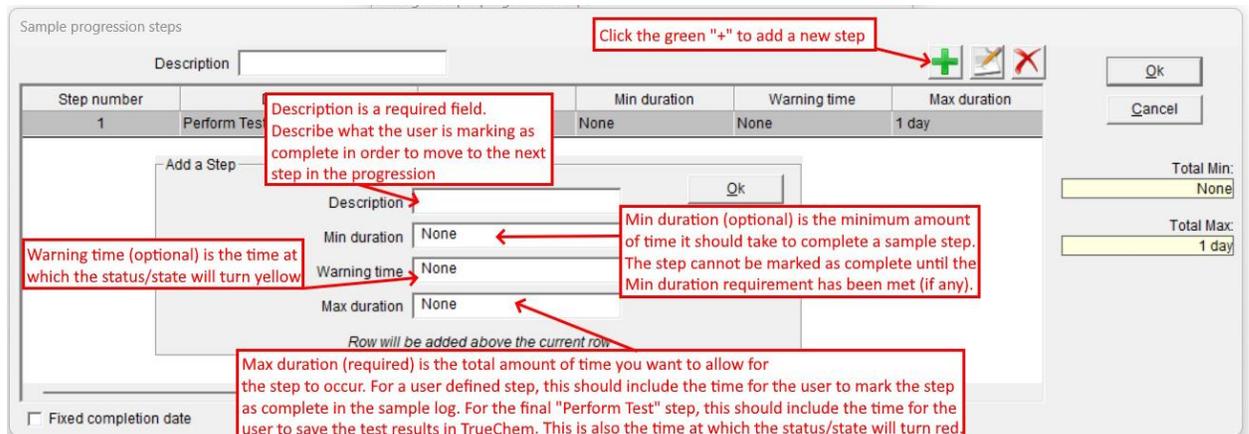
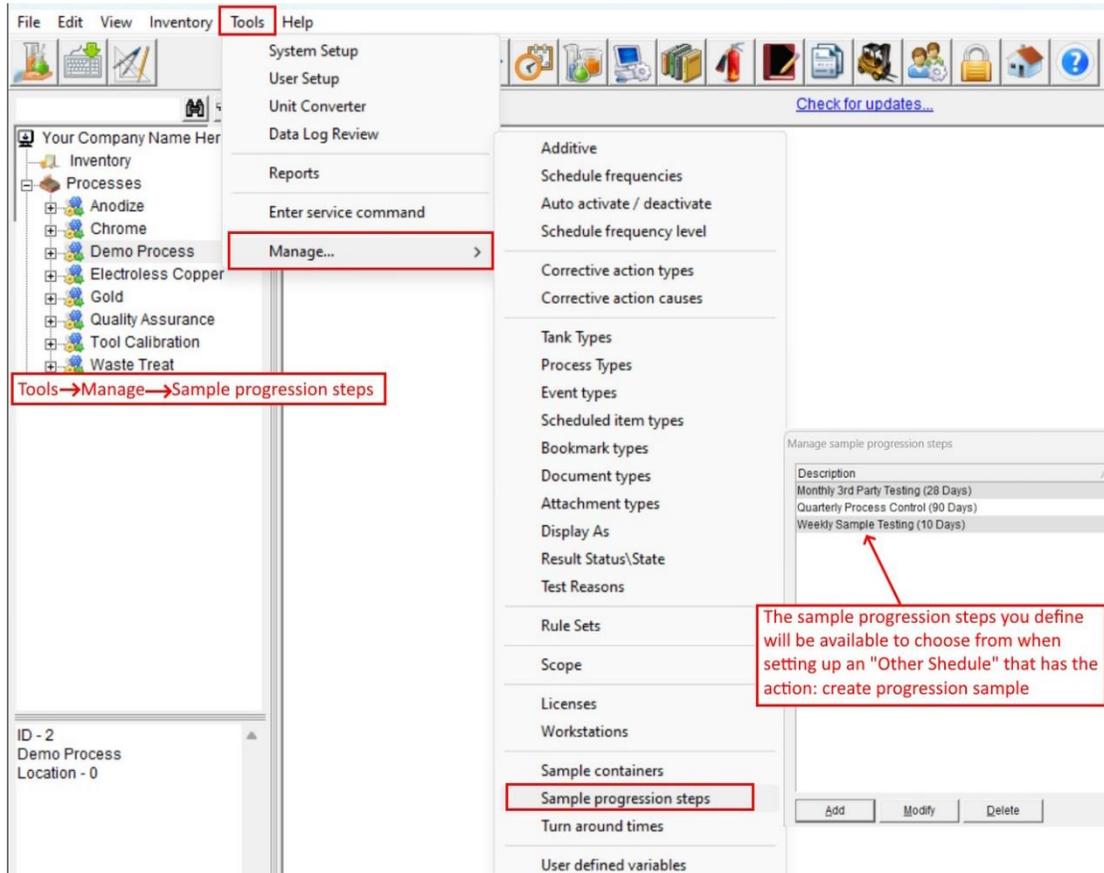


