Sample Information Window

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Maintain Sample Information Window Description

The Maintain Sample Information window is used to track the collection of samples and test data results for both contract and non-contract specific materials.

Procedure

The person taking the sample (i.e. Sampler) is responsible for ensuring the sample is correctly entered in SiteManager. Once the sample has been received at the appropriate lab unit for testing, the tester is responsible for ensuring all test data in the required material templates are correctly entered in SiteManager. Once all tests are complete, the District or Central Office Materials reviews the test results. The product group assigns the sample the appropriate status, and authorizes the sample.

BASIC SAMPLE DATA FOLDER TAB

Basic Sample Data Folder Tab Description

Procedure

The sampler is responsible for ensuring the necessary fields as documented in the policy and procedures in the Basic Sample Data folder tab are entered correctly.

Field Table

Field Name	KYTC Population Policy & Procedure

Field Name	KYTC Population Policy & Procedure
Sample ID	Identifier of the sample record. The Sample ID is manually entered by the Sampler when logging the sample in SiteManager. The Sample ID is 14 characters in most circumstances but may be up to 18 characters long if there are special circumstances in the case of a revised sample or a recheck. Every character of the Sample ID has a specific meaning (i.e. it is "smart" number) and should follow the naming convention of *DDSSSIIIYY####XXXX*. The definition of each character is outlined below. - (DD) The district number of where the sample was taken. - (SSS) The section number of the Sampler. - (III) The 3 letter initials of the Sampler. (Note: Users with only a first and last name should use "X" as their middle initial. Users with more then three names should choose which 3 letters they want to use, but should use the same 3 letters consistently when logging samples). - (YY) The 2-digit year sample was taken. - (####) A 4-digit sequential number that starts with 0001 for each Sampler and then increments sequentially for each sample logged thereafter (i.e. 0001, 0002, 0003, etc.) - (XXXX) The last four characters of the Sample ID should only be entered to indicate special circumstances. RV01 would be used to indicate a revised sample (e.g. RV01 Revised Sample 1st time, RV02 Revised Sample 2nd time). RK01 would be used to indicate a recheck sample (e.g. RK01 Recheck Sample 1st time, RK02 Recheck Sample 2nd time).
Status	Identifies the current status of this record. SiteManager automatically assigns sample status. Once all tests for the sample are completed, the product group will select the appropriate sample status before the sample is authorized. Notes: - Only PENDING, COMPLETE, INVALID and FAILED will count toward satisfying the sample requirements for a material. - Only COMPLETE, FAILED, INVALID, VOID SAMPLE, FAILED AND REMOVED FROM PROJECT are acceptable statuses for authorizing a sample - Now automatic..
Revised by	This field is auto populated on the *original* sample record with the User ID of the person who revised the sample record. Note: - This is only relevant when a sample record is revised. - This field is not populated on the *revised* sample record.

KENTUCKY TRANSPORTATION CABINET

Kentucky TRNS*PORT Information Series

SiteManager Materials Module

Field Name	KYTC Population Policy & Procedure
Revising	Used when the current sample has been authorized and a revision is being made on a sample record. This field is auto populated with the Sample ID of the original sample record for revised samples only. A sample should only be revised if the original material failed, and a new sample is taken for further testing, or to correct an error/issue on an authorized sample. <u>Note:</u> - If a revised sample record is being revised again, then this field will be populated with the 'revising' Sample ID; not the original Sample ID.
Sample Date	Enter the actual date the sample was physically taken. <u>Note:</u> - This field is automatically filled in by the system with today's date.
Link To	This field is populated by using the look-up function to link the current sample to another sample that already exists in SiteManager. Link samples for the following: - IAS samples should be linked to an Acceptance Sample - When additional testing needs to be performed for failing samples, the new sample should be linked to the failing sample - QC/QA samples will be linked to the Mix Design sample records - Other situations when applicable.
Link From	This field reflects the opposite relationship as the Linked To field by displaying the ID of the sample that contains this sample in its Linked To field. This field is only auto populated for samples that are linked to another sample in SiteManager.
Log Date	This field is automatically filled in by the system with today's date.
Sample Type	This field identifies the type of sample taken (e.g. Independent Assurance, Project Acceptance). Select the appropriate sample type from the pick-list.
Acceptance Method	This field identifies the method by which the sample is being accepted (e.g. Certification, Mix Design Approval). Select the appropriate acceptance method from the pick-list.
Material	Using the look-up function select the material being sampled and tested.
Sampler	Using the look-up function select the Sampler from the list. In the case where the Sampler is not qualified to sample the material or his qualification has not been updated, contact the DME in his office for further action. The ID of the Sampler selected will be displayed.
P/S	Using the look-up function select the approved P/S for the material being sampled. In the case where the P/S is not approved or the approval has expired, the sampler will contact the DME in his office for further action.
Type	Based on the P/S, this field is auto populated with the Producer/Supplier type code (e.g. CMT for Cement, AGGR for Aggregates – General).
City	Based on the P/S, this field is auto populated with the city where the producer/supplier is located according to the Address listed on the Approved List, Producer/Supplier window.

