

EDMS Field

User Guide



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EDMS Field

Version 4

User Guide

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EDMS Field

User Guide

Chapter 1 Introduction

Chapter 1 Introduction

The EDMS Field application is a separate program that can be run on tablets and laptops to collect data and then send this data remotely to the EDMS module of the GaeaSynergy application. The field data consists of sample and station information and is transmitted as Electronic Data Interchange (EDI) files to GaeaSynergy. To use EDMS Field with the EDMS module of GaeaSynergy, the network version of GaeaSynergy must be used.

A wide variety of environmental data can be collected by EDMS Field, including; soil, rock, groundwater, surface water, solids, fluids, air, biological, and meteorological data.

Benefits

- Scheduling of sampling tasks on a singular or recurring basis.
- Provide notifications of sample collection and lab analysis submittal events.
- Collection and exporting of extensive environmental data,
- Standardize the procedures for data collection within and across projects,
- Reduce the time and effort required for data handling and reporting,
- Provide a secure database system for the storage, retrieval, and backup of all project environmental data.
- Fully integrated with the EDMS module within GaeaSynergy.

1.1 Overview

EDMS and EDMS Field are used to improve and standardize environmental data collection, management, and reporting in an efficient and cost-effective manner. This is accomplished by implementing a documented, auditable process for the collection, storage, and reporting of environmental field data. Throughout this process all stages of the sampling and analysis are tracked and notifications can be sent via email or SMS (text message). Notifications for non-compliance events and sample exceedences can be automatically sent by the system.

This process can be divided into four stages:

1. Scheduling and Sample Planning

The first stage in any environmental field program is the scheduling and planning of sampling events. EDMS allows project managers to design, delegate, and monitor sampling events. Sampling events can be either singular or re-occurring. Prior to data collection, sampling stations can be specified in either EDMS or EDMS Field. These sample stations include information on station location and construction, sampling defaults and methodology, lab analyses required, required equipment and personnel. Sample labels with barcodes and a Chain of Custody (COC) can be printed from the stations to be used in data collection and lab submittal.

2. Data Collection

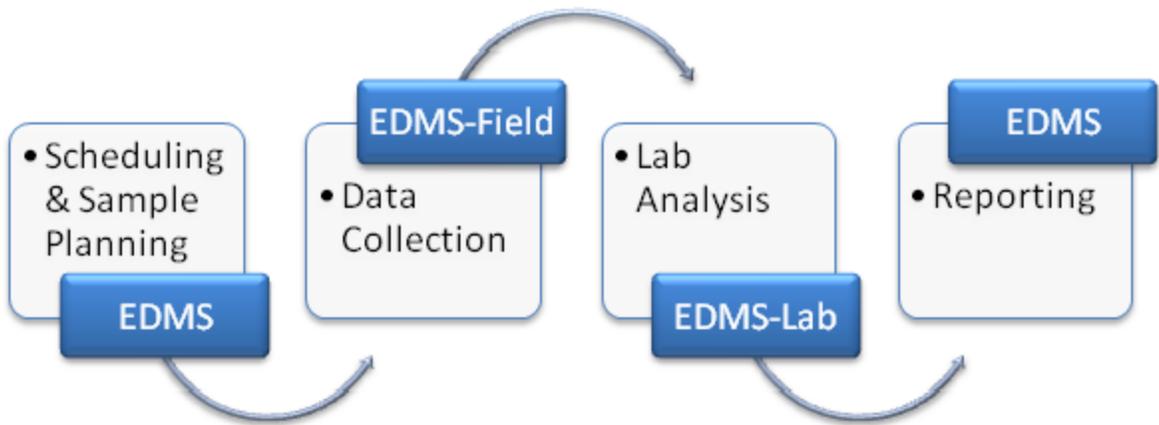
When a sampling event occurs all of the station information is inherited by the sample including sampling defaults, required lab analyses, and personnel. Detailed sample information can be recorded for each environmental media on a Windows laptop or tablet using EDMS Field or a field notebook (for later data entry). Sample photographs can also be included with the sample data. Sample data collected using EDMS Field can be uploaded to the network main database remotely as an Electronic Data Interchange (EDI) file. The remote uploading of data using an EDI provides for faster more comprehensive data reporting and reduces the possibility of transcription errors.

3. Lab Analysis

Samples submitted for lab analysis are tracked during shipping, receiving, lab analysis, and reporting process. This tracking is reported on by EDMS and EDMS Lab (free lab reporting software provided by GAEA). Analytical labs using EDMS Lab can upload analysis results to the main database remotely as an EDI file. The electronic reporting of lab data reduces the effort and possibly of errors of manual data entry. A Certificate of Analysis (COA) can be included in the EDI and a copy stored in the main database.

4. Reporting

Sample and lab analysis results can be collated and reported on in a variety of tables and graphs. These tables and graphs can be easily customized to meet internal and external needs. In addition, EDMS data is fully integrated and available for use by other modules within GaeaSynergy. Sample and lab analysis data can be viewed and used in the WinLoG, SE-GIS, and SE-Map modules.



1.1.1 Electronic Data Interchange

Electronic Data Interchange (EDI) files are used to exchange data between the EDMS module, EDMS Field, and EDMS Lab. All EDI files are stored in XML format and are transferred either by email or FTP. The email and FTP settings are specified in the [program preferences](#)^[24]. These EDI files are automatically imported by the receiving application when that application is started.

EDI Type	Originator	Receiver
Sampling Task Data	EDMS	EDMS Field
Project Data	EDMS Field	EDMS
Station Data	EDMS Field	EDMS
Sample Data	EDMS Field	EDMS
Lab Analysis Data	EDMS Lab	EDMS

1.1.2 Notifications

Notifications can be sent throughout the work process. These notifications can only be setup in [tasks](#) and can only be used when tasks are used to control the work flow.

Notification	Originator
Sample required	EDMS
Sample collected*	EDMS Field
Sample not collected (non-compliant)	EDMS
Sample shipped to lab*	EDMS Field
Sample received by lab*	EDMS Lab
Lab analysis complete*	EDMS Lab
Lab analysis received	EDMS
Parameter exceedence (non-compliant)	EDMS
Sample stored by lab	EDMS Lab
Sample disposed by lab	EDMS Lab

*These notifications can also be generated from the EDMS module.

Notifications can be sent via email, SMS (text message), or internal notification within the program. When being sent using email the email address specified for the personnel is used, If they are being notified using SMS the cell number and country code for the personnel is used. And if the method is internal notification, the personnel will be notified the next time they login to the GaeaSynergy program.

1.2 Installation

When installing EDMS Field you must be logged in as an administrator.

The following steps occur during the installation:

- The application is installed on your computer
- Files for the databases and data store are copied to your computer
- Shortcuts are placed on your Start menu and desktop

1.3 Registration

Until the program is registered it will operate in demo mode.. The registration codes are based on a serial number that is unique for each computer. To register the program select Help > Register and the Register form will be displayed.

Register

Obtain Export Import Store

Module Name: EDMS Field
Module Version: 3.00

To register the module and obtain a registration code, enter your invoice number then click the obtain registration code button. This will display a registration form on GAEA's website. Fill in the information on the form and then submit it.

Invoice Number:

If you are unable to access the internet, please call us at (613) 900-1950.

Serial Number
EF3-2224-1167-8542-7647

Registration Code

Close Help

This form shows the unique serial number for the computer, to generate your registration code GAEA requires this unique serial number. The buttons at the top of the form can be used for the following:

Obtain: When this button is clicked you will be directed to a web page where your company information and the serial number can be entered and then sent to GAEA. Once GAEA received this information you will be sent a registration file that can be imported using the Import button.

Export: When this button is pressed an [Export Serial Numbers](#)¹⁷ form will be displayed where your company information can be entered. After the information is entered it can be emailed to GAEA or exported to a file that can be later emailed to GAEA. Once GAEA received this information you will be sent a registration file that can be imported using the Import button.

Import: This button is used to import a registration file after it has been received from GAEA. This file will contain the invoice number and registration code.

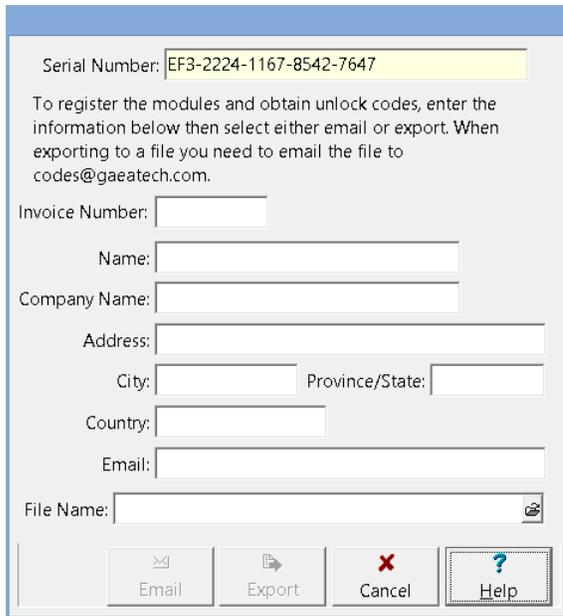
Store: This button is used to save the registration information.

In addition to using the buttons to obtain the registration information, it can also be entered directly using the Invoice Number and Registration Code fields.

After the program is licensed, the license can be transferred to another computer using the [Transfer Registration](#) procedure.

1.3.1 Export Serial Numbers

When the Export button on the Register form is pressed, the Export Serial Numbers form is displayed.



Serial Number: EF3-2224-1167-8542-7647

To register the modules and obtain unlock codes, enter the information below then select either email or export. When exporting to a file you need to email the file to codes@gaeatech.com.

Invoice Number:

Name:

Company Name:

Address:

City: Province/State:

Country:

Email:

File Name:

Email Export Cancel Help

The following information can be entered on this form:

Invoice Number: This is the invoice number provided by GAEA when the program was purchased.

Name: This is the licensed user's name.

Company Name: This is the licensed company's name.

Address: This is the company's street address.

City: This is the company's city.

Province/State: This is the company's state or province.

Country: This is the company's country.

Email: This is the your email address/

File Name: This is used to specify the file name to store the information. It must be specified for the Email or Export buttons to be enabled.

After all of the information is entered it can be emailed to GAEA using the Email button or exported to a file that can be later emailed to GAEA using the Export button. Once GAEA received this information you will be sent a registration file that can be imported using the Import button.

1.3.2 Transferring the Registration

If you need to transfer the license from one computer to another the program must first be locked on the licensed computer before a new registration code can be sent. To do this follow the steps below.

On the licensed computer

Select the [Help > Relock](#), the Relock form will be displayed showing a relock code, email the relock code to GAEA at codes@gaeatech.com

Relock

In order to transfer the registration to a different computer, you must first relock it. Relocking a module reverts it to an unregistered state.

This process generates a relock code that you need to send to GAEA Technologies to confirm your eligibility for a new unlock code.

Details

Module Name:	EDMS Field
Module Version:	3.00
Licensed On:	6/18/2015 10:29:26 AM

Relock code:

Invoice #:

Name:

Company Name:

Address:

City: Province/State:

Country:

Email:

File Name:

Automatically email relock file to GAEA

The following information can be entered on this form:

Name: This is the licensed user's name.

Company Name: This is the licensed company's name.

Address: This is the company's street address.

City: This is the company's city.

Province/State: This is the company's state or province.

Country: This is the company's country.

Email: This is the your email address/

File Name: This is used to specify the file name to store the information. It must be specified for the Relock button to be enabled.

Either check the automatic email option or email this file manually to GAEA>

On the new computer

Export the serial number and email this information to GAEA as described in the [Registration](#)¹⁵ section. After GAEA receives and processes the relock code and new serial numbers you will be sent a registration file that can be imported as described in the [Registration](#)¹⁵ section.

1.4 Using the Program

In this User's Guide menu items and paths have been abbreviated to make it easier to understand. All menu items are shown in *blue italics* and start with the uppermost menu then an arrow to the next menu or menu item. For example, the Project menu item of the Open submenu of the File menu is abbreviated as *File > Open > Project*.

A popup menu can also be displayed by clicking the right mouse button, the menu items in the popup menu will vary depending on what is being displayed and where on the screen the mouse is clicked. In this manual menu items that can be obtained from the popup menu are shown as *Popup > menu item*.

Gestures

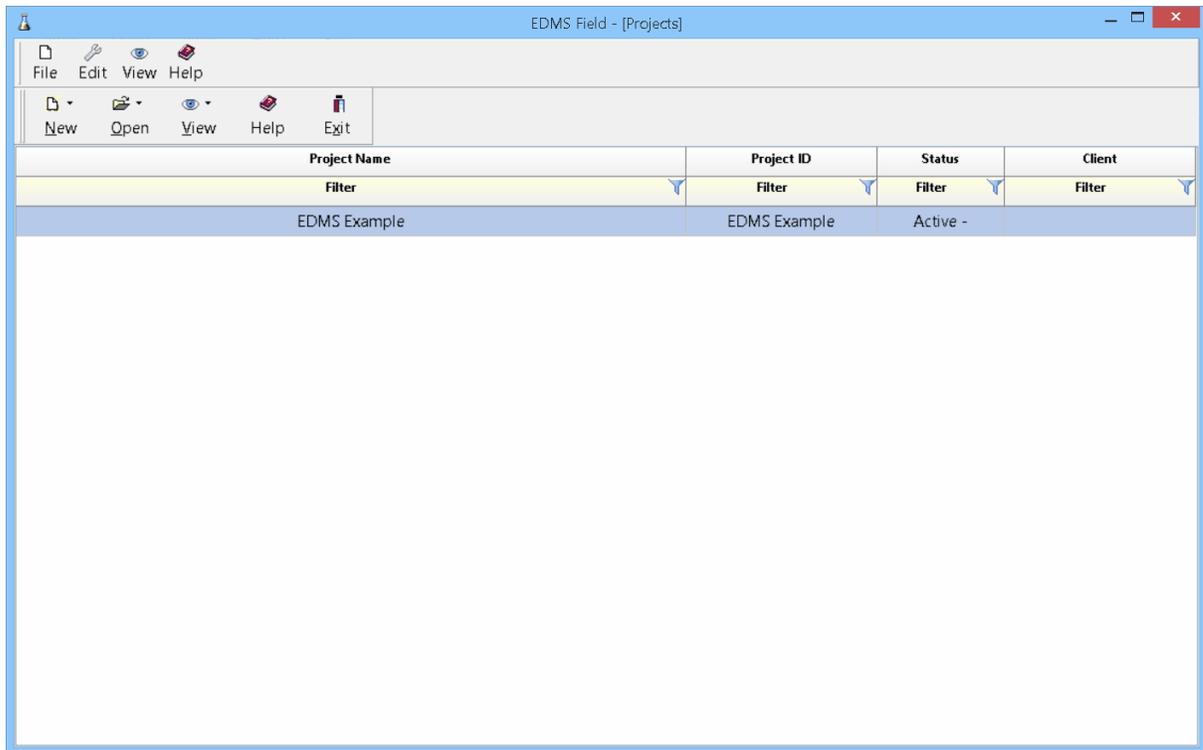
Many of the forms can use gestures (touch motions) for data input and program control. Unless otherwise specified the following gestures can be used on most forms.

- ✓ Can be used for Save or Ok on forms.
-) Can be used for Close or Cancel on forms.
- ^ Copies selected text to clipboard.
- ∨ Cuts selected text to clipboard.
- < Deletes selected text.
- > Pastes text from clipboard.
- Swipe from left to right to go to previous tab.
- ← Swipe from right to left to go to next tab.

Initial Display

The initial display will consist of a list of projects. The columns to be displayed can be changed by right clicking on the first header row. A popup menu will be displayed showing all of the columns that can be displayed. Check the box next to the columns to display in the list. In addition, the data to be displayed in the list can be filtered by clicking on the filter symbol at the top of the column and selecting the type of filter. The Filter Entry Form can then be used to specify a filter as described in the [Filter Entry](#)^[23] section below.

If the option to open the last project has been selected in [program preferences](#)^[24], the initial display will show the last opened project.



The screenshot shows a software window titled "EDMS Field - [Projects]". It features a menu bar with "File", "Edit", "View", and "Help". Below the menu bar is a toolbar with icons for "New", "Open", "View", "Help", and "Exit". The main area contains a table with the following structure:

Project Name	Project ID	Status	Client
Filter	Filter	Filter	Filter
EDMS Example	EDMS Example	Active -	

This initial view can be changed to show a list of tasks by selecting [View > Tasks](#).

EDMS Field - [Tasks]

File Edit View Help

New Open View Help Exit

Task List Show Current Tasks Only

Project	Name	Description	Priority	Status	Recurring	Media Type
Boring and Well	task7		Urgent	Sample	No	Groundwater
Boring and Well Examp	Sampling 1	During sample colle	Urgent	Non-compliant	Yes	Groundwater

Schedule: June 18 - 24, 2015

	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday
6 ⁰⁰		Reoccurring					
7 ⁰⁰							
8 ⁰⁰							
9 ⁰⁰							
10 ⁰⁰							
11 ⁰⁰							
12 ⁰⁰							

Jun 2015

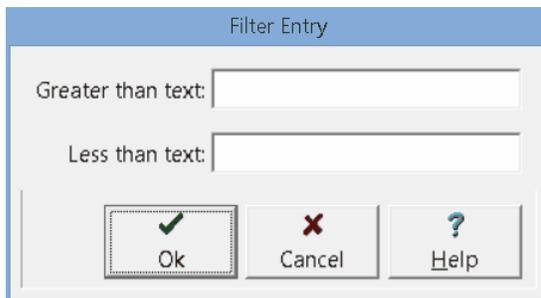
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

The following gestures can be used on these forms:

- S To show the tasks.
- P To show the projects.

1.4.1 Filter Entry

The Filter Entry form is used to specify a filter for the view list.



The image shows a dialog box titled "Filter Entry". It contains two text input fields. The first field is labeled "Greater than text:" and the second is labeled "Less than text:". Below the input fields are three buttons: "Ok" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a blue question mark icon).

This form will have one or two fields to enter the filter depending on the type of filter selected.

1.5 Program Preferences

To set the preferences select *File > Preferences*. The Preferences form will be displayed.

The screenshot shows the 'Preferences' dialog box with four tabs: 'Basic', 'Internet', 'Tasks', and 'Contact Info'. The 'Basic' tab is selected. The dialog is divided into three sections: 'Directories', 'Defaults', and 'Options'.
- **Directories:** 'Database' is set to 'C:\ProgramData\GAEA\EDMS-Field\Databases', 'Password' is empty, and 'Datastore' is set to 'C:\ProgramData\GAEA\EDMS-Field\Datastore'.
- **Defaults:** 'Lab' is 'ALS Environmental, Pooraka', 'COC' is empty, 'Label' is 'Letter', 'Form' is '4x1.33 in', 'Local Units' is 'Meters', and 'Location Precision' is '4'.
- **Options:** 'Open last project' is unchecked, and 'Display new object prompts' is checked.
At the bottom are 'Ok', 'Cancel', and 'Help' buttons.

This form has four tabs for Basic, Internet, Tasks, and Company Info, These tabs are described in the sections below.

1.5.1 Basic Tab

The Basic tab is used to specify directories, defaults and program options.

The screenshot shows the 'Preferences' dialog box with the 'Basic' tab selected. The dialog has four tabs: 'Basic', 'Internet', 'Tasks', and 'Contact Info'. The 'Basic' tab is active and contains three sections: 'Directories', 'Defaults', and 'Options'.
- The 'Directories' section has three text boxes: 'Database' (C:\ProgramData\GAEA\EDMS-Field\Databases), 'Password' (empty), and 'Datastore' (C:\ProgramData\GAEA\EDMS-Field\Datastore). Each has a folder icon to its right.
- The 'Defaults' section has five dropdown menus: 'Lab' (ALS Environmental, Pooraka), 'COC' (empty), 'Label' (Letter), 'Form' (4x1.33 in), and 'Local Units' (Meters). There is also a 'Location Precision' text box with the value '4'.
- The 'Options' section has two checkboxes: 'Open last project' (unchecked) and 'Display new object prompts' (checked).
At the bottom of the dialog are three buttons: 'Ok' (with a green checkmark icon), 'Cancel' (with a red X icon), and 'Help' (with a blue question mark icon).

The following can be specified on this tab:

Directories

Database: This is the location of the main database for the program.

Password: This is the password for the main database. Normally it is blank.

Datastore: This is the location of the datastore folder.

Defaults

Lab: This is used to select the default lab when specifying a lab analysis to be conducted.

COC: This is used to select the default Chain Of Custody to be used when creating a COC.

Label: This is used to select the default label size when creating sample labels.

Form: This is used to select the default form when creating sample labels. The default forms that can be selected will change depending on the default label selected.

Local Units: This is used to select the default local units when creating a project.

Location Precision: This is used to specify the precision to use when specifying x and y coordinates.

Options

Open last project: Check this box to open the last project when the program is started.

Display new object prompts: Check this box to display information prompts when creating new samples and stations.

1.5.2 Internet Tab

The Internet tab is used to specify the email and FTP settings for Internet access.

The screenshot shows the 'Preferences' dialog box with the 'Internet' tab selected. The dialog is organized into three main sections:

- Incoming Email Settings:** Includes fields for Host, Port (set to 110), Username, and Password. A checkbox for 'Use TLS / SSL' is present and unchecked. A 'Test Settings' button with a globe icon is located to the right.
- Outgoing Email Settings:** Includes fields for Host, Port (set to 26), Username, and Password. A checkbox for 'Use TLS / SSL' is present and unchecked. A 'Test Settings' button with a globe icon is located to the right.
- Service Settings:** Includes fields for Email, FTP Server, User Name, and Password. A Port field is set to 21. A 'Test Settings' button with a globe icon is located to the right.

At the bottom of the dialog are three buttons: 'Ok' (with a checkmark icon), 'Cancel' (with an 'X' icon), and 'Help' (with a question mark icon).

The following can be specified on this tab:

Incoming Email Settings

Host: This is mail server for incoming EDI files and notification emails.

Port: This is the port for the incoming server.

