# Application Management Tool

## User Manual

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>2</td>
</tr>
<tr>
<td><strong>Account Management</strong></td>
<td></td>
</tr>
<tr>
<td>Create New Account</td>
<td>3</td>
</tr>
<tr>
<td>Password Reset</td>
<td>5</td>
</tr>
<tr>
<td>Account Activation</td>
<td>7</td>
</tr>
<tr>
<td>Log In</td>
<td>9</td>
</tr>
<tr>
<td>Log Out</td>
<td>10</td>
</tr>
<tr>
<td><strong>Dashboard</strong></td>
<td>11</td>
</tr>
<tr>
<td>Roles</td>
<td>11</td>
</tr>
<tr>
<td>Applications</td>
<td>12</td>
</tr>
<tr>
<td><strong>Application Process</strong></td>
<td></td>
</tr>
<tr>
<td>Start New Application</td>
<td>14</td>
</tr>
<tr>
<td>Steps for starting a new application:</td>
<td>14</td>
</tr>
<tr>
<td>Fill Application Form</td>
<td>16</td>
</tr>
<tr>
<td>1 - Requirement Navigation</td>
<td>16</td>
</tr>
<tr>
<td>2 - Evidence</td>
<td>16</td>
</tr>
<tr>
<td>3 - Tabs Menu</td>
<td>17</td>
</tr>
<tr>
<td>4 - Actions Menu</td>
<td>17</td>
</tr>
<tr>
<td>Revise Application</td>
<td>18</td>
</tr>
<tr>
<td><strong>Review Process</strong></td>
<td>19</td>
</tr>
<tr>
<td>Become a reviewer</td>
<td>19</td>
</tr>
<tr>
<td>Review an application</td>
<td>19</td>
</tr>
<tr>
<td>Review Diff Tool</td>
<td>20</td>
</tr>
</tbody>
</table>
Versioning

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 October 2022</td>
<td>1</td>
<td>Initial version</td>
</tr>
<tr>
<td>14 February 2023</td>
<td>2</td>
<td>Additions due to questions from users</td>
</tr>
</tbody>
</table>

Introduction

In this document you will find information on how to use the CoreTrus Seal Application Management Tool.
Account Management

In order to use the AMT you need to have an account.

Create New Account

Before you can use CTS AMT you need to create an account.

1. On the landing page click the sign up button
   a. https://amt.coretrustseal.org/
2. Fill in and submit the form
3. Check your email for account activation message
4. Activate your account on the activation page provided via email

Create New Account, step 1:
On the landing page (https://amt.coretrustseal.org/) click the sign up button

Create New Account, step 2: Fill in and submit the form
Create New Account, step 3: Check your email for account activation message

Create New Account, step 4: Activate your account on the activation page provided via email

Account activation
To activate your account click the button below.

ACTIVATE ACCOUNT
Password Reset

To reset your password do the following.

1. On the landing page click the sign in button
   a. https://amt.coretrustseal.org/
2. On the sign in page click Reset Password
3. Fill in and submit the form to request a password reset
4. Check your email for password reset message
5. Fill in and submit the form to reset your password

Note, if you fill in an incorrect email address the AMT will not display any kind of warning. If you do not receive an email double check your email address is correct.

Password Reset, step 1:
On the landing page (https://amt.coretrustseal.org/) click the sign in button

Password Reset, step 2: On the sign in page click Reset Password
Password Reset, step 3: Fill in and submit the form to request a password reset

Password reset

To reset your password fill in your email address below and click the submit button.

Email
Enter Email

Submit Cancel

Password Reset, step 4: Check your email for password reset message

Password Reset, step 5: Fill in and submit the form to reset your password

Password Reset
Fill in the form below to reset your password.

Password
Enter Password

Repeat Password
Repeat Password

Reset Password
Account Activation

If you can not activate your account because your token is no longer valid you can request a new activation token.

1. On the landing page (https://amt.coretrustseal.org/) click the sign up button
2. Click on Activate Account below the form
3. Fill in and submit the form to request a new activation token
4. Check your email for account activation message
5. Activate your account on the activation page provided via email

Account Activation, step 1:
On the landing page (https://amt.coretrustseal.org/) click the sign up button

Account Activation, step 2: Click on Activate Account below the form
Account Activation, step 3:
Fill in and submit the form to request a new activation token

Application Management Tool

Request New Token
If your activation code has expired fill in and submit the form below to request a new token.

Email

Enter Email

SUBMIT  CANCEL

Account Activation, step 4: Check your email for account activation message

Account Activation, step 5: Activate your account on the activation page provided via email

Application Management Tool

Account activation
To activate your account click the button below.

ACTIVATE ACCOUNT
Log In

In order to use the application you must log in.

1. Browse to the CoreTrustSeal AMT
   a.  https://amt.coretrustseal.org/
2. Click Sign In button
3. Fill in the form and click Log In

Log In, step 1: Browse to https://amt.coretrustseal.org/

Log In, step 2: Click Sign In button

Application Management Tool

Become a trustworthy data repository

This Application Management Tool allows data repositories to apply for a CoreTrustSeal certification.

