, accounts and browsers 11

7 Test data sheet 12

8 Settled questions 14

Scenario A: Setup 16

A-01 Sign in to the owner console 17

A-02 Today shows no test project 18

A-03 Check the team 19

A-04 Create project P1 20

A-05 Test projects stay out of the normal list 21

A-06 Create project P2 21

A-07 Make your Scientist account 22

A-08 Sign in to the workbench as the Scientist 23

A-09 Put the staff on P1 24

A-10 Put the staff on P2 25

A-10a Hand over or end a role on P2 26

Scenario B: The full validation path on P1 27

B-01 Build the proposal: the kit and the inputs 28
B-01a Build the proposal: the payment and the text 29
B-02 Save, preview and issue the proposal 30
B-03 Invite the client's people 31
B-04 Set up and activate P1 32
B-05 C1 accepts the invitation 33
B-06 The client who accepted is listed 34
B-07 C1 signs the proposal 35
B-08 The signature is on record 36
B-09 The first payment, before you record it 37
B-10 Record the deposit as a wire payment 38
B-11 Approve the Pre-Check 39
B-12 C1 fills in and signs the checklist 40
B-13 Read the answers and decide the follow-up 41
B-14 Book the kickoff meeting 42
B-15 The meeting shows on Schedule 43
B-16 Record the meeting as held 44
B-17 Write the validation plan 45
B-17a Issue the validation plan 46
B-18 C1 signs the validation plan 47
B-19 Book the site visit, confirm it, record it 48
B-20 The scientist signs in and finds P1 49
B-21 Start the validation, with its run files 50
B-21a Record the reagent lot and upload the files 51
B-21b Record the reference organism 52
B-22 Plan inputs: type the six answers, record them together 53
B-23 Look at the mapping 54
B-23a Confirm the report scope, first time 55
B-23b Record the equipment and kit record 56
B-23c Calculate for the first time 57
B-23d Confirm the plan row on a new Report scope card 58
B-23e Ask for help on a card, and answer it 59
B-24 Recalculate and accept the results 60
B-24a Generate the client copy 61
B-24b Write the wording the final copy needs 62
B-24c Prepare the final copy and read it 63
B-25 Sign the final copy 64
B-26 Publish the report to the portal 65
B-27 The report on project step 10 66
B-28 The report waits for the final payment 67
B-29 Final payment, then the download 68
B-30 Publish from the console (optional) 69
B-31 A message and its reply 69
B-32 Progress 70

Scenario C: Payments on P2 71

C-01 Bring P2 to a signed proposal 71
C-02 Record a part payment 72
C-03 Record the rest 73
C-04 Record a refund 74
C-05 The refund shows to the client 75
C-06 You ask for a waiver of the balance 76
C-07 A second person approves the waiver 77
C-08 The waiver shows to the client 78
C-09 Card payment through Shopify (not run) 79
C-10 Pause P2, then resume it 80

Scenario D: A lab build on P3 81

D-01 Create the lab build 81
D-02 Put the staff on P3 82
D-03 Build and issue the contract 83
D-04 Invite C1 and switch P3 on 84
D-05 C1 signs the contract 85
D-06 The lab build's tabs 85
D-07 Countersign the contract 86
D-08 Record the upfront payment 87
D-09 The two milestone payments 88
D-10 The lab build's payments 89
D-11 Mark the workstreams achieved 90
D-12 Publish a welcome document 91
D-13 Close the lab build 92

Scenario E: Negative checks 93

E-01 An account that is not on the list cannot sign in 94
E-02 A revoked invitation 95
E-03 An invitation link already used 96
E-04 The wrong account 97
E-05 Roles decide what each person sees 98
E-06 The report waits for payment 98
E-07 A financial hold blocks the report 99
E-08 An admin cannot sign a report 100
E-09 One client copy per run 101
E-10 Completing a project step by hand warns first 102
E-11 A signed-out visit to a project address 102

Scenario F: Cleanup 103

F-01 Revoke what is still open 104
F-02 Cancel, then archive 105
F-03 Archive the test validation 106
F-04 What stays on record 107
F-05 Today is as it was 108
F-06 The test log 109

Results sheet 110

Troubleshooting 114

READ THIS FIRST

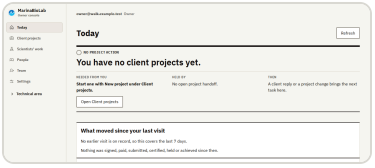
Start here

This guide walks you through a full test of MarinaBioLab's three websites. You take made-up projects for a made-up client through every stage a real project goes through, and check that each site shows the right thing to the right person. You do not need to know the sites already: every step says where to click and what you should see.

1

The three sites

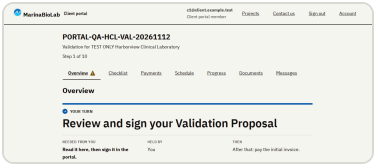
MarinaBioLab checks that other laboratories' qPCR tests work as they should. This is called a validation. Three websites share the work, and you use all three. Each site's address is printed under its name.



The owner console

https://qpcr-admin.vercel.app

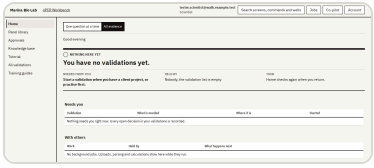
The staff site: client projects, documents, payments and the team. Admins use it too, despite the name. Most of the test happens here.



The MarinaBioLab Client Portal

https://portal.mblvalidation.com

What clients see. A client signs, pays, confirms dates and downloads the report here. You play the client yourself, in a second browser.



The qPCR Workbench

https://www.mblvalidation.com

The scientists' site. A scientist uploads the instrument's results, checks them and makes the report. You do these steps too, with a second account you make in A-07.

2

Who does what

Badge on the step	Who it is	Where they work
Admin	You. You do almost every step.	Browser A, signed in to the owner console
Test client	Also you, playing a client (C1, C2, C3 or C4) with a test inbox	Browser B, or a private window (browser C). Never browser A.
Admin + test client	You, switching between browser A and browser B in one step	Each line says which site it is on
Scientist	You again, with your Scientist address. Only a Scientist can sign the report.	Browser S, in the workbench

Badge on the step	Who it is	Where they work
Second admin or owner	Another lab admin, or the owner. A red box in the step says what to ask for.	C-07

3

What is set up, and what you bring

ALREADY SET UP FOR YOU

- **Console sign-in.** Each lab admin's address is on the console's access list. At your first sign-in the console asks you to add the console to an authenticator app (A-01).
- **A second admin for C-07.** Any other lab admin can approve the waiver you ask for.
- **A countersigner for D-07.** The lab keeps a countersigner list. Only a person on it can countersign.
- **Invitation emails.** They reach every address at marinabiolab.com, including plus addresses.
- **Sign-in emails.** They reach every address that has an account. Nothing had to be set up.

New staff accounts. When the server is set up for it, a Team invitation also makes the sign-in account for a new staff address (question Q8). When the server is not set up for it, the Stuck? line of A-07 gives another way.

What you bring:

- [ ] **Your work mailbox at marinabiolab.com.** Each test client and your Scientist account uses a plus address of this mailbox. Test one plus address first (section 6). The test takes a minute.
- [ ] **An authenticator app on your phone,** for the console's two-step verification.
- [ ] **Three browsers or browser profiles.** A is for you as Admin. B is for the test client. S is for you as the Scientist. Private windows serve as browser C.
- [ ] **The test files.** F1 is three small run files in the folder `files` beside this guide. You make F2 and F3 yourself (section 7).
- [ ] **Nothing to ask the owner first.** The addresses are in section 1, and every question in section 8 is settled.
- [ ] **Time.** About one working day, in two or three sittings (see the map on the next page).

4

How to read a step

Each step is one box, with its picture inside. A box never breaks across two pages.

A-04 **Admin**	The step number, then who does it. Write the number on any screenshot or note you take.
Console **Portal** **Workbench**	The site where the step starts. When a line carries another site's name, do that line on that site.
The line in italics	Why the step exists, in one sentence.
Where, Do, You see	Where to go, what to do, and what should happen. Words in bold are exactly what the screen says. Tick Pass only when everything under You see happened.
Note	Something to know before you act. "Select" always means click, or tap on a phone.
Check first	Part of the step could not be confirmed, or the step showed a fault when it was tried. The Check first line says what to look for. Write down what you saw.
Stuck?	What to try when the screen does not match the step. Troubleshooting, at the back of this guide, has more.
Second admin or owner and a red box	You cannot do this step alone. The box says whom to ask and what to ask for.
The box at the top	Most pages of the three sites open with one box. It says what is true now, what is needed from you, who holds it (Held by) and what comes next (Then). Read it first.
Choose a step or project details	On a project page in the console, the project's steps run down the page, with the current one open. The project's own pages are Client access, Team and activation, Messages, ClickUp, and All steps and overrides. They sit behind Choose a step or project details at the top of the page. When a Where line names one of these pages, open Choose a step or project details first.
The pictures	Every picture was taken on a private copy of the sites with made-up data, so names, addresses, amounts and dates differ from yours. The pictures in C-09 and E-05 show an earlier version. Go by the You see line, and write down any label that differs.
☐ Pass ☐ Fail ☐ Not run	Tick one. If the step fails, write what you saw on the note line. Take a screenshot and name it after the step, for example `B-10-fail.png`.

READ THIS FIRST

The map of the test

The test has six scenarios. Run them in this order, because each one uses the projects and people that the earlier ones set up. The times are estimates.

Client	The outside laboratory the work is for. In this test it is made up: TEST ONLY Harborview Clinical Laboratory.
Project	One piece of work for one client, set up in the console. You create three: P1 and P2 are validations, and P3 is a lab build.
Pre-Check	A list of questions the client answers before the lab work starts. The portal calls it the checklist.
Project step	A project moves through numbered stages in the console, such as project step 1, Proposal signed. This guide's own steps look like A-04, so the two never mix.

Scenario	What you do	Who you need	About	Steps
A. Setup	Sign in, create P1 and P2, make your Scientist account, put the staff on the projects, and hand over or end a role.	You	35 minutes	11
B. The full validation path on P1	The proposal, invitations, signatures, payments, the Pre-Check, a meeting, the plan, a site visit, the scientist's work, a help request, the published report and its download.	You, in all three roles	4 to 5 hours	44
C. Payments on P2	A part payment, the rest, a refund, a waiver that a second person approves, and a pause and resume.	You, and a second admin for C-07	50 minutes	10
D. A lab build on P3	A contract, its countersignature, three payments, the workstreams and a welcome document.	You, and a person on the countersigner list for D-07	45 minutes	13
E. Negative checks	Sign-ins, invitations, roles, holds and signatures the sites must refuse.	You, in all three roles	45 minutes	11
F. Cleanup	Revoke, cancel and archive, then check that Today is as it was.	You	20 minutes	6
All six			**7 to 8 hours**	**95**

Breaks and waits

Plan two or three sittings. Good places to stop are after A, after B-13, while you wait for the meeting to end before B-16, after B-19, after B, and after D. Each scenario starts with a short "You are here" box and ends with a checkpoint, so you can pick up where you left off.

You need one other person: a second admin, for a few minutes in C-07. If you are not on the countersigner list, you also need a person on it for a few minutes in D-07. Agree on a time with each of them in advance.

When a step does not match what you see, try its Stuck? line first, then Troubleshooting at the back of this guide.

READ THIS THE DAY BEFORE

Before the test day

This chapter holds the rules, the people and the test data the scenarios refer to. Read it once before the test, and keep it open while you work.

5

Test data only

THE ONE RULE

Use only the made-up projects, clients and files in this chapter. Never put a real client's name, a real person's email address, a real run file, a patient identifier or a real price into any of the three sites.

The console will not stop you from doing any of the things below. You have to follow these rules yourself.

1. Every test client name starts with TEST ONLY, and every project identifier starts with PORTAL-QA-. The console keeps these projects off Today and out of the normal project list. You see them only when **Show test projects** is turned on.
2. Leave every real project alone. If a screen shows a project without TEST ONLY in its name, close it.
3. Never invite a real client or a real person. Use only your own test addresses from section 7.
4. Never record a payment, refund, waiver or hold on a real project, and never complete a real project's step by hand.
5. No real money moves. You record payments by hand as wire payments with TEST references. Card payment through Shopify is not part of this test (question Q2).
6. Never link a test client to a store customer in Shopify. Leave **Link** under **Review store customers** alone. Never link or connect QuickBooks. Never open ClickUp settings on a test project.
7. Never select **Calendar** on a meeting or a visit. **Save local schedule** sends no invitation. Calendar sends a real one.
8. Never select **Resend** on the Emails list, and never answer a decision card on Today.
9. Never change Settings (the calculator defaults) or Panel registry. Both apply to the whole lab.
10. Never change a real person's role on Team, and never use **Remove access**. Removing access cannot be undone.
11. Never upload a real run file, a client document or anything with patient information. In the workbench, upload only the three F1 files.
12. In the workbench, never check **Remember this PCR instrument for the lab**, or the same box for an extraction instrument. A checked box saves an equipment record for the whole lab, and later validations are offered that record.

13. Pause a project, or hand over or end a role, only on P2, as C-10 and A-10a say. Never on a real project.
14. The sites propose values they already know: a last quoted price, a lot from another validation, plan answers, report facts, a reply starter. Leave every proposed value alone unless the step tells you to use it. In this test you type the values this guide gives.
15. Ask for help only on the test validation, and only in B-23e. Answer only the TEST ONLY request.
16. Never publish a test report to a real client's project. Read the Recipient row before you select **Sign and publish**.
17. Never change the access lists or any other setting of the sites. Those belong to the owner and the person who runs the lab's server.

6

People, accounts and browsers

Keep each client in its own browser or private window, so that a client's sign-in never mixes with yours.

Who	Account	Browser	Used in
You (Admin)	Your own account. It is on the console's access list.	A: the console, and the workbench in E-08	All scenarios
Second admin	Any other lab admin, or the owner	Their own browser	C-07
Scientist	Your Scientist address. You make it a Scientist in A-07 and A-08. It is not on the console's access list.	S	A-08, B-20 to B-26, E-01, E-09, F-03
Countersigner	A person on the countersigner list (this may be you)	A	D-07
Client C1	Your C1 address. Primary contact and Signer.	B	Scenarios B to E
Client C2	Your C2 address. Billing contact. Also the billing email of P1, P2 and P3.	C, a private window	E-05
Client C3	Your C3 address. Signer only.	C	E-04, E-05
Client C4	Your C4 address. Invited and then revoked.	C	E-02, E-04

PLUS ADDRESSES

A plus address is your own address with a plus sign and a tag before the @. Mail to `name+c1@marinabiolab.com` arrives in the inbox of `name@marinabiolab.com`, but the sites treat it as a different person.

Test it first. From your normal mail, send an email to your C1 address. It should arrive in your own inbox within a minute or two. If it does not, look in Junk Email. If it is not there either, stop and tell the owner. The lab's mail service needs plus addressing turned on, and the client and Scientist steps cannot run until it is.

Use addresses at marinabiolab.com only. Invitation emails are not sent to plus addresses anywhere else. The example.test addresses in the pictures cannot receive email. Each address you invite gets an account, and that account stays after the test.

7

Test data sheet

Put the date of the test, as year, month and day, in place of <YYYYMMDD>, so each run has its own identifiers.

Item	Value
Your test mailbox	Write your own work address here, once: _____@marinabiolab.com
Your test addresses	The same address with a tag after your name. C1: `name+c1@marinabiolab.com`. C2: `name+c2@`. C3: `name+c3@`. C4: `name+c4@`. Scientist: `name+sci@`. For example, name@marinabiolab.com uses name+c1@marinabiolab.com for C1.
Validation project P1	Client legal name `TEST ONLY Harborview Clinical Laboratory`; billing email: C2's address; identifier `PORTAL-QA-HCL-VAL-<YYYYMMDD>`; type Validation
Validation project P2 (payments)	`TEST ONLY Harborview Clinical Laboratory payments`; C2's address; `PORTAL-QA-HCL-PAY-<YYYYMMDD>`; Validation
Lab build project P3	`TEST ONLY Harborview Clinical Laboratory build`; C2's address; `PORTAL-QA-HCL-LB-<YYYYMMDD>`; Lab build; panel `TEST ONLY panel`, total `1000.00`
Proposal inputs (test inputs, not prices)	Kit: the Urinary Tract Infections Panel PCR Kit (MBLUTI004). Instrument: `QuantStudio 5`, and no other. Sample type: `Urine`, and no other. What we cover: the one line `Analytical Accuracy & Specificity`. Stability length (days) 3; Cost per test 10.00; Total reactions 100
Payment references	`TEST-WIRE-001`, `TEST-WIRE-002` and so on; the date received is today
Meeting	Purpose `TEST ONLY Kickoff meeting` (the form starts with Kickoff meeting. Put TEST ONLY in front of it); starts 5 minutes from now, ends 10 minutes from now
PCR machine in the checklist	Machine Name: `QuantStudio 5`

Item	Value
Help request (B-23e)	Request: `TEST ONLY: practice help request, no action needed.` Answer: `TEST ONLY: practice answer.`
Site visit	Visit number as suggested; `TEST ONLY, 1 Example Street`; city `Testville`, state TX, postal code `00000`
Signer name and title in the portal	`Test Director`, `Laboratory Director`
Reagent lot	Lot unknown. The reason to type: `TEST ONLY synthetic files. No reagent kit was used.`
Validation name	`TEST ONLY HCL synthetic run`
Evidence file F2	A one-page PDF named `TEST-ONLY-evidence.pdf` that reads "TEST ONLY. No patient information." and is under 3 MB
Hold evidence F3	The SHA-256 fingerprint of F2, a long code that identifies the file. In Windows, run this command in the folder that holds the file: `certutil -hashfile TEST-ONLY-evidence.pdf SHA256`
Synthetic run files F1	Three files in the folder `files` beside this guide: `x2-synthetic-accuracy-0.csv`, `-1.csv` and `-2.csv`. They are made up, and they are the exact files the platform's own automated test uploads. Upload all three together. Never rename or edit them. Never upload any other run file.
Texts for the workbench	`workbench-texts.txt`, in the same folder: the made-up texts you type in B-17a and in B-21b to B-24b, ready to copy.

8

Settled questions

All eight are settled, so you have nothing to ask before the test day. Q1, Q3, Q4 and Q6 are answered. Q2, Q5, Q7 and Q8 are decided with this guide's defaults. The owner can change each of those four.

No.	Question	Steps	Answer
Q1	Which mailbox do the test clients C1 to C4 use, and do invitation emails reach it?	B-03, B-05, E-02 to E-05	Answered. Plus addresses of your own mailbox (section 6). Invitation emails reach them.
Q2	Is there a Shopify test gateway for practice card payments?	C-09	Decided. The Shopify card step is not run. Mark C-09 Not run. The owner can change this.
Q3	Which synthetic run file may testers upload, and which plan combinations can it deliver?	B-01, B-17, B-17a, B-21 to B-27	Answered. The three F1 files in the folder `files` (section 7). They deliver one combination: the UTI panel, Accuracy, QuantStudio 5, Urine, with no storage and no timepoint. B-01 and B-17 are written to fit it.
Q4	Who is on the countersigner list, and who is the second admin for C-07?	C-07, D-07	Answered. The people on the lab's countersigner list countersign. Any other lab admin approves the waiver.
Q5	Is this a practice run only, or should the cleanup also follow the protocol of the live synthetic cleanup, with its record sheet and its final scan for anything left behind?	Scenario F	Decided. A practice run on TEST ONLY projects, with this guide's own cleanup in scenario F. The owner can change this.
Q6	Where is the scientist's printed name for reports set?	B-24c, B-25	Answered. In the console, on Team, use Set printed name on the Scientist's row. Until a printed name is set, the report prints the name the Scientist types.
Q7	May a test project have ClickUp settings, and do lab build workstreams need them?	D-08, D-11	Decided. No ClickUp settings on test projects. In D-11 you mark the workstreams achieved in the console. The console also makes no ClickUp list for a project marked as a test. Ask the owner about ClickUp before D-08. The owner can change this.

No.	Question	Steps	Answer
Q8	Is the server set up so that a Team invitation makes the sign-in account for a new staff address?	A-07	Decided. A-07 tries the Team invitation first. If the console says no invitation was created because the address has no sign-in account yet, the step's Stuck? line gives another way. The owner can say which applies on the test day.

SCENARIO A

Setup

In this scenario you sign in to the owner console, create two test projects, make a Scientist account for yourself and put the right staff on the projects. Almost everything happens in the owner console, in browser A. No client sees any of it.

You are here	This is the first scenario. Before you begin, go through Start here, section 3. Then test one of your plus addresses (section 6).
Time	About 35 minutes.
Steps	11, from A-01 to A-10a

A-01 Admin Sign in to the owner console

Console

Almost every step in this guide starts in the owner console, so you sign in first.

WHERE Browser A. Open the owner console at https://qpcr-admin.vercel.app. The page is headed **Sign in to the owner console**.

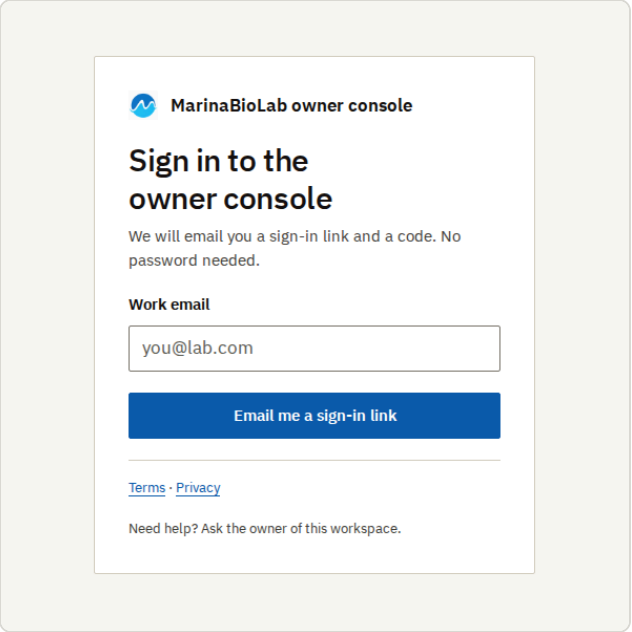
DO Type your work email address in **Work email**. Select **Email me a sign-in link**.

DO Open your mailbox. Open the sign-in email and select the link in it. Back in the browser, select **Continue to sign in**.

NOTE You can use the code from the email instead of the link. Type the code in **Enter the code from the email**. Then select **Sign in with the code**.

YOU SEE The console opens on Today. If the lab uses two-step verification, the page **Two-step verification** comes first. It asks for the 6-digit code from your authenticator app. The first time, it shows a QR code so you can add the console to the app.

STUCK? If no email has arrived after 5 minutes, look in your spam folder. If the page says this: **This account does not have access to the owner console. Sign in with an owner email.** Your address is not on the console's access list. Check the spelling of the address you typed first. If the spelling is right, stop and tell the owner.



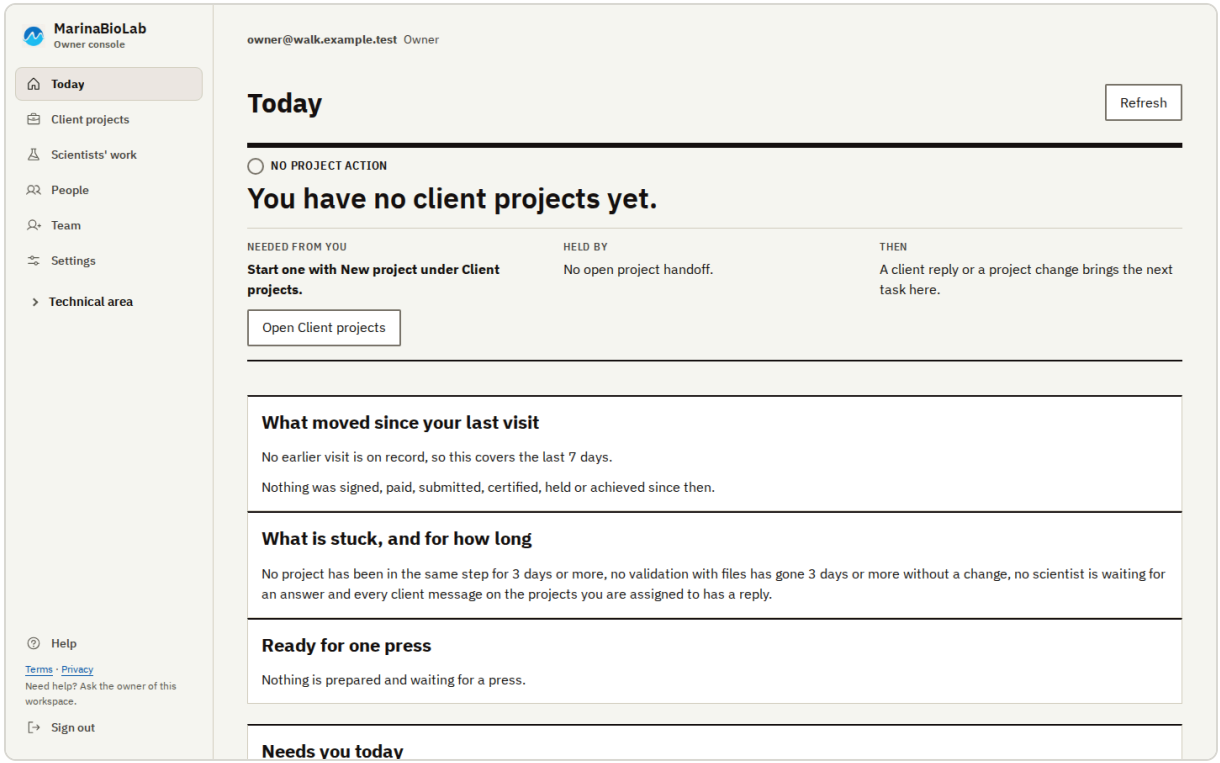
A-01 The sign-in page before you type anything.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-02 Admin Today shows no test project Console

Test projects must never show on the lab's everyday screens. Here you write down how Today looks before the test.

WHERE	**Today**, the page that opens after you sign in.
DO	Read the box at the top of the page. Then read the three blocks under it: **What moved since your last visit**, **What is stuck, and for how long** and **Ready for one press**.
DO	Read the cards under **Needs you today** and under **With clients**. If Today shows **Waiting on someone else**, read the cards under it too.
DO	Read the 4 counts under **At a glance**. Write them in this step's note line.
YOU SEE	No box, block, card or count mentions TEST ONLY or PORTAL-QA-. You compare the counts again at F-05.
STUCK?	If a TEST ONLY project already shows here, an earlier test was left open. Tick Fail, take a screenshot and tell the owner. You can still go on with the test.



A-02 Today on the practice copy, before the test. Your lab's blocks, cards and counts are different.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-03 Admin Check the team

Console

Team lists everyone who works in the lab's sites. You come back here in A-07 to add your Scientist account.

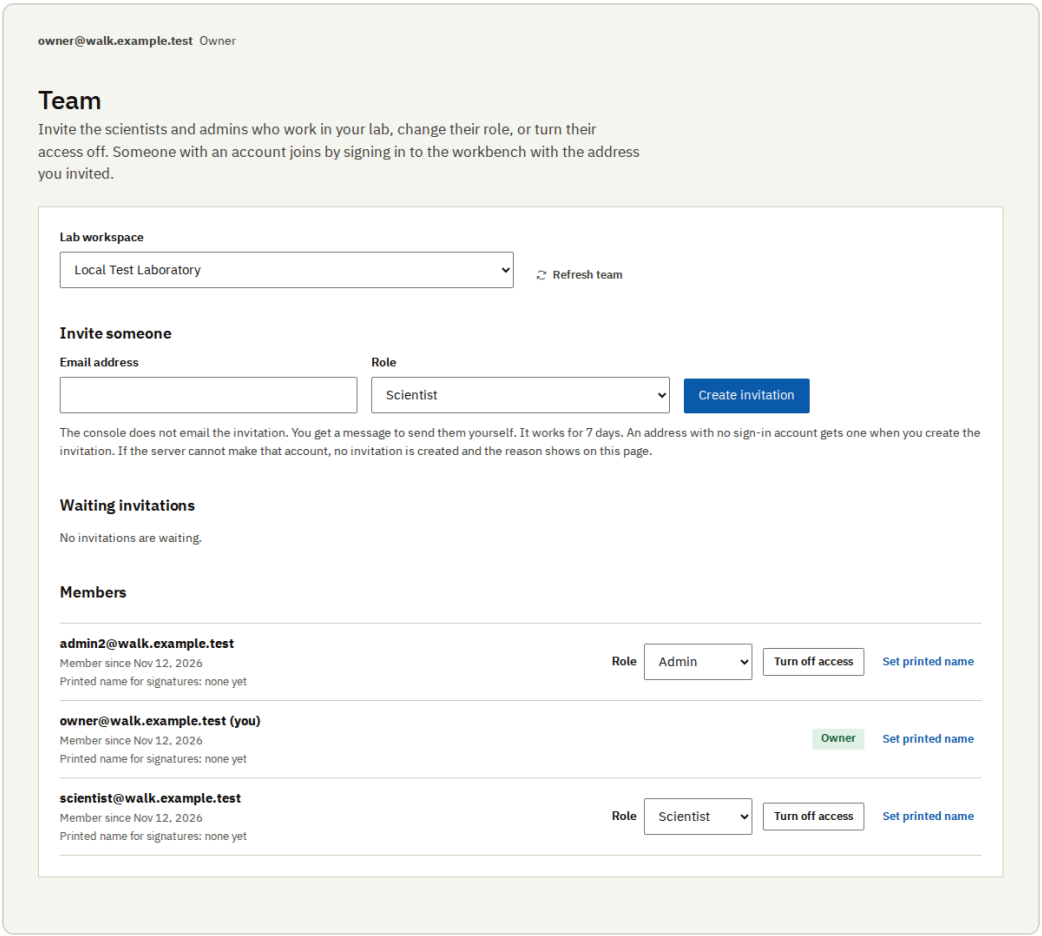
WHERE **Team**, in the menu on the left.

DO In **Lab workspace**, choose the lab's workspace. Find your own row under **Members**.

YOU SEE Your own row reads Owner. It has no role list and no Turn off access. That is normal. The console calls everyone who can sign in to it an owner. Another lab admin's row reads Admin. That is their role in the workbench, and they can still sign in to the console.

NOTE Every lab admin can already sign in to the console. Any of them can be your second admin in C-07.

STUCK? If Team stays empty, select **Refresh team**. If it is still empty, tick Fail and tell the owner.



A-03 Team on the practice copy. Your own row reads Owner. Each row has Set printed name.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-04 Admin Create project P1 Console

P1 is the main test project. Scenario B takes it from the first document to the final report.

WHERE **Client projects**, in the menu on the left.

DO Select **New project**. A form headed **New client project** opens.

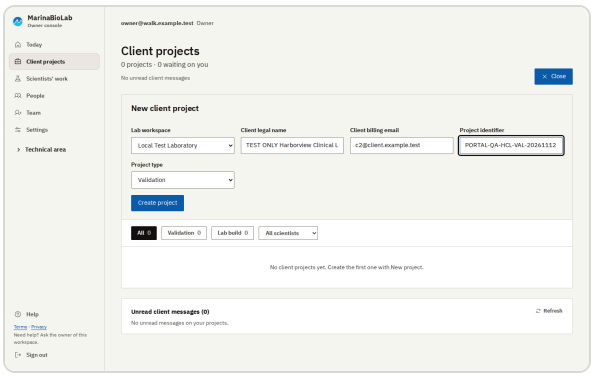
DO In **Lab workspace**, check that the lab's workspace is chosen. When the lab has only one workspace, the console chooses it for you.

DO Fill in **Client legal name**, **Client billing email** and **Project identifier** with P1's values from the test data sheet (section 7).

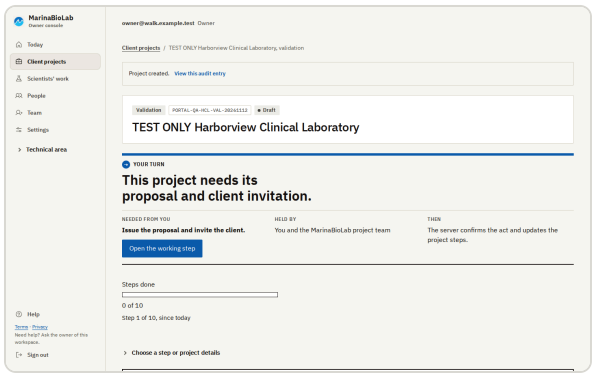
DO Leave **Project type** on Validation. Select **Create project**.

YOU SEE The message **Project created.** P1 opens, with the client legal name as its title. It is a draft for now. You switch it on in B-04. The box at the top of the page says: This project needs its proposal and client invitation.

STUCK? If P1 does not open, read the message on the form. Correct the field it names. Then select **Create project** again. If it fails again, tick Fail and take a screenshot.



A-04a The form filled in with P1's values. The billing address in the picture ends in example.test.



A-04b P1 just after Create project.

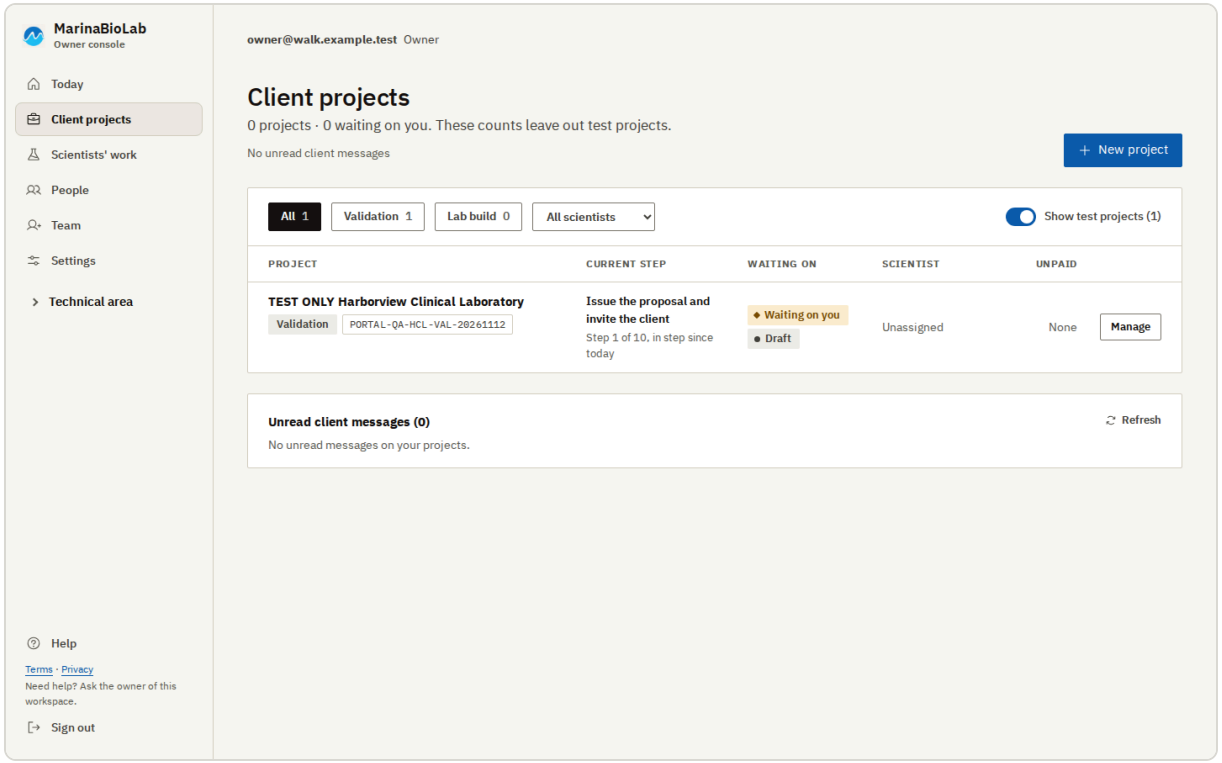
☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-05 Admin Test projects stay out of the normal list

Console

The lab's normal project list must not fill up with test projects.

WHERE	**Client projects**, in the menu on the left.
DO	Look for P1 in the list. It should not be there.
DO	Turn on **Show test projects**.
YOU SEE	P1 now appears in the list. The number beside **Show test projects** is how many test projects there are.
STUCK?	If P1 shows before you turn on **Show test projects**, tick Fail and take a screenshot.



A-05 The list with Show test projects turned on.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-06 Admin Create project P2

Console

P2 is a second test project, used only for the payment checks in Scenario C.

DO	Do A-04 again from its Where line, this time with P2's values from the test data sheet.
YOU SEE	The same as in A-04, with P2's name.
STUCK?	Use the Stuck? line of A-04.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-07 Admin Make your Scientist account

Console

Only a Scientist can sign a report, and one account cannot be both Admin and Scientist. So you give yourself a second account, on a plus address of your own mailbox.

WHERE Browser A. **Team**, in the menu on the left.

