CEQAS
Cytogenomic External Quality Assessment Service

Website User Guide

CEQAS is a member of the
UK NEQAS
Consortium

The CEQAS website – www.ceqas.org – consists of two parts:

- The static (public) website containing general information about the Scheme

- The login protected participants' website (Management System) giving access to laboratory details and EQAs

This is a guide for the use and navigation of the Management System. It is intended for use by laboratory staff involved with EQA.

**Please note that a separate user guide will be available for online EQAs**

The Management System (MS) enables participants to enrol for EQAs, submit EQA results, and view and download Individual Laboratory Reports (ILRs), summary documents and participation and performance certificates. The MS also allows users to add extra staff, change passwords and laboratory details, and track invoice records.

The MS can be accessed from a web browser from the CEQAS home page, using the URL http://www.ceqas.org/.

1   LOGIN

Once your registration has been accepted you will have been issued with login details allowing you to access the 'participants only' part of the website. You can always contact the Scheme Office (ceqas-info@ouh.nhs.uk) to request new login details.
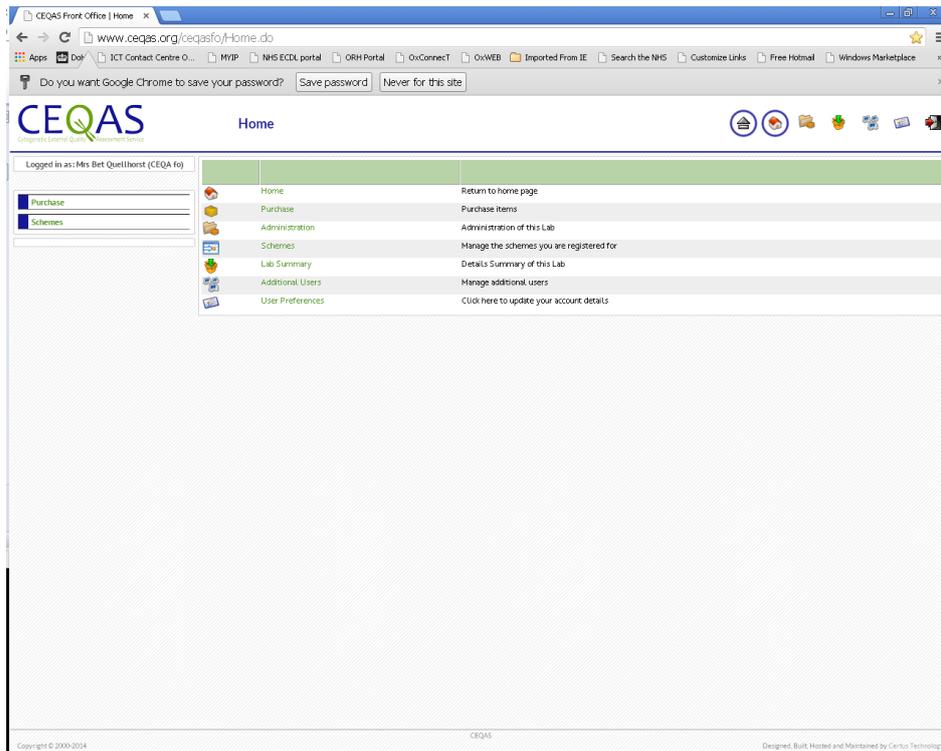
Figure 1 – Login page – www.ceqas.org
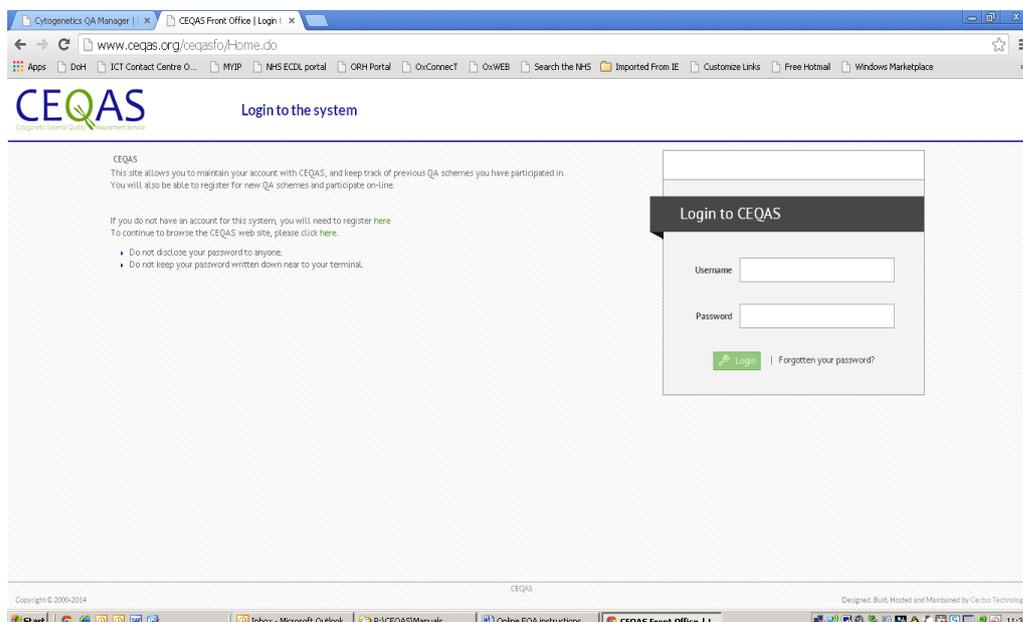
You will then see the System Home Page, showing menu item