Use TLS/SSL: Check this box if the incoming server requires TLS/SSL.

Username: This is the username for the incoming server.

Password: This is the password for the incoming server.

Test Settings: Click this button to test the settings for incoming email.

Outgoing Email Settings

Host: This is mail server for outgoing EDI files and notification emails.

Port: This is the port for the outgoing server.

Use TLS/SSL: Check this box if the outgoing server requires TLS/SSL.

Username: This is the username for the outgoing server.

Password: This is the password for the outgoing server.

Test Settings: Click this button to test the settings for outgoing email.

Service Settings

Email: This is the email address to use for the GaeaSynergy service.

FTP Server: This is FTP server for outgoing and incoming EDI files and notifications.

Port: This is the port for the FTP server.

Username: This is the username for the FTP server.

Password: This is the password for the FTP server.

Test Settings: Click this button to test the settings for FTP.

1.5.3 Tasks Tab

The Tasks tab is used to specify task options.

The screenshot shows the 'Preferences' dialog box with the 'Tasks' tab selected. The dialog has four tabs: 'Basic', 'Internet', 'Tasks', and 'Contact Info'. The 'Tasks' tab contains the following settings:

- Task Timer Interval (mins):** A spinner box set to 1.
- Show Tasks on Startup:** An unchecked checkbox.
- Show Task Schedule:** A checked checkbox.
- Schedule Start Time:** A spinner box set to 6.
- Schedule End Time:** A spinner box set to 20.
- Active Start Time:** A spinner box set to 8.
- Active End Time:** A spinner box set to 18.
- Non-compliant:** A button next to a pink rectangular color swatch.

At the bottom of the dialog are three buttons: 'Ok' (with a green checkmark), 'Cancel' (with a red X), and 'Help' (with a blue question mark).

The following can be specified on this tab:

Task Timer Interval: This is the interval in minutes used to retrieve tasks by email and FTP.

Show Tasks on Startup: When this box is checked the initial display when the program is started will be a list of tasks.

Show Task Schedule: Check this box to show the task schedule below the list of tasks.

Schedule Start Time: This is the start time for the schedule.

Schedule End Time: This is the end time for the schedule.

Active Start Time: This is the start time of the time interval to highlight as active in the schedule.

Active End Time: This is the end time of the time interval to highlight as active in the schedule.

Non-compliant: Click this box to select the color to use to highlight non-compliant tasks.

1.5.4 Contact Info Tab

The Contact Info tab is used to specify contact information used for EDI and creating sample labels and COCs.

Preferences

Basic | Internet | Tasks | Contact Info

Username: admin

Personnel ID: 101

Contact Information

Contact Name:

Company:

Phone Number: Country Code: 1 Select

Fax Number:

Email:

Street 1:

Street 2:

City:

State:

Country:

Postal Code:

Ok Cancel Help

The following can be specified on this tab:

Username: This is the user name for sending and receiving data using the EDI. It is assigned in the main GaeaSynergy program.

Personnel ID: This is the personnel ID for sending and receiving data using the EDI. It is assigned in the main GaeaSynergy program.

Contact Name: This is the contact person.

Company: This is the name of the company.

Phone Number: This is the phone number for the contact person.

Country Code: This is the country calling code for the contact person. It can be selected by clicking on the Select button..

Fax Number: This is the fax number for the contact person.

Email: This is the email address of the contact person.

Street 1: This is the first line for the street address of the company.

Street 2: This is the second line for the street address.

City: This is the company' city.

State: This is the state or province of the company.

Country: This is the country of the company.

Postal Code: This is the postal or zip code for the company.

1.6 Lookup List Data

Lookup list data is used to control and simplify the data entry in EDMS Field. These lists of predefined data can be imported and then used when creating stations and samples. The lookup list data is created in the EDMS module of GaeaSynergy and then exported either to an XML file, the FTP site, or sent by email.

XML

After the data has been exported it can be imported into EDMS Field by selecting *File > Import > Lookup List Data > From XML*. You will then be prompted to specify the name of the XML file.

FTP

To import the data from the FTP site select *File > Import > Lookup List Data > From FTP*. It will then automatically find and download the file from the FTP site.

Email

If the data was sent from the EDMS module by email, it will automatically be imported when the EDMS Field application is started.

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Chapter 2 Tasks

Chapter 2 Tasks

EDMS Field can automatically receive sampling tasks from the EDMS module via email or FTP. To use this feature of the EDMS module, the network version must be installed and the EDMS Service running. In addition, the task can be imported manually from an XML file.

The tasks can only be created and edited in the EDMS module. EDMS Field is only able to view the tasks and add stations and samples to them.

These tasks can be displayed on a dashboard showing a list of tasks and a weekly calendar of tasks. Each task can contain one or more stations or samples. Stations are used to locate positions where multiple samples will be taken, normally for reoccurring events.

Sampling defaults and required lab analyses can be set in the task and then passed down automatically to stations and samples in the task.

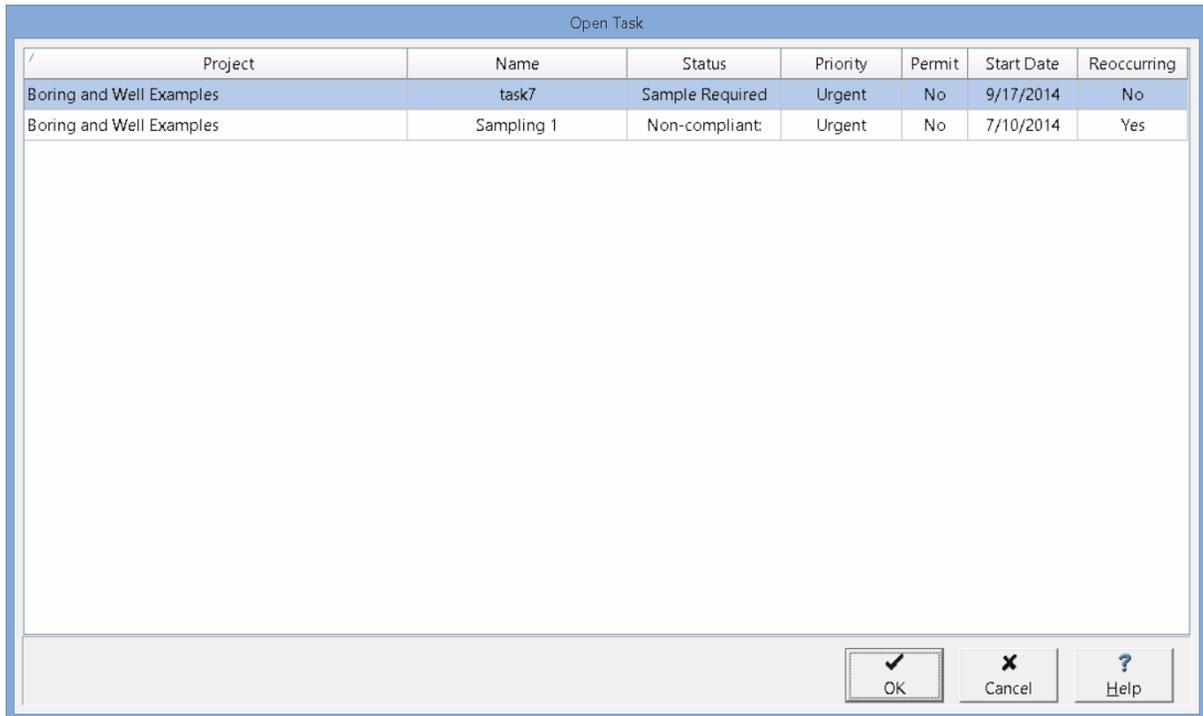
Notifications can be sent throughout the work process via email, SMS (text message), or internal notification within the program. These notifications can only be setup in tasks. The following notifications are processed by EDMS field:

- Sample collected
- Sample shipped to lab

The Sample Required notification is processed and sent by the EDMS module at the same time as the task data is sent to EDMS Field.

2.1 Opening a Task

An existing task can be opened using the Task View described in the Viewing Tasks. It can also be selected from a list of tasks by selecting [File > Open > Task](#) or clicking on the Open button on the main toolbar and selecting [Task](#). A list of tasks will then be displayed on the Open Task form.



The screenshot shows a dialog box titled "Open Task" with a table of tasks. The table has seven columns: Project, Name, Status, Priority, Permit, Start Date, and Reoccurring. Two rows are visible in the table.

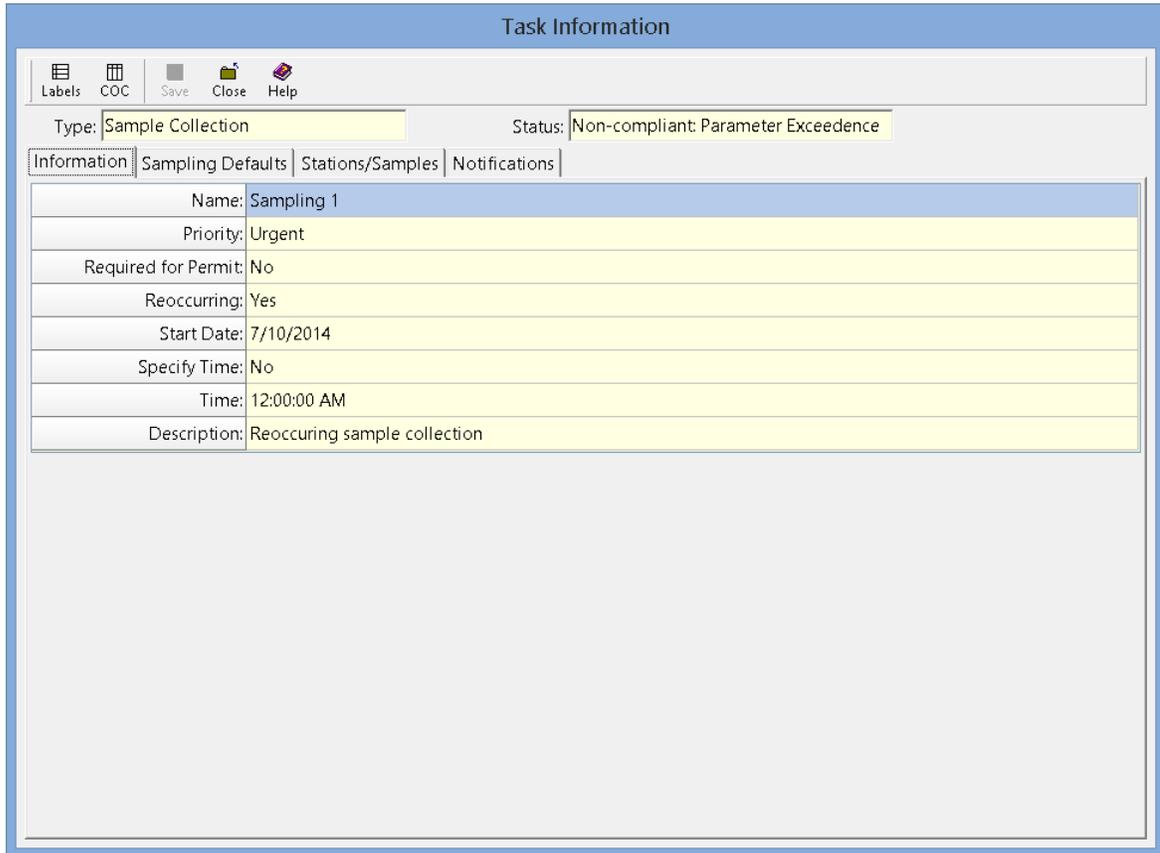
Project	Name	Status	Priority	Permit	Start Date	Reoccurring
Boring and Well Examples	task7	Sample Required	Urgent	No	9/17/2014	No
Boring and Well Examples	Sampling 1	Non-compliant	Urgent	No	7/10/2014	Yes

At the bottom right of the dialog box, there are three buttons: "OK" (with a checkmark icon), "Cancel" (with an 'X' icon), and "Help" (with a question mark icon).

A task can be selected on this form by double-clicking on it or by highlighting and pressing the Ok button. If you have access rights to the task, the selected task will then be displayed in the Task Information from and can be edited as described in the [Displaying a Task](#)³⁷ section.

2.2 Displaying a Task

After a task has been imported from EDMS it can be displayed using the Task Information form. At the top of the form, below the toolbar, the type of task and status are shown. The status of the task initially "In-Progress" and then is updated automatically by the program during the work flow process, If a project is open the form will have four tabs for Information, Sampling Defaults, Stations/Samples, and Notifications. If no project is open, the Stations/Samples tab will not be shown.



The screenshot shows the 'Task Information' form. At the top, there is a toolbar with icons for Labels, COC, Save, Close, and Help. Below the toolbar, the 'Type' is 'Sample Collection' and the 'Status' is 'Non-compliant: Parameter Exceedence'. There are four tabs: 'Information', 'Sampling Defaults', 'Stations/Samples', and 'Notifications'. The 'Information' tab is active, displaying the following details:

Name:	Sampling 1
Priority:	Urgent
Required for Permit:	No
Reoccurring:	Yes
Start Date:	7/10/2014
Specify Time:	No
Time:	12:00:00 AM
Description:	Reoccurring sample collection

The toolbar buttons are for the following:

Labels: Click to print sample labels as described in the section [Printing Sample Labels](#) ⁴⁷.

COC: Click to print a Chain of Custody as described in the section [Printing a Chain of Custody](#) ⁴⁹.

Save: This is used to save any changes made on the Stations/Samples tab.

Close: Click this to close the form.

Help: Click this to display help on using the form.

2.2.1 Information Tab

The Information tab is used to display the general information for the task.

Task Information	
Type:	Sample Collection
Status:	Non-compliant: Parameter Exceedence
Information Sampling Defaults Stations/Samples Notifications	
Name:	Sampling 1
Priority:	Urgent
Required for Permit:	No
Reoccurring:	Yes
Start Date:	7/10/2014
Specify Time:	No
Time:	12:00:00 AM
Description:	Reoccurring sample collection

The following information can be displayed on this tab:

Name: This is the name to be used for the task.

Priority: This is the priority of the task, The priority can be either Urgent, High, Average, or Low.

Required for Permit: Yes, if this task is required to maintain a permit for he project.

Reoccurring: Yes, if the sampling must be performed on a reoccurring basis. .

Start Date: This is the start date of a reoccurring task or the date to conduct a non-reoccurring task.

Specify Time: Yes, if a time of day to carry out the task is specified.

Time: This is the time to conduct the task if a time is being specified.

Description: This is a description of the task.

2.2.2 Sampling Defaults Tab

The Sampling Defaults tab is used to display the type of sampling, lab analysis, personnel, and equipment required for the task.

Task Information

Labels
COC
Save
Close
Help

Type:
Status:

Information
Sampling Defaults
Stations/Samples
Notifications

Media/Matrix Type:	Groundwater
Sub-media Type:	
Collection Method:	Bailer
Variations:	
Methodology:	D1586-11
Laboratory:	ALS, Springvale

Lab Analyses:

Parameters	Seq #	Container	Size	Units	Preservative
BTEX	1	Clear glass	40	mL	Cool, 4°C, Na2HSO4 to

Personnel

First Name	Last Name
William	Tell
Mike	Fraser

Equipment:

Name	Quantity
Hand Auger	1
Soil Moisture Sensor	1

The following information can be displayed on his tab:

Media/Matrix Type: This is the media or matrix to be sampled. It can be Soil, Groundwater, Surface Water, Roc, Solid, Fluid, Biological, Air, or Other.

Sub-media Type: If the media/matrix type is Fluid, Solid, or Other the sub-media type can be specified.

Collection Method: This is the collection method to be used to collect the sample.

Variations: This is any variations from normal sampling procedures.

Methodology: This is used to display the sampling methodology.

Laboratory: This is used to display the laboratory to use for lab analyses.

Lab Analyses: This is a list of lab analyses to be conducted on the sample.

Personnel: This is a list of personnel required to conduct the sampling.

Equipment: This is a list of equipment required to conduct the sampling. of equipment can also be specified.

2.2.3 Stations and Samples Tab

The Stations/Samples tab is used to list and associate all of the stations and samples connected to the task.

Task Information

Labels
COC
Save
Close
Help

Type: Sample Collection
Status: Non-compliant: Parameter Exceedence

Information
Sampling Defaults
Stations/Samples
Notifications

	Name	X-Coordinate	Y-Coordinate	Media Type
/	stn5	100	200	Other
	station1	200	300	Other
	stn1	1508.7108	1362.3693	Groundwater
	sdd2	1518.9873	1054.8523	Groundwater

Name	Station	X-Coord.	Y-Coord.	Media Type	Date

Stations

Create

Link

Open

Unlink

Populate

Samples

Create

Link

Open

Unlink

Station List

Stations are used to specify the location of current and future sampling. The list of stations displays the name, x and y coordinates, and media type for the station. The buttons beside the list perform the following functions:

Create: This creates a new station for the task. When pressed the project map will be displayed where the location of the station can be specified, then the Station Information form will be displayed. The data for the station can be entered on this form as described in the [Editing a Station](#)⁷⁵ section. The default sample information and access rights on the form will be filled in automatically using the defaults from the task.

Open: This will open the selected station for editing as described in the [Editing a Station](#)⁷⁵ section.

Link: This will display a list of existing stations, from which a station can be selected to add to the task. Any samples associated with the station will also be added to the sample list.

Unlink: This will remove the selected station from the list of stations for the task. It will not delete the selected station. Any samples associated with the station will also be removed from the sample list.

Populate: This will display the Populate Samples form to populate the list of stations with samples for the current task date as described in the [Populate Samples](#)^[42] section below. If it is a reoccurring task the sampling date will be the next upcoming date for sample collection.

Samples List

The samples list displays all of the samples that have been collected to date for the task. This list displays the sample name, station name (if there is one), x and y coordinates, media type, and date collected for each sample. The buttons beside the list perform the following functions:

Create: This creates a new sample for the task. When pressed the project map will be displayed where the location of the sample can be specified, then the Sample Information form will be displayed. The data for the sample can be entered on this form as described in the [Editing a Sample](#)^[92] section. The default sample information, personnel, lab analyses and access rights on the form will be filled in automatically using the defaults from the task.

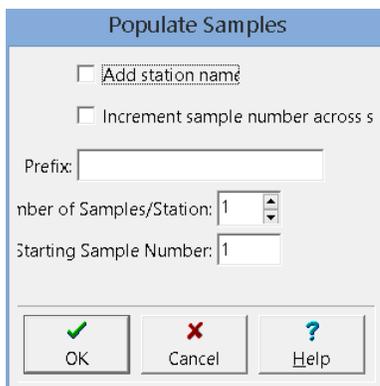
Open: This will open the selected sample for editing as described in the [Editing a Sample](#)^[92] section.

Link: This will display a list of existing samples, from which a sample can be selected to add to the task.

Unlink: This will remove the selected sample from the list of samples for the task. It will not delete the selected sample.

2.2.3.1 Populate Samples

The Populate Samples form is used to populate the list of stations with samples for the current task date. If it is a reoccurring task the sampling date will be the next upcoming date for sample collection.



The following can be entered on this form:

Add Station Name: If this box is checked the name of the sample will start with the station name. When this box is checked the Prefix will contain "[Stn]" to represent where the station name will be placed.

Increment sample number across stations: If checked the sample number will increase across stations, otherwise it will start again with each station.

Prefix: This is the text to appear at the beginning of each sample name. The sample name is comprised of the prefix followed by the sample number. If the station name is being added to the sample number, the prefix can contain text before or after the station name.

Number of Samples/Station: This is the number of samples to generate for each station.

Starting Sample Number: This is the starting sample number.

2.2.4 Notifications Tab

This tab is used to display the notification events associated with the task.

Task Information

Labels
COC
Save
Close
Help

Type: Sample Collection
Status: Non-compliant: Parameter Exceedence

Information
Sampling Defaults
Stations/Samples
Notifications

Event /	Personnel	Timing	Method
Non-compliant: Sample Not Collected	Mike, Fraser	0 days after	Email
Sample Disposed	Mike, Fraser	0 days after	Email
Lab Analysis Complete	Mike, Fraser	0 days after	Email
Lab Analysis Received	Mike, Fraser	0 days after	Email
Non-compliant: Parameter Exceedence	Mike, Fraser	0 days after	Email
Sample Collected	Mike, Fraser	0 days after	Email
Sample Required	Mike, Fraser	9 days before	Email
Shipped to Lab	Mike, Fraser	0 days after	Email
Received by Lab	Mike, Fraser	0 days after	Email
Sample Stored	Mike, Fraser	0 days after	Email

2.3 Deleting a Task

An existing task can be deleted by selecting *File > Delete > Task*. A list of tasks will then be displayed on the Delete Task form. A task can be selected on this form by double-clicking on it or by highlighting and pressing the OK button. If you have access rights to the task, the selected task will then be deleted.

Select Task to Delete

Project	Name	Status	Priority	Permit	Start Date	Reoccurring
Boring and Well Examples	task7	Sample Required	Urgent	No	9/17/2014	No
Boring and Well Examples	Sampling 1	Non-compliant:	Urgent	No	7/10/2014	Yes

OK Cancel Help

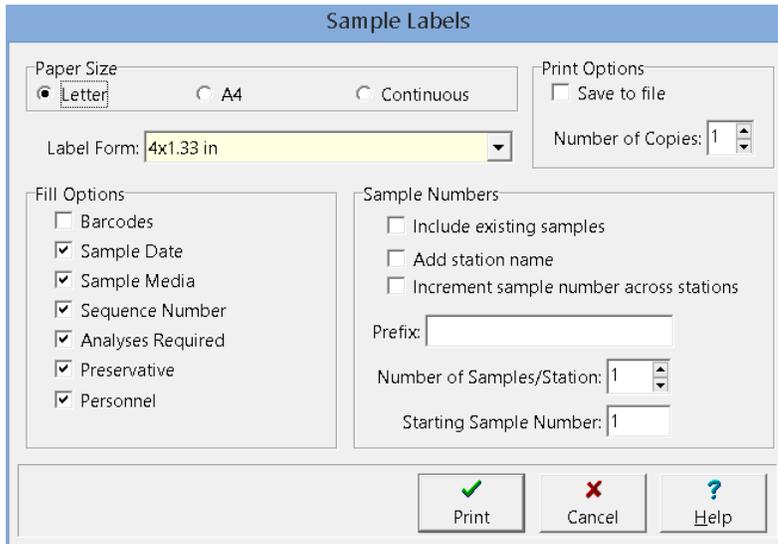
In addition, all completed tasks can be deleted by selecting *File > Delete > Completed Tasks*. This will delete all tasks that have had samples collected.

