



QUICK REFERENCE GUIDE:

Modifying a Sample Record

Background:

After a sample is created, it may need to be changed based on testing requirements. Below are common sample record changes.

The maintain test queue is not accessible by all roles, and the user must have access to the lab unit. However, many tweaks can be performed on the sample record itself before it is authorized.

Roles:

Most Construction & Material Roles

Change Destination Lab:

*Only CM Module Admin, Lab Supervisor, Material Rover, Material Lab Admin

Materials Worksheets > Maintain Test Queue >

1. On the Maintain Test Queue page, use the search to find the test(s) that need to go to a different lab unit.
2. Scroll right to find the Lab Unit column.
3. Click twice in the **Lab Unit** for that test. The field expands and becomes editable, delete the current value.
4. Hit enter in the autocomplete field and select the appropriate Lab Unit. Note: Repeat this for all tests on the Sample if appropriate.
5. Click **Save** in the upper right corner.
6. Click the **Sample ID** and click the Associations Tab and change or add the new Destination Lab.
7. Click **Save**.

Add or Remove a Test:

Sample Records > Sample ID

1. On the Sample Record Summary review the **Sample Status** to make sure it is not Approved. *If the sample is Approved, the sample is locked down and cannot be edited.*
2. Click the Tests Tab on the left
 - a. To add a Test:
 - i. Click **Assign Tests** button
 - ii. Use the next arrows to skip to **Select Optional Tests**
 - iii. Click the test(s) you want to assign and click the next arrow
 - iv. Review tests and click the **Confirm** button
 - b. Remove a Test:
 - i. Click the **Row Actions Menu** of the Test that you need to remove
 - ii. Under Actions click **Delete**
 - iii. Click **Save**.

Change a Material Source on a Sample:

You are unable to change the source after the sample is created. To correct the material source, a new sample will need to be created, and the old sample will need to be deleted. To have a sample deleted contact your CM Module Admin.

If you need further assistance please contact your Module Admin
Updated January 2024



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Adding Contracts to an Authorized Sample:

*Only CM Module Admins and Material Lab Admins can perform this task

Materials > Sample Records > Sample ID

1. Open the Component Actions Menu of the Sample Record and click **Unauthorize**.
2. Click the Contract tab and click **Select Contract Project Items...** button.
3. In the modal window, click the row of each Contract Project Item(s) that should be added and click **Save**.
4. Click the Component Actions Menu and Click **Authorize**.

Clearing Usage Data:

Materials > Sample Records > Sample ID

1. On the Sample Record Summary review the **Sample Status** to make sure it is not **Approved**. *If the sample is Approved, the sample is locked down and cannot be edited.*
2. Click the Tests Tab on the left.
3. Click the **Row Actions Menu** of the test you want to **Clear Usage Data**
 - a. Under **Views** open the **Agency View**
 - b. Click the **Component Actions Menu**
 - c. Under **Actions** click **Clear Usage Data**

Note: Clearing Usage Data erases both test and tester data and should only be done at the direction of a Rover or Module Admin. Ensure that test data is

recorded in a secondary location prior to clearing usage data, and that the same tester who initially entered the test data re-enters it.

If you need further assistance please contact your Module Admin
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