Figure 2 – Home page

1.1   A NOTE ON NAVIGATION

Administrative menu options appear as icons to the top right of each screen. The main EQA menu items (Purchase and Schemes) appear at the head of the left hand column of the page. For the sake of clarity, a menu option is only displayed if you have permission to use at least some of the functionality provided by it.

At any time, you may use the menu items to move to the appropriate system component. If you do this having made changes on a page, these changes will be lost - it is equivalent to leaving the page using the 'Cancel' option.

Within a page, sub-menus appear in the left hand column. Once again, these can be used at any time to move to the associated page.

The system is a web-based database. Entering data on a web page will not update the database until a 'Save' action is initiated. This is done using buttons. It is common to initiate a save when leaving a page, but this is not always the case. There are four basic buttons used on pages:

Save/Complete/Apply   Initiate a database save and leave the current page.

Cancel   Leave the current page without initiating a database save.

1.2   THE HOME PAGE

You can return to the home page at any time using this icon.

1.3   YOUR OWN USER PREFERENCES

From this page you can manage your own user details. Two submenus will appear in the left margin of the page:

Change Account   You will be able to change your account details, such as your email address. To do this, make the change and press "Update". You will also be able to set the number of table rows which appear in listings for all pages. To do this, change the default "{Not Set}" to a value such as 25 and press "Save".

Change Password   It is recommended that you change your password regularly. It is possible for CEQAS to enforce periodic password change, but this feature is currently not activated.

1.4   LEAVE THE SYSTEM

You can log out from the system at any time using this icon.

2   ADMINISTRATION FUNCTIONS

Users with administration rights (Primary Contacts) can access a number of administrative functions, including purchasing of EQA schemes (see 2.4), creating additional users (see 2.1) and changing laboratory registration details (see 2.2).

If the Primary Contact of your laboratory changes please contact the Scheme Office who will arrange for the contact details of the new Primary Contact to be added to the system. Please do NOT alter the user details for the Primary Contact yourself.

2.1   ADDITIONAL USERS

Initially, you will have been invited to give the details of up to two users of the system for your laboratory. The associated user accounts are usually created with administration rights - including the right to raise a purchase order for an EQA. You may add additional users (maximum 10 people per laboratory). By default, these extra accounts will allow the users to view past submissions for an EQA and submit documents for an EQA - but not, for example, to perform purchasing actions. If you wish to authorise any of your staff to have system rights for purchasing and result submission, please contact the Scheme Office.

If your Primary Contact changes due to staff changes, please contact the Scheme Office who will arrange for the contact details of the new contact to be added to the system and the obsolete details to be taken off the system.

2.2   LABORATORY SUMMARY (REGISTRATION DETAILS)

The details you gave when registering for CEQAS are available (and editable) on this page, together with the laboratory number allocated to you. You are particularly requested to keep your contact information up to date.

2.3   ADMINISTRATION (ORDERS AND INVOICING)

The *Administration* menu allows the Primary Contact to purchase membership of any available EQA scheme. In this administrative component the Primary Contact can manage orders, invoicing and your account ledger.