2.4 Importing a Task

In addition to having the tasks imported automatically by email or FTP, they can be imported manually from an XML file. To import a task select [File > Import > Task > From XML File](#). The name of the file can then be specified and the task will be imported.

2.5 Printing Sample Labels

Sample labels can be printed or saved to a file for a task or station. If they are being printed from a task, they will include all of the stations for the task. If the station or task has multiple lab analyses, one label will be generated for each analysis.



The following can be specified on this form:

Paper Size: This is the size of paper to use for the labels. It can be letter, A4, or continuous.

Label Form: This is the size of the individual label. The choices will change depending on the paper size.

Barcodes: Check to include a barcode on the label. The 2D barcode will include all of the sample information on the label and can be later scanned by the lab instead of entering this information manually.

Sample Date: Check to include the sample date on the label. This will be the next upcoming sample date for a reoccurring task or the task date for a non-reoccurring task. For a station it will be today's date.

Sample Media: Check to include the sample media on the label.

Sequence Number: Check to include the sequence number on the label. This is the sequence number for the lab analyses.

Analyses Required: Check to include the required analyses on the label.

Preservative: Check to include the preservative on the label.

Personnel: Check to include the sampling personnel on the label.

Save to file: Check to save the labels to a Word file instead of printing them.

Number of Copies: This is the number of copies of the labels to print. If the labels are being saved to a file this field will not appear.

Include existing samples: Check this box to include labels for any existing samples for the station or task.

Add Station Name: If this box is checked the name of the sample will start with the station name. When this box is checked the Prefix will contain "[Stn]" to represent where the station name will be placed.

Increment sample number across stations: If checked the sample number will increase across stations, otherwise it will start again with each station. If there is only one station or the labels are being printed from a station this field will not appear.

Prefix: This is the text to appear at the beginning of each sample name. The sample name is comprised of the prefix followed by the sample number. If the station name is being added to the sample number, the prefix can contain text before or after the station name.

Number of Samples/Station: This is the number of samples to generate for each station.

Starting Sample Number: This is the starting sample number.

2.6 Printing a Chain of Custody

A Chain of Custody (COC) can be printed or saved to a file for a task or station. If they are being printed from a task, they will include all of the stations for the task. The COC is in a specific format for each lab. GAEA will be updating these forms as more labs are added. If your lab or their COC format is not listed please contact GAEA to arrange for them to be added.

The following can be specified on this form:

Lab: This is the laboratory that the samples will be shipped analysed.

COC: This is the laboratory form to use for the COC. These forms will change depending on the lab.

Analyses: If checked this will add the lab analysis to be performed on the COC.

Analysis Required: If checked this will place an "X" for each sample and analysis required on the COC.

Media: If checked this will add the sample media to the COC.

Abbreviations: If checked this will display abbreviations for the sample media on the COC. For example, instead of "Groundwater" it will display "GW".

Personnel: If checked this will add the sampling personnel to the COC.

Sample Date: If checked this will add the specified sample date to the COC.

Specify Time: If checked this will add the specified time to the COC. If the COC is being generated from an all day task this field will not appear.

Save to file: Check to save the COC to a Excel instead of printing them.

Number of Copies: This is the number of copies of the COC to print. If the COC is being saved to a file this field will not appear.

Include existing samples: Check this box to include any existing samples for the station or task on the COC.

Add Station Name: If this box is checked the name of the sample will start with the station name. When this box is checked the Prefix will contain "[Stn]" to represent where the station name will be placed.

Increment sample number across stations: If checked the sample number will increase across stations, otherwise it will start again with each station. If there is only one station or the COC is being printed from a station this field will not appear.

Prefix: This is the text to appear at the beginning of each sample name. The sample name is comprised of the prefix followed by the sample number. If the station name is being added to the sample number, the prefix can contain text before or after the station name.

Number of Samples/Station: This is the number of samples to generate for each station.

Starting Sample Number: This is the starting sample number.

EDMS Field

User Guide

Chapter 3 Projects

Chapter 3 Projects

The initial display of EDMS Field will either consist of a project list or a list of tasks. To display the project list select [View > Projects](#) or click on the View button and select [Projects](#).

Prior to use projects must either be created or imported. After this they can be selected from the project list and edited. Projects can have either a local a local or georeferenced coordinate system. Local coordinate systems are specified in feet or meters and georeferenced coordinate systems are specified in decimal degrees.

3.1 Creating a Local Project

To create a new local project either select *File > New > Project > Local* or click the New button on the main toolbar and select *Project > Local*. The New Project form below will then be displayed. This form has two tabs for the project information and address.

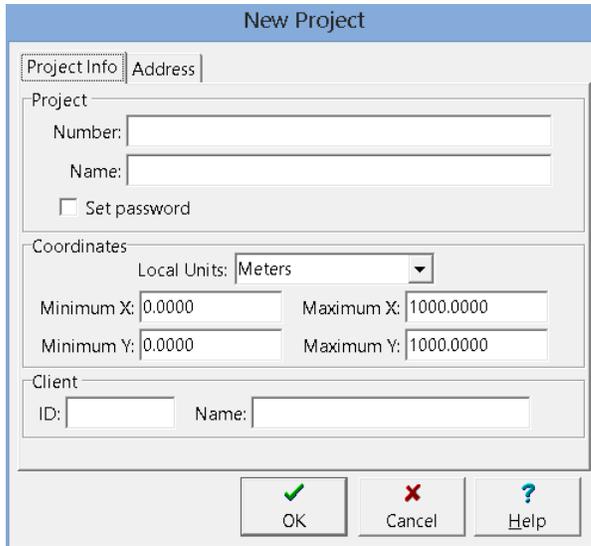
The screenshot shows a 'New Project' dialog box with the following fields and controls:

- Project Info | Address (tabs)
- Project:
 - Number: [text box]
 - Name: [text box]
 - Set password
- Coordinates:
 - Local Units: [Meters] (dropdown)
 - Minimum X: [0.0000] [Maximum X: 1000.0000]
 - Minimum Y: [0.0000] [Maximum Y: 1000.0000]
- Client:
 - ID: [text box] Name: [text box]
- Buttons: OK (with green checkmark), Cancel (with red X), Help (with blue question mark)

After the information has been specified and the Ok button pressed, the project will be created and then opened.

3.1.1 Project Info Tab

The Project Info tab is used to specify the project's information and extents.



The screenshot shows a 'New Project' dialog box with the 'Project Info' tab selected. The dialog is divided into several sections: 'Project' with fields for 'Number' and 'Name', and a 'Set password' checkbox; 'Coordinates' with a 'Local Units' dropdown set to 'Meters', and four input fields for 'Minimum X', 'Maximum X', 'Minimum Y', and 'Maximum Y', all containing the value '0.0000'; and 'Client' with fields for 'ID' and 'Name'. At the bottom are three buttons: 'OK' (with a green checkmark), 'Cancel' (with a red X), and 'Help' (with a blue question mark).

The following information can be specified on this tab:

Project Number: This is the unique project number.

Project Name: This is the name of the project.

Local Units: Select either feet or meters for the local units to use for the project.

Minimum X: This is the left boundary of the project in local units.

Maximum X: This is the right boundary of the project in local units.

Minimum Y: This is the lower boundary of the project in local units.

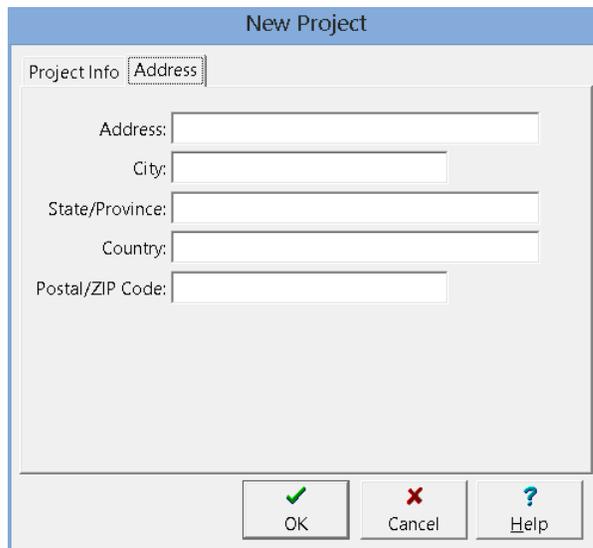
Maximum Y: This is the upper boundary of the project in local units.

Client ID: This is an optional client identification.

Client Name: This an optional client name.

3.1.2 Address Tab

The Address tab is used to specify the location of the project.



The screenshot shows a dialog box titled "New Project" with a tabbed interface. The "Address" tab is selected, showing five text input fields for "Address:", "City:", "State/Province:", "Country:", and "Postal/ZIP Code:". At the bottom, there are three buttons: "OK" (with a green checkmark), "Cancel" (with a red X), and "Help" (with a blue question mark).

The following information can be specified on this tab:

Address: This is the street address of the project.

City: This is the city of the project.

State/Province: This is the state or province of the project.

Country: This is the country of the project.

Postal/ZIP Code: This is the postal or ZIP code of the project.

3.2 Creating a Georeferenced Project

To create a new local project either select *File > New > Project > Georeferenced* or click the New button on the main toolbar and select *Project > Georeferenced*. The New Project form below will then be displayed. This form has three tabs for the project information, address, and local coordinates.

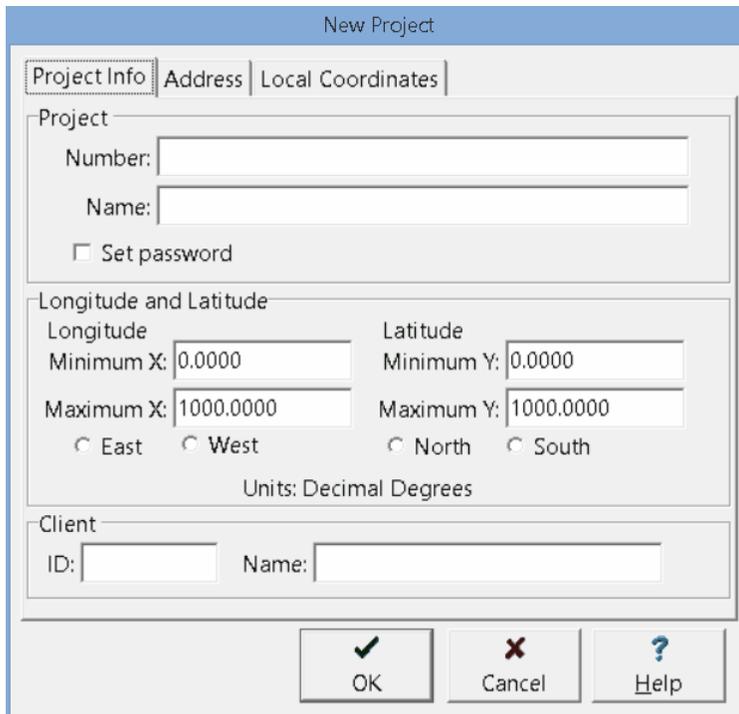
The screenshot shows the 'New Project' dialog box with the following fields and options:

- Project Info** (selected tab):
 - Project Number: [Text Input]
 - Project Name: [Text Input]
 - Set password
- Longitude and Latitude**:
 - Longitude: Minimum X: [0.0000], Maximum X: [1000.0000]
 - Latitude: Minimum Y: [0.0000], Maximum Y: [1000.0000]
 - Units: Decimal Degrees
 - Direction: East, West, North, South
- Client**:
 - ID: [Text Input]
 - Name: [Text Input]
- Buttons: OK (checkmark), Cancel (X), Help (question mark)

After the information has been specified and the Ok button pressed, the project will be created and then opened.

3.2.1 Project Info Tab

The Project Info tab is used to specify the project's information and extents.



The screenshot shows the 'New Project' dialog box with the 'Project Info' tab selected. The dialog has three tabs: 'Project Info', 'Address', and 'Local Coordinates'. The 'Project Info' tab contains the following fields and controls:

- Project** section:
 - Number: [text input field]
 - Name: [text input field]
 - Set password
- Longitude and Latitude** section:
 - Longitude: Minimum X: [0.0000], Maximum X: [1000.0000]
 - Latitude: Minimum Y: [0.0000], Maximum Y: [1000.0000]
 - East: West: North: South:
 - Units: Decimal Degrees
- Client** section:
 - ID: [text input field]
 - Name: [text input field]

At the bottom of the dialog are three buttons: 'OK' (with a checkmark icon), 'Cancel' (with an 'X' icon), and 'Help' (with a question mark icon).

The following information can be specified on this tab:

Project Number: This is the unique project number.

Project Name: This is the name of the project.

Longitude Minimum X: This is the left boundary of the project in map units, normally it is the minimum longitude.

Longitude Maximum X: This is the right boundary of the project in map units, normally it is the maximum longitude.

East: Check this if the project is in the eastern hemisphere.

West: Check this if the project is in the western hemisphere.

Latitude Minimum Y: This is the lower boundary of the project in map units, normally it is the minimum latitude.

Latitude Maximum Y: This is the upper boundary of the project in map units, normally it is the maximum latitude.

North: Check if the project is in the northern hemisphere.

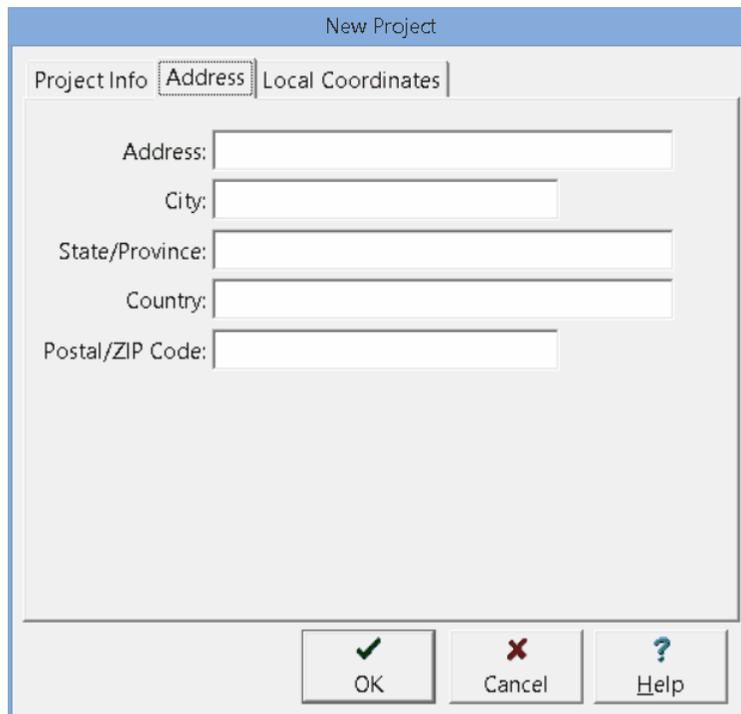
South: Check if the project is in the southern hemisphere. **Client ID:** This is an optional client identification.

Client ID: This is an optional client identification.

Client Name: This an optional client name.

3.2.2 Address Tab

The Address tab is used to specify the location of the project.



The screenshot shows a dialog box titled "New Project" with three tabs: "Project Info", "Address", and "Local Coordinates". The "Address" tab is selected. It contains five text input fields with labels: "Address:", "City:", "State/Province:", "Country:", and "Postal/ZIP Code:". At the bottom of the dialog are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a blue question mark icon).

The following information can be specified on this tab:

Address: This is the street address of the project.

City: This is the city of the project.

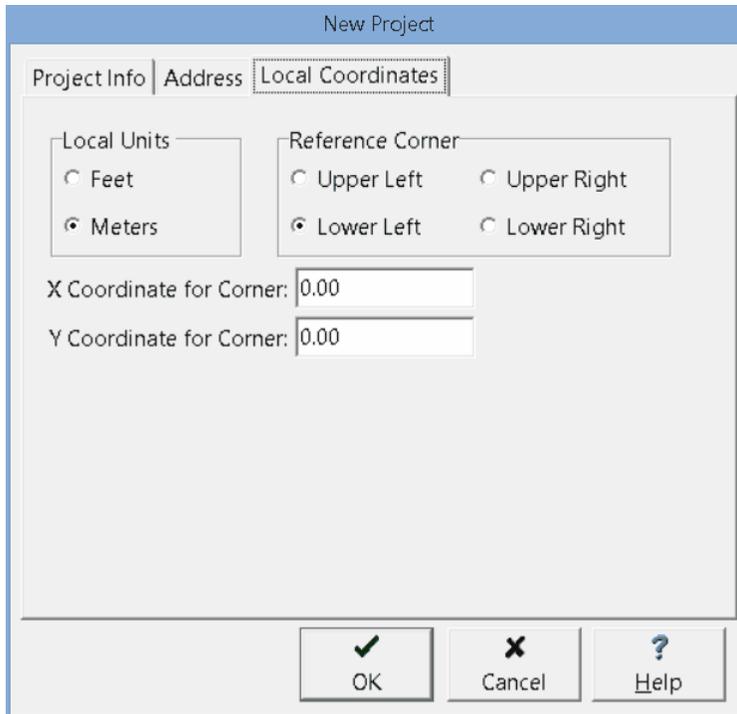
State/Province: This is the state or province of the project.

Country: This is the country of the project.

Postal/ZIP Code: This is the postal or ZIP code of the project.

3.2.3 Local Coordinates Tab

If the project is a georeferenced project the map coordinates will be in decimal degrees, for display in 3D local coordinates in either feet or meters will need to be assigned.



The screenshot shows the 'New Project' dialog box with the 'Local Coordinates' tab selected. The dialog has three tabs: 'Project Info', 'Address', and 'Local Coordinates'. The 'Local Coordinates' tab contains the following controls:

- Local Units:** A group box containing two radio buttons: 'Feet' (unselected) and 'Meters' (selected).
- Reference Corner:** A group box containing four radio buttons: 'Upper Left' (unselected), 'Upper Right' (unselected), 'Lower Left' (selected), and 'Lower Right' (unselected).
- X Coordinate for Corner:** A text input field containing the value '0.00'.
- Y Coordinate for Corner:** A text input field containing the value '0.00'.

At the bottom of the dialog are three buttons: 'OK' (with a checkmark icon), 'Cancel' (with an 'X' icon), and 'Help' (with a question mark icon).

The following information can be specified on this tab:

Local Units: Select either feet or meters.

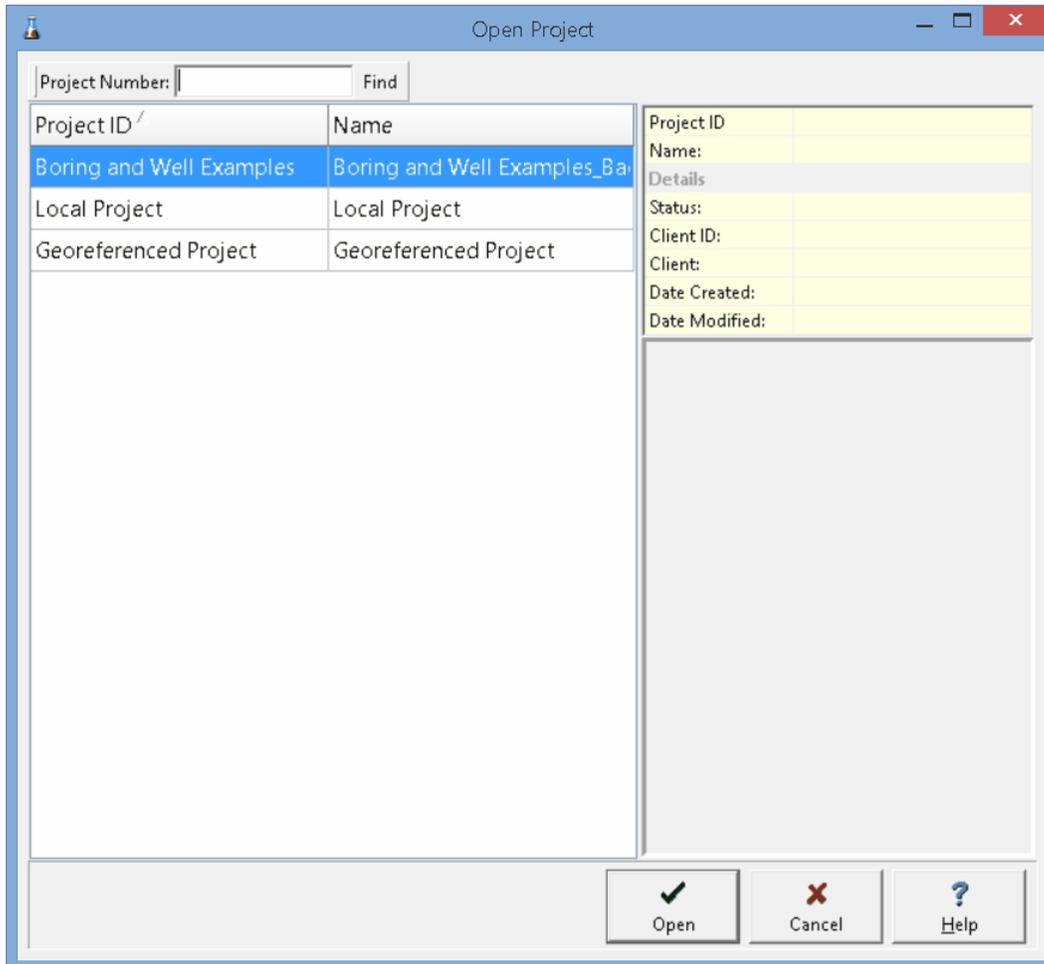
Reference Corner: Select the corner of the project to use as a reference. The x and y coordinates below will be assigned to this corner.