Log In, step 3: Fill in the form and click Log In
Log Out

You can log out by clicking on the button in the top right corner.
Dashboard

After you log in you will see the dashboard page. The dashboard is split into multiple sections that allows you to perform certain tasks. Available options depend on your current role.

Roles

You can change your role from the menu in the top right corner. Every time you switch roles you will be brought to the dashboard.

Applicant

In the Applicant role you can apply for certification and perform various other tasks related to this subject. The Applicant role is assigned by default to each account.

Reviewer

In the Reviewer role you can review the applications of other repositories.

Board Member

In the Board Member role you can perform the board review of applications.
Applications

1 - Application Overview
On the left hand side you will see the overview of currently running applications grouped by role. This overview is the same regardless of your current role.

2 - Actions Menu
You can perform multiple tasks via the actions menu. The menu changes dynamically based on your role and the status of the application. Icons are explained below.

- Work on your application or review.
- Invite additional applicants.

Invitations are bound to email addresses, therefore it is important that you use the correct email address to invite collaborators. Invitees will be notified via email. If the invitee does not have an AMT account they can register and activate their account. Upon account activation the invitee will be assigned as an additional applicant. If the invitee already has an AMT account they will be assigned as an additional applicant automatically.

- Export the application as a PDF file.
Application Process

This chapter describes the application process for the Applicant role. In this role you can fill in a form in order to get your repository certified.

The application process contains multi-steps. Below is a brief description of the steps in order. More detailed information will be provided in the following sections.

1 - Start New Application
The process starts by creating a new application. This step is the same for all new applications, it does not matter if this is the first time or a renewal of your certification.

2 - First Application
Once you have started the application you can start filling out the form, it is split up in multiple requirements.

3 - First Submit
Once you have filled in the form complete you can submit it. Warning, once submitted you can not alter the form!

4 - Review
Your submission will be reviewed. This will result in either a request for revision, acceptance, or rejection. In case revision is needed the reviewers will provide feedback.

4A - Revise Loop
If your first submission is not accepted you will enter the revise loop. During this loop you will be provided with the opportunity to revise your application multiple times.

Revise Application
Revise your application form according to the feedback given.

Revise Submit
Submit your revised form. Warning, once submitted you can not alter the form!

Revise Review
Your submission will be reviewed. This will result in either a request for revision, acceptance or rejection. In case revision is needed the reviewers will provide feedback and you start with Revise Application again.

5a - Acceptance
When the CoreTrustSeal board accepts your application the process finishes. Your repository is now certified and your application will be published on the website: https://amt.coretrustseal.org/certificates

5b - Rejection
When the CoreTrustSeal board rejects your application the process finishes. Your application will not be made public.
Start New Application

To start a new application follow the steps below.

**Select institution / repository**
You can select any institution or repository that is known to the AMT from the menu. The available repositories are based on the selected institution. If your institution and/or repository is not known yet please create a new one (see below).

**Create new institution / repository**
When you create a new institution or repository you will be presented with a pop up window that contains the required form. Fill in the form and click save to create the institution or repository.

Steps for starting a new application:

1. Log in
2. Select the Applicant role
3. Click “start new application” in top left corner
4. Select or create the correct institution
   a. Select institution
   b. Create new institution
5. Select or create the correct repository
   a. Select repository
   b. Create new repository

Application Process step 3, Click “Start new application” in top left corner
Application Process step 4a, Select existing institution

Application Process step 4b, Create new institution

Application Process step 5a, Select existing repository

Application Process step 5b, Create new repository
Fill Application Form

The application form contains multiple elements, each of which are described below. On the next page you will find an illustration along with the numbers of the elements described below.

1 - Requirement Navigation
On the left hand side of the screen you will find requirement navigation. You can click on any requirement to jump to it

2 - Evidence
At the center of the screen the evidence area is displayed, this is the main area of business for the application. Here you can select a compliance level, give a written statement, and provide links to external statements.

Level of Compliance
Choose one of the following compliance levels:

- In Progress: the repository is in the implementation phase.
- Implemented: the requirement has been fully implemented by the repository.

Evidence - Written statement
Please provide written evidence for the chosen compliance level. Applications under review are confidential to CoreTrustSeal reviewers and the Board, but successful applications are made publicly available. Applicants should therefore keep all of these audiences in mind when filling the statement.
Evidence Links
When you enter the urls you add a name and the link.
You are welcome to add numbers to the name of the url and refer to them in the text with the number you assigned.
Note: Evidence Links are reusable. Once created you can select it from the menu at any requirement.

Note: all field are mandatory for some fields it is accepted to fill N.A. (not applicable):
- **Re3data Identifier** -> you can apply for an identifier via [https://www.re3data.org/](https://www.re3data.org/) or fill N.A.
- **Applicants renewing their CoreTrustSeal certification: summary of significant changes since last application.** -> this field should only be filled when you are recertifying for CoreTrustSeal, this means you have been awarded a CoreTrustSeal certification before. If this is the first time your repository is applying for a CoreTrustSeal certification you can fill N.A.
- **Applicant Feedback** -> We welcome feedback on the CoreTrustSeal Requirements and the Certification procedure. Please leave any general comments/ questions you would like to put to the CoreTrustSeal board in this field or fill N.A.

More information on how to fill the different requirements can be found in the [CoreTrustSeal Extended Guidance 2023-2025](https://www.re3data.org/).

3 - Tabs Menu
On the right hand side of the screen you will find the tabs menu. You will always be able to see the Guidance tab. After your application has been reviewed you will also be able to see the reviews under the added review tab.

4 - Actions Menu
On the bottom right of the screen you will find the actions menu with the following buttons:

**Save**
Saves the input for the current requirement and jumps to the next
- If you are at the last requirement it will ask you to submit your application instead of jumping to the next requirementment.

**Home**
Brings you back to the dashboard

**Publish**
Publish your application for review
  - This is only possible if you have filled in the form completely.

Note for your First Application:
Fill in the required information for each requirement and click save, this can be done in any order you like. Before you publish your application for review, double check your work.
**Warning. once you have published your application you can no longer alter it!**
Revise Application

When revising an application the applicant should update the evidence (compliance level, written statement and/or links) in reaction to the reviewer(s) comment(s). During revision the Application Form has two more features as described below.

1 - Requirement Navigation
The navigation menu will show you which requirements have been accepted and which need to be revised.

2 - Tabs Menu
The Review tab is now available in the tabs menu. To see the review of the current requirement click on the Review tab. Each review has its own sub tab, you can switch between reviews by clicking on the sub tabs.
Review Process

This chapter describes the application review process for the Review role. In this role you can review the applicant's work and provide them with feedback if needed.

Become a reviewer

Once you have completed a CoreTrustSeal application successfully your institute will be asked to provide a reviewer. You can also request to become a reviewer yourself by sending an email to info@coretrustseal.org. Please note you must have participated in at least 1 successful CoreTrustSeal application. Once accepted as a reviewer you will be assigned the reviewer role in the AMT and can then be added to a certain application as a reviewer.

Review an application

Select the Reviewer role in the top right hand corner, the dashboard will reload and you now see which applications you can review. Select the application you wish to review via the actions menu. You can also export the application as a PDF file from the actions menu.

Select application to review or export PDF file

Once you have selected an application to review you will be presented with the review form. This form is very similar to the application form with a few exceptions. You will find an illustration along with the numbers of the elements described below.
1 - Requirement Navigation
On the left hand side of the screen you will find requirement navigation. You can click on any requirement to jump to it.
If this is the second, third, etc., review you will also see which requirements the applicant revised.

2 - Evidence
At the center of the screen the evidence area is displayed. Here you will find the evidence provided by the applicant consisting of: Level of compliance, Evidence - written statement, and Evidence links to external evidence provided.

3 - Tabs Menu
On the right hand side of the screen you will find the tabs menu. As a reviewer you have both the Guidance and Review tabs available.
In the Review tab you can write your review for each requirement by selecting a compliance level, verdict (REVISE or ACCEPT), and providing a written statement.
Note: If your verdict is REVISE you must provide a written explanation.

4 - Actions Menu
On the bottom right of the screen you will find the actions menu with the following buttons:

Save
Saves the input for the current requirement and jumps to the next
  ● If you are at the last requirement it will ask you to submit your review instead of jumping to the next requirement.

Home
Brings you back to the dashboard

Publish
Publish review to notify the administrator that you have finished
  ● This is only possible if you have filled in the form completely.

Warning, once you have published your review you can no longer alter it!

Review Diff Tool
After the first review you will be able to use a “diff tool” to quickly find the difference between the previous and current evidence. This option is available for any requirement that has been revised by the applicant.

The diff tool highlights removed text in red and new text in green. That that was unchanged is not highlighted.

To use the diff tool:
  1. Click the Show Difference button on a revised requirement
  2. Inspect the difference
Step 1, click the Show Difference button

Evidence

Bibendum est ultricies integer quis auctor. Curabitur gravida arcu ac tortor dignissim.

Step 2, inspect the difference

Evidence

Review Loop: 0 → Review Loop: 1

| 1 | Loren mollis aliqua ut porttitor leo a diam sollicitudin. Id diam vel quam elementum pulvinar etiam non quam luctus. Morbi leo urna molestie at elementum eu facilisis sed odio. Mauris vitae ultricies leo integer malesuada. Placerat in egestas erat imperdiet sed euismod. Duis ut ornare lectus sit amet est placerat. Bibendum est ultricies integer quis auctor. Curabitur gravida arcu ac tortor dignissim. | — |

Close Difference