



QUICK REFERENCE GUIDE:

Adding Sources and Source Materials

Background:

A source must be active in the system with their source materials in order for the source to be selected on a Sample Record. If a source is not in the system, a sample is not able to be created.

Roles:

Materials Rover, Material Lab Supervisor, Material Lab Admin

*Role must have source authority to perform task

Navigation:

Reference Data or Materials Reference Data > Sources >

1. On the Source Overview page, search for the Material Source. Check for different spellings, etc.
 - a. If you found the Source – great. Click the **Source ID**. You can review the source, edit the information as needed or add source materials as needed, go to step 10.
 - b. If you do not find the Source, click the arrow in the upper right to open the Component Actions menu and click the **Add**.
2. On the Add Source page, enter the following:
 - a. **Source Name/Alias** – the name of the source
 - b. **Effective Date** - this date says when a source can be used. Make this date before the first sample date.
 - c. **Status - Active**
 - d. **Source Type** - select the source type if desired
3. Click **Save**.

4. On the Source Summary page, fill out any additional information that applies to the Source.
5. Click the **Addresses** tab on the left and enter in identifying location information for the source. Note: Address Type will be **Source Address**.
6. Click **Save**.

You can add sources two ways, see options below:

Option 1: To associate the material with a source:

7. On the Source Summary page, click **Materials** tab on the left.
8. Click the **Select Source Materials...** button.
9. In the Select Source Materials modal, use the search to find the desired materials, click on their rows to select them, and click the **Add to Source** button at the bottom of the page.
10. To activate the source material, choose a date in the **Effective Date** field and select ACTIVE in the **Status** dropdown.
11. Click **Save**.

Option 2: To copy a Source's Materials to another Source:

12. Navigate to the Source you want to copy from.
13. On the Source Summary page, click the **Materials** tab
14. Click the **Open Actions Menu** next to the Select Source Materials button.
15. Click **Copy Source Materials to Sources...**
16. In the Copy Source Materials to Sources modal, use the search to find the Source that should have the same Materials. Click on the row to select the source, and click the **Save** button at the bottom right.
17. Navigate to the Source you selected in the modal window and review the Materials that have been copied.

If you need further assistance please contact your Module Admin

Updated January 2023



QUICK REFERENCE GUIDE:

Adding Sources and Source Materials

Next Steps:

If a user was requesting a source or source material, communicate the task has been completed.

If you need further assistance please contact your Module Admin
Updated January 2023