X Coordinate to Corner: This is the x coordinate of the reference corner.

Y Coordinate to Corner: This is the y coordinate of the reference corner.

3.3 Opening a Project

Projects can either be opened by double clicking on them in the project list, by selecting *File > Open > Project*, or clicking the Open button and selecting *Project*. If one of the last two methods is used the Open Project form will then be displayed.



Project ID	Name
Boring and Well Examples	Boring and Well Examples_Ba
Local Project	Local Project
Georeferenced Project	Georeferenced Project

Details	
Project ID	
Name	
Status	
Client ID	
Client	
Date Created	
Date Modified	

Open Cancel Help

On the left of this form is a list of projects and on the right side of the form the details of the highlighted project are shown. At the top of the form is a toolbar that can be used to find a project by specifying the project number. To select a project to open, highlight it and then click on the Open button.

3.4 Project Displays and Views

After a project is opened, the project map is typically displayed showing samples and stations. Alternatively, the project view can be changed to show a list of tasks, stations, or samples.

3.4.1 Viewing Tasks

To display a list of tasks select [View > Tasks](#). A list of tasks and the schedule will be displayed for the project. The columns to be displayed can be changed by right clicking on the first header row. A popup menu will be displayed showing all of the columns that can be displayed. Check the box next to the columns to display in the list.

The screenshot shows the EDMS Field - [Tasks] application window. The window title is "EDMS Field - [Tasks]". The menu bar includes "File", "Edit", "View", and "Help". The toolbar contains icons for "New", "Open", "View", "Help", and "Exit".

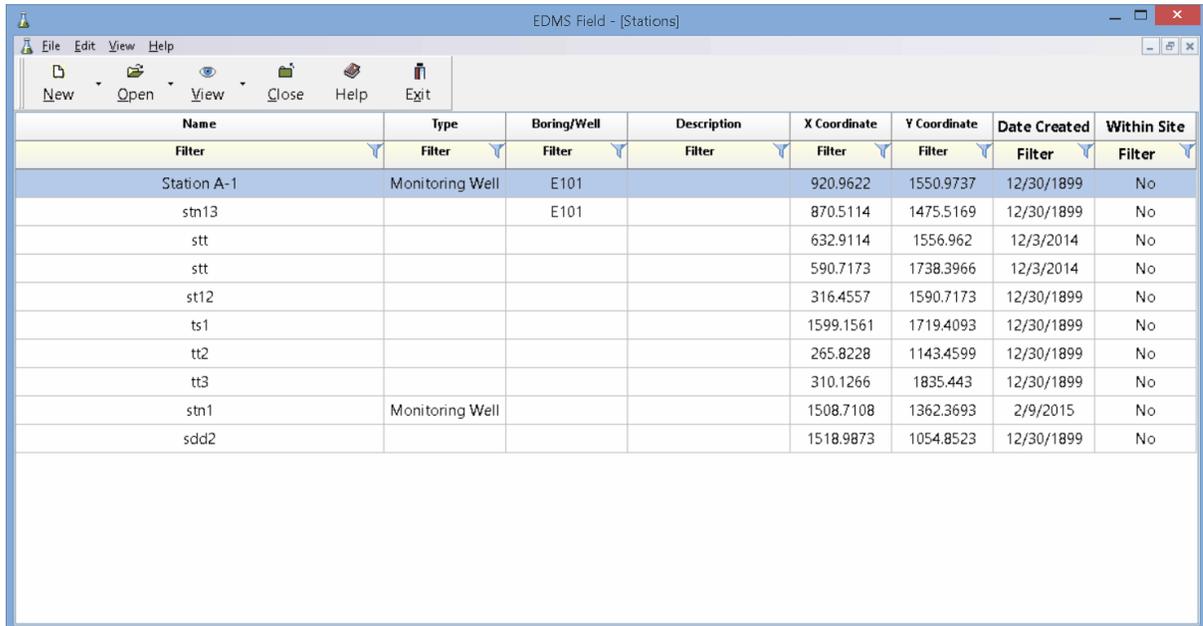
The "Task List" section is checked for "Show Current Tasks Only". It displays a table with the following data:

Project	Name	Description	Priority	Status	Recurring	Media Type
Boring and Well	task7		Urgent	Sample	No	Groundwater
ring and Well Examp	Sampling 1	uring sample colle	Urgent	Non-compliant	Yes	Groundwater

The "Schedule: June 18 - 24, 2015" section shows a calendar view. The days of the week are Thursday, Friday, Saturday, Sunday, Monday, Tuesday, and Wednesday. The time slots range from 6:00 to 12:00. A red box labeled "Reoccurring" is visible on Friday at 6:00. A calendar popup is shown on the right, displaying the month of June 2015. The date June 18 is highlighted in blue.

3.4.2 Viewing Stations

To display a list of stations select [View > Stations](#). A list of the stations will be displayed for the project. The columns to be displayed can be changed by right clicking on the first header row. A popup menu will be displayed showing all of the columns that can be displayed. Check the box next to the columns to display in the list. In addition, the data to be displayed in the list can be filtered by clicking on the filter symbol at the top of the column and selecting the type of filter. The Filter Entry Form can then be used to specify a filter as described in the [Filter Entry](#) section.

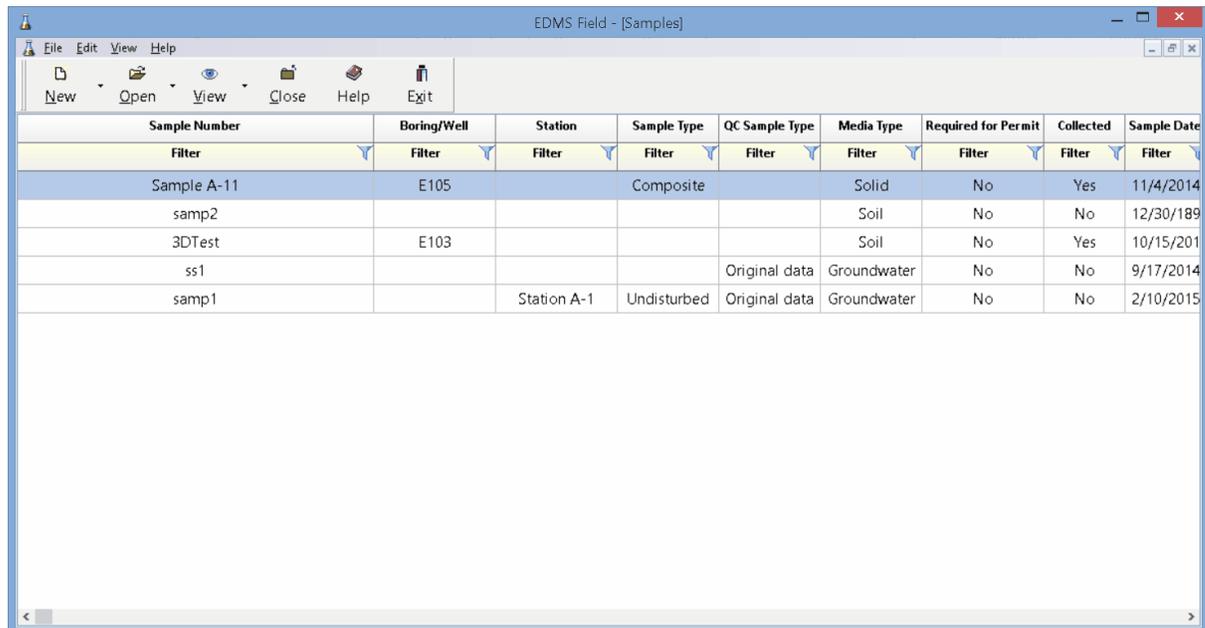


The screenshot shows the EDMS Field - [Stations] application window. The window title is "EDMS Field - [Stations]". The menu bar includes "File", "Edit", "View", and "Help". The toolbar contains icons for "New", "Open", "View", "Close", "Help", and "Exit". The main area displays a table with the following columns: Name, Type, Boring/Well, Description, X Coordinate, Y Coordinate, Date Created, and Within Site. Each column has a filter icon (a small blue triangle) above it. The table contains the following data:

Name	Type	Boring/Well	Description	X Coordinate	Y Coordinate	Date Created	Within Site
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
Station A-1	Monitoring Well	E101		920.9622	1550.9737	12/30/1899	No
stn13		E101		870.5114	1475.5169	12/30/1899	No
stt				632.9114	1556.962	12/3/2014	No
stt				590.7173	1738.3966	12/3/2014	No
st12				316.4557	1590.7173	12/30/1899	No
ts1				1599.1561	1719.4093	12/30/1899	No
tt2				265.8228	1143.4599	12/30/1899	No
tt3				310.1266	1835.443	12/30/1899	No
stn1	Monitoring Well			1508.7108	1362.3693	2/9/2015	No
sdd2				1518.9873	1054.8523	12/30/1899	No

3.4.3 Viewing Samples

To display a list of samples select [View > Samples](#). A list of the samples will be displayed for the project. The columns to be displayed can be changed by right clicking on the first header row. A popup menu will be displayed showing all of the columns that can be displayed. Check the box next to the columns to display in the list. In addition, the data to be displayed in the list can be filtered by clicking on the filter symbol at the top of the column and selecting the type of filter. The Filter Entry Form can then be used to specify a filter as described in the [Filter Entry](#) section.

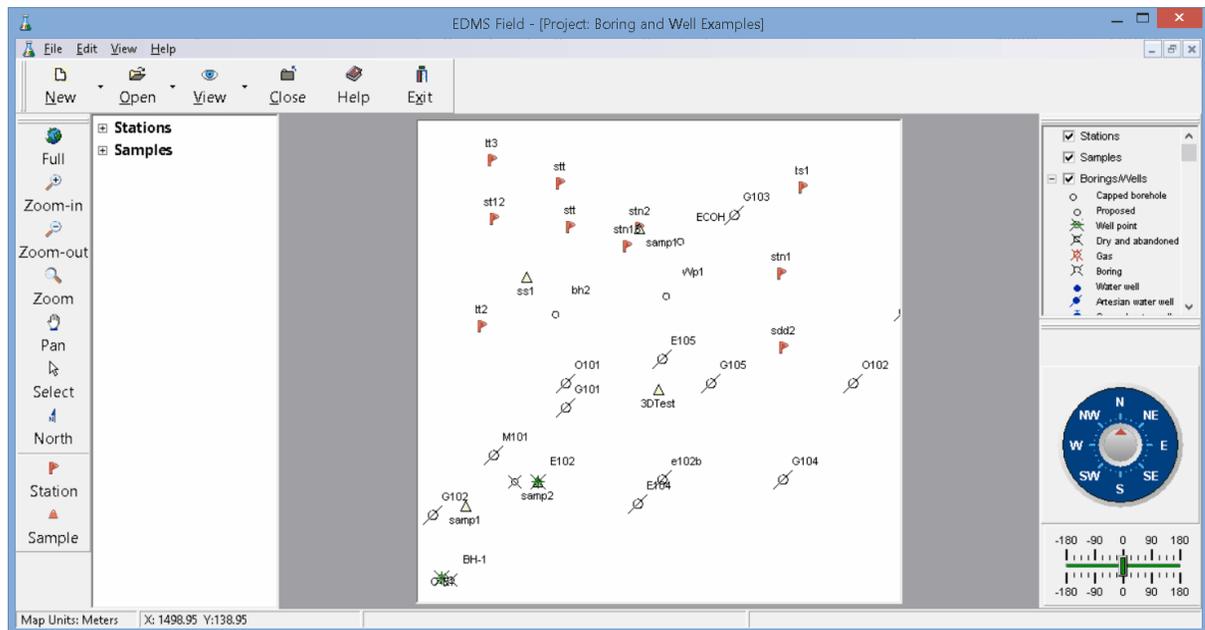


The screenshot shows the EDMS Field - [Samples] application window. The window has a menu bar with File, Edit, View, and Help. Below the menu bar is a toolbar with icons for New, Open, View, Close, Help, and Exit. The main area contains a table with the following columns: Sample Number, Boring/Well, Station, Sample Type, QC Sample Type, Media Type, Required for Permit, Collected, and Sample Date. The table has a filter icon above each column header. The data rows are as follows:

Sample Number	Boring/Well	Station	Sample Type	QC Sample Type	Media Type	Required for Permit	Collected	Sample Date
Sample A-11	E105		Composite		Solid	No	Yes	11/4/2014
samp2					Soil	No	No	12/30/189
3DTest	E103				Soil	No	Yes	10/15/201
ss1				Original data	Groundwater	No	No	9/17/2014
samp1		Station A-1	Undisturbed	Original data	Groundwater	No	No	2/10/2015

3.4.4 Viewing the Project Map

To display the project map select *Views > Map*.

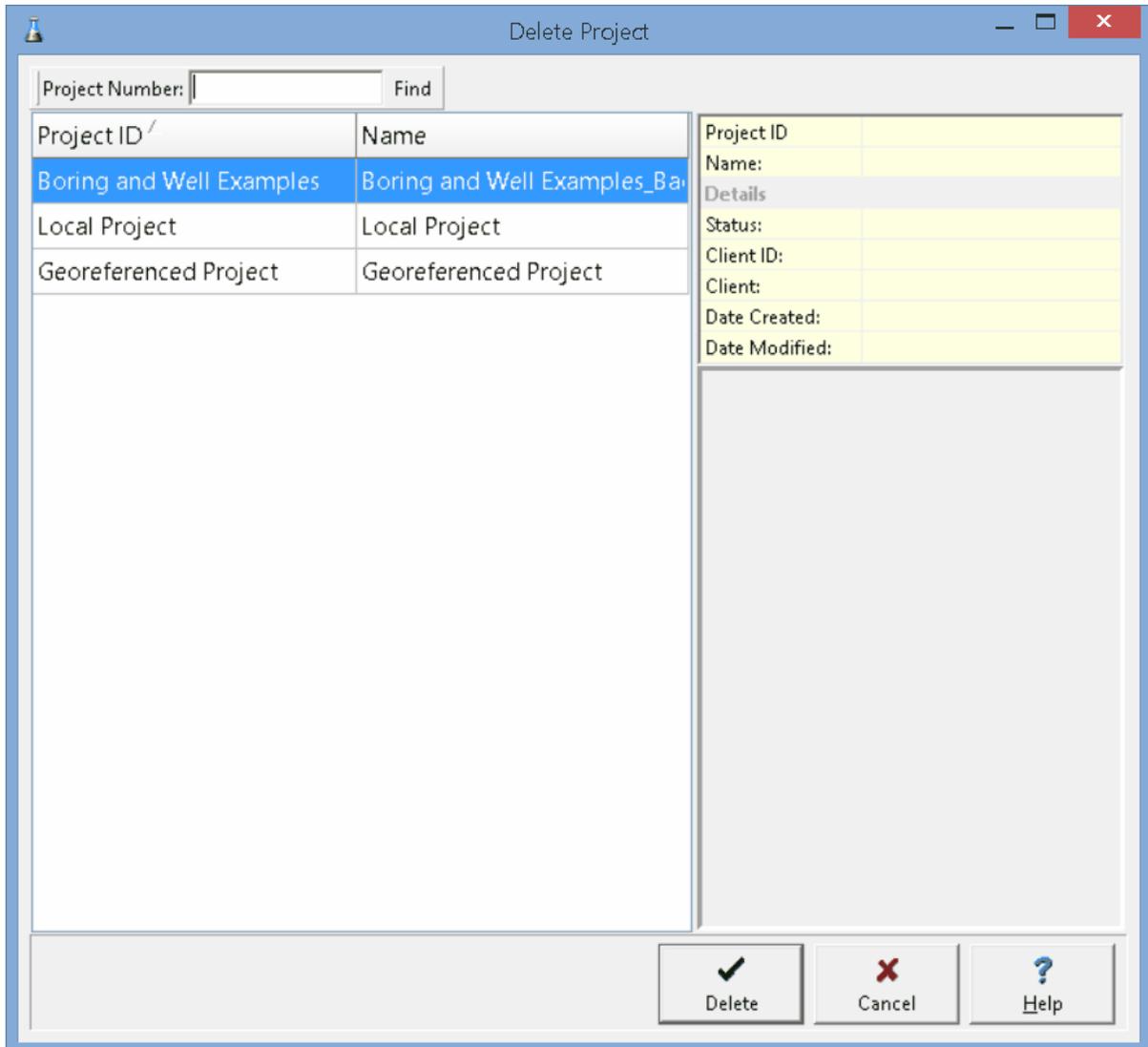


3.5 Editing a Project

The location maps used for projects are derived from the GIS. When a project is created layers for boring/well and cross-sections, stations, and sample are added. The project is used to create and open stations and samples. The details of the creation and use of these objects is described in [Stations](#)⁷² and [Samples](#)⁸⁹ chapters

3.6 Deleting a Project

An existing project can be deleting by selecting *File > Delete > Project*. The Delete Project form below will be displayed.



Project ID	Name
Boring and Well Examples	Boring and Well Examples_Ba
Local Project	Local Project
Georeferenced Project	Georeferenced Project

Details	
Project ID	
Name	
Status	
Client ID	
Client	
Date Created	
Date Modified	

Buttons: Delete, Cancel, Help

On the left of this form is a list of projects and on the right side of the form the details of the highlighted project are shown. At the top of the form is a toolbar that can be used to find a project by specifying the project number. To select a project to delete, highlight it and then click on the Delete button.

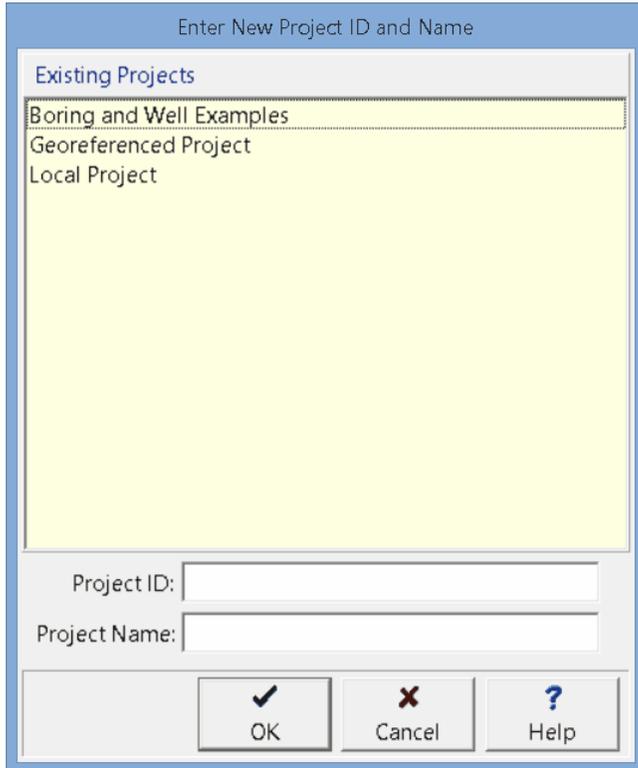
3.7 Importing a Project

A project that has been exported from GaeaSynergy can be imported into EDMS Field by XML file, FTP, or Email. No projects can be open when importing a project.

XML

To import a project from an XML file select *File > Import > Project > From XML*. You will then be prompted to specify the name of the XML file.

If the project ID already exists, the Enter Project ID and Name form will be displayed where you can specify a new unique project ID>



Enter New Project ID and Name

Existing Projects

- Boring and Well Examples
- Georeferenced Project
- Local Project

Project ID:

Project Name:

OK Cancel Help

FTP and Email

EDMS Field can automatically receive projects from GaeaSynergy via email or FTP. To use this feature, the network version of GaeaSynergy must be installed and the GaeaSynergy Service running. The projects sent from GaeaSynergy will then be imported when the EDMS Field application is started.

3.8 Exporting a Project

Projects can be exported from EDMS Field and then imported into the EDMS module by either XML file, FTP, or Email. Before exporting the project first must be opened.

Email

To export the project and send it by email, select *File > Export > Project > To Email*. The project will then be exported and emailed to the EDMS service specified in [Preferences](#)²⁴. The EDMS service will then automatically import the project into the EDMS module.

FTP

To export the project and send it by FTP, select *File > Export > Project > To FTP*. The project will then be exported and uploaded to the EDMS FTP site specified in [Preferences](#)²⁴. The EDMS service will then automatically import the project into the EDMS module.

XML

To export the project and save it in an XML file that can later be imported into the EDMS module, select *File > Export > Project > To XML*. You will then be prompted to specify the name of the file.

EDMS Field

User Guide

Chapter 4 Stations

Chapter 4 Stations

Stations can be added, edited and deleted from a project. There is no limit to the number of stations a project can contain. There should only be one station at each physical location within a project.

4.1 Adding a Station

There are three methods to add a station directly in EDMS Field.

1. Use the Create button on the [Stations and Samples tab](#)⁴¹ for a task.
2. Select *File > New > Station > Locate on Map* or click on the New button on the main toolbar and select *Station > Locate on Map*.
3. Select *File > New > Station > Locate Manually* or click on the New button on the main toolbar and select *Station > Locate Manually*.

