

## CREATING T2 SAMPLE

### BASIC SAMPLE DATA PANEL

1. On a new sample record, in the **Sample Date** field, type the date from the Date Sampled field on the paper T2.
2. On the **Smpl Type** select **Certification**. For the **Acpt Meth** also select **Certification**. If any other option is selected it will cause the sample to not complete or withhold payment
3. In the **Material** field, type **T2.< first three numbers that match the associated category of the item >**.

The format matches all other item codes, but is preceded by 'T2'. This is case-sensitive. Example: T2.716

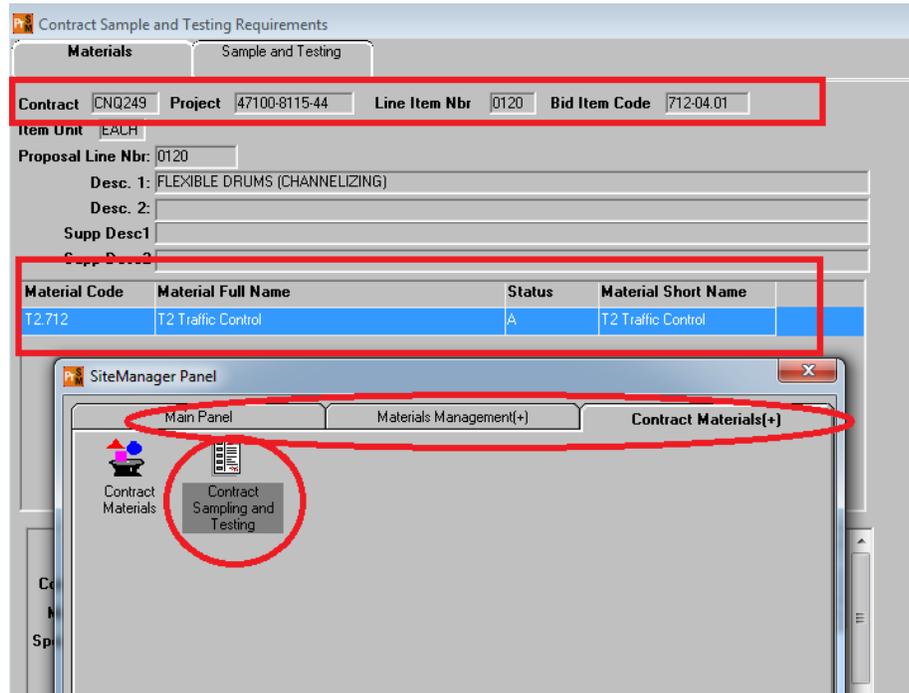
There are several exceptions created to handle items that require multiple T2's. We also have some to record T2's for materials that we wanted to more accurately identify. One example would be using T2.604.2 to more accurately identify the T2 as being for applied texture finish. Another would be item 604-03.04- pavement at bridge ends. It has T2.604 to be used for any and all incidental materials such as drain components, etc. **and** T2.604.3 to be used for expansion joint if not paid separately.

These exceptions include:

- **T2.502.1** - T2 Dowel and Tie Bars
- **T2.604.1** - T2 Curing Compound
- **T2.604.2** - T2 Applied Texture Finish
- **T2.604.3** - T2 Joint Seal Material
- **T2.604.4** - T2- Miscellaneous 604 Materials
- **T2.607.1** - T2 Corrugated Metal Pipe
- **T2.610.1** - T2 Pipe Drain Concrete
- **T2.610.2** - T2 Pipe Drain Metal
- **T2.610.3** - T2 Pipe Drain Plastic
- **T2.EPOXY** - T2 Epoxy Coated Steel Bar Reinforcement

- **T2.SBR** - T2 Steel Bar Reinforcement

If you are not sure what materials are tied to specific contract items you can run report RR005 or RR069 in BOE. Office staff also has read right to the “Contract Sampling and Testing” window of SiteManager (screen capture below) It lists the materials that are linked to specific contract items:



After entering T2 material code, press the **Tab** key on the keyboard. SiteManager populates the Material and Material Description fields and auto-selects Various from the Repr Qty Units dropdown list.

4. In the **Sampler** field, right-click and select the **Search** choice. SiteManager displays the Search Window window.

To sort the list, click the **Inspector Name** column heading.

