Sample Records and Testing

Role(s):

SysWide (Admin)	KYTC_Construction Admin
KYTC_Central Office Construction (View Only)	KYTC_Final Estimate Section
KYTC_Section Office Supervisor	KYTC_Section Office Manager
KYTC_District Construction Office Manager	KYTC_FHWA (View Only)
KYTC_Inspector	KYTC_Construction Read-Only User
KYTC_Auditor	KYTC_Materials Read-Only User (View Only)
KYTC_Materials Central Office User	KYTC_Materials Central Office Manager
KYTC_ Materials District Office User	KYTC_Materials District Office Manager
KYTC_Materials Admin	KYTC_District PD&PTEBM (View Only)

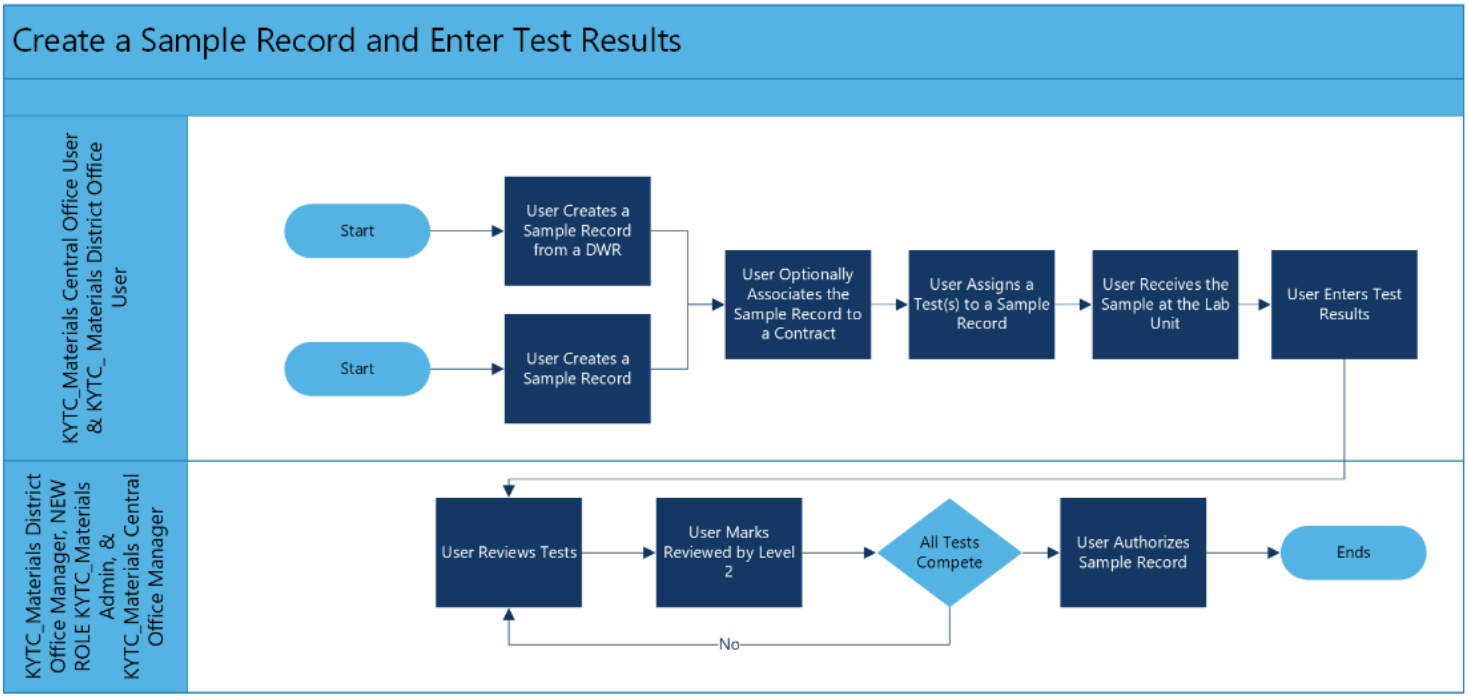
Background:



- Creating Sample Records and Entering Testing Results is the central function for the Materials portion of AWP Construction and Materials.
- This feature covers the process users will follow for creating sample records, adding acceptance records on Daily Work Reports, modifying Contract Acceptance Actions, and Entering Test Results.
- Each topic below lists the roles able to perform that action. Roles not listed may still have View Only access. The Role(s) table provides a full list of roles associated with this guide, including those limited to View Only access across all topics.
- The Custom Processes developed by Infotech for KYTC to import MEDL, Tinius Olsen, and XRay sample records and/or test results are covered under the Import Materials Files Feature.