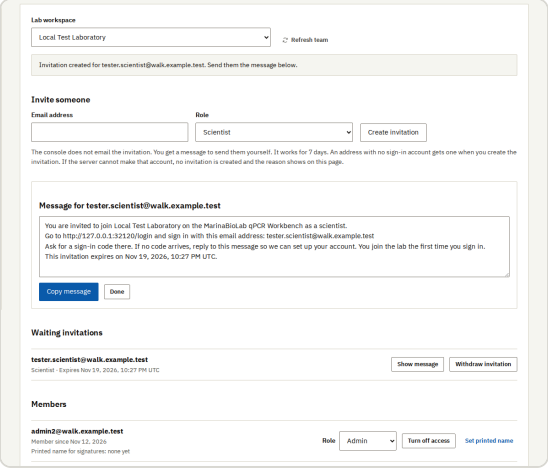
DO Under **Invite someone**, type your Scientist address from the test data sheet (section 7) in **Email address**. Leave **Role** on Scientist. Select **Create invitation**.

YOU SEE A line that begins **Invitation created for**. The address is listed under **Waiting invitations**. The console also shows a message to send. You do not need that message.

NOTE When the server is set up for it, the Team invitation also makes the sign-in account for the new address (Start here, section 3). No portal email is involved.

NOTE If you made this account in an earlier test, skip A-07 and A-08 and mark both Not run.

STUCK? A red box may begin with these words: No invitation was created. This address has no sign-in account yet. In that case the server is not set up to make sign-in accounts. Do this instead. Open P1 from the project list, with the test projects shown. Open **Choose a step or project details**, then **Client access**. Type the Scientist address in **Invite client email**. Check Signer. Select **Invite client**. That gives the address a sign-in account, and nothing else. It also sends a portal invitation email to the address. Delete that email. Never open its link, and never sign in to the portal with this address. Then go back to Team and select **Create invitation** again for the same address. You revoke the client invitation in F-01. If you see this message: **The owner console service could not complete this request.** Tick Fail, write down the time and tell the owner. If Team refuses the address for another reason, write down its message and tick Fail. Then ask a Scientist who has signed in before to do the Scientist steps (B-20 to B-26, E-01, E-09, F-03).



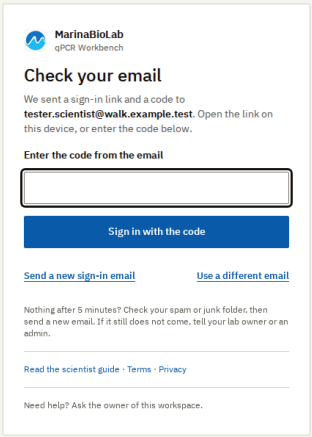
A-07 Team after Create invitation. The address waits under Waiting invitations, and the message to send is shown.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-08 Scientist Sign in to the workbench as the Scientist Workbench

The first sign-in turns the invitation into a working Scientist account. The console cannot switch P1 on until its scientist has signed in once.

WHERE	Browser S, your third browser or browser profile. Open the workbench at https://www.mblvalidation.com. The page is headed **Sign in to qPCR Workbench**.
DO	Type your Scientist address in **Work email**. Select **Email me a sign-in link**.
DO	Open your own mailbox. Mail to the Scientist address arrives there. Find the newest sign-in email. Type its code in **Enter the code from the email**. Select **Sign in with the code**. You can use the link in the email instead.
YOU SEE	The workbench opens on Home.
DO	Go back to browser A. On **Team**, select **Refresh team**.
YOU SEE	Your Scientist address is now under **Members**, with the role Scientist. It is gone from **Waiting invitations**.
NOTE	Write down how long the sign-in email took to arrive.
STUCK?	A page headed **Workspace assignment pending** may show. If it stays for more than a minute, go to browser A. Check that A-07 left a row under **Waiting invitations** for exactly this address. If no sign-in email comes, test the plus address as in section 6.



A-08 The page after Email me a sign-in link.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-09 Admin Put the staff on P1 Console

A project needs named staff before it can go live, and a scientist only sees projects they are on.

WHERE Browser A. Open P1 from the project list, with the test projects shown. Open **Choose a step or project details**, then **Team and activation**.

DO Find **Project staff**. The table marks three roles Required: Site visit coordinator, Validation scientist and Operations administrator.

DO If the form under the table is closed, select **Assign a staff member**.

DO In **Staff member**, choose your Scientist address. In **Role on this project**, choose Validation scientist.

DO In **Assignment reason (audited)**, type a reason, for example TEST ONLY: practice run. Audited means the console keeps a permanent record of the reason.

DO Select **Save staff assignment**.

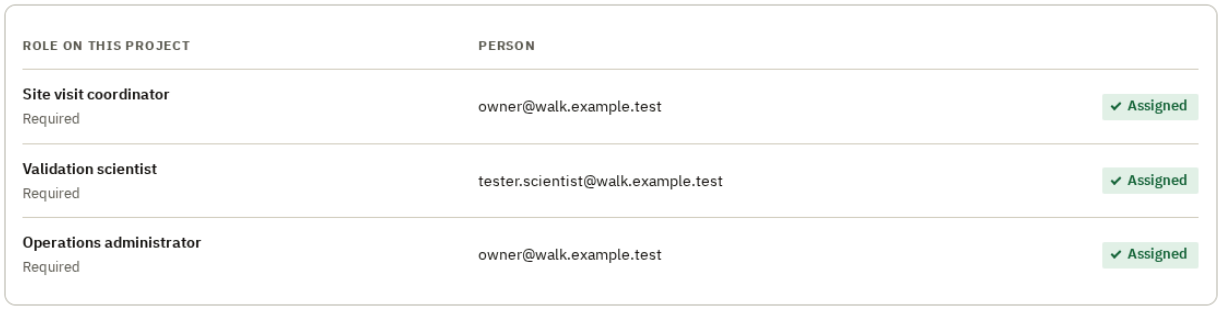
DO Do the same twice more, with your own address as the staff member. The first time, choose Operations administrator as the role. The second time, choose Site visit coordinator. Type a reason and save each time. Holding these roles lets you change meetings and visits later.

YOU SEE After each save, a line that begins **Staff assignment saved**. After the last save, each of the three roles reads Assigned, and the table says 3 of 3 required roles assigned.

NOTE Your own address must hold a role, because only P1's staff can switch P1 on (B-04). To change who holds a role later, use **Hand over or end a role** (A-10a).

NOTE Do not open ClickUp settings for P1. ClickUp is the lab's task tracker, and test projects stay out of it.

STUCK? If your Scientist address is not offered in **Staff member**, go back to A-08. The address is offered only after its first sign-in to the workbench. If a save says the role already has a valid staff assignment, that role is taken. Choose a role that is still free.



A-09 Project staff after the third save.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-10 **Admin** Put the staff on P2 **Console**

P2 needs its own staff too.

DO	Do A-09 again from its Where line, this time on P2, with all three roles. P2 marks the same three roles Required.
YOU SEE	The same as in A-09.
STUCK?	Use the Stuck? line of A-09.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

A-10a Admin Hand over or end a role on P2 Console

Staff change during a project. The console can hand a role to another person, or end a role the project does not need. The audit trail keeps who held it.

WHERE P2. Open **Choose a step or project details**, then **Team and activation**.

DO First give your own address one more role, a role that P2 does not require. If the form under the table is closed, select **Assign a staff member**. In **Staff member**, choose your own address. In **Role on this project**, choose Finance owner. In **Assignment reason (audited)**, type TEST ONLY: role to end. Select **Save staff assignment**.

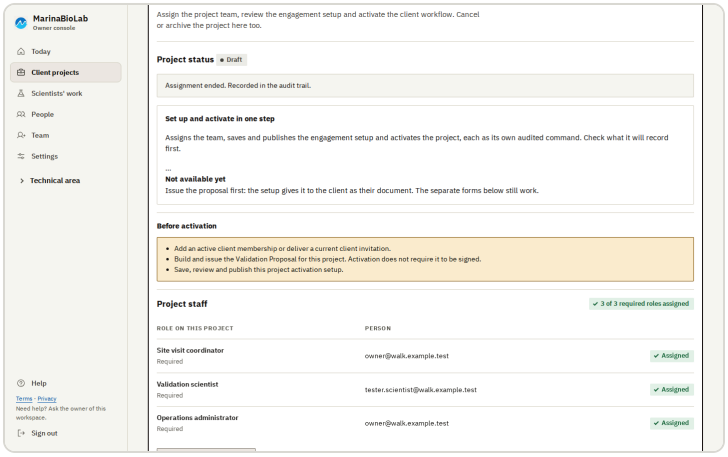
DO Open **Hand over or end a role**. In **Role to hand over or end**, choose the line that begins Finance owner. In **Who takes the role**, choose **Nobody: end this assignment**.

DO In **Reason for the change (audited)**, type TEST ONLY: end of a practice role. Select **Save role change**.

YOU SEE The line Assignment ended. Recorded in the audit trail. Finance owner is no longer listed as Assigned. The three required roles still read Assigned.

NOTE A role the project requires cannot be left empty. If you tried, the server would refuse with this message: This project's workflow needs this role, so it cannot be left empty. Hand it to another active staff member instead. You do not need to try it.

STUCK? If Finance owner is not offered in **Role on this project**, choose any role the table does not mark Required. If there is no **Hand over or end a role** on the page, mark the step Not run and tell the owner.



A-10a Team and activation after Save role change. The line reads Assignment ended.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

CHECKPOINT

If every step in A matched, P1 and P2 exist, both have their staff, and your Scientist account works. You are done with A. Take a short break before B, which is the long one.

SCENARIO B

The full validation path on P1

In this scenario you take P1 through every stage of a real client project: the proposal, the client's signature, payments, a checklist, a meeting, a plan, a site visit, the scientist's work and the final report. You play three people in turn: the Admin in browser A, the test client in browser B, and the scientist in the workbench.

You are here	You finished A. P1 exists and has its staff.
Time	About 4 to 5 hours. That includes two waits and the scientist's part. Good places for a break are after B-13, during the wait for the meeting to end before B-16, and after B-19.
Steps	44, from B-01 to B-32

B-01 Admin Build the proposal: the kit and the inputs Console

The proposal tells the client what the work is and what it costs. Everything else in B starts from it.

WHERE Browser A. P1, project step 1 **Proposal signed**.

DO In the form **Validation Proposal**, open **Kit from the IFU catalog**. Kits that can be issued come first, under **Can be issued**. Choose MarinaBiolab Urinary Tract Infections Panel PCR Kit (MBLUTI004), IFU rev 02. IFU means instructions for use, the leaflet that comes with a kit.

DO Under **Instruments**, type QuantStudio 5. Select **Add**. Under **Media**, look for Urine. The kit may have filled it in. If Urine is not listed, type Urine and select **Add**. Add nothing else to either list.

DO Type 3 in **Stability length (days)**. Type 10.00 in the cost per test. Type 100 in **Total reactions**.

DO Under **Calculators**, find the column Size in the table. Its list reads **Choose a size**. Choose Small. Leave the rest under Calculators as it is.

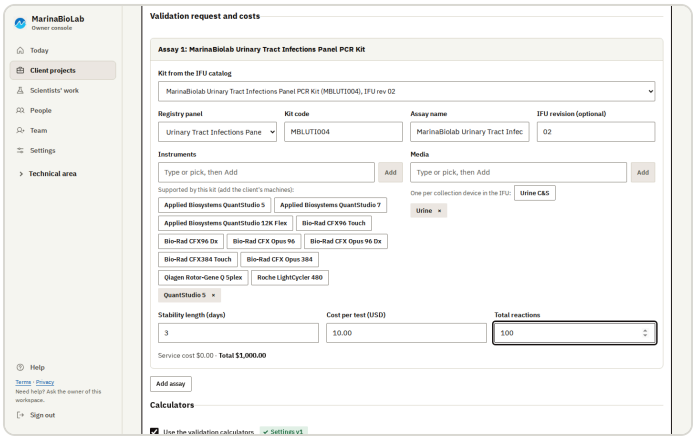
YOU SEE Under the three numbers, the form reads Service cost $0.00 and Total $1,000.00.

NOTE Under the cost per test, the form may show the last price the lab quoted for this kit, with the client and the date, and a button that begins Use. Do not select that button. In this test the cost per test is 10.00.

NOTE A line under the calculators says that 100 total reactions are sold but the validation needs 149. That is expected with these test inputs. Leave it.

NOTE The three run files of B-22 can deliver one study on one instrument and one sample type (question Q3). If you add another instrument or sample type here, the plan gets a row that the files cannot deliver, and project step 10 never finishes.

STUCK? If the kit is not in the list, tick Fail. Take a screenshot and tell the owner. The rest of B needs this proposal. If the form says unsaved changes were restored, select **Discard my changes**.



B-01 The kit and the inputs filled in.

☐ Pass ☐ Fail ☐ Not run Note

B-01a Admin Build the proposal: the payment and the text Console

The proposal also says how the client pays. In this test the client pays a deposit first and the balance at the end, with no card checkout.

WHERE The same form, further down.

DO Under **Payment structure**, choose **Refundable deposit + balance**. Leave the percent at 50 and the refund window at 14 days. The percent box is labeled **Upfront service percent** until you clear the Shopify box two lines down. After that it is labeled **Deposit percent**.

DO Under **Document text**, in **What we cover (one per line)**, delete every line except Analytical Accuracy & Specificity.

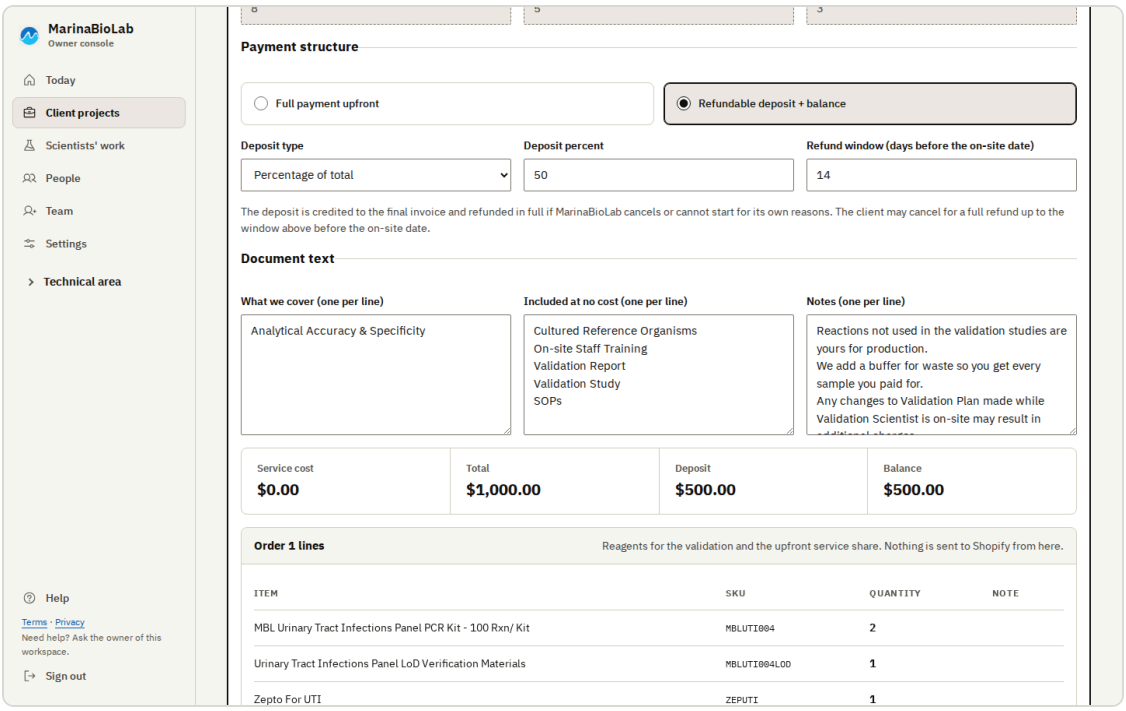
DO Clear the box **Prepare signed Shopify order prices**. Shopify is the lab's online shop. With this box clear there is no card checkout, and the client pays by wire, check or ACH (a bank transfer).

YOU SEE The totals strip reads Service cost $0.00, Total $1,000.00, Deposit $500.00 and Balance $500.00.

NOTE Never select **Open store cart**. It opens the lab's real online store.

NOTE Keep only that one line under What we cover. Another study line adds a plan row that the run files cannot deliver.

STUCK? If the totals strip shows no Deposit, check that **Refundable deposit + balance** is chosen.



B-01a Payment structure and the text, filled in.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-02 Admin Save, preview and issue the proposal

Console

Issuing sends the proposal to the portal, where the client can read and sign it.

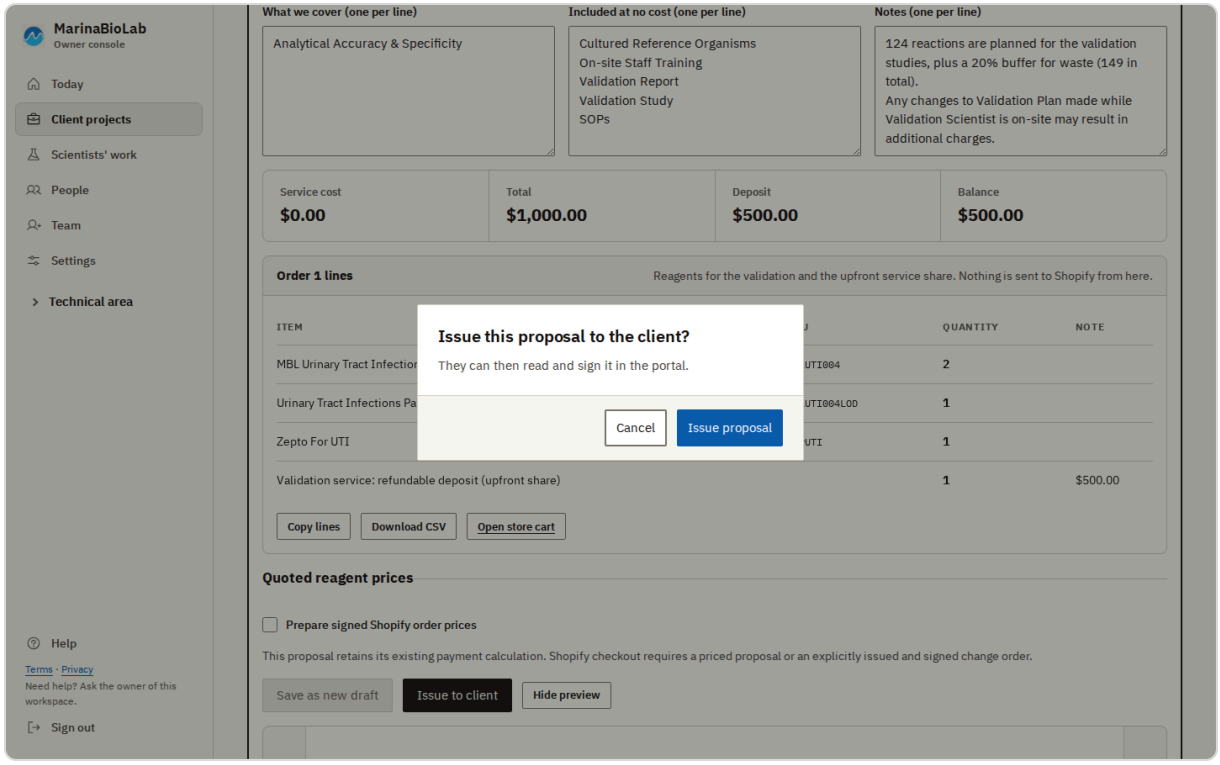
DO Select **Save draft**. Once a draft exists, the same button reads **Save as new draft**.

DO Select **Preview document**. The preview opens below the form. Read it.

DO Select **Issue to client**. In the window that opens, select **Issue proposal**.

YOU SEE After you save, the page says **Draft saved. Review the preview, then issue it to the client.** After you issue, it says **Issued. The client can now read and sign the proposal in the portal.** The status chip begins **Issued, awaiting client signature**.

STUCK? If you miss the Issued message, reload the page and read the status chip. If the chip begins Issued, the proposal went out. If it does not, select **Issue to client** once more. If **Save draft** is refused with a red box about each panel's size, go back to B-01 and choose Small in the column Size.



B-02 The window that asks before the proposal goes out.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-03 Admin Invite the client's people

Console

A client sees P1 in the portal only after you invite them. You invite three test clients, each with different roles.

WHERE P1. Open **Choose a step or project details**, then **Client access**.

DO In **Invite client email**, type C1's address. Under **Client roles**, check Primary contact and Signer. Leave Billing contact clear. Select **Invite client**.

NOTE While **Invite client email** is empty, the console may offer a button that begins Use, with the billing email you entered for this project. That address is C2's. Use the button only for C2.

DO Now invite C2. Type C2's address in the email box. Check Billing contact first. Then clear Primary contact and Signer. Select **Invite client**.

DO Now invite C3. Type C3's address in the email box. Check Signer first. Then clear Billing contact. Select **Invite client**.

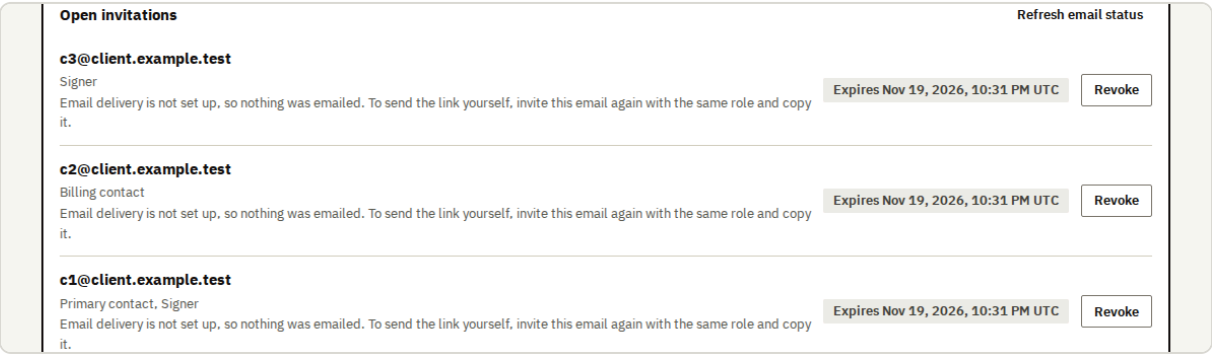
NOTE The console keeps at least one role checked, so the last checked box is grayed out. That is why you check the new role before you clear the old ones. The boxes start with the roles you chose for the person before.

YOU SEE After each invitation, the page says **Invitation created.** A card below it shows the email address, the roles, how the invitation is delivered and the expiry date, 7 days ahead. Under **Open invitations** there is one row per person. Each row shows the roles and **Revoke**. The row for your Scientist address from A-07 is there too. Leave that row alone until F-01.

DO If a card reads **You send the link**, select **Copy invitation link**. Paste the link into a text file. You need the links in B-05 and E-05.

NOTE The invitation email reaches every address at marinabiolab.com, plus addresses included (Start here, section 3). If a card shows **Waiting for email** and nothing arrives, wait 15 minutes. Then invite the same address again. The card then offers **Copy invitation link**.

STUCK? If a row shows the wrong roles, a second invitation does not correct it. The console refuses a second invitation with other roles and tells you to withdraw the first one. Select **Revoke** on that row. Then invite the address again. If you see this message: **Mail is not switched on yet, so no email is sent. Emails wait in the queue until it is.** Select **Copy invitation link** and open the link yourself in browser B.



B-03 Open invitations after the three invitations.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-04 Admin Set up and activate P1 Console

Activating switches P1 on, so the client can work in it. One press saves the engagement setup, publishes it and activates P1. Each of these is recorded on its own, with its reason, in the audit trail.

WHERE P1. Open **Choose a step or project details**, then **Team and activation**. Find the block **Set up and activate in one step**.

DO Read the fields under **What will be recorded**. **Client notification** names the published template the client is sent. **Client document** names the issued Validation Proposal. **Engagement scope** is filled in from the proposal's line Analytical Accuracy & Specificity.

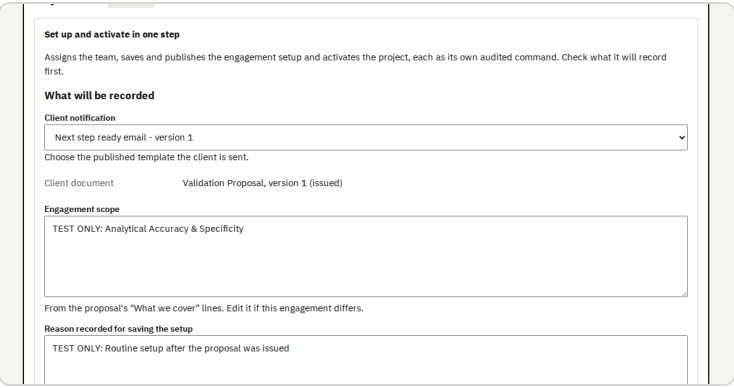
DO Each reason box already holds a standard reason. Type TEST ONLY: in front of each one and keep the rest.

DO Check **I have reviewed and approve this engagement setup.** Read the list under **When you press, in this order**. Select **Set up and activate**.

YOU SEE A line begins Set up and activated. It says that 3 commands are recorded in the audit trail. P1's status reads Active. The box at the top says what comes next.

NOTE The roles you gave in A-09 are already held, so the block does not ask you to name anyone. The client notification is the lab's published template, so C1's emails read as a real client's would. They go only to your plus addresses.

STUCK? If the block reads **Not available yet**, no notification template is published. Use the longer forms further down instead. Open **Set up the engagement**. In **Notification source**, choose **Write client notification content**. Write a subject and a body that both start with TEST ONLY. In **Document access source**, choose the option that reads Use the issued Validation Proposal. Describe the work in **Engagement scope**. Type a reason in **Setup reason (audited)**. Select **Save activation setup draft**. Then check **I have reviewed and approve this exact saved engagement setup.** Type a reason in **Publication reason (audited)**. Select **Publish reviewed activation setup**. Last, type a reason in **Activation reason (audited)** and select **Activate project**. If the one press stops, a red box begins Stopped at step. It says what was recorded before the stop and what the server named. Fix what it names and press again. If it names an explicit active project assignment, give your own address a free role on P1 (A-09). If a staff member has never signed in, do A-08 first.



B-04 Set up and activate in one step, with TEST ONLY: in front of each reason, before the press.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-05 Test client C1 accepts the invitation Portal

Now you act as the client for the first time. A client must accept the invitation before they can see P1.

WHERE Browser B, your second browser or a private window. Open C1's invitation link from B-03, or the link in C1's invitation email.

DO On **Sign in**, type C1's address in **Email address**. Select **Email me a sign-in link**.

DO Open C1's inbox and select the link in the sign-in email. Or type the code from the email and select **Sign in with the code**.

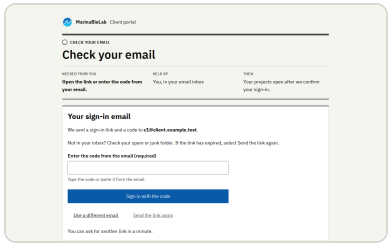
DO On **Accept your project invitation**, check the box that starts **I accept this invitation**. Select **Accept invitation**. Then select **Open project**.

YOU SEE After you ask for the link, the page says **Check your email**. After you accept, it says **Invitation accepted**, with **Your project access is ready.** under it. Then P1 opens on its Overview tab. The box at the top reads **Your turn** and has the button **Review and sign**.

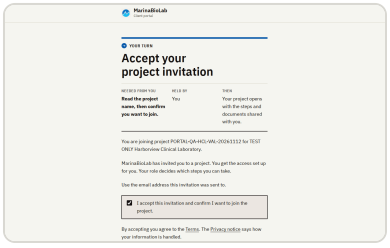
NOTE Under the box, Overview may show a block that says 2 actions for you to record, with a name box and a button under each. Leave both alone. This test does not use them.

NOTE This step works only if C1's plus address receives mail (section 6). Write down how long the sign-in email took to arrive.

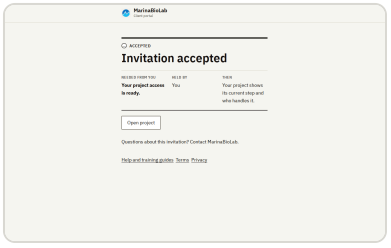
STUCK? If no sign-in email arrives within 5 minutes, look in the Junk folder of your mailbox. Then ask for the email once more. If you see **Invitation unavailable**, select **Sign in with a different email** and sign in with C1's address.



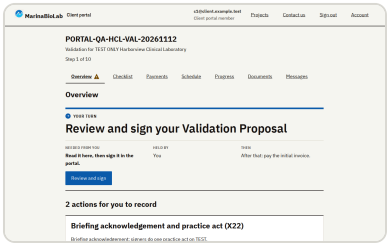
B-05a The portal's sign-in page, opened from the invitation link, after Email me a sign-in link.



B-05b The invitation, with the box checked.



B-05c After Accept invitation.



B-05d The top of Overview after Open project.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-06 Admin The client who accepted is listed

Console

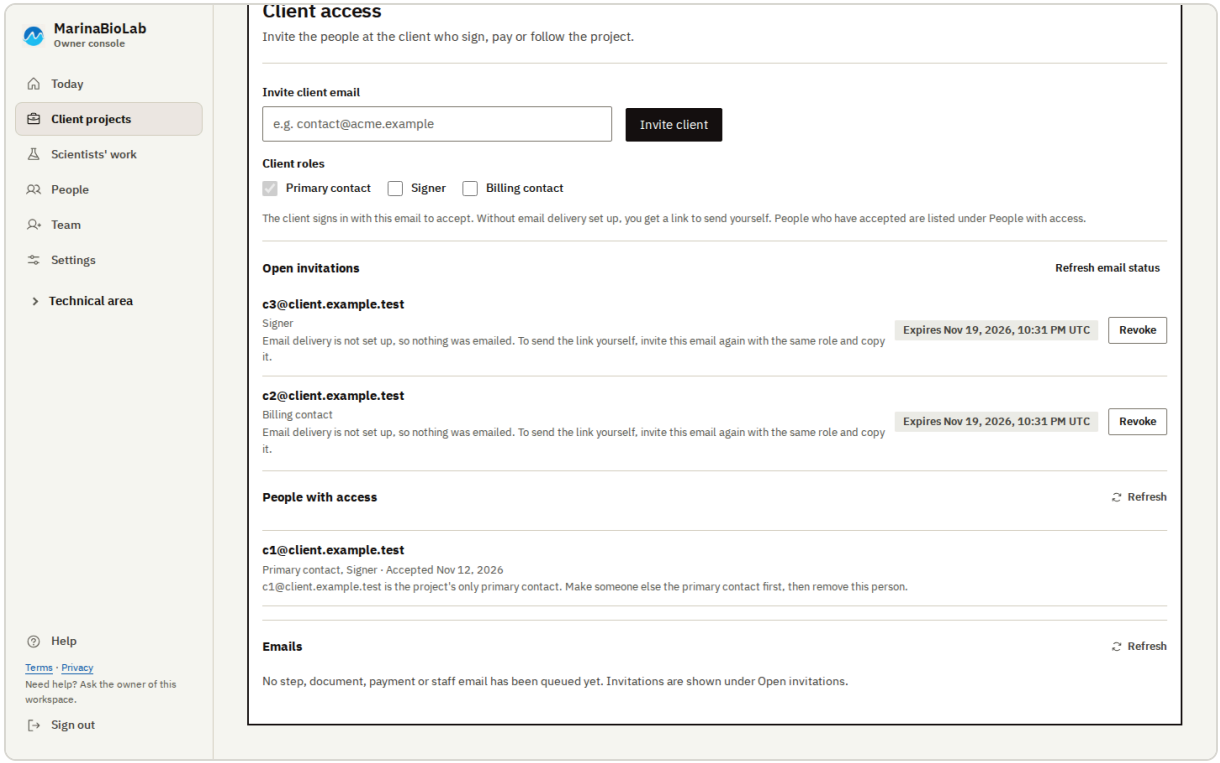
You check that the console shows that the client accepted.

WHERE Browser A. P1. Open **Choose a step or project details**, then **Client access**.

DO Reload the page. If C1 is still missing, select **Refresh** beside **People with access**.

YOU SEE Under **People with access**, C1 is listed with Primary contact, Signer and Accepted with today's date. C1's row is gone from **Open invitations**.

STUCK? The console does not update this page by itself. Reload it once more before you tick Fail.



B-06 C1 under People with access.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-07 Test client C1 signs the proposal

Portal

The client's signature on the proposal is what starts the work.

WHERE Browser B. P1, Overview tab.

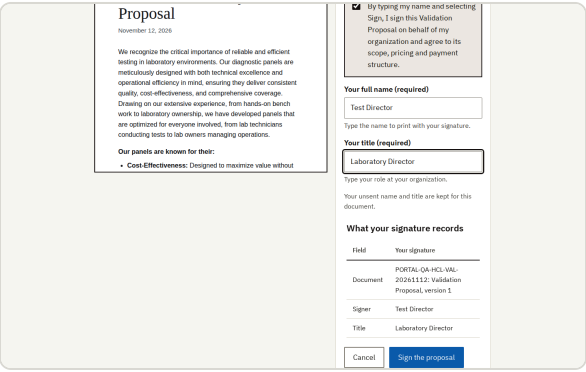
DO Select **Review and sign**. Read the document.

DO Under **Sign electronically**, check both boxes. Type the name and title from the test data sheet.

DO Select **Sign the proposal**.

YOU SEE As you type, the table **What your signature records** fills in. After you sign, the page says **Your signature is recorded.** A card headed **Signed** shows the name, the time and the sign-in email. **Download signed PDF** saves the signed copy.

STUCK? If nothing happens when you select **Sign the proposal**, check that both boxes are checked and that the name and title are filled in. If the page says it could not confirm whether your signature was recorded, wait for it to load the document again. If the empty form shows again after you sign, do not sign again. The Signed card can take a few seconds. Reload the page and look for the card. If the Signed card still does not show, tick Fail and tell the owner.



B-07a The form filled in, before Sign the proposal.



B-07b The Signed card.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

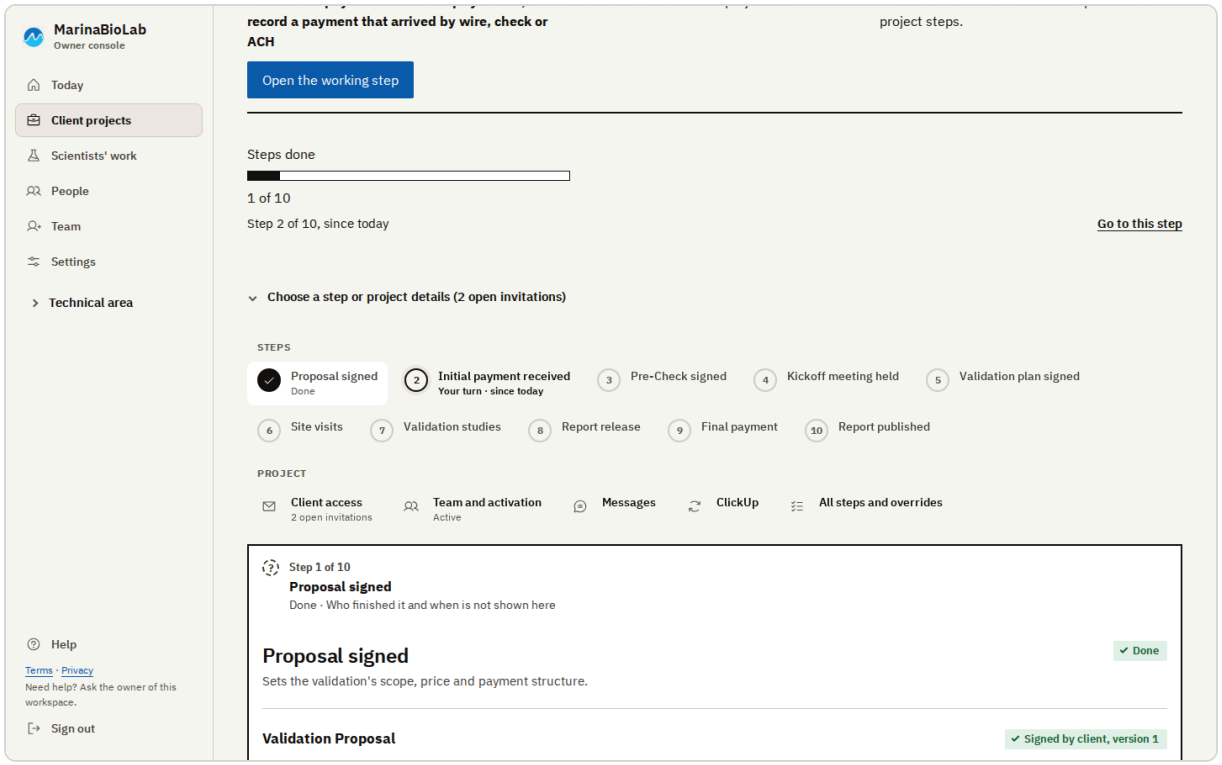
B-08 **Admin** The signature is on record **Console**

The console should show the signature the client just made.

WHERE Browser A. P1. Reload the page. Project step 1 is now a line under the earlier steps. Select that line to open it.

YOU SEE Project step 1 reads Done. The chip begins **Signed by client**. A block headed **Signed electronically in the client portal** gives the signer, their email and the time. The page also offers **Start change order**. You do not need it in this test. Project step 3 already has a first Pre-Check draft.

STUCK? Reload the page once and look again. If it still does not match, tick Fail, take a screenshot named after this step and go on to the next one.



