**AASHTOWare Project Material User Guide**



**Prepared by the Office of Construction from excerpts originally by InfoTech**

**Logging On**

AASHTOWare Project is a web-based application. You start AASHTOWare Project by opening a web browser (either Chrome, Internet Explorer, or Edge) and entering the address of the program.



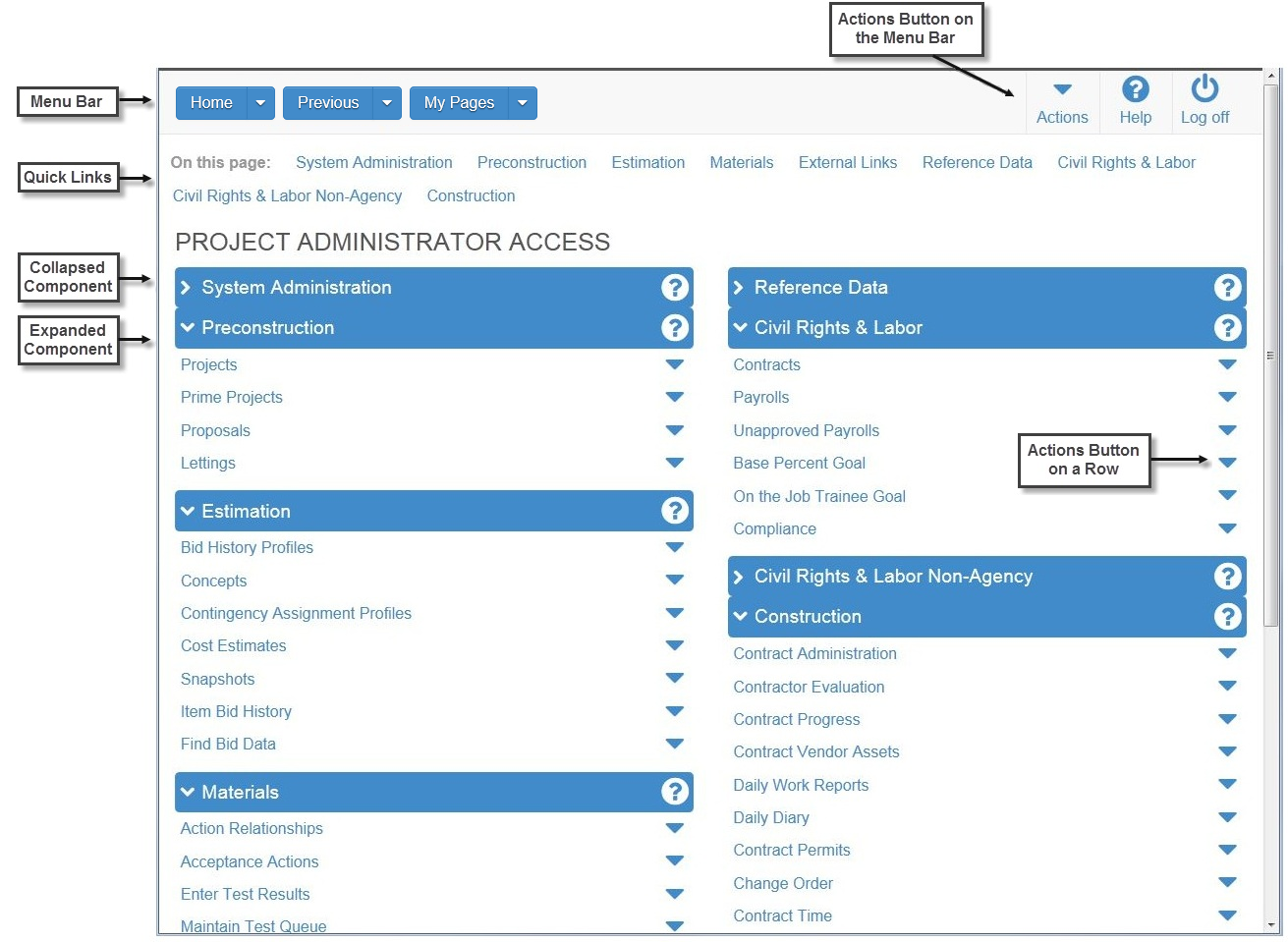
On the logon page, enter your user name and password. The **Username** field is not case sensitive. The **Password** field is case sensitive.

**The Dashboard**

When you log on to the system, the software opens on the dashboard. You can also go to the dashboard at any time by clicking the **Home** button on the Menu Bar.

The dashboard contains one or more components. Each component is identified by a title set within a blue header bar. Each component provides access to the information and processes required for a specific area of your agency's work. The components you see on your dashboard are those that match the specific areas of responsibility assigned to your active role. See Understanding Your Role and Using Components below for more information.

The following example shows the dashboard as it might appear for a system administrator. Keep in mind that some of the components shown in the example might not be available for you depending on your active role and which business areas are included on your system.

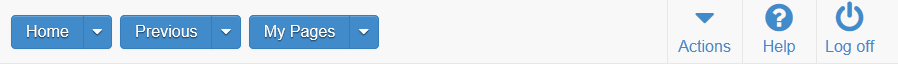


The dashboard includes these standard features:

* **Menu Bar** — The system displays the Menu Bar at the top of every webpage in the system. The buttons and menus on this bar help you to move quickly through the system to visit the pages and components you use most often.

**Menu Bar**

The Menu Bar is a horizontal strip at the top of every application webpage.



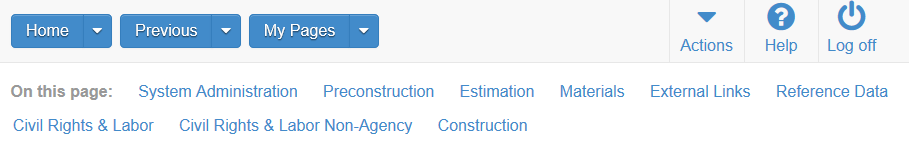
* The left side of the Menu Bar contains these buttons and menus:
* **Home** - Clicking this button takes you to the dashboard for your active role. Clicking the down arrow opens the Home menu, which contains an indicator for your active role (bold text with a check mark) and lists all the roles assigned to you. This menu allows you to switch roles from any location in the system. When you switch roles, you remain on the component where you were working unless the new role does not have appropriate security rights, in which case the system takes you to the dashboard. For more information about roles, see [Understanding Your Role](#understandingrole).
* **Previous** - Clicking this button returns you to the last page you visited in the system using your active role. Clicking the down arrow displays a list of links to the most recent pages you visited in your active role, along with a link to the Previous Activity Overview component. On the Previous Activity Overview, you can access a much longer list of links to previously viewed pages. Clicking a link takes you to that location in the system.
* **My Pages** - Clicking this button takes you to the My Page Overview component, where you can manage frequently used (or *favorite*) pages for your active role. You can add pages as favorites from any location in the system by clicking the down arrow and selecting **Remember this Page**.

The right side of the Menu Bar contains these buttons and menus:

* **Actions** - Clicking this button opens a menu of actions you can take within the system. The actions that are listed are limited to those that are relevant for your active role. When you select an action, the system automatically takes you to the component in the system where the action can be performed.
* **Help** - If your agency has recorded agency Help, clicking this button takes you to a separate browser window containing online help for your active role. If agency Help has not been recorded, clicking this button takes you to the Welcome page of the standard online Help.
  + **Search**
  + The Search pane provides a rapid full-text search of all the topics in the Help system
* **Log off** - Clicking this button ends your session.

### Quick Links

Quick links are displayed in blue text below the Menu Bar and above the webpage title. These links allow you to quickly jump to application pages related to the current page.



If you are on a page that contains multiple components, quick links preceded by the label **On this page** are displayed for each component on the page. When you click one of these quick links, the system automatically scrolls the page to the location of the component.

**Using Bookmarks**

You can bookmark specific pages in the software just as you would for any other website. However, if you have not yet logged on to the system, clicking a bookmark will take you to the logon page rather than the bookmarked page.

**Alternate Paths**

Keep in mind that all of the various navigational elements, such as hypertext links, quick links, recent pages, and **Actions** menus, can all provide different ways of accomplishing the same task. The same command might be accessible from an **Actions** menu or as a link. For example, to access the Project Overview component, you can click the **Projects** link on the Preconstruction component, or you can select **Open** from the **Actions** menu on the Projects row. Both methods of navigation achieve the same result. Feel free to explore the system and

**Icons**

Icons are small images throughout the system that either convey information or can be clicked to perform an action. For example, a red asterisk icon indicates a required field. An eraser icon in a Quick Find search box can be clicked to reset search criteria. This table shows some of the common icons used in the system:

|  |  |
| --- | --- |
| **Icon** | **Usage** |
| Eraser.png | The eraser icon appears in Quick Find search boxes after criteria is entered. You can click the icon to reset the search criteria |
| AutocompleteMagIcon.png | This magnifying glass icon at the left side of a field indicates an auto-complete field. Auto-complete fields display a filtered list of field values based on the first few characters you type. You can press Enter to show all values. |
| TextBoxIcon.png | This magnifying glass is sometimes displayed on the right side of a text box. Clicking this button opens a text dialog panel that allows you to view and edit the text in a larger area. |
| RedAsterisk.png | A red asterisk indicates a field where data entry is required. |
| Actions.png | The actions icon appears on **Actions** buttons that you can click to display an **Actions** menu. Actions menus provide access to commands and functions you can perform on data. |
| Delete.png | The red X icon appears on **Delete** buttons that you can click to remove newly added rows that have not been saved. Clicking a **Delete** button removes the row immediately. |
| MarkForDeletion.png | The trash can icon appears on the **Mark for Deletion** button that you can click to remove saved rows. When you click the **Mark for Deletion** button, the button changes to an **Undo** button. The row is removed only when you save the changes. |
| Undo2.png | The undo icon appears on **Undo** buttons that you can click to reverse an action, such as deleting a saved row. |
| Help2.png | The help icon appears on **Help** buttons that you can click to display the online Help system. |
| Calendar2.png | The calendar icon is displayed on the right side of a date field. You can click the calendar icon to display a calendar where you can pick a date as the field value. |

**Understanding Your Role**

A user *role* is a name associated with a collection of security access rights to the information contained in system components. Roles combine the permissions needed for several related tasks and allow you more efficient access to the parts of the system you need. Roles are designed by your agency and assigned to you by your system administrator.

All users of the system are assigned at least one security role. Many users have multiple roles, but you can only use one role at a time. Therefore, you are always limited to the security access rights of your *Active Role*.

To see which of your roles is currently active, click the down arrow on the **Home** button on the Menu Bar. The **Home** menu lists all of the roles that are currently assigned to you. Your active or current role appears at the top of the list with a check mark beside it.

You can switch your active role at any time by clicking another role on the **Home** menu. By selecting a different role, your permissions and security access are changed to reflect the areas you need to access to perform your duties in the new role. When you switch roles, the system continues to display the component where you were working unless the new role does not have appropriate security rights, in which case the system takes you to the dashboard.