KENTUCKY TRANSPORTATION CABINET

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SiteManager Materials Module

Field Name	KYTC Population Policy & Procedure
Prod Nm	Using the look-up function, select the appropriate product name (brand of material) when available.
Mnfctr	Using the look-up function, select the appropriate Manufacturer (i.e. Producer/Supplier) when available. - For Aggregate materials from Redistribution Yards, the original source of the material should be selected in the Manufacturer field. <u>Note:</u> - If the Brand Name is required on the Material Detail window, then after the Product Name is populated the Manufacturer field is auto populated. - If the Brand Name is not required on the Material Detail window, then the Manufacturer field is a search field that only displays the Producer/Suppliers that are approved for that material.
Town	Population of this field is optional.
Geog Area	Using the pick-list, specify the district where the sample was taken.
Intd Use	Enter the intended use of the material.
Represented Quantity	Per KYTC policy, this field will not be used.
Represented Quantity Units	This field is auto populated with the English Unit of measure for the material sampled.
Auth By	This field is auto populated with the ID of the person who authorized the sample record.
Auth Date	This field is auto populated with the date the sample was authorized. <u>Note:</u> - The system will use the current date when the same is authorized.
Lock Type	The value for this field determines the access level for updating the sample record. This field will automatically default to the Office Level securities set up for the user. If a sampler from an *equivalent other office* will be updating the sample record, choose No Lock (e.g. Inspector from one Residency Crew is assigned to another Residency Crew and needs to update the sample record, choose No Lock). For *IAS samples*, select Limited Access until comparison sample is authorized. After comparison sample is authorized, select No Lock. - <u>Office Level One</u>: Central Office (If a sampler's office security is set to the Central Office level, they will be able to update all sample records) - <u>Office Level Two</u>: District (If a sampler's office security is set to the District level, they will be able to update sample records in the same District and all Resident Offices in that District) - <u>Office Level Three</u>: Resident (If a sampler's office security is set to the Resident level, they will be able to update sample records created from others in the same Resident Office)
Locked By	This field is auto populated with the ID of the person who locked the sample record.

Field Name	KYTC Population Policy & Procedure
Lock Date	This field is auto populated with the date and time the sample record was locked.
Lab Control Number	This field provides a means to link samples for review in LIMS. Optional.
Lab Reference Number	This field is a number defined by the lab unit to identify a sample. KYTC will not use this field.

ADDTL SAMPLE DATA FOLDER TAB

Addtl Sample Data Folder Tab Description

Procedure

The Sampler is responsible for completing the necessary fields as documented in the policy and procedures in the Addtl Sample Data folder tab.