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- Below is a high-level overview of the Create a Sample Record and Enter Test Results Process



Creating a Sample Record

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Section Office Supervisor, KYTC_Section Office Manager, KYTC_Inspector, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_ Materials District Office User, KYTC_Materials District Office Manager, and KYTC_Materials Admin

Navigation: AASHTOWare Project Dashboard

1. From the Materials component, click the **Sample Records** link.
2. On the Sample Record Overview, click the component **Actions** menu.
3. Click the **Add** action.
4. In the **Sample ID** field, enter a unique sample ID.
   - **Note:** The **Sample ID** will be formatted as District Number + Section Number + Initials + YY + 6-digit sequential number starting with 00000.

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5. In the **Material Code – Name** field, enter the material associated with the sample record.
6. In the **Sample Date** field, enter the sample date.
   - **Note:** The **Sample Date** can be past or future date which will impact which sources can be selected on the given sample record.
7. In the **Sample Type** drop-down menu, select the sample type.
8. In the **Acceptance Method** drop-down menu, select the acceptance method.
9. In the **Seal Number** field, enter the seal number.
10. Click the **Save** button.
11. From the Sample Record Summary, click on the **Additional Information** tab.
12. In the **Sampler ID – Name** field, enter the sampler user ID or name.
13. Click the **Save** button.
14. Click on the **Sources** tab.
15. Click the **Select Primary Source** button.
16. In the **Quick Find** search box, search for the primary source to add.
17. Click the **Add to Sample Record** button.
18. Click the **Save** button.
19. Click on the **Associations** tab.
20. Click the **New** button.
21. In the **Association Type** drop-down menu, select the Destination Lab value.
22. In the **Association Value** field, enter the lab ID.
    - **Note:** For all labs except Central office labs (begins with 006), to look up the correct lab, check the **Select Test Method Data** tab for your sample. Replace the 'LU' with 'DL' or just use the numbers in the lab ID to search. For any labs that start with LU006, the destination lab will be: DL00640.
23. Click the **Save** button.
    - **Note:** The Sample Record Status should be 'Pending'.

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Sample Records and Testing

Associating a Sample Record to a Contract

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- **Note:** Contracts will only be available to select if they have an item that uses the material chosen for the sample, and if the user has contract authority for them. If contracts do not show, you may need to add a change order for a contract to add the material or check the user's contract authority. (See the Select Test Method Data tab to find the refitems that are associated with the IMP Generic material that is associated with ALL tests)

Navigation: AASHTOWare Project Dashboard > Sample Records > Sample ID > Sample Record Summary

1. From the Sample Record Summary, click the **Contract** tab.
2. Click the **Select Contract Project Items** button.
3. In the **Quick Find** search box, search for contract project items to indicate which contract the sample is for.
4. Click the **Save** button.

Assigning Tests to a Sample Record

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Section Office Supervisor, KYTC_Inspector, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_ Materials District Office User, KYTC_Materials District Office Manager, and KYTC_Materials Admin,
- **Note:** A user will typically only have one lab assigned to them so they would not see all test options when assigning tests to a sample record (this is specifically for Central Office labs). If the user is assigned to more than one lab, then they may see multiple labs for tests when picking a central office (DL00640) as the Destination Lab. Only pick the tests related to a single lab.

Navigation: AASHTOWare Project Dashboard > Sample Records > Sample ID > Sample Record Summary

1. From the Sample Record Summary, click the **Tests** tab.

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2. Click the **Assign Tests** button.
   - **Note:** The types of tests that can be assigned are Default, Required, and Optional. Depending on which test method data was selected the test may or may not be required for the specific scenario.
3. On the Assign Sample Record Test page, review the **Required Test** section, then click the **Next** arrow.
4. On the **Select Default Test** section, click the **quick find** search box, search for a default test method to add to the sample, then click the **Next** arrow
5. On the **Select Optional Test** section, click the **quick find** search box, search for an optional test method to add to the sample, then click the **Next** arrow
6. On the **Add Test Runs and Confirm** section, click the **Confirm** button.
   - **Note:** The number of test runs can be modified to the number of tests runs to perform.
   - **Note:** The **Sample Record Status** should be Logged.

Receiving Samples at Lab Unit

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Section Office Supervisor, KYTC_Inspector, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_Materials District Office User, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** To receive a sample at the lab unit, the sample record must exist and not be authorized.

