Test Methods

Overview

Personnel with work groups of Samples and Lab Personnel can add/edit sample information in CAMMS. Users will associate the appropriate Material Code and Material Test Method(s) for the samples being added; upload any documents that need to be associated; key in remarks; key in test method data to execute test; generate test report(s); submit tests for review; then submit samples for sample status disposition and approval.

Sample Summary

Pre-requisite: Association of Test Method to Material Category and Test Method to Material Item must exist. This association is done at the Materials > Materials Code process.

The Sample Summary window displays a listing of samples that have been added that do not have tests associated with them. The Add link is available for user to add new samples. The PDF link is available for user to generate an unofficial report of the information from the Sample Summary window. After samples have been added, a Detail link will display on each row that allows the user to open the Sample Detail window and tab windows.

Basic Procedure
1. Open the CAMMS application and navigate to the *Test Methods Process*.
2. Click on any *Tests* subprocess link at the left navigation menu.
3. Click on the *Sample Summary* link at the top of the listing to open the Sample Summary window.

Notes:
- All samples added without test methods associated, included converted data, will display on the Sample Summary window.

Sample Summary > Sample Add

Lab personnel will be able to add new samples.

Basic Procedure
1. Navigate to the Sample Summary window.
2. Click *Add* in upper right-hand corner. Sample Add window will open.
3. Select the *Testing Lab*.
4. Select the *Sample Type*.
5. Select the *Contract ID*. User will need to start typing the Contract ID and when it appears on the picklist, highlight it to select it. The sample type will control if this field is required.
6. Select the *CAMMS Project*. The sample type will control if this field is required.
7. Select the *CPMS Proj No*. The sample type will control if this field is required.

8. Enter the *Sample Card No*.
9. Select the *Sample Date*.
10. Select the *Sampled By* for the sampler. (Start typing in the name and it will sort.)
11. Select the *Submitted By*.
12. Enter the *Sampled From* location.
13. Select the *Date Received*. (Date received reflects the date the sample is received.)
14. Enter the *Intended Use*.
15. Select the *Material Category*. (Start typing the number and it will sort.)
16. Select the *Material Item*. (Items that have been associated to the Material Category selected will populate in the picklist.)
17. Select *Material Test Method*. (Field will populate if test method association has been made for the material item to test method via Materials > Material Code. Testing Lab association should have been made and should match Testing Lab selection.)
18. Click *Save*.

Notes:

- The Contract ID or CAMMS Project No is required for AST-D, IAS&T-M, and Job Control. The non-CAMMS CPMS Project No is required for Emergency Preliminary, Preliminary, and GeoTech Preliminary. After selection of one of these fields, the other fields will be grayed out.

	Sample Type	Contrac	Project
1	Sample Type	Contrac	Project
2	AMRL	x	x
3	Certification	x	x
4	Comparison	x	x
5	Informational	x	x
6	QCQA Program	x	x
7	Qualified material	x	x
8	Re-evaluation	x	x
9	Small Quantity Visual	x	x
0	Source Approval	x	x
1	Stock	x	x
2	Verification	x	x
3	Visual Inspection	x	x
4	AST-D	required	
5	IAS&T-M	required	
6	Job Control	required	
7	Emergency Preliminary		required
8	Geotech Preliminary		required
9	Preliminary		required

- Once a sample has been added and saved, it will display on the Sample Summary window until the test method association is made.
- Once test method has been associated to the sample, then sample will display at the specific Test Method Summary window.
- Not all samples will be associated to a specific test method.
- The green asterisk indicates that a field is required.

Test Method Sample Summary

Lab personnel will need to navigate to the Tests area where the test method is located and then click the specific test method link to open the window. The Test Method Sample Summary will display a list of samples that have been associated to the specific test method. The Detail link will display on the row for each sample. User can click Detail link to open the Sample Detail window and tab windows.

A sample will display at multiple test-specific Summary windows if multiple tests have been associated to the sample, i.e., if an aggregate and soil tests have been added, the sample will display under the Aggregate Tests Summary and the Soils Tests Summary.

Sample Detail

Lab personnel will be able to edit general information, upload any documents that need to be associated; key in remarks; key in test method data to execute test; generate test report(s); and submit tests/samples for review and approval. The Sample Detail window displays the Sample ID and Sample Card Number at the top of the window.

