

11-3

Sampling:

**Authorizing and
Unauthorizing a
Sample**

Objectives

Authorize a Sample

Unauthorize a Sample

Overview

To streamline the authorization process as much as possible, HiCAMS will aid in the authorization of parts and samples whenever possible. The following paragraphs describe in detail how statuses and authorizations for samples and parts relate.

There are five rules governing status changes and authorizations for samples and parts:

- ◆ Before the system or the user can set the test format to a “completed” status, at least one test result must be entered.
- ◆ All test formats associated with a part must be set to a “completed” status before the status of the part can be set to one of the completed statuses.
- ◆ A part must have a completed status before it can be authorized.
- ◆ All test formats associated with a sample must be set to a “completed” status or all parts must be authorized before the status of the sample can be set to one of the “completed” statuses.
- ◆ A sample must have a “completed” status before it can be authorized. Depending on how many test formats are associated with the sample/part, status changes and authorizations can occur in different ways.

Scenario 1: One sample and one test format associated with that sample:

If there is only one test format associated with a sample, the owner of the test format must be the same as the authorizer of the sample. If the user entering the test results has security to authorize a sample, this user will be prompted by the system to determine if he/she wants to change the status of the sample and authorize the sample. Since no other test formats are involved, if the status of the one test format is “Meets Specs”, the sample status will default to “Meets Specs” in the system prompt and the user can

authorize the sample. If the user would like to change the sample status at this point, the user can prior to authorizing the sample. However, if the status of the only test format is NOT “Meets Specs”, the sample status will NOT default. Instead the user will be prompted to enter a sample status in order to authorize the sample.

If the user changing the status of the test format does NOT have security to authorize a sample, the sample will show up on the Sample Authorization window for authorization by appropriate personnel once the test status has been set to a “completed” status.

Scenario 2: One sample, multiple parts, and one test format associated with each part:

If there is only one test format associated with each part and there are multiple parts on a sample, the owner of the test format for a given part must be the same as the authorizer of the part. If the user entering the test results has security to authorize a part, the user will be asked if he/she wants to change the status of the part. Since no other test formats are involved, if the status of the one test format is “Meets Specs”, the part status will default to “Meets Specs” in the system prompt and the user can authorize the part. If the user would like to change the part status at this point, the user can prior to authorizing the part. However, if the status of the only test format is NOT “Meets Specs”, the part status will NOT default. Instead the user will be prompted to enter a part status in order to authorize a part.

Whether the last part that is authorized belongs or does NOT belong to the Authorizing Lab of the sample and if all parts have final statuses set to “Meets Specs”, the system will automatically authorize the sample with a sample status of “Meets Specs”.

If the last part authorized belongs to the Authorizing Lab of the sample and if at least one part status is NOT “Meets Specs”, the user will be asked if he/she wants to change the status of the sample and authorize the sample. Since the status of at least one part is NOT “Meets Specs”, the sample

status will NOT default. The user will have to enter a sample status prior to authorizing the sample.

If the last part that is authorized does NOT belong to the Authorizing Lab of the sample and if the part statuses are NOT all “Meets Specs”, a notification will be sent to the Authorizing Lab of the sample requesting authorization of the sample. The Dominant Lab will then authorize the sample through the Sample Authorizations window.

If the user entering test results does NOT have security to authorize a part, the part will show up for authorization in the Sample Authorization window by appropriate personnel.

Scenario 3: One sample and multiple test formats associated with that sample:

If there are multiple test formats associated with the sample and they are all processed by the authorizing lab AND if the user entering the last of the test results has security to authorize a sample, the user will be prompted to change the status of the sample and authorize the sample. Again, if all the test formats had statuses of “Meets Specs”, then the sample status would default to “Meets Specs”. However, if the test format statuses are NOT all “Meets Specs”, the sample status will NOT default. Instead, the user will be prompted to enter a sample status in order to authorize the sample.

If the user entering the last of the test results does NOT have security to authorize a sample, the sample will show up for authorization in the Sample Authorization window by appropriate personnel.

Scenario 4: One sample, multiple parts, and multiple test formats associated with each part:

If there are multiple test formats associated with each part and there are multiple parts on a sample, the owner of the test format(s) for a given part must be the same as the authorizer of the part. If the user entering the last of the test

results has security to authorize a part, the user will be prompted to change the status of the part and authorize the part. Again, if all the test formats had statuses of “Meets Specs”, then the part status would default to “Meets Specs”. However, if any of the test formats had a status other than “Meets Specs”, the part status will NOT default. Instead, the user will be prompted to enter a part status in order to authorize the part.