In the **Inspector Name** column, scroll to and double-click the name of the person whose signature is shown on the paper T2 in the Accepted By field. SiteManager populates the Sampler field.

5. In the P/S field, select the actual P/S (if listed). This will mainly be used for concrete pipe, bridge paint, seeding, and other items that have only one P/S listed on the certifications. Use 9999999 – Multiple/Unlisted Mnfrs for T2’s with multiple material P/S’s (such as pavement marking and traffic control)

6. In the Mnfctr field, select the actual manufacturer (if listed).

If a manufacturer is not listed for the material, in the Mnfctr field, select **9999999 – Multiple/Unlisted Mnfctrs**

### **On the Contract panel**

Now, the FIELD - Operations Office Staff records the quantity for the item represented on the paper T2.

1. Click the **Contract** tab. SiteManager displays the **Contract** panel.
2. On the toolbar, click the **New** button. SiteManager displays the Select Contract/Material Information window.
3. In the **Contract ID** field, type the contract ID.
4. On the keyboard, press the **Tab** key. SiteManager displays the associated line items.
5. Double-click the desired line item. **NOTE:** *If there are multiple items listed on the T2 you can hold down the Ctrl key and select all applicable items, then click OK to add all items at once.*
6. In the **Represented Qty** field, type the quantity recorded for the item(s) on the paper T2 form.
7. **Save.**

### **On the Other panel**

Now, the FIELD - Operations Office Staff records the T2 Subcontractor (contractor/subcontractor who performs the work).

1. Click the **Other** panel. In the **Type** dropdown list, select **T2 Subcontractor**
8. In the **ID** field, right-click and select the **Search** choice. SiteManager displays the Search Window.
9. In the **Vendor Full Name** column, double-click the desired T2 subcontractor. SiteManager populates the ID field.
10. **Save.**

Now, the FIELD - Operations Office Staff assigns the destination lab.

11. On the toolbar, click the **New** button. SiteManager inserts a new row.

12. In the **Type** dropdown list, select **Destination Lab**.

*Note: Although a T2 does not require a test, SiteManager requires this step to use LIMS.*

13. In the **ID** field, right-click and select the **Search** choice. SiteManager displays the Search Window window.
14. In the **Destination Lab** column, double-click **DEST – TDOT T2 Certification**. SiteManager populates the ID field.
15. **Save**.

**Now, the FIELD - Operations Office Staff accepts the default tests to trigger the auto-finalization.**

1. On the toolbar, click the **Open Assign Tests** button. SiteManager displays the Assign Sample Tests window.

*Note: Although a T2 item does not require a test, SiteManager requires this step to use SiteManager LIMS.*

2. Click the **Accept Default Tests** button. [Template: M017] SiteManager closes the Assign Sample Tests window, changes the Maintain Sample Information window's sample status to Completed to authorize the sample, and makes all fields inquiry-only. [Customization: MTC028]  
NOTE: If the sample status is not "Complete" sample will not count toward S&T requirements. In this case go back thru the steps used to create the sample to verify no required info was missed.

## **FIELD - Operations Office Staff Sends the Paper T2 to Regional M&T Office**

Now, the FIELD - Operations Office Staff records the sample ID on the paper T2 and sends it to Regional M&T Office.

1. On the paper T2, in the **Report No.** field (or **SM Sample ID** field at bottom right of form), write the sample ID displayed in the Maintain Sample Information window's **Smpl ID** field.
2. FIELD - Operations Office Staff makes two copies of the original paper T2.
3. FIELD - Operations Office Staff stores one copy of the paper T2 in the contract file.
4. FIELD - Operations Office Staff sends the original and one copy of the paper T2 with certifications attached to REG - M&T Supervisor at Regional M&T Office.

## **REG - M&T Supervisor Reviews the Paper T2 and the Electronic T2 Record**

Now, the REG - M&T Supervisor receives the paper T2 and reviews/compares it with the electronic T2 record in SiteManager.

1. Receive and review the paper T2.
2. Review the associated electronic T2 record. Verify P/S and/or Manufacturer, along with quantities listed on the Contract tab match quantities listed on the paper T2.