B-08 Project step 1 after the client signed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

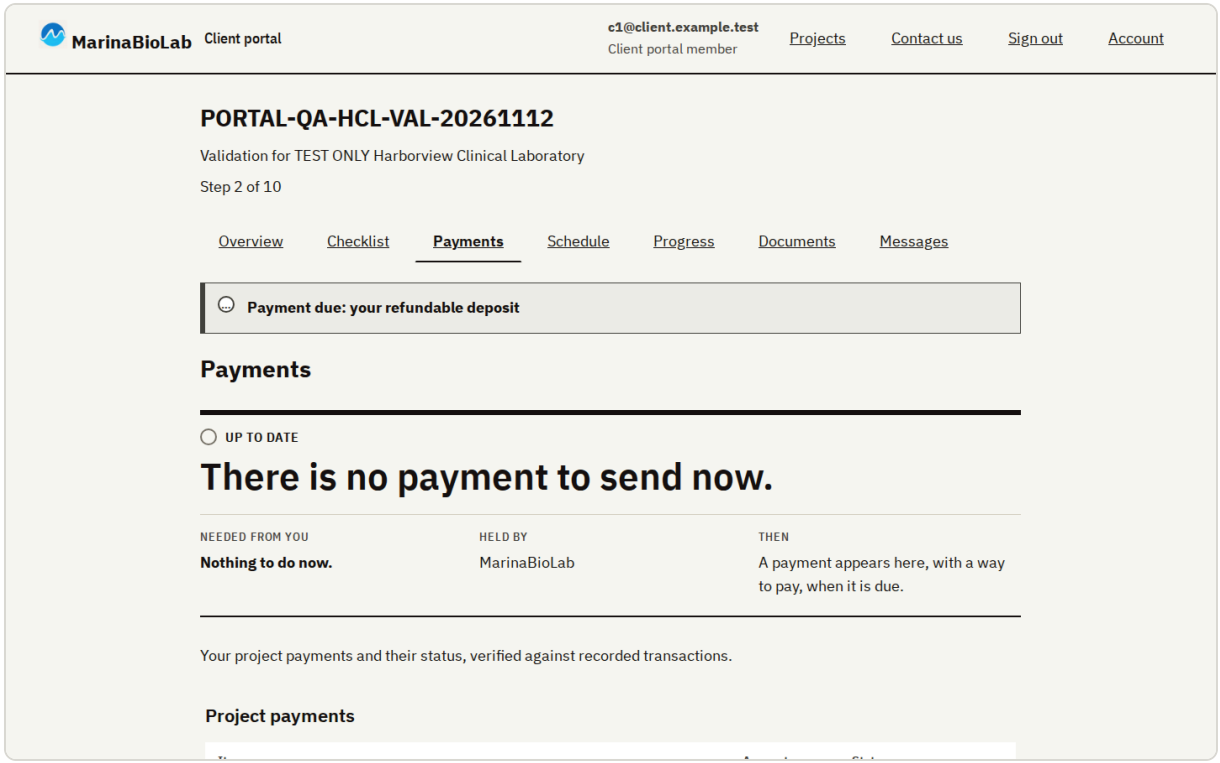
B-09 **Test client** The first payment, before you record it **Portal**

You check what the client sees for a payment that has no online checkout.

WHERE Browser B. P1, **Payments** tab.

YOU SEE The box at the top says whether anything is needed from you. Under it, the table **Project payments** lists the Refundable deposit at USD 500.00, marked **Being prepared**. That row has no **Pay on Shopify** button. Its note says that MarinaBioLab is preparing the payment and will tell the client how to pay. The Balance row reads **Not yet due**. The totals are in a second table, **Payment totals**.

STUCK? If there is no Payments tab, check that browser B is signed in as C1.



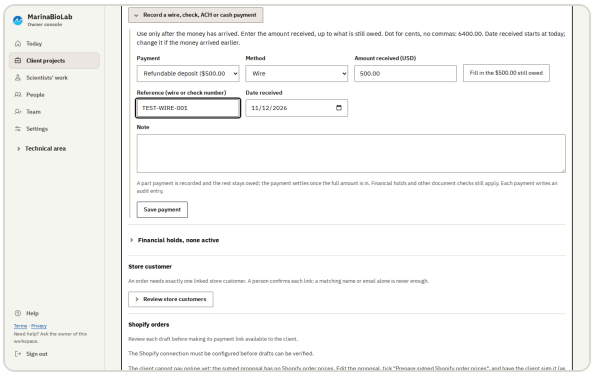
B-09 The Payments tab before any payment is recorded.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

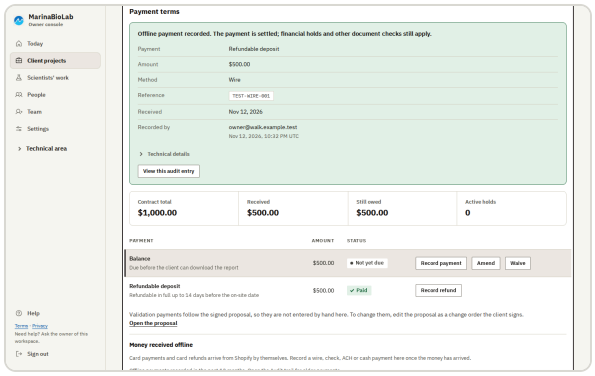
B-10 Admin Record the deposit as a wire payment Console

A real client would send the deposit by bank wire. You pretend it arrived and record it by hand. No money moves.

WHERE	Browser A. P1, project step 2 **Initial payment received**. The page is headed **Payment terms**.
DO	On the Refundable deposit row, select **Record payment**.
DO	In **Method**, choose Wire. It starts empty, on purpose.
DO	Select **Fill in the $500.00 still owed**. The button types 500.00 in **Amount received**.
DO	In **Reference (wire or check number)**, type TEST-WIRE-001. **Date received** already reads today.
DO	Select **Save payment**.
YOU SEE	The row reads Paid. Project step 2 reads Done. The page says **Offline payment recorded. The payment is settled; financial holds and other document checks still apply.** It also offers **View this audit entry**.
NOTE	The form then moves to the Balance, which is still owed. Leave it empty.
STUCK?	If there is no button that fills in the amount, type 500.00 in **Amount received**. If a box begins **Terms changed since you started: review before recording.** and offers **I have reviewed the changes**, read the changes. Select that button. Then save again.



B-10a The form filled in.



B-10b The receipt, and the row that now reads Paid.

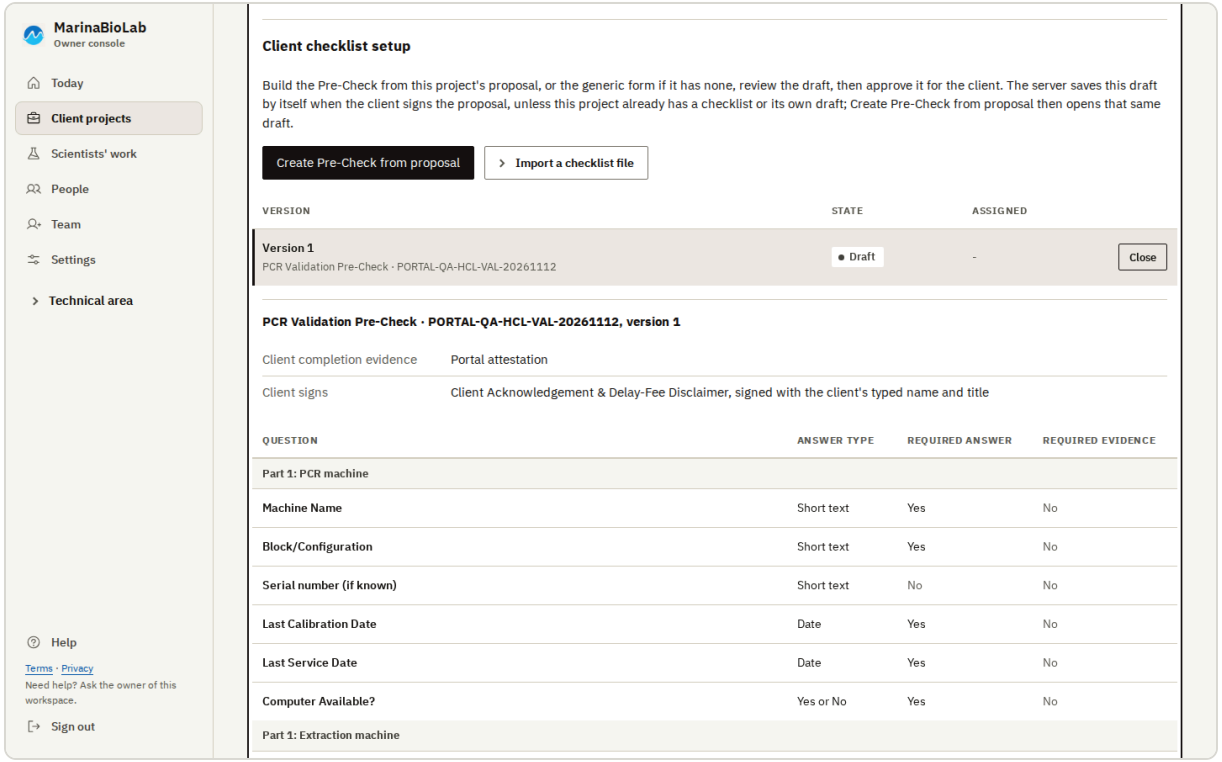
☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-11 Admin Approve the Pre-Check

Console

The Pre-Check is a list of questions the client answers before the lab work starts. The portal calls it the checklist. You approve it so the client can fill it in.

WHERE	P1, project step 3 **Pre-Check signed**, **Client checklist setup**.
DO	The draft that was saved when the client signed is already open under the table of versions. Read its questions.
DO	Check **I have reviewed these questions and evidence requirements and approve this exact checklist version for client use on this project.**
DO	Select **Approve, publish and assign**.
YOU SEE	The page says **Checklist approved and assigned to this project.** Project step 3 reads Waiting on client.
NOTE	If no draft is open, select **Create Pre-Check from proposal**. It opens the same draft.
STUCK?	Reload the page once and look again. If it still does not match, tick Fail, take a screenshot named after this step and go on to the next one.



B-11 Client checklist setup with the draft open, before the approval.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-12 Test client C1 fills in and signs the checklist

Portal

Now the client answers the Pre-Check questions and signs the answers.

WHERE Browser B. P1, Overview. Reload the page. Then select **Open the checklist**.

DO Answer every section. The list on the left has 9 entries: 8 sections, then Review and sign. Answer one Yes or No question with No, for example Computer Available? That gives B-13 something to follow up.

DO In the section about the PCR machine, type QuantStudio 5 in Machine Name. The proposal names a QuantStudio 5. With any other name, the questions that only a QuantStudio needs are not followed up.

DO Select **Save and continue** after each section.

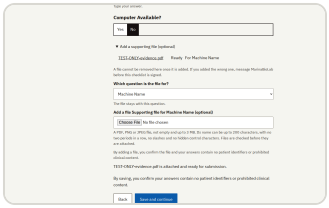
DO In one section, open **Add a supporting file (optional)**. In **Which question is the file for?**, choose a question. Select **Add a file**. Choose F2, the test PDF.

DO On **Review and sign**, check the box under **Client Acknowledgement & Delay-Fee Disclaimer**. Type the name and title from the test data sheet.

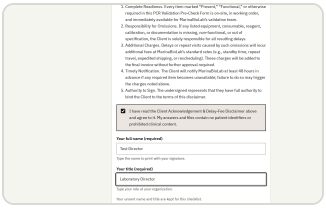
DO Check the box that starts **I agree to sign this document electronically**. Select **Sign and submit**.

YOU SEE After each section, the page says **Your answers are saved**. Once the file has been checked, it reads **ready for submission.** After you sign, a card that starts **Checklist signed on** appears. The message **Checklist signed and submitted. MarinaBioLab has your answers.** shows at the foot of the page for a few seconds.

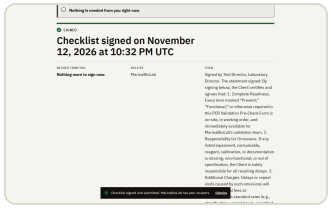
STUCK? If Overview still shows the payment step, reload the page. If the file does not reach ready for submission, check that F2 is a PDF under 3 MB. If adding the file gives this message: **The portal is temporarily unavailable. Try again shortly.** Try once more. If it fails again, go on without the file and write that in the note line. The file is optional.



B-12a The foot of a section: Computer Available? answered No, and a file added.



B-12b Review and sign, filled in.



B-12c After Sign and submit.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-13 Admin Read the answers and decide the follow-up

Console

Each No answer makes a follow-up for the lab to decide. You record a decision on it.

WHERE Browser A. P1, project step 3. Select **Refresh** at the top right of the step.

DO Open **Client checklist responses**. Read the counts and the Client attestation block.

DO Open **Pre-Check follow-ups**. Tick the row of the item answered No. A form headed Decide 1 ticked item at once opens.

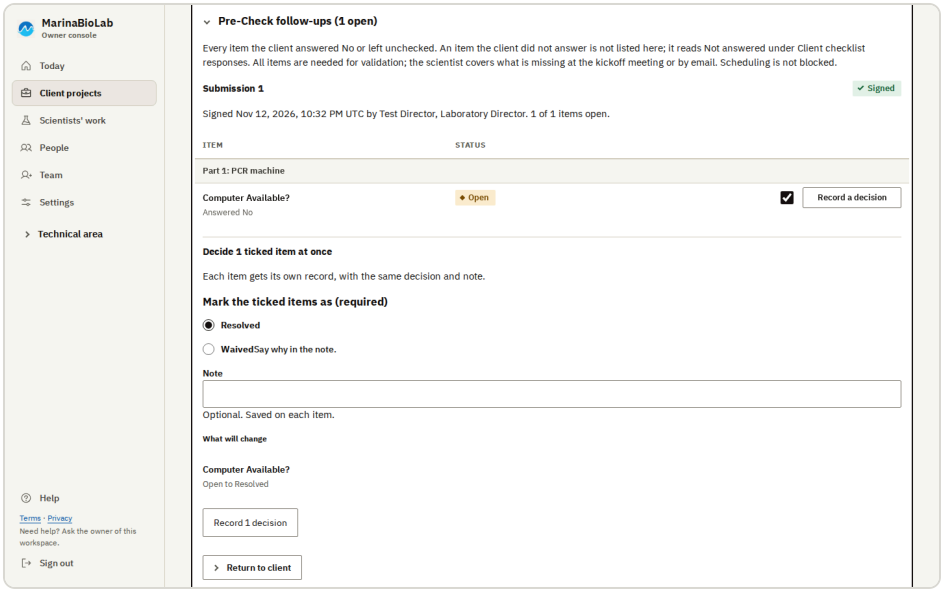
DO Under **Mark the ticked items as**, choose **Resolved**. Read the list **What will change**. Select **Record 1 decision**.

YOU SEE The responses show counts for Answered, Answered No, Not checked, Open follow-ups and Files. The attestation names C1's signer, Test Director. After you record the decision, a line that begins Recorded 1 of 1 names the item. The item's chip reads Resolved.

NOTE You can tick several rows and decide them in one press. You can also decide one row with **Record a decision**.

NOTE Project step 3 reads Done as soon as the client has signed, before you decide the follow-up. An open follow-up does not hold the project.

STUCK? If the counts are old, or a line says the client has not submitted a checklist yet, select **Refresh** again. If you see this message: **Read only: this account can view the follow-ups but cannot record decisions.** You are not on P1's staff. Add yourself under **Team and activation**, as in A-09. Then select **Refresh**.



B-13 The ticked row with its form, before Record 1 decision.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-14 Admin Book the kickoff meeting Console

The kickoff meeting is the first call between the scientist and the client. You save it in the console without sending a real invitation.

WHERE P1, project step 4 **Kickoff meeting held**.

DO Open **Book a scientist meeting**. **Meeting purpose** already reads Kickoff meeting. Type TEST ONLY in front, so that it reads TEST ONLY Kickoff meeting. Keep the word Kickoff, because the console finds the kickoff meeting by that word. **Meeting location** already reads Microsoft Teams.

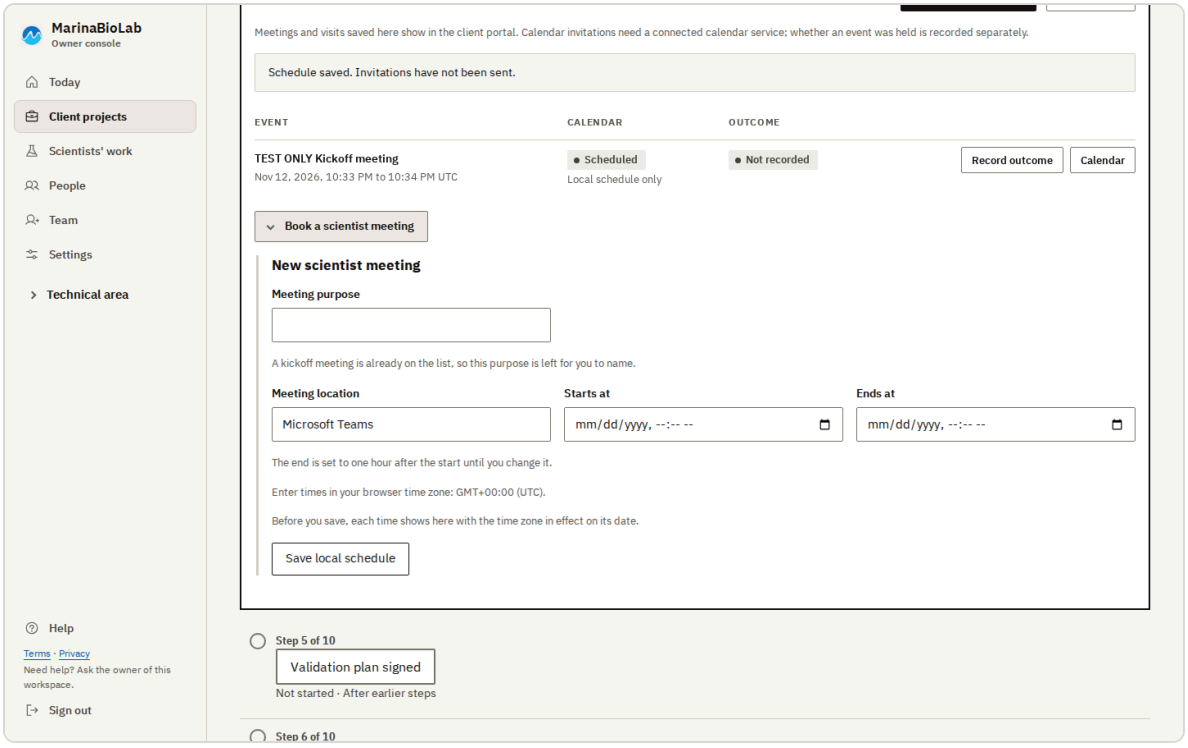
DO In **Starts at**, choose a time 5 minutes from now. **Ends at** moves to one hour after the start. Change it to 10 minutes from now.

DO Select **Save local schedule**. Do not select **Calendar**. It sends a real calendar invitation.

YOU SEE The meeting shows in the table with the outcome **Not recorded**. The page says **Schedule saved. Invitations have not been sent.**

NOTE The console also accepts a meeting that has already ended. Do not book one here. The portal would show it as past, and B-15 would not match.

STUCK? If you cannot book the meeting, check that you added yourself as Operations administrator in A-09.



B-14 The saved meeting in the table, with the booking form below.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

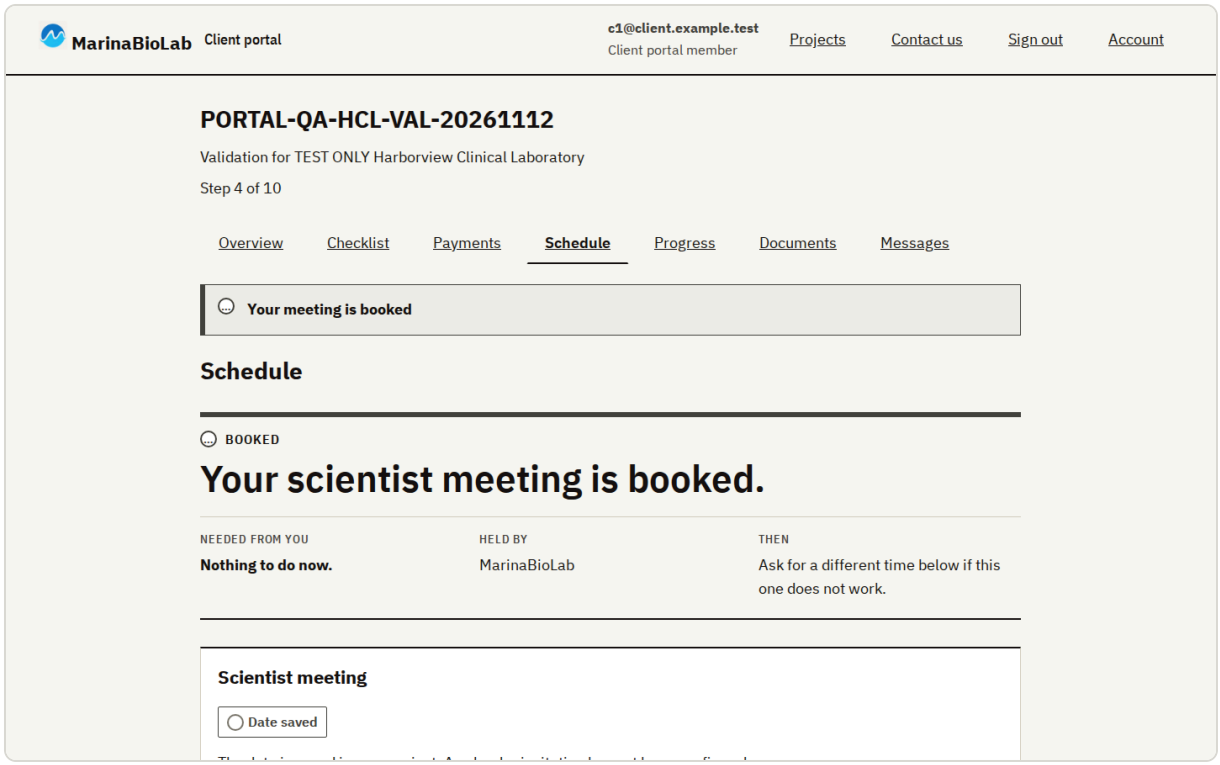
B-15 **Test client** The meeting shows on Schedule **Portal**

The client should see the meeting you just saved.

WHERE Browser B. P1, **Schedule** tab. Reload the page.

YOU SEE The card **Scientist meeting** reads **Date saved**. It shows Purpose, Date, Time and Time zone, with **Add to calendar** and **Ask for a different time**. There is no **Join Teams meeting** button, because no calendar link is confirmed. The card **On-site visit** reads **Not yet available**.

STUCK? Reload the page. If the meeting is still missing, check in browser A that B-14 saved it. If the card says the date has passed and has no **Add to calendar**, the meeting had already ended when you looked. Make a note of that and go on.



B-15 A meeting saved without a calendar invitation.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-16 **Admin** Record the meeting as held **Console**

After the meeting, the lab records that it happened. That closes project step 4.

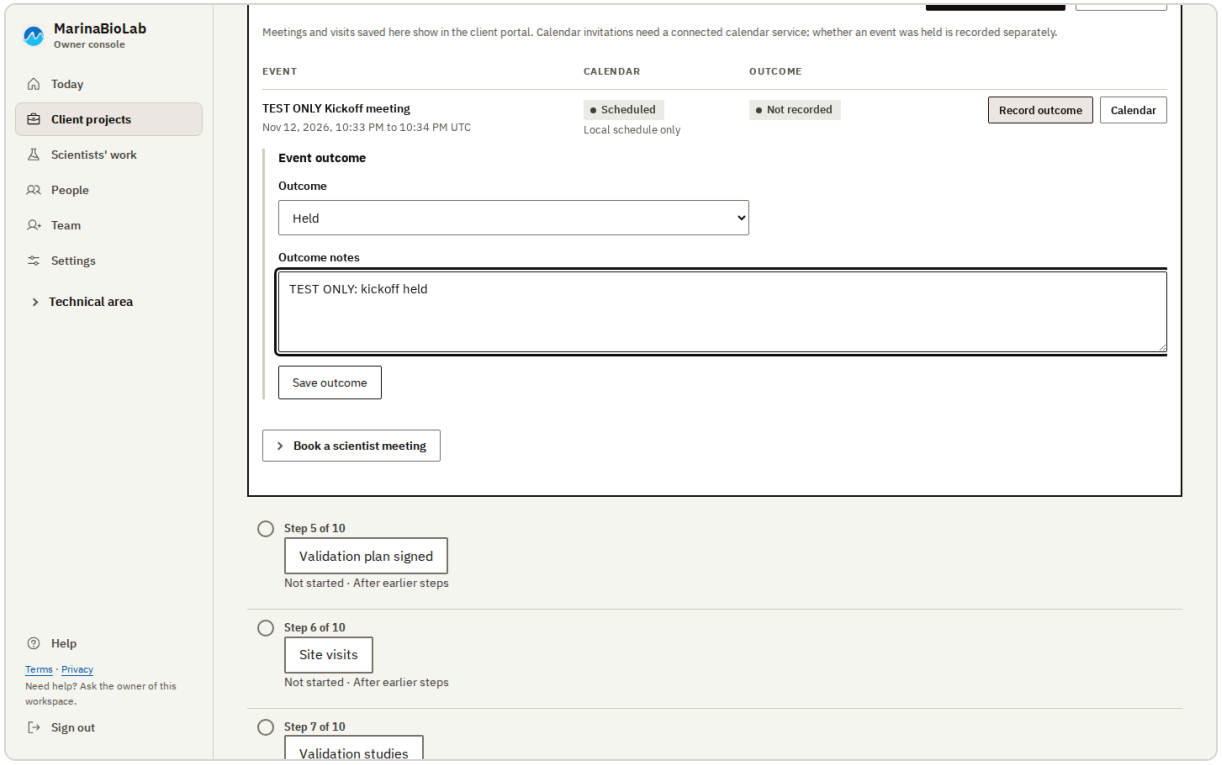
WHERE Browser A. P1, project step 4. Wait until the meeting's end time has passed. Then reload the page.

DO On the meeting's row, select **Record outcome**. In **Outcome**, choose Held.

DO Write a short note in **Outcome notes**. Select **Save outcome**.

YOU SEE Project step 4 reads Done, and the page says **Outcome recorded.**

STUCK? Held is grayed out until the end time has passed. Wait, then reload the page. If the save is refused with a message that begins This meeting has not ended yet, the server does not count the meeting as ended yet. Wait a minute, reload the page and try again. The message's last sentence, Check what you entered and try again, does not apply here.



B-16 The outcome form on the meeting's row.

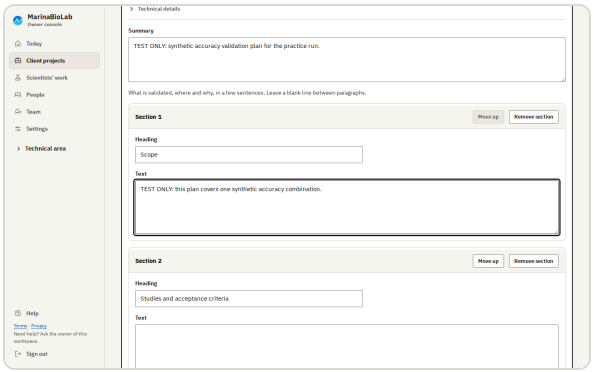
☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-17 Admin Write the validation plan

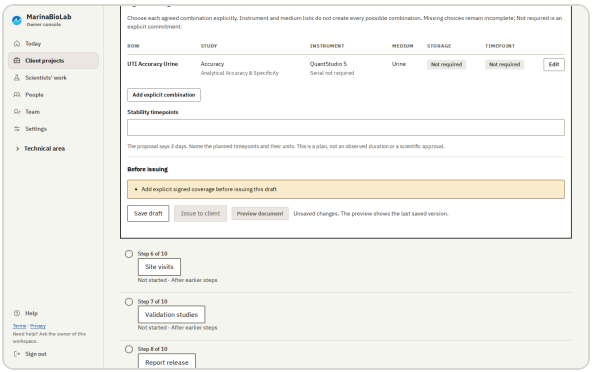
Console

The validation plan says exactly which tests the lab will run. This plan has one test: the one the run files can deliver.

WHERE	P1, project step 5 **Validation plan signed**.
DO	Write a **Summary** that starts with TEST ONLY. The form already has six sections with headings. Type one TEST ONLY sentence in the **Text** of Section 1. Leave the other sections empty.
DO	Select **Add explicit combination**. A combination is one set of conditions the lab will test.
DO	In **Study named in the proposal**, choose Analytical Accuracy & Specificity. In **Study (chosen interpretation)**, choose Accuracy.
DO	Set **Instrument model** to **Exact value**. Type QuantStudio 5 in **Value**. Set **Medium** to **Exact value**. Type Urine as its value.
DO	Set **Instrument serial**, **Storage** and **Timepoint** each to **Not required**. Select **Done**.
YOU SEE	The table **Signed coverage combinations** has one row, with Accuracy, QuantStudio 5 and Urine. No cell reads **Incomplete**.
NOTE	The **Row ID** fills itself in while you fill the row. After you select **Done**, it reads UTI Accuracy Urine. Write it down. You need it in B-23d.
STUCK?	If a cell reads **Incomplete**, select **Edit** on the row and set that field.



B-17a The summary and Section 1, filled in.



B-17b The finished combination.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-17a Admin Issue the validation plan Console

Issuing sends the plan to the portal. There the client reads and signs it, as they did with the proposal.

WHERE The same form, below the combinations.

DO In **Stability timepoints**, type the text between the quotation marks: "Synthetic accuracy-only fixture: no stability study is planned, so no stability timepoints are chosen for the proposal's 3-day duration."

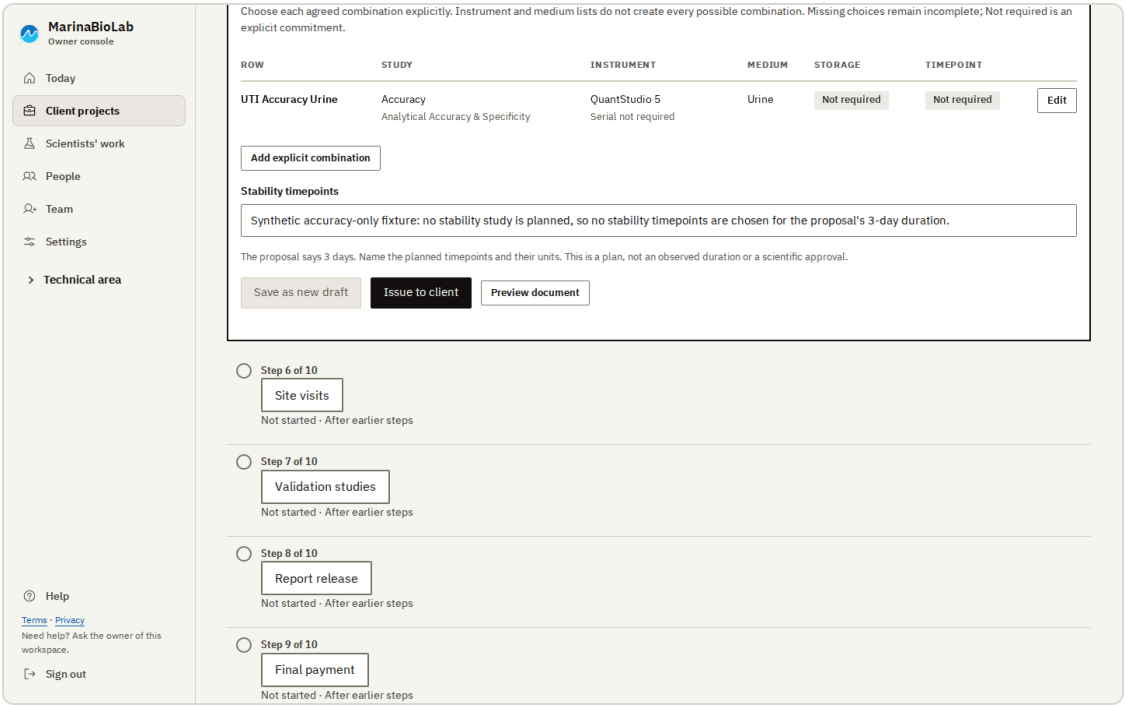
DO Select **Save draft**.

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

YOU SEE After you save the draft, the page says **Draft saved. Preview it, then issue it to the client.** After you confirm, it says **Issued. The client can now read and sign the plan in the portal.**

NOTE Project step 8 closes only when every combination of the signed plan is delivered in a published report. That is why this plan has one combination.

STUCK? The list **Before issuing** may still ask for signed coverage until you save the draft. If it names a problem after the save, fix what it names and save again. If you cannot, stop before you issue the plan and tell the owner.



B-17a The stability note typed and the draft saved.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-18 **Test client** C1 signs the validation plan **Portal**

The client signs the plan the same way they signed the proposal.

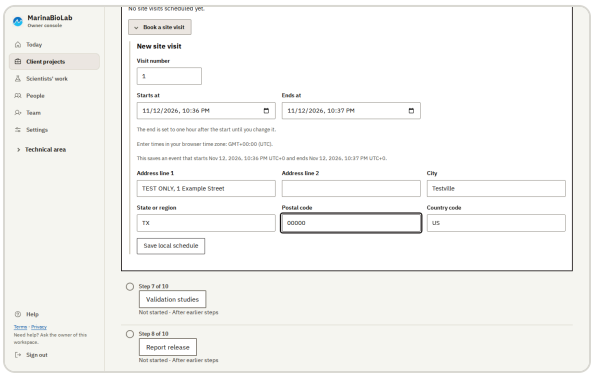
WHERE	Browser B. P1, Overview. Reload the page. Then select **Review and sign**.
DO	Read the plan. Under **Sign electronically**, check both boxes. Type the name and the title, as in B-07.
DO	Select **Sign the plan**.
YOU SEE	The page still shows the plan, now with a green card headed **Signed**. The card shows Validation Plan, version 1, the name and the time. Then reload browser A. There, project step 5 reads Done, and the plan's chip begins **Signed by client**.
NOTE	Overview then says that nothing is needed from the client right now. The site visit is the lab's turn (B-19).
STUCK?	Reload Overview. If **Review and sign** is missing, check in browser A that B-17a issued the plan.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

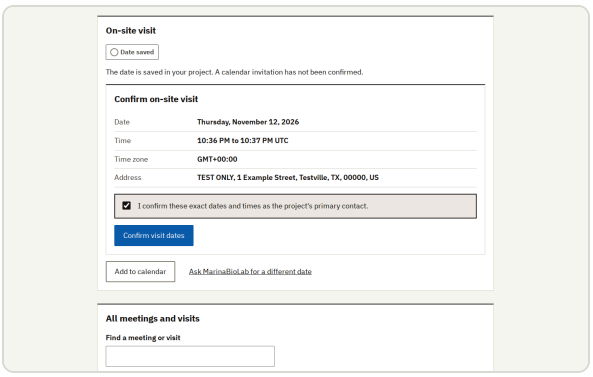
B-19 Admin + test client Book the site visit, confirm it, record it Console

In a site visit a scientist goes to the client's lab. You book it, the client confirms the dates, and afterward you record that it happened.

WHERE	Browser A. P1, project step 6 **Site visits**.
DO	Open **Book a site visit**. Leave **Visit number** as it is. In **Starts at**, choose a start 5 minutes from now. In **Ends at**, choose an end 10 minutes from now.
DO	Type the test address from the test data sheet. Its first line goes in **Address line 1**. The rest goes in **City**, **State or region** and **Postal code**. Select **Save local schedule**.
YOU SEE	The visit shows in the table, and the page says **Schedule saved. Invitations have not been sent.**
DO	Portal Switch to browser B, where you are signed in as C1. Reload Overview. Select **Review the dates**. Check the box **I confirm these exact dates and times as the project's primary contact.** Select **Confirm visit dates**.
YOU SEE	Portal The row **Dates confirmed** shows **By the primary contact**. The message **Your visit dates are confirmed.** may show for a few seconds.
DO	Go back to browser A. Wait until the visit's end time has passed. Then reload the page. Select **Record outcome**. In the list Outcome, choose Completed. Write a note in the box Outcome notes. Select **Save outcome**.
YOU SEE	The page says **Outcome recorded.** The outcome reads Held, and project step 6 reads Done.
STUCK?	The form does not save without a city. If the outcome will not save, the visit has not ended yet. Wait, then reload the page. If you see this message: **The project is not active. Activate it under Team and activation first.** Go back to B-04.



B-19a The booking form with the test address.



B-19b The client's confirmation, with the box checked.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-20 Scientist The scientist signs in and finds P1 Workbench

From here to B-26 you work in the workbench as the Scientist. If a colleague does the Scientist steps instead, hand them these pages, B-20 to B-26.

WHERE Browser S. The workbench at https://www.mblvalidation.com.

DO If the page **Sign in to qPCR Workbench** shows, sign in with your Scientist address and the emailed code or link, as in A-08. If browser S is still signed in from A-08, Home opens at once.