Whether the last part that is authorized belongs or does NOT belong to the Authorizing Lab of the sample and if all parts have final statuses set to “Meets Specs”, the system will automatically authorize the sample with a sample status of “Meets Specs”.

If the last part authorized belongs to the Authorizing Lab of the sample and if at least one part status is NOT “Meets Specs”, the user will be asked if he/she wants to change the status of the sample and authorize the sample. Since the status of at least one part is NOT “Meets Specs”, the sample status will NOT default. The user will have to enter a sample status prior to authorizing the sample.

If the last part that is authorized does NOT belong to the Authorizing Lab of the sample and if the part statuses are NOT all “Meets Specs”, a notification will be sent to the Authorizing Lab of the sample requesting authorization of the sample. The Dominant Lab will then authorize the sample through the Sample Authorizations window.

If the user entering test results does NOT have security to authorize a part, the part will show up for authorization in the Sample Authorization window by appropriate personnel.

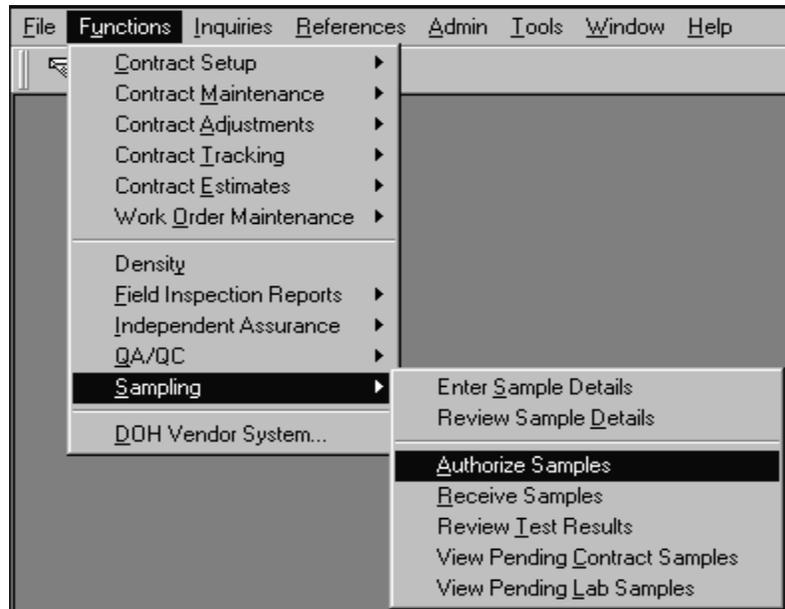
Authorizing a Sample

Only laboratory supervisors and other authorized personnel are permitted to authorize samples.

Note: *This procedure can also be performed on the **Review Sample Details** window by clicking the **Authorize** button.*

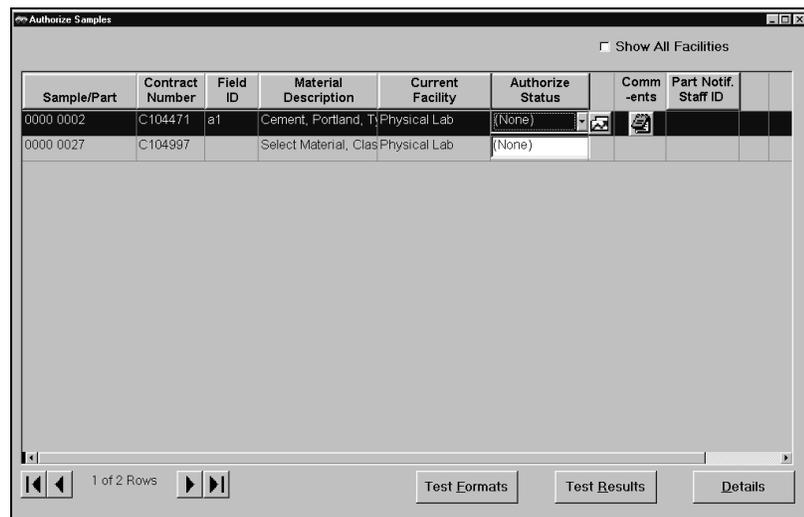
Step 1: Log onto HiCAMS, using the instructions in *HiCAMS: Getting Started*.

From the **Functions** menu select **Sampling**. From the



Sampling Submenu select **Authorize Samples**.

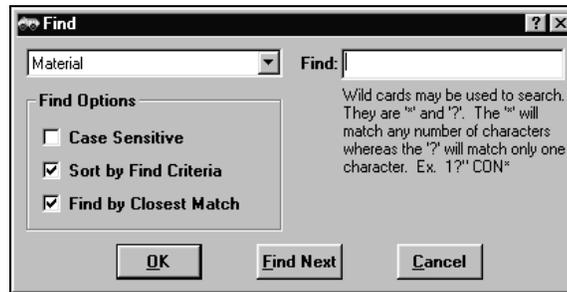
The Authorize Samples window displays, listing all samples that can be authorized by your facility.



Tip: If you wish to display samples that can be authorized at all facilities, click the check box at the left of **Show All Facilities** in the upper right corner of the window.

Step 3: Locate the sample you wish to authorize, using the scroll bar on the right side of the window, if necessary.

Tip:  You can also click the **Find** button on the toolbar or choose **Find** from the right-click menu to access the **Find** window.



1. From the drop-down list, select the field you wish to search. Choices include: Sample/Part, Material, Contract Number, Contract Field ID, and Current Lab.
2. In the **Find** field, type the text you wish to locate.
3. Select appropriate **Find Options**.
4. Click the **OK** button to begin the search.

Step 4: Select the row containing the desired sample.

Note: If you need to view detailed information about the sample, access the **Review Sample Details** window by double-clicking the selected row or by clicking the **Details** button. Remember, however, that if you select the **Details** button prior to saving, the sample remains unauthorized.

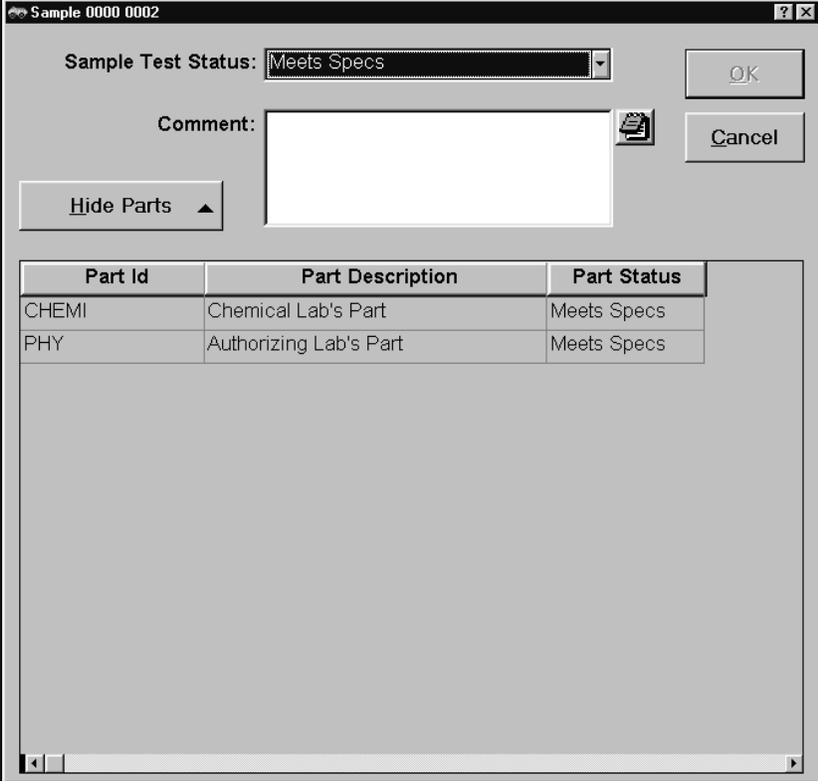
Step 5: Select the status (based on the test results) from the **Authorize Status** list box.

If you have not saved, this action can be undone by selecting **(None)** or by closing the window.

Authorize Status Details

Step 6:  To get detailed information regarding the status, click the **Authorize Status Details** icon at the right of the **Authorize Status** column.

The **Authorize Status Details** window displays. The **Sample Number** displays in the title bar:



Sample 0000 0002

Sample Test Status: Meets Specs

Comment:

Hide Parts ▲

Part Id	Part Description	Part Status
CHEMI	Chemical Lab's Part	Meets Specs
PHY	Authorizing Lab's Part	Meets Specs

OK

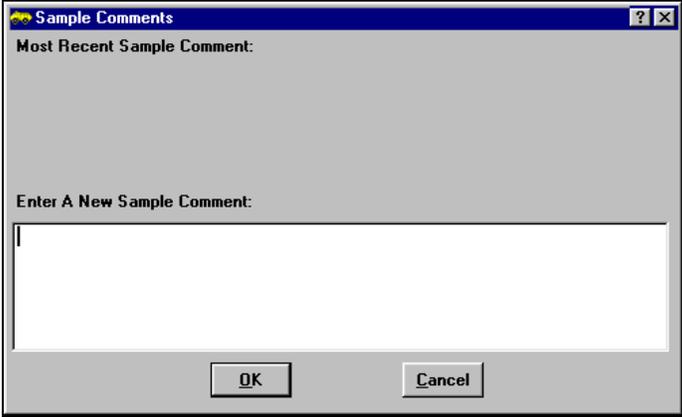
Cancel

Tip: Click the **Hide Parts** button to hide the detail in the lower portion of this window.

