For greater transparency into the steps or actions in the sample testing process in the Sample Log (i.e. sample prep, processing, testing) you can define Sample Progression Steps.



Defining Sample Progression Steps:

Sample progression steps Description	Click the green "	+" to add a new step		QK
Step number Description is a required field. 1 Perform Tes Describe what the user is marking as	Min duration None	Warning time None	Max duration 1 day	Cancel
Add a Step	Min duration of time it sho The step can Min duration	Ok (optional) is the mini puld take to complete not be marked as com requirement has bee	mum amount a sample step. plete until the n met (if any).	Total Min: None Total Max: 1 day
Row will be added above the cuu Max duration (required) is the total amount the step to occur. For a user defined step, th as complete in the sample log. For the final user to save the test results in TrueChem. Th	rrent row of time you want to al his should include the t "Perform Test" step, th his is also the time at w	low for ime for the user to ma is should include the f rhich the status/state	ark the step time for the will turn red.	

Step number	Description	Starts at	Min duration	Warning time	Max duration	<u>C</u> ancel
1	Prep Sample for Processing	Sample creation	None	1 day	2 days	
3	Sample Processing Perform Test	End of previous step	None	2 days	4 days	Т
aware of what the new step w	step is highlighted when adding ill be inserted ABOVE the active	; new steps, row		Total Min = cun Total Max = cun	nulative min duration time	from all steps from all steps
aware of what the new step w	step is highlighted when adding ill be inserted ABOVE the active	; new steps, : row		Total Min = cun	nulative min duration time	from all steps from all steps

The final step "Perform Test" will be pre-populated for you with a default Max duration of 1 day. Make sure to modify the Minimum, Warning, and Max durations on the Perform Test step if needed.

Checking "Fixed completion date" means there is a fixed end date that is the primary consideration when completing steps. It is not reasonable to expect that each step is marked as complete at exactly the defined max duration. In most cases the steps leading up to Perform Test will either be marked as complete earlier or later than the max duration. If a step is completed early, the amount of time between early completion and max duration is time that will be distributed proportionally to the remaining steps. If a step is completed late, the amount of time between max duration and late completion will be subtracted proportionally from the remaining steps. The proportional distribution and/or subtraction of time allows for the fixed end date to remain the same. If you do not have a fixed completion date, each step's timely completion will have no

impact on the allotted times of the following steps. In the example above, regardless of if the first step of "Prep Sample for Processing" is

In the example above, regardless of if the first step of "Prep Sample for Processing" is marked as completed after 1 day (early) or 3 days (late), the timer for the next steps starts immediately with a max duration of 4 days and would move the target for the overall completion of the sample progression.

*This choice will impact the overall allotted time discussed in the section below.

<u>Setup Other Schedule → Create Progression Sample</u>

You can schedule test(s) to be completed using a defined sample progression steps by adding an "Other Schedule" item in object setup.

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Anodize	Test Schedules		
Chrome Dama Process			× 5
Chem Film Tank#1 1 Go	to tank setup tion	Schedule Frequency	Frequency level Start date/time
D01 - Degrease	Appearance	Not Scheduled	Normal
🍝 D02 - Etch	Thickness	Not Scheduled	Normal
- a D03 - Activator	BendAdhesion	Not Scheduled	Normal
- 👗 D06 - Demo Tank	Corrosion Resistance	Not Scheduled	Normal
- 🔬 D07 - Ripse	Hydrogen Embrittlement	Not Scheduled	Normal
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	- Other Schedules	3. Click green "a" bu	top to add
ID - 89 🔺		new other scheduled	

cheduled Item		ranaan Control	then select t	ne test(s) that will be tied to the fi	inal step	
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*Allotted time varies based on whether the selected sample progression steps has "Fixed completion date" checked in the definition, and if the scheduled item has "Auto-execute the action" checked on the other schedule item. (For the time being, put a "1 day" for allotted time).

<u>Example 1</u>: Sample progression steps with a fixed completion date and an "Other Schedule" that is set to auto-execute the action will have a total allotted time equal to the max duration of the sample progression steps used.

In the example below, every 10 days a new sample is created in the sample log, starting the timer on the first step in the sample progression.

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		the sample will display as red. The sample will turn black once the step is marked as complete and the next step becomes	active.

View in Sample Log when Other Schedule Becomes Due:

Once you get to the final step, Perform Test, the associated test(s) will be inserted into the schedule log. The only way to complete the final step is by performing the test.

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sloc	Help												
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Ø	 ⊻iew Type	Currently Schedule	d Items 💌	Show timeline g	raph	The final step "Perform Type: One time Re-Test	Test" will appear in the s and Due caused by: Sam	chedule log with ple progression s	teps			Sche	adule
	Drag col	lumn headers here to	group by						+ 3 2 😫	<u>μ</u> τ _z		* =	1
	Status	Type 🗲	Due By	Remaining	Priority	Item Description	Tank	Process	Due caused by	Tank# Ter	mp	Freq	uer .
	Due	One time Re-Test	5/25/2024 6:00 AM	8-19:38	1	Appearance	Process Control Testing	Demo Process	Sample progression steps			One time	Re
	Due	One time Re-Test	5/25/2024 6:00 AM	8-19:38	1	Hydrogen Embrittlement	Process Control Testing	Demo Process	Sample progression steps			One time	Re
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on	Due	One time Re-Test	5/25/2024 6:00 AM	8-19:38	+	T If the sample progressi	on steps definition has a f	ixed completion of	date, the Due By date sho	uld match		One time	Re
	Due	Test	5/16/2024 6:00 PM	0-07:38	3	what was calculated by	the fixed completion at t	he time the samp	ole was created.		0*	Daily	
	Due	Test	5/16/2024 6:00 PM	0-07:38	3	of If the item does NOT ha	ave a fixed completion dat	te, the Due By Da	te will be the date/time the	ne item moved	0*	Daily	- 1
	Due	Test	5/16/2024 6:00 PM	0-07:38	3	to the "perform test" st	tep + the time set as the N	Max duration for t	he perform test step		0.	Daily	