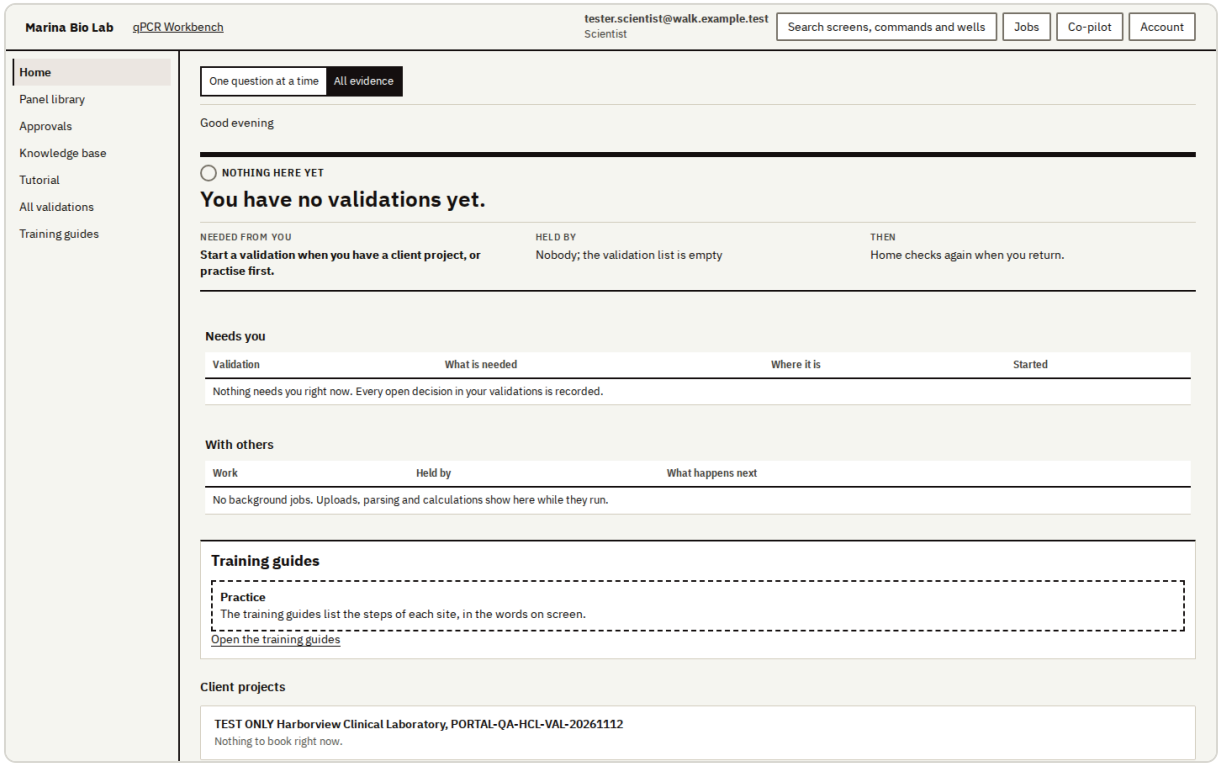
DO On Home, find P1 under Client projects.

YOU SEE Home lists P1, because your Scientist address is P1's validation scientist.

NOTE In B-21b to B-24b you type made-up texts. They are the texts the platform's own automated test saves. The file workbench-texts.txt, beside the run files, holds them ready to copy.

NOTE Messages in the workbench show in a black strip at the foot of the page. Most go away by themselves. Some stay until you select the cross on the strip.

STUCK? If the workbench says this: **You are not assigned to this project. Ask your lab owner or an admin to add you to its team.** Go back to A-09 and add your Scientist address as Validation scientist.



B-20 Home in the workbench, as the new Scientist account sees it.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-21 Scientist Start the validation, with its run files Workbench

A validation holds the scientist's work for P1: the run files, the results and the report. You give it its run files as you create it.

WHERE The workbench, Home.

DO Select **New validation**. Under **Client project**, select P1's card.

DO Leave **Panel** as it is. It shows P1's panel, the Urinary Tract Infections Panel PCR Kit.

DO Under **Studies**, only Accuracy must stay checked. After you choose P1, Accuracy, Negative accuracy and Controls are checked. Clear Negative accuracy and Controls.

DO Under **Instrument files (optional)**, choose the three F1 files together: x2-synthetic-accuracy-0.csv, x2-synthetic-accuracy-1.csv and x2-synthetic-accuracy-2.csv. Nothing is sent yet.

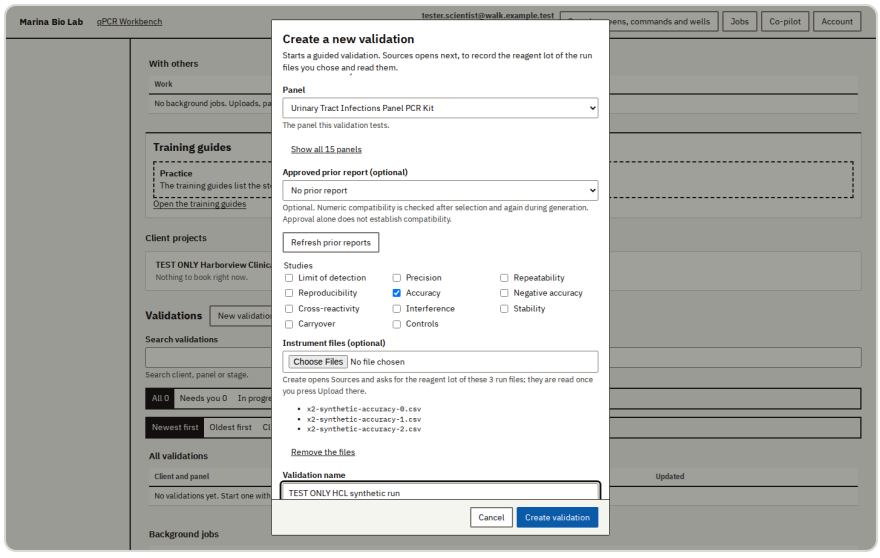
DO If the window shows a box that begins Offer the plan answers of, the box starts checked. Clear it. This test types its own plan answers.

DO In **Validation name**, type the name from the test data sheet. Select **Create validation**.

YOU SEE The new validation opens on **Sources**. The window **Record the reagent lot** opens for the three files. A message begins with these words: Validation created. Record the reagent lot. Go on with B-21a.

NOTE The menu on the left has 5 steps, from Plan to Report. Plate map and Results are one step, **Plate and results**. A step that needs you shows a mark and a number.

STUCK? If P1 is not in the window **Create a new validation**, check B-02 and B-04 in the console, then open the window again. If the window has no **Instrument files (optional)**, create the validation without files. It opens on Plan. You add the files in B-21a.



B-21 The window filled in, with the three files chosen, before Create validation.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-21a Scientist Record the reagent lot and upload the files Workbench

A run file holds an instrument's results. These three are made up. They are the exact files the platform's own automated test uploads.

WHERE **Sources**, the window **Record the reagent lot**.

DO Select **Lot unknown**. If the window offers a lot from another validation, do not choose it. The window marks it as a lot from another validation, and this test records no lot.

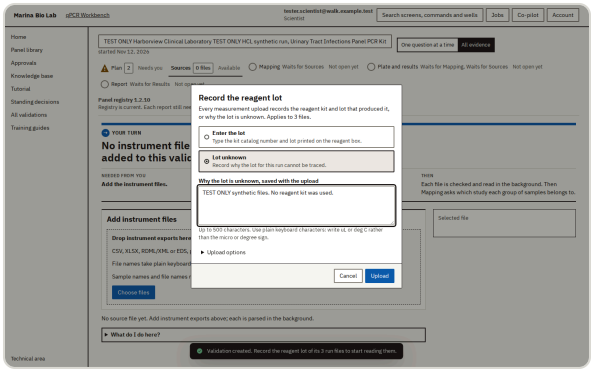
DO In **Why the lot is unknown, saved with the upload**, type both of these sentences: TEST ONLY synthetic files. No reagent kit was used.

DO Select **Upload**.

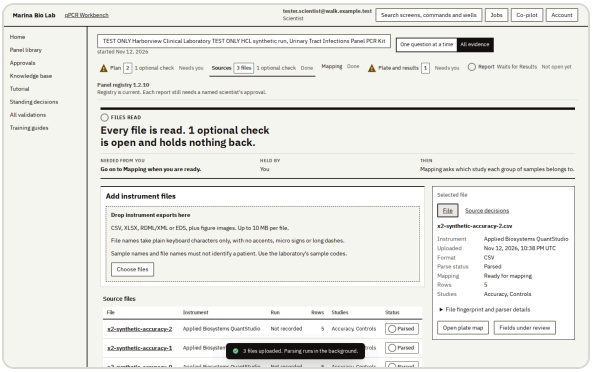
YOU SEE A message that ends with **uploaded. Parsing runs in the background.** Parsing means the workbench is reading the files. After a short wait each file's status reads Parsed.

NOTE The page then says that every file is read and 1 optional check is open. A card named Instrument settings reads Optional check. Leave that card as it is. Do not choose anything on it.

STUCK? If the window did not open, select **Choose files** on Sources. Choose the three F1 files together. Then start again at the first Do line of this step. If you leave Sources before the files are sent, the workbench drops them and says so. Choose them again. If a status has not reached Parsed after a few minutes, reload the page. Never rename or edit the files, and never upload any other file in their place.



B-21aa Record the reagent lot, with Lot unknown chosen and the reason typed.



B-21ab Sources after the upload.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-21b Scientist Record the reference organism Workbench

The report has a table of reference organisms. The table prints what Report settings hold, so you save one made-up row before any result exists.

WHERE **Report**, in the validation you just created.

DO Select **Report settings and figures**.

DO Under **Reference Organisms**, select **Add organism**. A row of boxes appears. Each box is named by the gray word inside it.

DO Type E. coli in the box Organism. Type SYNTHETIC-REFERENCE-LOT in Lot. Type ATCC in Provider. Type Yes in **Identity confirmed (note)**.

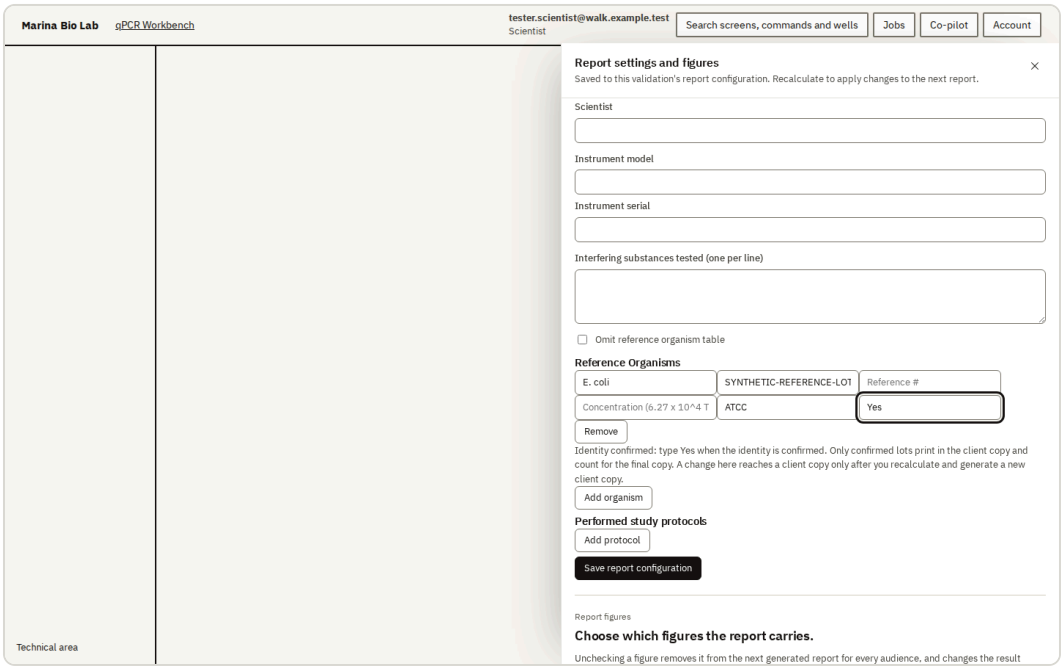
DO Leave the boxes Reference # and Concentration empty. Select **Save report configuration**.

YOU SEE The word **Saved** shows beside the button.

NOTE These four values are the ones the platform's own automated test saves. They describe no real material.

NOTE Report settings may list values under **Proposed from what this validation already holds**, each with Use. Do not select Use on any of them. This test saves only the row above.

STUCK? If Report has no **Report settings and figures**, reload the page. If it is still missing, tick Fail and tell the owner. B-24c needs this row.



B-21b The organism row filled in, before Save report configuration.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-22 **Scientist** Plan inputs: type the six answers, record them together **Workbench**

The workbench does not calculate until the plan says which targets a study covers and which results are expected. You type the six answers the platform's own automated test saves, and record them in one press.

WHERE **Plan**, the form **Plan inputs to record**.

DO The lines below name a box and then give its text. In each box, type the text between the quotation marks. Include the period at the end. Leave out the quotation marks.

DO Under Target scope by study, in the box Target inclusion by study, type: "Synthetic accuracy includes E coli only."

DO In the box Target exclusions by study, type: "All panel targets other than E coli are outside this synthetic accuracy fixture."

DO In the box Control targets in scope, type: "There is no separate control target. UTI NTC sample labels identify the synthetic E coli negative observations."

DO Under Accuracy expected-result map, in the box Expected positive labels, type: "Every synthetic sample label beginning UTI PC or Route identity specimen is expected positive for E coli."

DO In the box Expected negative labels, type: "Every synthetic sample label beginning UTI NTC is expected negative for E coli."

DO In the box Target or pool mapping, type: "Every observation in the existing synthetic accuracy recipe targets E coli; there are no mixed-target pools."

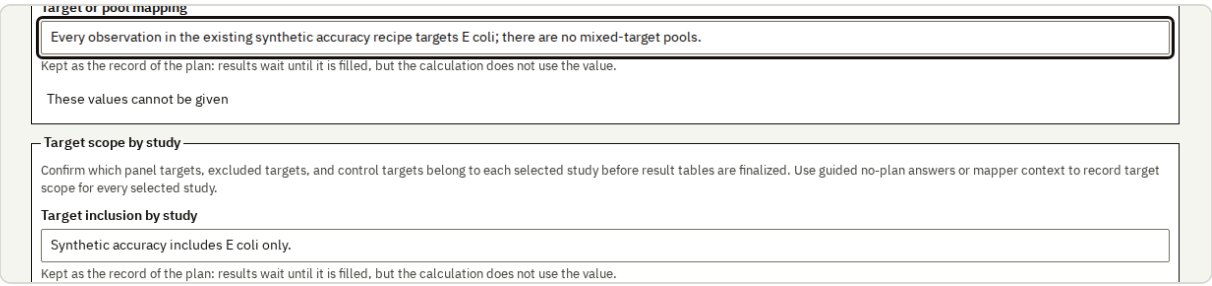
DO Leave every other box of the form empty. If a box shows a proposal with Use, do not select Use. If the form offers a button that begins Use all, do not select it. Select **Record the plan inputs**.

YOU SEE A message begins **Plan inputs recorded in one new plan version.** It says that 2 inputs are complete. The message may add that other inputs still have an empty field. That is expected, because this test leaves them open.

NOTE The platform's own automated test answers these two inputs only. A card named Report scope may already show under **Plan decisions**. Leave it for B-23a.

NOTE Plan may also show a card **Review everything at once**, with a button that begins Review. Do not use it in this test. It records proposals for cards this test leaves open on purpose.

STUCK? If there is no form Plan inputs to record, open the cards Target scope by study and Accuracy expected-result map with **Decide**. Type the same texts there. Then select **Save to the plan**.



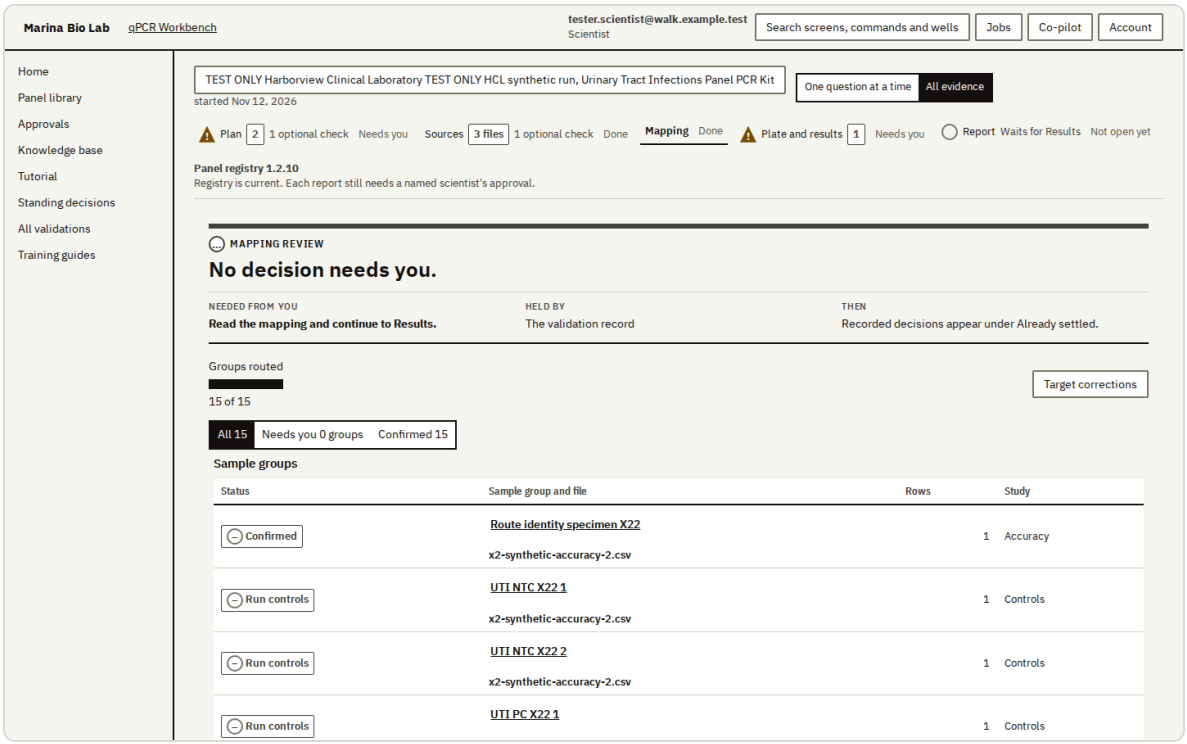
B-22 The boxes filled in, before Record the plan inputs.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-23 **Scientist** Look at the mapping **Workbench**

A plate has many small wells. Mapping tells the workbench which study each group of wells belongs to. These files name their own study, so you choose nothing.

WHERE	**Mapping**. The page is headed **Mapping review**.
DO	In **Reading view**, choose All evidence. The page opens on One question at a time.
DO	In **Filter sample groups**, choose Needs you. The page lists 0 groups.
DO	Then choose All. The page lists 15 groups, and every one reads Confirmed. Of these, 3 are Accuracy and 12 are Controls.
DO	Do not change the study of any group, and do not select **Change the study**. The platform's own automated test changes none.
YOU SEE	**Groups routed** reads 15 of 15. No group shows a proposed study, because these files name their own. Nothing on this page asks you to apply the mapping. B-23c does that.
NOTE	On other validations the workbench proposes a study for each group it can, with its basis and a tick, and records the ticked groups together. These files need none of it.
STUCK?	If a group reads Needs decision, do not guess. Take a screenshot, tick Fail and tell the owner.



B-23 Mapping in All evidence: 15 of 15 groups routed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-23a Scientist Confirm the report scope, first time Workbench

The workbench does not calculate until the scientist has said which studies this report covers. You record that now. You come back to this card in B-23d.

WHERE **Plan**, the card Report scope under **Plan decisions**. Select **Decide** if the card is closed.

DO Read the card. It says to calculate first and then choose Change report scope. You do that later, in B-23c and B-23d. In the table the Accuracy row reads Included. The row's note says the current evidence could not be read. That is expected before the first calculation.

DO Check the box **I reviewed the signed source, planned interpretation and current evidence gaps. This statement resolves none of them.**

DO Choose **Confirm this report scope**.

DO In **Scientific rationale (required)**, type: "Synthetic release evidence: accuracy and its observed PC/NTC controls were performed; all remaining studies are explicitly deferred and are not claimed as passing or not applicable."

DO Select **Record decision**.

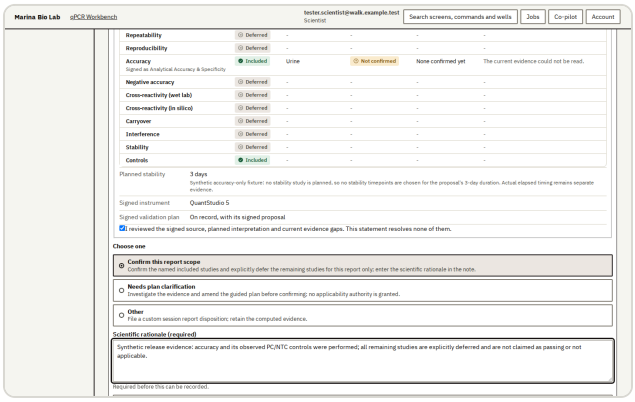
YOU SEE A message that ends **Recorded in the review ledger.** The card reads Confirmed.

NOTE This first card has no box that starts **Confirm from laboratory records:**. That box shows on a second card, after the first calculation (B-23d).

NOTE Another card, Extraction kit not recorded, reads Optional check. It holds nothing back. Leave it as it is.

NOTE Once no decision that holds results back is open, a card named **Equipment and kit record** shows under **Plan decisions** too. You record it in B-23b.

STUCK? If there is no Report scope card, wait a minute and reload Plan. If it is still missing, tick Fail and tell the owner. If the card says Confirm this report scope is not offered yet and names Controls, B-21 left Controls checked. Tick Fail, take a screenshot and tell the owner.



B-23a The first Report scope card, with the box checked and the rationale typed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-23b Scientist Record the equipment and kit record Workbench

The workbench keeps an internal record of the equipment and the kit lot behind each run. It asks for this record once the other decisions are recorded. If a line has nothing on record, you give one reason for it.

WHERE **Plan**, the card **Equipment and kit record** under **Plan decisions**. Select **Decide** if the card is closed.

DO Read the card. It lists the kit and lot of each file and the equipment lines. A line that reads Not provided has nothing on record.

DO If a line reads Not provided, the box **Reason for the lines that read Not provided** shows. Type in it: "Synthetic record: equipment dates and serials were not captured." If every line has a value, the card says so and shows no box. Then go on to the next Do line.

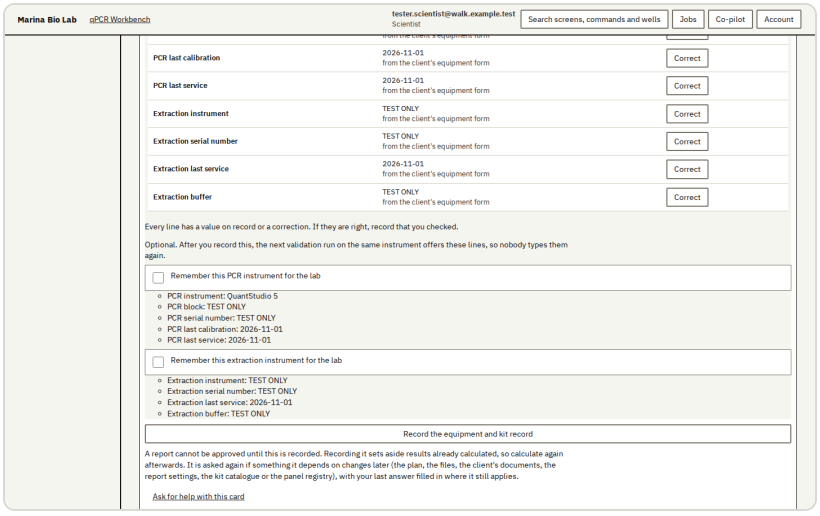
DO Select **Record the equipment and kit record**.

YOU SEE A message that ends **Recorded in the review ledger.** The card reads Confirmed.

NOTE The equipment lines show the TEST ONLY answers of the Pre-Check. Do not select **Correct** on any line. The button **Not on record for this validation** writes a reason of its own. Do not select it, because this test types the reason above instead. If the card offers **Use the instrument named in the export files**, do not select it. These files name no instrument.

NOTE Never check **Remember this PCR instrument for the lab**, or the same box for an extraction instrument. It saves a record for the whole lab.

STUCK? If the card is not there yet, a decision that holds results back is still open. Check that B-22 recorded both plan inputs, then reload Plan. If the card says the source must be reconciled, check in the console that the Pre-Check is signed (B-12), then tell the owner.



B-23b The Equipment and kit record. Every line has a value, so there is no reason box.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-23c Scientist Calculate for the first time Workbench

The plan row of B-17 can be confirmed only against calculated results. So you calculate once and accept that run, before you go back to the Report scope card.

WHERE **Plate and results**.

DO Select **Recalculate**. A message says the mapping was applied to 3 source files and that a calculation is queued. Wait until the results appear.

DO Select **Review and confirm**. If the form offers **Use this** beside the line that begins This run, select it. It fills in **Rationale** and **Evidence**. If the form does not offer it, choose Observation confirmed in **Rationale** and Result package manifest in **Evidence** yourself.

DO In **Scientific rationale**, type: "Reviewed the actual synthetic source observations and generated package."

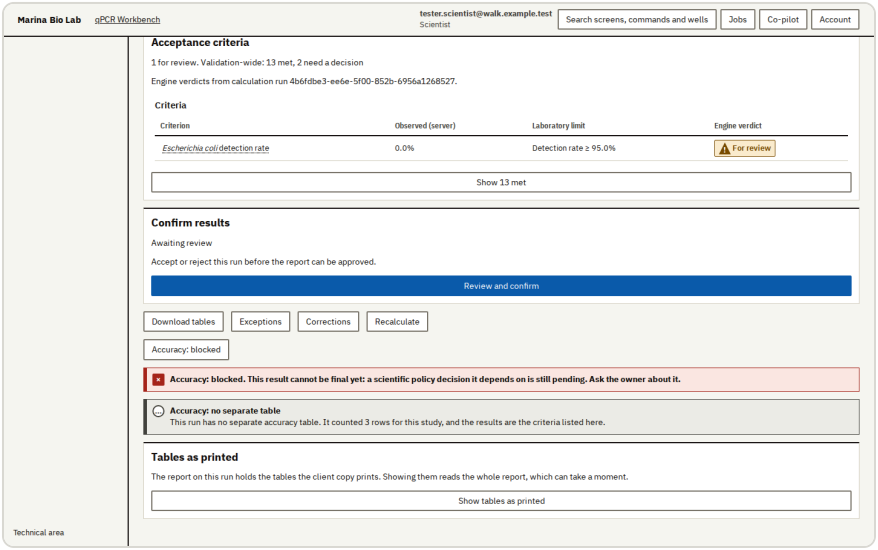
DO Select **Accept results**.

YOU SEE The bar **Confirm results** reads Accepted, 1 study still blocked, with your Scientist address and the time.

NOTE The tab reads Accuracy: blocked, with a red line about a scientific policy decision. That is expected in this test. The study waits on a lab-wide question that only the owner answers.

NOTE Never select **Record decision** on an item that starts Question for the lab. An answer there applies to every validation of the whole lab.

STUCK? If **Recalculate** cannot run, the page says why before you press it. Either a decision is still open, or the Equipment and kit record waits on Plan. Go back to B-22, B-23a or B-23b.



B-23c Plate and results after the first calculation.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-23d **Scientist** Confirm the plan row on a new Report scope card **Workbench**

The signed plan has a row that promises accuracy on a QuantStudio 5 in urine. The run files name no instrument, so you confirm that row from records. Without this, the plan row is never counted as delivered.

WHERE **Plan**, the card Report scope under **Plan decisions**. It reads Confirmed. Select **View** to open it.

DO Select **Change report scope**. In **Why the scope changes (required)**, type Reconfirm the synthetic scope. Select **Reopen report scope**.

YOU SEE The message **Report scope reopened. Confirm it on its new card, then recalculate.** A new Report scope card reads **Needs decision**. The old one is now listed as **Earlier report scope**.

DO On the new card, check the box that starts **Confirm from laboratory records:** and names your Row ID from B-17.

DO In **Laboratory record consulted for the study, instrument and medium**, type: "Synthetic fixture declaration: these generated accuracy rows represent QuantStudio 5 observations; the CSV deliberately omits the instrument model. This is not a real laboratory record."

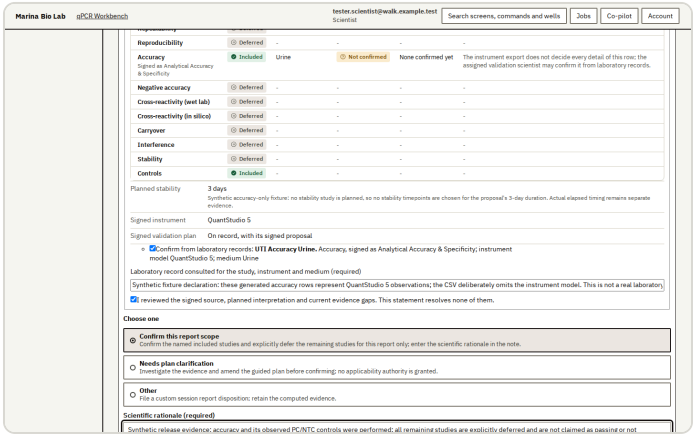
DO Finish this card as you did in B-23a. Check the review box. Choose **Confirm this report scope**. Type the same scientific rationale that you typed there.

DO Select **Record decision**.

YOU SEE A message that ends **Recorded in the review ledger.** The new card reads Confirmed.

NOTE If the **Equipment and kit record** reads Needs decision again, its last answer is already filled in. Select **Record the equipment and kit record** again.

STUCK? If the box cannot be checked, your Scientist address is not P1's validation scientist. Go back to A-09 and add it. If the new card has no such box at all, tick Fail, take a screenshot and tell the owner. B-27 cannot pass without this box.



B-23d The new Report scope card, with the box for the plan row checked and the record typed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-23e Scientist Ask for help on a card, and answer it Workbench

A scientist who is stuck can ask the lab's owners from the card itself. The question reaches the console's Today, and the answer comes back to the same card. No email is sent.

WHERE Browser S, as the Scientist. **Sources**, the card Instrument settings that you left open in B-21a.

DO Select **Ask for help with this card**. In **What do you need help with?**, type the help request from the test data sheet. Select **Send to the owner's console**.

YOU SEE Under the card, a line says the request was sent.

DO Console Switch to browser A and open **Today**. Under **What is stuck, and for how long**, find the item labeled Help request for your TEST ONLY validation. Do not select **Use a starter**. In **Your answer**, type the answer from the test data sheet. Select **Send answer**.

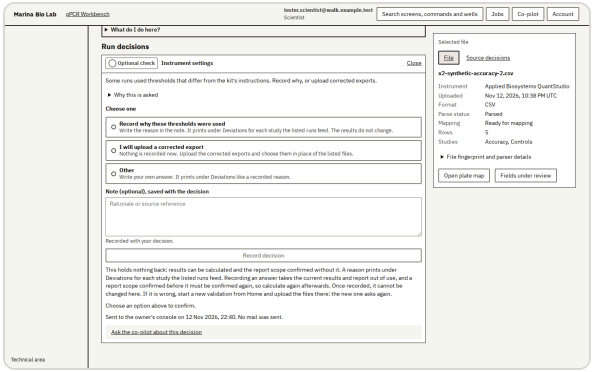
YOU SEE Console A line that begins **Answer recorded** and says the scientist sees it where they asked. No email was sent.

DO Back in browser S, reload Sources and find the card again.

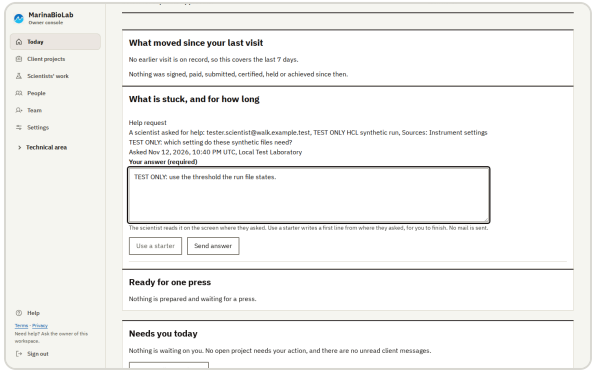
YOU SEE Under the card, your request, with the answer under it.

NOTE Today should list the request of this TEST ONLY validation. If your Today does not list it, write that in the note line and mark the step Not run.

STUCK? If the card has no **Ask for help with this card**, use **Ask for help** in the account menu (the round button with your initials) while the validation is open.



B-23ea The line under the card after Send to the owner's console.



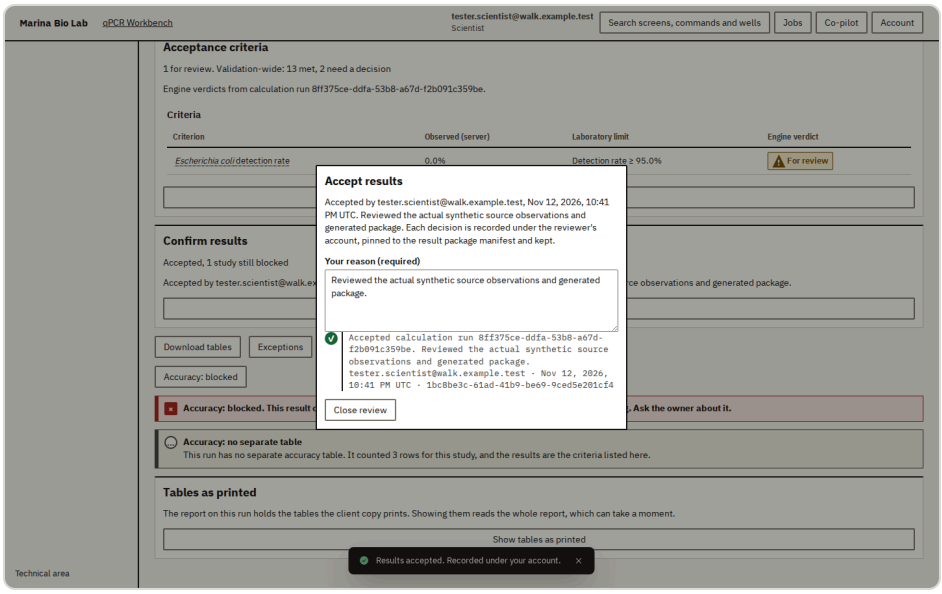
B-23eb Today: the TEST ONLY help request under What is stuck, and for how long, with the answer typed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-24 Scientist Recalculate and accept the results Workbench

The scope changed in B-23d, so the results are calculated again. The scientist reads the new run and accepts it. The workbench records who checked it and why.

WHERE	**Plate and results**.
DO	Select **Recalculate**. Wait until the new results appear.
DO	Read the Accuracy tab.
DO	Select **Review and confirm**. If the form offers **Use this rationale** under your rationale for the previous run, select it. Check that **Rationale** reads Observation confirmed, **Evidence** reads Result package manifest and **Scientific rationale** holds "Reviewed the actual synthetic source observations and generated package." Fill in what is missing.
DO	Select **Accept results**.
YOU SEE	The bar **Confirm results** reads Accepted, 1 study still blocked, with your Scientist address and the new time.
NOTE	This guide gives no expected numbers. The files are made up, and the platform's own automated test checks that the plan row is delivered, not what the values are.
CHECK FIRST	This is the second time you select Accept results in this test. The black strip at the foot of the page should show Results accepted only once. Write down whether it shows it twice.
STUCK?	If **Recalculate** cannot run and the page names a decision, B-23d is still open. Go back to it. If it names the mapping, tick Fail and tell the owner.



B-24 Plate and results after Accept results.

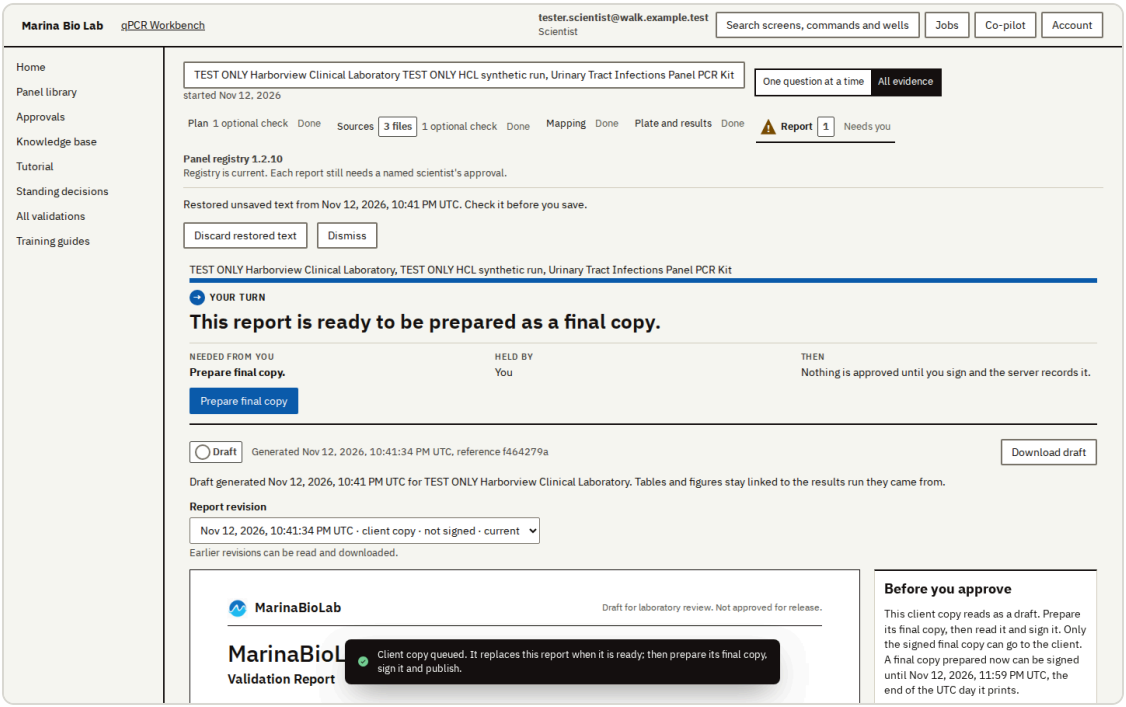
☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-24a Scientist Generate the client copy

Workbench

The report comes in versions. The scientist copy is for the lab. The client copy is the one a client may receive, and only it can become a final copy.