2.4   ENROLLING IN EQAS

The Purchase menu item is found at the head of the left hand column of each page allows you to enrol in EQAs. Each available EQA has a defined registration period during which you can enrol. Only EQAs in which you are not already enrolled and which currently have an open enrolment will be listed in the catalogue.

Figure 3 - Catalogue of EQAs available for enrolment

If you click 'Enrol' for a particular EQA, an enrolment screen appears:

Figure 4 - Enrolling in an EQA

You may set a PO number and complete the purchase order. The invoices will be raised in the CEQAS office system. Once your enrolment has been accepted, you will be able to participate in the chosen EQA(s).

If you do not wish to enrol in this particular EQA after all, click 'Remove' next to the selected EQA. To finalise your enrolment, click 'Complete'. To cancel an enrolment after you have finalised it, please contact the Scheme Office (ceqas-info@ouh.nhs.uk).

Details of the different EQAs available (e.g. sample distribution, online analysis), number of cases and the timetable can be found on the CEQAS static website.

3   EQA PARTICIPATION

The EQA menu item is at the head of the left hand column of each page. This will take you to a summary page where you can see the status of each EQA for which you are enrolled:

Figure 5 - Schemes page, showing status of each EQA for which you are enrolled

For each EQA, the dates of the next activity for the lab will be highlighted (if any). In the example, the CEQAS online EQA 2014 has no further activities for the lab to complete the EQA. The link in the first column allows EQA details to be viewed. If we inspect the details of the EQA we find the following:

Figure 6 - EQA detail, showing activities
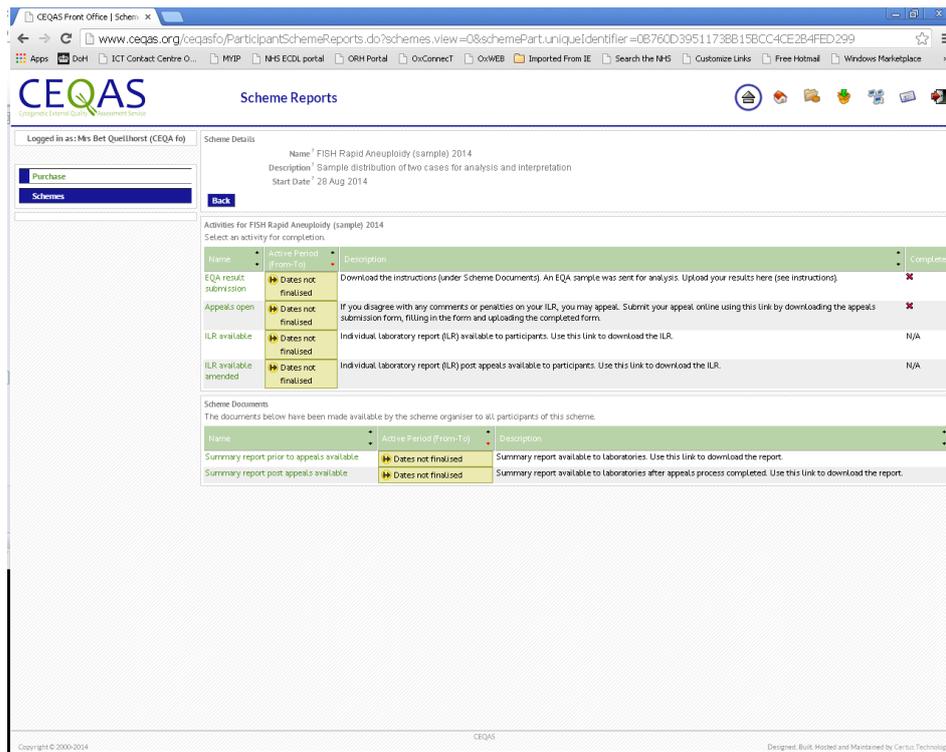
The information is of two types: EQA activities and EQA documents.

3.1   EQA ACTIVITIES

All activities to be undertaken by the lab within the EQA are listed, together with their start and end dates. Colour coding is used to highlight an activity's status: red for a closed activity (one completed in the past); green for an open (ongoing) activity - for which the number of days left is highlighted as well as the relevant dates; and yellow for a future (upcoming) activity. A lab can only engage in open activities. This is done by following the link in the name column of the listing.

