SiteManager sample records must be logged to satisfy Sampling and Testing Requirements (S&TR’s) on Drilling Contracts. S&TR’s are Material Acceptance requirements, basically, how do we accept this material, for this pay item, on this contract. Sometimes, all that is needed is a check of the approved list. Sometimes, a cert from the manufacturer is required. Regardless, a SiteManager sample record is created to satisfy the S&TR.

Presently, there are six (6) Material Codes for documenting the receipt of Drill Hole samples at the Lab, as specified in §648-3, or by the Contract, if different. Each type of Drill Hole sample received will have a different SM Material Code. See screen shot. Drill Hole samples delivered to the Lab can be documented in SM by creating a SiteManager sample record. These types of samples are called Documentation Samples, and can be treated like a cert; the Contractor is certifying that he took the samples and delivered them in accordance to the Specs.

Do not confuse SM Material Code with the actual material sampled. The SM Material Code is not “Silty SAND”, etc., but rather Jar Sample, AX Core, etc. The reason for separate Material Codes is to track S&TR’s, allowing the EIC to pay for the jar samples when they have been delivered to the Lab, but withhold payment for the rock cores the Contractor has not delivered. If the Lab received a bunch of Drill Hole samples, and logs sample records into SiteManager to cover them all, only to find later that several samples are unsatisfactory, i.e., jars are broken, etc, correcting SiteManager sample records can be entered for these. This SiteManager sample record can be created days or weeks after the Drill Hole samples have been received. SiteManager will reconcile this in the next Estimate, and only pay for satisfactory Drill Hole samples. This allows the EIC to pay the Contractor without the need for the Lab to process every Drill Hole sample immediately.
Quick Reference Guide
Receiving Drill Hole Samples to the Lab

Scenario 1: The contractor drops off 10 Jars for DA-B-1, 15 jars for DA-B-2, 10 feet of rock core from DA-B-2, 13 jars for DN-B-3, 5 feet of Rock core from DN-B-3, and 15 jars for DA-B-4.

Sample 1: For 53 Jars received at the Lab, log a SiteManager sample record

- **Basic Sample Data Tab**
  - **Note Sample ID** for later use in LIMS
  - **Fill out Sample Date**
    - Date could be delivered date, not date the hole was drilled, since the SiteManager sample record could cover more than one day’s drilling.
  - **Sample Type**
    - “Project Material Acceptance”
  - **Material Code**
    - 732-1301, Jars Received
  - **Geographic Area**
    - Your Region

- **Contracts Tab**
  - Choose **Contract** and **Pay Item**
    - **Pay Item should be the Sample Item, not the Drilling Item.**
      - 648.11, Split Barrel Sample
    - Enter **Represented Quantity** as the number of Jar Samples received, as the Pay Item unit is “Each”
      For this example, 53

- **Other Tab**
  - Choose **Destination Lab** from dropdown
  - Choose **Your Regional Lab**

- **Assign Tests**
  - Accept Defaults
  - If you click **More…**, the only test should be **Drill Hole Samples Received at the Lab**

- **Go to LIMS**
- **Receive Sample to Lab Unit**
  - Locate the appropriate sample to receive in grid
    - Use quick filter based on Sample ID or Lab Reference Number
  - Check Sample Received (at left side of row)

- **Enter Test Results Queue**
  - Find your sample, using the filter criteria, by Sample ID, Lab Reference Number, etc.
  - Open the test template by selecting the correct row on top grid, test screen opens at the bottom.
  - Fill in Drill Hole samples received
    - For example, “DA-B-1, J1 - J10, DA-B-2, J1 - J15”

If desired, the logs can be scanned and attached to the SiteManager sample record as a .pdf file(s), to keep a copy of them permanently in the SiteManager database.
For the next two samples, it is possible to use the Services, Copy Sample menu option in SM. This will copy much of the existing record to a new record, while allowing the user to change data. The user is cautioned when using this functionality to copy samples of different Material Codes. The Material Code will “gray out”, and become un-editable when you first save the new record. You must change it to the new Material Code for the Rock Cores for the next two samples in our example scenario. Remember, the jars and the cores will have different Material Codes, including a separate code for AX and NX core. Also, the user must choose a new Pay Item, since the Material Code for Jar Samples will not be associated to Rock Cores.

Sample 2: For 10 feet of AX Core received at the Lab
   Sample Type = Project Material Acceptance
   Material Code = 732-1303, AX Core Received
   Pay Item = 648.13, Rock Core Drilling, AX
   Contract Tab, Represented Qty = 10

Sample 3: For 5 feet of NX Core received at the Lab
   Sample Type = Project Material Acceptance
   Material Code = 732-1305, NX Core Received
   Pay Item = 648.15, Rock Core Drilling, NX
   Contract Tab, Represented Qty = 5

Scenario 2: You find that several jars were broken, or not sealed, etc. Since you have already received them, it is necessary to create another Sample record with a negative Represented Qty, to remove the "acceptance" of these jars. The Contractor should not be paid for these.

Sample 4: For two Jar Samples that are not satisfactory
   Sample Type = Project Material Acceptance
   Material Code = 732-1301, Jars Received
   Pay Item = 648.11, Split Barrel Sample
   Contract Tab, Represented Qty = -2

Sample 4 can be created days or weeks after the samples have been received. SiteManager will reconcile this Sample in the next Estimate, and only pay for satisfactory samples. This allows the EIC to pay the Contractor without the need for the Lab to process every sample immediately. The input box on the Test Method should be filled in to explain the un-acceptability of these samples: “DA-B-1, J3 broken.”