WHERE	**Report**.
DO	Wait until a report shows. If the page offers **Generate scientist copy**, select it and wait.
DO	Select **Generate client copy**. On a scientist copy it is the main button, in the box at the top of the report.
YOU SEE	**Client copy queued.** Queued means the workbench is making the file. In under a minute the client copy replaces the report on screen.
NOTE	**Approve this scientist copy**, in the card **Report audience**, approves the scientist copy for the lab's own record. This test does not use it.
NOTE	A card with the title LoD decision before a client copy may show. If it does, choose nothing on it. Tick Fail, take a screenshot and tell the owner. While that card is open, no client copy is made.
STUCK?	If the page says a job is still running, wait for it and try again. If you see this message: **This results run already made its client copy, so nothing new was queued.** Read the client copy that already exists.



B-24a Report with the client copy.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-24b **Scientist** Write the wording the final copy needs **Workbench**

A final copy is refused while the client copy would print nothing under a numbered section, or while a study has no results summary and no conclusion. You type made-up wording, as the platform's own automated test does.

WHERE **Report**, with the client copy on screen. Find the list under **Before you approve**.

DO The list names each section that would print nothing. Open **Evidence trace and wording**, near the foot of the report. Under Materials and Instrumentation, select **Edit wording**. The box is empty.

DO Type: "Synthetic test wording recorded by the fixture; it states no laboratory fact." Leave one blank line. Type the words Performed by and then your full name, on one line. Spell the name as you type it in B-24c. Leave one more blank line and type: "Analysis software QuantStudio Design and Analysis 2.6.0." Then select **Save wording**.

NOTE Without the Performed by line and the analysis software line, B-24c refuses to prepare the final copy and says so.

DO Do the same for each of these sections: Reagents Required; Validated Matrix and Collection; Assay Metrics. In each one, type the first sentence only, the one that begins Synthetic test wording. Save each one before you open the next.

DO On the row of the Accuracy study, select **Edit wording**. Keep the text that is there. Go to its end and leave one blank line.

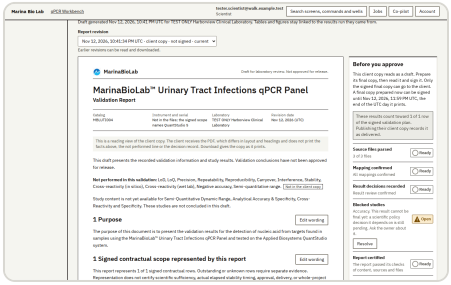
DO Type: "Results Summary: Synthetic test wording; no laboratory result." Leave one blank line. Type: "Conclusion: Synthetic test wording; no laboratory conclusion." Select **Save wording**.

YOU SEE Each save makes a new draft of the report, and the row you saved reads Ready. The sections then print with their numbers: 3, 4, 6, 7 and 8.1.

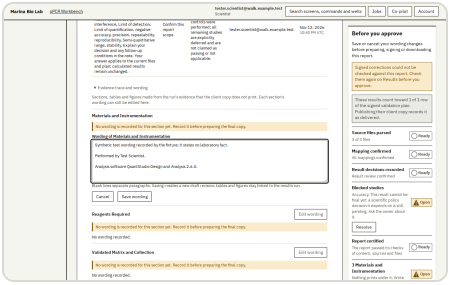
NOTE Section 5, Reference Organisms, has no wording to write. It prints the row you saved in B-21b.

NOTE Under **Evidence trace and wording**, each section that needs wording reads **No wording is recorded for this section yet. Record it before preparing the final copy.**

STUCK? If a row offers **Open Report settings** instead of **Edit wording**, a report fact is missing: B-21b was skipped. Do B-21b, then recalculate in B-24 and make a new client copy in B-24a.



B-24ba The list under Before you approve, before the wording is written.



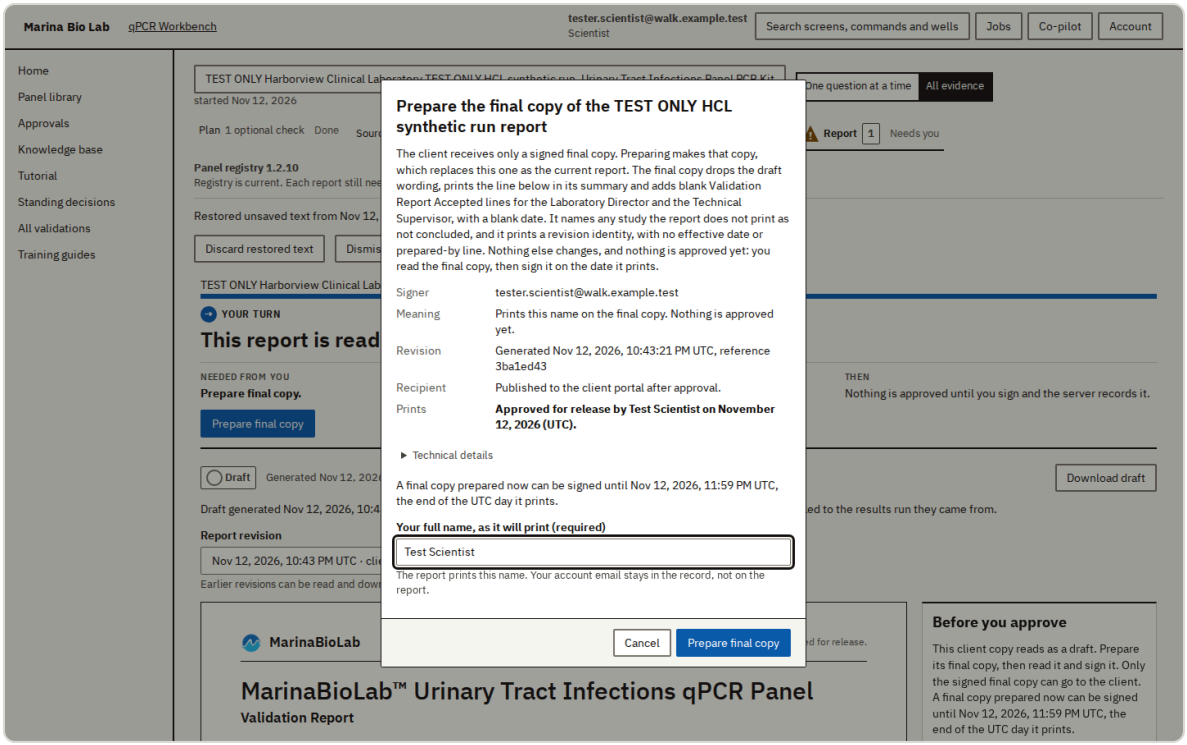
B-24bb Materials and Instrumentation open for editing, under Evidence trace and wording.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-24c Scientist Prepare the final copy and read it Workbench

The client receives only a signed final copy. Preparing makes that copy. Nothing is approved yet. Only a Scientist can prepare it.

WHERE	**Report**.
DO	Select **Prepare final copy**. A window opens. In **Your full name**, type your own full name.
DO	If the window lists things it found in the copy, read them. Then check **I have read this and want this copy prepared as it stands.** If the window shows no such box, go on.
DO	Select **Prepare final copy** in the window.
DO	When the final copy shows, select **Download draft** and choose **Word document**. Open the file and read it.
YOU SEE	**Final copy queued.** After a short wait, the final copy replaces the report on screen. The Word file carries the words DRAFT - NOT FOR CLIENT DISTRIBUTION.
STUCK?	If the window says in red that this final copy was not prepared, it names the sections or the study that would print nothing. Go back to B-24b and write those. If it names Reference Organisms, do B-21b, then recalculate in B-24 and make a new client copy in B-24a.



B-24c The Prepare final copy window, with the name typed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-25 **Scientist** Sign the final copy **Workbench**

Your signature approves the report. Only a Scientist can sign it.

WHERE **Report**.

NOTE Before you sign, you can do the extra check of E-08. In browser A, open the workbench signed in with your admin address, and open this Report. There should be no **Sign the final copy** button, and the page should say **Only a scientist can sign.** Select nothing. Write what you saw in the note line of E-08.

DO Select **Sign the final copy**.

DO The window lists what is still open, for example 2 optional checks and 1 blocked study. Check the box **I approve this revision with these items open. They stay open after approval.**

DO In **Type the name this copy prints**, type the same name as in B-24c, spelled the same way.

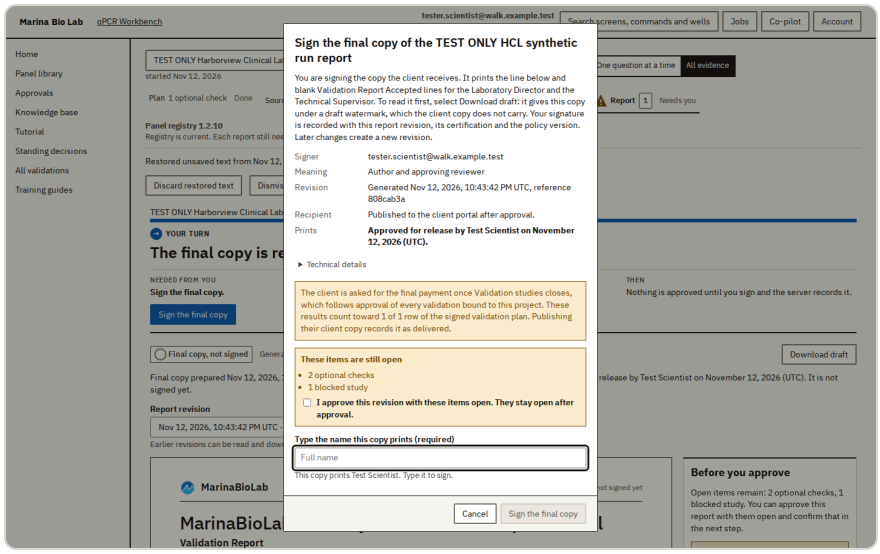
DO Select **Sign the final copy** in the window.

YOU SEE A message that begins Report approved and names you. The report is marked Approved, and the button **Publish to client portal** appears.

NOTE A new Scientist account has no name on record, so the report prints the name you type.

NOTE If P1's final-payment terms were not on record, the window would say that signing also asks the owner to record them. P1 has its terms from C1's signature, so the window does not say this.

STUCK? The button in the window stays gray until the box is checked and the name is typed. If you see this message: **Only a scientist can sign.** Browser S is signed in with your admin address. Sign out and sign in with your Scientist address.



B-25 The Sign the final copy window, before the box is checked.

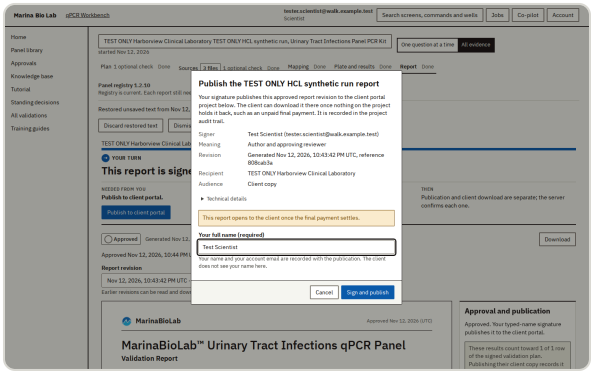
☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-26 Scientist Publish the report to the portal

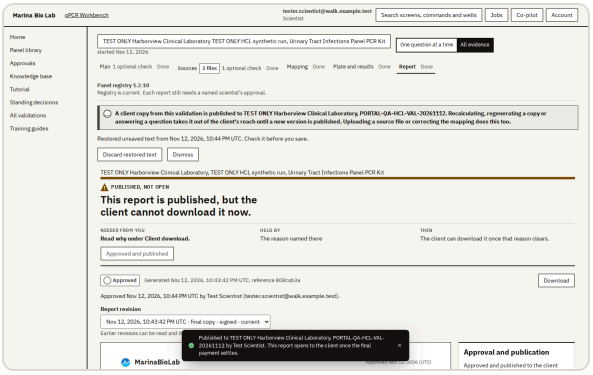
Workbench

Publishing puts the final report in the client's portal.

WHERE	**Report**.
DO	Select **Publish to client portal**.
DO	A bind window may open. Bind means link this validation to the client project. If the window opens, choose P1, type the reason and select **Bind to project**.
DO	Read the Recipient row. It must name P1's TEST ONLY client. Then type your own full name in **Your full name** and select **Sign and publish**.
YOU SEE	The box **Published to the client portal**. Because the final payment is still owed, it reads **Published, client download paused**, and says that the report opens to the client once the final payment settles.
NOTE	An admin can also publish, but only after the scientist has signed the final copy.
STUCK?	If the Recipient row names any other client, do not publish. Close the window and tell the owner. If the page says it waits for payment terms, check in browser A that project step 7 reads Done, and tell the owner if it does not.



B-26a The publish window, with the name typed.



B-26b Report after Sign and publish.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-27 **Admin** The report on project step 10 **Console**

Back in the console, you check that P1 shows the published report.

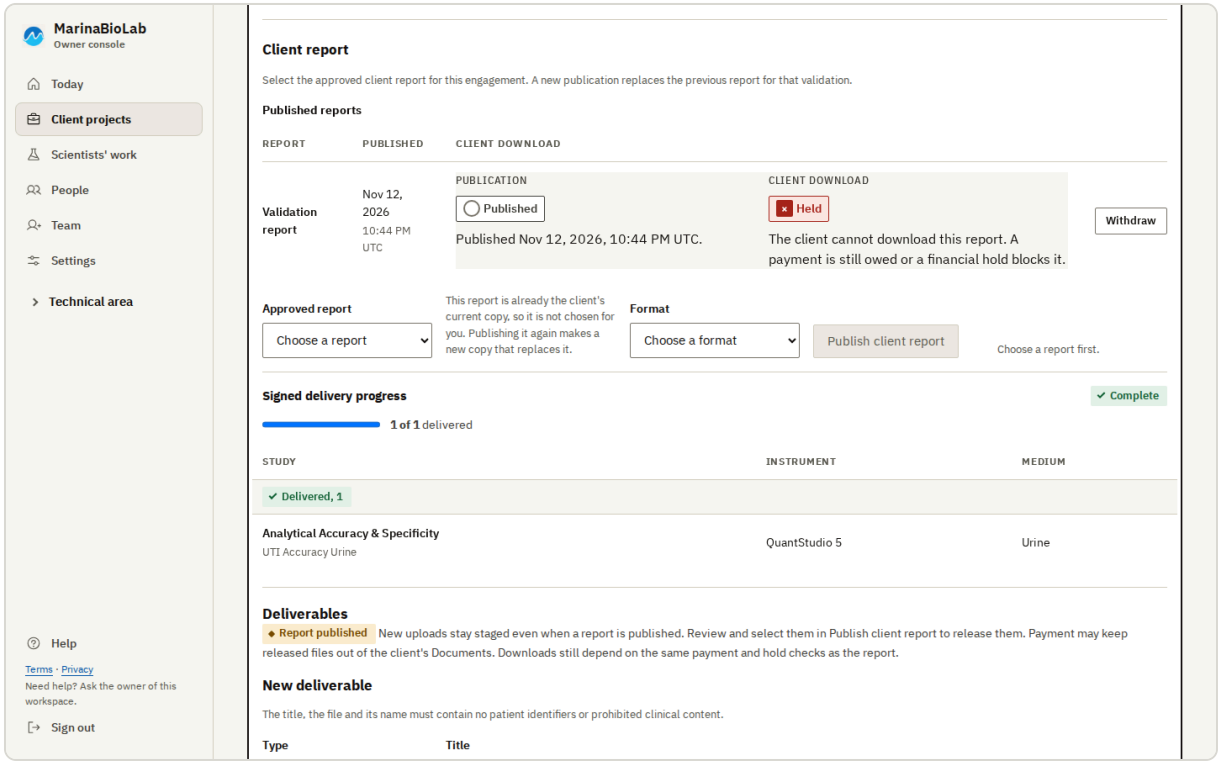
WHERE Browser A. Open P1 and reload the page. In the list of steps, select project step 10, **Report published**.

YOU SEE Project steps 7 and 8 read Done and project step 9 Final payment is open. Under **Signed delivery progress**, the plan's one combination is listed under Delivered, 1.

YOU SEE The published report shows two facts. **Publication** reads Published. **Client download** reads Held, with the line The client cannot download this report and its reason, the final payment.

NOTE The console has its own way to publish a report (B-30). You do not need it here.

STUCK? Reload the page. If the combination does not read Delivered, make sure that you checked its row in B-23d and that you recalculated in B-24 after that. Then tell the owner.



B-27 Project step 10 with the published report.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-28 **Test client** The report waits for the final payment **Portal**

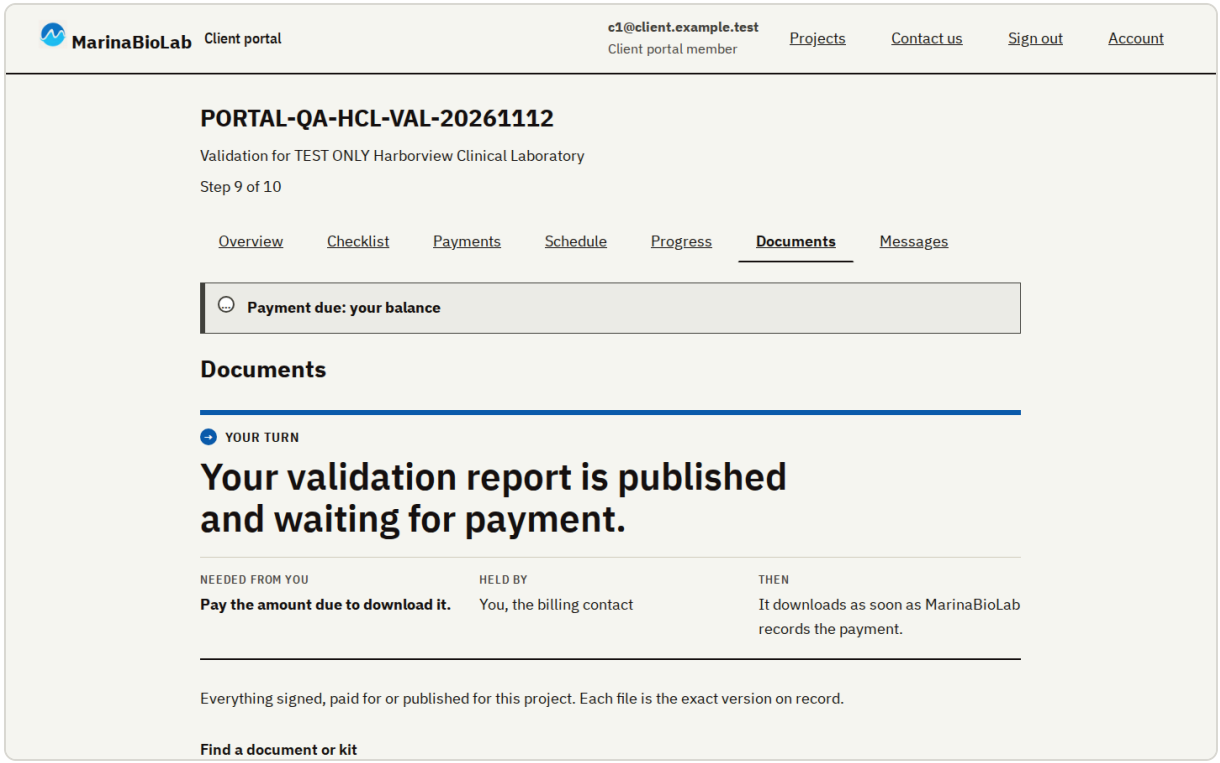
The client should see that the report is ready, but not be able to download it before the last payment.

WHERE Browser B. P1, **Documents** tab. Reload the page.

YOU SEE Under **Not yet available**, the report card reads **Your report is ready. Payment is required before you can download it.** It has an **Open payments** button.

YOU SEE The signed proposal, plan and checklist are listed, each with **Download PDF**.

STUCK? Reload the page. If the report is not listed at all, check B-26 in browser S.



B-28 Documents while the final payment is owed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

B-29 Admin + test client Final payment, then the download

Console

Once the final payment is recorded, the client can download the report.

WHERE Browser A. P1, project step 9 **Final payment**.

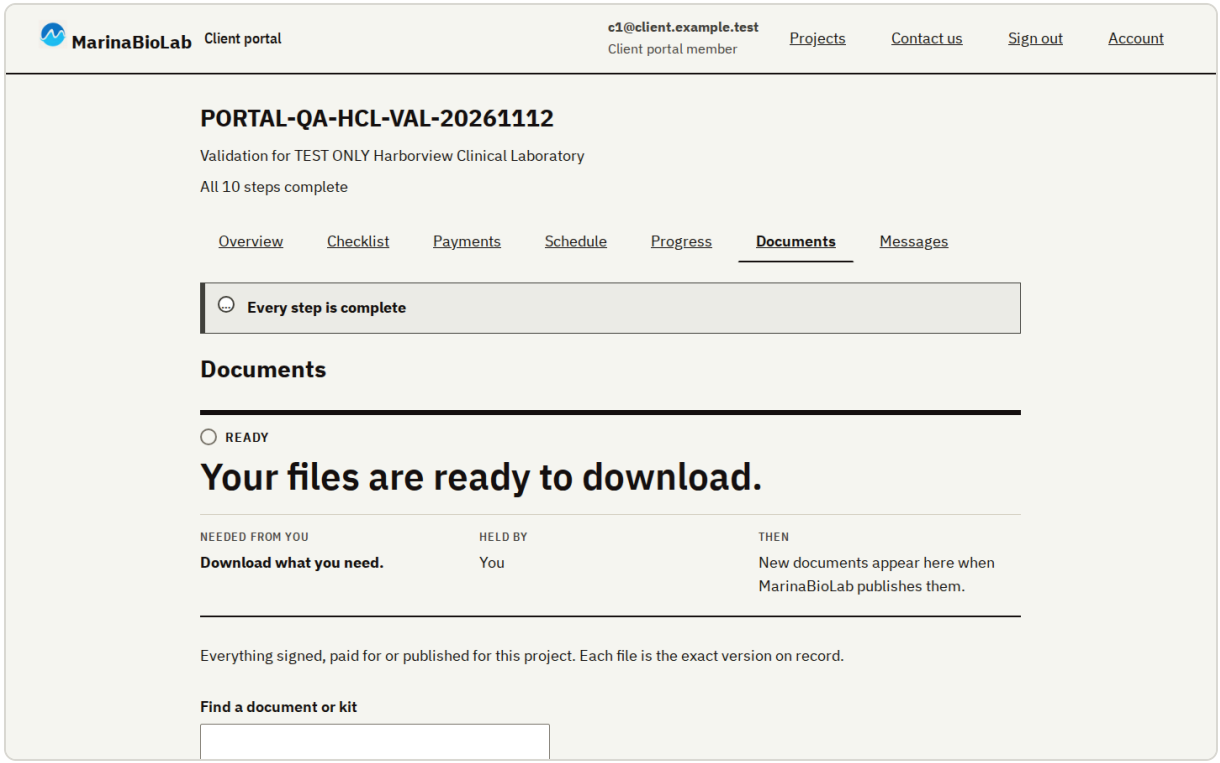
DO On the Balance row, select **Record payment**. Save a wire payment of 500.00 with the reference TEST-WIRE-002, as in B-10.

YOU SEE The row reads Paid, and the page says **Offline payment recorded.** All ten project steps read Done and P1 reads Completed.

DO Portal Switch to browser B, as C1. Reload Documents. On **Your validation report**, select **Download PDF**.

YOU SEE Portal The card **Your validation report** with the tag **Published**. The button may read **Preparing...** for a moment, then the file saves. The PDF carries no draft mark.

STUCK? If the download is still refused, go back to browser A. On **Payment terms**, look for a row that is not Paid, and for an active hold.



B-29 Documents after the final payment.

☐ Pass ☐ Fail ☐ Not run Note

B-30 Admin Publish from the console (optional)

Console Check first

The console has its own way to publish a report. This step tries it.

WHERE	Browser A. P1, project step 10.
DO	In **Approved report**, choose the report. In **Format**, choose Word document.
DO	Select **Publish client report** and confirm.
YOU SEE	A confirmation that starts **Report published.**
CHECK FIRST	The console may refuse to publish the same approved report a second time. If B-26 already published it, skip this step and mark it Not run.
STUCK?	If you are not sure, skip it and mark it Not run. 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**.

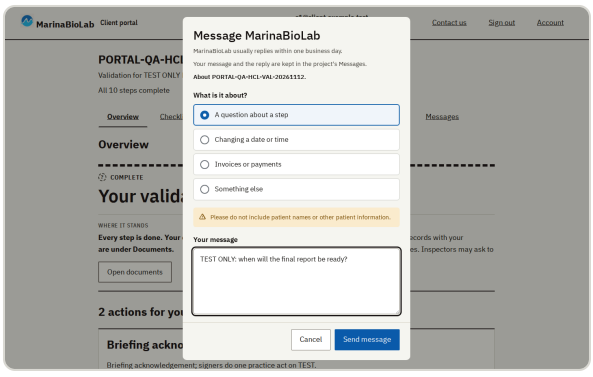
☐ Pass ☐ Fail ☐ Not run Note

B-31 Admin + test client A message and its reply

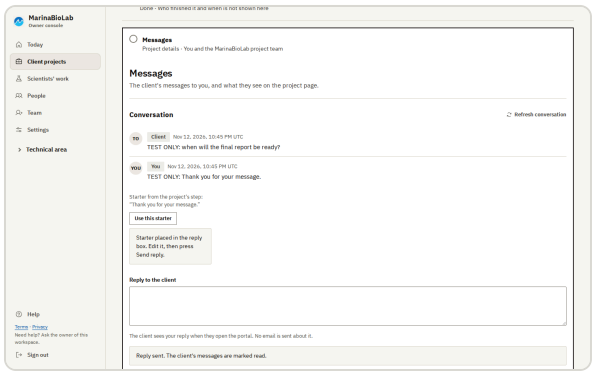
Portal

Clients can write to the lab from the portal. You check that a message arrives and that the reply gets back.

DO	In browser B, as C1, select **Contact us**. Choose **A question about a step**. Write a message that starts with TEST ONLY. Select **Send message**.
YOU SEE	The window closes and a message names the project.
WHERE	Console Browser A. Open P1 directly, because test projects are left out of the unread lists. In P1, open **Choose a step or project details**, then **Messages**.
DO	Console If the reply box offers **Use this starter**, select it and type TEST ONLY: in front of the text. Otherwise type a reply that starts with TEST ONLY in **Reply to the client**. Select **Send reply**.
YOU SEE	Console **Reply sent.** In browser B, on the Messages tab, the reply marked MarinaBioLab sits under the client's message.
STUCK?	If the message is not in the console, reload P1's Messages. It does not show in the unread lists.



B-31a Contact us, with the message typed.



B-31b Messages after Send reply.

☐ Pass ☐ Fail ☐ Not run Note

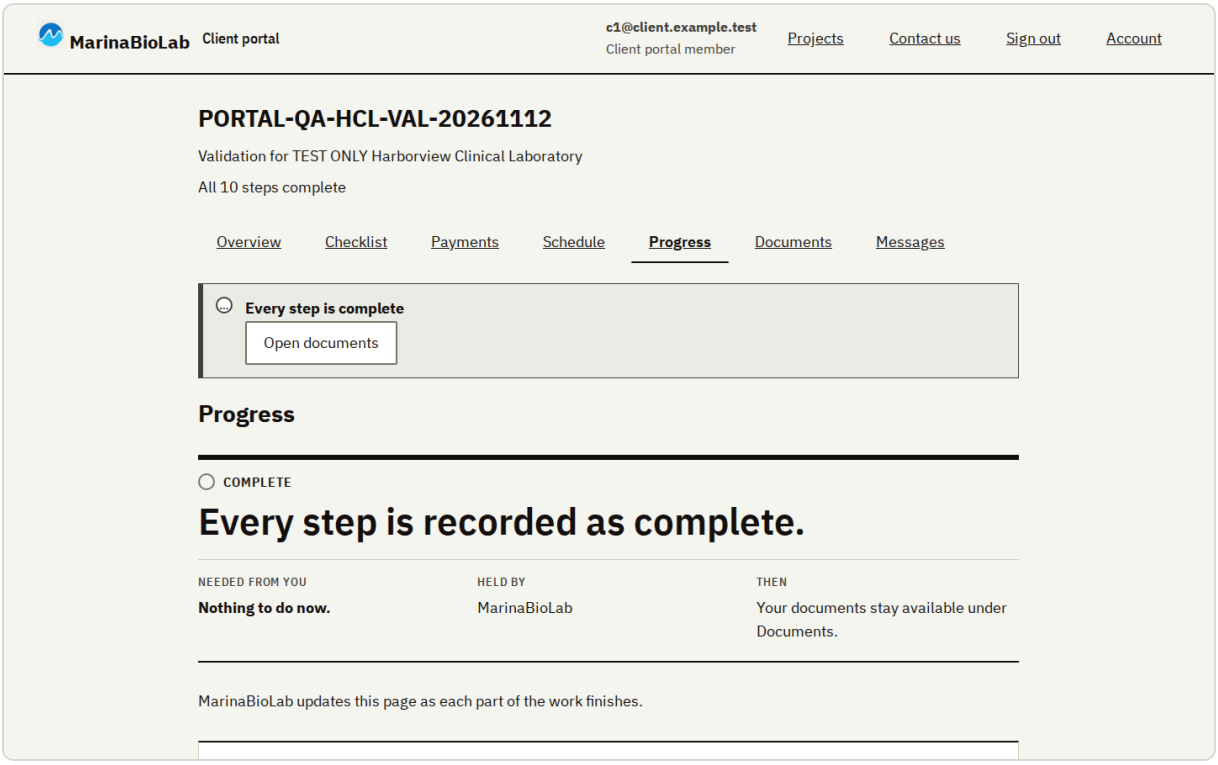
B-32 **Test client** Progress **Portal**

The Progress tab shows the client every project step at once.

WHERE Browser B. P1, **Progress** tab.

YOU SEE Every step has a status word, and all read Complete. The earlier steps are folded into two lines, Getting started and Planning, that also read complete.

STUCK? Reload the page. If a finished step does not read Complete, write which one in the note line.



B-32 The Progress tab.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

CHECKPOINT

If every step in B matched, P1 has a published report and the client has downloaded it. You are done with B, the longest scenario. Take a proper break.

SCENARIO C

Payments on P2

In this scenario you try the less common payment cases on P2: a part payment, the rest of that payment, a refund and a waiver of the balance. A waiver means the lab lets the client off the rest. It needs two people, so a second admin joins you for C-07.

You are here	You finished B. You know how to issue a proposal and record a payment.
Time	About 50 minutes, plus a few minutes of the second admin's time.
Steps	10, from C-01 to C-10

C-01 **Admin + test client** Bring P2 to a signed proposal **Console**

P2 needs the same start as P1 before you can test its payments.

DO	Do B-01, B-01a, B-02, B-03 (C1 only), B-04 and B-05 again, this time on P2.
DO	Stop here, before C1 signs the proposal. Turn to E-10 and do that step now. It works only while P2's proposal is not signed. Then come back to this step.
DO	Now do B-07 on P2. In that step the client signs the proposal.
YOU SEE	P2 reads Active. Its proposal is signed, project step 1 reads Done and project step 2 reads Your turn.
NOTE	In B-03, Primary contact is already checked for C1 and cannot be cleared. Check Signer as well. In B-04, use **Set up and activate** as on P1. If you use the longer forms, **Document access source** may already read Use the issued Validation Proposal.
STUCK?	If one of these steps fails, use the Stuck? line of that B step.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-02 Admin Record a part payment Console

Clients sometimes pay in parts. The console must show what is still owed.

WHERE Browser A. P2, project step 2 **Initial payment received**. The page is headed **Payment terms**.

DO On the Refundable deposit row, select **Record payment**. A form opens further down the page. In it, **Payment** already reads Refundable deposit.

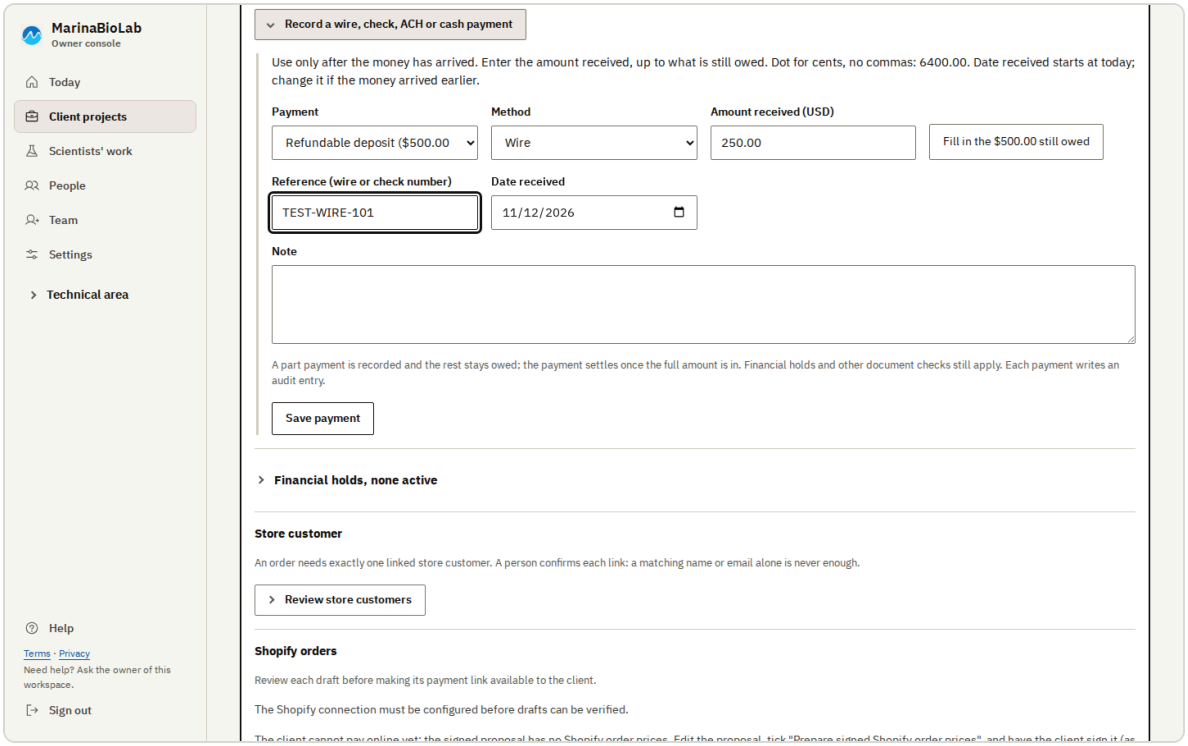
DO In **Method**, choose Wire. In **Amount received**, type 250.00. That is half the deposit. Do not use the button that fills in the amount still owed, because this step pays only half.

DO In **Reference (wire or check number)**, type TEST-WIRE-101. Leave **Date received** as it is. It already reads today.

DO Select **Save payment**.

YOU SEE A green receipt appears. It starts **Part payment recorded.** and says that $250.00 is still owed. The Refundable deposit row reads $250.00 still owed and now also offers **Record refund**. The totals read Received $250.00 and Still owed $750.00.

STUCK? If a box begins **Terms changed since you started: review before recording.** and offers **I have reviewed the changes**, read the changes. Then select that button and save again.