If you are assigned multiple roles that have responsibilities for multiple approvals at different stages of the same workflow or approval process, you can only perform the approval corresponding to the authority of your Active Role. If the approvals are sequential, however, the system allows you to switch roles without leaving the approval component.

**Sample Records**

**Finding Sample Records**

The Find Sample Record component enables you to perform a quick search or an advanced query to locate matching sample records. Matching search results are displayed in the list at the bottom of the page. When you find the sample record you are looking for, you can click the **Sample ID** link to view the record in the Sample Record Summary.

Keep in mind that the search results are limited according to the sample access rights and contract authority assigned to your active user role.

To access the Find Sample Record component, click the **Find Sample** link in the Materials component.

**Using Power Search**

Power Search enables you to quickly locate a sample record by applying search criteria to one or more fields. Enter criteria and select fields in the Power Search section at the top of the Find Sample Record component. To perform a power search, follow these steps:

1. In the **Entity** column, select the type of sample record information you want to search.  
     
   *The type of information you selected becomes the top level of the hierarchy in the* ***Entity*** *column. You can continue to select different entities until you reach the type of information you want to search. You can click the* ***Back*** *arrow at the top of the* ***Entity*** *column to return to the previous level of entity information.*  
     
   *Each time you select a new value in the* ***Entity*** *column, the system updates the* ***Fields*** *column to list fields related to the selected entity.*
2. In the **Fields** column, select one or more fields you want to include in the search.  
     
   *A check mark appears next to the field to indicate it is selected. You can click a field again to clear a selection. Continue selecting fields as needed.***Note:** When multiple fields are selected, only one of the field values must match the search criteria for a record to be included in the search results.
3. In the **Criteria** field, enter the search criteria you want to locate in the selected fields.
4. When you are finished, click the **Search** button (magnifying glass) to apply your search criteria.  
     
   *Sample records that match your criteria are listed at the bottom of the page.*

**Managing Sample Records**

A sample record contains information about a material that was sampled, tested on location, reviewed for appearance, or other circumstances involving a material sample. The Sample Record Overview lists all of the sample records for which your active user role has security access to view.

Throughout the system, access is restricted to show only those sample records associated with your administrative office or an office that is lower in the administrative office hierarchy. Your administrative office is determined by the contract authority assigned to your active user role. If a sample record is associated with contract project items, you must also have contract authority for the parent contract in order to access the sample record or associated tests. In addition, if a sample record is associated with a limited sample access role, only users who are logged on with that role can access the sample record and its associated tests.

You can access the overview by clicking the **Sample Records** link in the Materials component. Each row represents one sample record and displays values in these fields:

* Sample ID
* Sample Status
* Material Code
* Material Full Name
* Remarks

You can locate a specific sample record by typing criteria in the Quick Find search box on the Sample Record Overview. You can also perform an advanced search by using the Find Sample Record component. See [Finding Sample Records](#findingsamplerecords) for more information.

To create a new sample record, select **Add** from the **Actions** menu on the component header. See [Creating a Sample Record](#creatingsamplerecord) for more information.

To create a new sample record by copying selected data from an existing sample record, with selected sample data, select **Copy** from the **Actions** menu on the sample row. To delete a sample record, select **Delete** from the **Actions** menu on the sample row. The system shades the row gray to indicate it is marked for deletion. To reverse the delete action, click the **Undo** button. To save your changes, click the **Save** button.

To open a sample record, click the **Sample ID** link, or select **Open** from the **Actions** menu on the sample row. See [Maintaining a Sample Record](#maintaingsamplerecord) for more information.

To authorize a sample record, select **Authorize** from the **Actions** menu on the sample row. See [Authorizing a Sample Record](#reviewing_samples_htm_authorizin_4107).

To enable changes to an authorized sample record by creating an editable copy of the sample record with a new sample ID, select **Revise** from the **Actions** menu on the sample row. See [Revising an Authorized Sample Record](#maintaining_a_sample_record_htm__4354).

To create one or more editable copies of a sample record, select **Split Sample Record** from the **Actions** menu on the sample row.

To remove authorization from a sample record without creating a new editable copy of the record, select **Unauthorize** from the **Actions** menu on the sample row. The system clears the values in the **Authorized By** and **Authorized Date** fields and saves the changes automatically. The sample record is no longer read-only and can be modified as needed.

If a sample record was created by copying the materials information in the Daily Source Report Summary component, you can go to the DSR Summary by selecting **DSR** from the *Views* section of the **Actions** menu on the sample record row.

**Creating a Sample Record**

A sample record contains information about a material that was sampled, tested on location, reviewed for appearance, or other information related to a material sample.

To create a new sample record, select **Add** from the **Actions** menu on the Sample Record Overview component header or **Add New** from the **Actions** menu on the Sample Record Summary component header. Alternatively, you can select **Create New Sample Record** from the **Materials** tab on the Daily Source Report Summary. The system takes you to the Add Sample Record component with the **General** tab displayed.

To save a new sample record, a value is required in the Sample ID field. When you add a new sample record, the system either generates a new **Sample ID** or displays the field blank.

note2.gif **Note:** When you add a sample record, you might not be able to enter a value in the **Sample ID** field depending on agency option settings. If your agency has the *Sample ID Auto Generation* agency option set to *True*, the system automatically generates a value in the **Sample ID** field when you create a new sample record. You cannot change a system-generated sample ID unless your agency also has the *Sample ID Auto Generated ID Override* agency option set to *True*. If both options are set to *True*, then you have the ability to reject the system-generated sample ID and create a new ID manually.

It is not required, but you can enter or view information in the remaining fields on the **General** tab as needed:

* Material Code - Name
* Administrative Office
* Lab Reference Number
* Control Number
* Control Type
* Seal Number
* Sample Size
* Sample Size Units
* Represented Quantity
* Represented Quantity Units
* Remarks
* Sample Date
* Sample Type
* Acceptance Method
* Link To

These fields are displayed on the **General** tab, but cannot be edited when you are creating a new sample record:

* Lab Control Number
* Sample Status
* Authorized By
* Authorized Date
* Revising Sample ID
* Revised By
* Link From

You can add any number of remarks in the **Remarks** box. The types of remarks allowed are determined by your agency. To record a remark, you must first select the type of remark from the Type field, then enter explanatory text in the Remark text box.

It is not required, but you can enter values on the **Sample Location** tab as needed.

It is not required, but you can enter values on the **Additional Information** tab as needed.

If you enter a value for the Material Code - Name field on the **General** tab, and the material specified requires a source facility, then you must also select a primary source on the **Sources/Facilities** tab in order to save the new sample record.

When you are finished entering information, click the **Save** button. The system displays the new sample record on the Sample Record Summary. For more information, see [Maintaining a Sample Record](#maintaingsamplerecord).

**Maintaining a Sample Record**

The Sample Record Summary contains all of the information for the sample record. To access the Sample Record Summary, click the **Sample Records** link in the Materials component, locate the sample record you want to view, and then select **Open** from the **Actions** menu on the sample record row.

The component opens on the **General** tab. You can view or change information in these fields:

* Sample ID
* Material Code - Name
* Administrative Office
* Lab Control Number
* Lab Reference Number
* Control Number
* Control Type
* Seal Number
* Sample Size
* Sample Size Units
* Represented Quantity
* Represented Quantity Units
* Remarks
* Sample Date
* Sample Status
* Sample Type
* Acceptance Method
* Authorize as Group
* Authorized By
* Authorized Date
* Revising Sample ID
* Revised By
* Link To
* Link From

Click in a field and add, change, or delete information as needed.

note2.gif **Note:** You cannot change the value in the **Material Code - Name** field after a test has been assigned to the sample record or after the sample record reaches *Logged* status or higher. No changes can be made to a sample record with a status of *Authorized* except adding or modifying disposition remarks.

note2.gif **Note:** When you add or copy a sample record, you might not be able to enter a value in the **Sample ID** field depending on agency option settings. If your agency has the *Sample ID Auto Generation* agency option set to *True*, the system automatically generates a value in the **Sample ID** field when you create a new sample record. You cannot change a system-generated sample ID unless your agency also has the *Sample ID Auto Generated ID Override* agency option set to *True*. If both options are set to *True*, then you have the ability to reject the system-generated sample ID and create a new ID manually.

When you are finished making changes, click the **Save** button. The system displays a message to confirm that your changes were saved in the database.

To create a new sample record, select **Add New** from the **Actions** menu on the component header. See [Creating a Sample Record](#creating_a_sample_record_htm) for more information.

To copy a sample record and selected sample data, select **Copy** from the **Actions** menu on the component header. See [Copying a Sample Record](#copying_a_sample_record_htm) for more information.

To create one or more editable copies of a sample record, select **Split Sample Record** from the **Actions** menu on the component header. See [Splitting a Sample Record](#splitting_a_sample_record_htm) for more information.

If the sample record was created from a DSR material SMFMI, you can display the DSR used to create the sample record by selecting **DSR** from the **Actions** menu on the component header. See [Maintaining a Daily Source Report](#maintaining_a_daily_source_repor_7889) for more information.

If the sample record was created from a DWR acceptance record, you can display the DWR used to create the sample record by selecting **DWR** from the **Actions** menu on the component header.

To void a sample record, select **Void** from the **Actions** menu on the component header. The system displays a message to confirm that your changes were saved.

To authorize a sample record, select **Authorize** from the **Actions** menu on the component header. See [Authorizing a Sample Record](#reviewing_samples_htm_authorizin_4107).

To enable changes to an authorized sample record by creating an editable copy of the sample record with a new sample ID, select **Revise** from the **Actions** menu on the component header. See [Revising an Authorized Sample Record](#revisingauthorizedsamplerecords).

To remove authorization from a sample record without creating a new editable copy of the record, select **Unauthorize** from the **Actions** menu on the component header. The system clears the values in the **Authorized By** and **Authorized Date** fields and saves the changes automatically. The sample record is no longer read-only and can be modified as needed. If the sample record has been split and is set to Authorize as Group, all splits from the sample record are also unauthorized.