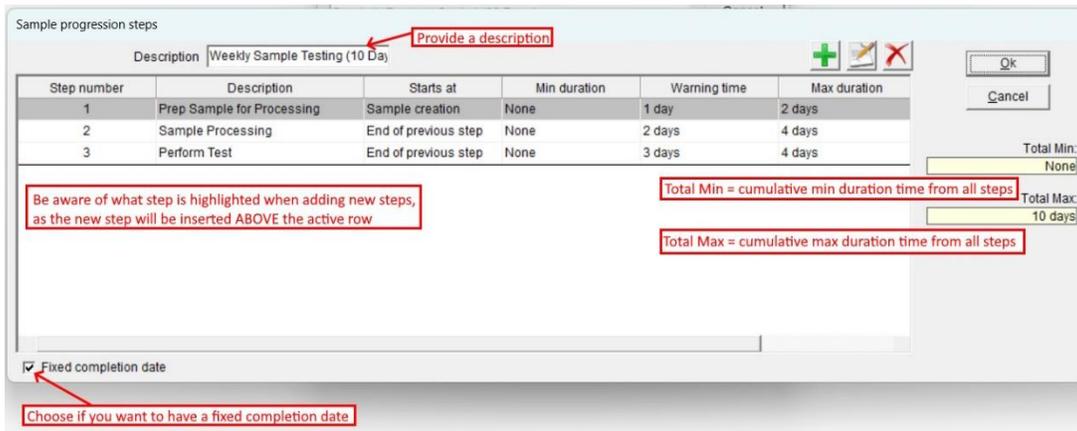
TrueChem: Sample Progression Steps

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:



TrueChem: Sample Progression 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.

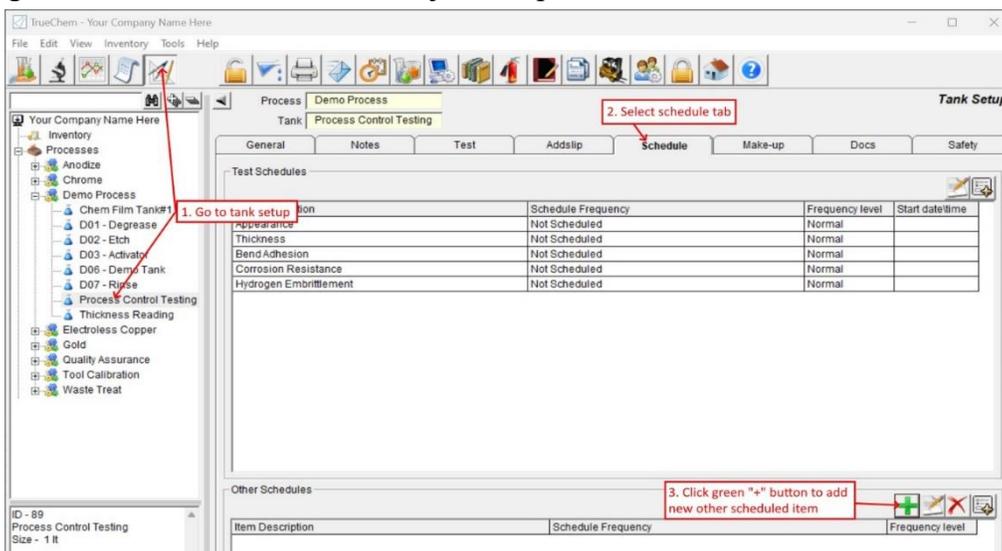
If you do not have a fixed completion date, each step’s timely completion will have no impact on the allotted times of the following steps.

In the example above, regardless of if the first step of “Prep Sample for Processing” is 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.