Field Table

Field Name	KYTC Population Policy & Procedure
Smpl ID	This field is auto populated with the Sample ID.
Buy American (check box)	This field identifies if the material sampled fulfills the requirement for the Buy USA program. Select the checkbox based on contract specifications; otherwise it should be left blank.
Buy American (drop-down list)	Per KYTC policy, this field will not be used.
Chemistry Lot Num	To be used by the Chemistry Section only for recording lot numbers.
Witnessed By	Population of this field is optional, except when KYTC witnesses IAS, Liquid Asphalt, and QC samples.
Smpl Size	Population of this field is optional. The Sampler may populate this field to indicate the sample size particularly for a sample that has more than one unit (e.g. 2 cans).
Smpl Size - Units	If the Sample Size field is populated, populate the sample unit.
Dist from Grade	Per KYTC policy, this field will not be used. This information will be captured in Material Test Templates.
Dist from Grade – Length	Per KYTC policy, this field will not be used. This information will be captured in Material Test Templates.

KENTUCKY TRANSPORTATION CABINET

Kentucky TRNS*PORT Information Series

SiteManager Materials Module

Field Name	KYTC Population Policy & Procedure
Station	Population of this field is required for concrete cylinders, soils, aggregate base, and cores.
Offset	Population of this field is required for the following: - Concrete pavement cylinders and Aggregate base: indicate left or right of centerline (e.g. Left) - Soils and Cores: distance left or right from centerline (e.g. 7' Left)
Reference	The location referenced on the plans where the sample was taken. The population of this field is optional.
Smpld From	Population of this field is required for concrete cylinders structure location and other locations as needed.
Smpl Origin	The population of this field is optional. May enter a description of where the sample originated.
Control Type	This field should be populated with the Control Type (e.g. Batch Number, Heat Number, Lot Number) for Reinforcement Steel, Liquid Asphalt, Paint, Cement, Latex, Herbicide, Pipe, and when applicable based on the Field Sampling & Testing Manual.
Cntrl Number	This field should be populated when a Control Type is selected in the previous field.
Seal Number	This field is populated with the roll number for Geotextiles and when applicable based on the Field Sampling & Testing Manual.
Design Type	Using the pick-list, this field should be populated when a mix design is being sampled.
Mix ID	Per KYTC policy, this field will not be used.
Plant ID	Per KYTC policy, this field will not be used.
Plant Name	Per KYTC policy, this field will not be used.
Plant Type	This field is auto populated with the type of plant (e.g. Aggregate, Concrete Pipe).
Creator User ID	This field is auto populated with the ID of the person who created the sample record.
Include Standard Remarks	Population of this field indicates that standard remarks should be included on the Lab Report. This checkbox should always be populated for Project Acceptance and QC samples.
Last Modified User ID	This field is auto populated with the ID of the person who last modified the sample record.
Last Modified Date	This field is auto populated with the date when the last modification was made to the sample record.
Sample Created From DWR	Indicates sample was created from a Daily Work Report.
DWR Date	Date of the Daily Work Report

Field Name	KYTC Population Policy & Procedure
DWR Inspector	Inspector who recorded the Daily Work Report.

CONTRACT FOLDER TAB

Contract Folder Tab Description

The Contract (Sample) Data window is used to associate a sample to a particular contract by project (or contracts). When an association is made between a sample and a contract, it is done at the line item level. That is, sample is kept on the line item within project within contract. Other than the associations, the only entry allowed is a represented quantity to be associated with the contract.

Procedure

The sampler is responsible for associating the contract item(s) in the Contract folder tab for Project Acceptance samples only. The sampler may opt to populate the Represented Qty field but it is not required.

Field Table

Field Name	KYTC Population Policy & Procedure
Contract ID	Using the search function, make the necessary contract item associations for Project Acceptance samples. The Contract ID will be displayed based upon the record selected.
Project	This field is auto populated with the Project Number based on the record selected.
Line Item	This field is auto populated with the Line Item based on the record selected.
Item Code	This field is auto populated with the Item Code based on the record selected.
Fed State Prj Nbr	This field is auto populated with the Federal/State number based on the record selected.
Cont Est Matrl Qty	This field is auto populated with the Contract Estimated Material Quantity based on the record selected. This is the material quantity expected to be placed over the life of the contract based on the current bid item quantity to conversion factor relationship identified in the contract sampling and testing requirements.
Represented Qty	Population of this field is optional.
Material Unit	This field is auto populated with the Material Unit based on the record selected.

