

Quick Reference Guide

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Sample checklist not updating - Why?

You have created sample records to satisfy Sampling and Testing requirements on contract pay items. Yet the sample is not showing up as having been done on your sampling checklist. Later this could result in Material discrepancies on the estimate. How do you fix this?

There are two primary areas you will need to look at:

- Sampling Checklist
- Completed Sample Records

Sampling Checklist:

Always have a copy of the sampling checklist on hand when filling out the Sample Information Window. There are certain choices that must be made from pick lists on the sample information window that must match exactly what is shown in the sampling checklist (also shown in contract S&T requirements). If these do not match, the sample record will not count and your sampling checklist will not show the sample as being completed. See the QRG, "Sampling Checklist".

Completed Sample Records: (This information is more thoroughly covered in the Policy and Procedures.)

In addition to necessary documentation of sampling and testing activities, there are certain fields in the sample information window that must be correctly filled out for the sample to satisfy contract S&T requirements. These are:

- **Smpl Type:** must match what is shown on sampling checklist
- **Acpt Meth:** must match what is shown on sampling checklist
- **Material:** must match what is shown on sampling checklist
- **P/S:** IF a Producer/Supplier was chosen in the contract S&T requirements window, this must match what is shown there.
- **Status:** must be either:
 - ✓ 4a: Meets
 - ✓ 4c: Fail & Accepted
- **Contract Tab:** contract and line item must match what is shown on sampling checklist. Input Represented quantity.
- **Test Tab:** Test Method must match what is shown on sampling checklist. Include Actual Completion Date.
- **Sample must be authorized.**

After authorizing a properly completed sample, the sampling checklist process automatically updates the sampling checklist for the pay item(s) selected on the contract tab.

If the sampling checklist does not appear to have been updated after authorizing a properly completed sample record, it is strongly recommended to run the Sample checklist process (There has been a documented case where the process had to be manually run because the checklist didn't automatically update.).

To run the Sampling Checklist Process, navigate to:

- Main Panel > Materials Management > Process List
- Double click on the RMMSMPCL Process ID

- Select your contract and click Submit

Additional information about the sampling checklist can be found in the QRG, "Sampling Checklist".

If after following all of the steps above, and verifying the sample record is properly filled out and authorized, and you still are having problems, submit a SSS Lotus Notes Support Request.

Revision Notes:

10/05/2006: Added instruction to run the sampling checklist process.