Example 2:

When the other schedule does NOT auto-execute the action the total allotted time will equal the max duration of the sample progression steps used + the allotted time of the schedule frequency. The fixed completion date is calculated from the time the sample is created from the schedule log. Any time gained or loss from the schedule frequency allotted time based on early/late schedule completion has no impact on the time allotted for sample progression steps.

heduled Item	OK				Tank Sa
Description Anodize Monthly 3rd party Testing					Tank Se
Priority 10 - Action Create progression sample	<u>Cancel</u>	~			
Can NOT be deactivated Test Description	Help	Schedule	Make-up	Docs	Safety
Issue paperless Appearance Thickness	LastDone	rom a sample progr	ession steps definition wi	ith a fixed completio	n date
Type Process Control Bend Adhesion		he Total Max time (2	28 days) is used when det	ermining overall allo	otted time
Allotted Time 2 + 28 = 30 Days Max Total	aduled			Normal	eurrie
Effort None Steps Monthly 3rd Party Testin	g (28 Days) V			Normal	
	iduled			Normal	
Frequency Process Input Triggers	iduled adulated			Normal	
Auto-execute the action	Sample pro	ression steps		Tround	1 1
Normal Monthly 5th of Every Month		Description Hoothly 2rd	Party Tacting (20 D)		
Accelerated Same as Vormal		Description womany sic	Trany resulty (20 Dr		QK
Decelerated Same as Normal	Step numb	Collect Sample	Starts at Max of Sample creation 3 days	duration Min duration	<u>C</u> ancel
	2	Ship Sample	End of previous step 3 days	None	
	3	Perform Test	End of previous step 22 days	None	Total Mir
Schedule Selection					1von
C None C Yearly C Monthly C Weekly C Daily C	Shift				Total Ma 28 day
Vse custom frequency description					
Description Monthly 15th of Every Month Short description Monthly					
Schedule Times					
Start Time 6:00 AM	Fixed c	mpletion date			
Pull sample None before start			in the state of all states of all second	will equal the	
Puil sample None before start Monthly Schedule	When the item is NOT set to Au	to-execute the action	on, the total allotted time	winequaltie	
Pull sample None before start Monthly Schedule	When the item is NOT set to Au Total Max (28 Days) from the sa	to-execute the action mple progression st	eps + the Allotted Timefr	om the schedule	
Pull sample None before start Monthly Schedule	When the item is NOT set to Au Total Max (28 Days) from the sa frequency definition (2 Days). T	to-execute the actic mple progression st he fixed completion	eps + the Allotted Timefr date (if selected) is calcu	om the schedule lated at the	

In this example, every month on the 15th, an item will appear in the schedule with a due date set to the allotted time of the schedule frequency (2 days). When you are ready to start the sample progression step timer, double click on the scheduled item or click the do now button. This creates a sample in the sample log and starts the timer on the fixed completion timer and sets the due date to the max duration of the first step in the progression. Note: Because the scheduled item could be completed and moved to the sample log earlier or later than the exact allotted time of the schedule, the fixed completion date will be calculated from the time the item moves from the schedule to the sample log instead of the time the item shows up on the schedule.

 ⊻iew Type	Currently Schedule	ed Items • O	ther schedule ppear in the s me of the sch	ed items schedule	that are NOT set to auto-exe log, and have a Due By date equency definition	ecute the action = to the allotted					Schedule
Drag co	lumn headers here to	o group by						🛨 🛓 😫 🔚) 🧸 🛛	Σ _X 🛱	
Status	Туре	Due By	Remaining	Priority	Item Description	Tank	Process	Due caused by	Tank#	Temp	Freque
Due	Process Control	5/17/2024 6:00 AM	1-13:42	10	Anodize Monthly 3rd party Testing	Anodize Process Control Testing	g_ Anodize	Schedule Frequency			Monthly 15th of E
					TrueChem TrueCh	e Samples have been created	To create the sample needs to either doub choose "Do Now".	and start the samp ele click on the item	ble progre , or highl	ession step: ight the ite	s, a user m and

Once the sample is created from the schedule, the sample appears in the sample log with a due date of the max duration of the first step in the sample progression and the user can proceed with completing the sample progression steps

Help Help
Image: Solution of the second seco
View Outstanding samples Sample log For Dates 3/16/2024 4.22 PM Sample description Sample Number: Due Br/ Date Process Tank Sample description Sample description Sample description S2024-00003 5/18/2024 Anodize Anodize Process Control Testing Collect Sample Anodize Monthly 3rd party Testing (28 Days) S2024-00002 5/17/2024 Chrome Processing 10 Day Chrome Process Control Testing Tep Sample for Processing 10 Day Chrome Process Control Testing (10 Days)
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S2024-00001 5/20/2024 Demo Process Process Control Testing Sample Processing 10 Day Demo Process Control Weekly Sample Testing (10 Days)

If you have any questions or need any help, please contact technical support at 1-800-448-2548 ext. 202