Field Name	KYTC Population Policy & Procedure
Reported Matrl Qty	This field is auto populated with the Reported Material quantity based on the record selected. This total material installed. Calculated: Installed Quantity of Contract Item x Conversion Factor.
Satisfy Rep Matrl Qty	This field is auto populated with the Satisfy Reported Material Quantity (total material quantity reported on the Contract tab of the Maintain Sample Window) based on the record selected. In standalone mode, this data only includes those samples logged on the current local database, and therefore may not be representative of the entire item.
Line Item Desc	This field is auto populated with the Line Item Description based on the record selected.
Supplemental Description 1	This field is auto populated with the Supplemental Description based on the record selected.
Supplemental Description 2	This field is auto populated with the Supplemental Description 2 based on the record selected.
Contract Description	This field is auto populated with the Contact Description based on record selected.

OTHER FOLDER TAB

Other Folder Tab Description

The Other (Sample) folder tab allows the assignment of the current sample to entities other than contracts. Examples of entities other than contracts that may be specified are purchase order requisitions for maintenance, research, design, or geo-technical.

Procedure

For Non-Construction types of contracts, the Sampler will indicate what type of contract the test is being performed for on the Other tab.

To use LIMS, a user must assign a destination lab on the Other tab. A sample can be assigned to more than one destination lab.

Field Table

Field Name	KYTC Population Policy & Procedure
Type	For Non-Construction types of contracts, select the type of non-construction contract.
ID	Enter a space.
Destination Lab	Select the appropriate destination where the sample will be tested.

TESTS FOLDER TAB

Tests Folder Tab Description

This tab allows the user to identify the tests to be performed on the sample and to enter the results of the tests. The user can identify tests that have been defined for the material. It also allows the user to track when the test starts and is completed. A test method may be performed on a material more than once since a unique Sample Test Number must be assigned to each test.

Procedure

The Test folder tab will not be used to identify tests to be performed All tests will be assigned using the Assign Test button. All tests will be assigned using the Assign Test button. All testing and review of tests and samples will be handled in LIMS. After tests have been assigned through LIMS, the test folder tab will be available to view tests and test results.

Field Table

Field Name	KYTC Population Policy & Procedure
Test Method	Using the search function, the *Sampler* is responsible for selecting the tests that should be performed on the sampled material. The Sampling Checklist should be used as a guideline for determining what tests to select.
Lab ID	Using the search function, specify the lab that will perform the test. Note: - If the test location is unknown, assign to the District Lab.
Sample Test Nbr	Populate the Sample Test Nbr field with the number "1" for the first incident of that particular test method. Any subsequent incidents of the _same_ test method for the sample should be numbered sequentially (2, 3, etc.). Example: Three of the same tests (AG%SHALE) were performed to verify a failing test result on the same sample. One AG%CRUSHED test was performed on the same sample. One AGCRSQUAL test was performed on the same sample. - Test Method: AG%SHALE Sample Test Nbr: 1 - Test Method: AG%SHALE Sample Test Nbr: 2 - Test Method: AG%SHALE Sample Test Nbr: 3 - Test Method: AG%CRUSHED Sample Test Nbr: 1 - Test Method: AGCRSQUAL Sample Test Nbr: 1
Received Date	The *Tester* should populate this field with the actual date the sample arrived at the lab (i.e. receiving date). Note: - The system defaults to the current date.
Charge Amount	This field is auto populated. Per KYTC policy, this field will not be used.

Field Name	KYTC Population Policy & Procedure
Actual Start Date	The *Tester* should populate this field with the **Actual Start** date of the test. The one exception to this policy is for cylinder samples, which required the *Sampler* to populate this field with the estimated break date for the cylinder.
Actual Completion Date	The *Tester* should populate this field with the actual date the test was completed. This field is required in order to authorize the sample record.

