

## AASHTOWare Project Construction and Materials™ Quick Reference Guide for TDOT Managing Sample Records

### Background:

- A sample record contains information about a material that was sampled, tested, reviewed, or otherwise assessed.
- You cannot change the value in the **Material Code – Name** field after a test has been assigned to the sample record or after the sample record reaches *Logged* status or higher.
- No changes can be made to a sample record with a status of *Authorized* except adding or modifying disposition remarks.

### Adding a Sample Record:

When adding a new sample record, the system will generate a new sample ID.

**Navigation:** Materials > Sample Record

1. Click the **Home** drop-down arrow and verify the correct role is selected.
2. In the Materials component, click the **Sample Records** link.
3. Click the component **Actions** menu and select the **Add** action.
4. In the **Material Code – Name** field, search for and select the material code for the material.
  - **Note:** The Sample ID will populate when the record is saved.
5. In the **Lab Reference Number** field, enter the lab reference number used for the sample record, if appropriate.
6. In the **Sample Size** field, enter the size of the sample taken.
7. In the **Sample Size Units** field, click the drop-down arrow and select the unit of measure for the sample size.
8. In the **Represented Quantity** field, enter the quantity of material represented by the sample.
9. In the **Represented Quantity Units** field, search for and select the unit of measurement for the material sample quantity.
10. In the **Sample Date** field, enter the date the sample was taken.
11. In the **Sample Type** field, click the drop-down arrow and select the type of sample taken.
12. In the **Acceptance Method** field, click the drop-down arrow and select the acceptance method for the sample.

13. In the **Link To** field, search for and select a sample record to link this sample to, if appropriate.
14. In the **Remarks** section, in the **Type** field, click the drop-down arrow and select the remark type.
15. In the **Remarks** field, enter remarks for the sample (including the Batch Number, Heat Number, and Lot Numbers).
16. Click the **Save** button.

### Viewing or Modifying General Information on a Sample Record:

1. Navigate to the Sample Record Summary component for the appropriate sample record.
2. View and modify the information on the **General** tab as needed.

### Viewing or Modifying Sample Location Information on a Sample Record:

The **Sample Location** tab on the Sample Record Summary includes information about where the material sample was taken.

1. Click the **Sample Location** tab.
2. In the **Sampled From** field, indicate where the sample was taken, whether at a source or facility location or at a project location.
3. In the **Sample Origin** field, enter the originating location for the sample, if appropriate.
4. In the **Geographic Area** field, click the drop-down arrow and select the geographic location where the sample was taken.
5. In the **Latitude** field, enter the latitude of the sample location, if appropriate.
6. In the **Longitude** field enter the longitude of the sample location, if appropriate.
7. In the **Distance From Grade** field, enter the distance from finished grade measurement.
8. In the **Distance From Grade Units** field, click the drop-down arrow and select the unit of measurement for the distance from grade.
9. In the **Reference** field, enter a location used to describe another location by giving the relative position or benchmark, if appropriate.
10. In the **Station** field, enter the station where the sample was taken. This field indicates the first part of the station number.

11. In the **Station Plus** field, enter the station of where the sample was taken. This field indicates the second part of the station number.
12. In the **Offset Distance** field, enter the distance from the centerline to the location of where the sample was taken.
13. In the **Offset Direction** field, click the drop-down arrow and select the direction of where the sample was taken in reference to the centerline.
14. In the **Comments** field, enter comments for the sample location, if appropriate.
15. Click the **Save** button.

### Viewing or Modifying Additional Information on a Sample Record:

The **Additional Information** tab on the Sample Record Summary includes additional information about the sample record and the sample material.

The **Sampler ID** field is filtered to show only those persons who have a sampling qualification that matches the sampling qualification specified for the sampled material (or those who are marked as an Exempt Sampler).

1. Click the **Additional Information** tab.
2. In the **Sampler ID – Name** field, search for and select the person who took the sample.
3. In the **Witnessed By ID – Name** field, search for and select the person who witnessed the sample being taken.
4. In the **Requested By** field, enter the name of the person or office that requested the sample.
5. In the **Intended Use** field, enter a description of the intended use of the material.
6. In the **Cylinder Number** field, enter the A/B cylinder numbers with the acceptance strength in parenthesis.
7. In the **Mix Design Type** field, click the drop-down arrow and select the type of mix design.
8. In the **Mix Design ID** field, select the mix design.
9. Click the **Buy American** check box if the material was made in the United States of America, per the Buy American Act.
10. In the **Buy USA Requirements** field, click the drop-down arrow and select the type of documentation required to accept materials for the Buy American Act.