To maintain additional information for the sample record, click the following tabs:

|  |  |
| --- | --- |
| **Sample Location** | Click this tab to maintain location information for the sample record (see [Maintaining Sample Location Information](#maintaining_sample_location_info_6883)). |
| **Additional Information** | Click this tab to maintain additional information for the sample record (see [Maintaining Additional Information for a Sample Record](#maintaining_additional_informati_8251)). |
| **Sources/Facilities** | Click this tab to maintain source and facility associations for a sample record (see [Maintaining Sources and Facilities for a Sample Record](#maintaining_sources_and_faciliti_1214)). |
| **Associations** | Click this tab to maintain destination lab, inspection agency, and other associations for the sample record (see [Maintaining Associations for a Sample Record](#maintaining_associations_for_a_s_9632)). |
| **Contract** | Click this tab to maintain contract project item material sets associated with the sample record (see [Maintaining Contract Project Items for a Sample Record](#maintaining_contract_project_ite_8086)). |
| **Tests** | Click this tab to view and assign tests for the sample record (see [Maintaining Test Assignments for a Sample Record](#maintaining_test_assignments_for_2303)). |
| **Test Charges** | Click this tab to view and maintain test charges for the sample record (see [Maintaining Test Charges for a Sample Record](#maintaining_test_charges_for_a_s_8684)). |

**Revising an Authorized Sample Record**

After a sample record is authorized, it cannot be changed. If changes or rework are needed, you must either revise or unauthorize the sample record. Revising a sample record creates an editable copy of the record with a new Sample ID, enabling you to make changes as needed. The copy includes all of the information entered for the original record in the Sample Record Summary on the **General**, **Sample Location**, **Additional Information**, **Sources/Facilities**, and **Associations** tabs. Tests assigned to the original sample record are not copied.

To revise a sample record, perform these steps:

1. Navigate to the Sample Record Summary for the authorized sample record you want to revise, and then select **Revise** from the **Actions** menu on the component header.  
     
   *Depending on agency option settings, the system either displays a modal window for entering a sample ID for the revised sample record or it automatically creates a sample ID and displays it on the Sample Record Summary.*  
     
   *If the modal window is displayed, agency options also determine whether or not a default value appears in the* ***Revising Sample ID*** *field.*
2. If the modal window is displayed, enter or modify the value in the Revising Sample ID field as needed.
3. When you are finished, click the **Save** button.  
     
   *The system creates a copy of the sample record and displays the copy on the Sample Record Summary. You can enter or modify information for the sample record as needed. See* [*Maintaining a Sample Record*](#maintaining_a_sample_record_htm) *for more information.*  
     
   *On the original sample record, the system sets the Sample Status* *field to* Void *and the Revised By and Link To fields to the Sample ID for the new revised copy. All of the information in the original sample record becomes read-only.*  
     
   *On the new revised copy, the system sets the Sample Status* *field to* Pending *and the Revising Sample ID and Linked From fields to the sample ID of the original sample record. The values in the Authorized By and Authorized Date fields are cleared.*

**Maintaining Test Assignments for a Sample Record**

The **Tests** tab on the Sample Record Summary contains a list of tests assigned to the sample record. For a test to appear in the list, the current user must have an active testing qualification and an active qualified lab association for the sample record test.

The Material and Sample Type are displayed at the top of the tab. You can view information in these fields:

* Test Number
* Test Method
* Destination Lab
* Lab Unit
* MAA
* Required
* Default
* Test Status

By default, the **MAA** check box is selected to indicate that the test counts toward material acceptance actions. You can clear this check box if appropriate. Click the **Save** button to save your changes.

To assign all default tests to this sample record as appropriate for the sample record's material code, sample type, and destination lab, click the **Assign Default Tests** button. The system adds the new tests to the list. Only one test run can be added to a sample record for each required test. Click the **Save** button to save your changes.

To add another test run for a test that is already assigned to the sample record, select **Add Test Run** from the **Actions** menu on the test row. Note that the **Add Test Run** command is not available for tests that are marked as required. The system duplicates the row and increments the test number by one. Click the **Save** button to save your changes.

note2.gif **Note:** When a test run is repeated or rerun, the system increments the test number by one tenth. For example, if a test run numbered **2.0** must be rerun, the test number for the rerun is **2.1**.

To delete a test from this sample record, select **Delete** from the **Actions** menu on the test row. Tests marked as required cannot be deleted. Click the **Save** button to save your changes. If the sample record includes additional test runs with the same test method as the test you deleted, the test numbers for the remaining test runs are updated if needed.

To assign one or more default, optional, or required tests to the sample record, click the **Assign Tests** button. To be able to assign tests to a sample record, the sample record must be associated with a destination lab on the **Associations** tab. After tests are assigned to a sample record, the destination lab association cannot be changed. When you click the **Assign Tests** button, the system begins a guided process that enables you to select which tests you want to add to the sample record. For more information, see [Assigning Tests to a Sample Record](#assigning_tests_to_a_sample_reco_845).

To access additional information about a test, click the **Test Number** link on the appropriate row, or select **Open** from the **Actions** menu on the test row. The system takes you to the Sample Record Test Summary component. For more information, see [Maintaining Sample Record Tests](#maintaining_sample_record_tests__6439).

**Assigning Tests to a Sample Record**

The Assign Tests component provides a guided process that enables you to select and add tests to a sample record. To be able to assign tests to a sample record, the sample record must be associated with a destination lab on the **Associations** tab on the Sample Record Summary. After tests are assigned to a sample record, the destination lab association cannot be changed.

To assign tests to a sample record by using the Assign Tests guided process, perform these steps:

1. To access the Assign Tests component, navigate to the Sample Record Summary, click the **Tests** tab, and then click the **Assign Tests** button.  
     
   *The Assign Tests component opens on Step 1, Review Required Tests. Each row represents one test required for samples with this combination of material code, sample type, and destination lab.*
2. Review the tests that are required for this sample. When you are finished, click **Next**.   
     
   **Note:** You can click **Previous** at any time to return to a previous step in the guided process.    
     
   *The Assign Tests component displays Step 2, Select Default Tests. Each row represents one test indicated as a default for samples with this combination of material code, sample type, and destination lab.*
3. Click the rows for the default tests you want to assign to the sample record.    
     
   *The system adds a check mark at the beginning of the row. You can click the row again to clear the selection. Continue selecting default tests as needed.*
4. When you are finished, click **Next**.  
     
   *The Assign Tests component displays Step 3, Select Optional Tests. Optional tests are those not marked as default or required tests, but are appropriate for this combination of material code, sample type, and destination lab.*
5. If you want to assign a test, click the row to select it.  
     
   *The system adds a check mark at the beginning of the row. You can click the row again to clear the selection. Continue selecting optional tests as needed.*
6. When you are finished, click **Next**.  
     
   *The Assign Tests component displays Step 4, Add Test Runs and Confirm. This page lists the tests selected on previous steps in the guided process.*
7. For each test other than the required tests, you can enter a new value in the Test Runs field if needed. When you are finished, click **Confirm**.  
     
   *The system assigns the tests you selected and displays them in the list on the* ***Tests*** *tab on the Sample Record Summary. One test row is added for each instance specified in the test Runs field. When multiple test runs of the same test method are added, each test run is identified with a unique value in the Test Number field.*

**Maintaining Sample Record Tests**

The Sample Record Test Summary contains all of the information recorded about a test run assigned to a sample record. Tests are assigned to a sample record on the **Tests** tab on the Sample Record Summary (see [Maintaining Test Assignments for a Sample Record](#maintaining_test_assignments_for_2303)). If a sample record is associated with contract project items, you must have contract authority for the parent contract in order to access the tests for the sample record.

To access the component, navigate to the Sample Record Summary, and click the **Tests** tab. Locate the row for the test run you want to view. Click the **Test Number** link or select **Open** from the **Actions** menu on the appropriate row.

The Sample Record Test Summary component opens on the **General** tab. Information is divided into four collapsible sections: Test Information, Sample Information, Additional Test Information, and Remarks.

In the Test Information section, you can view or change information in these fields:

* Test Status
* Priority
* Default Test
* Required Test
* Due Date
* Remarks
* Planned Test Start Date
* Test Start Date
* Estimated Completion Date
* Actual Completion Date

In the Sample Information section, you can view read-only information in these fields:

* Lab Control Number
* Sample Type
* Lab Unit
* Lab Reference Number
* Contract ID
* Source
* Facility
* Type
* Remark

If a sample record is associated with one or more contract project items, the **Contract ID** field includes a list of contract IDs for the parent contracts of the associated contract project items.

In the Additional Test Information section, you can view read-only information in these fields:

* Retest Test
* Number of Retests
* Retest Requested
* Test Requeued
* Reportable
* Updateable
* Counts Toward MAA
* Test Result Value

Click in a field and add, change, or delete information as needed.

To add a remark to the sample record test, first select the type of remark from the Type field, and then enter a comment in the Remarks text box.

You can enter or change values in the **Due Date**, **Planned Test Start Date**, and **Estimated Completion Date** fields.

The **Test Result Value** field might be editable depending on the access level assigned to your user role and the setting for the *Allow Test Result Value Modification During Test Review State* agency option. Otherwise, the **Test Result Value** field is read-only. If you modify the **Test Result Value**, you are required to enter a remark.

When you are finished, click the **Save** button. The system displays a message to confirm that your changes were saved.

To change a test status to complete, select **Mark Test Complete** from the **Actions** menu on the component header. The system saves the change automatically and sets the **Actual Completion Date** to the current date.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow. See [Maintaining Alternate Test Workflows](#maintaining_alternate_test_workf_715) for more information.

If all tests assigned to a sample record are set to Autofinalize and all of the tests have an autofinalizable Test Result Value (see [Maintaining Test Result Values](#maintaining_test_result_values_h_5753)), then the system automatically sets the **Sample Status** to *Complete*, sets the **Authorized By** field to the system user, and the **Authorized Date** field to the current date and time. The sample record is now read-only.

If tests assigned to the sample record are not set to Autofinalize, you can manually authorize a sample record when the status for all tests assigned to the sample record have a Test Status of *Approved by Level 2* or *Cancelled*. See [Authorizing a Sample Record](#reviewing_samples_htm_authorizin_4107) for more information.

If an agency view is associated with a sample record test, you can access the agency view instance by selecting the name of the agency view from the **Actions** menu on the component header. If the current test status is not selected for the *Enter Test Results* agency option, or if the agency view was used to enter data but the agency view association is now inactive, you can view but not add or modify data displayed in the agency view instance. For more information, see [Understanding Agency Views](#mat_understanding_agency_views_h_4566) and [Maintaining Test Associations with Agency Views](#maintaining_test_associations_wi_4192).

To enter or maintain test results for sieve analysis, select **FACA Test Results** from the **Actions** menu on the component header. This command is available only when the FACA Test Results agency view is associated with the reference test and marked as the active agency view for the test. For information about using the FACA Test Results agency view, see [Entering Test Results for Sieve Analysis](#entering_test_results_for_sieve__3449). For information about associating an agency view with a test, see [Maintaining Test Associations with Agency Views](#maintaining_test_associations_wi_4192).

To maintain additional information for the sample record test, click the following tabs:

|  |  |
| --- | --- |
| **Testers** | Click this tab to add or change testers for the sample record test (see [Maintaining Testers for a Sample Record Test](#maintaining_testers_for_a_sample_4343)). |
| **Reference Specifications** | Click this tab to view reference specifications for the sample record test (see [Selecting Reference Specifications for a Sample Record Test](#selecting_a_reference_specificat_6902)). |
| **Retests** | The **Retests** tab is displayed only when one or more retests have been requested for the sample record test. Click this tab to view a list of retests requested for the sample record test (see [Viewing Retests for a Sample Record Test](#viewing_retests_for_a_sample_rec_2703)). |

**Maintaining Testers for a Sample Record Test**

The **Testers** tab on the Sample Record Test Summary lists all of the qualified testers who performed or are assigned to perform the sample record test. Each row represents one tester. Each row includes an **Actions** button and values in the Tester ID and Tester Action fields.