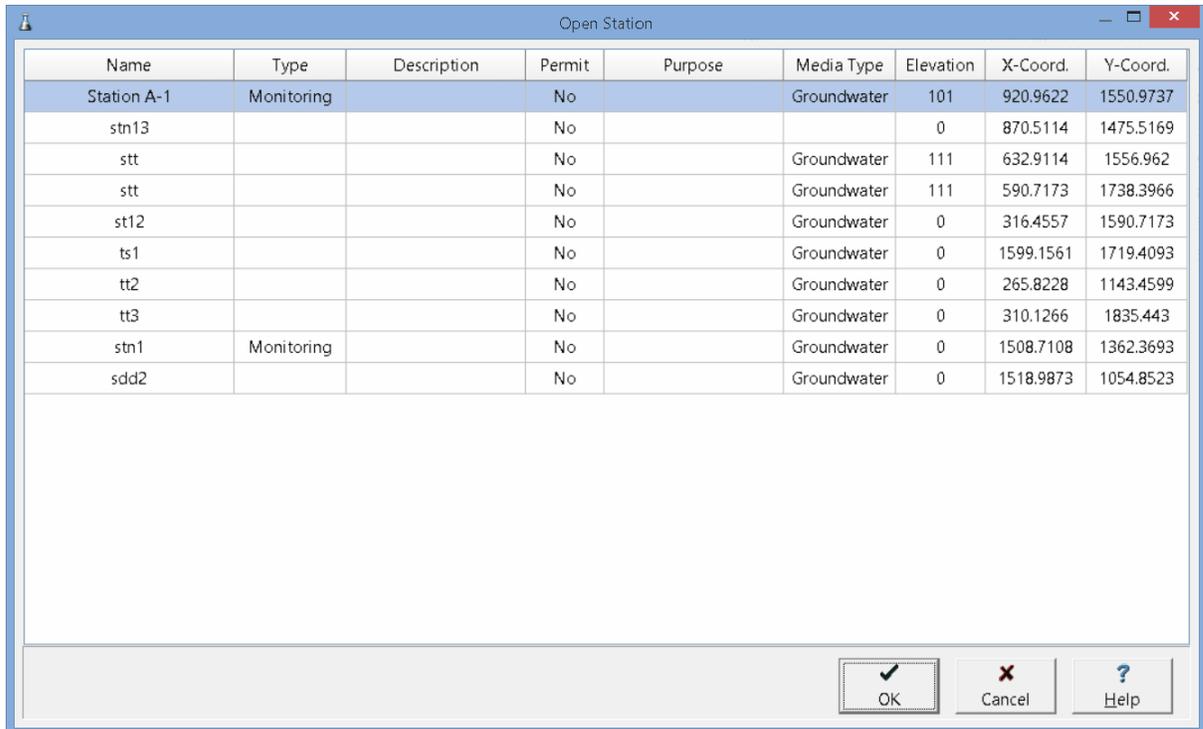
If the first two methods are used, you will be required to click on the location of the station on the project map to specify the x and y coordinates. In the third method these coordinates are entered manually on the Station Information form. After one of the three methods has been used, a Station Information form will be displayed where the data can be entered as described in the [Editing a Station](#)⁷⁵ section below.

4.2 Opening a Station

There are three ways to open an existing station:

1. By selecting it on the [Stations and Samples tab](#) ^[83] of a task and clicking on the Open button.
2. By double-clicking on it when the Station list is being viewed.
3. Or it can be selected from a list by selecting [File > Open > Station](#) or clicking on the Open button on the main toolbar and selecting [Station](#).

If the last method is used, a list of stations will then be displayed on the Open Station form.



The screenshot shows a window titled "Open Station" with a table of station data. The table has the following columns: Name, Type, Description, Permit, Purpose, Media Type, Elevation, X-Coord., and Y-Coord. The first row, "Station A-1", is highlighted in blue. Below the table are three buttons: "OK", "Cancel", and "Help".

Name	Type	Description	Permit	Purpose	Media Type	Elevation	X-Coord.	Y-Coord.
Station A-1	Monitoring		No		Groundwater	101	920.9622	1550.9737
stn13			No			0	870.5114	1475.5169
stt			No		Groundwater	111	632.9114	1556.962
stt			No		Groundwater	111	590.7173	1738.3966
st12			No		Groundwater	0	316.4557	1590.7173
ts1			No		Groundwater	0	1599.1561	1719.4093
tt2			No		Groundwater	0	265.8228	1143.4599
tt3			No		Groundwater	0	310.1266	1835.443
stn1	Monitoring		No		Groundwater	0	1508.7108	1362.3693
sdd2			No		Groundwater	0	1518.9873	1054.8523

A station can be selected on this form by double-clicking on it or by highlighting and pressing the Ok button. If you have access rights to the station, the selected station will then be displayed in the Station Information form and can be edited as described in the [Editing a Station](#) ^[75] section.

4.3 Editing a Station

After a station has been created it can be edited using the Station Information form. At the top of the form the station name, x and y coordinates can be edited. When the station is created the x and y coordinates will be filled in by the program. The form has 4 tabs for Information, Sampling Defaults, Samples, and Access Rights. The editing of these tabs is described in the sections below.

The screenshot shows the 'Station Information' window with the following fields and values:

- Station Name: Station A-1
- X Coordinate: 920.9622
- Y Coordinate: 1550.9737
- Information tab is selected.
- Station Description:

Description:	
Required for Permit:	No
Station Type:	Monitoring Well
Purpose:	
Date Created:	12/30/1899
Elevation:	101 meters
Elevation Method:	GPS Carrier Phase Kinematic Relative Positioning
Elevation Datum:	Elevation from Mean Sea Level
Alternate X-Coordinate:	0 meters
Alternate Y-Coordinate:	0
Survey Method:	GPS Carrier Phase Kinematic Relative -
Survey Accuracy:	0.1 meters
Survey Datum:	ETRS89
Data Source:	
Source Scale:	None
Reference Point:	NE Corner of Land Parcel
Within Site Boundary:	No
Station Construction:	
Station Decommissioning:	
- Station Date: 11/1/2014
- Associated Boring/Well: E101
- Buttons: Labels, COC, Email, FTP, XML, Save, Close, Help

At the top of the form there are buttons for the following:

Labels: This is used to print sample labels and is described in the section [Printing Sample Labels](#)^[47].

COC: This is used to print a Chain of Custody and is described in the section [Printing a Chain of Custody](#)^[49].

Email: This is used to email the station data to the EDMS service specified in [Preferences](#)^[24]. This data will then be automatically imported by the EDMS service and Station Uploaded on the Information tab will be checked.

FTP: This is used to upload the station data to the FTP site specified in [Preferences](#)^[24]. This data will then be automatically imported by the EDMS service and Station Uploaded on the Information tab will be checked.

XML: This will save the station data to an XML file that can then be manually imported in to the EDMS module.

Save: This will save the station data.

Close: This will close the form.

Help: This will display help on using the form.

4.3.1 Information Tab

The Information tab is used to specify the general information for the station.

Station Information	
Station Name:	Station A-1
X Coordinate:	920.9622
Y Coordinate:	1550.9737
<div style="display: flex; border-bottom: 1px solid black;"> Information Sampling Defaults Samples Access Rights </div>	
Description:	
Required for Permit:	No
Station Type:	Monitoring Well
Purpose:	
Date Created:	12/30/1899
Elevation:	101 meters
Elevation Method:	GPS Carrier Phase Kinematic Relative Positioning
Elevation Datum:	Elevation from Mean Sea Level
Alternate X-Coordinate:	0 meters
Alternate Y-Coordinate:	0
Survey Method:	GPS Carrier Phase Kinematic Relative -
Survey Accuracy:	0.1 meters
Survey Datum:	ETRS89
Data Source:	
Source Scale:	None
Reference Point:	NE Corner of Land Parcel
Within Site Boundary:	No
Station Construction:	
Station Decommissioning:	
Associated Boring/Well:	E101 Link

The following information can be specified on this tab:

Description: This is a description of the station.

Required for Permit: Select Yes if this task is required to maintain a permit for the project.

Station Type: This is used to select the type of station from the list of Station Types.

Purpose: This is the purpose of the station.

Date Created: This is used to select the date the station was created.

Elevation: This is the elevation of the ground surface at the station and units of the elevation of the station.

Elevation Method: This is used to select the method used to obtain the elevation from a list of Elevation Methods.

Elevation Datum: This is used to select the reference datum of the elevation datum from a list of Elevation Datums.

Alternate X-Coordinate: This is used to specify an alternate x coordinate for the station and the units for the alternate coordinates.

Alternate Y-Coordinate: This is used to specify an alternate y coordinate for the station.

Survey Method: This is used to select the survey method from a list of Survey Methods.

Survey Accuracy: This is used to specify the survey accuracy and the units for the accuracy.

Survey Datum: This is used to select the reference datum for the latitude and longitude from a list of Survey Datums.

Data Source: This is used to specify the data source.

Source Scale: This is the scale of source used to determine the latitude and longitude and is selected from a list of Source Scales.

Reference Point: This describes the location at which the coordinates were established and is selected from a list of Reference Points.

Within Site Boundary: Select Yes if the station is within the site boundaries of the project.

Station Construction: This is used to specify how the station was constructed.

Station Decommissioning: If the station has been decommissioned, this is used to specify how it was decommissioned.

Contractor: This is used to specify the contractor that constructed the station.

Associated Boring/Well: If the station is associated with a boring or well, it can be linked to the boring or well by pressing the Link button. The Select Borehole form will be displayed as described in the Select Borehole section..

Station Uploaded: If the station has been uploaded from EDMS Field this will be checked. This can not be edited.

Date Uploaded: If the station was uploaded, this displays the date it was uploaded from EDMS Field.

4.3.1.1 Select Borehole

If a station or sample is associated with a boring or well the Select Borehole form can be used to specify the borehole/well. The list of boreholes is imported when the project is imported from the EDMS module. Select the borehole from the list and then click Ok.

Select Borehole

UWID	Name	Depth	Elevation	Status	X Coordinate	Y Coordinate
Boring and Well	BH-1	4.5	0	Boring	138.609467	90.828402
Boring and Well	bh2	10	0	Capped	588.774341	1211.912944
Boring and Well	E101	19	101	Well point	100	100
Boring and Well	E102	14	101	Well point	500	500
Boring and Well	e102b	14	101	Cone	1000	500
Boring and Well	E103	14	101	Dry and	400	500
Boring and Well	E104	14	101		900	400
Boring and Well	E105	24	101		1000	1000
Boring and Well	ECOH	4	0	Capped	1104.238259	1512.027491
Boring and Well	G101	22	0		600	800
Boring and Well	G102	31	102		50	350
Boring and Well	G103	19	0		1300	1600
Boring and Well	G104	17.2	0		1500	500
Boring and Well	G105	9	101		1200	900
Boring and Well	M101	9.2	0		300	600
Boring and Well	O101	25	0		600	900
Boring and Well	O102	60	0		1790	900

OK Cancel Help

4.3.2 Sampling Defaults Tab

The Sampling Defaults tab is used to specify the type of sampling, lab analysis, personnel, and equipment required for the station. If the station was created from a task, this information is inherited from the task.

Station Information

Labels COC Email FTP XML Save Close Help

Station Name: Station A-1 X Coordinate: 920.9622 Y Coordinate: 1550.9737

Information Sampling Defaults Samples Access Rights

Media/Matrix Type:	Groundwater
Sub-media Type:	
Collection Method:	Bailer
Variances:	
Methodology:	D4448-01(2013)
Laboratory:	ALS, Springvale

Lab Analyses:

Parameters	Seq #	Container	Size	Units	Preservative

Personnel: Add Remove

First Name	Last Name

Equipment: Add Remove

Name	Quantity

The following information can be specified on this tab:

Media/Matrix Type: This is used to select the media or matrix to be sampled. It can be Soil, Groundwater, Surface Water, Rock, Solid, Fluid, Biological, Air, or Other.

Sub-media Type: If the media/matrix type is Fluid, Solid, or Other the sub-media type can be selected. If the media-matrix type is Fluid the sub-media type can be selected from the list of Fluid types. If the media/matrix type is Solid the sub-media type can be selected from the list of Solid types. And if the media/matrix type is Other the sub-media type can be selected from the list of Other types.

Collection Method: This is used to select the collection method from the list of Collection Methods.

Variances: This is used to specify any variances from normal sampling procedures.

Methodology: This is used to select the sampling methodology from the list of Sampling Methodologies.

Laboratory: This is used to select the laboratory to use for lab analyses from the list of Laboratories.

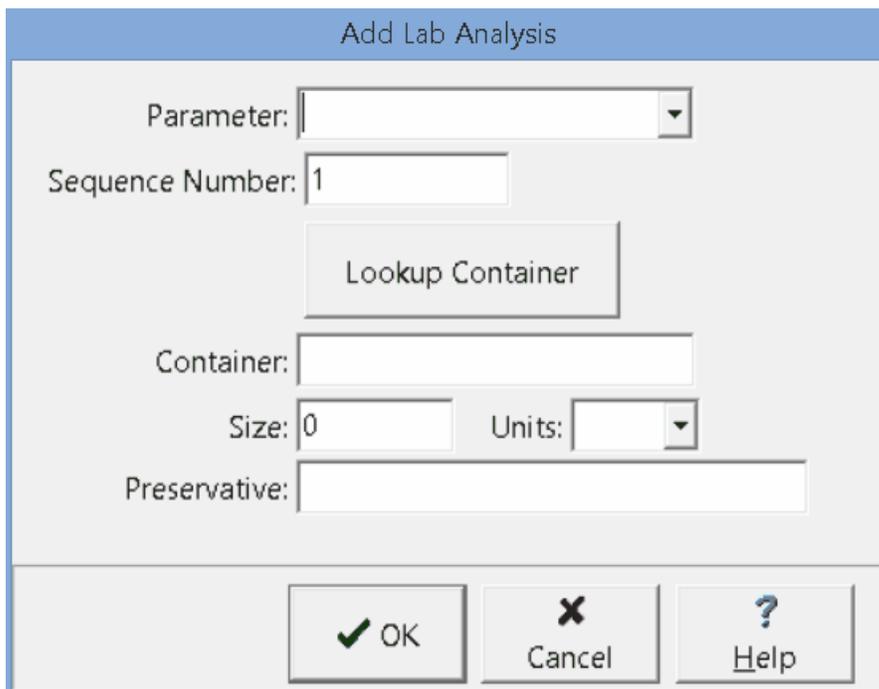
Lab Analyses: This is a list of lab analyses to be conducted on the sample. A lab analysis can be added or removed from the list using the Add and Remove buttons. When the Add button is pressed the Add Lab Analysis form is displayed and can be edited as described in the Adding a Lab Analysis section below.

Personnel: This is a list of personnel required to conduct the sampling. Personnel can be added or removed using the Add and Remove buttons. When the Add button is pressed, the Personnel form is displayed and can be used to select the personnel as described in the Personnel section.

Equipment: This is a list of equipment required to conduct the sampling. Equipment can be added or removed using the Add and Remove buttons. When the Add button is pressed, the Equipment form is displayed and can be used to select the equipment as described in the [Adding Equipment](#) section below. The Quantity for each item of equipment can also be specified.

4.3.2.1 Adding a Lab Analysis

When the Add Lab Analysis button on the Station form is clicked the Add Lab Analysis form will be displayed. This form is used to add default lab analyses to be conducted on samples from the station.



The screenshot shows a dialog box titled "Add Lab Analysis". It contains the following fields and controls:

- Parameter:** A dropdown menu.
- Sequence Number:** A text box containing the value "1".
- Lookup Container:** A button.
- Container:** A text box.
- Size:** A text box containing the value "0".
- Units:** A dropdown menu.
- Preservative:** A text box.
- Buttons:** Three buttons at the bottom: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a blue question mark icon).

The following information can be specified on this form:

Parameters: This is a group or parameters or individual parameter to be analysed.

Sequence #: Sequence numbers are used when more than one lab analysis is done on a sample.

Container: This is used to specify the type of container used for the sample. The Lookup Container button can be used to lookup the recommended container, container size, and preservative for the parameter group to be analysed. As described in the [Lookup Container](#)¹²³ section.

Container Size: This is the size and size units of the container used for the sample.

Preservative: This is the preservative used for the sample.

4.3.2.2 Adding Equipment

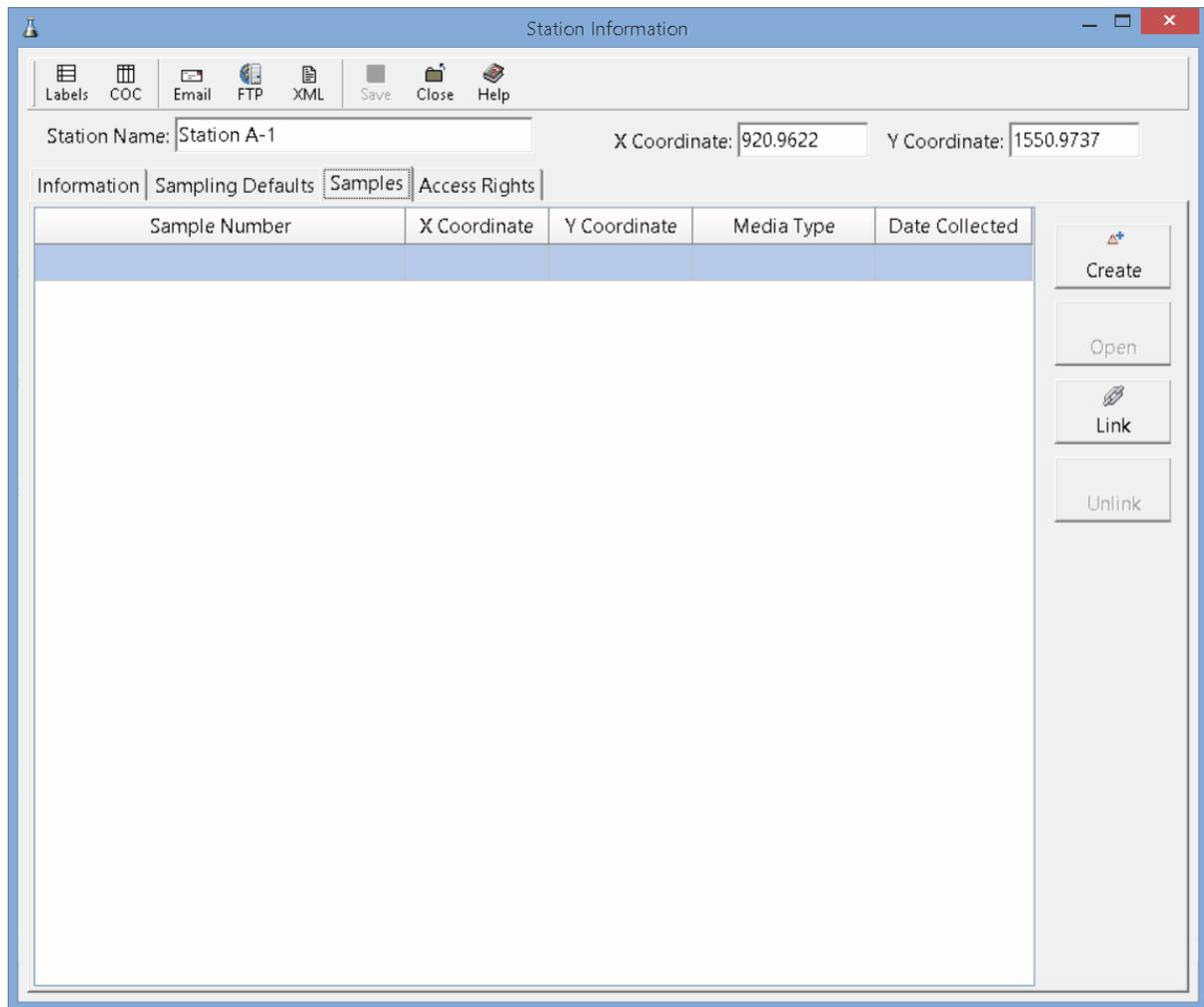
Equipment that can be selected when specifying sampling defaults can be selected from the Equipment form.

Equipment						
Category	Inventory ID	Type	Name	Model	Supplier	Status
Air	AIR01	Ambient Air Analyzer	MIE DATARAM 4000	DR-4000	Pine	In Use
Air	AIR03	PID/FID	RAE MiniRAE 3000 PID	G3000	Pine	In Use
Air	AIRM01	Methane Gas Detector	MicroFID IS Flame-Ionization	FIDI50991	Pine	In Repair
Asphalt	Gauge1	Nuclear Density Gauge	Troxler 3400	M34005001	Troxler	In Use
Asphalt	Gauge2	Nuclear Density Gauge	Troxler 4590	M459050002	Troxler	In Repair
Asphalt	Gauge3	Nuclear Density Gauge	Humboldt HS-50015D	H5001M0001	Humboldt Scientific	In Use
Asphalt	MB002	Marshall Breaking Head	4quote] Marshall Breaking Head	G-128-45-6855	Hoskin Scientific	In Use
Asphalt	MC01	Marshall Compactor	Automatic Marshall Compactor	G-563-76-84424	Hoskin Scientific	In Use
Asphalt	V001	Kinematic Viscometer	High Temperature Kinematoc	G-109-9725-B	Hoskin Scientific	In Use
Concrete	COM01	Compression Machine	2000 kN Automatic Compression	G-563-50-C2204	Hoskin Scientific	In Use
Concrete	FT001	Flexural Test Device	50-C9010/B Flexural Test Device	g-563-50-9010/B	Hoskin Scientific	In Repair
Concrete	GR001	End Grinder	Concrete Specimen End Grinder	G-402	Hoskin Scientific	In Use
Soil & Aggregates	AW001	Aggregate Washer	Ploog Aggregate Washer	g-132-W600	Hoskin Scientific	In Use
Soil & Aggregates	LAM01	Los Angeles Abrasion Machine	ELE Los Angeles Abrasion Machine	G-128-E142-5305	Hoskin Scientific	In Use
Soil & Aggregates	MG01	Soil Moisture Gauge	Troxler 4300	M43005N001	Troxler	In Use
Soil & Aggregates	SB-1	Ultrasonic Bath	W.S. Tyler Test Sieve Cleaner	W50012	Humboldt Scientific	In Use
Soil & Aggregates	TR01	Triaxial Testing System	GDS Triaxial Testing System	GD5TT5	Hoskin Scientific	In Use

The list of equipment is imported into EDMS Field when the predefined EDMS list data is imported. To select a piece of equipment either double-click on it or select it and click on the Ok button.

4.3.3 Samples Tab

The Samples tab is used to list and associate all of the samples connected to the station.



The samples list displays all of the samples that have been collected to date for the station. This list displays the sample name/number, x and y coordinates, media type, and date collected for each sample. The buttons beside the list perform the following functions:

Create: This creates a new sample for the station. When pressed the project map will be displayed where the location of the sample can be specified, then the Sample Information form will be displayed. The data for the sample can be entered on this form as described in the [Editing a Sample](#)⁹² section. The default sample information, personnel, lab analyses and access rights on the form will be filled in automatically using the defaults from the station.

