

Creating & Maintaining Sample Records

Additional Quick Reference Guides, training documents, and the Construction and Materials User Guides are available from ODOT.

Role(s): Field Lab Technician, Field Lab Manager, Residency Administration, Project Inspector, Project Manager, Central Lab Admin, Central Lab Technician, Central Lab Supervisor, Central Lab Manager, and Independent Assurance



Creating a Sample Record with Required Fields:

1. From the **Materials** component, click the **Sample Records** link.
2. Click the component **Actions** menu and click **Add**. The system displays the Add Sample Record component.
 - **Note:** ODOT configured the system to auto-generate a read-only Sample ID upon save.
 - **Note:** ODOT requires the fields with a red asterisk next to the field label to be populated prior to saving. These required fields include Material Code – Name, Administrative Office, Sample Date, and Facility ID. ODOT moved the Facility ID field to the General tab from the Additional Information tab to require users to enter it for every sample.
3. In the **Material Code – Name** field, search for and select the code associated with the sampled material.
4. In the **Administrative Office** field, search for and select your administrative office level.
5. In the **Sample Date** field, select the date the material was sampled.
6. In the **Primary Facility** section, click the **Select Primary Facility** button. The system displays the Select Primary Facility modal.
7. Search for and select the primary facility that provided the sampled material.



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8. Click the **Save** button.
 - **Note:** The following changes have occurred:
 - **Note:** The system generated the Sample ID.
 - **Note:** The Primary Facility section is no longer visible from the General panel.
 - **Note:** The Facility ID – Facility Name entry has been populated on the Sources/Facilities panel.
 - **Note:** The Sampler ID – Name field is now visible and indicates that it is required by policy.
 - **Note:** The system displays the message, “Sample Record: Test(s) may not be assigned to Sample Records without a Destination Lab association on the Associations tab” until a destination lab has been assigned. This will be covered in a later step.
 - **Note:** The system changed the Sample Status to Pending.

Adding General Information to the Sample Record:

1. In the **Sampler ID – Name** field, search for and select the person who collected the sample.
 - **Note:** To search, you must enter either the first name, last name, or ID. Do not enter a combination to search. Users must record the sampler as required by policy. For a name to be available on this list, the person must have an appropriate sampling qualification associated with their Person record.
2. In the **Sample Type** field, select the purpose of taking the sample.
 - **Note:** Use the Sampling and Testing Status report to confirm selection.
3. In the **Acceptance Method** field, select the party responsible for accepting the sample.
 - **Note:** Use the Sampling and Testing Status report to confirm the proper selection of the Sample Type and Acceptance Method.



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4. In the **Mix Design Type** field, select the type of mix design.
5. In the **Mix Design ID** field, search for and select the mix design.
 - **Note:** ODOT moved the Mix Design Type and Mix Design ID fields to the General tab from the Additional Information tab.

On the General tab, use the available/optional fields as needed for this sample record.

6. In the **Intended Use** field, enter a description of the intended use of the material.
 - **Note:** ODOT moved the Intended Use field to the General tab from the Additional Information tab.
7. Click the **Save** button.
8. The **Lab Control Number** can be used to link multiple samples with a single ID.
 - **Note:** The Lab Control Number is based on the Sample ID, but it is preceded by the letters CN.
 - **Note:** ODOT moved fields that are critical or crucial for most everybody to use to the area above the blue bar. ODOT moved fields used mostly by Central to the area below the blue bar. The fields below the blue bar include the following:
 - i. **Link To** – The sample identification of the sample record this sample is linked to.
 - ii. **Lab Reference Number** – ODOT uses this field to track alternate sample identifiers assigned by a lab or a third-party.
 - iii. **Control Type** – An identifier for a sample, often used to categorize and used in conjunction with the Control Number field. ODOT uses this field to categorize refinery samples.
 - iv. **Control Number** – The number used in conjunction with the control type to identify the sample.
 - v. **Seal Number** – The number located on the seal for a batch of material sampled.



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- vi. **Sample Size** – The size of the sample taken.
- vii. **Sample Size Units** – Unit of measure for the sample size.
- viii. **Link From** – The sample identification of the sample record this sample is linked from.
- ix. **Authorized By** – The person ID of the user who authorized the sample record.
- x. **Authorized Date** – Date and time the sample record was authorized.
- xi. **Revising Sample ID** – The Sample ID of the sample record that the current sample record is modifying.
- xii. **Revised By** – The Sample ID of the sample record that is the revision of the current sample record.
- xiii. **Remarks**
- xiv. **Remarks Section**
- xv. **Type**
- xvi. **Remark**

Adding Location Information to the Sample Record:

1. Click the **Sample Location** tab.
2. In the **Sampled From** field, indicate where the sample was taken, whether at a source or facility location or at a project location.
3. In the **Sample Origin** field, enter the originating location for the sample, if appropriate.
4. In the **Latitude** field, enter the latitude of the sample location, if appropriate.
5. In the **Longitude** field enter the longitude of the sample location, if appropriate.
6. In the **Distance From Grade (LF)** field, enter the distance from finished grade measurement.