To delete a tester from a sample record test, select **Delete** from the **Actions** menu on the tester row. To reverse the delete action, click the **Undo** button. To save your changes, click the **Save** button.

To assign a new tester to perform this sample record test, click the **New** button. The system adds a new row to the list. Enter a value in the **Tester ID** and **Tester Action** fields. When you click in the **Tester ID** field and press Enter, the drop-down menu lists persons with active qualifications for the associated lab unit and test.

When you are finished, click the **Save** button. The system displays a message to confirm that your changes were saved in the database.

**Test Queues**

**Worksheets**

**Using Worksheets to Manage Test Queues**

The Materials Worksheets component is the gateway to accessing Materials worksheets you will use to manage sample record tests and test queues. For information about using the standard features of a worksheet, see [Working with Worksheets](#working_with_worksheets_htm).

For more information about using the specific worksheets in this area, click the following links:

* [Using the Worksheet to Receive Samples at a Destination Lab](#using_the_worksheet_to_receive_s_1481)
* [Using the Worksheet to Receive Samples at a Lab Unit](#using_the_worksheet_to_receive_s_7342)
* [Using the Worksheet to Enter Test Results](#using_the_worksheet_to_enter_tes_7125)
* [Using the Worksheet to Maintain Test Queues](#using_the_worksheet_to_maintain__3192)
* [Using the Worksheet to Review Tests](#using_the_worksheet_to_review_te_4452)
* [Using the Worksheet to Review Samples](#using_the_worksheet_to_review_sa_3619)

**Using the Worksheet to Receive Samples at a Destination Lab**

note2.gif **Note:** If your agency does not use worksheets to manage test queues, see [Receiving Samples at a Destination Lab](#receiving_samples_at_a_destinati_8944).

The Receive Sample at Destination Lab component is a worksheet that provides a quick way to review the list of samples and mark them as received at a destination lab.

The component lists sample records that have a sample status of *Logged*, *Received at Destination Lab*, or *In Testing*. Sample records are not included in this list if all of the lab units for all the sample record tests are set to have samples bypass the destination lab. Samples that do not bypass the destination lab remain in the list until they are marked as received at all of the parent destination labs for the lab units with which the sample record tests are associated.

For information about using the standard features of a worksheet, see [Working with Worksheets](#working_with_worksheets_htm).

To access this component, select **Receive Samples at Destination Lab** in the Materials Worksheets component. You can locate a sample in the worksheet by typing criteria in the Quick Find search box. Each sample row displays values for these fields:

* Sample ID
* Material Code
* Material Name
* Lab Control Number
* Lab Ref Num
* Sample Date
* Link To
* Sample Remarks

To view or record a remark for a sample record, click the link in the **Sample Remarks** field on that row. The system takes you to the **General** tab of the Summary component. For more information, see [Recording Remarks](#maintaining_a_sample_record_htm__9995).

To mark one or more sample records as received at a destination lab, select each sample you want to mark received by clicking the check box on the left side of the sample row. When finished, click the **Mark as Received** button on the component header. The system marks the selected samples as received at the destination lab and displays a message to confirm that your changes were saved.

When you mark a sample record as received, the system changes the sample record sample status. If the destination lab is set up so that sample records continue on to a lab unit, the system changes the sample status to *Received at Destination Lab*. If the destination lab is set up so that sample records bypass the lab unit, the system changes the sample status to *In Testing*, changes the sample record test status to *10 — Test in Queue*, and enters the current date in the **Received** field on the Enter Test Results component.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow. See [Maintaining Alternate Test Workflows](#maintaining_alternate_test_workf_715) for more information.

**Using the Worksheet to Receive Samples at a Lab Unit**

note2.gif **Note**: If your agency does not use worksheets to manage test queues, see [Receiving Samples at Lab Unit](#receiving_samples_at_a_lab_unit__4499).

The Receive Sample at Lab Unit component is a worksheet that provides a quick way to review a list of samples and mark them as received at one or more lab units for which you are a qualified lab tester.

For you to view a sample record on this component, you must be specified as a lab tester for the lab unit on the associated sample record tests. You must also have a testing qualification for the test method on the associated sample record tests.

The component lists sample records that have either been marked as *Received at the Destination Lab*, or if the associated lab unit is set to have samples bypass the destination lab, have a sample records status of *Logged*. If the sample record has already been received in one lab unit and is waiting to be received in another lab unit, it will have a status of *In Testing*. Sample records are not included in this list if the lab unit is set to bypass. Sample records that do not bypass lab units remain in the list until they are marked as received at all of the associated lab units.

To access this component, click the **Receive Sample At Lab Unit** link in the Materials Worksheet component. You can locate a sample by typing criteria in the Quick Find search box. Each sample row displays values in these fields:

* Sample ID
* Material Code
* Material Name
* Lab Control Number
* Lab Ref Num
* Sample Date
* Link To
* Sample Remarks

To view or record a remark for a sample record, click the link in the **Sample Remarks** field on that row. The system takes you to the **General** tab of the Summary component. For more information, see [Recording Remarks](#maintaining_a_sample_record_htm__9995).

To mark one or more sample records as received at a lab unit, select each sample you want to mark received by clicking the check box on the left side of the sample row. Click the **Mark as Received** button on the component header. The system marks the selected samples as received at the lab unit and displays a message to confirm that your changes were saved.

When you mark a sample record as received, the system changes the sample status to *In Testing*, changes the sample record test status to *10 — Test in Queue*, and enters the current date in the **Received** field on the Enter Test Results component.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow. See [Maintaining Alternate Test Workflows](#maintaining_alternate_test_workf_715) for more information.

**Using the Worksheet to Enter Test Results**

note2.gif **Note:** If your agency does not use worksheets to manage test queues, see [Entering Test Results](#entering_test_results_htm).

The Enter Test Results component lists all the tests for sample records that are currently in testing or in the testing queue, and provides a quick way to mark tests as complete when appropriate.

For you to view a test on this component, you must be specified as a lab tester for the lab unit associated with the sample record test. You must also have a testing qualification for the test method on the sample record tests.

To access this component, select **Enter Test Results** in the Materials Worksheets component. Information is displayed in two collapsible sections, each of which contains a worksheet. The **Retests** worksheet lists all tests that need to be retested or requeued. The **Tests** worksheet lists all samples waiting for initial test results to be recorded. For information about using the standard features of a worksheet, see [Working with Worksheets](#working_with_worksheets_htm).

Locate a sample record test in either worksheet by typing criteria in the Quick Find search box. You can also enter a value in the **Lab Unit** field to filter the list so that only tests for a specific lab are listed.

Each test row includes an **Actions** button and shows values in these fields:

* Sample ID
* Lab Ref Num
* Lab Control Number
* Test Description
* Test Number
* Planned Test Start Date
* Test Start Date
* Test Status
* Priority
* Due Date
* Material Code
* Material Name
* Sampler Name
* Sampler First Name
* Sampler Last Name
* Sample Type
* Source ID
* Source Name
* Facility ID
* Facility Name
* Received
* Link To
* Sample Remarks
* Test Remarks

To view or record a remark for a sample record or a sample record test, click the link in the appropriate **Remarks** field on that row. The system takes you to the General tab of the Summary component. For more information, see [Recording Remarks](#maintaining_a_sample_record_htm__9995).

To access more information about a test, click the link in the **Test Number** field to go to the Sample Record Test Summary for that test. To access more information about a test, click the link in the **Test Number** field to go to the Sample Record Test Summary for that test.

To mark one or more tests complete, select each test you want to mark complete by clicking the check box on the left side of the test row. When you are finished, click the **Mark Tests Complete** button at the bottom of the worksheet. The system saves the change and sets the **Actual Completion Date** for each complete test to the current date.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow. See [Maintaining Alternate Test Workflows](#maintaining_alternate_test_workf_715) for more information.

If an agency view is associated with a sample record test, you can access the agency view instance by selecting the name of the agency view from the **Views** section of the row **Actions** menu. For more information, see [Understanding Agency Views](#mat_understanding_agency_views_h_4566) and [Maintaining Test Associations with Agency Views](#maintaining_test_associations_wi_4192).

**Using the Worksheet to Maintain Test Queues**

note2.gif **Note**: If your agency does not use worksheets to manage test queues, see [Maintaining the Test Queue](#maintaining_the_test_queue_htm).

The Maintain Test Queue component is a worksheet that provides a quick way to review the list of sample record tests that are currently in testing or in the testing queue. You can use the worksheet to split a sample record, add tests or test runs to a sample record, or cancel tests.

The list is filtered to show only those sample record tests appropriate for your user account. For a test to appear in the list, the current user must be a lab tester for the lab unit associated with the sample record test.

The worksheet lists only sample records that have an appropriate status, as determined by agency options. By default, the sample record statuses included are *Pending*, *Logged*, *Received at Destination Lab*, *Received at Lab Unit*, and *In Testing*.

To access this component, select **Maintain Test Queue** in the Materials Worksheets component. For information about using the standard features of a worksheet, see [Working with Worksheets](#working_with_worksheets_htm).

To locate a sample record test, type criteria in the Quick Find search box. You can also enter a value in the **Lab Unit ID** field to filter the list to show only tests associated with the selected lab unit. The system displays sample rows that match your criteria.

Each sample row includes an **Actions** button and values in these fields:

* Sample ID
* Contracts
* Lab Control Number
* Lab Ref Num
* Test Method
* Test Description
* Test Number
* Reportable
* MAA
* Lab Unit
* Received at Lab Unit
* Priority
* Planned Test Start Date
* Due Date
* Material Code
* Material Name
* Test Status
* Sample Type
* Seal Number
* Sample Remarks
* Test Remarks
* Charge Amount
* Link To

To view or record a remark for a sample record or a sample record test, click the link in the appropriate **Remarks** field on that row. The system takes you to the General tab of the Summary component. For more information, see [Recording Remarks](#maintaining_a_sample_record_htm__9995).

To view or edit additional information about a sample record, click the link in the **Sample ID** field in that row to go to the Sample Record Summary. See [Maintaining a Sample Record](#maintaining_a_sample_record_htm) for more information.

To view or edit additional information about a sample record test, click the link in the **Test Number** field in that row to go to the Sample Record Test Summary. See [Maintaining Sample Record Tests](#maintaining_sample_record_tests__6439) for more information.

To add another test run for an existing test, select **Add Test Run** from the **Tasks** section of the row **Actions** menu. The **Add Test Run** command is not available for tests that are marked as required. The system duplicates the row, increments the test number by one, and saves the change automatically.