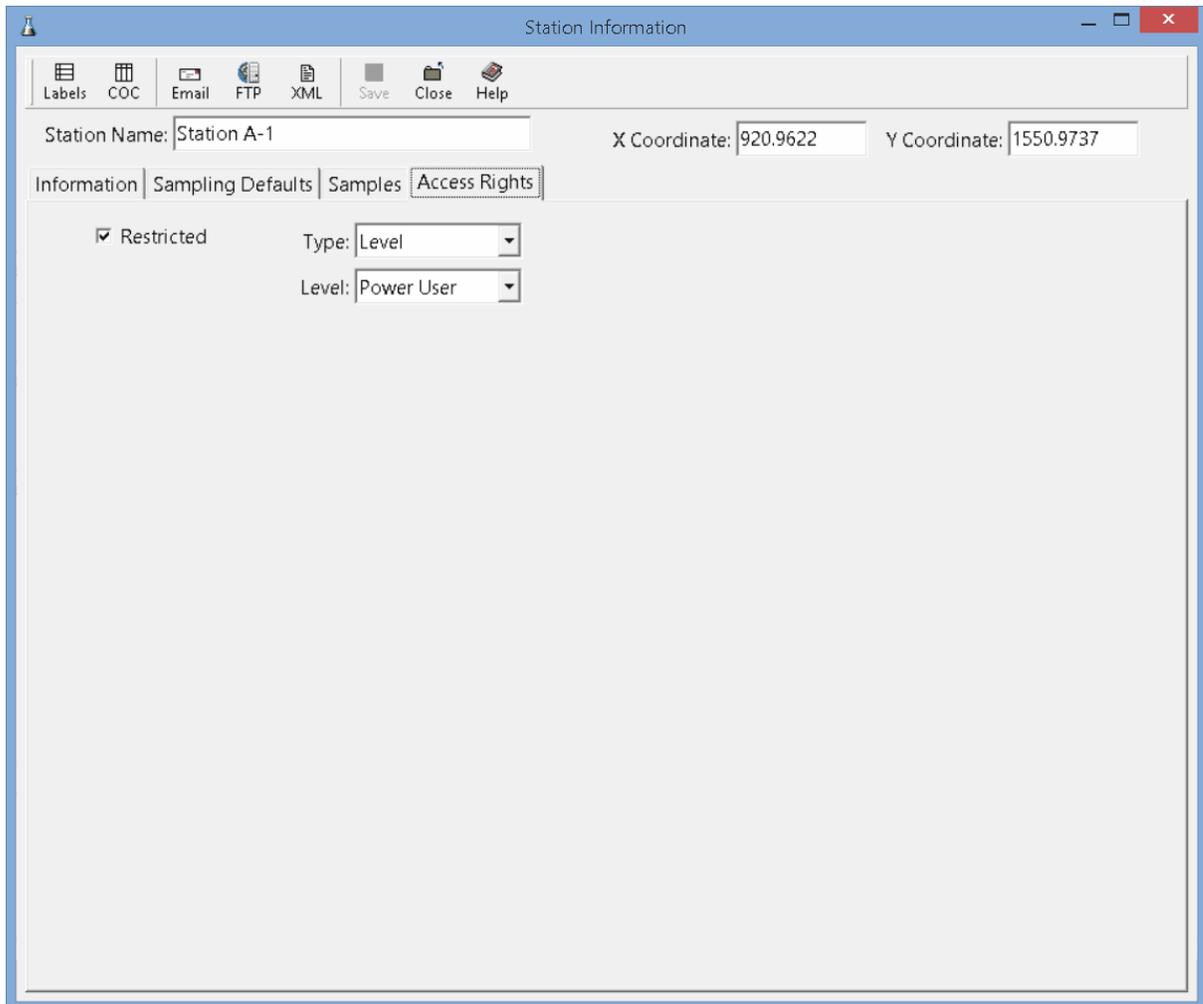
Open: This will open the selected sample for editing as described in the [Editing a Sample](#)⁹² section.

Link: This will display a list of existing samples, from which a sample can be selected to add to the station.

Unlink: This will remove the selected sample from the list of samples for the station. It will not delete the selected sample.

4.3.4 Access Rights Tab

The Access Rights tab is used to control who can view and edit the station. If the station was created from a task, this information is inherited from the task. In addition, these access rights are passed down to samples that are created within the station.



The screenshot shows a software window titled "Station Information" with a standard Windows-style title bar (minimize, maximize, close). Below the title bar is a toolbar with icons for Labels, COC, Email, FTP, XML, Save, Close, and Help. The main content area is divided into tabs: Information, Sampling Defaults, Samples, and Access Rights (which is currently selected). In the "Access Rights" tab, there is a "Station Name" field containing "Station A-1", and two coordinate fields: "X Coordinate" with "920.9622" and "Y Coordinate" with "1550.9737". Below these fields, there is a "Restricted" checkbox which is checked. To the right of the checkbox are two dropdown menus: "Type" set to "Level" and "Level" set to "Power User".

The following can be edited on this tab:

Restricted: Check this box to restrict access to the station, uncheck to not restrict access.

Type: This is used to control the type of access to the station. Access can be controlled by either Personnel or Privilege Level. This field not appear if the Restricted box is unchecked.

Privilege Level: If the Type is set to Privilege Level, this will be visible and is used to select the privilege level required to access the station. There are four privilege levels; administrator, power, limited, and guest. Anyone with the required or higher privilege level will be able to access the station.

Personnel: If the Type is set to Personnel, this will be visible and is used to select the personnel that can access the station. The personnel in the list can be added and removed using the Add and Remove buttons. When the Add button is pressed the Personnel form is displayed and the personnel can be

selected as described in the [Personnel](#)^[86] section below. When the Remove button is pressed the selected personnel will be removed from the list.

4.3.4.1 Personnel

When adding personnel to the access rights the Personnel form will be displayed. The personnel that can be selected are specified in the main EDMS module of GaeaSynergy and must be imported with the [Lookup List Data](#)^[33].

Personnel

Personnel:

Username:

Password:

User Type:

First Name:

Last Name:

Title:

Phone Number: Country Code:

Cell Number:

Email:

Department:

Office:

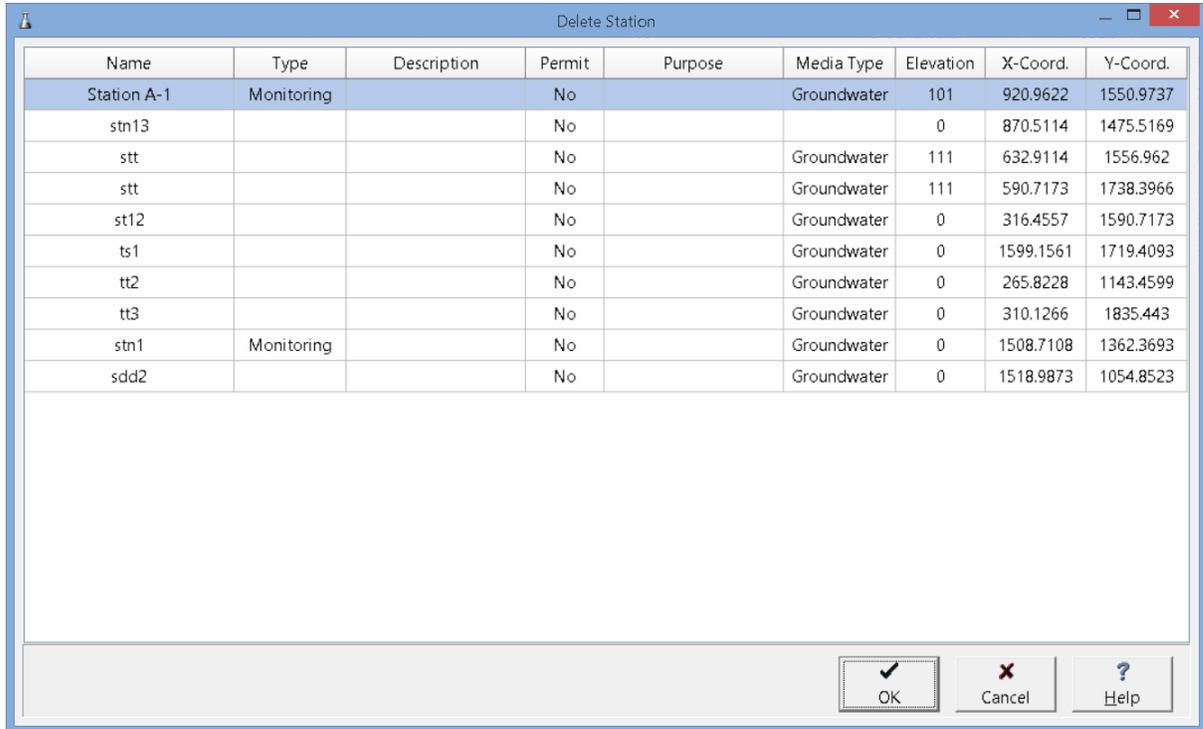
Accreditation:

Additional Information

To add a person to the access rights select their name in the Personnel combo box and then click on the Select button.

4.4 Deleting a Station

An existing station can be deleted by selecting *File > Delete > Station*. A list of stations will then be displayed on the Delete Station form.



The screenshot shows a window titled "Delete Station" containing a table of stations. The table has the following columns: Name, Type, Description, Permit, Purpose, Media Type, Elevation, X-Coord., and Y-Coord. The first row, "Station A-1", is highlighted in blue. Below the table are three buttons: "OK", "Cancel", and "Help".

Name	Type	Description	Permit	Purpose	Media Type	Elevation	X-Coord.	Y-Coord.
Station A-1	Monitoring		No		Groundwater	101	920.9622	1550.9737
stn13			No			0	870.5114	1475.5169
stt			No		Groundwater	111	632.9114	1556.962
stt			No		Groundwater	111	590.7173	1738.3966
st12			No		Groundwater	0	316.4557	1590.7173
ts1			No		Groundwater	0	1599.1561	1719.4093
tt2			No		Groundwater	0	265.8228	1143.4599
tt3			No		Groundwater	0	310.1266	1835.443
stn1	Monitoring		No		Groundwater	0	1508.7108	1362.3693
sdd2			No		Groundwater	0	1518.9873	1054.8523

A station can be selected on this form by double-clicking on it or by highlighting and pressing the Ok button. If you have access rights to the station, the selected station will then be deleted.

EDMS Field

User Guide

Chapter 5 Samples

Chapter 5 Samples

Samples can be added, edited and deleted from a project. There is no limit to the number of samples a project can contain. Samples can be associated with stations and tasks, or unassociated.

5.1 Adding a Sample

There are three methods to add a sample directly in EDMS Field.

1. Use the Create button on the [Stations and Samples tab](#)⁴¹ for a task.
2. Select *File > New > Sample > Locate on Map* or click on the New button on the main toolbar and select *Sample > Locate on Map*.
3. Select *File > New > Sample > Locate Manually* or click on the New button on the main toolbar and select *Sample > Locate Manually*.

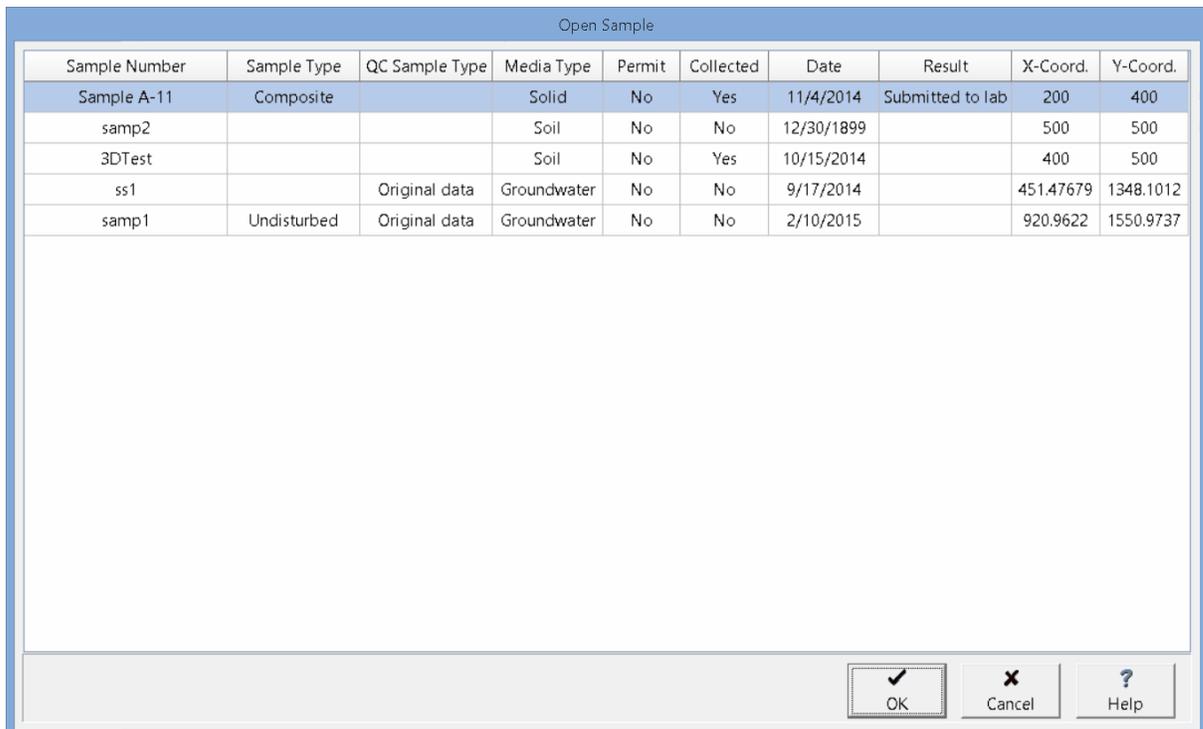
If the first two methods are used, you will be required to click on the location of the sample on the project map to specify the x and y coordinates. In the third method these coordinates are entered manually on the Sample Information form. After one of the three methods has been used, a Sample Information form will be displayed where the data can be entered as described in the [Editing a Sample](#)⁹² section below.

5.2 Opening a Sample

There are three ways to open an existing sample:

1. By selecting it on the [Stations and Samples tab](#) of a task and clicking on the Open button.
2. By double-clicking on it when the Sample list is being viewed.
3. Or it can be selected from a list by selecting [File > Open > Sample](#) or clicking on the Open button on the main toolbar and selecting [Sample](#).

If the last method is used, a list of samples will then be displayed on the Open Sample form.



The screenshot shows a dialog box titled "Open Sample" with a table of sample data. The table has the following columns: Sample Number, Sample Type, QC Sample Type, Media Type, Permit, Collected, Date, Result, X-Coord., and Y-Coord. The data rows are:

Sample Number	Sample Type	QC Sample Type	Media Type	Permit	Collected	Date	Result	X-Coord.	Y-Coord.
Sample A-11	Composite		Solid	No	Yes	11/4/2014	Submitted to lab	200	400
samp2			Soil	No	No	12/30/1899		500	500
3DTest			Soil	No	Yes	10/15/2014		400	500
ss1		Original data	Groundwater	No	No	9/17/2014		451.47679	1348.1012
samp1	Undisturbed	Original data	Groundwater	No	No	2/10/2015		920.9622	1550.9737

At the bottom of the dialog box, there are three buttons: "OK" (with a checkmark icon), "Cancel" (with an 'X' icon), and "Help" (with a question mark icon).

A sample can be selected on this form by double-clicking on it or by highlighting and pressing the Ok button. If you have access rights to the sample, the selected sample will then be displayed in the Sample Information form and can be edited as described in the [Editing a Sample](#) section.

5.3 Editing a Sample

After a sample has been created it can be edited using the Sample Information form. At the top of the form the sample name/number and media type can be edited. The form has 5 tabs for Information, Description, Lab Analyses, media data, and Access Rights. The media data tab will be different for each media type and is used to enter the data specific to the media type. The editing of these tabs is described in the sections below.

At the top of the form there are buttons for the following:

Email: This is used to email the sample data to the EDMS service specified in [Preferences](#)^[24]. This data will then be automatically imported by the EDMS service and Sample Uploaded on the Information tab will be checked.

FTP: This is used to upload the sample data to the FTP site specified in [Preferences](#)^[24]. This data will then be automatically imported by the EDMS service and Sample Uploaded on the Information tab will be checked.

XML: This will save the sample data to an XML file that can then be manually imported in to the EDMS module.

Save: This will save the sample data.

Close: This will close the form.

Help: This will display help on using the form.

5.3.1 Information Tab

The Information tab is used to specify the general information for the sample.

Sample Type:	Composite
Continuous:	No
Required for Permit:	No
Purpose:	
Location:	
X Coordinate:	200
Y Coordinate:	400
Elevation:	102 meters
Collection Method:	Hand-held Sampler
Methodology:	D4700-91(2006)
Variations:	
Sampling Result:	Submitted to lab
Sampling Company:	
Sources of Environmental Risk:	
Weather:	
Field Comments:	
Additional Comments:	
Number of Composites:	0

The following information can be specified on this tab:

Station: If the sample is associated with a station, the station will be shown. This can not be edited.

Task: If the sample is associated with a task, the task will be shown. This can not be edited.

Collected: This should be checked if the sample has been collected.

Sample Date: If the sample is not continuous and has been collected, this is used to select the collection date.

Start Date: If the sample is continuous and has been collected, this is used to select the start date.

End Date: If the sample is continuous and has been collected, this is used to select the end date.

Specify Time: If the sample has been collected, this is used to indicate whether the time of collection should be specified.

Sample Time: If the time of collection is being specified and the sample is not continuous this is used to select the time.

End Time: If the time of collection is being specified and the sample is continuous this is used to select the time.

Sample Time: If the time of collection is being specified and the sample is continuous this is used to select the time.

Sample Uploaded: If the sample has been uploaded from EDMS Field this will be checked. This can not be edited.

Date Uploaded: If the sample was uploaded, this displays the date it was uploaded from EDMS Field.

Sample Type: This is used to select the sample type from the list of Sample Types;

Continuous: This is used to select whether the sample is continuous.

Required for Permit: Select Yes if this task is required to maintain a permit for the project

Purpose: This is used to specify the purpose of the sample.

Location: This is used to specify the location of the sample.

X Coordinate: This is used to specify the x coordinate of the sample. When the sample is created the x and y coordinates will be filled in by the program.

Y Coordinate: This is used to specify the y coordinate of the sample.

Elevation: This is used to specify the elevation and elevation units of the sample.

Collection Method: This is used to select the collection method from the list of Collection Methods.

Methodology: This is used to select the sampling methodology from the list of Methodologies.

Variances: This is used to specify any variances from the methodology.

Sampling Result: This is used to select the sample result from the list of Sampling Results.

Sampling Company: This is used to specify the sampling company.

Sources of Environmental Risk: This is used to specify any sources of environmental risk.

Weather: This is used to specify the weather at the time of sampling.

Field Comments: This is used to specify any field comments.

Additional Comments: This is used to specify any additional comments.

Number of Composites: This is used to specify the number of composites.

Associated Boring/Well: If the sample is associated with a boring or well, it can be linked to the sample.

5.3.2 Description Tab

The Description tab is used to specify the descriptors, photos, and sampling personnel.

Sample Information

Email FTP XML Save Close Help

Sample Number: Sample A-11 Media Type: Solid

Information **Description** Lab Analyses Solid Data Access Rights

Descriptors

Level	Descriptor	Description

Photos + Add - Remove

Sampling Personnel + Add - Remove

Last Name	First Name

The following information can be entered on this tab:

Descriptors: In addition to the general information and media type data, any number of descriptors can be specified and entered for each media type. These descriptors are specified in the list of Descriptors. On this tab the description for each descriptor for the selected media type can be specified.

Photos: Sample photos can be added and removed for the sample using the Add and Remove buttons. When a sample photo is added a link to the photo file is shown in the list. When a photo is removed the link is deleted and the photo is not deleted. When a photo is highlighted in the list a preview of the photo will be shown on the right.

Sampling Personnel: The sampling personnel can be added and removed using the Add and Remove buttons.

5.3.3 Lab Analyses

The lab analyses that have been conducted on the sample or are to be conducted are specified on this tab.

Sample Information

Sample Number: Sample A-11 Media Type: Solid

Information | Description | **Lab Analyses** | Solid Data | Access Rights

Cooler ID:	c11
COC Number:	eeee
QC Sequence ID:	
QC Sample Type:	
Extracted:	No
Filtered:	Yes
Filter:	
Filter Size:	0

Laboratory: ALS, Prague 9

Add Open Delete

Laboratory	Lab Reference ID	Parameters	Seq #	Date Shipped
ALS		BTEX		

The following can be specified on this tab:

Cooler ID: This is used to specify the cooler ID for the sample.

COC Number: This is used to specify the Chain of Custody number.

QC Sequence ID: This is used to specify the quality control sequence ID.

QC Sample Type: This is used to select the quality control sample type from the list of QC Sample Types.

Extracted: This is used to select whether the sample was extracted.

Filtered: This is used to select whether the sample was filtered.

Filter: If the sample was filtered, this is used to select the filter from the list of Filters.

Filter Size: If the sample was filtered, this is used to specify the filter size and size units.

Laboratory: This is used to select the default analysis laboratory from the list of Laboratories. The actual laboratory that conducted the analysis may be different than the default.

Lab Analyses

This is a list of the lab analyses conducted or to be conducted on the sample. If the analysis has not been conducted the date analysed will be blank.

Add: Click the Add button to add a new lab analysis to the sample. The Lab Analysis Information form will be displayed and can be edited as described in the section [Editing a Lab Analysis](#)¹²¹.

Open: This is used to open the selected lab analysis. The selected lab analysis will be displayed on the Lab Analysis form and can be edited as described in the section [Editing a Lab Analysis](#)¹²¹.

Unlink: This will remove the selected lab analysis from the list of lab analyses for the sample. It will not delete the selected lab analysis.

5.3.4 Soil Data Tab

The Soil Data tab is used to specify the information that pertains to soil media only.

