General Sampling and Testing Workflow with Most Common Steps

Sample Record Overview

- Component Actions Menu ▼ > Add

Sample Record Summary (1)
GENERAL TAB (1a)

- Enter * Material Code,
  * Sample Date, and * Facility
- Click 'Save' to create Sample ID.
- Enter * Sampler ID, Sample Type, and
  Acceptance Method
- Save

Sample Record Summary
CONTRACT TAB (1d)

- Use Filter to locate Contract.
- Click 'Select Contract Project Item' to
  choose Contract Project Item Material Set
- Expand row ❯ to enter Represented Quantity
- Save

Sample Record Summary
ASSOCIATIONS TAB (1e)

- Click 'New'
- Select Destination Lab from Association Type
- Choose destination lab from Association Value
- Save

Sample Record Summary
TESTS TAB (1f)

- Click 'Assign Tests,' select tests,
  click ➔ , check Autofinalize, click 'Confirm'
- Save
- Select and Copy Sample ID
  (Ctrl+C or right-click Copy)
- Component Actions Menu ▼ >
  Sample Label Report
- Quicklink: Receive at Lab Unit

Receive at Lab Unit (2)

- Use Filter to locate Sample Record.
- Receive at Lab Unit (top field)
- Select ☑ and click 'Mark as Received'
- Quicklink: Enter Test Results

Enter Test Results (3)

- Use Filter to locate Sample Record / Test.
- Row Actions Menu ▼ > Views > *[AgencyView]

Agency View

- Confirm / select Reference Specification.
- Enter Test Data. Save.
- View AV Recommendation
  (In Spec or Out of Spec)
- Select Test Results (Pass or Fail). Save.
- Previous: Enter Test Results

- Select ☑ and click 'Mark Tests Complete'
- Quicklink: Review Tests

Review Tests (5)

- Use Filter in Review Completed Tests
  section to locate Sample Record / Test.
- If needed, familiarize yourself with
  Sample Record and Test.
- Row Actions Menu ▼ > Views > *[AgencyView]
- Select ☑ and click 'Mark Test Reviewed'
- Quicklink: Review Samples

Review Samples (6)

- Use Filter to locate Sample Record.
- If needed, familiarize yourself with
  Sample Record and Test.
- Row Actions Menu ▼ > Views > *[AgencyView]
- 2-Step Process:
  1) Select 'Sample Status' and Save
  2) Select ☑ and click 'Authorize Samples'