Sample Records - Creating a Sample Record from the Dashboard

BACKGROUND: A sample record cannot have tests assigned to it until it has been associated with a Destination Lab.

ROLES: Materials Technician, Materials Lab Supervisor, Materials Lab Technician, Materials Rover

NAVIGATION:

Materials > Sample Records >

1. On the Sample Record Overview page, open the **Component Actions** menu in the upper right corner and click **Add**.
2. In the **Material Code – Name** autocomplete field, begin typing the sample's material and select it when it populates.
3. In the **Sample Date** field, use the date picker to enter today's date.
4. In the **Sample Type** dropdown, select the correct option.
5. Select the **Sources** tab on the left.
6. Click the **Select Primary Source** button.
7. In the Select Primary Source modal window, click in the row of the sample's source to select it, and click the **Add to Sample Record** button.
8. Click **Save** in the upper right corner.

Associating to a Destination Lab

9. On the Sample Record Summary page for the newly-created sample record, select the **Associations** tab on the left.
10. Click the **New** button to create an association.
11. In the **Association Value** autocomplete field, begin typing the name of the sample's Destination Lab and select it when it populates.
12. Click **Save** in the upper right corner.

Associating to a Contract

13. To associate the sample record with a contract, click the **Contract** tab on the left.
14. Click the **Select Contract Project Items** button.
15. The Select Contract Project Items modal window shows all project item material sets that contain the sample record's material, on contracts for which materials and acceptance actions have been generated. Click in the row of the desired contract project item material set to select it, and click the **Save** button at the bottom of the window.

Associating to a Mix Design

16. To associate the sample record with an approved mix design, select the **Mix Design Information** tab on the left.
17. In the **Mix Design Type** dropdown, select the correct option.
18. In the **Mix Design ID** autocomplete field, begin typing the name of the desired mix design and select it when it populates.
19. Click **Save** in the upper right corner.

Adding Tests

20. To add tests to the sample record, select the **Tests** tab on the left.
21. Click the **Assign Tests** button to launch the guided test assignment process.

22. Using the blue arrows in the bottom right for navigation, use the next screens to review required tests and select default and optional tests for the sample record.

23. When you have selected the desired tests, confirm by clicking on the green **Confirm** button. If the guided process does not show you the tests you expect, return to the sample record and check that its Material, Sample Type, and Destination Lab are correct. If that does not fix the problem, check that a test assignment information record exists (see *Global Materials - Test Assignment Information* QRG).