The screenshot shows the 'Sample Information' application window. The 'Soil Data' tab is selected, displaying a list of input fields for soil-related data. The fields include Depth, Sample Size, Recovery, Volume, Dry Weight, Wet Weight, Soil Type, Color, Odour, Porosity, Consistency, and VOC Reading. To the right of these fields are two large empty boxes labeled 'Mineralogy' and 'Secondary Elements', each with an 'Add' (+) and 'Remove' (-) button below it.

The following can be specified on this tab:

Depth: This is used to specify the depth and depth units of the sample.

Sample Size: This is used to specify the sample size or length and size units.

Recovery: This is used to specify the recovery if the sample is being gathered from a boring or well.

Volume: This is the volume of the sample and volume units.

Dry Weight: This is used to specify the dry weight and weight units.

Wet Weight: This is used to specify the wet weight of the sample.

Soil Type: This is used to select the soil type from the list of Soil Types.

Color: This is used to select the color from the list of Colors.

Odour: This is used to select the odour from the list of Odours.

Porosity: This is used to select the porosity from the list of Porosities.

Consistency: This is used to select the consistency from the list of Consistencies.

VOC Reading: This is used to specify the Volatile Organic Carbon reading for the sample.

Mineralogy: This is used to select the mineralogy in the sample. The Add button will display a list of Mineralogies that can be selected. The Remove button will remove the selected mineralogy from the list.

Secondary Elements: This is used to select the secondary elements in the sample. The Add button will display a list of Secondary Elements that can be selected. The Remove button will remove the selected secondary element from the list.

5.3.5 Rock Data Tab

The Rock Data tab is used to specify the information that pertains to rock media only.

The following can be specified on this tab:

Depth: This is used to specify the depth and depth units of the sample.

Sample Size: This is used to specify the sample size or length and size units.

Weight: This is used to specify the weight and weight units.

Rock Type: This is used to select the rock type from the list of Rock Types.

Composition: This is used to select the composition from the list of Compositions.

Color: This is used to select the color from the list of Colors.

Origin: This is used to specify the origin of the rock.

Weathering: This is used to select the weathering from the list of Weathering.

Texture: This is used to select the texture from the list of Textures.

Inclusions: This is used to specify any inclusions in the rock.

Fractures Present: This is used to specify if fractures are present in the rock.

Fracture Spacing: This is used to specify the fracture spacing and units.

Fracture Description This is used to describe the fractures.

Jointing Present: This is used to specify if jointing is present in the rock.

Jointing Spacing: This is used to specify the jointing spacing and units.

Jointing Description This is used to describe the jointing.

Mineralogy: This is used to select the mineralogy in the sample. The Add button will display a list of Mineralogies that can be selected. The Remove button will remove the selected mineralogy from the list.

Secondary Elements: This is used to select the secondary elements in the sample. The Add button will display a list of Secondary Elements that can be selected. The Remove button will remove the selected secondary element from the list.

5.3.6 Solid Data Tab

The Solid Data tab is used to specify the information that pertains to solid media only.

Sample Information

Email FTP XML Save Close Help

Sample Number: Sample A-11 Media Type: Solid

Information Description Lab Analyses Solid Data Access Rights

Solid Type: Sediment

Dry Weight:	1.2
Wet Weight:	1.5 kg
Volume:	0.12 cubic meters
Color:	Brownish Gray
Odour:	Weak Hydrocarbon Odour
Consistency:	Loose
Source:	1
Containment:	
Treatment:	
Disposal:	

Mineralogy: Chlorite

Secondary Elements

+ Add - Remove + Add - Remove

The following information can be specified on this tab:

Solid Type: This is used to select the type of solid from a list of Solids.

Dry Weight: This is used to specify the dry weight.

Wet Weight: This is used to specify the wet weight and weight units.

Volume: This is used to specify the volume and volume units.

Color: This is used to select the color from a list of Colors.

Odour: This is used to select the odour from the list of Odours.

Consistency: This is used to select the consistency from the list of Consistencies.

Source: This is used to specify the source of the solid.

Containment: This is used to specify the containment.

Treatment: This is used to specify the treatment of the solid.

Disposal: This is used to specify the disposal of the solid.

Mineralogy: This is used to select the mineralogy in the sample. The Add button will display a list of Mineralogies that can be selected. The Remove button will remove the selected mineralogy from the list.

Secondary Elements: This is used to select the secondary elements in the sample. The Add button will display a list of Secondary Elements that can be selected. The Remove button will remove the selected secondary element from the list.

5.3.7 Groundwater Data Tab

The Groundwater Data tab is used to specify the information that pertains to groundwater media only.

Water Depth:	
Depth Collected:	
Measurement Method:	
Monitoring Round:	
Monitoring Unit:	
Volume Collected:	
Color:	
Odour:	
Shine:	
LNAPL Present:	
LNAPL Depth:	

The following can be specified on this tab:

Water Depth: This is the depth to the water and depth units.

Depth Collected: This is the depth that the sample was collected.

Measurement Method: This is the method that was used to measure depths.

Monitoring Round: This is used to specify the monitoring round.

Volume Collected: This is used to specify the volume collected and the volume units.

Color: This is used to select the color from a list of Colors.

Odour: This is used to select the odour from a list of Odours.

Shine: This is used to specify if there is a shine on the water.

LNAPL Present: This is used to specify if an LNAPL is present.

LNAPL Depth: If an LNAPL is present, this is used to specify the depth of the LNAPL.

5.3.8 Surface Water Data Tab

The Surface Water Data tab is used to specify the information that pertains to surface water media only.

The screenshot shows a software window titled "Sample Information" with a menu bar (Email, FTP, XML, Save, Close, Help). Below the menu bar, there are input fields for "Sample Number: Sample A-11" and "Media Type: Surface water". A tabbed interface shows "Information", "Description", "Lab Analyses", "Surface water" (selected), and "Access Rights". The "Surface water" tab contains two columns of input fields:

Volume Collected:	<input type="text"/>	Calculation Method:	<input type="text"/>	Calculate
Color:	<input type="text"/>	Average Width:	<input type="text"/>	
Odour:	<input type="text"/>	Average Depth:	<input type="text"/> meters	
Shine:	<input type="text"/>	Roughness Factor:	<input type="text"/>	
Source Type:	<input type="text"/>	Velocity:	<input type="text"/> m/hour	
Source Name:	<input type="text"/>	Flow Rate:	<input type="text"/> cubic m/hour	
Drainage Basin:	<input type="text"/>			
Containment:	<input type="text"/>			
Treatment:	<input type="text"/>			
Inflows:	<input type="text"/>			
Outflows:	<input type="text"/>			
Freeboard:	<input type="text"/>			
Specify last release	<input type="text"/>			
Release Date:	<input type="text"/>			

The following can be specified on this tab:

Volume Collected: This is the volume of water collected for the sample and volume units.

Color: This is used to select the color from a list of Colors.

Odour: This is used to select the odour from a list of Odours.

Shine: This is used to specify if there is a shine on the water.

Source Type: This is used to select the source type from a list of Sources..

Source Name: This is used to specify the name of the source of the surface water.

Drainage Basin: This is used to specify the drainage basin of the surface water.

Containment: This is used to specify the containment of the surface water.

Treatment: This is used to specify any treatment of the surface water.

Inflows: This is used to specify any inflows.

Outflows: This is used to specify any outflows.

Freeboard: This is used to specify the freeboard and freeboard units.

Specify last release date: Select yes to specify a last release date.

Release Date: If a release date is being specified, this is used to select the release date.

Calculation Method: This is used to select the calculation method used to calculate the flow rate. .The calculation method may be either stream/ditch or pipe diameter. In addition, the flow rate can be specified manually.

Pipe Diameter: If the calculation method is pipe diameter, this is the diameter of the pipe and diameter units.

Average Width: If the calculation method is stream or ditch, this is the average width and width units.

Average Depth: If the calculation method is stream or ditch, this is the average depth and depth units.

Roughness Factor: If the calculation method is stream or ditch, this is used to specify the roughness factor. A coefficient or correction factor (0.8 for rocky-bottom streams or 0.9 for muddy-bottom streams). This allows you to correct for the fact that water at the surface travels faster than near the stream bottom due to resistance from gravel, cobble, etc. Multiplying the surface velocity by a correction coefficient decreases the value and gives a better measure of the stream's overall velocity.

Velocity: This is the flow velocity and velocity units.

Flow Rate: This is either the calculated flow rate or the manually entered flow rate and flow rate units.

5.3.9 Fluid Data Tab

The Fluid Data tab is used to specify the information that pertains to fluid media only.

Sample Information

Email FTP XML Save Close Help

Sample Number: Sample A-11 Media Type: Fluid

Information | Description | Lab Analyses | Fluid | Access Rights

Station: Task:

Sample Type:	Composite
Continuous:	No
Required for Permit:	No
Purpose:	
Location:	
X Coordinate:	200
Y Coordinate:	400
Elevation:	102 meters
Collection Method:	Hand-held Sampler
Methodology:	D4700-91(2006)
Variances:	
Sampling Result:	Submitted to lab
Sampling Company:	
Sources of Environmental Risk:	
Weather:	
Field Comments:	
Additional Comments:	
Number of Composites:	0

Associated Boring/Well: E105 [Link](#)

Collected

Sample Date: 11/4/2014

Specify Time: No

Sample

Date Uploaded: 11/1/2014

The following can be specified on this tab:

Volume Collected:		cubic centimeters
Color:	Medium Bluish Gray	
Odour:	Very Strong Hydrocarbon Odour	
Shine:	Yes	
Source Type:	Pond	
Source Name:		
Drainage Basin:		
Containment:		
Treatment:		
Inflows:		
Outflows:		
Freeboard:		feet
Specify last release date:	Yes	
Release Date:	11/12/2014	
Calculation Method:	Pipe Diameter	
Pipe Diameter:	12	inches
Velocity:	124	ft/hour
Flow Rate:	606.707181083068	imp gallon/hour

Fluid Type: This is used to select the type of fluid from the list of Fluids.

Volume Collected: This is the volume of water collected for the sample and volume units.

Color: This is used to select the color from a list of Colors.

Odour: This is used to select the odour from a list of Odours.

Shine: This is used to specify if there is a shine on the water.

Source Type: This is used to select the source type from a list of Sources..

Source Name: This is used to specify the name of the source of the surface water.

Drainage Basin: This is used to specify the drainage basin of the surface water.

Containment: This is used to specify the containment of the surface water.

Treatment: This is used to specify any treatment of the surface water.

Inflows: This is used to specify any inflows.

Outflows: This is used to specify any outflows.

Freeboard: This is used to specify the freeboard and freeboard units.

Specify last release date: Select yes to specify a last release date.

Release Date: If a release date is being specified, this is used to select the release date.

Calculation Method: This is used to select the calculation method used to calculate the flow rate. .The calculation method may be either stream/ditch or pipe diameter. In addition, the flow rate can be specified manually.

Pipe Diameter: If the calculation method is pipe diameter, this is the diameter of the pipe and diameter units.

Average Width: If the calculation method is stream or ditch, this is the average width and width units.

Average Depth: If the calculation method is stream or ditch, this is the average depth and depth units.

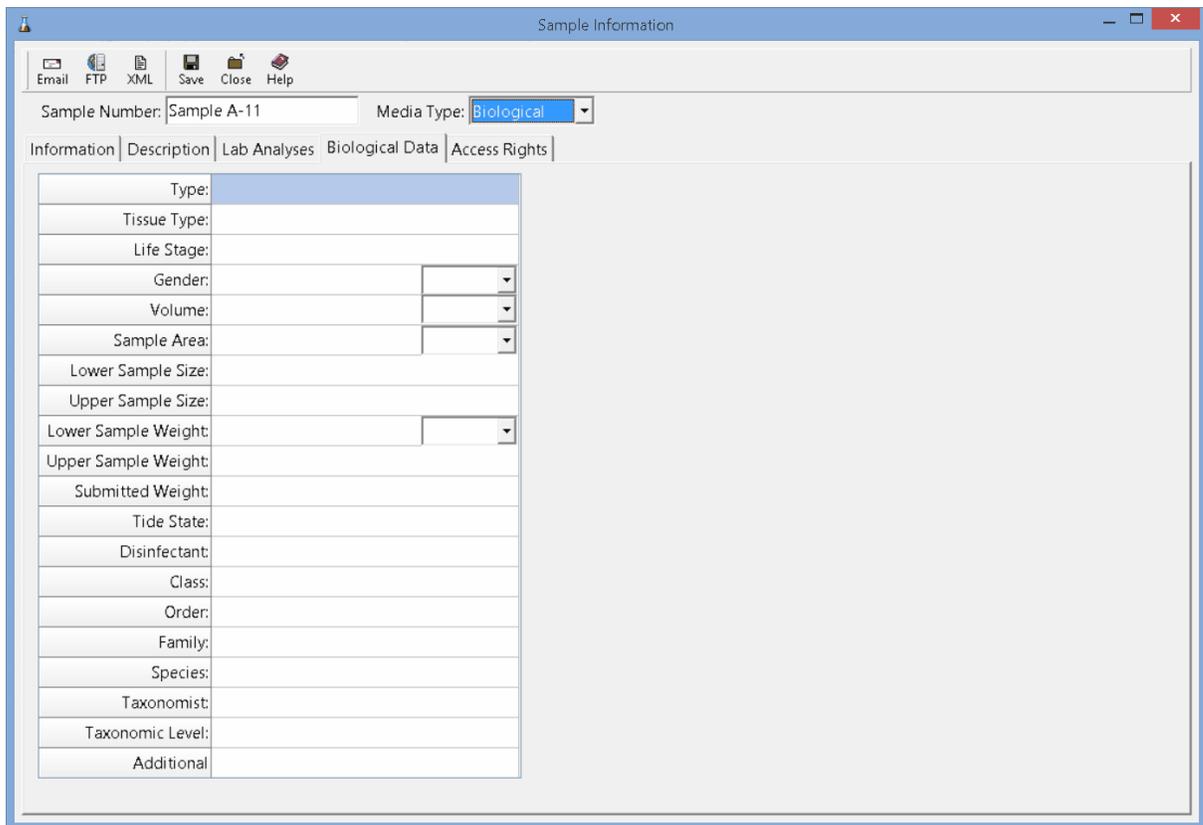
Roughness Factor: If the calculation method is stream or ditch, this is used to specify the roughness factor. A coefficient or correction factor (0.8 for rocky-bottom streams or 0.9 for muddy-bottom streams). This allows you to correct for the fact that water at the surface travels faster than near the stream bottom due to resistance from gravel, cobble, etc. Multiplying the surface velocity by a correction coefficient decreases the value and gives a better measure of the stream's overall velocity.

Velocity: This is the flow velocity and velocity units.

Flow Rate: This is either the calculated flow rate or the manually entered flow rate and flow rate units.

5.3.10 Biological Data Tab

The Biological Data tab is used to specify the information that pertains to biological media only.



Field	Input Type
Type:	Text
Tissue Type:	Text
Life Stage:	Text
Gender:	Dropdown
Volume:	Dropdown
Sample Area:	Dropdown
Lower Sample Size:	Text
Upper Sample Size:	Text
Lower Sample Weight:	Dropdown
Upper Sample Weight:	Text
Submitted Weight:	Text
Tide State:	Text
Disinfectant:	Text
Class:	Text
Order:	Text
Family:	Text
Species:	Text
Taxonomist:	Text
Taxonomic Level:	Text
Additional:	Text

The following information can be specified on this tab:

Type: This is used to select whether it is plant or animal.

Tissue Type: This is used to select the tissue type from a list of Tissue Types.

Life Stage: This is used to select the life stage from a list of Life Stages.

Gender: This is used to select whether it is female or male.

Volume: This is used to specify the volume of the sample and the volume units.

Sample Area: This is used to specify the sample area and the area units.

Lower Sample Size: This is used to specify the lower size of the sample.

Upper Sample Size: This is used to specify the upper size of the sample.

Lower Sample Weight: This is used to specify the lower sample weight.

Upper Sample Weight: This is used to specify the upper sample weight.

Submitted Weight: This is used to specify the submitted sample weight and units.

Tide State: This is used to select the tide state from a list of Tide States.

Disinfectant: This is used to select the disinfectant from a list of Disinfectants.

Class: This is used to select the Class from a list of Classes for the Plant or Animal.

Order: This is used to select the Order from a list of Orders for the selected Class.

Family: This is used to select the Family from a list of Families for the selected Order.

Species: This is used to select the Species from the list of Species for the selected Family.

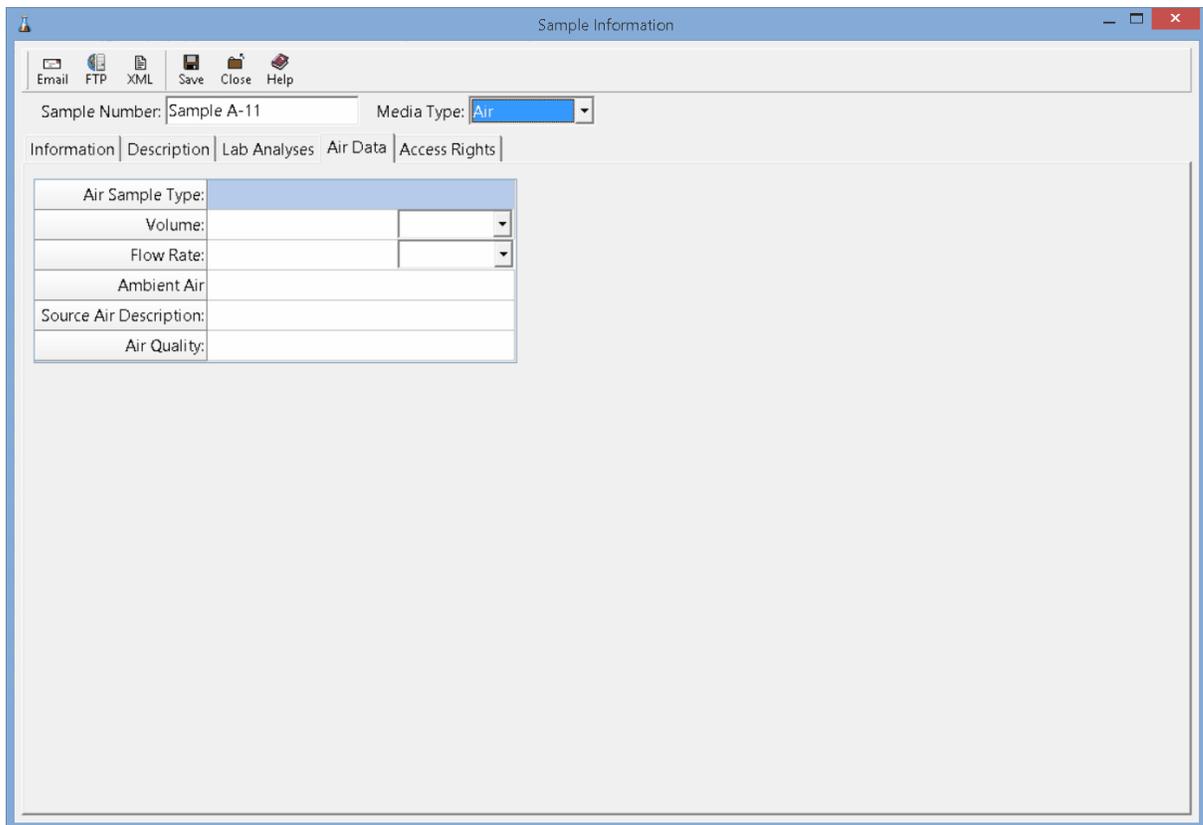
Taxonomist: This is used to select the taxonomist from the list of Personnel.

Taxonomic Level: This is used to select the taxonomic level from the list of Taxonomic Levels.

Additional Information: This is used to specify any additional information.

5.3.11 Air Data Tab

The Air Data tab is used to specify the information that pertains to air media only.



The screenshot shows a software window titled "Sample Information" with a menu bar containing "Email", "FTP", "XML", "Save", "Close", and "Help". Below the menu bar, there are two input fields: "Sample Number: Sample A-11" and "Media Type: Air" (with a dropdown arrow). Below these fields are five tabs: "Information", "Description", "Lab Analyses", "Air Data", and "Access Rights". The "Air Data" tab is currently selected and displays a table with the following fields:

Air Sample Type:	
Volume:	
Flow Rate:	
Ambient Air	
Source Air Description:	
Air Quality:	

The following information can be specified on this tab:

Air Sample Type: This is used to select the air sample type from a list of Air Sample Types.

Volume: This is used to specify the volume of the sample and the volume units.

Flow Rate: This is used to specify the flow rate for the sample and the flow rate units.

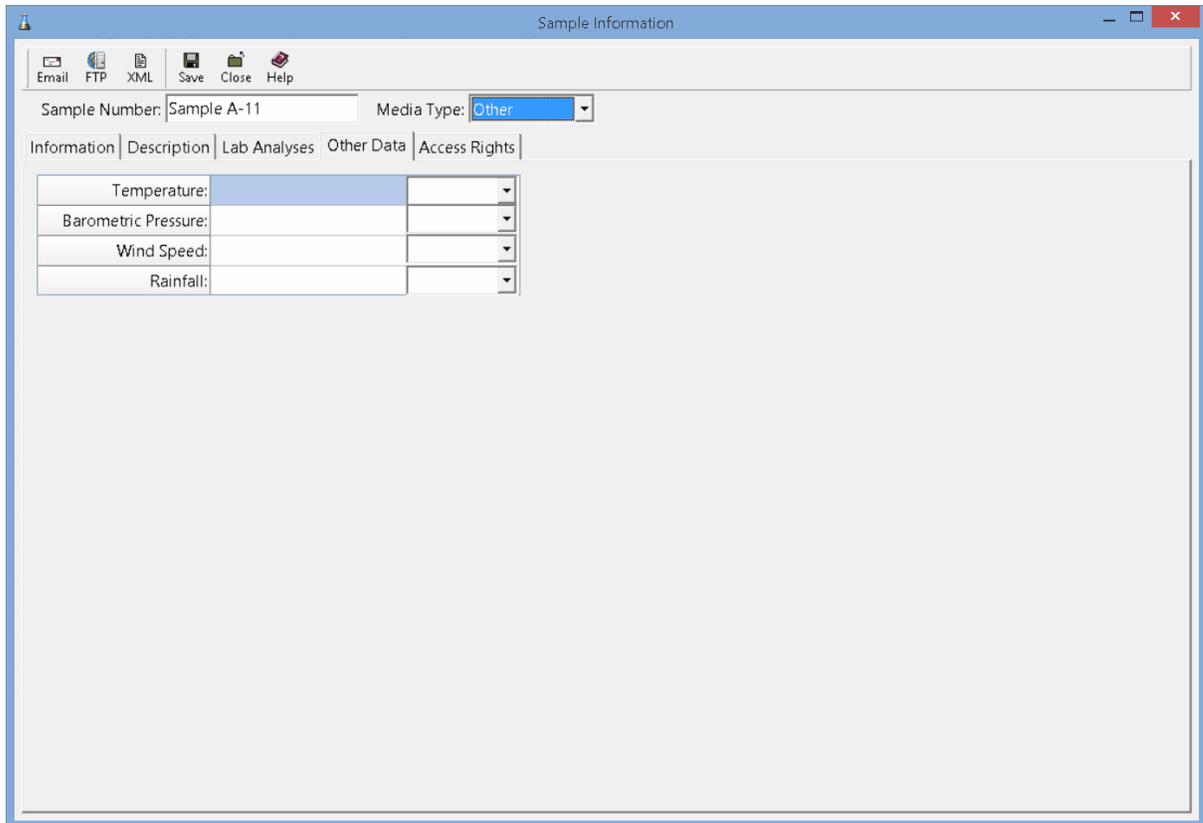
Ambient Air Description: This is used to describe the ambient air.

