

Sample Records - Workflow

BACKGROUND: After a sample record has been associated to a lab and had tests attached to it, it progresses through a series of queues on the way to its eventual authorization. You can track its progress by observing the Sample Status, as well as the Test Status of attached tests. Sample and test queues are managed through worksheets which, for roles with appropriate access, are found in the Materials Worksheets component on the Dashboard. Most of the worksheets are also accessible from quick links at the tops of the other worksheets, making navigation between them more convenient.

ROLES: Materials Technician, Materials Lab Technician, Materials Lab Supervisor, Materials Engineer, Construction Project Engineer, Materials Rover, Materials Review and Approve

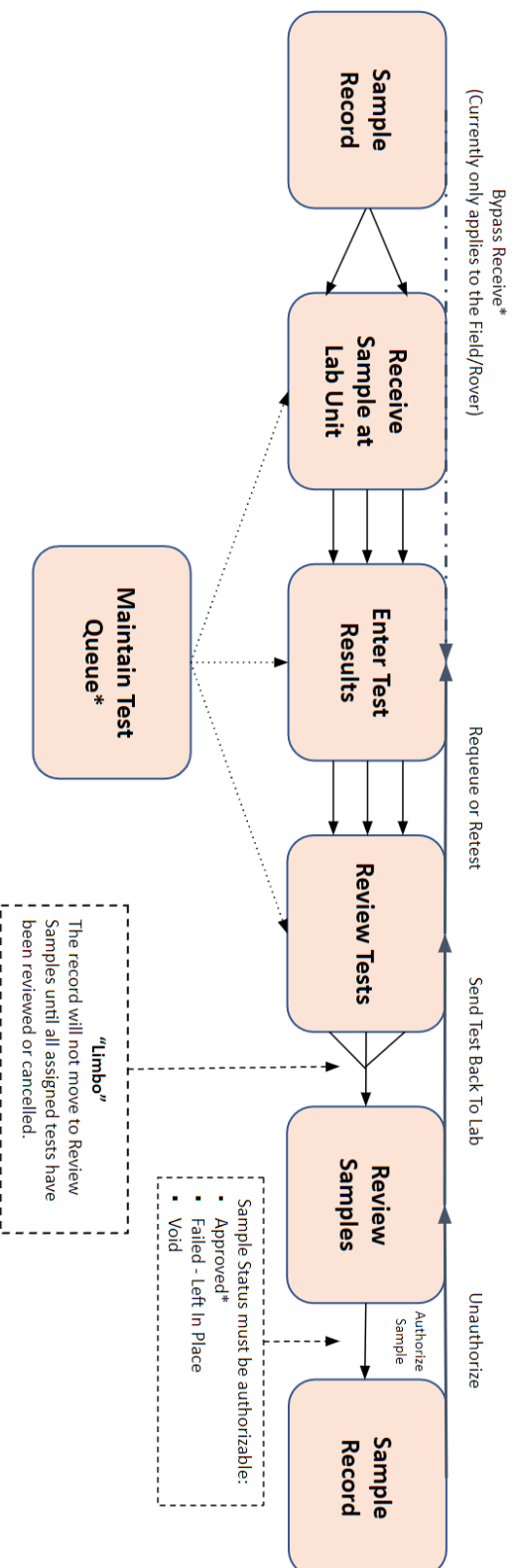
NAVIGATION:

Materials > Sample Records >

1. On the Sample Record Overview page, use the search and filter fields at the top of the page to find the desired sample record and click on its **Sample ID** link to open it.
2. On the Sample Record Summary page, check on the **Associations** tab that the correct lab has been added, and on the **Tests** tab that the correct tests have been added. (For more information, see the *Sample Records - Creating a Sample Record from the Dashboard* QRG or the *Sample Records - Creating a Sample Record from a DWR* QRG.)
3. Before test results can be entered, the sample must be received at the associated lab unit. Click the **Receive at Lab Unit** quick link at the top of the page. See the *Sample Records - Receiving at Lab Unit* QRG.
4. Once a test has achieved a status of "10 – Test in Queue," results can be entered on its associated agency view. See the *Sample Records - Entering Test Results* QRG.
5. Once a test has been marked complete and has a status of "40 – Test Complete," it must be reviewed twice. Alternatively, a test can be requeued, or retests can be requested. See the *Sample Records - Reviewing Tests* QRG.
6. Several other actions can be taken from the **Maintain Test Queue**, which can be accessed from quick links on the other worksheet pages, as well as from the Dashboard. In the Maintain Test Queue, you can manually change test statuses, split sample records, and reassign tests from one lab unit to another. See the *Sample Records - Splitting a Sample Record for Assurance* QRG and the *Sample Records - Changing a Test's Lab Unit* QRG.
7. After all tests on a sample have been reviewed twice and have a status of "60 – Test Approved by Level 2," the sample can be reviewed and authorized. Alternatively, one or more tests on a sample can be sent back to the lab for further work. See the *Sample Records - Reviewing Samples* QRG.

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Sample and Testing Workflow for DOT&PF



This workflow depicts one sample record with three assigned tests.

*Sample Records must be Authorized and have an Approved Status to count toward Material Acceptance