Basic Procedure
1. After a sample has been added, the Sample Detail window will open. If user has associated a specific test method, then sample can be found at the Test Method Summary window for the specific test method. If no test association has been made, then sample can be found at the Sample Summary window. If user has saved record and needs to update sample, click on the *Detail* link from the Summary window. This will open the Sample Detail window and tab windows.
2. View Detail windows to see tab windows of General Information, Documents, Remarks, Related Test Reports, Sample Approval, and Test Method. (The specific test method name tab will not display until a specific test method has been associated.)

General Information Tab

Lab personnel will be able to edit general information. Entered in Error link is available if user needs to erase sample information from a sample that has been added.

Basic Procedure
1. Sample Detail will open to the *General Information Tab* window.
2. If sample information needs to be updated, the Edit link is available to edit sample. Click on *Edit* link.
3. Click in any fields that need to be edited and make changes.
4. Click *Save*.
5. If sample information was incorrect or entered in error and user wishes to remove all sample information from the sample card, but wishes to reuse the same Sample ID and Sample Card No, then click *Entered in Error*.
6. Pop-up message will display to confirm. Click *OK* to remove information or *Cancel* to return to the General Information Tab window.

7. Click *Save*.

Notes:

- Entered in Error link will completely remove all content, documents, remarks, etc., from the sample.

Documents Tab

Users can upload file documents from their computer to associate to the sample. The window will display documents that have been uploaded and will allow user to open.

Basic Procedure
1. Click on the *Documents Tab* to open the window.
2. Click on the *Upload File* link to open the Samples Documents Add window.
3. Click in *Choose File* field under File to Upload.
4. This action will open available documents from the user's computer.
5. Select and highlight document that is to be uploaded.
6. Click *Open* at the bottom of the dialog box to upload the file.
7. Click in the *Store as File Name* field and enter the name of the document.
8. If sample has associated tests, a Lab Ref No picklist becomes available in order to associate the document to a specific test.
9. Click *Save*.
10. Uploaded document will display under the File Name column. Click on the *file name* link to open and view the file. User can print the document, if desired.
11. Click on *Delete* on the row with the file name to delete document, if needed.
12. Pop-up message will display. Click *OK* to delete or Cancel to return to the Documents Tab window.

Notes:

- User can upload multiple files.
- Filters are available at this window
- Eyeglass icon will display at tab, if there is data on the window.

Remarks Tab

The Remarks Tab window will display any remarks that have been entered and saved. User can add/edit remarks and associate to the sample or a Lab Ref No test, if a test exists.

Sample remarks entered without a Lab Ref No are stored at the Remarks Type window as type = Default and will display on the test report as Sample Remark. Lab Ref No associated remarks will not display on the report.

Basic Procedure
1. Click on the *Remarks Tab* to open the window.
2. Click on the *Add* link to open the Sample Remark Add window.
3. The Lab Ref No picklist will display if a test exists. Select a value, if desired.

4. Click in Remark text box and enter remarks.
5. Click *Save*.
6. If remarks need to be changed or updated, click on *Edit* link to open Sample Remark Edit window.
7. Make changes and *Save*.
8. If remarks need to be deleted, click on *Delete* link on the row with the remark.
9. Pop-up message will display. Click *OK* to delete or Cancel to return to the Remarks Tab window.
10. Click *Save*.

Notes:

- Converted legacy tests that included Control and/or Seal Numbers will display that entry as Remark Type = Smpl Cntrl;Seal.
- Filters and scroll are available on this window.
- Eyeglass icon will display at tab, if there is data on the window.

Related Test Reports Tab

User can view a listing of associated test methods that have had a test executed. If no tests have been executed, then no related test reports will display. User can generate test reports for the sample.

Basic Procedure
1. Click on the *Related Test Reports Tab* to open the window.
2. Click in the *checkbox* on the row to select the test, or tests, to be generated.
3. Click *Generate Report* link to download the test report. User can print test report, if needed.

Notes:

- User can uncheck box if checked by error.
- If multiple tests for the same test method exist, detail for more than one test may appear on the same page, with the signature block available on the last page.
- Filters and scroll are available at this window.
- Eyeglass icon will display at tab, if there is data on the window.

Sample Approval Tab

- Work groups = Samples, Lab Personnel + Office = Testing Lab Office

Lab personnel can submit and review tests associated to samples and approve the sample. This window is grouped by *Test Status* and *Sample Approval Status*. All associated tests must be reviewed before a sample can be approved.

Test Status listing will display all test(s) statuses, test method(s), name of worker who last modified the record, and date modified.