C-02 The form filled in, with 250.00.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-03 Admin Record the rest

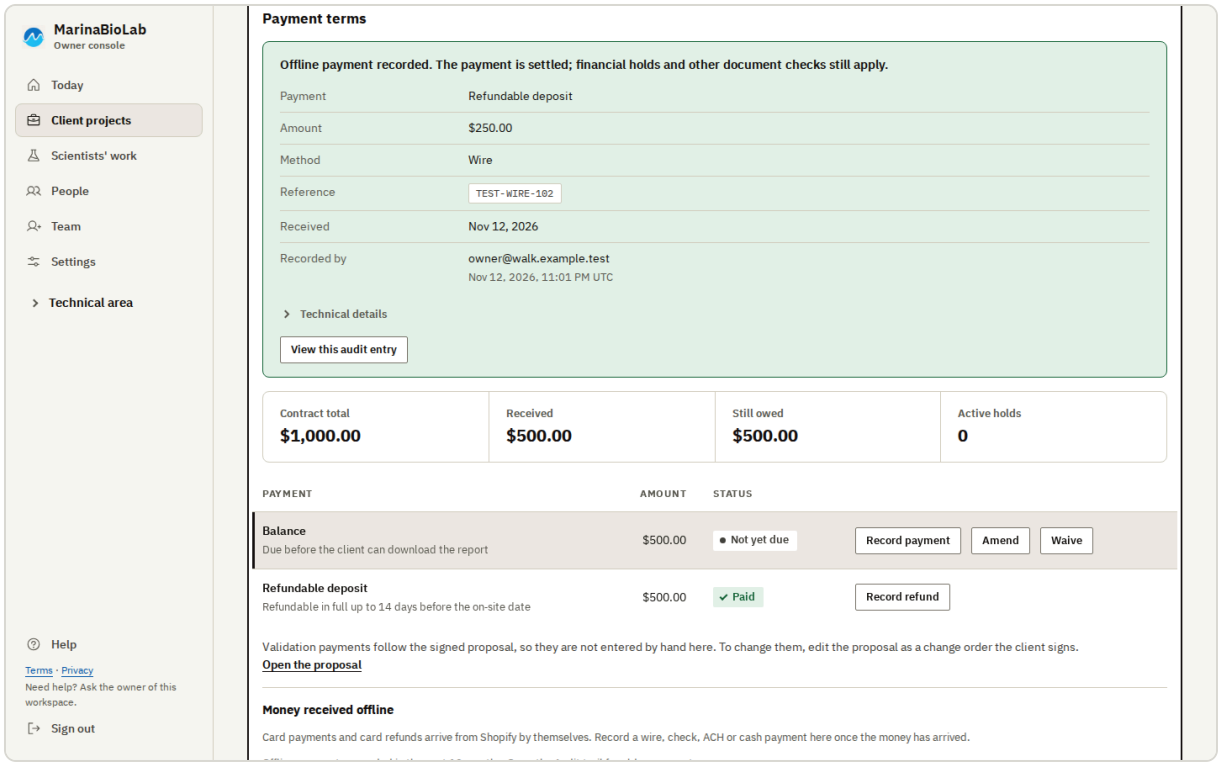
Console

Paying the rest should close the deposit.

DO On the Refundable deposit row, select **Record payment** again. In **Method**, choose Wire. Select **Fill in the $250.00 still owed**. In **Reference (wire or check number)**, type TEST-WIRE-102. **Date received** already reads today. Select **Save payment**.

YOU SEE A receipt reads **Offline payment recorded. The payment is settled; financial holds and other document checks still apply.** The Refundable deposit row reads Paid. Project step 2 reads Done and project step 3 reads Your turn.

STUCK? If the row still shows an amount owed, check that the two amounts you recorded add up to 500.00.



C-03 The receipt, and the deposit row that now reads Paid.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-04 Admin Record a refund

Console

A refund records money the lab sent back. The client should see it.

DO On the Refundable deposit row, select **Record refund**. A form headed **Record an offline refund** opens under the row.

DO In **Amount refunded**, type 50.00. The box starts empty.

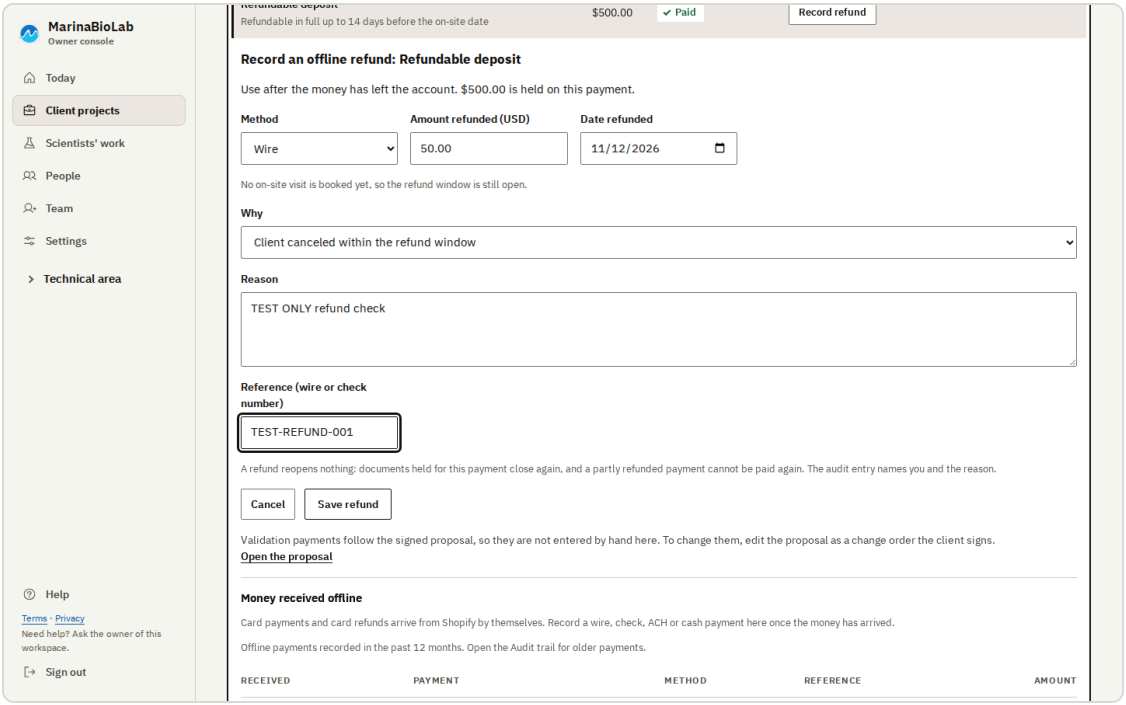
DO In **Method**, choose Wire. In **Why**, choose the first reason. Both start empty. In **Date refunded**, choose today. In **Reason**, type TEST ONLY refund check. In **Reference (wire or check number)**, type TEST-REFUND-001.

DO Select **Save refund**.

YOU SEE **Refund recorded.** The Refundable deposit row reads Partly refunded, with $50.00 returned under it. The totals get a tile that reads Refunded $50.00. Project step 2 stays Done.

YOU SEE A yellow box under the table begins **Needs staff review.** That is normal after a refund. Leave it as it is.

STUCK? If you saved 500.00 by mistake, the whole deposit is refunded. Do not try to undo it. Tick Fail, write what happened in this step's note line and go on. C-05 then shows figures that differ from the ones printed there.



C-04 The refund form, with 50.00 typed.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-05 Test client The refund shows to the client

Portal

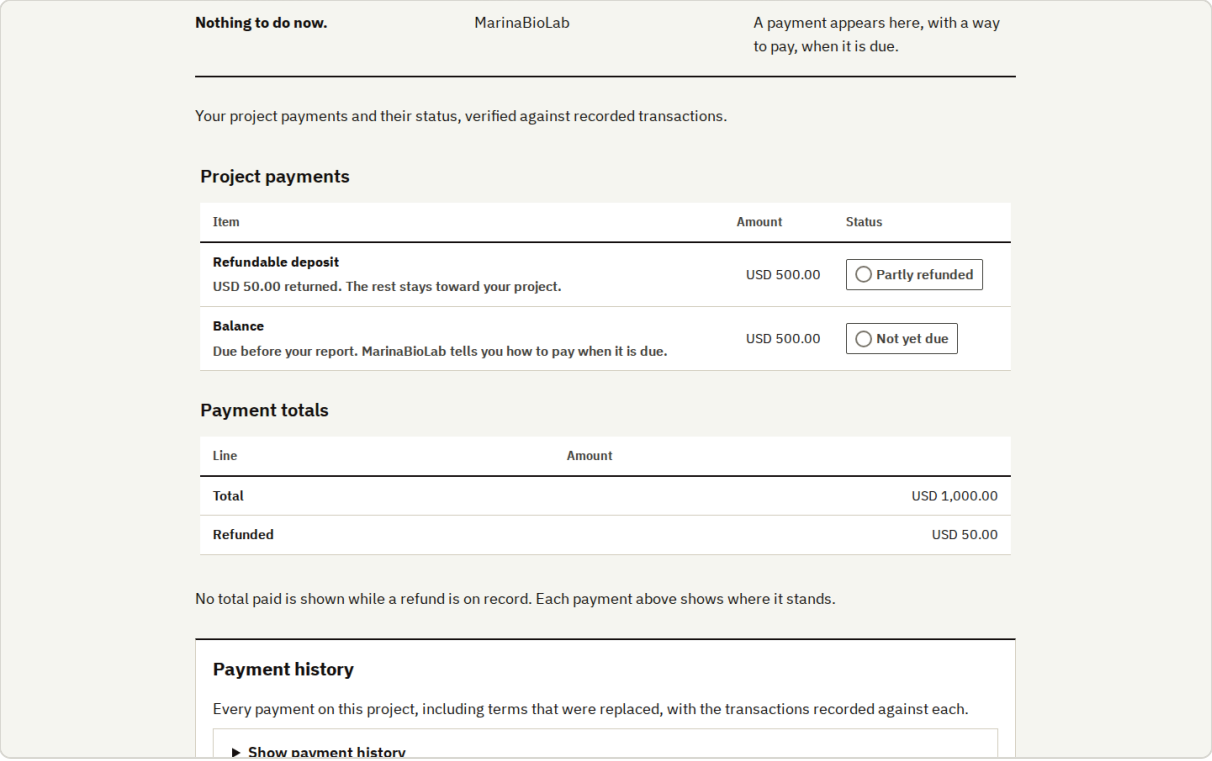
The client should see the refund, and no figure the portal cannot know.

WHERE Browser B. P2. Reload the page, then open **Payments**.

YOU SEE The Refundable deposit row reads USD 500.00 and **Partly refunded**. A line under its name says that USD 50.00 was returned. The Balance row reads **Not yet due**.

YOU SEE Under the table you see Total USD 1,000.00 and Refunded USD 50.00. A line says that no total paid is shown while a refund is on record. There is no paid figure and no progress bar.

STUCK? If the old figures show, reload the page. If P2 is missing, check that C1 accepted P2's invitation in C-01.



C-05 The Payments tab while a refund is on record.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-06 Admin You ask for a waiver of the balance

Console

Waiving means the lab decides the client does not have to pay the balance. It takes two people: one asks and another approves. Here you ask.

WHERE Browser A. P2, project step 2 **Initial payment received**. Find the Balance row. It reads Not yet due.

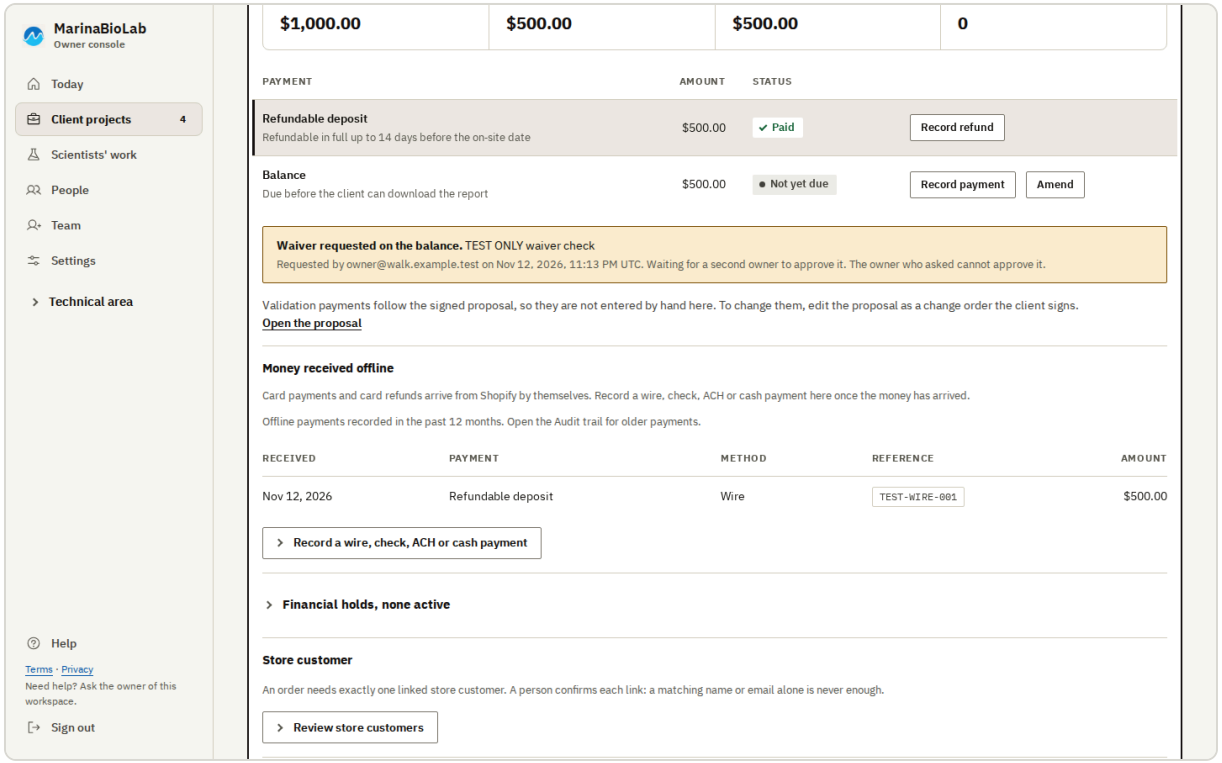
DO On the Balance row, select **Waive**. In **Waive the balance**, type TEST ONLY waiver check in **Reason**. Select **Request waiver**.

YOU SEE **Waiver requested. A second owner approves it before the balance is waived.** Nothing changes for the client yet.

YOU SEE The page offers you no way to approve the request. A yellow notice reads **Waiting for a second owner to approve it. The owner who asked cannot approve it.** While the request waits, **Waive** is gone from the Balance row.

NOTE The console calls everyone who signs in to it an owner, so a second owner means the second admin.

STUCK? If **Waive** is not on the Balance row, write the row's status in this step's note line. Then mark the step Fail or Not run.



C-06 The rows after the request, with the notice that someone else must approve. The picture shows another practice project.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-07 Second admin or owner A second person approves the waiver

Console

Nobody can approve their own waiver, so someone else approves the one you asked for in C-06.

YOU CANNOT DO THIS STEP ALONE
Ask any other lab admin, or the owner, to do this step in their own browser. All of them can sign in to the console. You could say: "Please approve the TEST ONLY waiver on P2's Balance row. I asked for it, so I cannot approve it myself."

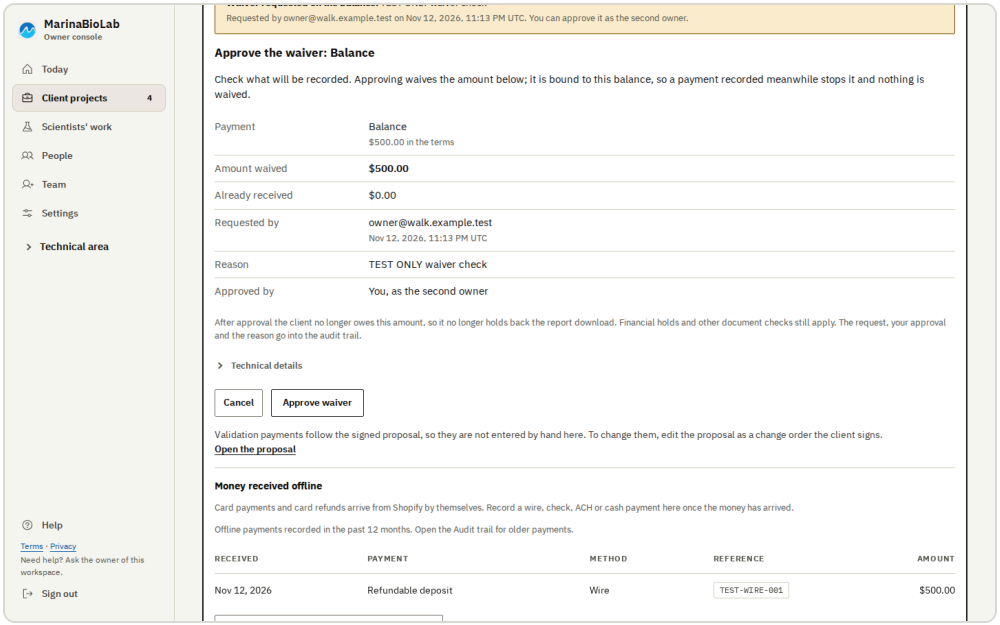
WHERE The second person uses their own browser, signed in to the console as themselves. They open **Client projects** and turn on **Show test projects**. On P2's row, they select **Manage**. In the list of steps, they select project step 2 **Initial payment received**.

DO On the notice that reads **You can approve it as the second owner**, they select **Review waiver**. A form headed **Approve the waiver** opens. They select **Approve waiver**.

YOU SEE They see a confirmation that starts **Waiver approved:** The Balance row reads Waived. The totals read Still owed $0.00 and Waived $500.00.

NOTE Your own page in browser A still shows the old state. Select **Refresh** at the top of the step to see the waiver.

STUCK? If they do not see **Review waiver**, check that they are signed in as themselves and not as you. If this is their first console sign-in, they set up two-step verification first, as in A-01.



C-07 What the second person sees before Approve waiver. The picture shows another practice project.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-08 **Test client** The waiver shows to the client **Portal**

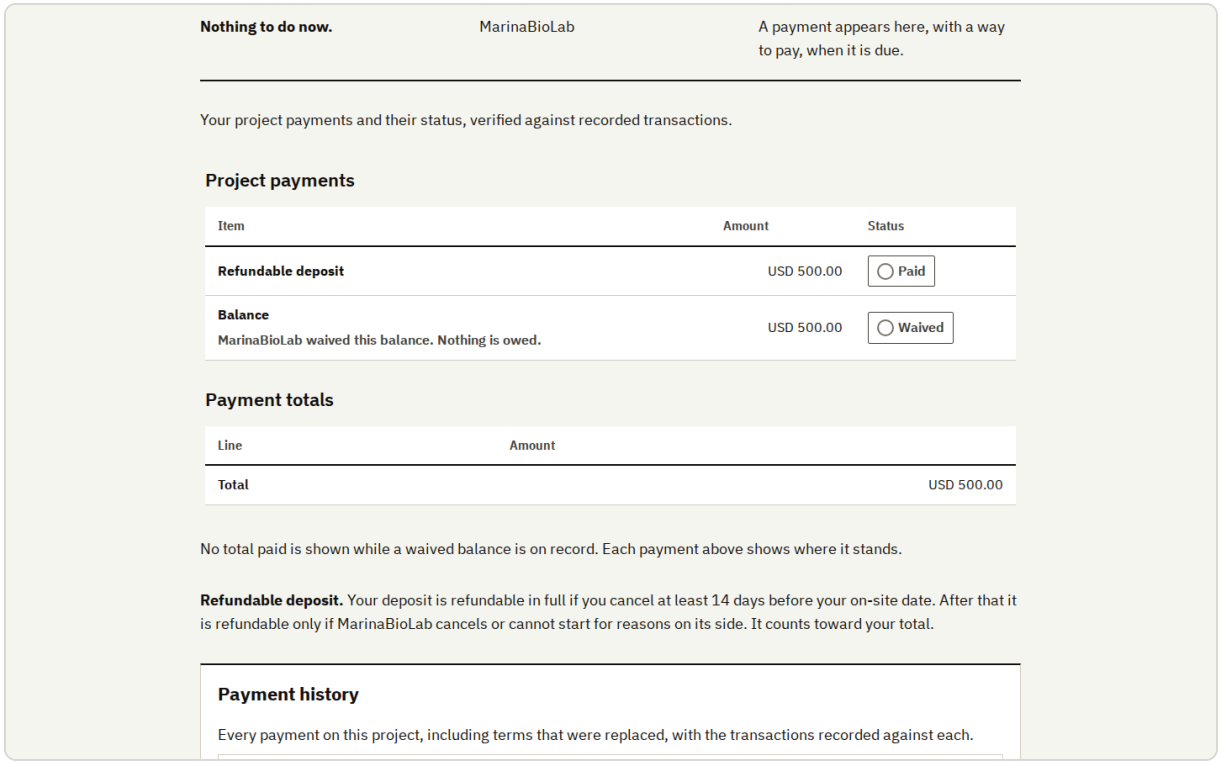
The client should see that the balance is waived.

WHERE Browser B. P2. Reload the page, then open **Payments**.

YOU SEE The Balance row reads **Waived**, with the line **MarinaBioLab waived this balance. Nothing is owed.** Its amount is struck through. Under the table you see Total USD 500.00 and Refunded USD 50.00. There is no paid figure and no progress bar.

YOU SEE On **Progress**, the balance line reads Balance: waived, with Complete. Overview and Progress no longer ask the client to pay the balance.

STUCK? If the Balance row still reads Not yet due, reload the page.



C-08 Payments after the waiver, on another practice project that had no refund.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

C-09 Admin Card payment through Shopify (not run) Portal

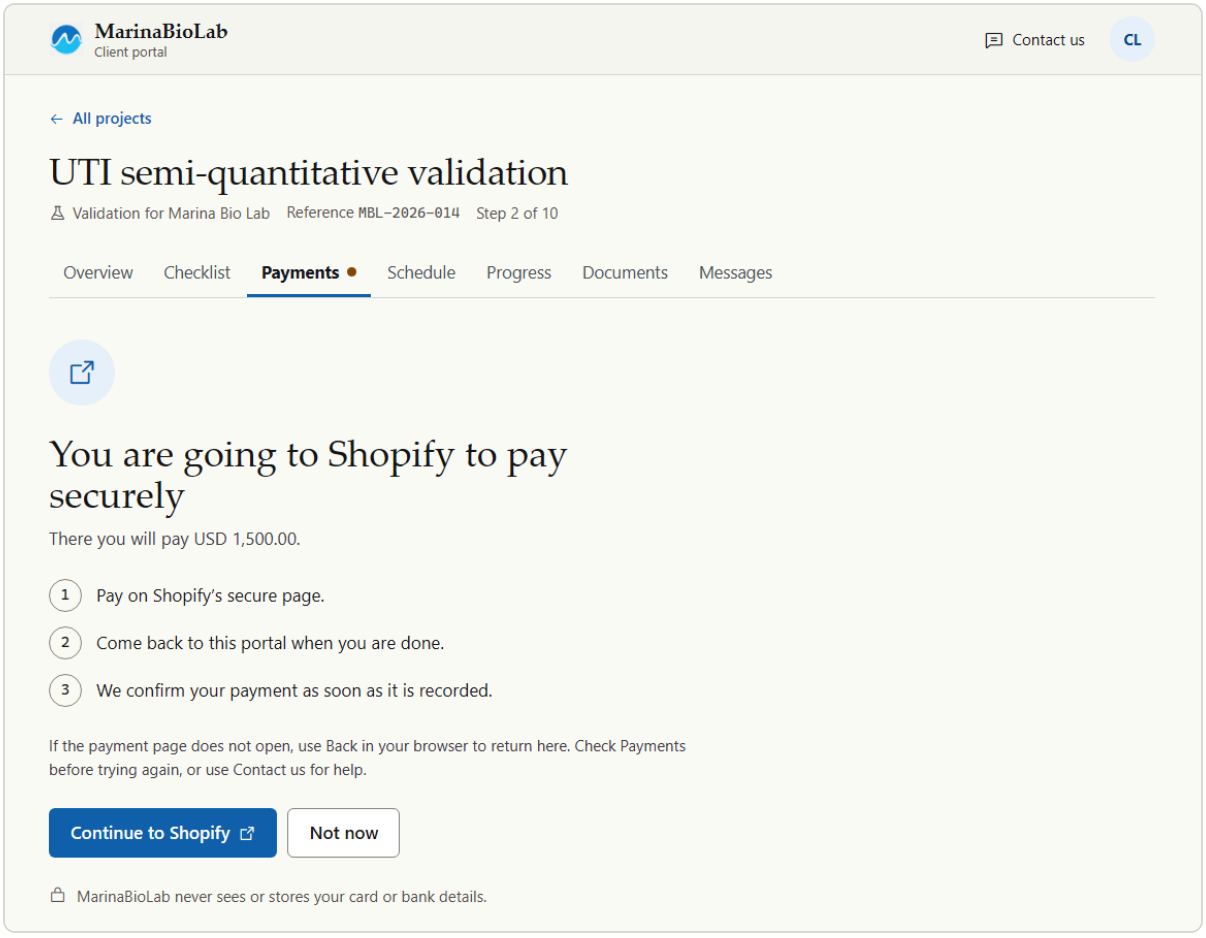
Card payment through the shop is not part of this test. The step stays here so the owner can switch it on later.

DO Mark this step Not run and go on.

NOTE Decided: the Shopify card step is not run (question Q2). The owner can change this. Before that, the owner sets up a Shopify test gateway and a test store customer.

YOU SEE This applies only if the owner switches the step on. You see **Pay on Shopify**, the invoice page, **You are going to Shopify to pay securely** and **Continue to Shopify**. When you return, you see **Confirming your payment** and **Back to your payment**. The row reads Paid once Shopify reports the payment.

STUCK? Never pay with a real card. If anything asks for real card details, stop.



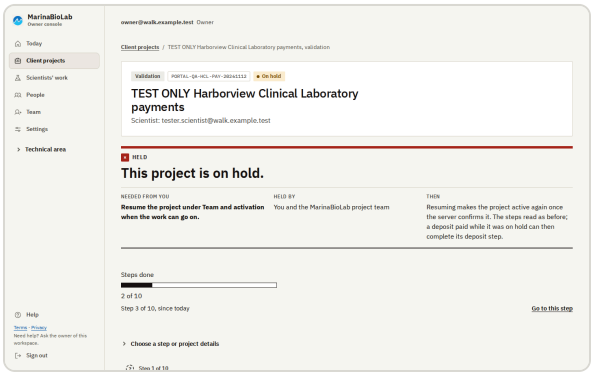
C-09 The hand-off page, from the practice copy. It is here so that you recognize the page. Do not pay anything to reach it.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

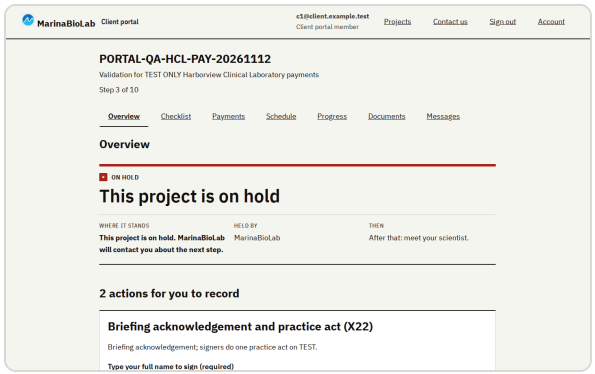
C-10 Admin + test client Pause P2, then resume it Console

A project can wait on something outside the sites, such as a client's decision. Pausing puts it on hold with a reason and stops the reminders. The client sees that it is on hold. Resuming makes it active again.

WHERE	Browser A. P2. Open **Choose a step or project details**, then **Team and activation**.
DO	Open **Pause this project**. In **Reason for pausing (recorded)**, type TEST ONLY: pause check. Select **Pause project**. In the window that opens, select **Pause project** again.
YOU SEE	**Project paused. It is on hold until you resume it.** The box at the top of P2 says This project is on hold.
DO	Portal Browser B, as C1. Reload P2's Overview.
YOU SEE	Portal **This project is on hold. MarinaBioLab will contact you about the next step.** The portal asks nothing of C1.
DO	Back in browser A, open the same place. It now reads This project is on hold: resume it. In **Reason for resuming (recorded)**, type TEST ONLY: resume check. Select **Resume project**. In the window that opens, select **Resume project** again.
YOU SEE	**Project resumed. It is active again.** The box at the top of P2 no longer says it is on hold.
NOTE	While P2 is on hold, its documents cannot be downloaded, except the signed agreements. Do nothing else on P2 until you resume it.
STUCK?	**Pause project** stays switched off until you type a reason. To leave P2 as it is, select **Keep the project as it is** in the window.



C-10a P2 after Pause project.



C-10b P2's Overview in the portal while it is on hold.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

CHECKPOINT

If every step in C matched, every kind of payment on P2 shows correctly to the client. You are done with C. Take a short break.

SCENARIO D

A lab build on P3

A lab build is a different kind of project. MarinaBioLab helps a client set up their lab. The client signs a contract instead of a proposal. In this scenario you create P3 and issue its contract. The client signs it. Then the lab countersigns it, which means the lab signs after the client. You record its three payments, mark its workstreams achieved and close it.

You are here	You have finished C. P1 and P2 are done. Before D-08, ask the owner about ClickUp. The Check first line of that step says why.
Time	About 45 minutes. D-07 needs a person on the lab's countersigner list. If you are not on that list, you need help from a person who is.
Steps	13, from D-01 to D-13

D-01 **Admin** Create the lab build **Console**

P3 is the lab build project of this test.

WHERE	Open **Client projects**. Then select **New project**.
DO	Fill in P3's values from the test data sheet. In **Project type**, choose Lab build.
DO	Select **Create Lab Build**.
YOU SEE	The page says **Project created.** P3 opens as a draft, with 0 of 5 steps done. The 5 steps are Contract signed, Upfront payment received, Workstreams achieved, Milestone payments received, and Welcome and handover packets published.
STUCK?	If the button reads **Create project**, look at **Project type** again. It must read Lab build.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-02 Admin Put the staff on P3

Console

Like P1 and P2, P3 needs named staff before it can go live.

WHERE	On P3, open **Choose a step or project details**. Then select **Team and activation**.
DO	The table marks one role Required: Lab build lead. If the form under the table is closed, select **Assign a staff member**.
DO	In **Staff member**, choose your own address. In **Role on this project**, choose Lab build lead. In **Assignment reason (audited)**, type a reason, for example TEST ONLY: practice run. Select **Save staff assignment**.
YOU SEE	A line that begins **Staff assignment saved**. The table says 1 of 1 required role assigned.
NOTE	Choose your own address, not your Scientist address. You switch P3 on in D-04, and only a person on its staff can do that.
STUCK?	Use the Stuck? line of A-09.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-03 Admin Build and issue the contract

Console

For a lab build, the client signs a contract called a Statement of Work.

WHERE On P3, open project step 1, **Contract signed**.

DO In **Template**, choose Full Lab Build. Two other templates are offered. Do not use them.

DO **Client legal name** and **Contract date** are already filled in. Leave them. In **Panels to validate (one per line)**, type TEST ONLY panel.

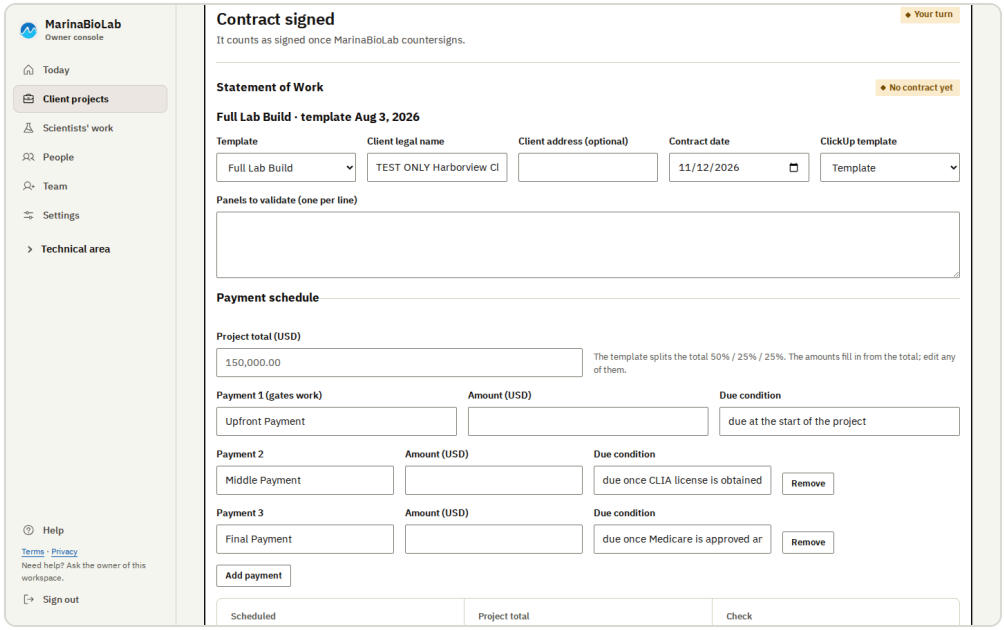
DO In **Project total (USD)**, type 1000.00. The three payments fill in by themselves: Upfront Payment 500.00, Middle Payment 250.00 and Final Payment 250.00. The check under them reads Balanced.

DO Leave everything else as the template filled it. That covers **ClickUp template**, **Client address (optional)**, the timeline, the equipment and the list **Progress items**, which holds the workstreams.

DO Select **Save draft**. Then select **Issue to client**. In the window that opens, select **Issue Statement of Work**.

YOU SEE After you save, the page says **Draft saved. Review the preview, then issue it to the client.** After you issue, it says **Issued. The client can now read and sign the contract in the portal.** The chip then reads Issued, awaiting client signature, version 1.

STUCK? If nothing is saved, look for this message: **Name at least one panel to validate.** It means the panels box is empty. Fill it in and save again. If the check does not read Balanced, the three amounts do not add up to the project total. Type the total again.



D-03 The contract form after Full Lab Build is chosen, before any change.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-04 Admin Invite C1 and switch P3 on

Console

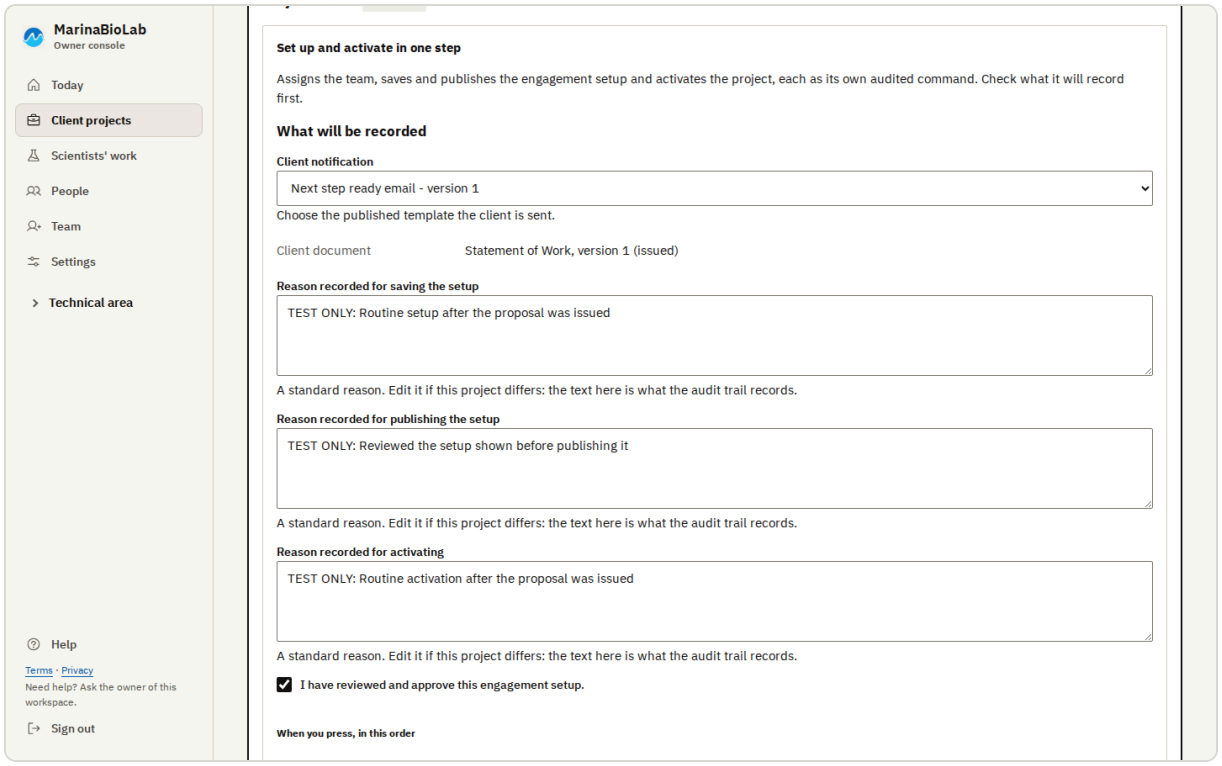
As with P1, the client needs an invitation, and P3 must be active before you countersign in D-07.

DO Do B-03 again on P3, with C1 only. If the invitation card offers a link, copy it and keep it. You need it in the next step.

DO Then switch P3 on as in B-04, with **Set up and activate**. On a lab build, **Client document** names the issued Lab Build contract. A lab build has no **Engagement scope** box. If you have to use the longer forms instead (see the Stuck? line of that step), choose the option that reads Use the issued Lab Build contract in **Document access source**.

YOU SEE After the invitation, P3's status reads Invited. After **Set up and activate**, it reads Active. The box that shows the next step says that the client signs the Statement of Work.

STUCK? Use the Stuck? lines of B-03 and B-04. If activation is refused, check that your own address is on P3's staff (D-02).



D-04 Set up and activate on P3: the contract is the client document.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-05 Test client C1 signs the contract

Portal

The client signs the contract the same way they signed the proposal.