Sample Comments

Step 7:  To add a comment about the authorized sample, click the **notepad** icon in the **Comments** column.

The **Sample Comments** window displays:



Sample Comments

Most Recent Sample Comment:

Enter A New Sample Comment:

OK

Cancel

Step 7: Type comments for the sample you are authorizing.

Step 8: Click **OK** to save the comment.

Save the Sample

Step 9:  At this point, you can click the **Save** button on the toolbar to save the authorized sample.

The authorized sample disappears from the list.

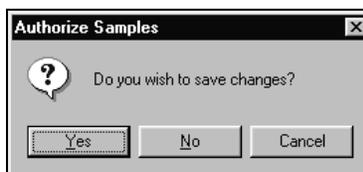
Note: *If you are authorizing several samples, you may wish to save after all samples have been authorized.*

Authorizing Multiple Samples

Step 10: Repeat the steps above for each sample you wish to authorize.

Step 11: When you finish authorizing samples, close the **Authorize Samples** window.

If you have not saved your changes, the following message displays.



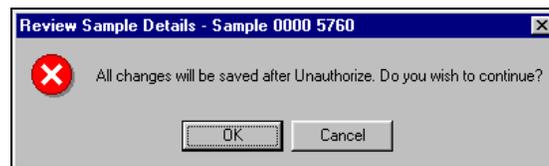
Step 10: To save changes and authorize the sample(s), click **Yes**. To cancel the authorizing process, click **No**. To return to the **Authorize Samples** window, click **Cancel**.

Unauthorizing a Sample

In order to unauthorize a sample, the **Review Sample Details** window must be open to the sample you wish to unauthorize. Remember that only laboratory supervisors and other authorized personnel are permitted to unauthorize samples.

Step 1: Click the **Unauthorize** button at the bottom of the window.

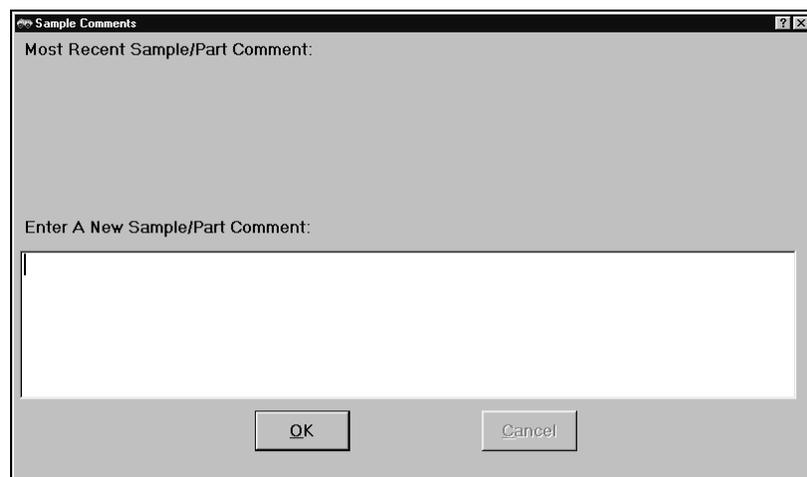
The following message displays:



Step 2: Click **OK** to unauthorize the sample.
Click **Cancel** to cancel the unauthorizing process.

Sample Comments

If you clicked **OK**, the **Sample Comments** window displays.



Step 3: Type comments for the sample/part you are unauthorizing. These comments will display in the **Comments** section of the **Review Samples Detail** window.

Note: *Your comments are limited to 240 characters, including spaces and all forms of punctuation.*

Step 4: Click **OK** to save the comment.

The **Send Notifications To...** window displays. In the **Send To** section are listed the names of those to be notified of your unauthorization action. They will receive the comments you entered in the previous step.



Step 5: To add a recipient to the list, click the **Add Staff** button.

Step 6: To remove a recipient from the list, highlight a name, then click the **Delete Staff** button.

Note: *You may remove only names you have added.*

Step 7: To forward your comments to the listed recipients, click the **Send** button.

Note: *This window will not close until you click the **Send** button.*