Services /Toolbar Menu

Service Option	KYTC Policy & Procedure
Remarks	Opens the remarks balloon for free-form data entry. - Available from the Basic Sample Data, Addtl Sample Data, Contract, and Other tabs. Status: The Sampler and Tester will fill in the remarks as needed and applicable to the sample. Sample Responsibility: If CONSULTANT or OTHER AGENCY is chosen, User will log comment in the remarks bubble of the Sample Information window regarding specific type of consultant that took the sample. Test Responsibility: If CONSULTANT is chosen, User will log comment in the remarks bubble of the Sample Information window regarding specific type of consultant that took the sample.
Attachments	Per KYTC, this option will not be used.
Authorize	Authorizes the sample. - Available from the Basic Sample Data and Addtl Sample Data tabs. The DME and the Lab Supervisors will run a custom report that will indicate who will authorize the sample, and then the DME or the Lab Supervisor will authorize the sample.
Revise	Provides means to revise an existing sample. - Available from the Basic Sample Data after a sample has been authorized. - A revised sample will be created to correct errors, or for recheck samples.
Lab Report	Provides a report of the sample information. - Available from the Basic Sample Data and Addtl Sample Data tabs. Use as needed.
Testers	Provides a look-up of testers that are qualified for the selected test method. - Available from the Tests tab when a test has been added to the Tests tab. Select the tester who performed the test. If you edit the test results your name will automatically be added to the Tester List. NOTE: If the tester is not qualified to perform the test, their name will not be available from the Tester Search Window and will not be able to enter test data.

Service Option	KYTC Policy & Procedure
Enter/View Test Data	Opens the material test template associated with the selected test method. - Available from the Tests tab when a test has been added to the Tests tab. - Unqualified users will not be able to enter test data for controlled materials (e.g. concrete plastic test, aggregate % shale). Use as needed.
Related Sample Tests	Provides details about the tests performed on the original sample. - Available from the Tests tab for a Revised Sample. Use as needed for viewing revised or recheck samples.
Copy Sample	Provides the ability to copy an existing sample record. - Available from the Basic Sample Data tab. Use as needed.
Disposition Remarks	Provides the ability to add disposition remarks to a sample. This is the only field that can be changed *after a sample is authorized*. Disposition remarks print out on the lab report. - Available from the Basic Sample Data and Addtl Sample Data tab for an Authorized Sample. The Disposition Remarks needs to be filled out as to why a revised or recheck sample is going to be created. If any other remarks need to be documented on an authorized sample, they could be filled out as applicable. - On <u>FAILED</u> samples, in detail enter the Actions Taken indicating resolution. - On <u>FAILED AND REMOVED FROM PROJECT</u> samples, in detail enter why it failed and was removed.
Print Label	The Print Label button allows a user to print a custom designed label containing information about the sample. Mulitple copies can be printed at one time.

Assign Tests

Assign Tests Description

To assign tests, complete all required fields for the sample record. Then, on the Other panel, assign a destination lab. Finally, on the toolbar, click the Open Assign Tests button.

To accept default tests or assign additional tests, use the Assign Sample Tests window. If you are not ready to assign tests, click the Cancel button.

The system administrator has pre-determined the default tests for materials, because you commonly perform these tests on these materials. If you desire another test for a material, you must click the More button to add additional tests. Once you save tests, you cannot

reassign them from the Maintain Sample Information window; SiteManager makes the Open Assign Tests button unavailable.

If you click the More button, SiteManager expands the Assign Sample Tests window to reveal additional tests and the tests to be assigned.

The Additional Available Tests pane shows tests that you can assign for that material, but these have not been assigned as default tests.

Procedure

If uncertain of the Default tests, use the More button. Be careful of removing or adding tests. When you click the Save Tests button SiteManager closes the Assign Sample Tests window, displays the **Basic Sample Data** panel, locks the sample to prevent modifications, and changes the status from Pending to Logged.

If a mistake is made, tests can be added or canceled in LIMS on the Maintain Test window.

Field Table

Field Name	KYTC Population Policy & Procedure
Sample ID	Automatically populated by the system with the value that appears on the Basic Sample Data panel.
Sample Type	Identifies the purpose of the sample.
Material Code	KYTC-specific code that identifies the material.
Accept Default Tests	Click this button to accept default tests automatically associated by selecting the material.
Cancel	Click this button to close the Assign Sample Tests window.
More	Click this button to expand the Assign Sample Tests window to view panes with available tests and the tests to be assigned.