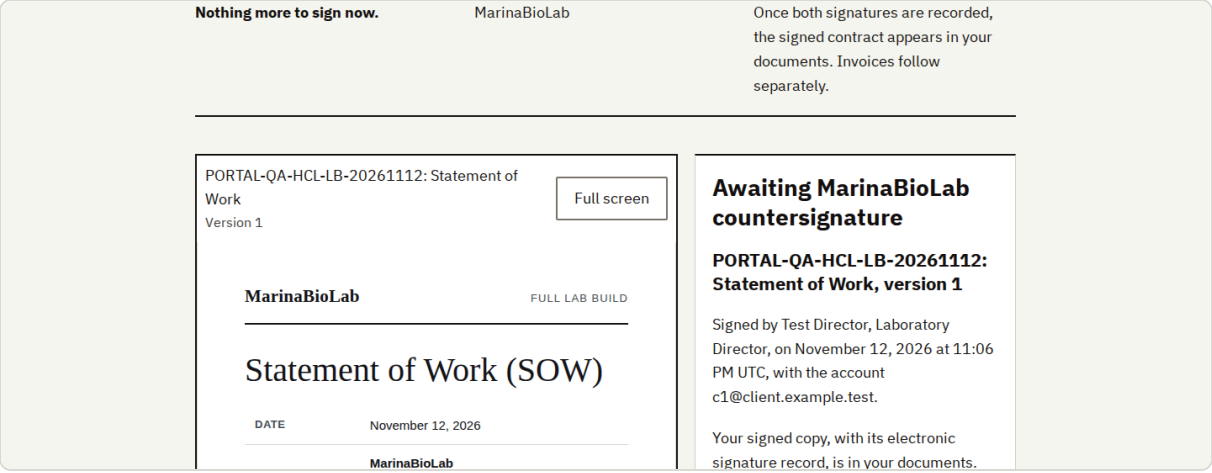
WHERE Browser B. Open C1's invitation link for P3. Accept the invitation as in B-05.

DO On P3's Overview tab, select **Review and sign**. Read the Statement of Work. Check the boxes and type the name and title from the test data sheet, as in B-07. Then select **Sign the contract**.

YOU SEE A card reads **Awaiting MarinaBioLab countersignature**. It shows the name, the time and the sign-in email. It says that MarinaBioLab countersigns next.

NOTE On P3 too, Overview shows the block that says 2 actions for you to record. Leave it alone, as in B-05.

STUCK? Reload the page once and look again. If it still does not match, tick Fail, take a screenshot named after this step and go on to the next one.



D-05 The portal after the client signed.

☐ Pass ☐ Fail ☐ Not run Note

D-06 Test client The lab build's tabs

Portal

A lab build shows the client fewer tabs than a validation does.

WHERE Browser B. Open P3 if it is not open.

YOU SEE Five tabs: Overview, Payments, Progress, Documents and Messages. There is no Checklist tab and no Schedule tab.

YOU SEE The Payments tab says that the payment schedule appears once the contract is signed and countersigned. The Documents tab says there is nothing to download yet.

STUCK? Reload the page once and look again. If it still does not match, tick Fail, take a screenshot named after this step and go on to the next one.

☐ Pass ☐ Fail ☐ Not run Note

D-07 Admin Countersign the contract

Console Check first

A lab build contract also needs a MarinaBioLab signature, after the client's. That is the countersignature.

NOTE Only a person on the lab's countersigner list can countersign. If you are on it, do this step yourself. If you are not, ask a person on the list with these words: "Please countersign the TEST ONLY contract on P3, project step 1."

WHERE Browser A. Open P3, project step 1. Reload the page. Until you reload, the page still says the client has not signed.

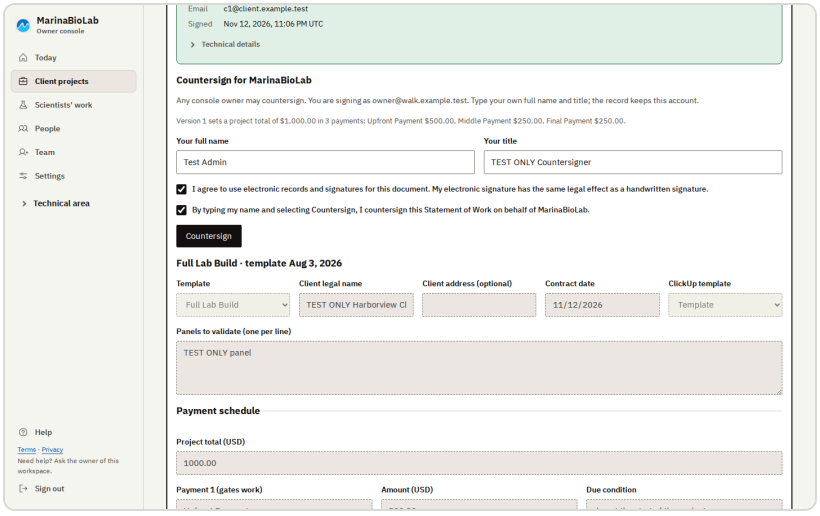
DO The chip now begins **Client signed**. Under the block **Signed by the client in the portal**, find **Countersign for MarinaBioLab**.

DO Type your full name in **Your full name** and your title in **Your title**. Check the 2 statements. Select **Countersign**. No window asks you to confirm.

YOU SEE The page says **Countersigned. The contract is signed; the payment schedule is live and the upfront payment is due.** The chip begins **Signed and countersigned**. Project step 1 reads Done.

CHECK FIRST Before you type anything, write down the line above **Your full name**. For a person on the countersigner list it should begin You are on the countersigner list.

STUCK? If you see this message: **Only the people on the countersigner list can countersign. Ask one of them to sign in and countersign.** Your address is not on the list. Ask a person on the list to countersign. If the console says Countersigning needs a code from your authenticator app, the server is set to ask for a second factor. Type the 6-digit code from the app in **Authentication code**. Then select **Confirm and countersign**.



D-07 The countersign form with a test name. On your screen the line above the name boxes may read differently.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-08 Admin Record the upfront payment

Console Check first

The contract asks for a first payment before work starts. You record it by hand.

CHECK FIRST Ask the owner about ClickUp before you do this step. When ClickUp is connected, recording this payment can make a ClickUp list for a project. The console makes none for a test project. A test project is one with a PORTAL-QA- identifier or a client name with TEST ONLY. Check that P3's client legal name starts with TEST ONLY. Write down what the owner said.

WHERE On P3, open project step 2, **Upfront payment received**.

DO On the row Upfront Payment, select **Record paid**.

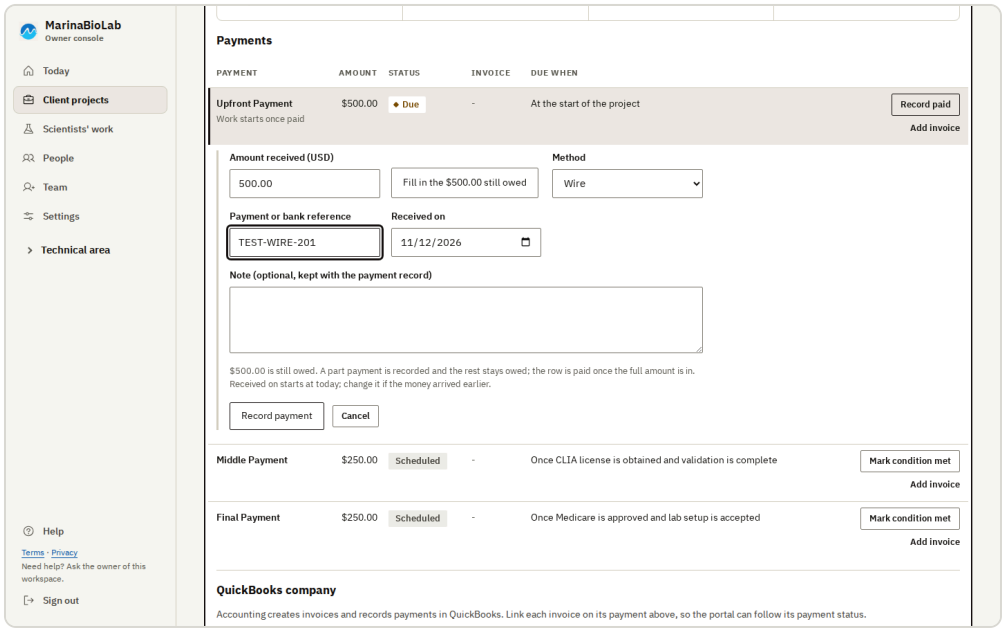
DO In **Method**, choose Wire. The list starts empty. Select **Fill in the $500.00 still owed**, or type 500.00 in **Amount received**. In **Payment or bank reference**, type TEST-WIRE-201. **Received on** already holds today's date. Leave it.

DO Select **Record payment**. No window asks you to confirm.

YOU SEE A line says that $500.00 is recorded on Upfront Payment and that the payment is paid in full. The row reads Paid. Project step 2 reads Done.

NOTE Do not use **Add invoice**, **Link a verified QuickBooks invoice** or **Connect QuickBooks**. QuickBooks is the lab's accounting software, and test projects stay out of it.

STUCK? If **Record paid** is missing, check that the countersignature in D-07 went through. The payment schedule starts only after the countersignature.



D-08 The Record paid form on the row Upfront Payment.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-09 Admin The two milestone payments Console

A milestone payment falls due when a stage of the work is done. You mark the stage done, then record the payment. This contract has two milestones.

WHERE On P3, open project step 4, **Milestone payments received**. It shows the same payment table, with three rows.

DO On the row Middle Payment, select **Mark condition met**. In **Which condition was met (kept in the record)**, type TEST ONLY: condition met for a practice run. Select **Mark as met**. In the window that opens, select **Mark condition met**.

YOU SEE A line says that Middle Payment is now due. The row reads Due.

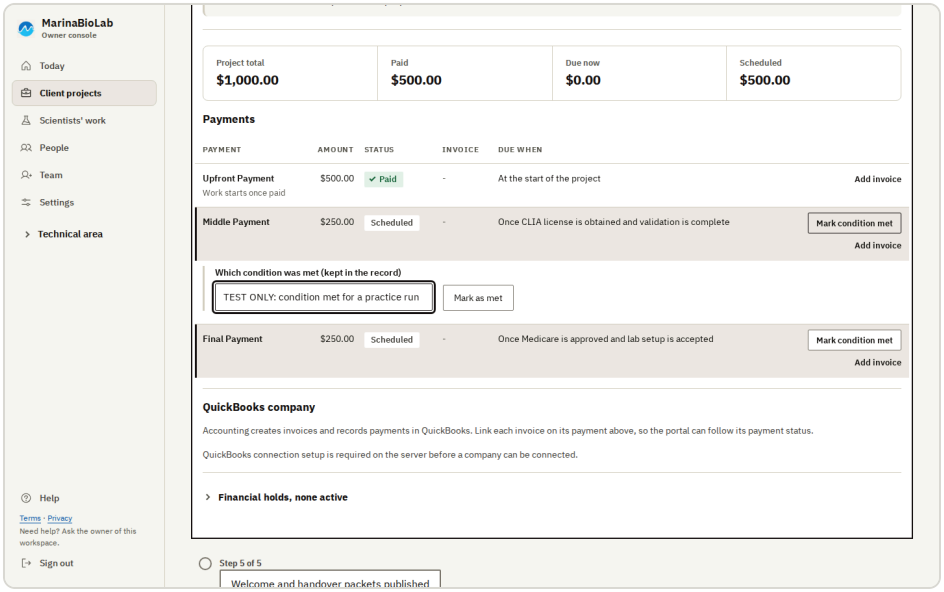
DO On the same row, select **Record paid**. Fill in the form as in D-08: choose Wire, type 250.00 as the amount and type TEST-WIRE-202 as the reference. Select **Record payment**.

DO Now do both on the row Final Payment. Mark its condition met, then record the payment. Use the same amount and the reference TEST-WIRE-203.

YOU SEE All three rows read Paid. Project step 4 reads Done only after the second milestone is paid.

NOTE When every workstream a milestone rests on reads Achieved, the console proposes marking that milestone's condition met, with the dates in the reason. This test marks the workstreams later, in D-11, so you see no proposal here.

STUCK? If project step 4 still reads Not started, one milestone is not paid yet. Look for a row that reads Scheduled or Due. Do the Do lines above for that row.



D-09 Mark condition met on the row Middle Payment.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-10 Test client The lab build's payments

Portal

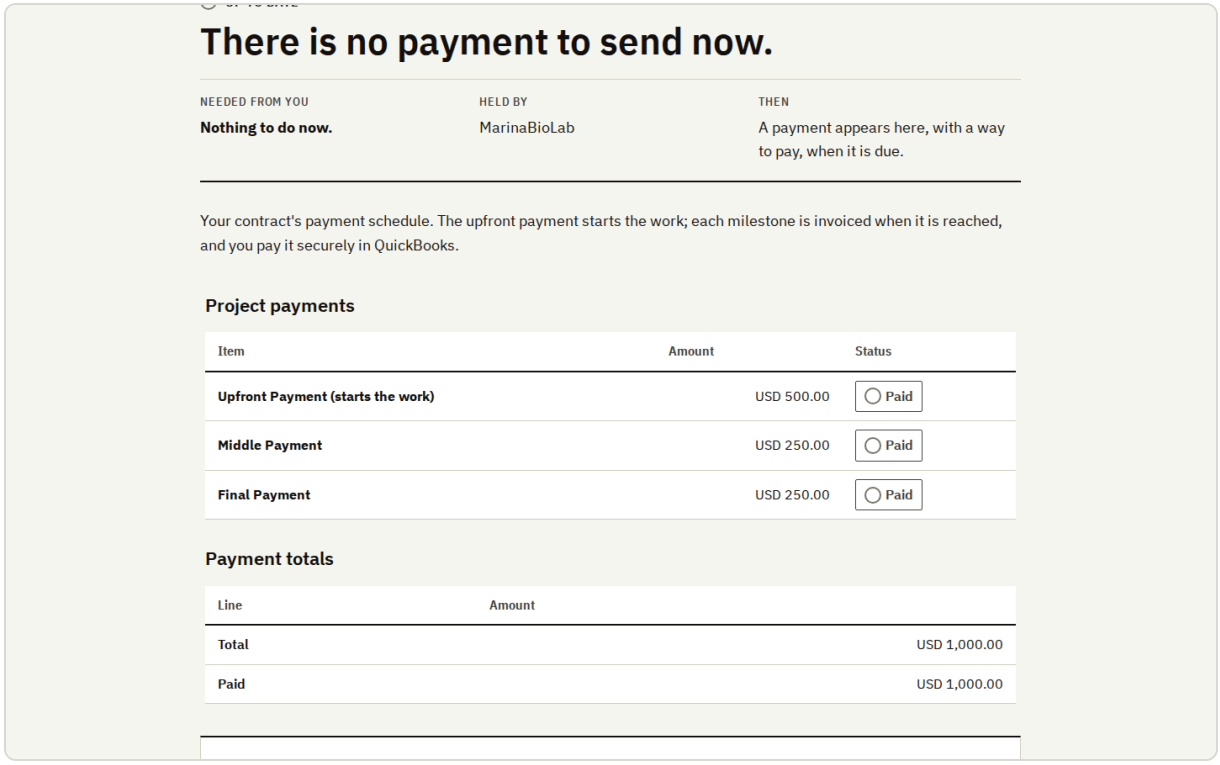
The client should see the lab build's payments as paid.

WHERE Browser B. On P3, reload the page. Then open **Payments**.

YOU SEE Three rows: Upfront Payment, Middle Payment and Final Payment. Each reads **Paid**. Under them: Total USD 1,000.00 and Paid USD 1,000.00. The Action column shows only a dash. There is no **Pay in QuickBooks**, because no invoice is linked.

YOU SEE The Documents tab now lists the signed Statement of Work.

STUCK? If Payments still shows the empty text of D-06, reload the page. If a row reads **Not yet due**, you have not marked that milestone as met. Go back to D-09.



There is no payment to send now.

NEEDED FROM YOU	HELD BY	THEN
Nothing to do now.	MarinaBioLab	A payment appears here, with a way to pay, when it is due.

Your contract's payment schedule. The upfront payment starts the work; each milestone is invoiced when it is reached, and you pay it securely in QuickBooks.

Project payments

Item	Amount	Status
Upfront Payment (starts the work)	USD 500.00	Paid
Middle Payment	USD 250.00	Paid
Final Payment	USD 250.00	Paid

Payment totals

Line	Amount
Total	USD 1,000.00
Paid	USD 1,000.00

D-10 The three payments in the portal, all paid.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-11 Admin Mark the workstreams achieved

Console Check first

Workstreams are the parts of the lab build work that the contract lists. P3 can be closed only when every one of them reads Achieved.

WHERE On P3, open project step 3, **Workstreams achieved**.

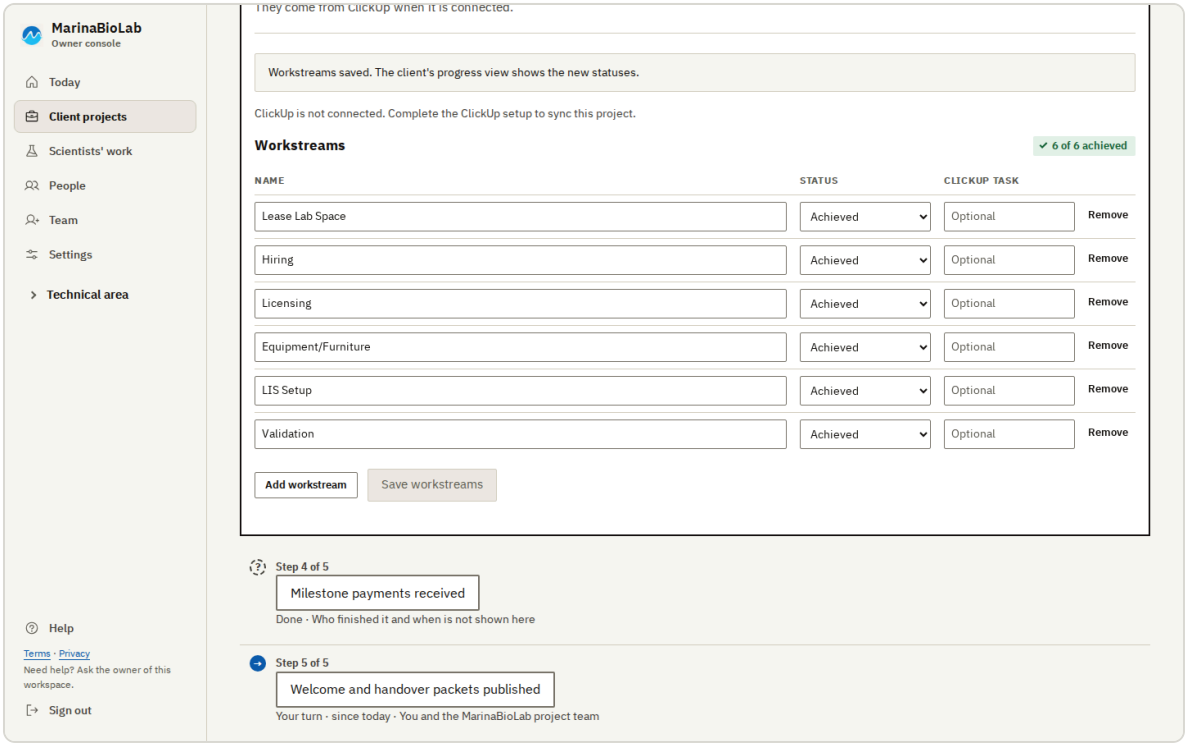
YOU SEE The table lists the six workstreams from the contract: Lease Lab Space, Hiring, Licensing, Equipment/Furniture, LIS Setup and Validation. It says 0 of 6 achieved.

DO In the column Status, set every row to Achieved. Leave the boxes in the column ClickUp task empty. Select **Save workstreams**.

YOU SEE The page says **Workstreams saved. The client's progress view shows the new statuses.** The table says 6 of 6 achieved.

CHECK FIRST This guide cannot say whether project step 3 closes by itself once all six workstreams read Achieved. After you save, write down whether project step 3 reads Done. If it does not, you close it in D-13.

STUCK? If the rows have no Status list, or the page tells you to update the workstreams in ClickUp, P3 is linked to ClickUp. Change nothing in ClickUp. Mark this step Not run and tell the owner.



D-11 All six workstreams set to Achieved and saved.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-12 Admin Publish a welcome document

Console

At the end of a lab build, the lab publishes welcome and handover documents for the client.

WHERE On P3, open project step 5, **Welcome and handover packets published**. The list already has three rows for the signed Statement of Work.

DO Open **Upload a document**. In **Type**, choose Welcome packet. In **Title**, type TEST ONLY welcome packet. In **File (PDF, DOCX or XLSX, up to 3 MB)**, choose the file F2.

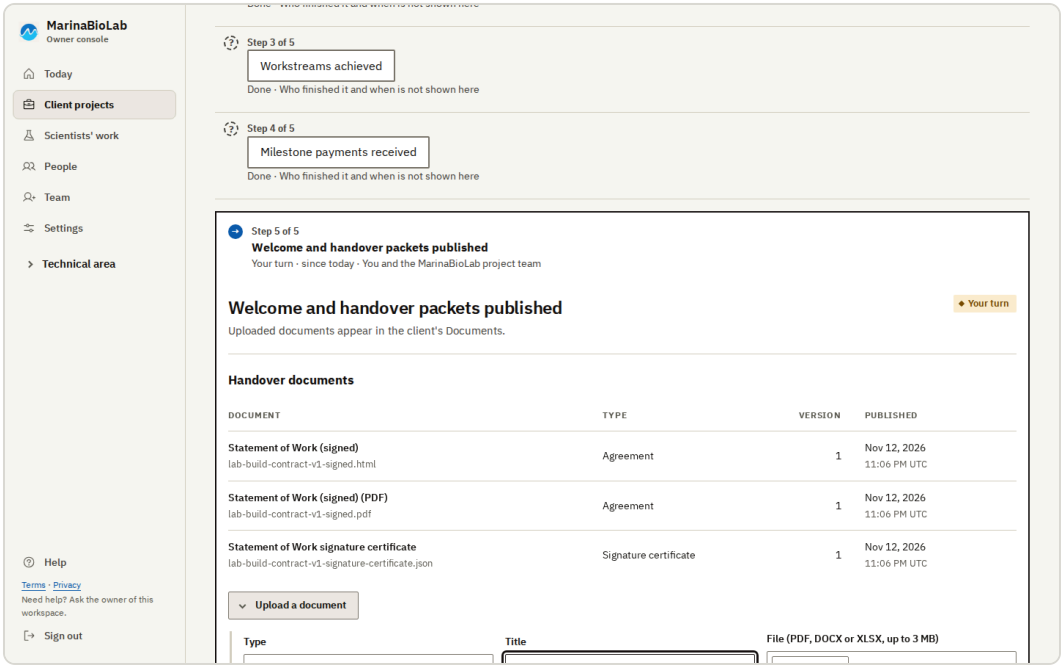
DO Select **Upload and publish**. A window asks whether to publish the file to P3's Documents. In that window, select **Publish document**.

YOU SEE The page says **Uploaded and published to the client's Documents.** The document is in the list. Project step 5 reads Done. In browser B, after a reload, C1 sees the document on the Documents tab.

NOTE The portal lists the document by the title you typed.

NOTE Use F2 only. In the type list, choose Welcome packet or Handover packet. The third type, Documentation template, does not close project step 5. The window says a document can be withdrawn later from this list, with a reason. Do not withdraw it in this test.

STUCK? If the upload is refused, read the red message. A file that fails the security check is refused with its own sentence. Use F2 only. If F2 itself is refused, tick Fail, take a screenshot and go on. You close project step 5 by hand in D-13.



D-12 The upload form filled in.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

D-13 Admin Close the lab build Console

Closing marks the lab build complete. The console allows it only when every project step reads Done, every workstream reads Achieved and every payment row reads Paid.

WHERE On P3, open **Choose a step or project details**. Then select **All steps and overrides**.

DO Look at the step list on the left. If all five steps read Done, skip the next Do line and go to the last one.

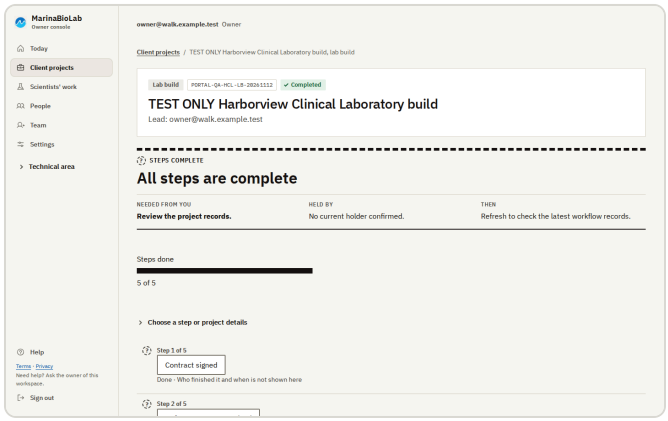
DO If project step 3 or project step 5 is still open, choose it in **Step**. Type a reason that starts with TEST ONLY in the box **Reason (audited)** beside **Step**. Do not use the second box of that name, beside **Request state**. Select **Complete step** and confirm. If both steps are open, do this once for each.

DO Select **Mark project complete**. In the window that begins **Mark this Lab Build complete?** select **Mark project complete** again.

YOU SEE The page says **Lab Build marked complete.** P3 reads Completed, with 5 of 5 steps done. In browser B, after a reload, the portal says that the lab build is complete.

NOTE Do not select **Request override**.

STUCK? If a red message begins This project still has, it lists what is still open, by the names on the screen. For unpaid payments, pay those rows in D-09. For open project steps, finish them. For workstreams not achieved, set them in D-11. Put right what the message names and try again. The message ends by telling you to refresh. A refresh alone changes nothing. If you see this message: **The project is not active. Activate it under Team and activation first.** Go back to D-04.



D-13 P3 after Mark project complete.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

CHECKPOINT

If every step in D matched, P3 reads Completed. You are done with D. Take a short break.

SCENARIO E

Negative checks

In this scenario you check that the sites refuse what they should. In each step you try something that must fail or stay hidden. A step passes when the refusal happens as the step describes.

You are here	You finished Scenario D. All three test projects exist. You already did step E-10 during C-01.
Time	About 45 minutes.
Steps	11, from E-01 to E-11

E-01 **Scientist** An account that is not on the list cannot sign in **Console**

Only people on the console's access list may open the owner console.

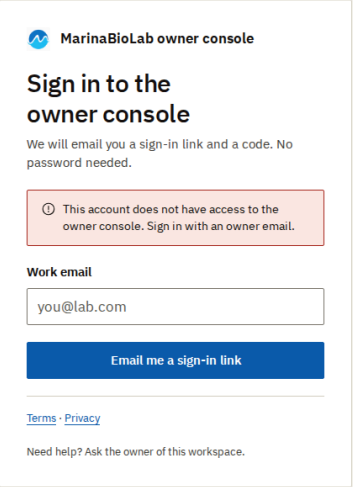
DO In browser S, open the owner console at https://qpcr-admin.vercel.app. Type your Scientist address in **Work email**. Select **Email me a sign-in link**.

YOU SEE The page reads **Check your email**. The console sends the email even though the address is not on the access list. That is expected.

DO Open the email. Type the code from it in **Enter the code from the email**. Select **Sign in with the code**. You can use the link in the email instead.

YOU SEE The sign-in page comes back. A red box reads: **This account does not have access to the owner console. Sign in with an owner email.**

STUCK? If the console opens for the Scientist address, that address is on the access list. Tick Fail and tell the owner.



E-01 The refusal on the sign-in page.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-02 Admin + test client A revoked invitation

Console

Revoking cancels an invitation, so its link must stop working.

WHERE Browser A. Open P1. Open **Choose a step or project details**, then **Client access**.

DO Type C4's address in **Invite client email**. Check Signer first. Then clear Primary contact. Select **Invite client**. Keep the invitation link, as you did in B-03.

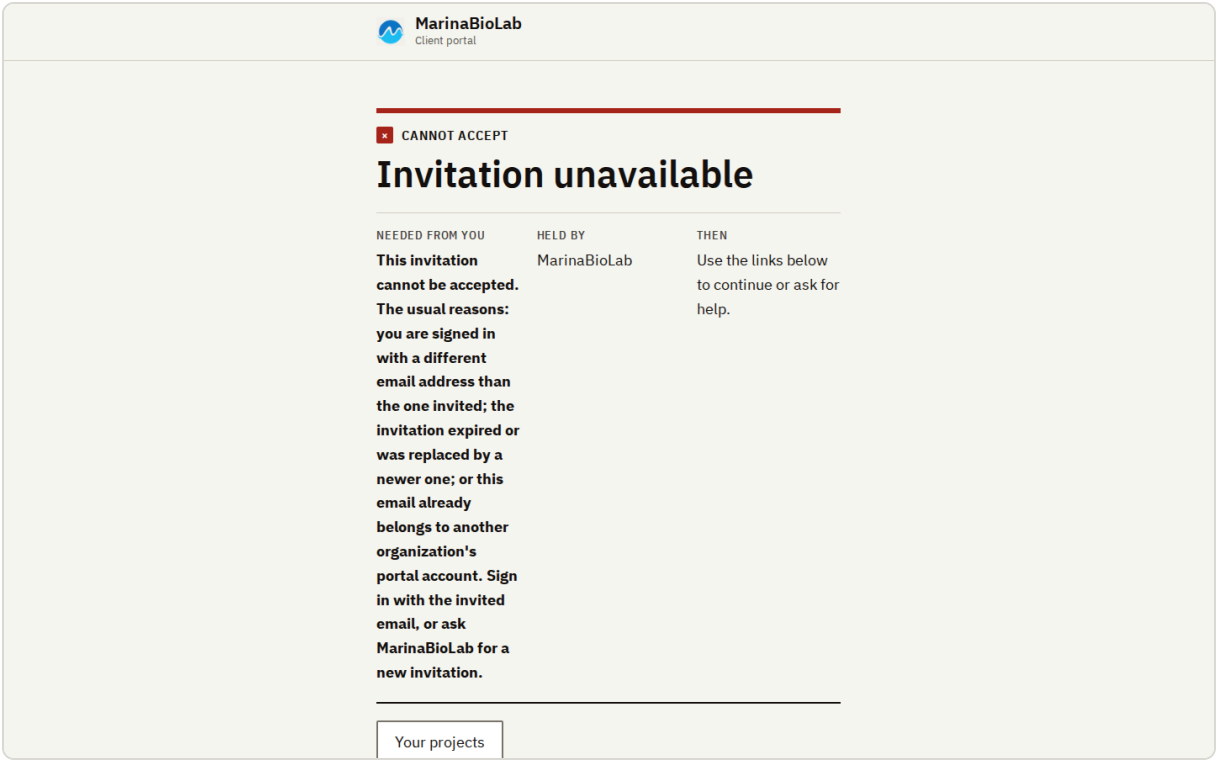
DO Find C4's row under **Open invitations**. Select **Revoke** on that row. Type TEST ONLY revoke check in **Why revoke it (audited)**. Select **Revoke invitation**. That button stays switched off until you type a reason.

YOU SEE A line names C4's address and ends with **The link no longer works.** C4's row is gone from the list.

DO Portal In browser C, a private window, open C4's link. The portal's **Sign in** page opens first. Sign in as C4, the same way as in B-05.

YOU SEE Portal The page reads **Invitation unavailable**. A red box lists the usual reasons. There is no accept form. The text does not use the word revoked. That is expected.

STUCK? If the link still opens the accept form, do not accept it. Tick Fail and take a screenshot.



E-02 What the revoked link opens after C4 signs in.

☐ Pass ☐ Fail ☐ Not run Note

E-03 **Test client** An invitation link already used **Portal**

An invitation link works once. When a client opens it again, the portal should send the client to their projects.

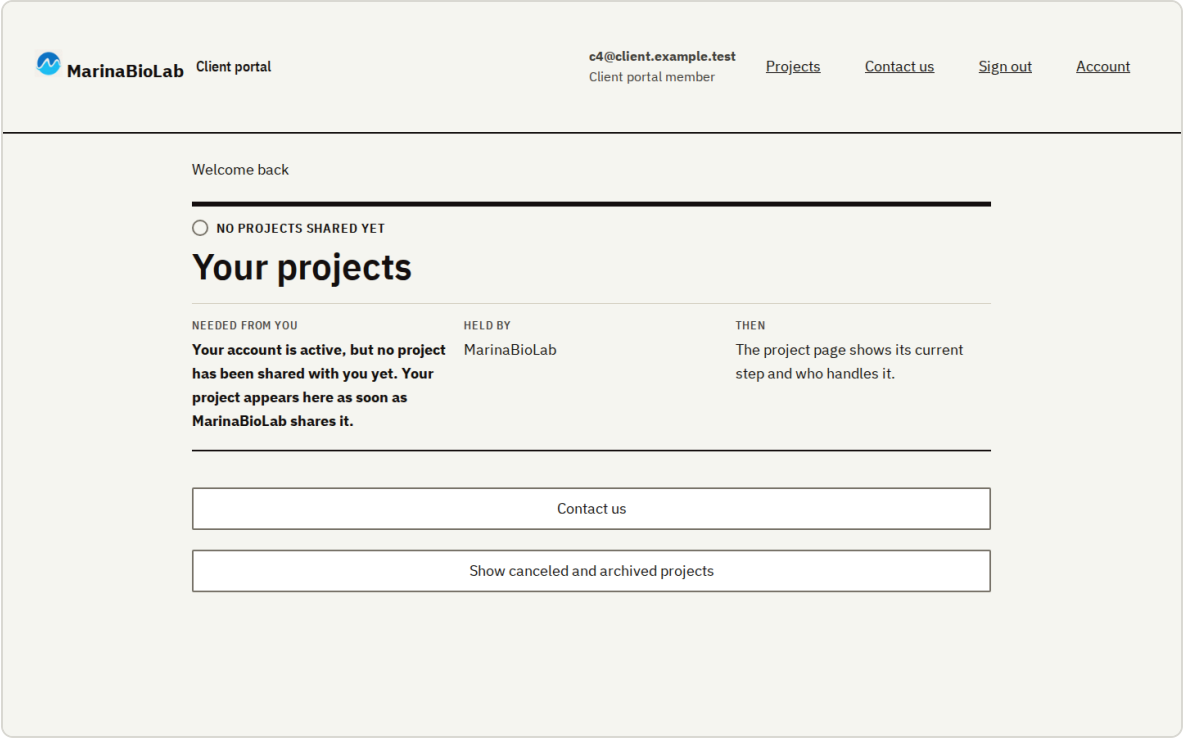
DO	In browser B, open C1's invitation link from B-05 again.
YOU SEE	The page reads **You already joined this project** and offers **Open your projects**.
STUCK?	Reload the page once and look again. If it still does not match, tick Fail, take a screenshot named after this step and go on to the next one.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-04 Test client The wrong account Portal

An invitation belongs to one address. Another person's account cannot use it.

DO	In browser B, stay signed in as C1. Open C3's invitation link.
YOU SEE	The page reads **Invitation unavailable**. It shows **Sign in with a different email** beside **Signed in with the wrong email?**
DO	Go to browser C, where C4 is still signed in from E-02. Select **Your projects**. If you closed that window, sign in to the portal as C4 again.
YOU SEE	The page reads **Your account is active, but no project has been shared with you yet.** C4 has no project at all, open or closed.
NOTE	C4 has a portal account because you invited it in E-02. Revoking the invitation did not remove the account.
CHECK FIRST	If the page reads **No project is open. Closed projects are under Show canceled and archived projects.** instead, write that in this step's note line.
STUCK?	Reload the page once and look again. If it still does not match, tick Fail, take a screenshot named after this step and go on to the next one.



E-04 What C4 sees: no project has been shared yet.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-05 Test client Roles decide what each person sees Portal

Each client role sees different things. A billing contact sees the payments. A signer does not.

DO Close browser C, where C4 is still signed in. Open a new private window.

DO Open C2's invitation link from B-03. Accept it as C2, as in B-05. Look at P1's tabs. Then open **Payments**.

NOTE P1 is C2's only project. After the invitation is accepted, the portal may open P1 directly instead of the list of projects. The same goes for C3.

YOU SEE For C2 (Billing contact): the tabs include Payments. Both payment rows read **Paid**. The totals read Total USD 1,000.00 and Paid USD 1,000.00.

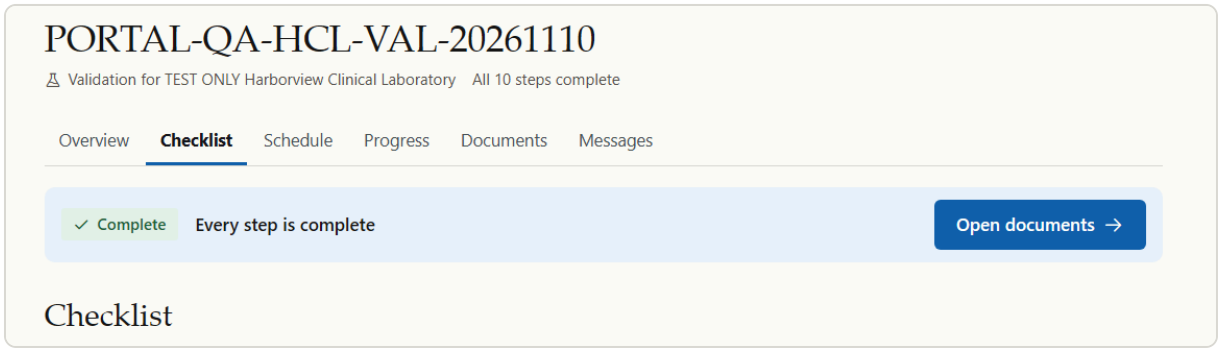
DO Close that window. Open a new private window. Accept C3's invitation the same way. Look at P1's tabs.