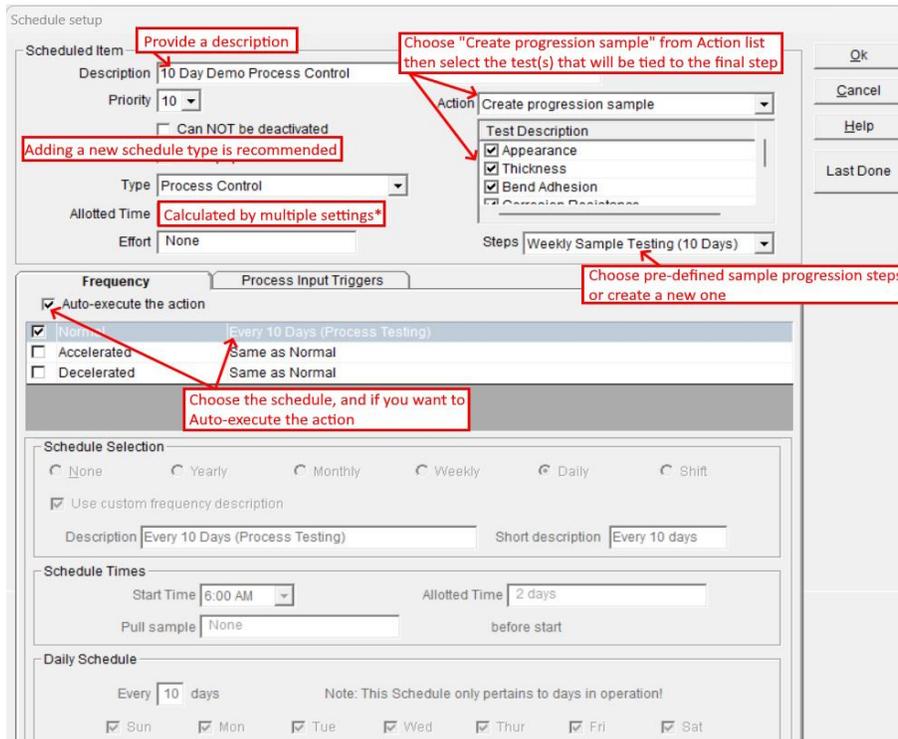
*This choice will impact the overall allotted time discussed in the section below.

Setup Other Schedule → Create Progression Sample

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

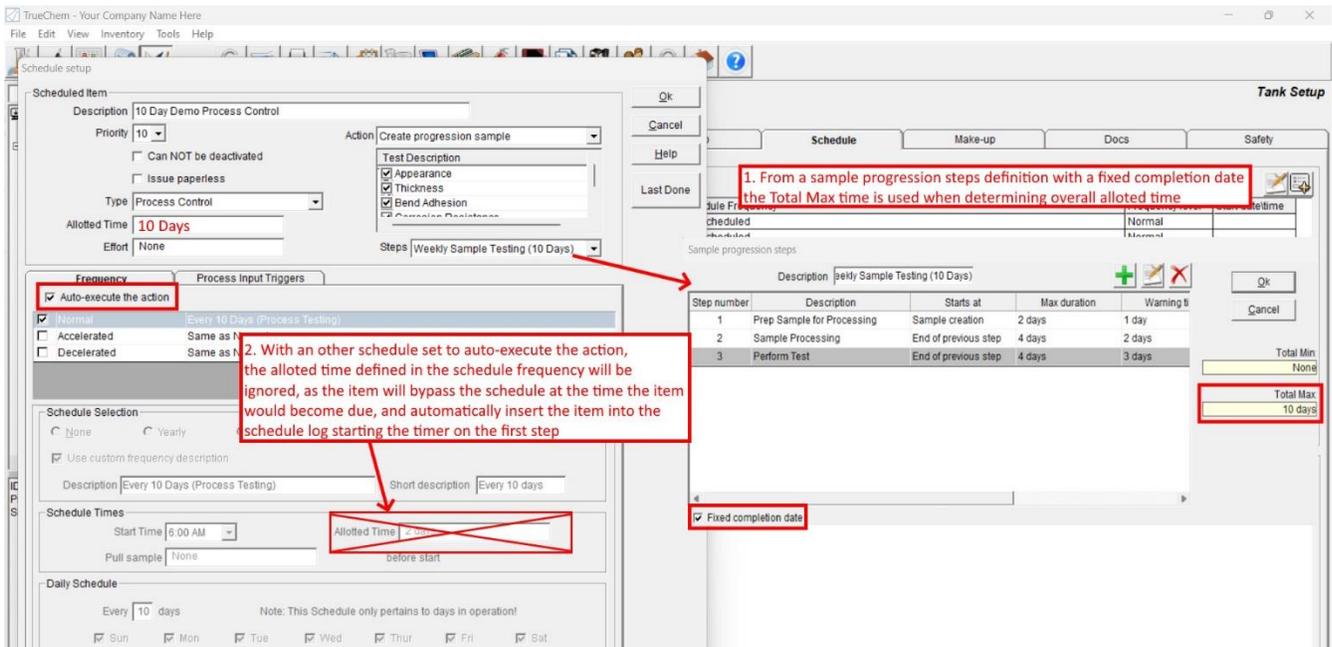


TrueChem: Sample Progression Steps



*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).

Example 1: 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.



View in Sample Log when Other Schedule Becomes Due:

Items with Auto-execute the action will appear in the Sample Log with the current step set to the first step in the progression, and a due date of the max duration of that step

To mark a step as complete and move to the next step, you can either double click on the sample, or highlight the sample then click the sample progression steps button

Sample progression steps

Steps	Description	Completed By	Completed Date
1	Prep Sample for Processing	Eileen Sellers	5/15/2024 3:43 PM
2	Sample Processing		
3	Perform Test		

Highlight the step then click "Complete" to populate the Completed By and Completed Date columns, then click "Ok" to save. Only one step can be marked as complete at a time.

As you work through the sample progression steps, the sample log will display the current step with that step's due by date.

If a sample has gone past the defined warning time (if any), but has not yet reached the max duration for the current step, the sample will display as yellow in the sample log. Once a sample has reached the max duration for the current step the sample will display as red. The sample will turn black once the step is marked as complete and the next step becomes active.

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.

The final step "Perform Test" will appear in the schedule log with Type: One time Re-Test and Due caused by: Sample progression steps

If the sample progression steps definition has a fixed completion date, the Due By date should match what was calculated by the fixed completion at the time the sample was created.
If the item does NOT have a fixed completion date, the Due By Date will be the date/time the item moved to the "perform test" step + the time set as the Max duration for the perform test step

TrueChem: Sample Progression Steps

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.

From a sample progression steps definition with a fixed completion date the Total Max time (28 days) is used when determining overall allotted time.

When the item is NOT set to Auto-execute the action, the total allotted time will equal the Total Max (28 Days) from the sample progression steps + the Allotted Time from the schedule frequency definition (2 Days). The fixed completion date (if selected) is calculated at the point the sample is created from the schedule log.

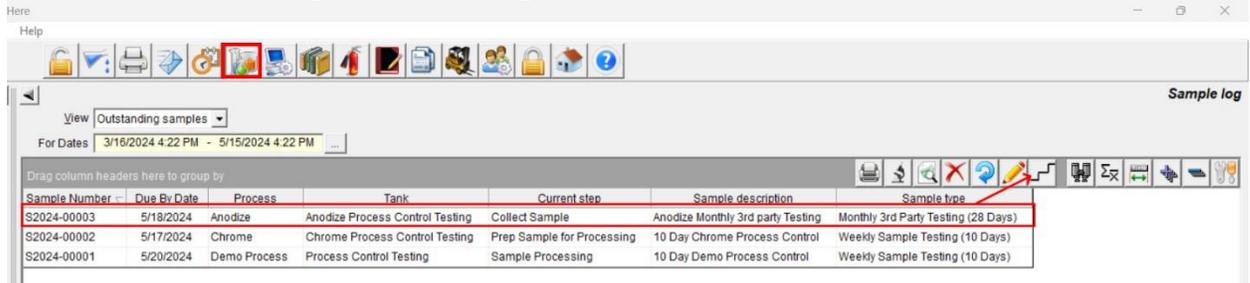
In this example, every month on the 15th, an item will appear in the schedule with a due date set to the allotted time of the schedule frequency (2 days). When you are ready to start the sample progression step timer, double click on the scheduled item or click the do now button. This creates a sample 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.

Other scheduled items that are NOT set to auto-execute the action appear in the schedule log, and have a Due By date = to the allotted time of the schedule frequency definition.

To create the sample and start the sample progression steps, a user needs to either double click on the item, or highlight the item and choose "Do Now".

TrueChem: Sample Progression Steps

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



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