## **REG - M&T Supervisor or FIELD - Operations Office Staff Unauthorizes an Electronic T2 Record and Makes Necessary Changes**

If the electronic T2 record must be unauthorized, either the REG - M&T Supervisor or FIELD - Operations Office Staff completes the following steps.

1. If the REG - M&T Supervisor wishes to unauthorize the electronic T2 record, the REG - M&T Supervisor calls to discuss the change with the FIELD - Operations Office Staff person who logged the electronic T2 record.  
- or -  
If the FIELD - Operations Office Staff wishes to unauthorize the electronic T2 record, the FIELD - Operations Office Staff calls to discuss the change with the REG - M&T Supervisor person who reviews the paper T2s.
2. REG - M&T Supervisor or FIELD - Operations Office Staff logs onto SiteManager and accesses the Maintain Sample Information window.
3. On the toolbar, click the **Open** button. SiteManager displays the Select Sample window.
4. To sort the column, click the **Sample ID** column heading.
5. In the **Sample ID** column, scroll to and double-click the desired sample ID. SiteManager displays the desired sample record.
6. On the **Services** menu, select the **Unauthorize** choice. SiteManager displays a message that prompts you to confirm your decision.
7. In the message, click the **Yes** button. SiteManager makes some of the fields editable again, removes the previously selected acceptance method, clears the Auth By and Auth Date fields, and changes the sample status to Pending Authorization.
8. **Save.**

9. REG - M&T Supervisor or FIELD - Operations Office Staff makes any other necessary changes to the sample record.
10. **Save.**
11. On the toolbar, click the **Remarks** button. The system displays the Remarks (General Remarks) window.
12. Type any necessary remarks.
13. To close the Remarks (General Remarks) window, on the toolbar, click the **Remarks** button again.
14. **Save.**

### **FIELD - Operations Office Staff in the T2 Certification Product Group Re-authorizes the Electronic T2 Record**

If the electronic T2 record had to be unauthorized, a member of the T2 - Certification product group must re-authorize the electronic T2 record.

1. FIELD - Operations Office Staff receives corrected T2 and/or certification.
2. On the Maintain Sample Information window, on the toolbar, click the **Open LIMS** button.
3. On the **LIMS** panel, double-click the **Review Samples** icon. SiteManager LIMS displays the Review Samples window.
4. In the first **Filter Criteria** dropdown list, select the **Sample ID** choice.
5. In the second **Filter Criteria** dropdown list, select the **Equals** choice.
6. In the **Filter Criteria** text field, type the desired sample ID.

**Note:** May be copied from the Maintain Sample Information window's Smpl ID field.

7. Click the **Apply** button. The upper pane displays the desired sample record.
8. Click the **View Compare Results** button.

**Note:** On the template, check the represented quantity recorded on the electronic T2 record.

9. On the toolbar, click the **Remarks** button. The system displays the Remarks (General Remarks) window.
10. Type any necessary remarks.

11. To close the Remarks (General Remarks) window, on the toolbar, click the **Remarks** button again.
12. In the **Authorize** column, select the check box.  
  
**Warning!** Do not select the **Approve Only** check box!
13. In the **Acceptance Method** dropdown list, select **Certification**.
14. In the **Sample Status** dropdown list, select **Completed** or another appropriate choice.
15. **Save**. SiteManager LIMS removes the sample record from Review Samples queue and makes the sample record inquiry-only.  
  
**Warning!** Verify that the **Send Test Back to Lab** check box has not been selected.
16. To clear the filter, in the **Filter Criteria** area, click the **Reset** button.
17. On the toolbar, click the **Exit SiteManager LIMS** button. SiteManager LIMS displays a message prompting you to confirm your decision.
18. In the message window, click the **Yes** button. The LIMS application window closes and the SiteManager application window is visible again.
19. On the toolbar, click the **Exit SiteManager** button.
20. FIELD - Operations Office Staff sends the corrected T2 and/or certifications to REG - M&T Supervisor.
21. REG - M&T Supervisor receives the corrected paper T2 and/or certifications and compares to the electronic T2 record.

### **REG - M&T Supervisor Archives Paper T2 in Contract File and Sends Original to Headquarters M&T**

1. REG - M&T Supervisor makes paper copies of T2 in case of an audit and stores the copies in the contract file.
2. REG - M&T Supervisor sends original paper T2 to Headquarters M&T.