YOU SEE For C3 (Signer): no Payments tab. The tabs are Overview, Checklist, Schedule, Progress, Documents and Messages.

YOU SEE For both: Overview says that the validation is complete. The Checklist tab shows the checklist as signed.

NOTE P1 is complete by now, so no step waits for a signature or a payment. The lines a role sees on an open step do not show any more. That is expected.

STUCK? If you are not sure who is signed in, close browser C and open a new private window.



E-05 Signed in as C3, the Signer: no Payments tab. For C2 the tab Payments sits between Checklist and Schedule.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-06 Test client The report waits for payment Portal

Steps B-28 and B-29 already checked this. There is nothing new to do here.

DO Tick Pass for this step if B-28 (before the final payment) and B-29 (after it) both passed.

YOU SEE B-28 and B-29 both passed.

STUCK? If either of them failed, tick Fail for this step too.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-07 Admin + test client A financial hold blocks the report Console

A financial hold blocks the client's access to the report until Finance clears it.

WHERE	Browser A. Open P1, then project step 9, **Final payment**. The page is headed **Payment terms**. Further down the page, find **Financial holds, none active**.
DO	Open **Record an external notice and hold**. In **Payment**, choose Balance.
DO	Type TEST ONLY in **External source**. Type TEST-HOLD-001 in **External reference**. Enter the current time in **When it was observed (your local time)**. Type TEST ONLY hold check in **Reason**.
DO	Type F2's file name in **Evidence reference**. Type F3, which is F2's fingerprint, in **Evidence file fingerprint**.
DO	Check **I am responsible for Finance review of this notice.** Select **Record hold and block access**.
YOU SEE	The page reads **Financial hold recorded.** The hold is listed with the status **Access blocked**.
DO	Portal In browser B, signed in as C1, reload P1's Documents. Find the report under Not yet available.
YOU SEE	Portal The card **Your validation report** reads: This report is on hold while MarinaBioLab reviews the project's payments. Contact MarinaBioLab if you have a question. The card has no download button and no **Open payments**. Payments still reads paid in full.
DO	Go back to browser A. Open **Review and resolve an active hold**. **Active hold** and **Disposition** are already filled in, with the hold and False alarm verified. Leave them as they are. Type TEST ONLY: false alarm in **Finance reason**. Type F2's file name in **Finance evidence reference**. Type F3 in **Finance evidence file fingerprint**. Select **Record Finance resolution**.
YOU SEE	The page reads **Hold resolution recorded.** The hold reads Resolved. In browser B, open Documents again. C1's download works.
STUCK?	If C1 can still download the report while the hold reads Access blocked, tick Fail and take a screenshot. If C1 had Documents open before the hold, a download is refused with the same hold sentence in red.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-08 Admin An admin cannot sign a report Workbench

Only a Scientist may sign a report. Here you check that the workbench offers an admin no way to sign.

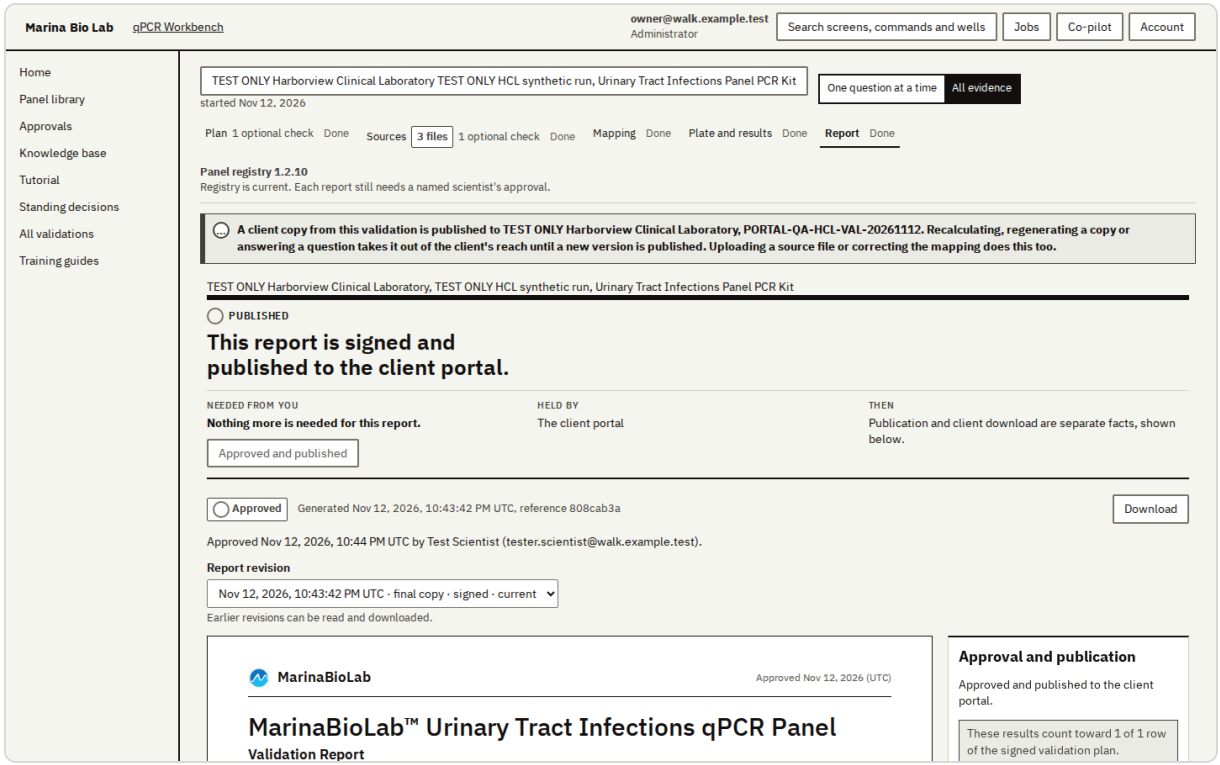
WHERE Browser A. Open the workbench at https://www.mblvalidation.com, signed in as yourself. Open TEST ONLY HCL synthetic run. Then open Report.

YOU SEE The report reads Approved, with the Scientist's name and the time. **Download** is offered. No button lets you prepare or sign a copy.

YOU SEE On the workbench Home, the validation is not listed under **Needs you**.

NOTE A stronger check works only while the report is not signed, just before B-25. The note in B-25 describes it. If you did it then, write down what you saw. You should have seen no **Sign the final copy** button. You should have seen the words **Only a scientist can sign.**

STUCK? If the workbench lets you sign anything, tick Fail, take a screenshot and tell the owner.



E-08 The signed report as an admin sees it.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-09 **Scientist** One client copy per run **Workbench**

The workbench makes one client copy per results run. Once a run has its copy, the workbench offers no way to ask for a second one.

WHERE Browser S, signed in to the workbench as the Scientist. Open TEST ONLY HCL synthetic run. Then open Report.

DO Find the card **Report audience** in the panel on the right. You may have to scroll the panel.

YOU SEE The card reads Client copy. It says that this is the copy the client receives in the portal. It has no **Generate client copy** button.

STUCK? If **Generate client copy** is offered, do not select it. Tick Fail and take a screenshot.



E-09 Report as the Scientist sees it, with the card Report audience.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

E-10 Admin Completing a project step by hand warns first

Console Check first

The console lets an admin finish a project step by hand, but it must warn first.

NOTE	You do this step during C-01, after P2 is switched on and before C1 signs its proposal. Once the proposal is signed, the button is gone.
WHERE	Browser A. Open P2. Open **Choose a step or project details**, then **All steps and overrides**.
DO	In the table, find the row Proposal signed. That row has the button **Complete (records no signature)**. Read the warning under the button.
DO	Do not select the button. Type nothing in **Reason for completing a step (audited)**.
YOU SEE	The warning reads: **This records no signature. The initial payment step does not open by itself, and a signature made after this does not open it either.**
CHECK FIRST	The button and this warning should show while P2's proposal is not signed. Write down whether you saw them.
STUCK?	If the row Proposal signed reads Done and has no button, the proposal is already signed. Tick Not run and say so in the note line.

☐ Pass ☐ Fail ☐ Not run Note

E-11 Test client A signed-out visit to a project address

Portal

A project's page in the portal must never show to someone who is not signed in.

DO	Open a new private window. Do not sign in. Type P1's portal address in its address bar. The address ends in /v2/p/<project>/overview. Copy the <project> part from the address bar in browser B.
YOU SEE	The portal's sign-in page opens. The project never shows.
STUCK?	Reload the page once and look again. If it still does not match, tick Fail, take a screenshot named after this step and go on to the next one.

☐ Pass ☐ Fail ☐ Not run Note

CHECKPOINT

If every step in E matched, the sites refused everything they should. You are done with E. Only the cleanup, Scenario F, is left.

SCENARIO F

Cleanup

In this last scenario you close everything the test opened. Then you check that Today looks as it did at the start. This is a practice run, and the steps here are its whole cleanup (question Q5). Nothing is deleted: every record stays in the audit trail, the console's permanent history.

You are here	You finished E. This is the last scenario.
Time	About 20 minutes.
Steps	6, from F-01 to F-06

F-01 Admin Revoke what is still open

Console

An open invitation can still be accepted. So you revoke every one that is left.

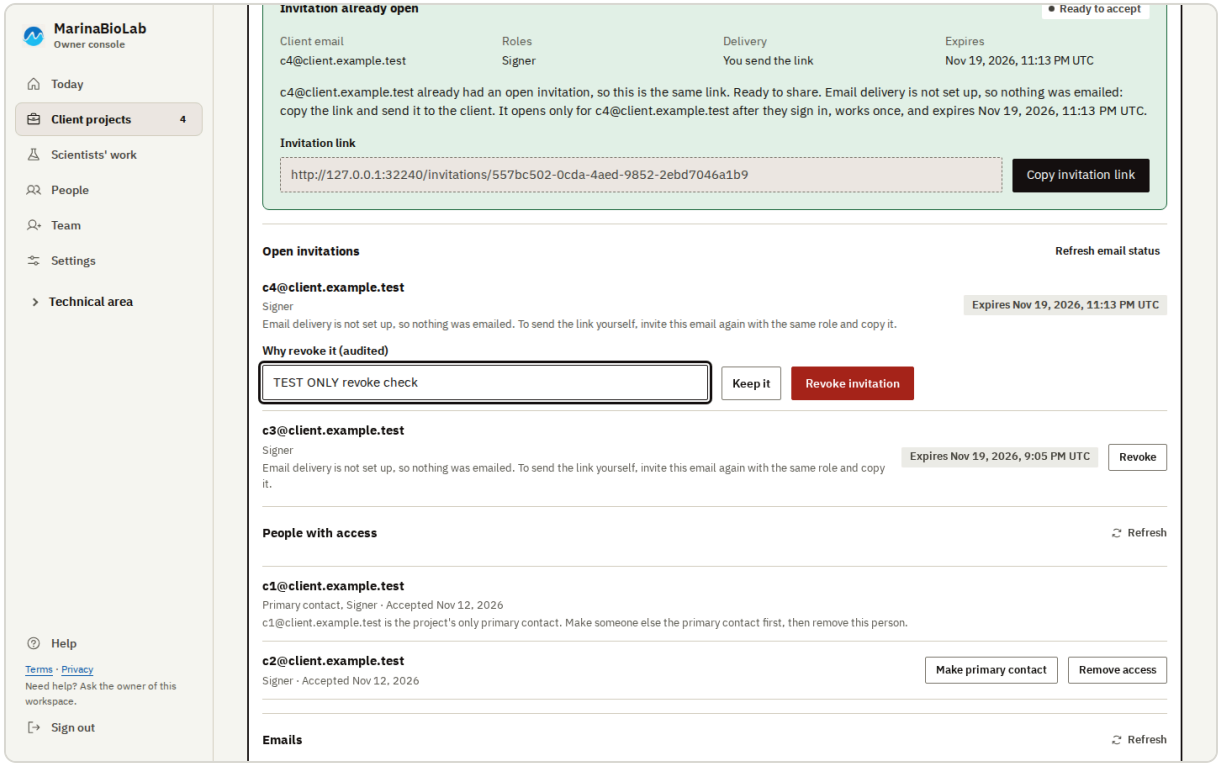
WHERE Browser A. Open P1, P2 and P3 in turn. In each project, open **Choose a step or project details**, then **Client access**.

DO Work through the rows under **Open invitations**, one row at a time. On the row, select **Revoke**. Type TEST ONLY: end of practice run in **Why revoke it (audited)**. Select **Revoke invitation**. Repeat until no row is left.

YOU SEE After each revoke, a line names the address and ends with **The link no longer works.** That row is gone. On P1, expect a row for your Scientist address too, if you used the Stuck? way in A-07.

NOTE A project with no open invitation does not show the heading Open invitations at all. Then there is nothing to do on that project.

STUCK? **Revoke invitation** stays switched off until you type a reason. To leave a row as it is, select **Keep it**.



F-01 The reason typed, before Revoke invitation.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

F-02 Admin + test client Cancel, then archive

Console Check first

Canceling and archiving take the test projects out of everyone's lists without deleting them.

WHERE Browser A. You do this for each test project in turn, in the order below. In the project, open **Choose a step or project details**, then **Team and activation**. At the foot of the page, open **Cancel or archive this project**.

DO Start with P2. It is still active, so it offers only **Cancel project**. Type TEST ONLY: end of practice run in **Reason (recorded)**. Select **Cancel project**. A window asks before the project is canceled. Select **Cancel project** again in that window.

YOU SEE **Project canceled.** The reason box is empty again, and the button now reads **Archive project**. The box at the top of P2 says that the project is closed and that no one holds it.

NOTE The form offers a usual reason, on a button that begins **Use the usual reason**. Do not use it. Type the TEST ONLY reason instead.

DO Stay on the same project. Type the same reason again in the reason box. Select **Archive project**. Then select **Archive project** again in the window that opens.

DO Now do P1, then P3. Both are completed, so they offer only **Archive project**. On each, type the reason and archive the project the same way.

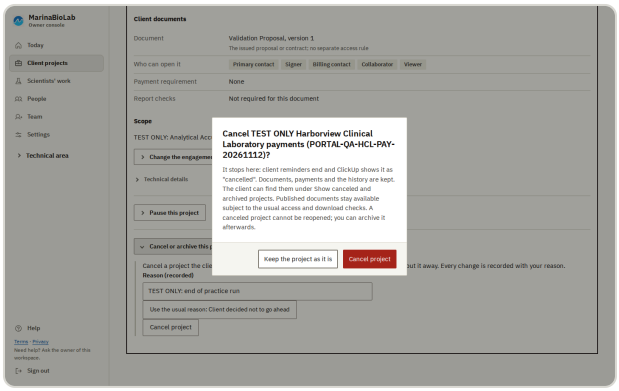
YOU SEE After each archive: **Project archived.** The button then reads **Restore project**. Do not select it.

DO Portal In browser B, as C1, open **Your projects** and reload the page.

YOU SEE Portal No project is listed. Under the text is the box **Show canceled and archived projects**. Check that box. Each project then shows as closed, with **Open project**.

CHECK FIRST An archived project is not read only for the client. Open a project from that list. It is marked Closed. Its documents still download. Overview still shows the block with 2 actions for you to record. Messages still offers **Send message**. The owner chose to keep it so. Send no message and fill in no form there. On P1, try **Download PDF**. Write in the note line whether it still works.

STUCK? To leave either window without canceling or archiving, select **Keep the project as it is**. If **Archive project** is switched off, the reason box is empty. Type the reason.



F-02 The window that asks before P2 is canceled.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

F-03 Scientist Archive the test validation Workbench

The test validation should leave the workbench's Home list too.

WHERE Browser S, as the Scientist. Open the workbench's Home page.

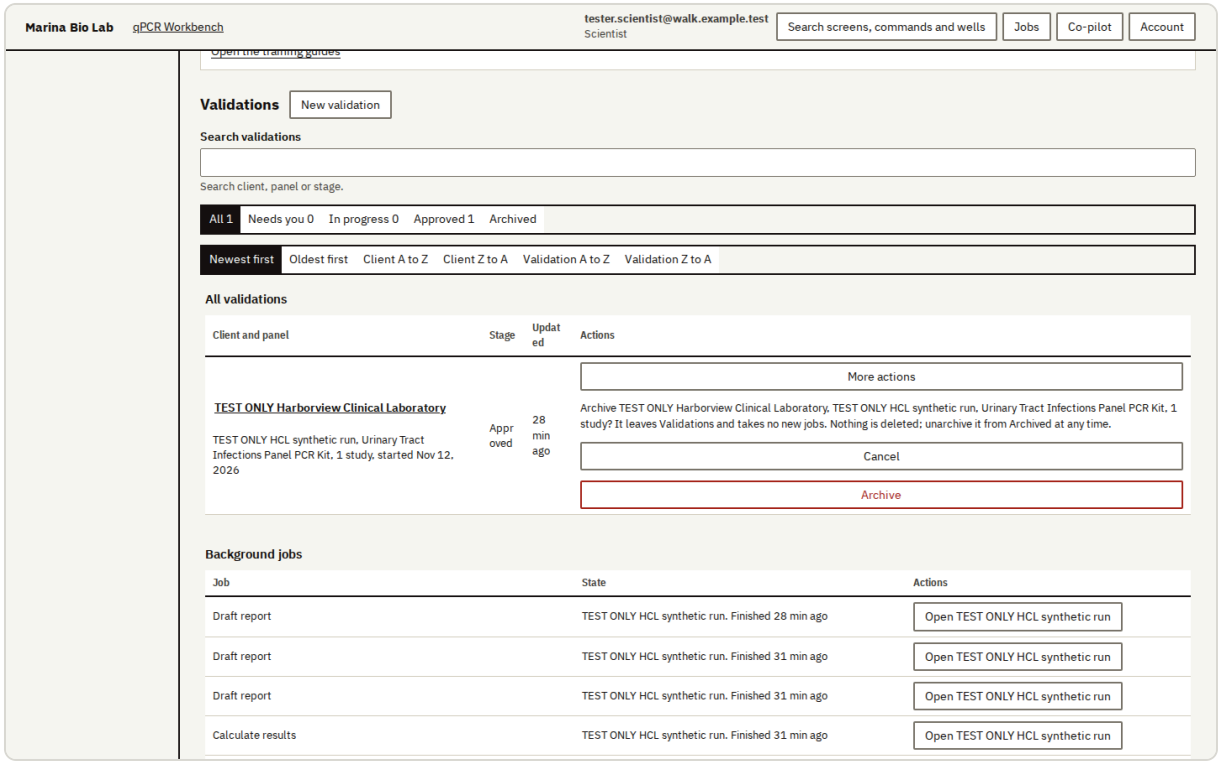
DO Under Validations, find the row of TEST ONLY HCL synthetic run. At the end of that row, select **More actions**. In the menu that opens, select **Archive**.

DO A question opens in the row. It says that nothing is deleted. Select **Archive** again.

YOU SEE A message says that the validation is archived and is listed under Archived. The validation leaves Home's list. To see it again, choose Archived in **Filter validations**. It is listed there, so nothing is deleted.

NOTE You can do this in the console instead, as the admin. Under Scientists' work, select **Archive** on the validation's row, then **Confirm archive**. The reason there is optional.

STUCK? If the validation is not on Home, choose Archived in **Filter validations**. If it is listed there, it is already archived.



F-03 The question in the row, after Archive in the menu.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

F-04 **Admin** What stays on record **Console**

Some records stay on purpose. This step lists them, so that you do not look for a way to remove them.

YOU SEE These stay. Do not try to remove them: the audit trail entries, the signed proposal, plan, checklist and contract, the recorded payments, refund, waiver and hold, the published report, the help request and its answer, the pause and resume of P2, the ended Finance owner role and, if D-12 published one, the welcome document.

NOTE A person removed with **Remove access** cannot be invited to the same project again. So this test removes nobody.

NOTE Your Scientist account and the test clients' accounts stay too. The next test can use the same addresses. If the owner wants the Scientist account closed, open Team and select **Turn off access** on that account's row.

NOTE Archived test projects still show in Client projects, but only with both **Show test projects** and **Show archived and canceled** turned on.

STUCK? There is nothing to do on a site here. Tick Pass once you have read the list.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

F-05 **Admin** Today is as it was **Console**

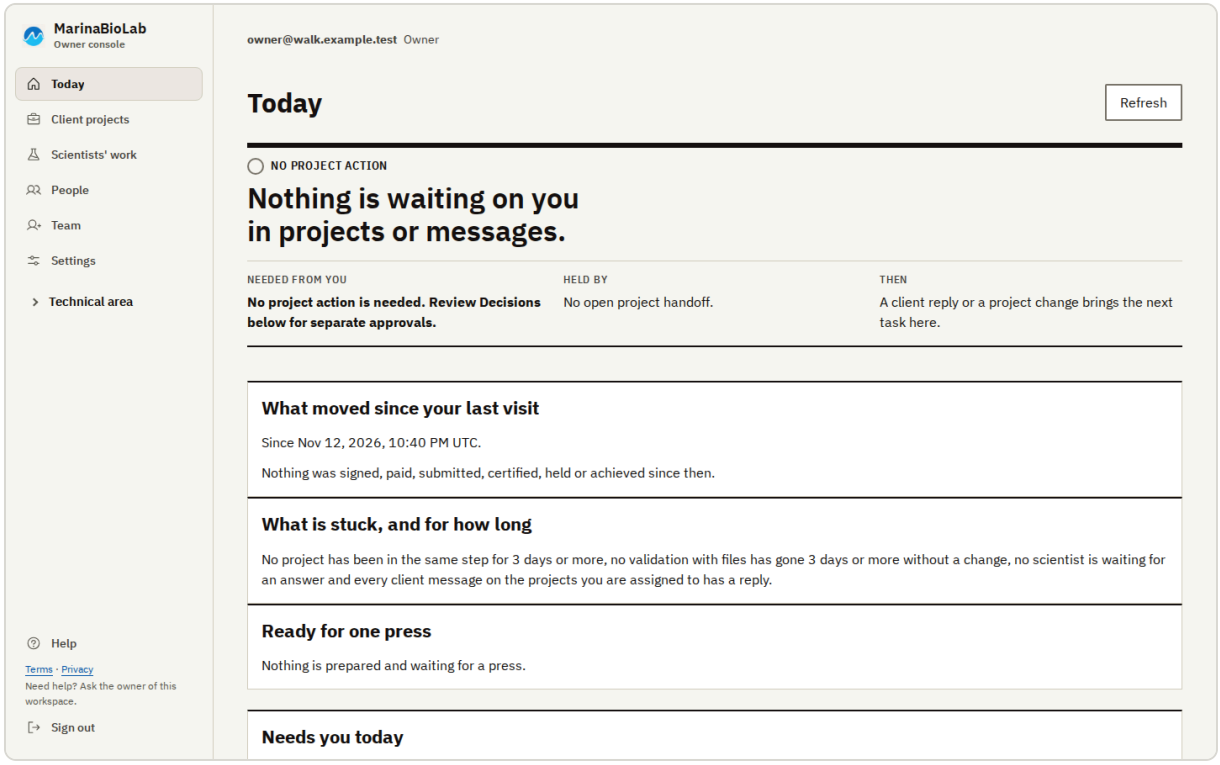
The test should leave no trace on the lab's everyday screens.

WHERE Browser A. Open **Today** first, then **Client projects**.

YOU SEE On Today, no box, block, card or count mentions TEST ONLY or PORTAL-QA-. No TEST ONLY help request is open. All four counts under **At a glance** match the counts you wrote down at A-02. Test projects and their runs are left out of the counts.

YOU SEE On Client projects, no test project shows. The switches **Show test projects** and **Show archived and canceled** are still offered. Turn both on. The three test projects then show as closed.

STUCK? If a test project still shows with both switches off, do F-02 again for that project. If a count is higher than at A-02, write down which count.



F-05 Today after the cleanup on the practice copy. Your lab's blocks, cards and counts are different.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

F-06 Admin The test log

Console

The owner reads the results sheet to decide what needs fixing.

DO	Fill in the results sheet at the end of this guide: the date, the testers, each scenario's result with its notes, the project identifiers, and anything that did not match this guide.
DO	Sign the sheet. Send it to the owner, with a screenshot of every failed step.
YOU SEE	The results sheet is complete and signed.
NOTE	No site shows a release number. Ask the owner which release was live on the test day. Take the three project identifiers from the test data sheet: after F-02 the console no longer lists the projects.
STUCK?	There is nothing to do on a site here. If you cannot fill in a line of the sheet, leave it empty. Write the reason under Failures and differences.

☐ **Pass** ☐ **Fail** ☐ **Not run** Note

CHECKPOINT

If every step in F matched, the test is finished. Fill in the results sheet and send it to the owner.

RECORD

Results sheet

Fill this in as you go. At the end, sign it and send it to the laboratory's owner, with the screenshot of every step you marked Fail.

Date of the test	
Tester	
Other people	
Release (ask the laboratory's owner)	
P1 identifier	
P2 identifier	
P3 identifier	

R.1

Result per scenario

Scenario	Steps	Passed	Failed	Not run	Notes
Scenario A Setup	11				
Scenario B The full validation path on P1	44				
Scenario C Payments on P2	10				
Scenario D A lab build on P3	13				
Scenario E Negative checks	11				
Scenario F Cleanup	6				
All scenarios	95				

R.2

Step log

Copy the box you ticked in each step: P for Pass, F for Fail, NR for Not run.

Scenario A

A-01	☐ P	☐ F	☐ NR
A-02	☐ P	☐ F	☐ NR
A-03	☐ P	☐ F	☐ NR
A-04	☐ P	☐ F	☐ NR
A-05	☐ P	☐ F	☐ NR
A-06	☐ P	☐ F	☐ NR
A-07	☐ P	☐ F	☐ NR
A-08	☐ P	☐ F	☐ NR
A-09	☐ P	☐ F	☐ NR
A-10	☐ P	☐ F	☐ NR
A-10a	☐ P	☐ F	☐ NR

Scenario B

B-01	☐ P	☐ F	☐ NR
B-01a	☐ P	☐ F	☐ NR
B-02	☐ P	☐ F	☐ NR
B-03	☐ P	☐ F	☐ NR
B-04	☐ P	☐ F	☐ NR
B-05	☐ P	☐ F	☐ NR
B-06	☐ P	☐ F	☐ NR
B-07	☐ P	☐ F	☐ NR
B-08	☐ P	☐ F	☐ NR
B-09	☐ P	☐ F	☐ NR
B-10	☐ P	☐ F	☐ NR
B-11	☐ P	☐ F	☐ NR
B-12	☐ P	☐ F	☐ NR
B-13	☐ P	☐ F	☐ NR
B-14	☐ P	☐ F	☐ NR
B-15	☐ P	☐ F	☐ NR
B-16	☐ P	☐ F	☐ NR
B-17	☐ P	☐ F	☐ NR
B-17a	☐ P	☐ F	☐ NR
B-18	☐ P	☐ F	☐ NR
B-19	☐ P	☐ F	☐ NR
B-20	☐ P	☐ F	☐ NR
B-21	☐ P	☐ F	☐ NR
B-21a	☐ P	☐ F	☐ NR
B-21b	☐ P	☐ F	☐ NR
B-22	☐ P	☐ F	☐ NR
B-23	☐ P	☐ F	☐ NR
B-23a	☐ P	☐ F	☐ NR
B-23b	☐ P	☐ F	☐ NR
B-23c	☐ P	☐ F	☐ NR
B-23d	☐ P	☐ F	☐ NR
B-23e	☐ P	☐ F	☐ NR
B-24	☐ P	☐ F	☐ NR
B-24a	☐ P	☐ F	☐ NR
B-24b	☐ P	☐ F	☐ NR
B-24c	☐ P	☐ F	☐ NR

Scenario C

C-01	☐ P	☐ F	☐ NR
C-02	☐ P	☐ F	☐ NR
C-03	☐ P	☐ F	☐ NR
C-04	☐ P	☐ F	☐ NR
C-05	☐ P	☐ F	☐ NR
C-06	☐ P	☐ F	☐ NR
C-07	☐ P	☐ F	☐ NR
C-08	☐ P	☐ F	☐ NR
C-09	☐ P	☐ F	☐ NR
C-10	☐ P	☐ F	☐ NR

B-25	☐ P	☐ F	☐ NR	
B-26	☐ P	☐ F	☐ NR	
B-27	☐ P	☐ F	☐ NR	
B-28	☐ P	☐ F	☐ NR	
B-29	☐ P	☐ F	☐ NR	
B-30	☐ P	☐ F	☐ NR	
B-31	☐ P	☐ F	☐ NR	
B-32	☐ P	☐ F	☐ NR	

Scenario D

D-01	☐ P	☐ F	☐ NR
D-02	☐ P	☐ F	☐ NR
D-03	☐ P	☐ F	☐ NR
D-04	☐ P	☐ F	☐ NR
D-05	☐ P	☐ F	☐ NR
D-06	☐ P	☐ F	☐ NR
D-07	☐ P	☐ F	☐ NR
D-08	☐ P	☐ F	☐ NR
D-09	☐ P	☐ F	☐ NR
D-10	☐ P	☐ F	☐ NR
D-11	☐ P	☐ F	☐ NR
D-12	☐ P	☐ F	☐ NR
D-13	☐ P	☐ F	☐ NR

Scenario E

E-01	☐ P	☐ F	☐ NR
E-02	☐ P	☐ F	☐ NR
E-03	☐ P	☐ F	☐ NR
E-04	☐ P	☐ F	☐ NR
E-05	☐ P	☐ F	☐ NR
E-06	☐ P	☐ F	☐ NR
E-07	☐ P	☐ F	☐ NR
E-08	☐ P	☐ F	☐ NR
E-09	☐ P	☐ F	☐ NR
E-10	☐ P	☐ F	☐ NR
E-11	☐ P	☐ F	☐ NR

Scenario F

F-01	☐ P	☐ F	☐ NR
F-02	☐ P	☐ F	☐ NR
F-03	☐ P	☐ F	☐ NR
F-04	☐ P	☐ F	☐ NR
F-05	☐ P	☐ F	☐ NR
F-06	☐ P	☐ F	☐ NR

R.3

Failures and differences

Step	What you saw instead	Screenshot file

R.4

Sign-off

I ran these steps with test data only. The results are as I recorded them.

Tester's name

Signature

Date

I have read these results and the failures listed above.

Reviewer's name

Signature

Date

REFERENCE

Troubleshooting

What to do when a step does not go as written. Messages in bold are quoted exactly as the screen shows them.

T.1

When a step fails

1. Tick Fail on the step. In the note line, write what the screen showed in place of what the step's You see line describes.
2. Take a screenshot and name the file after the step, for example `B-10-fail.png`.
3. Reload the page once. Look for your change before you repeat anything. Several messages in the table below mean that the change may already be saved.
4. Decide whether later steps need this one. For example, nothing after B-07 works without a signed proposal. If later steps need it, stop the scenario and tell the owner. If they do not, go on with the next step.

T.2

Problems you may meet

What you see	Steps	What it means	What to do
No sign-in email arrives for a test client	B-05, E-04	The email goes to the address you typed. The sites send at most one sign-in email a minute to an address, and at most 30 an hour in total.	Wait a minute, then ask for the sign-in email once more. If it still does not arrive, look in Junk Email and check the spelling of the plus address. Then test the plus address as in Start here, section 6. If that test email does not arrive either, tell the owner.
This account does not have access to the owner console. Sign in with an owner email.	A-01, E-01	The account exists, but its address is not on the console's access list. In E-01 this is the result you want.	In A-01, check the spelling of your address. If it is right, tell the owner.
P1, P2 or P3 is missing from Client projects	A-05, C-07	Test projects are hidden from the normal list.	On Client projects, turn on **Show test projects**. After F-02, also turn on **Show archived and canceled** (see F-04).
A test project shows on Today	A-02, F-05	Today should leave test projects out.	Tick Fail and take a screenshot.

What you see	Steps	What it means	What to do
The invitation card shows **Waiting for email** and no email comes	B-03, E-02	The email was not sent, for example because the address is not at marinabiolab.com.	Wait 15 minutes, then invite the same address again. The card then offers **Copy invitation link**.
Mail is not switched on yet, so no email is sent. Emails wait in the queue until it is.	B-03	The lab's outgoing email is off, so no invitation email goes out.	Select **Copy invitation link**. Then open the copied link yourself in the client's browser.
Invitation unavailable	B-05, E-02, E-04	The invitation was revoked, has expired or was replaced, or the browser is signed in with another address. In E-02 and E-04 this is the result you want.	In B-05, select **Sign in with a different email** and sign in with the invited address. If the message stays, invite the same address again.
The project is not active. Activate it under Team and activation first.	B-19, B-27, D-13	A project step cannot be completed while the project is a draft.	Finish B-04 (or D-04 for P3), then come back to the step.
Set up and activate stops, or reads **Not available yet**	B-04, D-04	A staff member has never signed in, your own address holds no role, or no notification template is published.	Read the red box. It says what was recorded and what the server refused. If a staff member has never signed in, do A-08. If your own address holds no role, give it a free role as in A-09. Then press the button again. If the button reads Not available yet, use the older forms in the Stuck? line of B-04.
The page says no invitation was created because the address has no sign-in account yet	A-07	The server is not set up to make sign-in accounts.	Follow the Stuck? line of A-07.
This project's workflow needs this role, so it cannot be left empty. Hand it to another active staff member instead.	A-10a	You chose Nobody on a required role.	End the Finance owner role, as the step says.
Read only: this account can view the follow-ups but cannot record decisions.	B-13	You are not on P1's staff.	Add yourself under Team and activation, as in A-09. Then select **Refresh**.
The client cannot pay online yet: the signed proposal has no Shopify order prices.	B-09, B-10	Expected in this test: B-01 clears the Shopify prices, so the client pays by wire.	Record the payment by hand, as in B-10. Do not start a change order to add prices.

What you see	Steps	What it means	What to do
Terms changed since you started: review before recording.	B-10, C-02 to C-07	The payment terms changed after you opened the form, for example because the same payment was recorded in another window.	Read the listed changes. Then either select **I have reviewed the changes** and save again, or close the form.
Waive is not on the Balance row	C-06	Waive shows only on a final payment that is still owed, has no refund on it and has no waiver waiting.	Write the status of the row in the note line. Mark the step Fail or Not run.
You are offered no approval for the waiver	C-06	Expected: the person who asked for the waiver cannot approve it.	The second admin approves it in C-07.
Only the people on the countersigner list can countersign. Ask one of them to sign in and countersign.	D-07	Your address is not on the countersigner list.	Ask a person on the countersigner list to sign in and countersign.
P1 is not in the window **Create a new validation**	B-21	P1 is not active and has no issued proposal yet.	Finish B-02 and B-04 in the console, then open the window again.
You are not assigned to this project. Ask your lab owner or an admin to add you to its team.	B-20	Your Scientist address is not on P1's staff.	In the console, add that address as Validation scientist, as in A-09.
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.	B-24c, B-25	The account has no printed name on record.	Ask the owner to open **Team** in the console and select **Set printed name** on your Scientist row. The owner types the name in **Printed name (as it will print on signed reports)** and a reason in **Reason (recorded)**, then selects **Save printed name**. After that, sign again with that name.
Only a scientist can sign. or **Only a scientist can prepare and sign the final copy.**	B-24c, B-25, E-08	You are preparing or signing while signed in as an admin. In the extra check of E-08 this is the result you want.	In B-24c and B-25, sign in to browser S with your Scientist address.
This results run already made its client copy, so nothing new was queued.	B-24a	Each results run makes one client copy.	In B-24a, read the client copy that already exists.

What you see	Steps	What it means	What to do
Recalculate cannot run, and the page says why	B-23c, B-24	A decision that holds results back is still open, or the Equipment and kit record is still waiting.	Finish B-22, B-23a, B-23b and B-23d. Then select **Recalculate** on Plate and results.
The **Equipment and kit record** reads Needs decision again	B-23d, B-24	Something the record depends on changed, such as the plan or the files. Its last answer is already filled in.	Select **Record the equipment and kit record** again. Then recalculate.
The final copy is refused, and the message names sections or a study	B-24c	The client copy would print nothing under those sections, or the study has no results summary or conclusion.	Write the missing text in B-24b. If the message names Reference Organisms, do B-21b, then do B-24 and B-24a again.
Published, client download paused	B-26	Expected while the final payment is owed or a hold is active.	Go on with the next step. B-29 records the final payment, and the download then opens.
The client's download stays refused after B-29	B-29, E-07	A payment is still owed, or a financial hold is active.	On P1's Payment terms, look for a row that does not read Paid. Look for an active hold too. E-07 shows how to resolve a hold.
You cannot record the meeting or visit outcome	B-16, B-19	An outcome can be recorded only after the event's end time.	Wait until the end time has passed. Then reload the page and try the step again.
The server did not confirm this change. Refresh to see whether it was saved before you try again.	Any console step	The change may or may not be saved. Nothing is sent again by itself.	Select Refresh or reload the page. Look for the change. Try again only if the change is not there.
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.	Any workbench step	The workbench cannot tell whether your change was saved.	Wait for the page to refresh. Look for your entry. Repeat it only if the entry is not there.
The screen does not match the picture	Any step	The pictures come from a private copy of the sites with made-up data. Names, addresses, amounts, dates and some banners differ from the live site.	Judge the step by its You see line, not by the picture. In the note line, write any real difference in a label or in how the screen behaves.