Navigation: AASHTOWare Project Dashboard

1. From the Materials Worksheet component, click the **Receive Sample at Lab Unit** link.
2. In the **Receive at Lab Unit** search box, search for the lab unit to receive the sample.
3. In the **Lab Unit** search box, search for the lab unit.
   - **Note:** The **Lab Unit** search box over the sample grid can be confused for the **Receive at Lab Unit** search box, which is at the top of the screen. This search box is only used to search for lab units in the grid below.
   - **Note:** Use the 'LU' version of the lab unit or just the numbers to search.

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- **Note:** To narrow the grid results, search by **Sample ID** and/or **Lab Unit.**

4. Click the **check box** at the beginning of **Sample ID** row to receive.
5. Click the **Mark as Received** button.
   - **Note:** If the sample is successfully received, the screen will prompt 'Save Complete' message.
   - **Note:** The **Sample Status** will be Received at Lab Unit.

Entering Test Results

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Section Office Supervisor, KYTC Section Office Manager (Conditional), KYTC_Inspector, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_ Materials District Office User, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** To enter test results, the **Test Status** must be Test in Queue and the **Sample Status** will be Received at Lab Unit.
- **Note:** The KYTC Section Office Manager role can enter and save results but not mark the test complete.

Navigation: AASHTOWare Project Dashboard

1. From the Materials Worksheet component, click the **Enter Test Results** link.
2. From the **Tests** section, in the **Quick Find** search box, search for the **Sample ID** or **Lab Unit**.
   - **Note:** Advanced filters can also be used.
3. Click the **check box** at the beginning of **Sample ID** row.
   - **Note:** The **Select Test Method Data Spreadsheet** will contain the description of the test method since this screen does not show the test method name. Example, GTNUCDENS is the name, and Moisture–Nuclear Density is the description.
4. Click the row **Actions** menu for the **Sample ID** to enter test results.
5. Click the **Views** section.
6. Select the name of the Test Method to enter the Test Results.

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- **Note:** A **Tester ID** and **Test Specification** can be selected. Test Specification Check is not required but is used to determine if the sample passes or fails. Options are: ISPC – In Spec, OSPC – Out of Spec, NSPC – No Spec, Pass, Fail

7. Enter any pertinent or required fields for the test on the Agency View.
8. Click the **Save** button.
   - **Note:** If the test failed, a yellow warning message will appear on the screen.
9. Click the **Previous** button to return to the **Enter Test Results** page.
10. From the **Tests** section, in the **quick find** search box, search for the **Sample ID** or **Lab Unit**.
11. Click the **check box** at the beginning of the **Sample ID** row.
12. Click the **Mark Test Complete** button.
    - **Note:** The **Sample Status** will be In Testing.

Reviewing Tests

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Section Office Supervisor, KYTC_Inspector, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin

Navigation: AASHTOWare Project Dashboard > Review Tests

- **Note:** If on the Enter Test Results Overview or Sample Record Summary, you can review tests by clicking on the **Review Tests** quick link.

1. In the **Quick Find** search box, search for the **Sample ID** with the test to review.
2. Click the check box at the beginning of the **Sample ID** and test row to review.
3. Click the **Mark Tests Review By Level 2** button.

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Sample Records and Testing

Authorizing Samples

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Section Office Supervisor, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** All tests must be complete and reviewed by level 2 to authorize the sample.
- **Note:** The **Sample Status** must be in Pending Authorization.

Navigation: AASHTOWare Project Dashboard > Review Samples

1. In the **Quick Find** search box, search for **Sample ID** to authorize.
2. Double-click the **Sample Status** value to open the drop-down menu, then select Complete.
3. Click the **Save** button.
   - **Note:** The **Sample Status** is updated to Complete from Pending Authorization.
4. Click the **check box** at the beginning of the **Sample ID** row.
5. Click the **Authorize Sample** button.
   - **Note:** The sample status will still be Complete and the system will add an Authorized By and Authorized Date field to the sample record with the your name and a date for when the sample record was authorized.

Requeuing Tests

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Inspector, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** To requeue a test, the test must have been marked Complete and the **Sample Status** should be In Testing.

Navigation: AASHTOWare Project Dashboard > Review Tests

1. In the **Quick Find** search box, search for the **Sample ID** with test.
2. Click the **check box** at the beginning of the **Sample ID** and test row.

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3. Click the **Requeue Test** button.
   - **Note:** The previous test results are saved but can be overridden.
4. Click the **Enter Test Results** quick link.
5. See the **Enter Test Results** exercise for the next steps.