To assign tests to a sample record, select **Assign Tests** from the **Tasks** section of the row **Actions** menu. The system takes you to the Assign Tests guided process. See [Assigning Tests to a Sample Record](#assigning_tests_to_a_sample_reco_845) for more information.

To split a sample record into one or more editable copies, select **Split Sample Record** from the **Tasks** section of the row **Actions** menu. See [Splitting a Sample Record](#splitting_a_sample_record_htm) for more information.

To view the testers assigned to perform a sample record test, select **Testers** from the **Views** section of the row **Actions** menu. The system takes you to the **Testers** tab on the Sample Record Test Summary. For more information, see [Maintaining Testers for a Sample Record](#maintaining_testers_for_a_sample_4343).

If an agency view is associated with a sample record test, you can access the agency view instance by selecting the name of the agency view from the **Views** section of the row **Actions** menu. For more information, see [Understanding Agency Views](#mat_understanding_agency_views_h_4566) and [Maintaining Test Associations with Agency Views](#maintaining_test_associations_wi_4192).

When you are finished making changes to the worksheet, click the **Save** button. The system displays a message to confirm that your changes were saved in the database.

***Canceling a Test Run***

To cancel a test run, the system requires that you first enter a remark with a remark type of *Cancelled*. Follow these steps to cancel a test run:

1. Click the link in the **Test Number** field.  
     
   *The system takes you to the General tab of the Sample Record Test Summary*.
2. In the Remarks section at the bottom of the General tab, click the down arrow in the **Type** field, and select *Cancelled*. In the **Remarks** box, type the reason for cancelling the test.
3. Click **Save**.
4. Return to the Maintain Test Queue worksheet
5. Change the setting in the **Test Status** field to *Test Cancelled.*
6. Click **Save**.

**Using the Worksheet to Review Tests**

note2.gif **Note**: If your agency does not use worksheets to manage test queues, see [Reviewing Tests](#reviewing_tests_htm).

The Review Tests component is a worksheet that provides a quick way to review a list of sample record tests and their results. You can then mark a test as reviewed, request a retest, or requeue it.

The worksheet list is filtered to show only those sample record tests appropriate for your user account. For a test to appear in the list, the current user must be a lab tester for the lab unit associated with the sample record test. You must also have a testing qualification for the test method on the sample record tests.

A test is listed only if it has an appropriate test status, as determined by agency options. By default, the test statuses included are *Test Complete*, *Test Approved by Level 1*, and *Test Referred Back to Lab*.

To access this component, select **Review Tests** in the Materials Worksheets component. For information about using the standard features of a worksheet, see [Working with Worksheets](#working_with_worksheets_htm).

To locate a sample record test, type criteria in the Quick Find search box. The system displays rows for sample record tests that match your search criteria.

Each test row displays read-only values in these fields:

* Reportable
* Lab Control Number
* Sample ID
* Lab Ref Num
* Test Description
* Test Number
* Test Result Value
* Test Status
* Actual Completion Date
* Priority
* Due Date
* Material Code
* Material Name
* Test Method
* Sample Type
* Source ID
* Source Name
* Link To
* Sample Remarks
* Test Remarks

To view or record a remark for a sample record or a sample record test, click the link in the appropriate **Remarks** field on that row. The system takes you to the General tab of the Summary component. For more information, see [Recording Remarks](#maintaining_a_sample_record_htm__9995).

To view or edit additional information about a sample record, click the link in the **Sample ID** field on that row. The system takes you to the Sample Record Summary (see [Maintaining a Sample Record](#maintaining_a_sample_record_htm)).

To view or edit additional information about a sample record test, click the link in the **Test Number** field or select **Open Sample Record Test** from the Views section of the Actions menu on that row. The system takes you to the Sample Record Test Summary (see [Maintaining Sample Record Tests](#maintaining_sample_record_tests__6439).

To mark a test as reviewed by Level 1, select **Mark Test Reviewed By Level 1** from **Tasks** section of the row **Actions** menu. The system changes the Test Status to *Reviewed By Level 1*. To mark a test as reviewed by Level 1, the test must have a test status of *Test Complete* or higher. If it does not, the **Mark Test Reviewed By Level 1** command is not available unless your active user role is assigned access rights.

To mark a test a reviewed by Level 2, select **Mark Test Reviewed By Level 2** from the **Tasks** section of the row **Actions** menu. The system changes the Test Status to *Reviewed By Level 2*. To mark a test as reviewed by Level 2, the test must have a test status of *Test Complete* or *Reviewed By Level 1*. If it does not, the **Mark Test Reviewed By Level 2** command is not available unless your active user role is assigned access rights.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow. See [Maintaining Alternate Test Workflows](#maintaining_alternate_test_workf_715) for more information.

To return a test to the tester for additional review or comments, select **Requeue Test** from the **Tasks** section of the row **Actions** menu. The system changes the test status to *Requeued* and the **Test Requeued** field to *Yes*. See [Entering Test Results](#maintaining_testers_for_a_sample_4343) for more information.

To view a list of testers assigned to a test, select **Testers** from the Views section of the row **Actions** menu. The system takes you to the **Testers** tab on the Sample Record Test Summary. See [Maintaining Testers for a Sample Record Test](#maintaining_testers_for_a_sample_4343) for more information.

To create a .csv file that compares results from sample record tests and associated agency views, click the **Generate Test Results Comparison** button. For more information, see [Generating Test Results Comparison](#generating_test_results_comparis_4023).

***Requesting a Retest***

To request that a test be retested, follow these steps:

1. Locate the test you want to retest in the worksheet.
2. Select **Request Retest** from the **Tasks** section of the row **Actions** menu.  
     
   *The system opens a modal window for requesting a retest.*
3. In the **Number of Retests** field, enter the number of times you want this test to be performed again.
4. The lower portion of the window lists qualified testers who are also lab testers for the lab unit associated with the test. Select one or more testers to perform the test.    
     
   *The system adds a check mark at the beginning of the row. You can click the row again to clear the selection. Continue selecting testers as needed.*
5. When you are finished, click the **Save** button.  
     
   *The system creates and saves the number of retests you specified. Each new retest is a modifiable copy of the original sample record test. All of the information from the original test is copied with the following exceptions. On the new retests, the* ***Test Results Value*** *field and the* ***MAA*** *check box are cleared. The* ***Retest Test*** *field is set to Yes, the* ***Retest Qty*** *field remains zero, and the* ***Retest Requested*** *remains No. The test status for the new retests is set to Retest. The names of the testers you assigned to the retests are entered in the* ***Tester ID*** *field. The retests are numbered with the same base number as the original test appended with a decimal point and incremental numbers. For example, if two retests are requested for test number 3.0, the retests are numbered 3.1 and 3.2.  
     
   On the original test, the* ***Retest Test*** *field remains set to No, the number of retests requested is entered in the* ***Retest Qty*** *field, and the* ***Retest Requested*** *field is set to Yes. The test status of the original test is set to Being Retested. When the original test is displayed on the Sample Record Test Summary, the* ***Retests*** *tab is displayed (see* [*Viewing Retests for a Sample Record Test*](#viewing_retests_for_a_sample_rec_2703)*).*  
     
   *For each tester assigned to a retest, the system adds a new row to the* ***Testers*** *tab on the Sample Record Summary.*  
     
   *If an agency view is associated with the original sample record test, the system copies the agency view instance to the retest (see* [*Maintaining Test Associations with Agency Views*](#maintaining_test_associations_wi_4192)*).*

**Using the Worksheet to Review Samples**

note2.gif **Note**: If your agency does not use worksheets to manage test queues, see [Reviewing Samples](#reviewing_samples_htm).

The Review Samples component is a worksheet that provides a quick way to review a list of sample records and related test results. After reviewing a sample record, you can then approve or authorize it, or return a test to the lab as needed.

The Review Samples worksheet lists all sample records that have an authorizable sample status or a status of *Pending Authorization* and for which you are an approved product group sample reviewer.

A sample record is not listed if all of its tests are set to Autofinalize and have an autofinalizable Test Result Value. If a sample record has been split and is set to Authorize as Group, none of the splits in the sample record group are displayed in the worksheet until all of the splits have an authorizable sample status.

To access this component, click the **Review Samples** link in the Materials Worksheets component. For information about using the standard features of a worksheet, see [Working with Worksheets](#working_with_worksheets_htm).

To locate a sample record, type criteria in the Quick Find search box. You can also enter a value in the **Lab Control Number** and **Product Group** search boxes to filter the list of sample records. The system displays rows for sample records that match your search criteria.

Each sample row includes an **Actions** button and values in these fields:

* Acceptance Method
* Sample Status
* Sample ID
* Test Status
* Contracts
* Lab Ref Num
* Test Method
* Test Description
* Test Number
* Lab Unit Name
* Material Code
* Material Name
* Sampler
* Sample Type
* Source ID
* Actual Completion Date
* Sample Date
* Lab Control Number
* Seal Number
* Link To
* Sample Remarks
* Test Remarks

To view or record a remark for a sample record or a sample record test, click the link in the appropriate **Remarks** field on that row. The system takes you to the General tab of the Summary component. For more information, see [Recording Remarks](#maintaining_a_sample_record_htm__9995).

To view or edit additional information about a sample record, click the link in the **Sample ID** field or select **Open Sample Record** from the **Views** section of the **Actions** menu on that row. The system takes you to the Sample Record Summary (see [Maintaining a Sample Record](#maintaining_a_sample_record_htm) for more information).

To view or edit additional information about a sample record test, click the link in the **Test Number** field or select **Open Sample Record Test** from the **Views** section of the **Actions** menu on that row. The system takes you to the Sample Record Test Summary (see [Maintaining Sample Record Tests](#maintaingsamplerecord) for more information.

To return a test for further review, select **Send Test Back to Lab** from the **Tasks** section of the **Actions** menu on the sample row. The system changes the test status to *81: Test Referred Back to Lab* and the sample status to *In Testing*. The changes are saved automatically.

To void a sample record, set the Sample Status to *Void.* You can only void a sample when the sample record is not authorized and all tests assigned to the sample record have either been cancelled or completed.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow.

To view or change the reference specification associated with a sample record test, select **Reference Specifications** from the **Views** section of the **Actions** menu on the test row. The system takes you to the **Reference Specifications** tab on the Sample Record Test Summary.

To create a .csv file that compares results from sample record tests and associated agency views, click the **Generate Test Results Comparison** button below the list.

***Authorizing a Sample Record***

You can choose to authorize a sample record to prevent further changes. This provides a measure of control that might be appropriate for your agency's workflow and security needs.

To authorize a sample record, the sample must have an acceptance method and an authorizable sample status. If the sample record has been split and is set to Authorize as Group, all splits from the sample record are authorized and unauthorized as a group. All splits from the same sample record must be in an authorizable sample status in order to be authorized as a group.