Sample Approval Status will display Approval Status, name of worker who approved the sample, and the date the sample was approved.

After all tests are reviewed, then the sample can be approved and given a disposition status.

If sample details, remarks, or documents are edited, or new tests added for an Approved sample, then the sample will be placed in Amended Status and test(s) will need to be processed through the submit/review/approve steps again. Once you initiate an edit of the test, the sample status changes to Amended and the test report will display Addendum-#. The test report will display a Pending Approval watermark and the approval name and date will be cleared at the bottom of the report.

If the test was not modified, then only the sample will need to be approved again under Sample Status Approval.

- Test Sample statuses are New, Draft, Submit, Review, Reject.
- The Submitter may not be the Reviewer.
- Worker at Testing Lab that is executing the test should receive the Edit link to submit the test.
- Reject returns status to Draft.
- On save of review of the last test method, Edit/Approval link appears to allow disposition selection (sample status).
- On save of disposition sample status, the sample is auto approved and Edit/Approval link is suppressed.
- If tests were not edited when status was set to Amended, then only the sample needs to be approved.

Basic Procedure
1. Click on the *Sample Approval Tab* to open the window.
Test Status
2. If test has status of New, then the test has not been run and needs to be executed.
3. If test has status of Draft, Submitted, Reviewed, Rejected, or Amended then click *Edit* link to open Test Method Approval window.
4. At Test Method Approval window if Draft Status: Click *Test Status* and select *Submitted*. Click in *Remark* and enter *remarks*, if needed, and *Save*.
5. At Test Method Approval window if Submitted Status: Click *Test Status* and select *Reviewed or Rejected*. Click in *Remark* and enter *remarks* (required if Rejected). Click *Save*. (Note: Person who submitted the test cannot be the same person to review the test.)
6. At Test Method Approval window if Rejected Status: Repeat steps for Submitted and Reviewed.
7. At Test Method Approval window if Amended Status: Repeat steps for Submitted and Reviewed.
Sample Approval Status
8. After all associated tests have been executed, submitted, and reviewed, then *Edit* link will display under Sample Approval Status group. Click *Approve* to open Sample Approval window.

9. At Sample Approval window: Click *Sample Status* and select a value that indicates the disposition of the sample. Click in *Remark* and enter remarks, if needed. Click *Save*.

Notes:

- All tests associated to the sample must be reviewed before the sample can be approved.
- On Save of Sample Status disposition, the sample will be approved.
- Eyeglass icon will display at tab, if there is data on the window.

Test Method Tab

Lab personnel can add/edit sample information to execute test and can also execute a Retest on existing sample information.

- Work Groups = Samples, Lab Personnel

Basic Procedure
1. Click on the specific *Test Method Name Tab* to open the window.
2. If test has not been executed, click *Add* to create a Test. Enter test data. Click *Save*.
3. If test needs to be edited, click *Edit*. Make changes and *Save*.
4. If Retest of existing test is needed, click *Retest* to execute the test.

Notes:

- If test has not been associated to the sample, then navigate to the General Information Tab window, click on Edit link, and associate the test method. The specific test method name tab will then display at the Detail window.
- The *Retest* link displays for samples added in CAMMS, and converted samples whose Sample Date is => 03/01/2018.
- Executing *Retest* will create a new Lab Ref No test. To Edit a prior Lab Ref No test, locate the test at the Test Method Sample Summary, click Detail, access the Test Method tab, then click Edit. All added tests require submission and review at the Sample Approval > Test Status area.
- Eyeglass icon will display at tab, if there is data on the window.

Other:

Sample Search for Test Reports

Users can utilize Search at SysAdmin > Search > Sample to view sample information and generate testing reports. Search results will return Sample ID, Sample Card No, Status, Contract ID, Project No, Sample Type, and Testing Lab.

Basic Procedure
1. Click on the *Search* icon on the bottom toolbar or via SysAdmin > Search.
2. Click on *Sample* on the left-hand menu.
3. At Sample Search window, enter the search parameters and click *Search*.

4. Search results will return.
5. Filter can be used to located specific sample.
6. If sample has an associated test that has been executed, the PDF icon will display. Click on the *Sample ID* PDF to generate and view the test report.

Notes:

- PDF link will display if a test has been executed.
- No PDF link will display if test has not been executed.
- Filters are available at this window.
- Eyeglass icon will display at tab, if there is data on the window.