Forms are in RTF format, so you will need suitable software (such as Open Office or Microsoft Word) which can handle RTF. The software you choose should support RTF bookmarks and form field locking (the basic Mac OS tool does not).

download a form   Click on the form icon, to the right of the coloured dot. Choose to download a form. If red, you can only download a form; it is automatically filled in with the EQA details and your lab number. Save the form to your computer and use your word processor to view and/or complete it. When saving, do not change the .rtf file name extension to another file type (e.g. .doc). You will not be able to upload a form as anything other than an .rtf file. If the icon is green, then you have already uploaded the form; you can download the form to view it.

upload a form   Once you have filled in the template submission form you need to upload the completed form. Again click on the form icon, to

the right of the coloured dot. Browse for the file on your computer's file system and select the file to upload. The system will check that you are uploading a valid form (file name extension .rtf) for that scheme and case. The icon button will change to green when you next enter this page or when you refresh the webpage by pressing the Refresh button.

add an attachment   This is used for uploading Laboratory documents, NOT submission templates. Click on the icon to add an additional attachment (most file formats are accepted). Once uploaded the attachment will be listed on the screen. Please give your attached documents concise names before uploading them (e.g. referral form A261/07, report A261/07, summary of additional tests A261/07). Files > 1MB will be very slow to upload. It is recommended you either scan large files at a low resolution, save the file as a PDF or save it as a zip file. Alongside each attachment is a red cross; if you mistakenly upload the wrong attachment you can click on this cross to remove it.

upload a report   This is used for the submission of laboratory generated reports as opposed to submission forms. Reports **must** be in a .pdf format. Select 'EQA result submission' from the menu. A dialogue box will appear. You can submit by dragging your report into the field provided or use the link to upload your report from your computer. **Please note:** If your report is not in English, please select the language you are submitting in from the dropdown menu.

Figure 7 - Language options for report submission
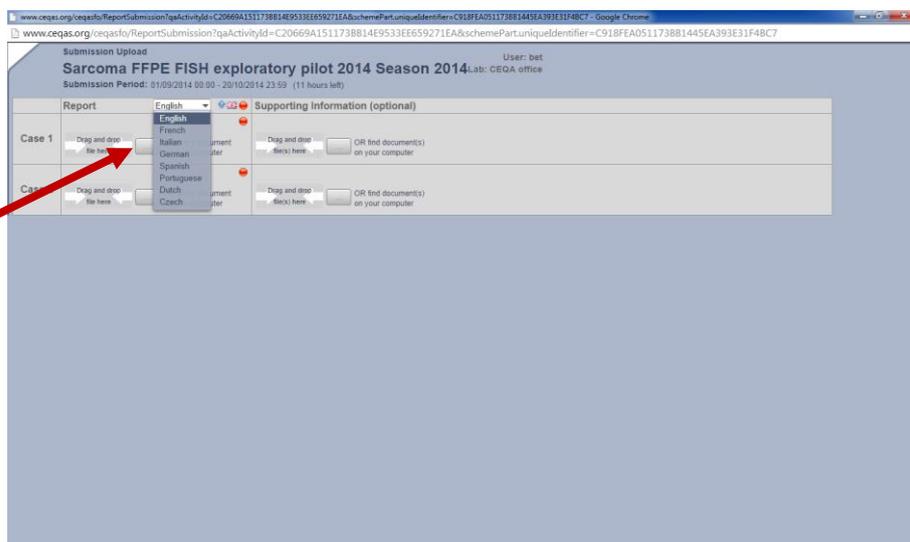
email notification   For every form uploaded all registered users at the laboratory will receive an automatic email notification.

Forms will vary according to the details of the scheme, but a typical example is shown below:

Figure 8 - Example (RTF) form for case submission

3.2   SCHEME DOCUMENTS

Scheme documents are made available in two forms: those made available according to a timetable, for example the results of an EQA; and those which are always available, such as instructions to labs about participating in the EQA. Timetabled documents appear first, as making them available is considered to be a form of EQA activity. Colour coding is as for EQA activities.

3.3   CERTIFICATES

To access certificates, use the "View Laboratory Documents" button in the top section of the Schemes screen, next to the "Search" button.

You will be offered a pop-up screen, with a view over the data repository containing your certificates:

Figure 9 - Browsing your certificates

This is the top-level folder. Within this will be a folder for each scheme season, with certificates in PDF format stored in those folders. The certificates appear here automatically when approved by the scheme administrator.