To authorize a sample record, follow these steps:

1. Indicate the acceptance method used to authorize the sample by selecting a value in the **Acceptance Method** field.
2. Select **Authorize** from the **Tasks** section of the **Actions** menu on the sample row.

*The system sets the* ***Authorized By*** *field to the current user, sets the* ***Authorized Date*** *field to the current date and time, and removes the sample record from the list on the Review Samples component. The sample record is now read-only, although you can add remarks of the remark type Disposition. If the selected sample record is part of a split sample record group that is set to authorize as a group, all of the splits are also authorized. The changes are saved automatically.*

After authorization, the sample record becomes read-only, and the system removes it from all sample queues (Receive at Destination Lab, Receive at Lab Unit, Maintain Test Queue, Enter Test Results, Review Tests, and Review Samples). Subsequent changes can only be made by creating a sample record revision (see [Revising an Authorized Sample Record](#revisingauthorizedsamplerecords)) or by unauthorizing the sample record (see [Maintaining a Sample Record](#maintaingsamplerecord)).

**Lists**

**Using Lists to Manage Test Queues**

If your agency has configured the system to use list components to manage sample record tests and test queues, you can access test queues by clicking the appropriate link in the Materials component. If your agency uses worksheets, see [Using Worksheets to Manage Test Queues](#using_worksheets_to_manage_test__2779).

For more information about using list components for test queues, click the following links:

* [Receiving Samples at a Destination Lab](#receiving_samples_at_a_destinati_8944)
* [Receiving Samples at a Lab Unit](#receiving_samples_at_a_lab_unit__4499)
* [Entering Test Results](#entering_test_results_htm)
* [Maintaining the Test Queue](#maintaining_the_test_queue_htm)
* [Reviewing Tests](#reviewing_tests_htm)
* [Reviewing Samples](#reviewing_samples_htm)

**Receiving Samples at a Destination Lab**

note2.gif **Note:** Receive Sample at Destination Lab is only included in the Materials component if your agency has configured the system to use list components for test queues instead of worksheets. If your agency uses worksheets, see [Using the Worksheet to Receive Samples at a Destination Lab](#using_the_worksheet_to_receive_s_1481).

The Receive Sample at Destination Lab component enables you to review the list of samples and mark them as received at one or more destination labs as needed.

The component lists sample records that have a sample status of *Logged*, *Received at Destination Lab*, or *In Testing*. Sample records are not included in this list if all of the lab units for all the sample record tests are set to have samples bypass the destination lab. Samples that do not bypass the destination lab remain in the list until they are marked as received at all of the parent destination labs for the lab units with which the sample record tests are associated.

If your system is configured to use list components for test queues, you can access the Receive Sample at Destination Lab component by clicking the **Receive Sample At Destination Lab** link in the Materials component.

You can locate a sample by typing criteria in the Quick Find search box. You can also enter a value in the **Destination** **Lab** field to filter the list to show only those samples associated with the specified destination lab that have not yet been marked as received at that destination lab.

Each sample row displays values in these fields:

* Sample ID
* Material
* Lab Control Number
* Lab Ref Num
* Sample Date

To mark one or more sample records as received at a destination lab, first specify the destination lab in the **Receive at Destination Lab** field. Next, click the row for each sample record you want to mark as being received at the selected destination lab. The system adds a check mark at the beginning of the row to indicate it is selected. When you are finished, click the **Mark as Received** button. The system marks the selected sample records as received at the destination lab and displays a message to confirm that your changes were saved.

When you mark a sample record as received, the system changes the sample record sample status. If the destination lab is set up so that sample records continue on to a lab unit, the system changes the sample status to *Received at Destination Lab*. If the destination lab is set up so that sample records bypass the lab unit, the system changes the sample status to *In Testing*, changes the sample record test status to *10 — Test in Queue*, and enters the current date in the **Received** field on the Enter Test Results component.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow. See [Maintaining Alternate Test Workflows](#maintaining_alternate_test_workf_715) for more information.

**Receiving Samples at a Lab Unit**

note2.gif **Note:** Receive Sample at Lab Unit is only included in the Materials component if your agency has configured the system to use list components for test queues instead of worksheets.

The Receive Sample at Lab Unit component enables you to review a list of samples and mark them as received at one or more lab units for which you are a qualified lab tester.

For you to view a sample record on this component, you must be specified as a lab tester for the lab unit on the associated sample record tests. You must also have a testing qualification for the test method on the associated sample record tests.

The component lists sample records that have either been marked as *Received at the Destination Lab*, or if the associated lab unit is set to have samples bypass the destination lab, have a sample records status of *Logged*. If the sample record has already been received in one lab unit and is waiting to be received in another lab unit, it will have a status of *In Testing*. Sample records are not included in this list if the lab unit is set to bypass. Sample records that do not bypass lab units remain in the list until they are marked as received at all of the associated lab units.

If your system is configured to use list components for test queues, you can access the Receive Sample at Lab Unit component by clicking the **Receive Sample At Lab Unit** link in the Materials component.

You can locate a sample by typing criteria in the Quick Find search box. You can also enter a value in the **Lab Unit** field to filter the list to show only samples associated with the specified lab unit that have not yet been marked as received at that lab unit. The **Lab Unit** field allows you to select only the lab units for which you are designated as a lab tester.

Each sample row displays values in these fields:

* Sample ID
* Material
* Lab Control Number
* Lab Ref Num
* Sample Date

To mark one or more sample records as received at a lab unit, first specify the lab unit in the **Receive at Lab Unit** field. Next, click the row for each sample record you want to mark as being received at the selected lab unit. The system adds a check mark at the beginning of the row to indicate it is selected. When you are finished, click the **Mark as Received** button. The system marks the selected sample records as received at the lab unit and displays a message to confirm that your changes were saved.

When you mark a sample record as received, the system changes the sample status to *In Testing*, changes the sample record test status to *10 — Test in Queue*, and enters the current date in the **Received** field on the Enter Test Results component.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow.

**Entering Test Results**

note2.gif **Note:** Enter Test Results is only included in the Materials component if your agency has configured the system to use list components for test queues instead of worksheets. If your agency uses worksheets, see [Using the Worksheet to Enter Test Results](#using_the_worksheet_to_enter_tes_7125).

The Enter Test Results component lists tests for sample records that are currently in testing or in the testing queue, enabling you to mark a test as complete when appropriate.

For you to view a test on this component, you must be specified as a lab tester for the lab unit associated with the sample record test. You must also have a testing qualification for the test method on the sample record tests. Tests with a status of *Test Requeued* or *Retest* are listed first.

note2.gif **Note:** Agency options determine which test statuses are considered appropriate for a test to be displayed on the Enter Test Results component. By default, the test statuses included are *Test in Queue*, *Test Requeued*, *Being Retested*, and *Retest*. When a test has one of the selected test statuses, the associated sample record status is set to *In Testing*.

If your system is configured to use list components for test queues, you can access the Enter Test Results component by clicking the **Enter Test Results** link in the Materials component. You can locate a sample record test by typing criteria in the Quick Find search box. You can also enter a value in the **Lab Unit** field to filter the list of tests. The system displays test rows that match your criteria.

Each test row includes an **Actions** button and shows values in these fields:

* Test Number
* Test Description
* Test Status
* Priority
* Sample ID
* Lab Control Number
* Lab Ref Num
* Remarks

You can expand a test row to show values in these additional fields:

* Lab Unit
* Planned Test Start Date
* Due Date
* Source
* Sampler
* Sample Record Remarks
* Received
* Test Start Date
* Actual Completion Date
* Facility
* Material

For materials or material categories with an action relationship that has a value in the **Test Start Duration** field, the system automatically enters a **Planned Test Start Date**. The planned start date is calculated by adding the **Test Start Duration** value to the sample date. You can change the **Planned Test Start Date** if needed. When you are finished, click the **Save** button.

To enter a test result or change other information for a sample record test, select **Open** from the **Actions** menu on the test row. The system takes you to the **General** tab on the Sample Record Test Summary. For more information, see [Maintaining Sample Record Tests](#maintaingsamplerecord).

To view the testers assigned to perform a sample record test, select **Testers** from the **Actions** menu on the test row. The system takes you to the **Testers** tab on the Sample Record Test Summary.

To view the reference specifications associated with a sample record test, select **Reference Specifications** from the **Actions** menu on the test row. The system takes you to the **Reference Specifications** tab on the Sample Record Test Summary.

To change a test status to complete, select **Mark Test Complete** from the **Actions** menu on the test row. The system saves the change automatically and sets the **Actual Completion Date** to the current date.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow.

If an agency view is associated with a sample record test, you can access the agency view instance by selecting the name of the agency view from the **Actions** menu on the test row.

To enter or maintain test results for sieve analysis, select **FACA Test Results** from the **Actions** menu on the test row. This command is available only when the FACA Test Results agency view is associated with the reference test and marked as the active agency view for the test.

**Maintaining the Test Queue**

note2.gif **Note:** Maintain Test Queue is only included in the Materials component if your agency has configured the system to use list components for test queues instead of worksheets. If your agency uses worksheets, see [Using the Worksheet to Maintain Test Queues](#using_the_worksheet_to_maintain__3192).

The Maintain Test Queue component lists tests for sample record tests that are currently in testing or in the testing queue. You can use this component to split a sample record, add tests or test runs to a sample record, or cancel tests as needed.

The list is filtered to show only those sample record tests appropriate for your user account. For a test to appear in the list, the current user must be a lab tester for the lab unit associated with the sample record test.

The component lists only sample records that have an appropriate status, as determined by agency options. By default, the sample record statuses included are *Pending*, *Logged*, *Received at Destination Lab*, *Received at Lab Unit*, and *In Testing*.

If your system is configured to use lists for test queues, you can access the Maintain Test Queue component by clicking the **Maintain Test Queue** link in the Materials component.

You can locate a sample record test by typing criteria in the Quick Find search box. You can also enter a value in the **Lab Unit ID** field to filter the list to show only tests associated with the selected lab unit. The system displays sample rows that match your criteria.

Each sample row includes an **Actions** button and values in these fields:

* Sample ID
* Material
* Lab Ref Num
* Sample Type
* SMFMI
* Tests
* Remarks

To view or edit additional information about a sample record, select **Open** from the **Actions** menu on the sample row. The system takes you to the Sample Record Summary. See [Maintaining a Sample Record](#maintaingsamplerecord) for more information.

To assign tests to a sample record, select **Assign Tests** from the **Actions** menu on the sample row. The system takes you to the Assign Tests guided process.

To split a sample record into one or more editable copies, select **Split Sample Record** from the **Actions** menu on the sample row.