### Selecting Sources for a Sample Record:

1. Click the **Sources/Facilities** tab.
2. In the **Primary Source/Facility** section, click the **Select Primary Source** button.
3. Search for and select the primary source.
4. Click the **Add to Sample Record** button.
5. Click the **Save** button.

### Selecting Additional Sources for a Sample Record:

In the **Additional Sources** section, each row represents a non-primary source associated with the material sample.

1. In the **Additional Sources** section, click the **Select Sources** button.
2. Search for and select the additional source(s).
3. Click the **Add to Sample Record** button.
4. Click the **Save** button.

### Adding Associations for a Sample Record:

The **Associations** tab on the Sample Record Summary contains a list of entity values associated with the material sample. You can associate a sample record with one or more destination labs, inspection agencies, person identifications, and limited sample access roles.

When you create an association between a sample record and a destination lab, it determines which lab units can process the sample. Only lab units associated with the destination lab have access to the sample record.

You can also associate a sample record with a limited sample access role. When such an association is created, the system allows access to the sample record and its associated tests and agency views only for users whose active role is designated in the limited sample access association.

You cannot add or change associations for a sample record after tests are assigned to it.

1. Click the **Associations** tab.
2. Click the **New** button.
3. In the **Association Type** field, click the drop-down arrow and select the type of association for the sample record.
4. In the **Association Value** field, search for and select the value for the selected association type.
5. Click the **Save** button.

### Viewing or Modifying Contract Project Items for a Sample Record:

The **Contract** tab on a Sample Record Summary lists contract project items that consumed the material tested with this sample (contract project item material sets). This provides a record of the location and quantity of the sampled material used for items on various contracts.

1. Click the **Contract** tab.
2. Click the **Select Contract Project Items** button.
3. Search for and select the contract project item(s) to add to the sample record.
4. Click the **Save** button.
5. Expand the item row to view or modify the information.
6. Click the **Save** button.

### Assigning Default Tests to a Sample Record:

The **Tests** tab on the Sample Record Summary contains a list of all the tests assigned to the sample record and allows you to assign tests to a new sample record.

1. Click the **Tests** tab.
2. Click the list **Actions** menu and click the **Assign Default Tests** action.
3. Click the **Save** button.

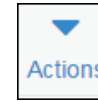
### Assigning Default Tests to a Sample Record:

1. Click the **Assign Tests** button.
2. In the **Review Required Tests** section, review any tests that are required to be performed for this sample.
3. Click the **Next** arrow in the lower right corner of the screen.
4. In the **Select Default Tests** section, search for and select any default tests to assign to the sample.
5. Click the **Next** arrow in the lower right corner of the screen.
6. In the **Select Optional Tests** section, search for and select any optional tests to assign to the sample.
7. Click the **Next** arrow in the lower right corner of the screen.
8. In the **Add Test Runs and Confirm** section, in the **Test Runs** field, enter the number of test runs to perform for each assigned test on the sample.
  - **Note:** Test runs will count towards your material.
9. Click the **Confirm** button.
10. View the information in the assigned sample record test row.
11. Click the **Save** button.
  - **Note:** To delete a test record row, click the row **Actions** menu and select **Delete**.
  - **Note:** To indicate whether the test counts toward the material acceptance actions, or the number of Test Instances that count toward the material acceptance actions from that specific sample record test, click the **Count Towards MAA** check box and enter the number of Test Instances.
  - **Note:** The **Test Instances** field is read-only by default. To enable editing you must change the field to a Text Box field within the Sample Record Summary Tests component.

### Next Steps:

After managing sample records, the next step is to Copy, Authorize, and Unauthorize Samples. Refer to TDOT Quick Reference Guides and CBTs for more information.

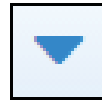
### Key to Actions Menus:



Global **Actions** menu  
(At the top of the screen)



Component **Actions** menu  
(On the heading)



Row **Actions** menu  
(On the row)