Requesting Retests

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Inspector, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin

Navigation: AASHTOWare Project Dashboard > Materials Worksheet > Review Tests

1. In the **Quick Find** search box, search for the **Sample ID** with test.
2. Click the **check box** at the beginning of the **Sample ID** and test row.
3. Click the **Request Retests** button.
   - **Note:** The system will create minor versions of the original test (i.e. 1.1 or 1.5)
4. See the **Enter Test Results** for next steps.

Revising Samples

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Section Office Supervisor, KYTC_Inspector, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** To revise a sample, the sample must be authorized.
- **Note:** The user can use an advanced filter to look for authorized date/by is not blank.

Navigation: AASHTOWare Project Dashboard > Sample Record > Sample ID

1. On the Sample Record Summary, click the component **Actions** menu.
2. Click the **Revise** task.
3. In the **Sample ID** field, enter a new revising sample ID.

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- **Note:** The business usually adds RV01, RV02, etc. at the end of the sample ID. It would be easiest to use the same sample ID as the one being revised and add the RV01 to the end.

4. Click the **Save** button.

- **Note:** The system will create a sample record with most of the original sample record copied. See list below for what is and is not copied.
  - New field values on the revised sample:
    - **Sample ID** is entered
    - **Sample Status** is set to Pending
    - The new sample gets the revising sample ID populated (original sample ID) and the original sample ID in the **Link From** field.
    - The original sample gets the revised by sample ID populated (new sample id) and the new sample ID in the 'Link To field'
    - The created by is modified to the current user as well as the created date, last updated by, and last updated date
  - Field values copied from the original sample record:
    - **Material Code**
    - **Sample Date**
    - **Sample type**
    - **Acceptance Method**
    - **Sampler ID**
    - **Primary Source**
    - **Association Type**
    - **Contract Project Item**

5. See the Creating a Sample Record exercise for the next steps.

- **Note:** The original sample record status will be Void.

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Unauthorizing Samples

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Section Office Supervisor, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** The sample record must be authorized to unauthorize a sample.

Navigation: AASHTOWare Project Dashboard > Sample Records> Sample ID

1. Click the component **Actions** menu.
2. Click the **Unauthorize** task.
   - **Note:** If a sample has been revised, it may not be unauthorized.
   - **Note:** The system will remove the authorized by and date fields automatically.
   - **Note:** The **Sample Status** will remain unchanged.

Creating a Sample Record from a DWR

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Section Office Supervisor, KYTC_Section Office Manager, KYTC_Inspector, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_ Materials District Office User, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** The DWR must be in Draft status.
- **Note:** The Item must be on a posting that has a quantity posted and location or station from filled out and saved.

Navigation: AASHTOWare Project Dashboard > Construction > Daily Work Reports > All Daily Work Report > DWR Date

1. From the Contract Daily Work Report Summary, click the **Acceptance Records** tab.
2. Expand the material row under each item row.
3. Click the material row **Actions** menu and select **Create New Sample Record** task.
   - **Note:** If there is already a completed acceptance action for the material, a user can click the **Copy** task from the material row **Actions** menu to open a new acceptance record.

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4. In the **Sample ID** field, enter a unique sample ID.
5. Click the **Save** button.
   - **Note:** The user must click out of the **Sample ID** field to enable the **Save** button.
   - **Note:** The system will create a sample record with the following fields: **Sample ID, Material Code, Sample Date. Sampler ID. Created By/Date, Last Updated By/Date, DWR Inspector,** and other contract related information.
6. See all other Sample Testing exercises to complete the sample record.

Adding an Acceptance Record that is not a Sample Record to a DWR

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Final Estimate Section, KYTC_Section Office Supervisor, KYTC_Section Office Manager, KYTC_District Construction Office Manager, KYTC_Inspector, KYTC_Materials Central Office User, KYTC_ Materials District Office User, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** The DWR must be in Draft status.
- **Note:** The Item must be on a posting that has a quantity posted and location or station from filled out and saved.

Navigation: AASHTOWare Project Dashboard > Construction > Daily Work Reports > DWR Date

1. From the Contract Daily Work Report Summary, click the **Acceptance Records** tab.
2. Expand the material row under each item row.
3. Enter any acceptance record information as necessary.
   - **Note:** To count for acceptance, the record must have a Field Inspection Value selected or a DWR agency view filled out.
   - **Note:** If there is already a completed acceptance action for the material, a user can click the **Copy** task from the material row **Actions** menu to open a new acceptance record.

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