To display rows for tests assigned to a sample record, click the arrow to expand the sample row. The system lists a row for each test run assigned to the sample record. Each test row includes an **Actions** button and values in these fields:

* Test Number
* Test
* Test Status
* Priority
* Lab Unit
* Planned Test Start
* Due
* Remarks

You can expand a test row to show additional information about the test. You can view or change information in these fields:

* Test Number
* Test
* Lab Unit
* Planned Test Start Date
* Due Date
* Reportable
* Test Status
* Priority
* Charge Amount
* Test Start Date
* Actual Completion Date
* Counts Toward MAA

For materials or material categories with an action relationship that has a value in the **Test Start Duration** field, the system automatically enters a **Planned Test Start Date**. The planned start date is calculated by adding the **Test Start Duration** value to the sample date. You can change the **Planned Test Start Date** if needed.

If needed, you can clear or select the **Reportable** and **MAA** check boxes. When the **Reportable** check box is cleared, the system automatically clears the **MAA** check box and makes it read-only. When you select the **Reportable** check box, you can modify the value for the **MAA** check box.

To record a remark, you must first select the type of remark from the Type field, then enter explanatory text in the Remark text box.

When you are finished making changes, click the **Save** button. The system displays a message to confirm that your changes were saved in the database.

To add another test run for an existing test, select **Add Test Run** from the **Actions** menu on the test row. The **Add Test Run** command is not available for tests that are marked as required. The system duplicates the row, increments the test number by one, and saves the change automatically.

To cancel a test run, expand the test row and change the setting in the **Test Status** field to *Test Cancelled*. To save the cancelation, the system requires that you enter a remark with a remark type of *Cancelled*. In the Remarks section of the row, click the down arrow in the **Type** field, and select *Cancelled*. In the **Remarks** box, type the reason for cancelling the test. Click **Save** to save the change.

To view or edit additional information about a sample record test, select **Open** from the **Actions** menu on the test row. The system takes you to the **Testers** tab on the Sample Record Test Summary.

**Reviewing Tests**

note2.gif **Note:** Review Tests is only included in the Materials component if your agency has configured the system to use list components for test queues instead of worksheets. If your agency uses worksheets, see [Using the Worksheet to Review Tests](#using_the_worksheet_to_review_te_4452).

The Review Tests component enables you to review a list of sample record tests and their results. You can then mark a test as reviewed, request a retest, or requeue it.

The list on the Review Tests component is filtered to show only those sample record tests appropriate for your user account. For a test to appear in the list, the current user must be a lab tester for the lab unit associated with the sample record test. You must also have a testing qualification for the test method on the sample record tests.

A test is listed only if it has an appropriate test status, as determined by agency options. By default, the test statuses included are *Test Complete*, *Test Approved by Level 1*, and *Test Referred Back to Lab*.

You can access this component by clicking the **Review Tests** link in the Materials component. Each test row displays read-only values in these fields:

* Test Number
* Test Description
* Status
* Test Result Value
* Sample ID
* Material
* Lab Unit
* Priority
* Remarks

You can expand a test row to display additional information. You can view or change information in these fields:

* Test Number
* Test Method
* Test Description
* Test Result Value
* Test Status
* Priority
* Due Date
* Actual Completion Date
* Retest Test
* Retest Requested
* Sample ID
* Material
* Source
* Lab Unit
* Sample Type
* Lab Control Number
* Lab Reference Number
* Sampler
* Test Requeued
* Reportable
* MAA

Click in a field and add, change, or delete information as needed.

You can add remarks in the **Remarks** box. To add a remark, first select the type of remark from the Type field, and then enter a comment in the Remarks text box.

If needed, you can clear or select the **Reportable** and **MAA** check boxes. When the **Reportable** check box is cleared, the system automatically clears the **MAA** check box and makes it read-only. When you select the **Reportable** check box, you can modify the value for the **MAA** check box. At least one test that has not been cancelled must be marked as reportable.

The **Test Result Value** field might be editable depending on the access level assigned to your user role, the setting for the *Allow Test Result Value Modification During Test Review State* agency option, the current test status, and the setting for the *Enter Test Results* agency option. Otherwise, the **Test Result Value** field is read-only. If you modify the **Test Result Value**, you are required to enter a remark.

When you are finished making changes, click the **Save** button.

To view or change additional information about a sample record test, click the **Test Number** link, or select **Open** from the **Actions** menu on the test row. The system takes you to the Sample Record Test Summary. See [Maintaining Sample Record Tests](#maintaingsamplerecord) for more information.

To mark a test as reviewed by Level 1, select **Mark Test Reviewed By Level 1** from the **Actions** menu on the test row. The system changes the Test Status to *Reviewed By Level 1*. To mark a test as reviewed by Level 1, the test must have a test status of *Test Complete* or higher. The **Mark Test Reviewed By Level 1** command is not available unless your active user role is assigned access rights.

To mark a test a reviewed by Level 2, select **Mark Test Reviewed By Level 2** from the **Actions** menu on the test row. The system changes the Test Status to *Reviewed By Level 2*. To mark a test as reviewed by Level 2, the test must have a test status of *Test Complete* or *Reviewed By Level 1*. The **Mark Test Reviewed By Level 2** command is not available unless your active user role is assigned access rights.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow.

To request that a test be retested, select **Request Retest** from the **Actions** menu on the test row. See [Requesting a Retest](#reviewing_tests_htm_requesting_a_4201) for more information.

To return a test to the tester for additional review or comments, select **Requeue Test** from the **Actions** menu on the test row. The system changes the test status to *Requeued* and the **Test Requeued** field to *Yes*. See [Entering Test Results](#entering_test_results_htm) for more information.

To view the original test associated with a retest, select **Original Test** from the **Actions** menu on the retest row. The **Original Test** command is available only on tests that are retests. The system takes you to the **General** tab on the Sample Record Test Summary.

To view a list of retests requested for a test, select **View Retests** from the **Actions** menu on the test row. The **View Retests** command is available only on tests for which retests have been requested. The system takes you to the **Retests** tab on the Sample Record Test Summary.

To view sample remarks, select **Sample Remarks** from the **Actions** menu on the test row. The system takes you to the **General** tab on the Sample Record Summary. See [Maintaining a Sample Record](#maintaingsamplerecord) for more information.

To view a list of testers assigned to a test, select **Testers** from the **Actions** menu on the test row. The system takes you to the **Testers** tab on the Sample Record Test Summary.

If an agency view is associated with a sample record test, you can access the agency view instance by selecting the agency view name from the **Actions** menu on the test row. If the current test status is not selected for the *Enter Test Results* agency option, or if the agency view was used to enter data but the agency view association is now inactive, you can view but not add or modify data displayed in the agency view instance.

To create a .csv file that compares results from sample record tests and associated agency views, click the **Generate Test Results Comparison** button.

***Requesting a Retest***

To request a retest, perform these steps:

1. On the Review Tests component, select **Request Retest** from the **Actions** menu on the test row.  
     
   *The system opens a modal window for requesting a retest.*
2. In the **Number of Retests** field, enter the number of times you want this test to be performed again.
3. The lower portion of the window lists qualified testers who are also lab testers for the lab unit associated with the test. Select one or more testers to perform the test.    
     
   *The system adds a check mark at the beginning of the row. You can click the row again to clear the selection. Continue selecting testers as needed.*
4. When you are finished, click the **Save** button.  
     
   *The system creates and saves the number of retests you specified. Each new retest is a modifiable copy of the original sample record test. All of the information from the original test is copied with the following exceptions. On the new retests, the* ***Test Results Value*** *field and the* ***MAA*** *check box are cleared. The* ***Retest Test*** *field is set to Yes, the* ***Retest Qty*** *field remains zero, and the* ***Retest Requested*** *remains No. The test status for the new retests is set to Retest. The names of the testers you assigned to the retests are entered in the* ***Tester ID*** *field. The retests are numbered with the same base number as the original test appended with a decimal point and incremental numbers. For example, if two retests are requested for test number 3.0, the retests are numbered 3.1 and 3.2.  
     
   On the original test, the* ***Retest Test*** *field remains set to No, the number of retests requested is entered in the* ***Retest Qty*** *field, and the* ***Retest Requested*** *field is set to Yes. The test status of the original test is set to Being Retested. When the original test is displayed on the Sample Record Test Summary, the* ***Retests*** *tab is displayed.*

*For each tester assigned to a retest, the system adds a new row to the* ***Testers*** *tab on the Sample Record Summary.*  
  
*If an agency view is associated with the original sample record test, the system copies the agency view instance to the retest.*

**Reviewing Samples**

note2.gif **Note:** Review Samples is only included in the Materials component if your agency has configured the system to use list components for test queues instead of worksheets. If your agency uses worksheets, see [Using the Worksheet to Review Samples](#using_the_worksheet_to_review_sa_3619).

The Review Samples component enables you to review a list of sample records and related test results. After reviewing a sample record, you can then approve or authorize it, or return a test to the lab as needed.

The Review Samples component lists all sample records that have an authorizable sample status or a status of *Pending Authorization* and for which you are an approved product group sample reviewer.

A sample record is not listed if all of its tests are set to Autofinalize and have an autofinalizable Test Result Value. If a sample record has been split and is set to Authorize as Group, none of the splits in the sample record group are displayed on the Review Samples component until all of the splits have an authorizable sample status.

If your system is configured to use lists for test queues, you can access this component by clicking the **Review Samples** link in the Materials component.

You can locate a specific sample record on the Review Samples component by typing criteria in the Quick Find search box. You can also enter a value in the **Lab Control Number** and **Product Group** fields to filter the list of sample records. The system displays rows for sample records that match your search criteria.

Each sample row includes an **Actions** button and values in these fields:

* Sample ID
* Lab Control Number
* Lab Ref Num
* Sample Type
* Remarks
* Tests
* Source
* Material
* Sampler
* Acceptance Method
* Sample Status

To display rows for tests assigned to a sample record, click the arrow to expand the sample row. The system lists a row for each test run assigned to the sample record. Each test row includes an **Actions** button. You can view but not change values in these fields:

* Test Number
* Test
* Lab Unit
* Remarks
* Test Status
* Actual Completion
* Test Result Value

To view or edit additional information about a sample record, click the **Remarks** link or select **Open** from the **Actions** menu on the sample row. The system takes you to the Sample Record Summary. See [Maintaining a Sample Record](#maintaingsamplerecord) for more information.

To authorize a sample record, select **Authorize** from the **Actions** menu on the sample row. See [Authorizing a Sample Record](#reviewing_samples_htm_authorizin_4107).

To enable changes to an authorized sample record by creating an editable copy of the sample record with a new sample ID, select **Revise** from the **Actions** menu on the sample row. See [Revising an Authorized Sample Record](#revisingauthorizedsamplerecords).

To void a sample record, set the Sample Status to *Void.* You can only void a sample when the sample record is not authorized and all tests assigned to the sample record have either been cancelled or completed.

To return a test for further review, select **Send Test Back to Lab** from the **Actions** menu on the test row. The system changes the test status to *81: Test Referred Back to Lab* and the sample status to *In Testing*. The changes are saved automatically.

note2.gif **Note:** Whenever a sample record test status is changed, the system checks for the presence of a matching alternate test workflow. If one is found, the system changes the test status to the status indicated by the alternate test workflow.

