Sample Records - Creating a Sample Record from a DWR

BACKGROUND: When you create a sample record from a contract material acceptance record, the system automatically associates it with the contract project item material set. The system also copies the following data, if present, from the acceptance record to the sample record: Material, Sample Date (from the DWR Date), Sample Type, Acceptance Method, Source, and Represented Quantity. After the sample record's creation, these fields cannot be modified on the acceptance record. A sample record cannot have tests assigned to it until it has been associated with a Destination Lab.

ROLES: Materials Technician

NAVIGATION:

Construction > Contract Progress >

1. Type the name of the desired contract in the search field and click the **Contract** hyperlink.
2. On the Contract Progress Summary page, click the **Daily Work Reports** tab on the left.
3. Find the desired DWR, using the search field at the top of the page if necessary, and click on the link in its **Sequence** field.
4. On the Contract Daily Work Report Summary page, click the **Acceptance Records** tab on the left.
5. Each row includes all the acceptance records associated with one Contract Project Item Material Set. Click the arrow on the left to expand the desired acceptance record.
6. On the acceptance record, use the dropdowns and autocomplete field to record the **Sample Type**, **Source ID**, and **Acceptance Method**. The values you enter will be copied to the sample record you create.
7. Click **Save** in the upper right corner.
8. On the same acceptance record, click the blue arrow on the right to open the **Row Actions** menu, and click on the link for **Create New Sample Record**.
9. On the Create New Sample Record page, enter the sampler's name into the **Sampler ID - Name** field. Alternatively, enter something in that field and delete it again, so that the Save button becomes active.
10. Click **Save** in the upper right corner.

Associating to a Destination Lab

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

Associating to a Mix Design

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

Adding Tests

19. Select the **Tests** tab on the left.
20. Click the **Assign Tests** button to launch the guided test assignment process.
21. 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.
22. 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.