



QUICK REFERENCE GUIDE:

# Creating a Sample from the Dashboard

## Background:

You have collected a sample and it needs to be tested. Create a sample record in the system and link it to the Contract. If you are splitting your sample for an assurance, you'll want to link the samples together.

## Roles:

All Construction & Material Roles

## Navigation:

Materials > Sample Records >

1. On the Sample Record Overview page, open the **Component Actions** menu in the upper right corner and click **Add**.
2. On the General tab, fill out the following fields:
  - a. **Material Code – Name** is an autocomplete field, begin typing the sample's material and select it when it populates.
  - b. **Sample Date** – Select the day the sample was collected
  - c. **Sample Type** – Select type of sample
  - d. **Regional Lab Number** – This field will be populated by the Regional Lab only
  - e. **Field Number** – This is the samples field number (example: BXA-G-1)
3. On the Sources tab, click the **Select Primary Source** button.
4. In the Select Primary Source modal window, click in the row of the sample's source to select it, and click the **Add to Sample Record**

button. *Note: If you are unable to find the source you will need to contact your Lab Supervisor or Rover to add the source. You will be unable to create a sample until the source is created.*

5. Click **Save**.
6. Back on the **General** Tab fill out the **Sampler ID**.
  - a. If the sample is for HMA Calibration points - select the Contractor Sampler.
  - b. If the user is only Density Qualified they will not appear in the Sampler list, in this case select Density Sampling Only as your sampler.
7. Fill out any additional information in the **General** tab. (Example: stationing, sample units, grade reference, etc.).
8. On the **Mix Design Information** Tab, select the **Mix Design Type** and **Mix Design ID** (skip this step if you are not testing a material with a Mix Design)
9. On the **Lab Associations** Tab, click the **New** button.
10. In the **Association Type** dropdown, select Destination Lab.
11. In the **Association Value** autocomplete field, begin typing the name of the sample's Destination Lab or click enter to see all destination lab options. Select the appropriate Destination Lab.
12. Click **Save**.
13. On the **Contract** Tab, click the **Select Contract Project Items** button.

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14. The Select Contract Project Items modal window shows all project item material sets, click on the row(s) of the desired contract project item, and click the **Save** button at the bottom of the window.
15. Are you splitting your sample for an Assurance? If no, skip to the next step.
  - a. Click the arrow in the upper right to open the Component Actions menu and, in the Tasks section, click on **Split Sample Record...**
  - b. In the Split Sample Record modal window, enter the number of new sample records you would like to create, and click the Split Sample Record button. Each copy is assigned the Sample ID of the original sample record with a hyphen and a sequential number that identifies the split number. The split samples will have the original sample ID in the **Lab Control Number –linked ACPT/ASSR** field on the sample record.
  - c. To find the Split Sample Record(s), click the **Overview** quicklink at the top of the page.
  - d. Search for the **Sample ID** of the original sample.
  - e. Click the **Sample ID** link of the split sample, on the general tab change the **Sample Type**, **Field Number**, and **Stationing** information if necessary
  - f. On the **Lab Associations** tab, change the **Association Value** if necessary and click **Save**.
16. Both the original sample and the split sample record(s) need tests assigned.
17. On the **Tests** Tab, Click the **Assign Tests** button to launch the guided test assignment process.

*Note: A sample record cannot have tests assigned to it until it has been associated with a Destination Lab.*
18. Using the blue arrows in the bottom right for navigation, click the next button. No tests will appear in the required tests or select default. All available tests will appear in the **Select Optional Tests** screen. Click the appropriate tests for this sample and click next.
19. Review and click the **Confirm** button.

*Note: 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. If that does not fix the problem, reach out to your Global Materials Admin or Materials Lab Admin.*
20. On the Tests Tab fill out the following fields above the assigned tests.
  - a. **Ref Spec** – Enter either the Standard Specification (i.e. SSHC 2020), the Regional Modification, Special Provision, or Change Order (i.e. CR703.1-050122 for Central Region Selected Material)
  - b. **Ref Spec Condition** – Enter the Classification of the material being tested. Such as Type A of Type B for Selected Material.

*Note: If you do not know what your Ref Spec or Ref Spec Condition should be consult your contract materials or contact your Module Admins.*
21. Repeat steps 15 through 18 for all sample records created.

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22. *If you forgot to split your sample before adding tests, you can manually link the samples. To manually link the samples:*

- a. Copy the **Sample ID** of the ACPT sample record.
- b. Navigate to the ASSR sample record and paste the ACPT sample record Sample ID in the Lab **Control Number - linked ACPT/ASSR field**.
- c. Click **Save**.

### Next Steps:

*Sample Records – Receiving at Lab Unit (only applies to Regional and Consultant Labs)*

*Sample Records – Entering Test Results*

*Sample Records – Modify a Sample Record*