To view or edit information about a sample record test, select **Open** from the **Actions** menu on the test row (or you can click the **Test Number** link or the **Remarks** link on the test row). The system takes you to the Sample Record Test Summary.

To view or change the reference specification associated with a sample record test, select **Reference Specifications** from the **Actions** menu on the test row. The system takes you to the **Reference Specifications** tab on the Sample Record Test Summary.

If an agency view is associated with a sample record test, you can access the agency view instance by selecting **Agency View** from the **Actions** menu on the test row. If the current test status is not selected for the *Enter Test Results* agency option, or if the agency view was used to enter data but the agency view association is now inactive, you can view but not add or modify data displayed in the agency view instance.

To create a .csv file that compares results from sample record tests and associated agency views, click the **Generate Test Results Comparison** button.

***Authorizing a Sample Record***

You can choose to authorize a sample record to prevent further changes. This provides a measure of control that might be appropriate for your agency's workflow and security needs.

To authorize a sample record, the sample must have an acceptance method and an authorizable sample status. If the sample record has been split and is set to Authorize as Group, all splits from the sample record are authorized and unauthorized as a group. All splits from the same sample record must be in an authorizable sample status in order to be authorized as a group.

After authorization, the sample record becomes read-only, and the system removes it from all sample queues (Receive at Destination Lab, Receive at Lab Unit, Maintain Test Queue, Enter Test Results, Review Tests, and Review Samples). Subsequent changes can only be made by creating a sample record revision (see [Revising an Authorized Sample Record](#revisingauthorizedsamplerecords)) or by unauthorizing the sample record (see [Maintaining a Sample Record](#maintaingsamplerecord)).

To authorize a sample record, follow these steps:

1. Navigate to either the Sample Record Summary or the Review Samples component.
2. Indicate the acceptance method used to authorize the sample by selecting a value in the **Acceptance Method** field.
3. If you are on the Sample Record Summary, select **Authorize** from the **Actions** menu on the component header. If you are on the Review Samples component, select **Authorize** from the **Actions** menu on the sample row.

*The system sets the* ***Authorized By*** *field to the current user, sets the* ***Authorized Date*** *field to the current date and time, and removes the sample record from the list on the Review Samples component. The sample record is now read-only, although you can add remarks of the remark type Disposition. If the selected sample record is part of a split sample record group that is set to authorize as a group, all of the splits are also authorized. The changes are saved automatically.*

**Role-Based Workflows**

This section provides a role-based orientation to the AASHTOWare Project Materials system. If you are new to the system, these topics will help you learn how to navigate through the system to perform the tasks and key business functions for your role.

note2.gif **Note:** If you are logging on to the system for the first time, it is recommended that you review the topics in the [Getting Started](#overview_of_getting_started_htm) section before reviewing these topics. Getting Started topics describe how to use the features in the software to complete basic tasks, and will help you to understand the instructions provided in *Role-Based Workflows*. If you haven't already, it is also helpful to take a few minutes to learn how the online Help system works by reading [Using Online Help](#using_online_help_htm).

Step by step instructions are provided for the following roles:

* Materials User

**Materials User — Create sample, assign tests, receive sample, enter test results, review tests, review and modify sample**

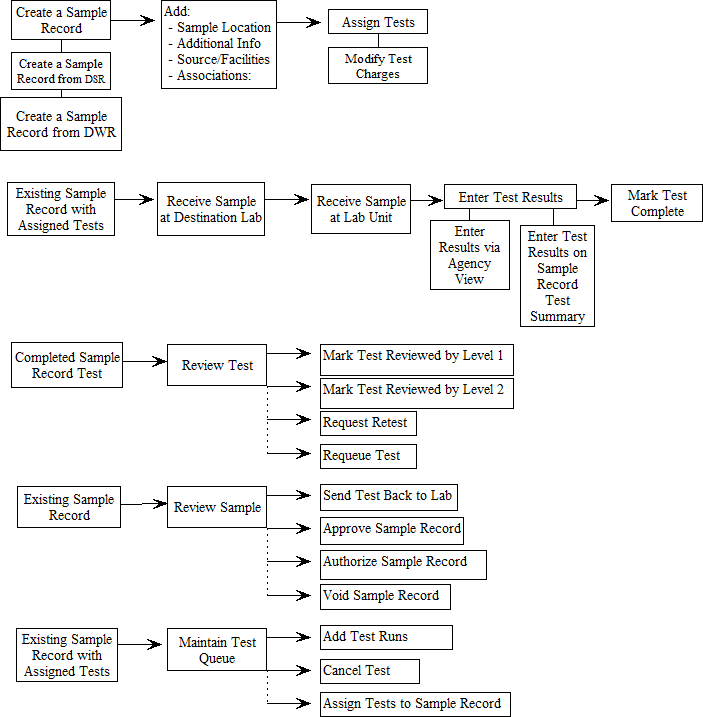


Figure A-1. Materials User Workflow

1.    Create a sample record.

a.    On the Materials component, click the **Sample Records** link.

b.    On the Sample Record Overview, select **Add** from the **Actions** menu on the component header (see [Creating a Sample Record](#creatingsamplerecord)).

2.    Create a sample record from a Daily Source Report (DSR).

a.    On the Materials component, click the **Daily Source Reports** link.

b.    On the Daily Source Report Overview, locate the DSR row, and click the **Remarks** link.

c.     On the Daily Source Report Summary, click the **Materials** tab.

d.    On the **Materials** tab, locate the appropriate material, and expand the row.

e.    On the row for the SMFMI from which you want to create a sample, select **Create New Sample Record** from the **Actions** menu.

3.    Create a sample record from a Daily Work Report (DWR).

a.    On the Construction component, click the **Daily Work Reports** link.

b.    On the Daily Work Report Overview, locate the DWR row and, click the **Sequence** link.

c.     On the Contract Daily Work Report Summary, click the **Acceptance Records** tab.

d.    On the **Acceptance Records** tab, locate the appropriate item posting, and expand the row.

e.    On the row for the acceptance record from which you want to create a sample, select **Create New Sample Record** from the **Actions** menu.

4.    Add the sample location information to the sample record.

a.    On the Add Sample Record component, click the **Sample Location** tab

5.    Add additional information to the sample record.

a.    On the Add Sample Record component, click the **Additional Information** tab.

6.    Add Primary Source and Facility and additional sources and facilities to the sample record.

a.    On the Add Sample Record component, click the **Sources/Facilities** tab.

7.    Add sample associations: destination labs, inspection agencies, person identifications, and limited sample access roles.

a.    On the Add Sample Record component, click the **Associations** tab.

8.    Add a contract to the sample record.

a.    On the Materials component, click the **Sample Records** link.

b.    On the Sample Record Overview, locate the sample record, and click the **Sample ID** link.

c.     On the Sample Record Summary, click the **Contract** tab.

9.    Assign tests to the sample record.

a.    On the Sample Record Summary, click the **Tests** tab.

b.    Click the **Assign Tests** button.

c.     On the Assign Sample Record Test component, select tests to add to the sample.

10.           Modify a test charge.

a.    On the Sample Record Summary, click the **Test Charges** tab.

11.           Receive the sample at the destination lab.

a.    On the Materials component, click the **Receive Sample at Destination Lab** link.

b.    On the Receive Sample at Destination Lab component, enter a value in the **Receive at Destination Lab** field.

c.     Click one or more rows for the sample records you want to mark as received at the selected destination lab.

d.    Click the **Mark as Received** button on the component header (see [Receiving Samples at a Destination Lab](#receiving_samples_at_a_destinati_8944)).

12.           Receive the sample at the lab unit.

a.    On the Materials component, click the **Receive Sample at Lab Unit** link.

b.    On the Receive Sample at Lab Unit component, enter a value in the **Receive at Lab Unit** field.

c.     Click one or more rows for the sample records you want to mark as received at the selected lab unit.

d.    Click the **Mark as Received** button on the component header (see [Receiving Samples at a Lab Unit](#receiving_samples_at_a_lab_unit__4499).

13.           Enter test results and mark a sample record test complete.

a.    On the Materials component, click the **Enter Test Results** link.

b.    On the Enter Test Results component, locate the sample record test and expand the row.

c.     Click the link in the **Test Number** field.

d.    On the Sample Record Test Summary, enter the test result on the **General** tab.

i.      To enter additional test results, select the agency view name link from the **Actions** menu on the component header.

e.    Click the **Testers** tab to add tester information.

f.      Click the **Reference Specifications** tab to view reference specifications for the test.

g.    When the record is complete, select **Mark Test Complete** from the **Actions** menu on the component header.

h.    See [Entering Test Results](#entering_test_results_htm).

14.           Review completed tests.

a.    On the Materials component, click the **Review Tests** link.

i.      Mark a test as reviewed by level 1.

1)   On the Review Tests component, locate the sample record test, and select **Mark Test Review by Level 1** from the **Actions** menu on the test row.

ii.    Mark a test as reviewed by level 2.

1)   On the Review Tests component, locate the sample record test, and select **Mark Test Review by Level 2** from the **Actions** menu on the test row.

iii.  Request a retest of a test.

1)   On the Review Tests component, locate the sample record test, and select **Request Retest** from the **Actions** menu on the test row.

iv.  Requeue a test and indicate whether tests are reportable or not reportable.

1)   On the Review Tests component, locate the sample record test and select **Requeue Test** from the **Actions** menu on the test row.

v.    See [Reviewing Tests](#reviewing_tests_htm).

15.           Review samples that have an authorizable status.

a.    On the Materials component, click the **Review Samples** link.

b.    On the Review Samples component, locate the sample, and expand the sample row (see [Reviewing Samples](#reviewing_samples_htm)).

i.      Send a test back to the lab.

1)   Select **Send Test Back to Lab** from the sample record test row **Actions** menu.

ii.    Authorize a sample record.

1)   Select **Authorized** from the sample record row **Actions** menu.

iii.  Approve a sample record.

1)   Select **Approved** in the **Sample Status** field.

iv.  Void a sample record.

1)   Select **Void** from the **Actions** menu on the sample record row.

16.           Maintain test queue - assign tests to a sample record.

a.    On the Materials component, click the **Maintain Test Queue** link.

b.    On the Maintain Test Queue component, locate the sample, and expand the sample row.

i.      Add a test run to a sample test.

1)   Locate the row for the test you want to run again, and select **Add Test Run** from the row **Actions** menu.

ii.    Cancel a test.

1)   Locate the test you want to cancel, and expand the test row.

2)   Select **0 – Test Cancelled** in the **Test Status** field.

iii.  Modify information for a sample record test.

1)   Locate the test you want to modify, and expand the test row.

2)   Modify any editable field, such as **Lab Unit**, **Test Status**, **Priority**, or **Charge Amount**.

iv.  Assign tests to a sample record.

1)   Select **Assign Tests** from the sample record row **Actions** menu.