Source Air Description: This is used to describe the source air.

Air Quality: This is used to describe the air quality when the sample was collected.

5.3.12 Other Data Tab

The Other Data tab is used to specify the information that pertains to other media only.



Information	Description	Lab Analyses	Other Data	Access Rights
Temperature:				
Barometric Pressure:				
Wind Speed:				
Rainfall:				

The following information can be specified on this tab:

Temperature: This is used to specify the temperature and units.

Barometric Pressure: This is used to specify the barometric pressure and units.

Wind Speed: This is used to specify the wind speed and units.

Rainfall: This is used to specify the rainfall and rainfall units.

Additional Information: This is used to specify any additional information.

5.3.13 Access Rights Tab

The Access Rights tab is used to control who can view and edit the sample. If the sample was created from a task or station, this information is inherited from the task or station.

The screenshot shows a software window titled "Sample Information". At the top, there is a menu bar with options: "Email", "FTP", "XML", "Save", "Close", and "Help". Below the menu bar, there are two input fields: "Sample Number:" with the value "Sample A-11" and "Media Type:" with a dropdown menu set to "Other". Below these fields is a tabbed interface with five tabs: "Information", "Description", "Lab Analyses", "Other Data", and "Access Rights". The "Access Rights" tab is currently selected and displays the following controls: a checked checkbox labeled "Restricted", a "Type:" dropdown menu set to "Level", and a "Level:" dropdown menu set to "Power User".

The following can be edited on this tab:

Restricted: Check this box to restrict access to the sample, uncheck to not restrict access.

Type: This is used to control the type of access to the sample. Access can be controlled by either Personnel or Privilege Level. This field not appear if the Restricted box is unchecked.

Privilege Level: If the Type is set to Privilege Level, this will be visible and is used to select the privilege level required to access the sample. There are four privilege levels; administrator, power, limited, and guest. Anyone with the required or higher privilege level will be able to access the sample.

Personnel: If the Type is set to Personnel, this will be visible and is used to select the personnel that can access the sample. The personnel in the list can be added and removed using the Add and Remove buttons. When the Add button is pressed the Personnel form is displayed and the personnel can be selected as described in the [Personnel](#) section. When the Remove button is pressed the selected personnel will be removed from the list.

5.4 Deleting a Sample

An existing sample can be deleted by selecting *File > Delete > Sample*. A list of samples will then be displayed on the Delete Sample form.

Delete Sample									
Sample Number	Sample Type	QC Sample Type	Media Type	Permit	Collected	Date	Result	X-Coord.	Y-Coord.
Sample A-11	Composite		Solid	No	Yes	11/4/2014	Submitted to lab	200	400
samp2			Soil	No	No	12/30/1899		500	500
3DTest			Soil	No	Yes	10/15/2014		400	500
ss1		Original data	Groundwater	No	No	9/17/2014		451.47679	1348.1012
samp1	Undisturbed	Original data	Groundwater	No	No	2/10/2015		920.9622	1550.9737

OK Cancel Help

A sample can be selected on this form by double-clicking on it or by highlighting and pressing the Ok button. If you have access rights to the sample, the selected sample will then be deleted.

EDMS Field

User Guide

Chapter 6 Lab Analyses

Chapter 6 Lab Analyses

EDMS Field can be used to keep track of when and how a sample is sent to a lab. The analytical results obtained by the lab are not stored in EDMS Field and are sent directly to the EDMS module.

Each sample collected can have any number of lab analyses associated with it. The adding of a lab analysis to a sample is done on the [Lab Analysis tab](#)^[97] for the sample. Samples can also have no lab analyses associated and be collected for other purposes.

6.1 Adding a Lab Analysis

To add a lab analysis for a sample, [open the sample](#)⁹¹ and then click on the Add button on the [Lab Analysis tab](#)⁹⁷. A Lab Analysis form will be displayed where the data can be entered as described in the [Editing a Lab Analysis](#)¹²¹ section below.

6.2 Opening a Lab Analysis

To open an existing lab analysis for a sample, [open the sample](#)⁹¹ and then click on the Open button on the [Lab Analyses tab](#)⁹⁷. The lab analysis will then be displayed on the Lab Analysis form where the data can be edited as described in the [Editing a Lab Analysis](#)¹²¹ section below.

6.3 Editing a Lab Analysis

After a lab analysis has been created it can be edited using the Lab Analysis form. At the top of the form, the sample name/number associated with the lab analysis is shown. The form has 3 tabs for Information, Tracking, and Access Rights. The editing of these tabs is described in the sections below.

The screenshot shows a web application window titled "Lab Analysis". At the top, there are "Save", "Close", and "Help" buttons. Below them, the "Sample Number" is "Sample A-11". There are three tabs: "Information", "Tracking", and "Access Rights", with "Information" selected. The form contains several input fields and dropdown menus:

- Parameters: BTEX (dropdown)
- Matrix: Solid
- Lab Reference ID: (empty)
- Sequence #: (empty)
- COC #: (empty)
- Container: Clear glass septum vial (3)
- Container Size: 40 mL (dropdown)
- Preservative: Cool, 4°C, Na2HSO4 to pH under 2
- Arrival Temperature: (empty)
- Laboratory: ALS (dropdown)

Below these fields is a "Lookup Container" button. At the bottom, there is a table of contact information for the laboratory:

Account Number:	
Phone Number:	420 284 081 645
Fax Number:	420 284 081 635
Contact Name:	
Email:	customer.support@alsglobal.com
Street 1:	Na Harfe 336/9
Street 2:	
City:	Praque 9
State:	

6.3.1 Information Tab

The Information tab is used to specify the general information for the lab analysis.

Lab Analysis

Save Close Help

Sample Number: Sample A-11

Information Tracking Access Rights

Parameters: BTEX

Matrix:	Solid
Lab Reference ID:	
Sequence #:	
COC #:	
Container:	Clear glass septum vial (3)
Container Size:	40 mL
Preservative:	Cool, 4°C, Na ₂ HSO ₄ to pH under 2
Arrival Temperature:	

Lookup Container

Laboratory: ALS

Account Number:	
Phone Number:	420 284 081 645
Fax Number:	420 284 081 635
Contact Name:	
Email:	customer.support@alsglobal.com
Street 1:	Na Harfe 336/9
Street 2:	
City:	Praque 9
State:	

The following information can be specified on this tab:

Parameters: This is a group or parameters or individual parameter to be analysed.

Matrix: This is used to select the matrix of the sample. It can be either water, soil, rock, fluid, or solid.

Lab Reference ID: This is the reference ID for the lab analysis used by the analytical laboratory.

Sequence #: Sequence numbers are used when more than one lab analysis is done on a sample.

COC #: This is the chain of custody number for the sample.

Container: This is used to specify the type of container used for the sample. The Lookup Container button can be used to lookup the recommended container, container size, and preservative for the parameter group to be analysed. As described in the [Lookup Container](#) section below.

Container Size: This is the size and size units of the container used for the sample.

Preservative: This is the preservative used for the sample.

Arrival Temperature: This is used to specify the arrival temperature of the sample when it arrived at the lab.

Laboratory: This is used to select the laboratory that conducted the analysis.

6.3.1.1 Lookup Container

When the Lookup Container button is pressed on the Lab Analysis Information tab, the Select Parameter form below will be displayed. This form lists the recommended container type, size, preservative, and holding time for different parameters and parameter groups. Containers are added and edited in the main EDMS module. They are imported into EDMS Field when the predefined EDMS list data is imported.

When it is initially displayed the parameter group for the lab analysis will be highlighted.

Parameter /	Container	Size	Units	Preservative	Holding Time
Residual Chlorine	Glass vial with septum cap	40	mL	None	Analyze immediately
SVOCs	Amber Glass	2	L	None	14 days
Silica	Plastic	50	mL	Cool, 4°C	28 days
Solids (TS, TSS, TDS)	Plastic	500	mL	None	7 days
Sulfate	Plastic or Glass	500	mL	Cool, 4°C	28 days
Sulfide	Plastic or Glass	500	mL	Cool, 4°C, 2 mL zinc acetate + 2 N	7 days
Sulfite	Plastic or Glass	100	mL	None	Analyze immediately
Surfactants	Plastic or Glass	500	mL	Cool, 4°C	48 hours
Suspended Metals	Plastic or Glass	200	mL	HNO ₃ to pH under 2	6 months
TCDD (Dioxin)	Glass or teflon lined cups	1000	mL	Cool, 4°C, 0.008% NA ₂ S ₂ O ₂	7 days until extraction, 40 days
TOC	Plastic	250	mL	Cool, 4°C, H ₂ SO ₄ to pH under 2	10 days
Total Dissolved Mercury	Plastic or Glass	100	mL	HNO ₃ to pH under 2	28 days
Total Inorganic Nonmetallic	Plastic or Glass	50	mL	Cool, 4°C, H ₂ SO ₄ to pH under 2	28 days
Total Metals	Plastic or Glass	100	mL	HNO ₃ to pH under 2	6 months
Total Phosphorus	Plastic	250	mL	Cool, 4°C, H ₂ SO ₄ to pH under 2	30 days
Total and fecal coli	Plastic or Glass, sterile	100	mL	Cool, 4°C, 0.008% NA ₂ S ₂ O ₂	6 hours
Turbidity	Plastic or Glass	100	mL	Cool, 4°C	48 hours
pH	Plastic or Glass	25	mL	None	Analyze immediately
BTEX	Clear glass septum vial (3)	40	mL	Cool, 4°C, Na ₂ HSO ₄ to pH under 2	14 days
VOCs	Clear glass septum vial (3)	40	mL	Cool, 4°C, Na ₂ HSO ₄ to pH under 2	14 days

Ok Cancel Help

To fill in the container type, size, and preservative on the Information tab, select the parameter or parameter group being analysed and then press the Ok button.

6.3.2 Tracking Tab

The Tracking tab is used to specify tracking information for the sample from the field to the lab. At the top of the tab, the date the sample was collected is shown. This date is specified on the [Sample Information](#) form.

The screenshot shows a software window titled "Lab Analysis" with a menu bar containing "Save", "Close", and "Help". Below the menu bar, there is a "Sample Number:" field with the value "Sample A-11". A tabbed interface is visible with three tabs: "Information", "Tracking" (which is selected), and "Access Rights". Under the "Tracking" tab, there is a "Date Collected:" field with the value "11/4/2014". Below this, there is a table with four rows: "Date Shipped to Lab:", "Shipping Company:", "Shipping Method:", and "Tracking ID:". To the right of the "Shipping Company:" row, there is an "Info" button.

The following information can be entered on this tab:

Date Shipped to Lab: This is used to select the date that the sample was shipped to the lab. If a [notification](#) was specified for this event, changing the date will trigger the notification to be sent. This event can also be updated and triggered from EDMS Field.

Shipping Company: This is used to select the company used to ship the sample. When the Info button is clicked the shipping company information will be displayed as described in the [Shipping Companies](#) section below..

Shipping Method: The method used to ship the sample is selected here,

Tracking ID: This is the tracking ID for the sample shipment, usually provided by the shipping company.

6.3.2.1 Shipping Companies

When the Info button on the Tracking tab is clicked, the Shipping Companies form will be displayed. Shipping companies are added and edited in the main EDMS module. They are imported into EDMS Field when the predefined EDMS list data is imported.

Shipping Companies

Company ID: 2

Company: FedEx

Account Number: 123456

Contact Information

Contact Name: Mike Smith

Phone Number: Country Code: 0

Fax Number:

Email:

Address Information

Street 1:

Street 2:

City:

State:

Country:

Postal Code:

Ok Cancel Help

The following information is displayed on this form:

Company ID: This is a unique identification number assigned by the program and can not be edited.

Company: This is the company name.

Account Number: This is used to specify your account number with the shipping company.

Contact Name: This is the contact at the shipping company.

Phone Number: This is used to specify the phone number for the shipping company.

Country Code: This is the country calling code for the shipping company.

Fax Number: This is used to specify the fax number for the shipping company.

Email: This is used to specify the email address for the shipping company.

Street 1: This is the first line for the street address.

Street 2: This is the second line of the street address.

City: This is the city for the address of the company.

State: This is used to specify the state for the shipping company.

Country: This is the country for the shipping company address.

Postal Code: This is used to specify the postal or zip code for the shipping company.

6.3.3 Access Rights Tab

The Access Rights tab is used to control who can view and edit the lab analysis.

Lab Analysis

Save Close Help

Sample Number: Sample A-11

Information Tracking Access Rights

Inherit From Sample

Restricted Type: Personnel

Restricted to Personnel

Last Name	First Name

+ Add - Remove

The following can be edited on this tab:

Inherit from Sample: Check this box to inherit the access rights from the sample.

Restricted: If not inherited from the sample, check this box to restrict access to the lab analysis, uncheck to not restrict access.

Type: This is used to control the type of access to the lab analysis. Access can be controlled by either Personnel or Privilege Level. This field not appear if the Restricted box is unchecked.

Privilege Level: If the Type is set to Privilege Level, this will be visible and is used to select the privilege level required to access the lab analysis. There are four privilege levels; administrator, power, limited, and guest. Anyone with the required or higher privilege level will be able to access the lab analysis.

Personnel: If the Type is set to Personnel, this will be visible and is used to select the personnel that can access the lab analysis. The personnel in the list can be added and removed using the Add and Remove buttons. When the Add button is pressed the [Personnel](#) form is displayed and the personnel can be selected. When the Remove button is pressed the selected personnel will be removed from the list.

6.4 Deleting a Lab Analysis

An existing lab analysis can be deleted from a sample by [opening the sample](#) and then selecting the lab analysis on the [Lab Analysis tab](#) of the sample and clicking on the Delete button.

EDMS Field

User Guide

Chapter 7 Sending and Receiving Data

Chapter 7 Sending and Receiving Data

Task, project and sample data can be sent and received between EDMS Field and the GaeaSynergy network application. This enables data to be collected in the field with EDMS Field and then sent and uploaded automatically by the GaeaSynergy network in the office. In addition, tasks, projects and templates can be sent from the GaeaSynergy network and then uploaded automatically by EDMS Field.

The settings for the GaeaSynergy service email address and FTP site are specified on the [Internet tab](#) in Preferences.

Preferences

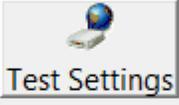
Basic | **Internet** | Tasks | Company Info

Incoming Email Settings

Host: Port: Use TLS / SSL

Username:

Password:

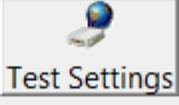
 Test Settings

Outgoing Email Settings

Host: Port: Use TLS / SSL

Username:

Password:

 Test Settings

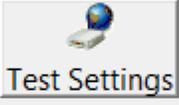
Service Settings

Email:

FTP Server: Port:

User Name:

Password:

 Test Settings

7.1 Importing Tasks

EDMS Field can automatically receive tasks from the GaeaSynergy network application by email or FTP. These tasks will be automatically loaded when the EDMS Field program is started. To send the task data to EDMS Field it must be specified in the notifications for the task in GaeaSynergy.

Notification

Event:

Notification Method:

Personnel	Last Name	First Name
	Mike	Fraser

Timing

Hours: Before

Days:

EDMS Field

Send to EDMS Field

By email
 By FTP

7.2 Importing Projects

EDMS Field can automatically receive projects from GaeaSynergy via email or FTP. To use this feature, the network version of GaeaSynergy must be installed and the GaeaSynergy Service running. The projects sent from GaeaSynergy will then be imported when the EDMS Field application is started.

When sending the project from the GaeaSynergy network, the User Name and Personnel ID to receive the project must be specified. In EDMS Field, the User Name and Personnel ID for receiving projects is specified on the Company tab of Preferences.

Preferences

Basic	Internet	Tasks	Contact Info
-------	----------	-------	--------------

Username:

Personnel ID:

Contact Information

Contact Name:

Company:

Phone Number: Country Code

Fax Number:

Email:

Street 1:

Street 2:

City:

State:

Country:

Postal Code:

7.3 Importing Lookup Lists

WinLoG RT can automatically receive lookup lists from GaeaSynergy via email or FTP. To use this feature, the network version of GaeaSynergy must be installed and the GaeaSynergy Service running. If the lookup list is sent via email it will be imported when the WinLoG RT application is started.

To import the lookup list via FTP select *File > Import > Lookup Lists > From FTP Service*. The lookup list will then be imported from the GaeaSynergy site specified on the Internet tab in Preferences.

Preferences

Basic	Internet	Tasks	Company Info
-------	----------	-------	--------------

Incoming Email Settings

Host: Port: Use TLS / SSL

Username:

Password:


Test Settings

Outgoing Email Settings

Host: Port: Use TLS / SSL

Username:

Password:


Test Settings

Service Settings

Email:

FTP Server: Port:

User Name:

Password:


Test Settings

7.4 Exporting Projects

Projects can be exported from WinLoG RT and then imported into GaeaSynergy by email or FTP. Before exporting the project must be opened. To export the project either select *File > Export > Project > To Service Email* or *File > Export > Project > To Service FTP*. The project will then be exported and uploaded to the GaeaSynergy site specified on the Internet tab in Preferences. The GaeaSynergy service will then automatically import the project.

Preferences

Basic	Internet	Tasks	Company Info
Incoming Email Settings			
Host:	<input type="text"/>	Port:	110 <input type="checkbox"/> Use TLS / SSL
Username:	<input type="text"/>		
Password:	<input type="text"/>		Test Settings
Outgoing Email Settings			
Host:	<input type="text"/>	Port:	26 <input type="checkbox"/> Use TLS / SSL
Username:	<input type="text"/>		
Password:	<input type="text"/>		Test Settings
Service Settings			
Email:	<input type="text"/>		
FTP Server:	<input type="text"/>	Port:	21 
User Name:	<input type="text"/>		Test Settings
Password:	<input type="text"/>		
<input type="checkbox"/> Ok		<input type="checkbox"/> Cancel	
<input type="checkbox"/> Help			

7.5 Exporting Stations

Individual stations can be exported to the GaeaSynergy network using email or FTP. In addition, they can be exported to an XML file. To export a station, open the station and click on either the Email, FTP, or XML button at the top of the form.

The screenshot shows the 'Station Information' window. At the top, there is a toolbar with icons for Labels, COC, Email, FTP, XML, Save, Close, and Help. Below the toolbar, the 'Station Name' is 'Station A-1', 'X Coordinate' is '920.9622', and 'Y Coordinate' is '1550.9737'. The 'Information' tab is selected, showing a table of station details:

Description:	
Required for Permit:	No
Station Type:	Monitoring Well
Purpose:	
Date Created:	12/30/1899
Elevation:	101 meters
Elevation Method:	GPS Carrier Phase Kinematic Relative Positioning
Elevation Datum:	Elevation from Mean Sea Level
Alternate X-Coordinate:	0 meters
Alternate Y-Coordinate:	0
Survey Method:	GPS Carrier Phase Kinematic Relative -
Survey Accuracy:	0.1 meters
Survey Datum:	ETRS89
Data Source:	
Source Scale:	None
Reference Point:	NE Corner of Land Parcel
Within Site Boundary:	No
Station Construction:	
Station Decommissioning:	

Below the table, there is a 'Station' section with a 'Date' field set to '11/1/2014'. At the bottom, the 'Associated Boring/Well' is 'E101' with a 'Link' button.

When sending the station by email or FTP to the GaeaSynergy network, the service settings in Preferences are used.

7.6 Exporting Samples

Individual samples can be exported to the GaeaSynergy network using email or FTP. In addition, they can be exported to an XML file. To export a sample, open the sample and click on either the Email, FTP, or XML button at the top of the form.

The screenshot shows the 'Sample Information' window with the following data:

Sample Type:	Composite
Continuous:	No
Required for Permit:	No
Purpose:	
Location:	
X Coordinate:	200
Y Coordinate:	400
Elevation:	102 meters
Collection Method:	Hand-held Sampler
Methodology:	D4700-91(2006)
Variations:	
Sampling Result:	Submitted to lab
Sampling Company:	
Sources of Environmental Risk:	
Weather:	
Field Comments:	
Additional Comments:	
Number of Composites:	0

Additional form fields and controls:

- Sample Number: Sample A-11
- Media Type: Solid
- Station: [Empty]
- Task: [Empty]
- Buttons: Email, FTP, XML, Save, Close, Help
- Associated Boring/Well: E105
- Link button
- Collected:
 - Sample Date: 11/4/2014
 - Specify Time: No
- Sample:
 - Date Uploaded: 11/1/2014

When sending the sample by email or FTP to the GaeaSynergy network, the service settings in Preferences are used.