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7. In the **Reference** field, enter a location used to describe another location by giving the relative position or benchmark, if appropriate.
8. In the **Station** field, enter the station where the sample was taken.
9. In the **Offset Distance** field, enter the distance from the centerline to the location of where the sample was taken.
10. In the **Offset Direction** field, click the drop-down arrow and select the direction of where the sample was taken in reference to the centerline.
11. In the **Elevation** field, enter the altitude above sea level or ground level where the sample was taken.
12. In the **Comments** field, enter a comment.
13. Click the **Save** button.

Adding Source and Facility Information to the Sample Record:

1. Click the **Sources/Facilities** tab.
2. In the **Primary Facility** section, notice the facility populated matches the Facility selected in the Add Sample Record Summary.
3. In the **Facility City** field, the system displays the city associated with the default address for the facility.
4. In the **Facility Type** field, the system displays the facility types associated to the facility.
5. In the **Facility Location Description** field, ODOT displays information for portable plants only.
6. In the **SMFMI Name** field, search for and select the desired batch, heat, or lot.
7. In the **Brand Name** field, search for and select the desired brand name.
 - **Note:** ODOT made this conditionally required based on the selected Sample Type.
8. In the **Additional Facilities** section, click the **Select Facilities** button.



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9. In the **Select Facilities** window, search for and select the desired facilities.
 - **Note:** Users may want to select another concrete producer for jobs when the material is coming from another facility.
10. In the **Additional Sources** section, click the **Select Sources** button.
11. In the **Select Sources** window, search for and select the desired sources.
12. Click the **Save** button.

Adding Contract Project Item Material Sets to the Sample Record:

1. Click the **Contract** tab.
 - **Note:** Required by policy for everybody except Central Lab. If an item is not available for selection, please contact ConstructionPrograms@odot.org.
2. Click the **Select Contract Project Items** button. The system displays a modal window for selecting contract project item material sets on contracts for which the current user has contract authority.
 - **Note:** ODOT added the Recommended Material Sets field to filter the material sets recommended for use on the contract.
3. In the **Select Contract Project Items** window, search for and select the desired Contract Project Item Material Sets.
4. Click the **Save** button.
5. On the **Contract** tab, expand a contract row to view rows of associated contract project item material sets.
 - Contract
 - Contract Project Item Material Sets
6. The fields associated with the Material and the Material Set tied to the contract include the following:



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- Project (JPN)
- Item
- Material Set Name
- Federal Project Number
- Contract Item
- Project Item
- Material Unit
- Remarks
- Represented Quantity
- Satisfied Represented Quantity
- Remarks Section
 - i. Type
 - ii. Remark

Assigning the Destination Lab to the Sample Record:

1. Click the **Associations** tab.
 - **Note:** The Material Code – Name, Sample Type, and Destination Lab fields must be selected to assign tests to the sample. Notice the warning.
2. Click the **New** button.
3. In the **Association Type** field, click the drop-down arrow and select Destination Lab.
 - **Note:** ODOT does not use the Inspection Agency and Person Identification choices.



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4. In the **Association Value** field, search for and select the destination lab where the sample will be tested.
5. Click the **Save** button.
 - **Note:** The warning disappears since the sample record now has the key information needed to assign tests.

Assigning Tests to the Sample Record:

1. Click the **Tests** tab.
 - **Note:** View the Material and Sample Type associated to this sample record. These are used to determine the available Tests.
2. Click the **Assign Tests** button.
3. In the **Select Default Tests** section, select the default tests to assign to the sample.
 - **Note:** Pay attention to the following:
 - i. When selected, a green check mark appears to the left of the selected test method.
 - ii. The Lab Unit field indicates the lab where the test will be performed.
 - iii. The Autofinalize field indicates that the review process will be streamlined if the test results are passing and all tests assigned to the sample have the Autofinalize indicator set to Yes.
4. Click the **Next** arrow in the lower right corner of the screen.
5. In the **Select Optional Tests** section, click the **Next** arrow in the lower right corner of the screen.
 - **Note:** This combination of Material, Sample Type, and Destination Lab assigned to this sample record does not have any optional tests to assign.



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6. In the **Add Test Runs and Confirm** section, in the Test Runs field enter the number of test runs to perform for each assigned test on the sample.
 - **Note:** ODOT set the default number of this test to 1 run. In most cases, the Project Manager will use 1 run.
7. Click the **Confirm** button.
8. View the information in the assigned sample record test row.
 - **Note:** To delete a test record row, click the row Actions menu and select Delete.
9. Click the **Save** button.
 - **Tip!** To make it easier to locate the sample record in the Material Worksheets, copy the Sample ID to your clipboard.
 - **Note:** The Additional Information tab includes read-only information that may be useful while auditing the sample record.

Next Steps:

- Needed