New Test Method or Qualification

Background:

If a new test method has been created, several things must happen before it can be assigned to sample records:

1. Add to the Agency Views tab on the method's Test Summary (see *Add a test method with an agency view* Steps 4-7 below).
2. Add to one or more testing qualifications (see *Add a test method to a qualification* below).
3. Each person that will perform the test method must have a testing qualification that includes the new test method (see *Qualifications - Adding Sampling and Testing Quals to a Person* QRG).
4. Associate the new method with each material or material category upon which it will be used (see *Global Materials - Action Relationships* QRG).
5. Connect the new method and its associated material or material category with a destination lab and sample type (see *Global Materials - Test Assignment Information* QRG).

These steps need to be performed before adding the test method to the qualification. If you just want to view the test methods associated with the qualification, follow steps 1 through 3.

Roles:

Global Materials Admin, Materials Rover (view only), Materials Lab Admin (view only), Materials Lab Supervisor (view only), Material Statewide (view only)

Navigation:

Add a test method with an agency view:

Reference Data > Tests

1. On the Test Overview page, click the arrow in the upper right to open the Component Actions menu and click the **Add** link.
2. On the Add Test page, enter a **Test Method** and **Description**.
3. Click **Save**.
4. On the Test Summary page, select the **Agency Views** tab on the left.
5. Click the **Select Agency Views** button.
6. In the Select Agency Views window, use the search and filter fields to find the desired agency views, click on their rows to select them, and click the **Add to Test** button at the bottom of the page.
7. To activate the agency view, enter today's date in the **Effective Date** field, select ACTIVE in the **Status** dropdown, and click **Save** in the upper right corner.

Add a test method to a qualification:

NAVIGATION:

Reference Data > Qualifications >

1. On the Qualification Overview page, use the search and filter fields to find the qualification to which you are adding the test method, and click on its **Qualification ID** link.
2. On the Qualification Summary page, select the **Qualification Tests** tab on the left.
3. View all the test methods added to the Qualification here.

Add a test method (if you have editing abilities):
1. To add a new test method, click the **Select Tests** button.
2. In the Select Tests window, click on the row of the desired test, and click the **Add to Qualification Tests** button at the bottom of the page.

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3. In the Test Method row you have created, enter today's date in the **Effective Date** field and select ACTIVE in the **Status** dropdown.
4. Click **Save** in the upper right corner.

Inactivate a test method on a qualification:

1. In the Test Method row, select INACTIVE in the **Status** dropdown.
2. Click **Save** in the upper right corner.

Next Steps: