SAMS XC

Universal Tester Portal

Training Manual

Job Aid Prepared by

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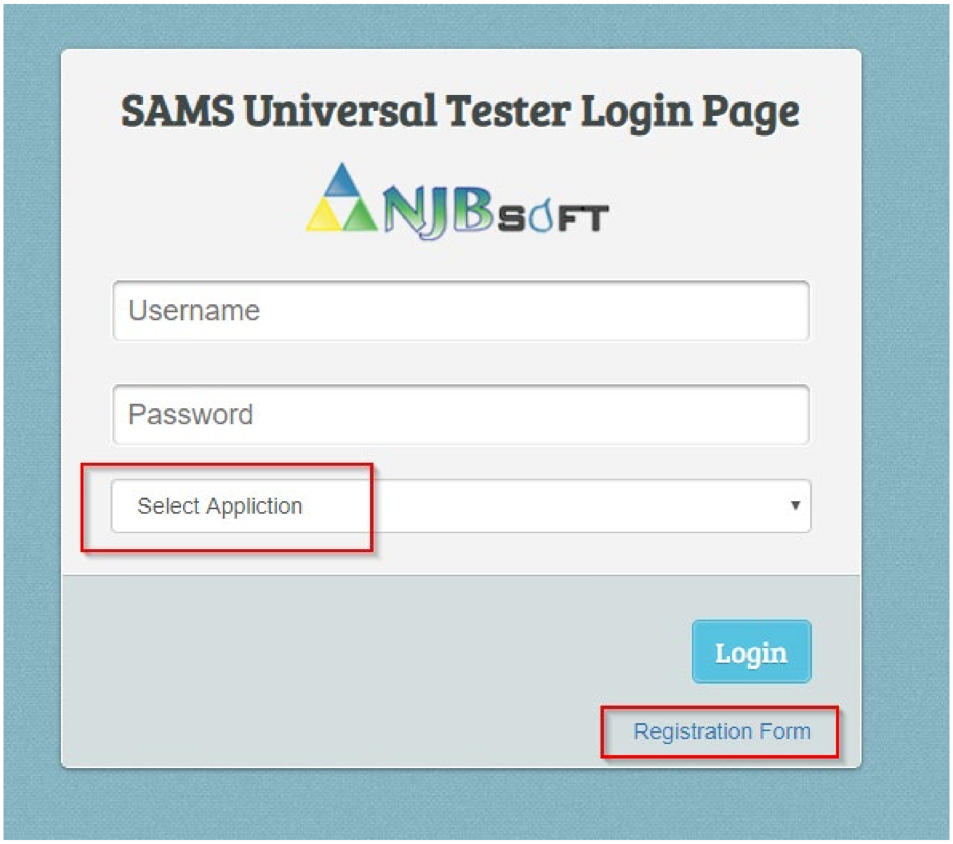
Revision History

Date	Revision By	Revision Info
4/10/2019	NJBSoft	Document created
7/5/2019	NJBSoft	Document modified
12/13/2019	NJBSoft	Document modified

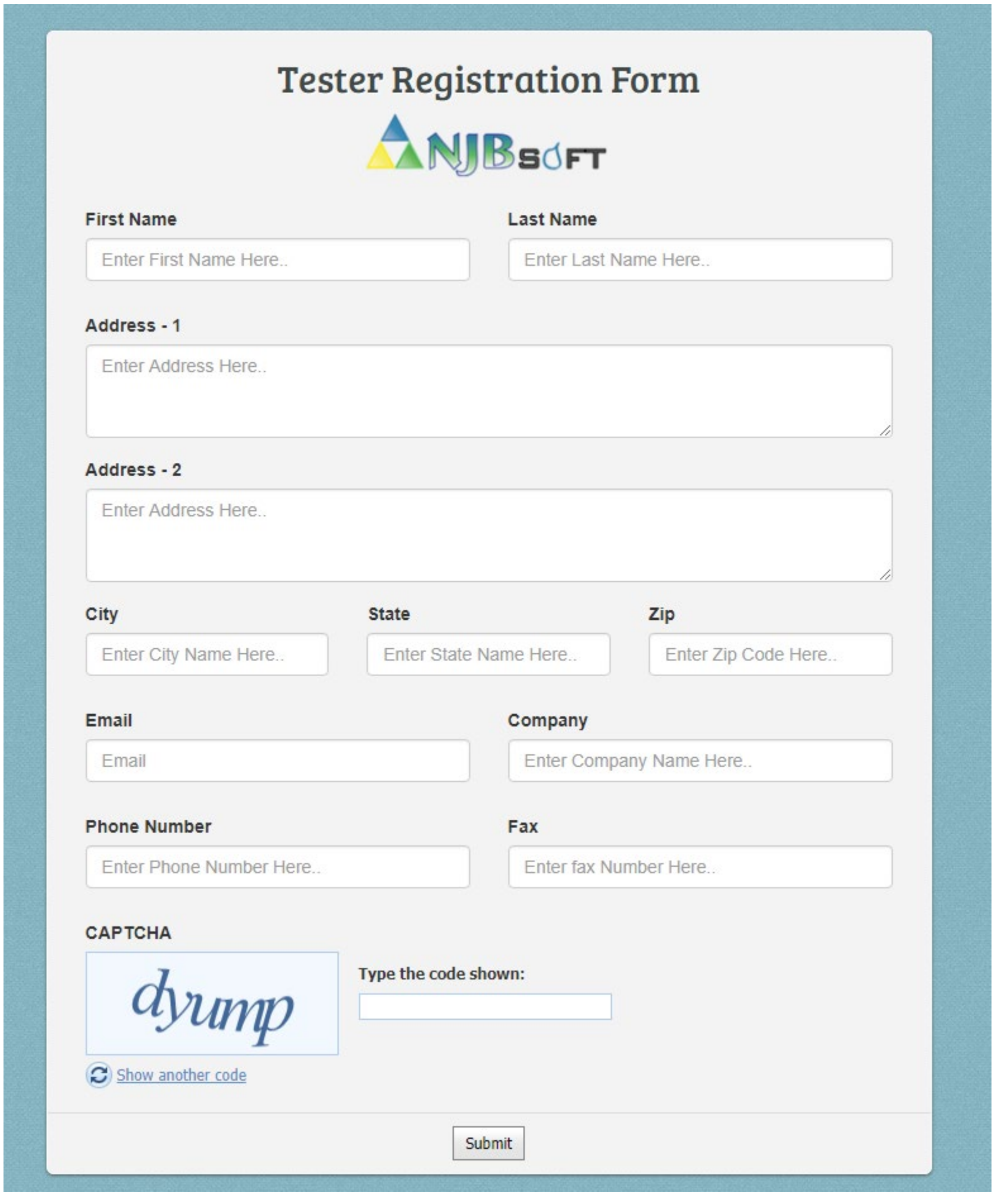
Registering for SAMS Universal Portal

On the login page, select a city and click on "Registration form" to register as a user.



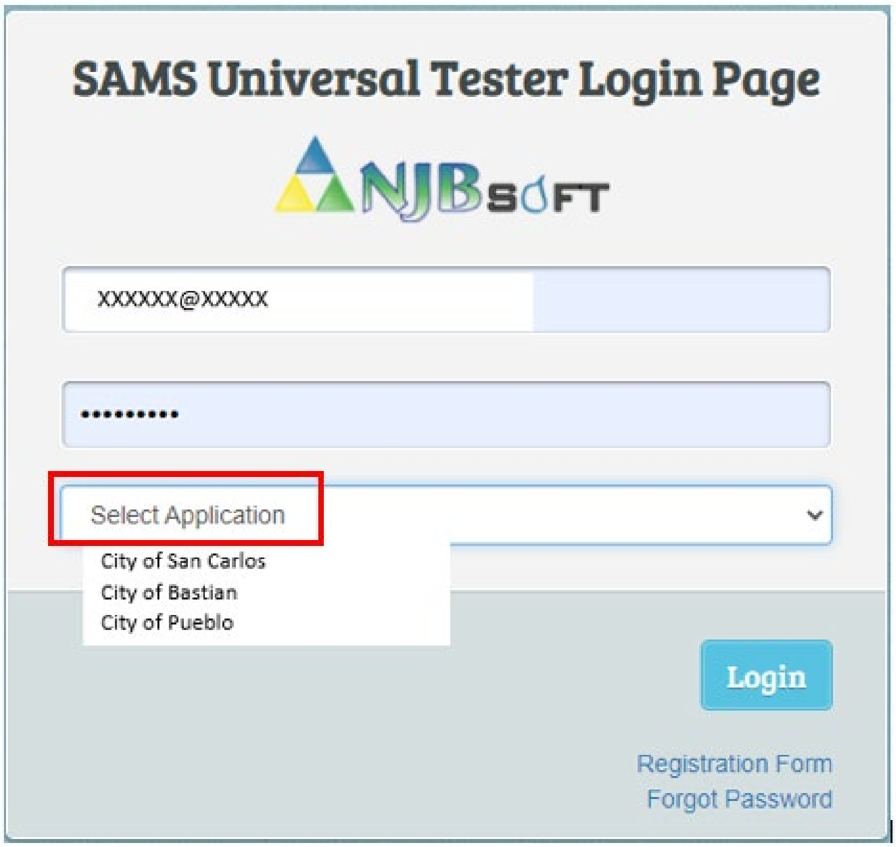
The user will be taken to the Registration form where all details for the tester can be entered.

After all details are entered, click on the Submit button and the registration form will be sent to the jurisdiction for approval.

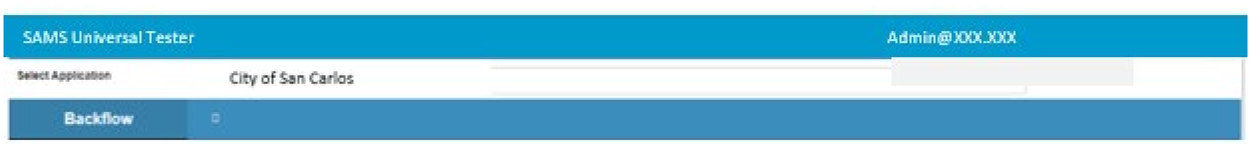


Logging into SAMS Universal Portal

Once approved by the jurisdiction, the URL to SAMS Universal Portal and password will be sent by email. Login using the information and "Select Application". This is the jurisdiction where test reports, tester, or company information are entered.



Once in the portal, the chosen jurisdiction will be in the drop down.

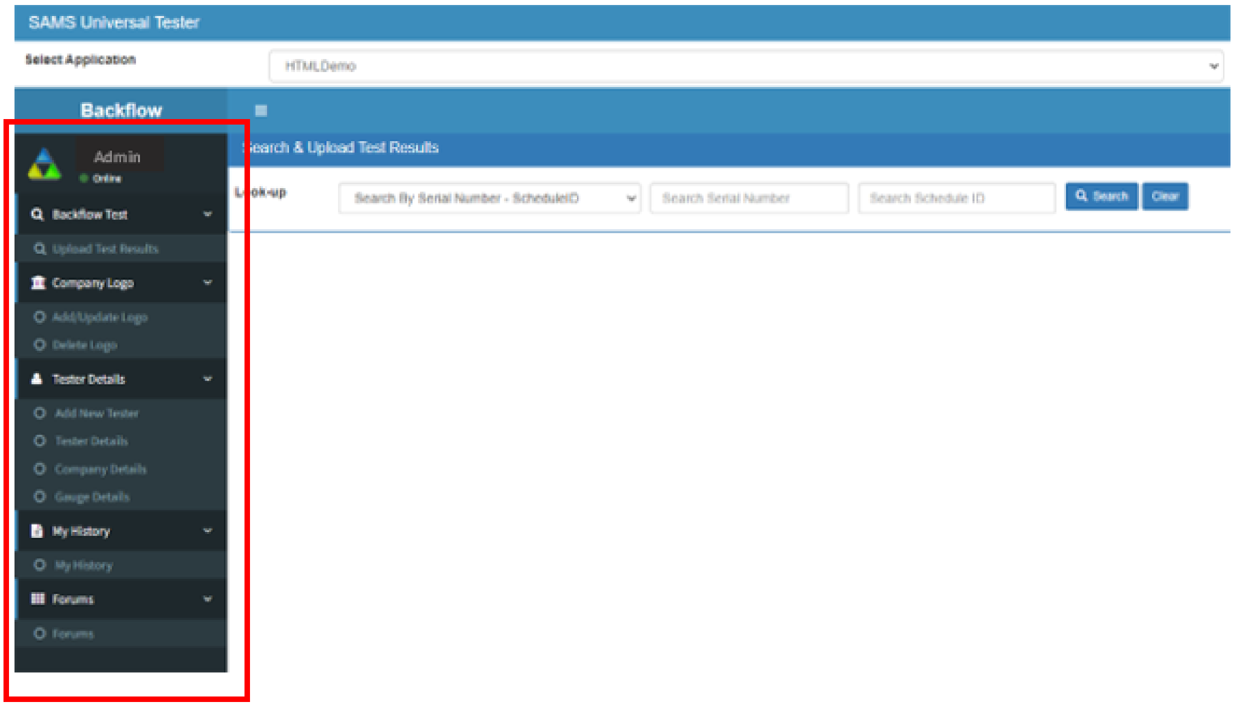


If a user wishes to select another city to enter test results, click "Select Application" on the dropdown on the top of the page and select the city.

The user will be taken to the City's tester portal page.

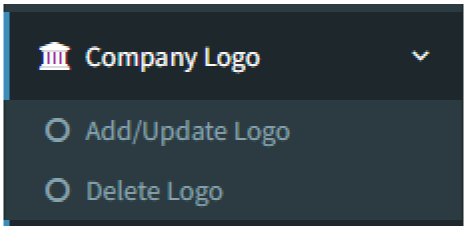
Getting Started

The main menu of the portal is the left side. The portal defaults to the “Search & Upload Test Results” page. This is where test reports are entered.

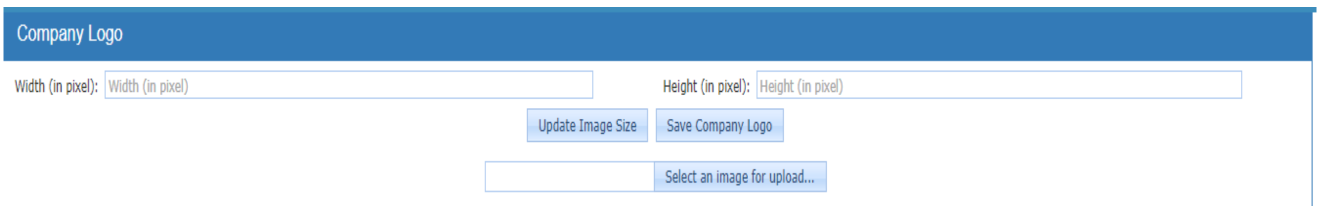


Creating and Uploading a Company Logo

The Company Logo can be uploaded and will be on all test reports that are generated in SAMS Universal Portal. To add the company logo, click on “Add/Update Logo”.

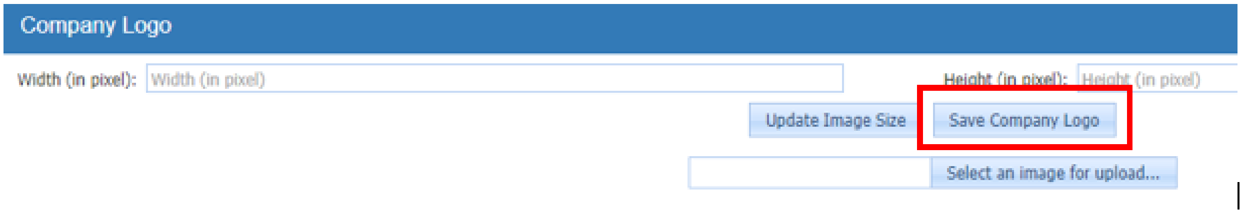


The Company Logo screen will pop up.

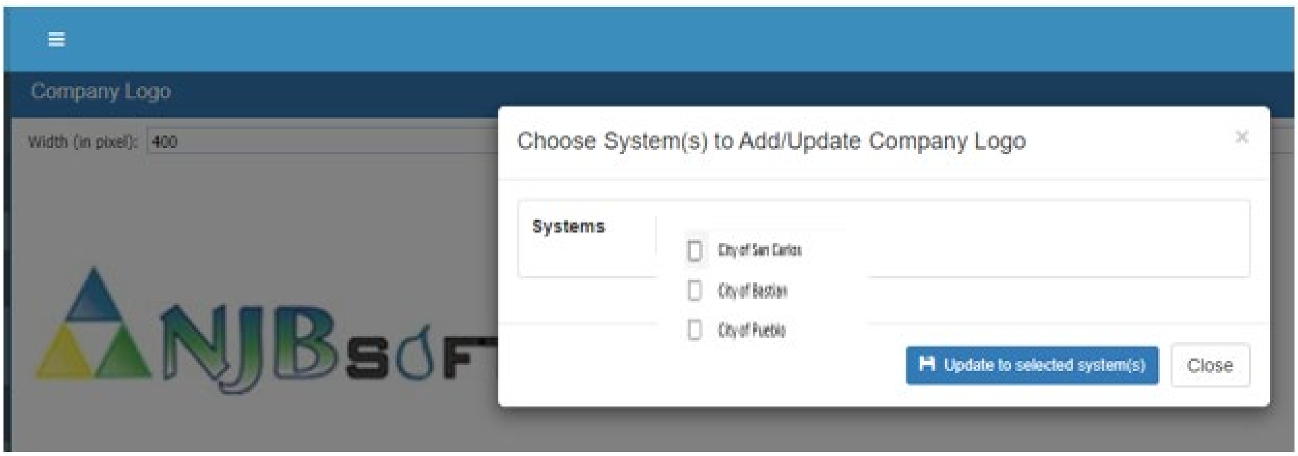


Enter Width, Height and “Select an image for upload”. The logo is uploaded.

By clicking on the “Save Company Logo” a pop up will appear. Click on “Update to selected systems”. The drop down has other jurisdictions that the user can send their information to. This eliminates the need to enter the information numerous times.

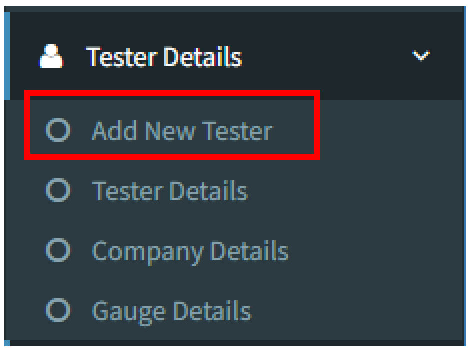


In the drop down under “Systems” click on the jurisdictions that the information is to be sent to for approval. When done close window.

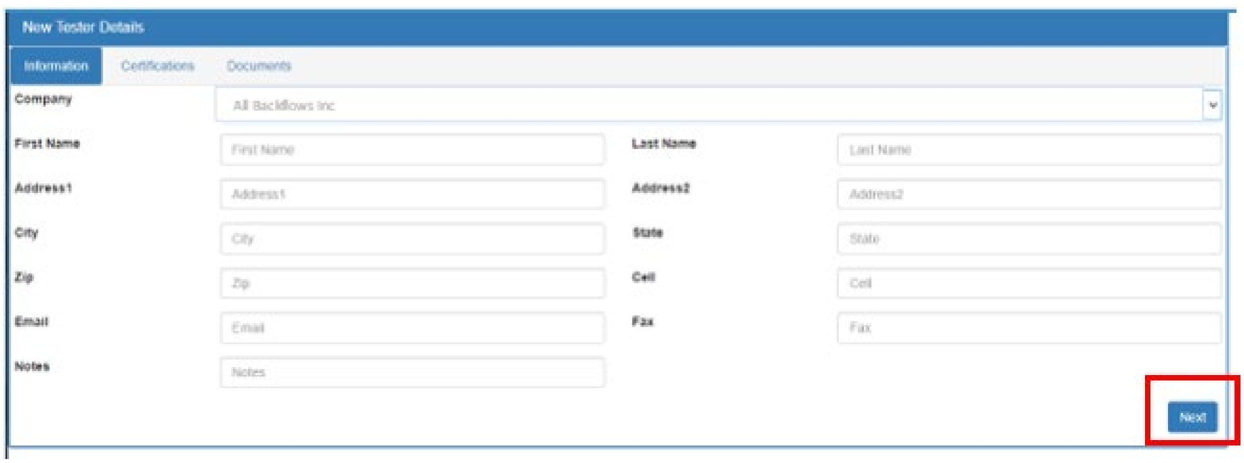


Adding and Updating Testers

Tester Details enables the user to enter add a new tester, gauge, add or edit company details.

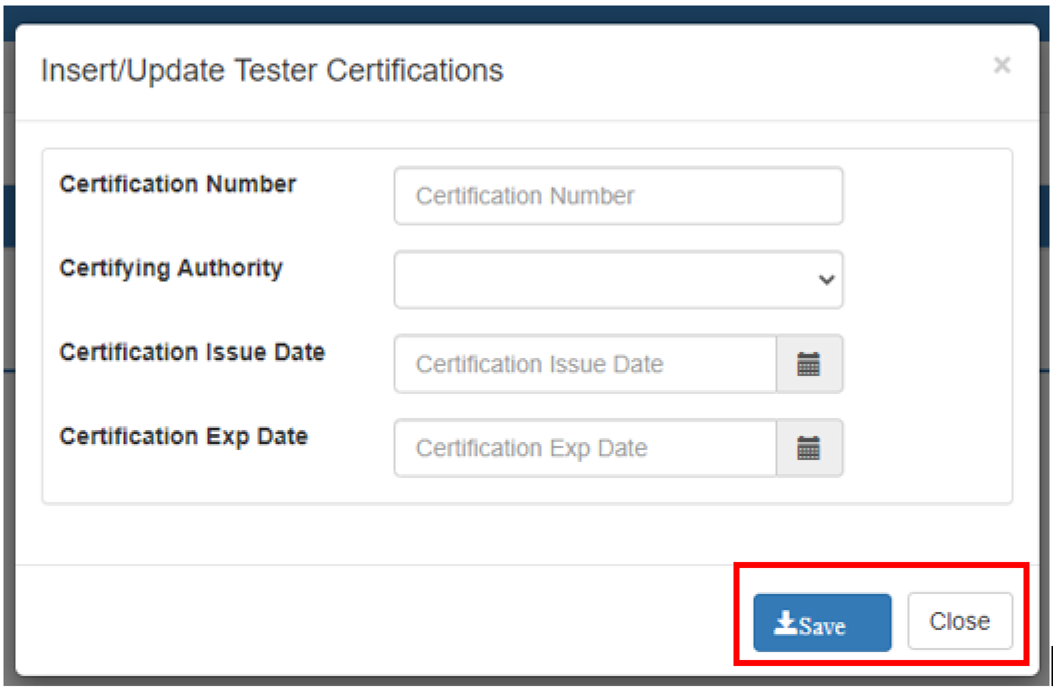


To add an new tester, Click on "Add New Tester" from Tester Details. Add the tester name, address, city, zip, etc. When done click "Next".

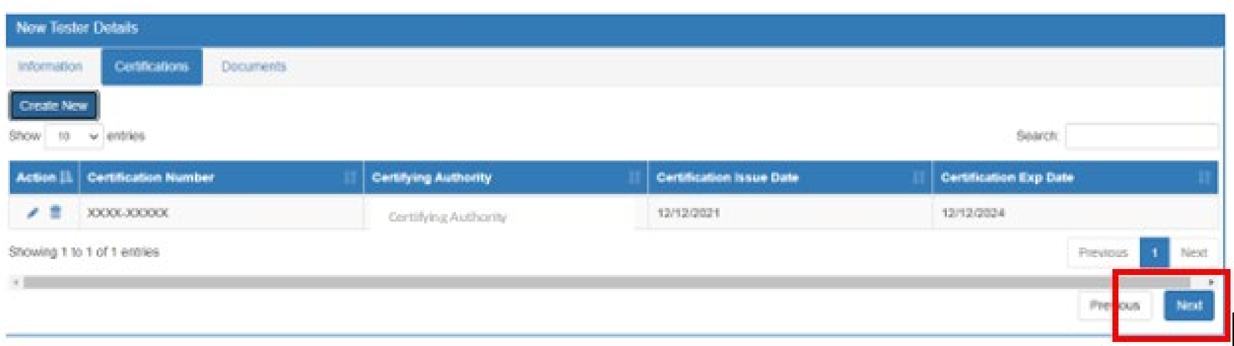


Click on "Create New".

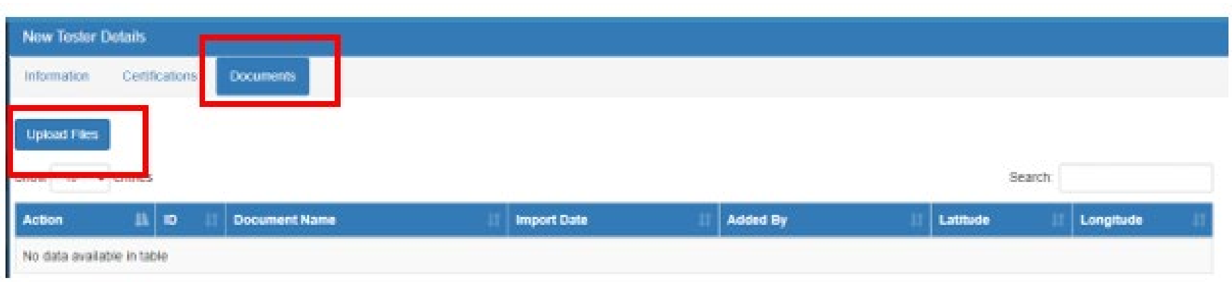
The “Insert/Update Tester Certifications” will pop up. Fill in the tester’s certification information. When done click “Save” and close.



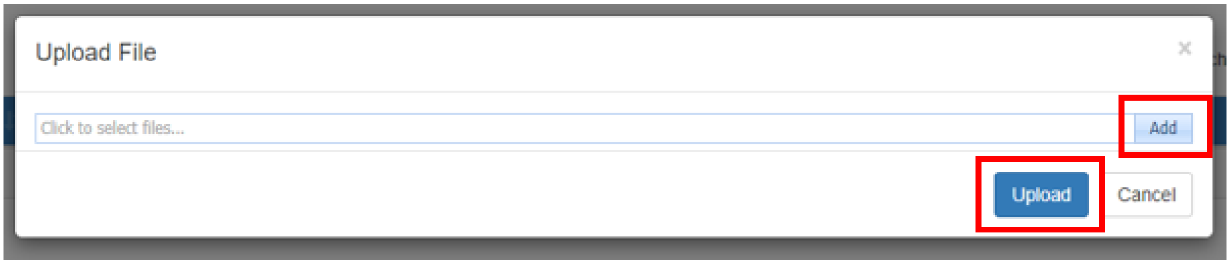
The information has been entered, click “Next”.



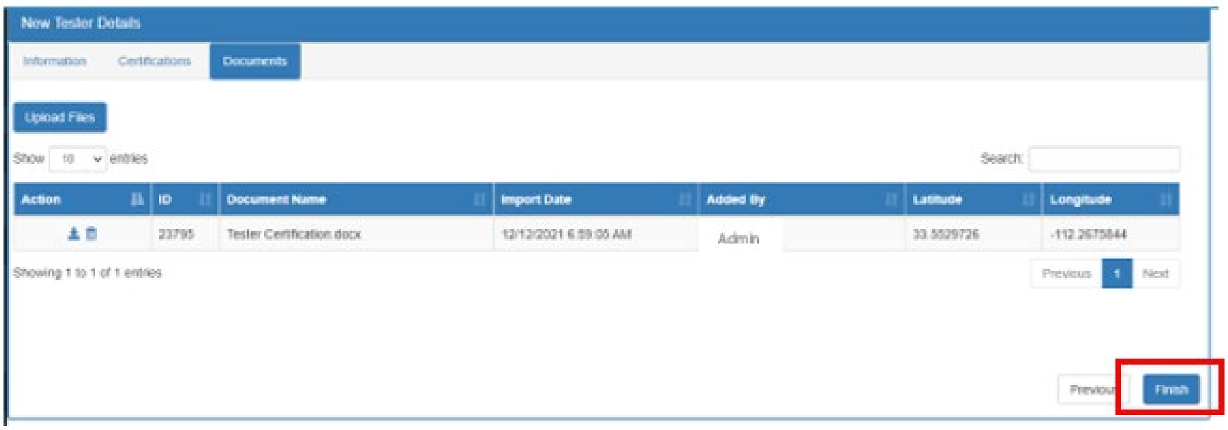
Upload the tester certification into the “Document” tab. Click “Upload Files”.



The “Upload File” pops up. Click on “Add”, choose file, and click “Upload”.

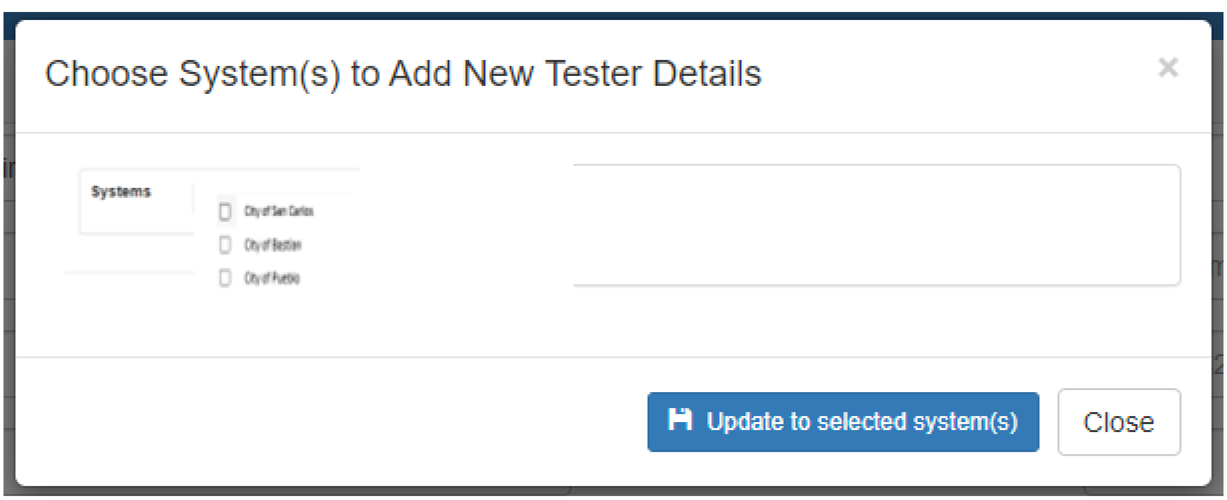


The file has been successfully uploaded. Click “Finish” on the bottom right of the screen.



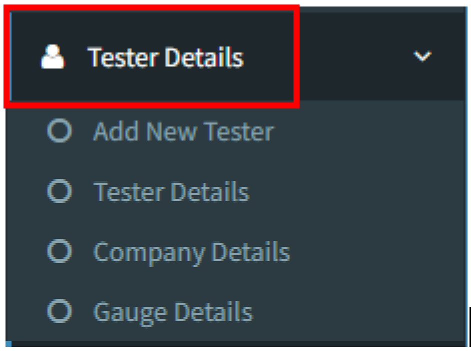
“Choose System (s) to Add New Tester Details” will pop up. When the drop down under “Systems” is clicked the user will be given a menu of other jurisdictions to choose from. When chosen, the tester will automatically be sent to the other jurisdictions for approval. This eliminates the need to enter it numerous times.

When done close the window.

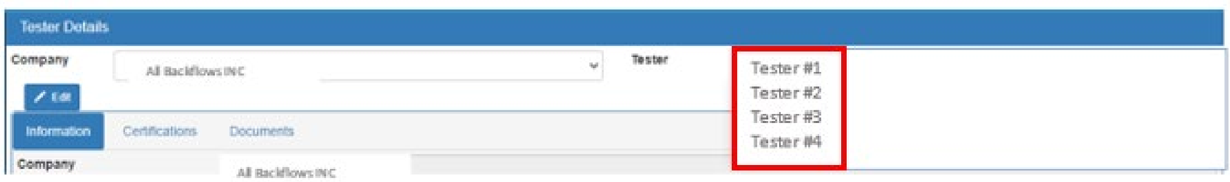


Updating Tester Information

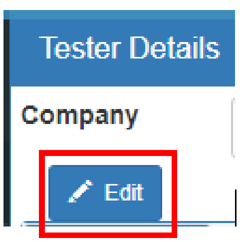
“Tester Details” enables the user to update any tester within their company. Click “Tester Details”.



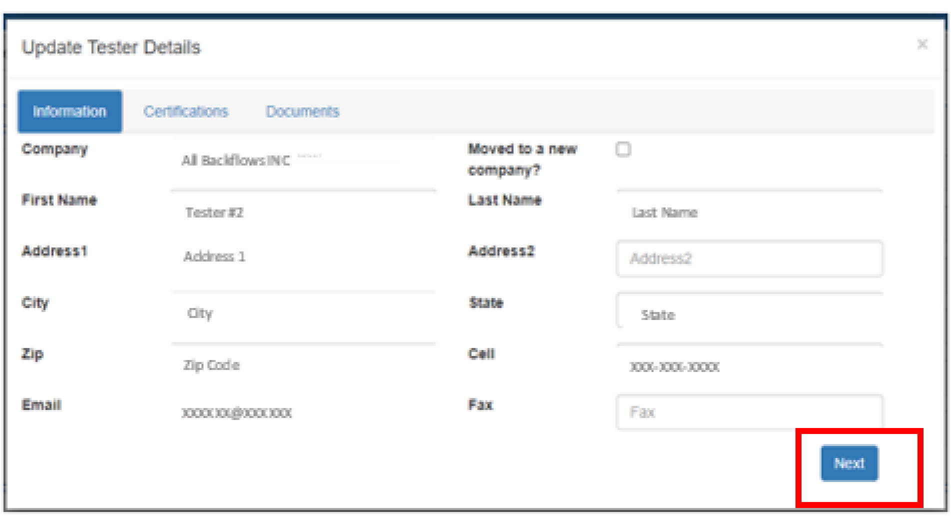
Choose the tester to update from the drop-down list.



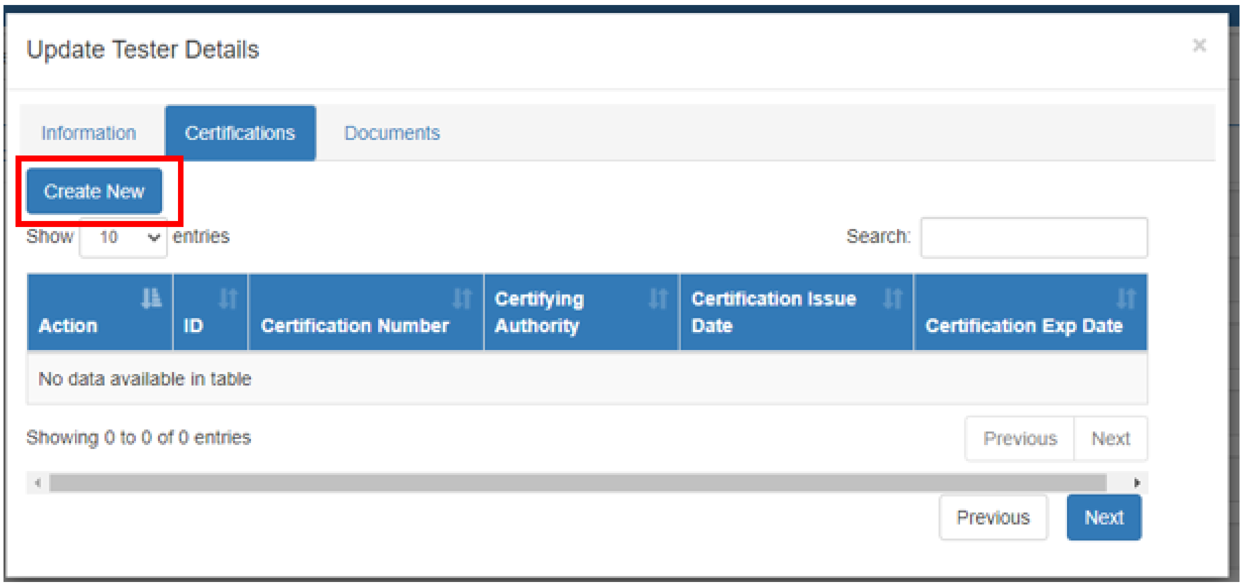
Under “Tester Details” click “Edit”.



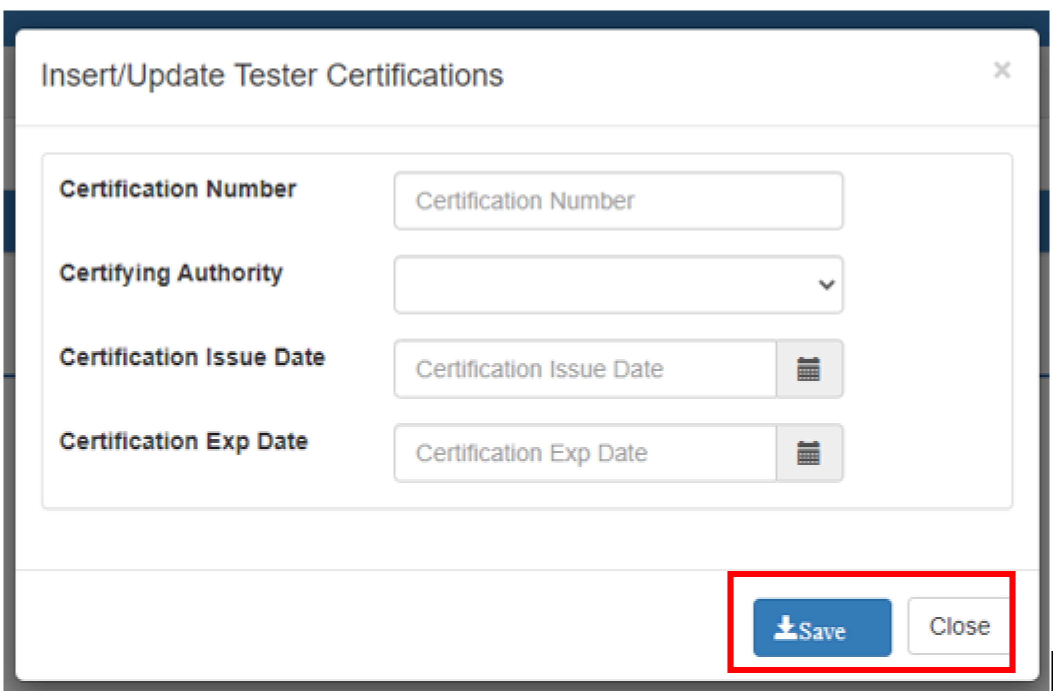
The “Update Test Details” will pop up with the current tester information. Click “Next”.



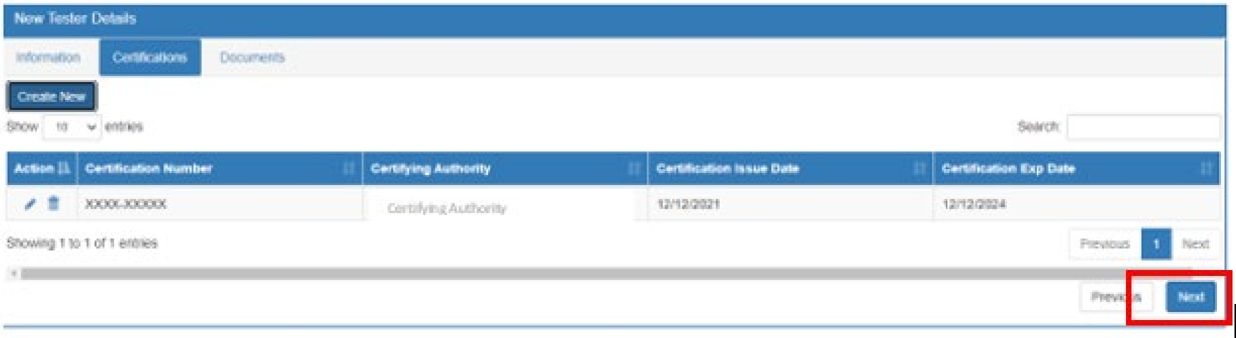
The “Update Tester Details” pops up. Click “Create New”.



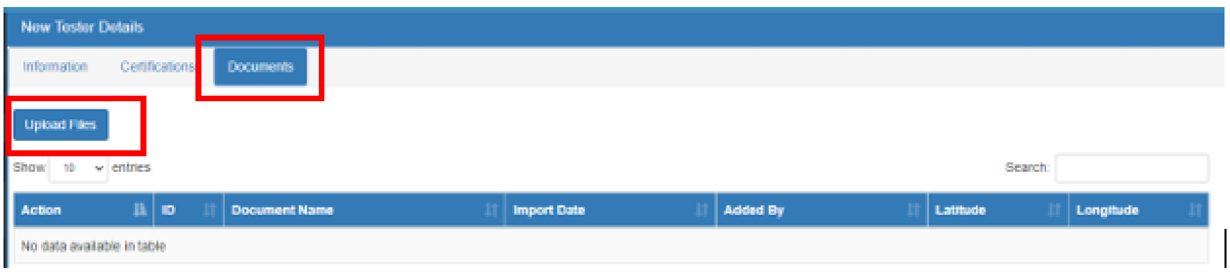
The “Insert/Update Tester Certifications” will pop up. Fill in the tester’s certification information. When done click “Save” and close.



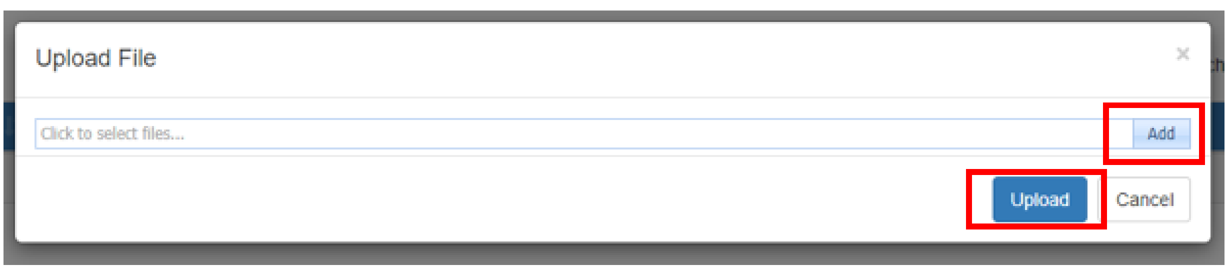
The information has been successfully entered, click “Next”.



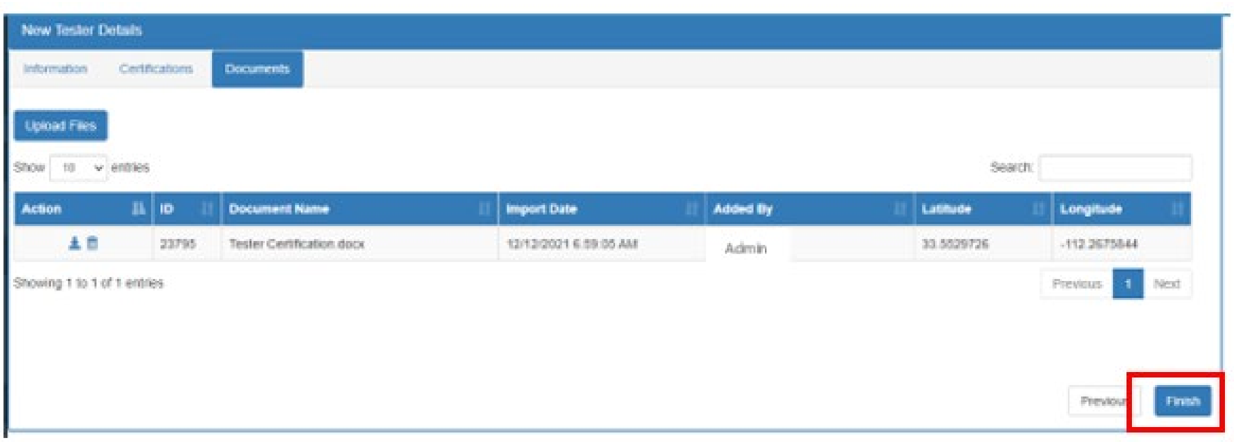
To upload the tester certification, click the “Document” tab, and click “Upload Files”.



From the “Upload File” window, Click “Add”, choose file, and click “Upload”.

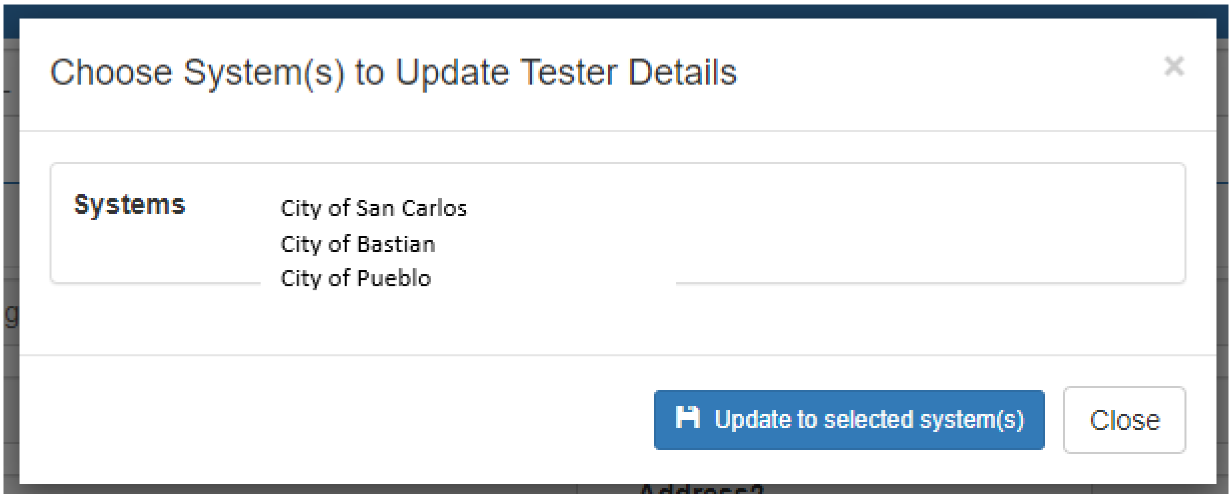


The file has been successfully uploaded. Click “Finish” on the bottom right of the screen.



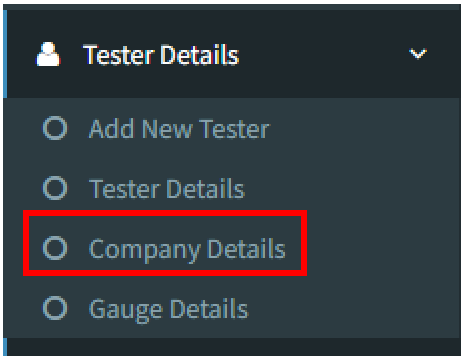
"Choose System (s) to Update Tester Details" will pop up. When the drop down under "Systems" is clicked the user will be given a menu of other jurisdictions to choose from, click the jurisdiction. When chosen, the tester information will be sent to the other jurisdictions for approval, eliminating the need to enter it numerous times.

When done close window.

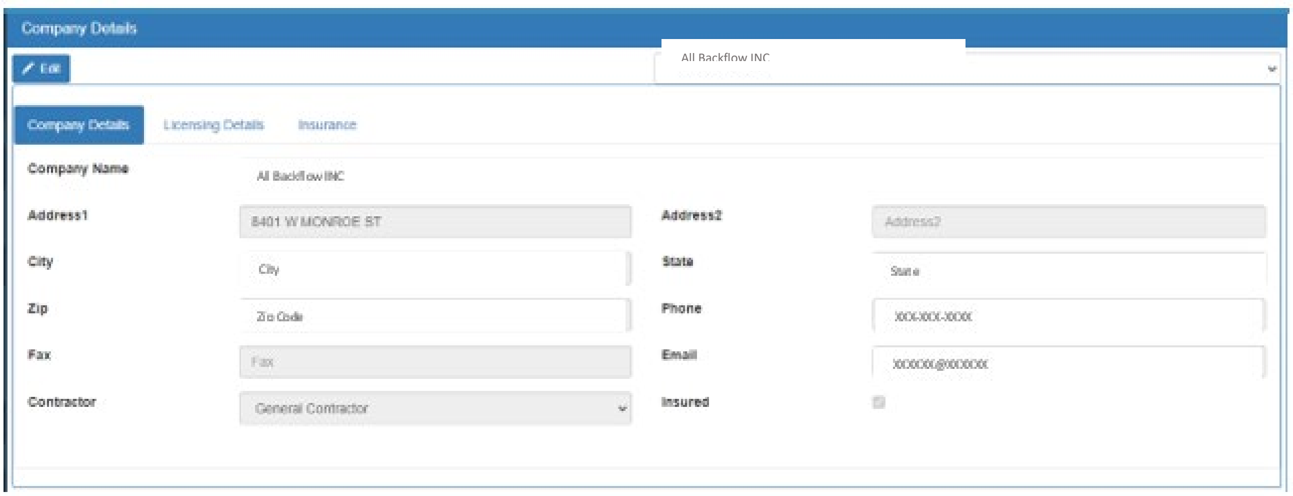


Updating Company Information

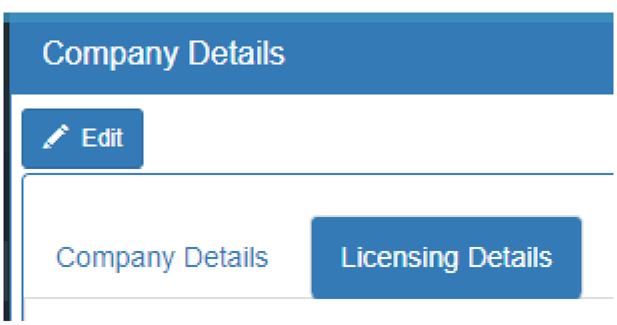
To update company details, click on “Company Details”.



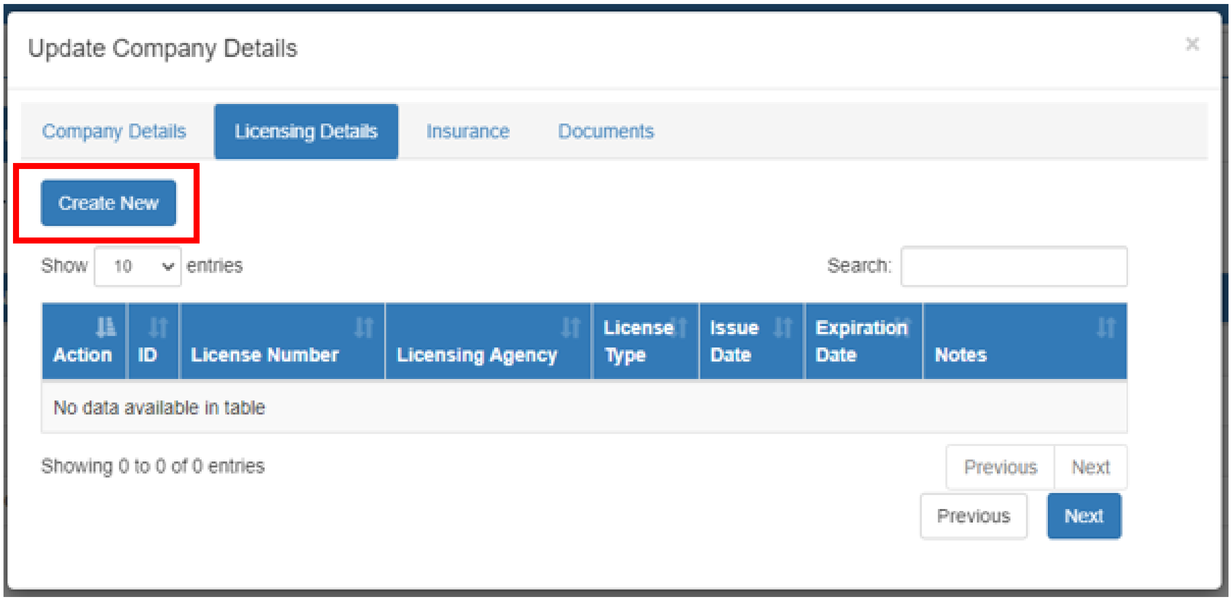
“Company Details” will pop up.



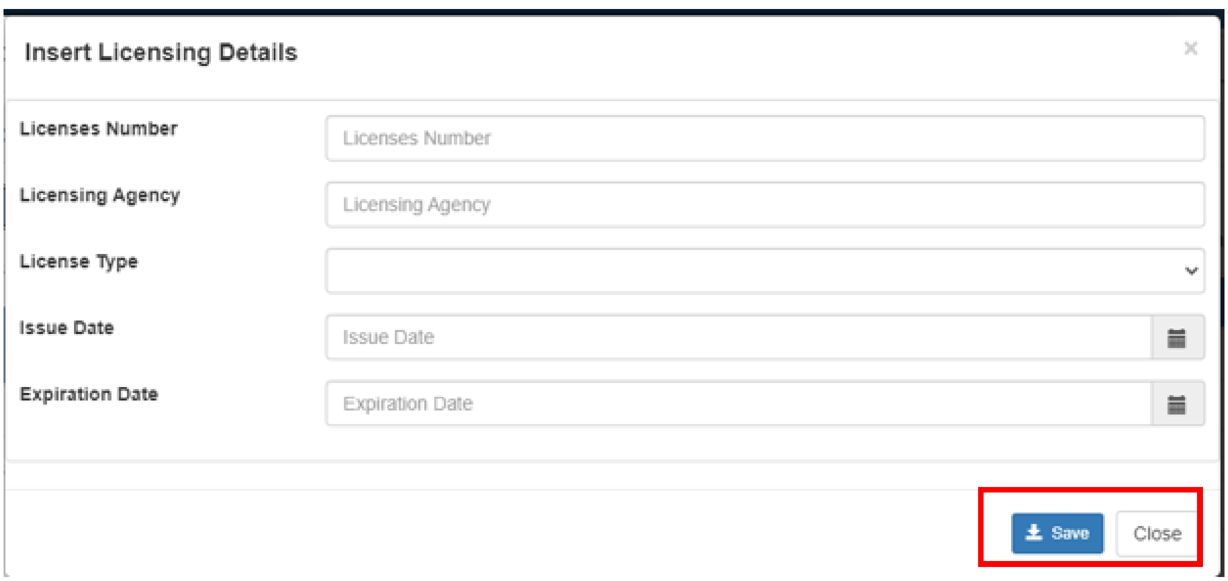
Click “Edit” above the “Licensing Details”.



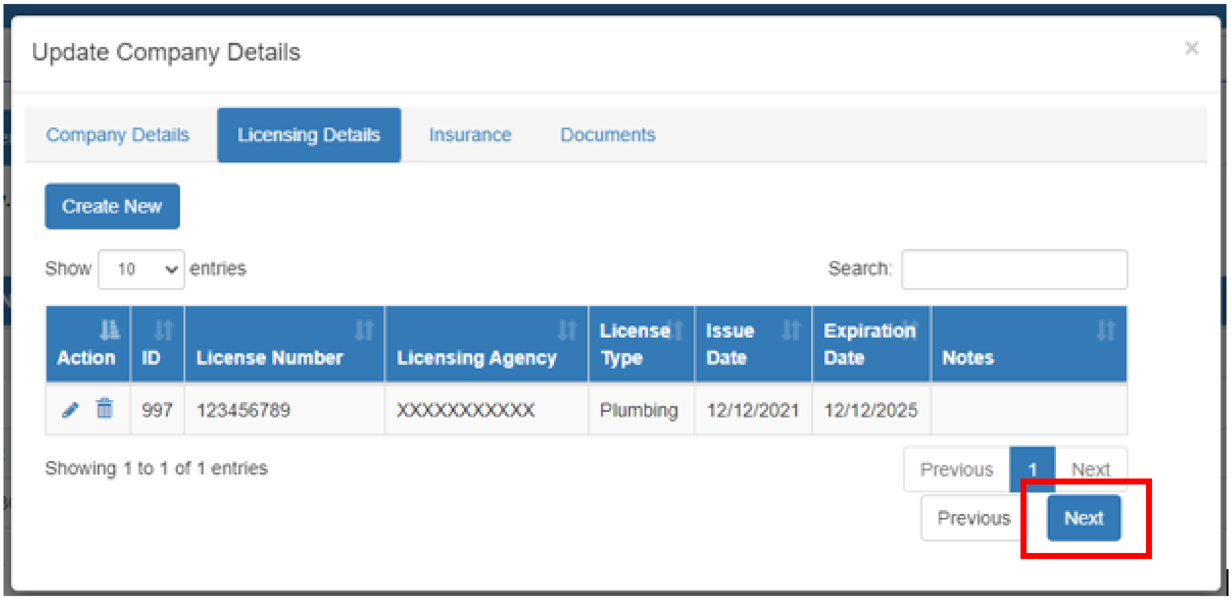
Click “Create New” to update the company license information.



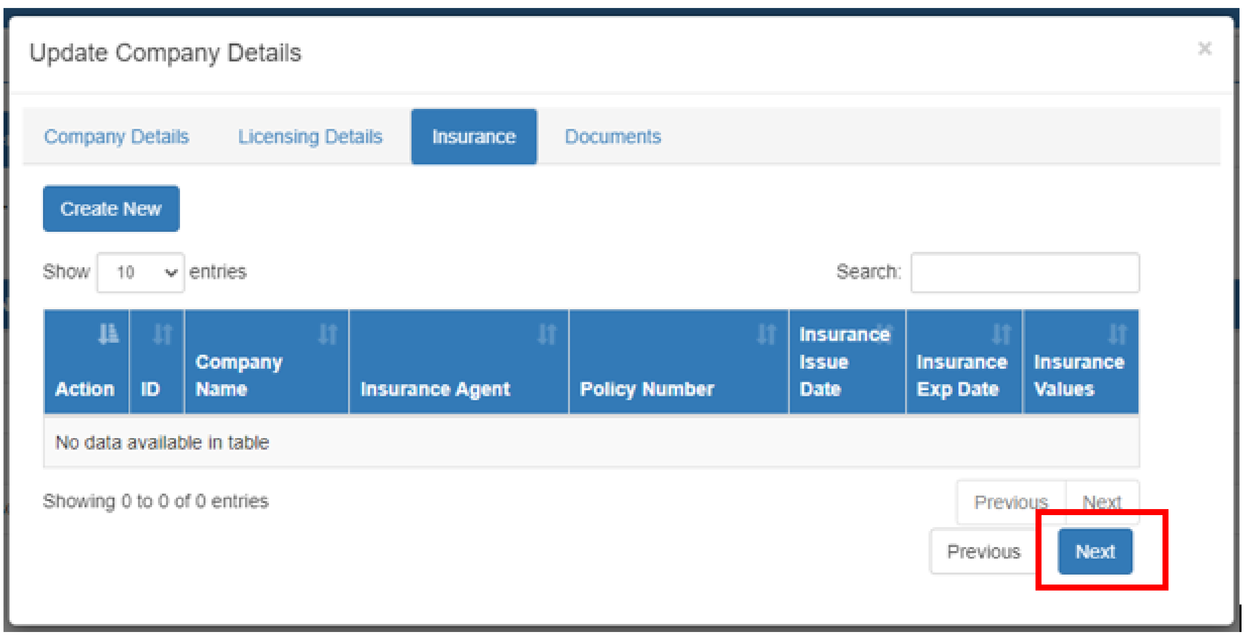
Enter the information, click “Save” and close.



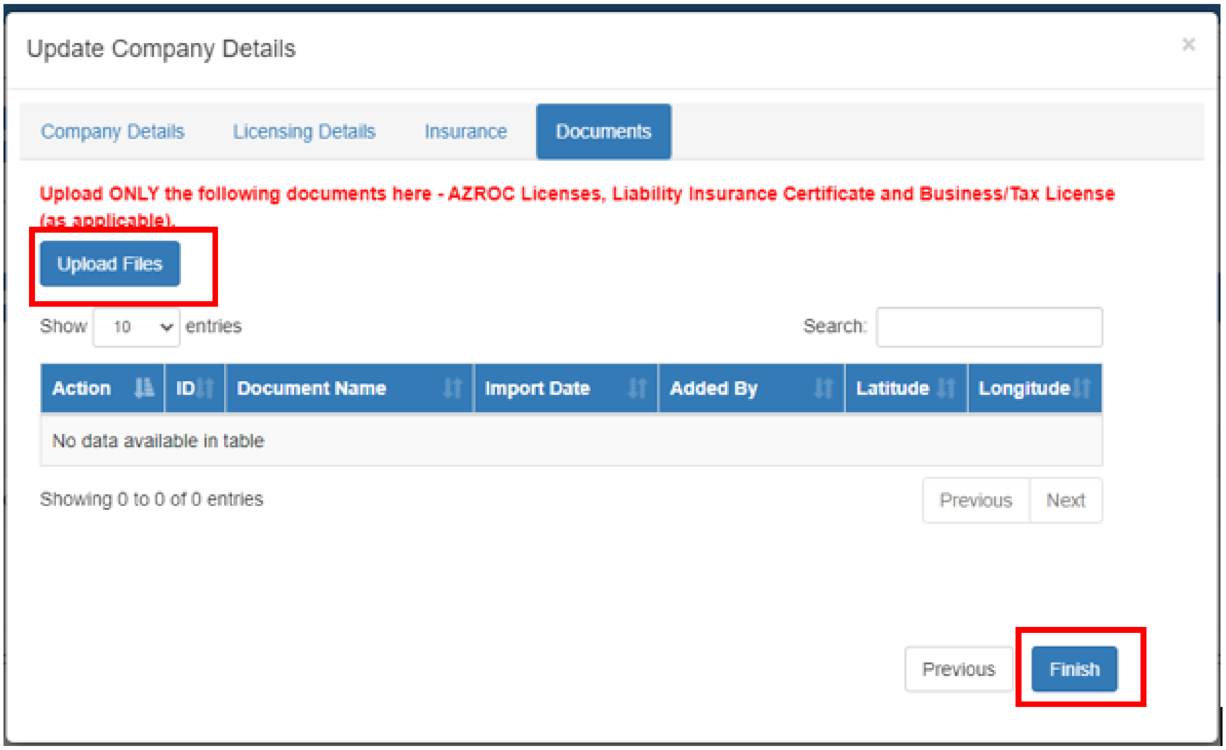
The information has been successfully entered, click “Next”.



Follow the same procedure to enter insurance information. When done, click ‘Next”.

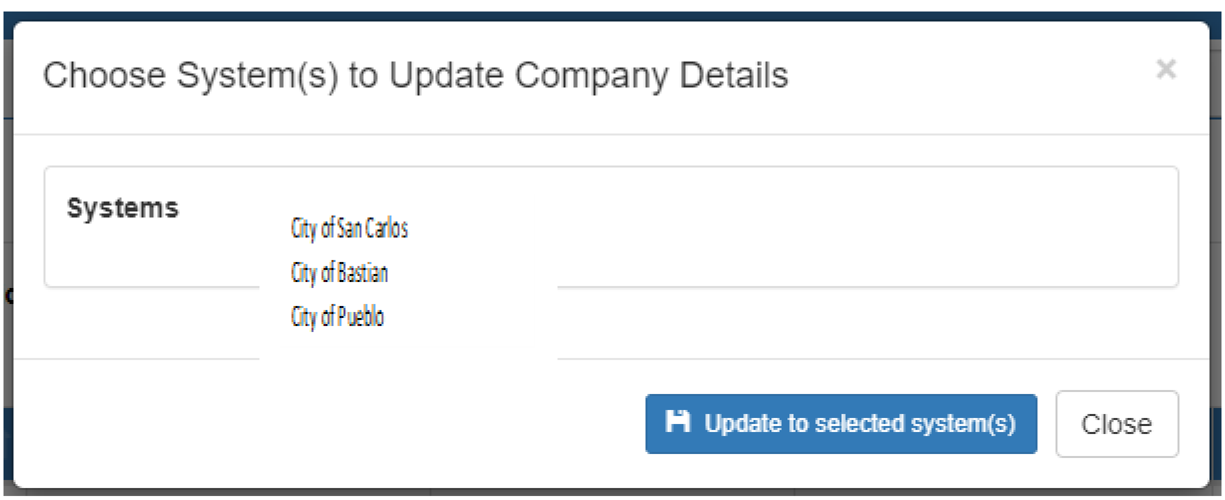


When done entering insurance, a warning will appear, warning the user to only enter the company documents. Upload the appropriate files and click “Finish”.



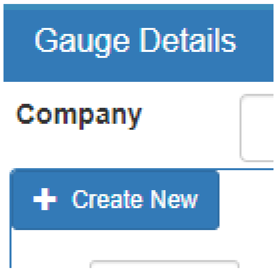
“Choose System (s) to Update Company Details” will pop up. When the drop down under “Systems” is clicked the user will be given a menu of other jurisdictions to choose from. When chosen, the company details will automatically be sent to the other jurisdictions for approval, eliminating the need to enter it numerous times.

When done close the window.

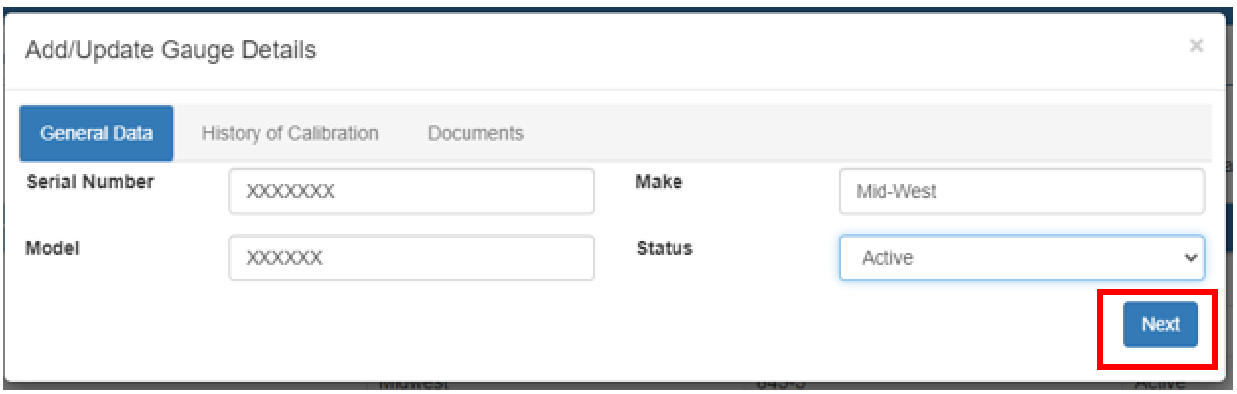


Adding a New Gauge

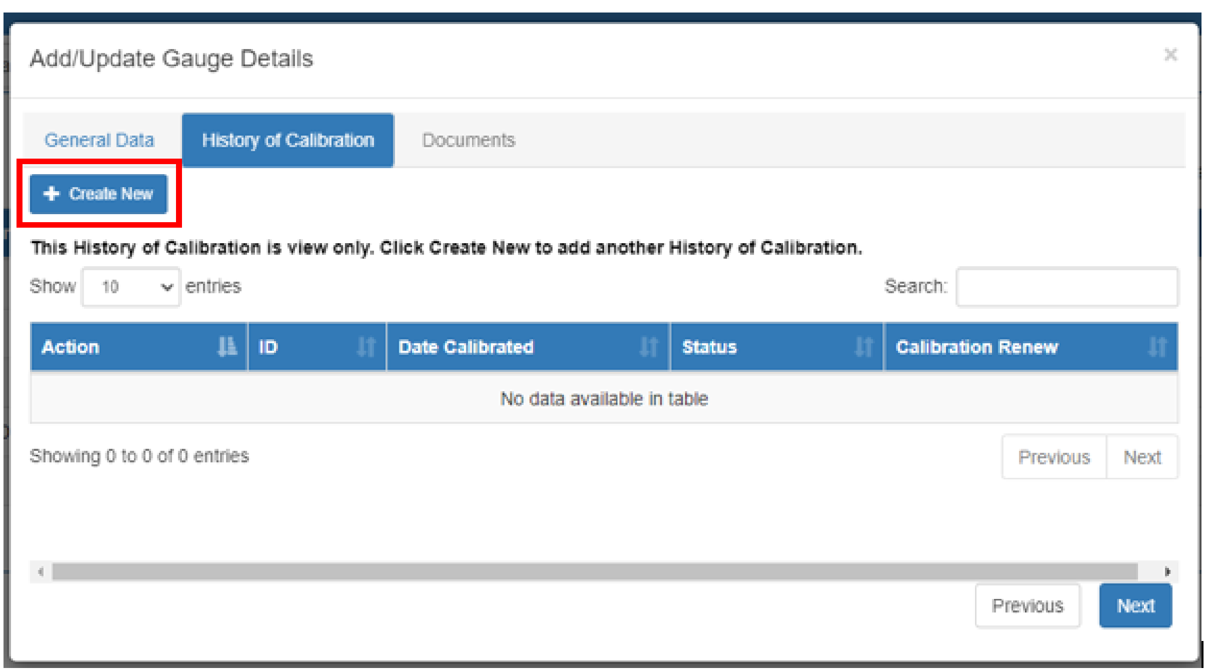
To add a new gauge, click on the “Gauge Details” tab, click “Create New”.



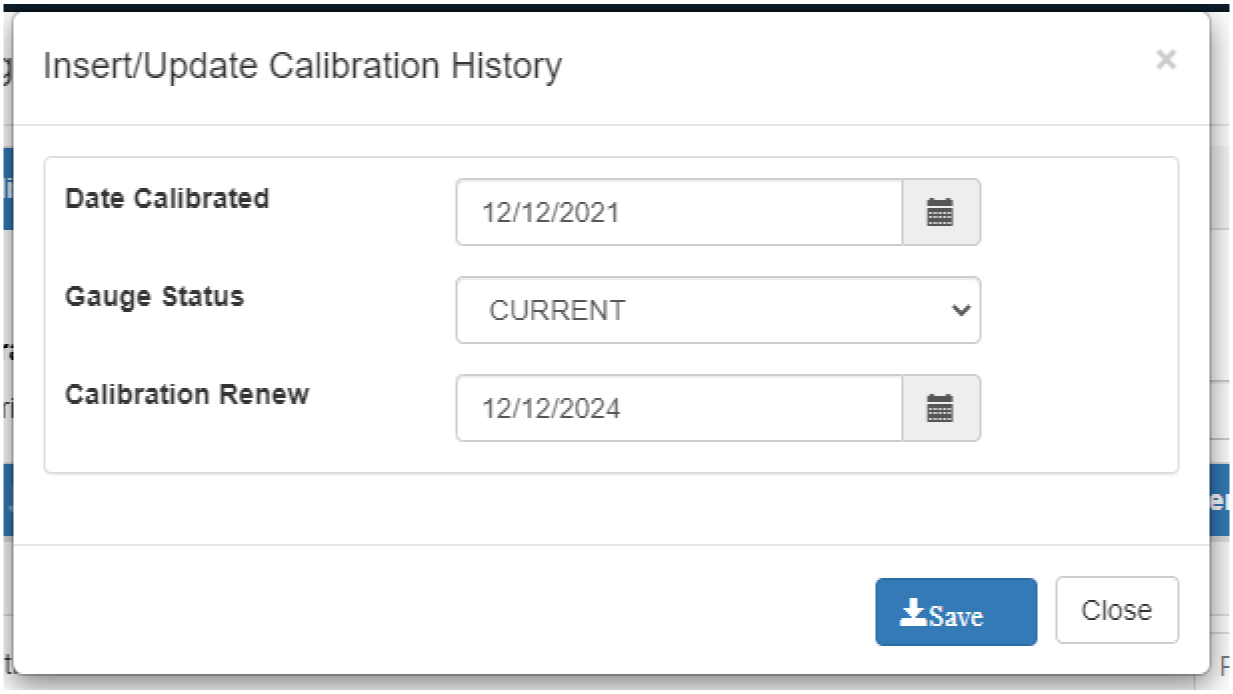
“Add/Update Gauge Details” will pop-up. Enter the information of the new gauge, click “Next”.



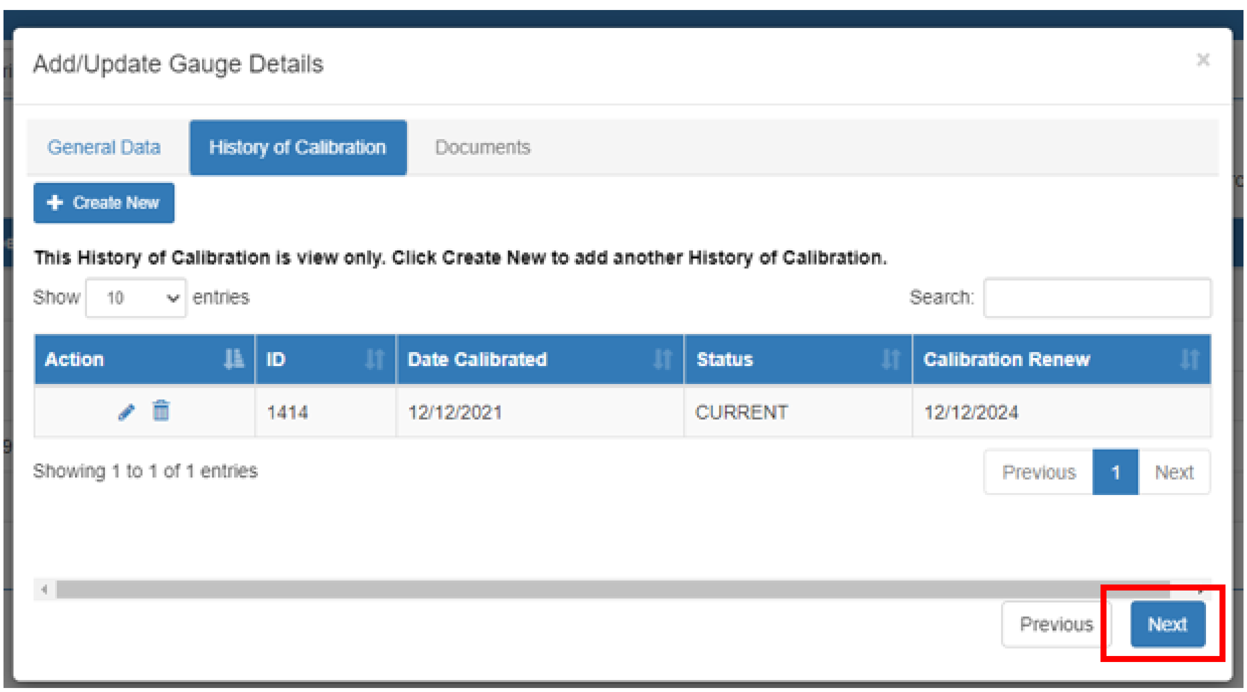
“Add/Update Gauge Details will pop-up, click “History of Calibration’, and “Create New”.



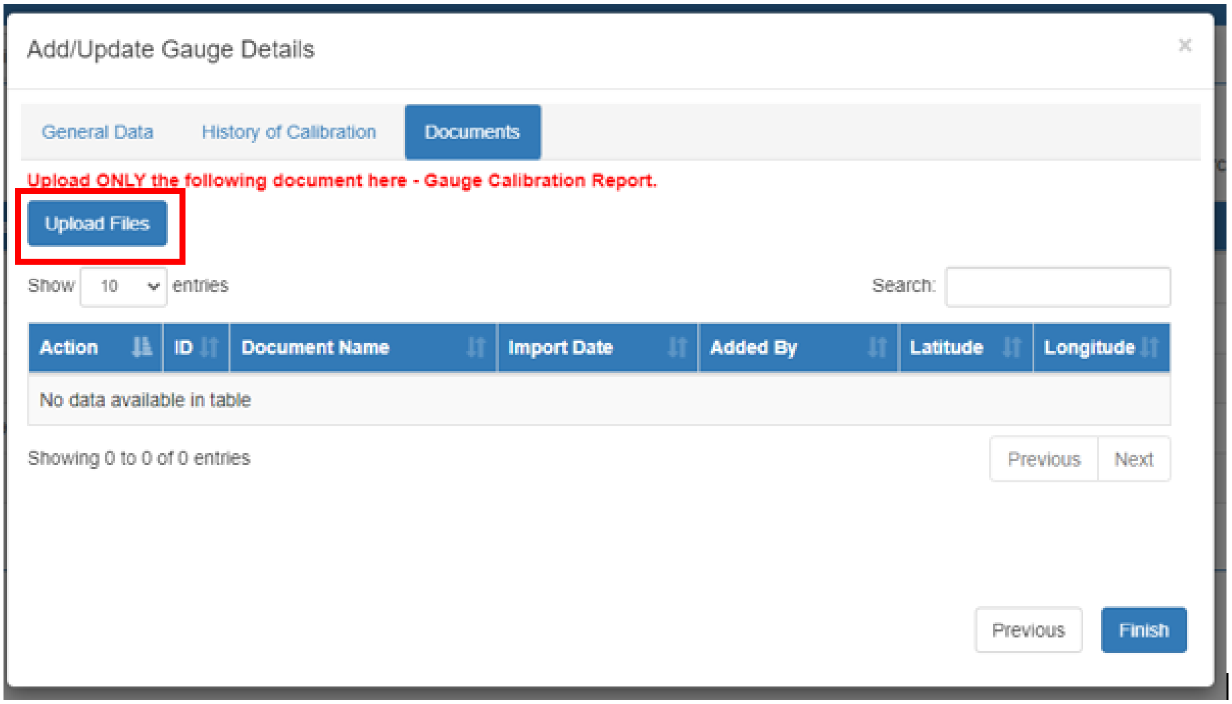
Once the information is entered, “Save” and close.



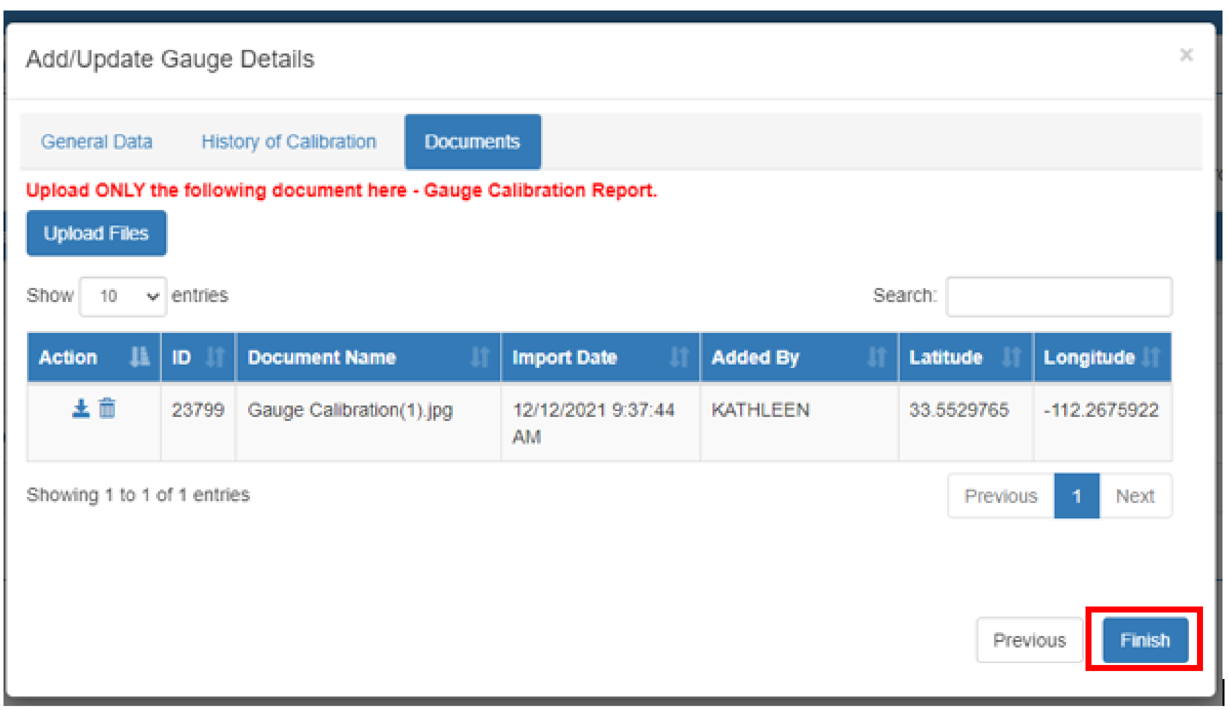
The gauge has been successfully entered, click “Next”.



Add/Update Gauge Details will pop-up with a warning to the user to only upload gauge calibration documents. Click “Upload Files”.

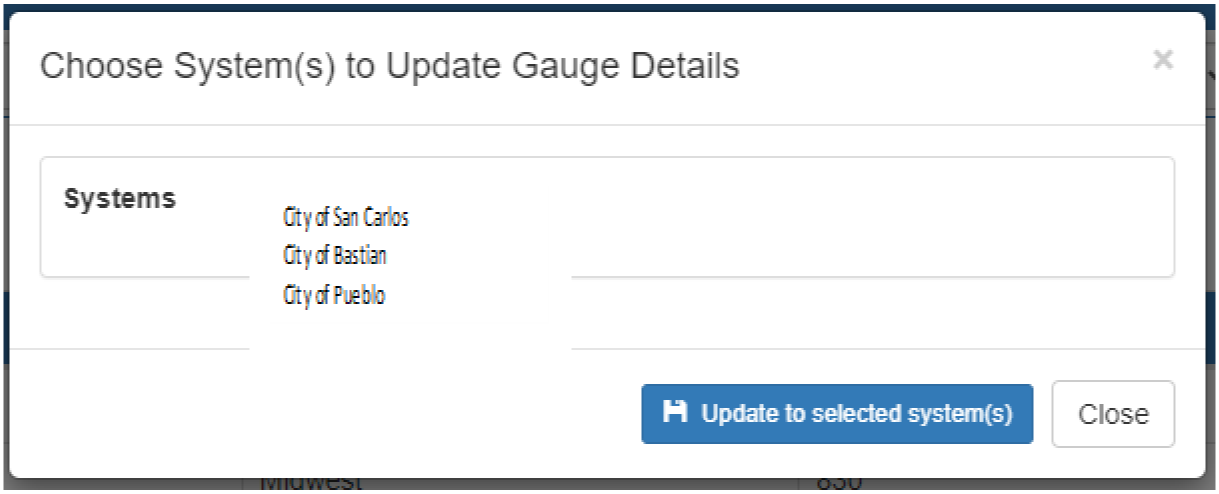


The file has been successfully uploaded. Click “Finish”.



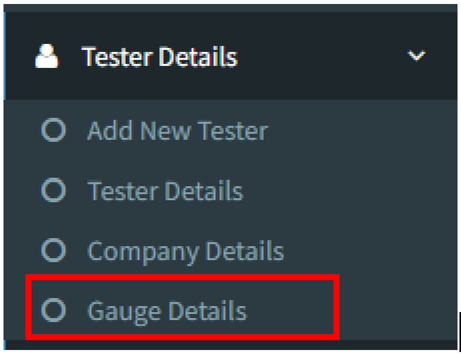
“Choose System (s) to Update Gauge Details” will pop up. When the drop down under “Systems” is clicked the user will be given a menu of other jurisdictions to choose from. When chosen, the gauge details will automatically be sent to the other jurisdictions for approval, eliminating the need to enter it numerous times.

When done close window.

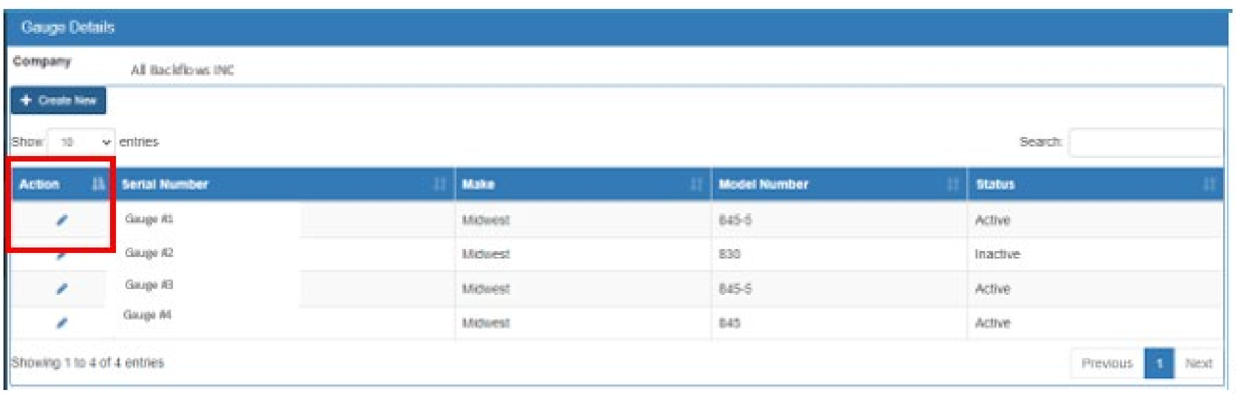


Updating Gauge Details

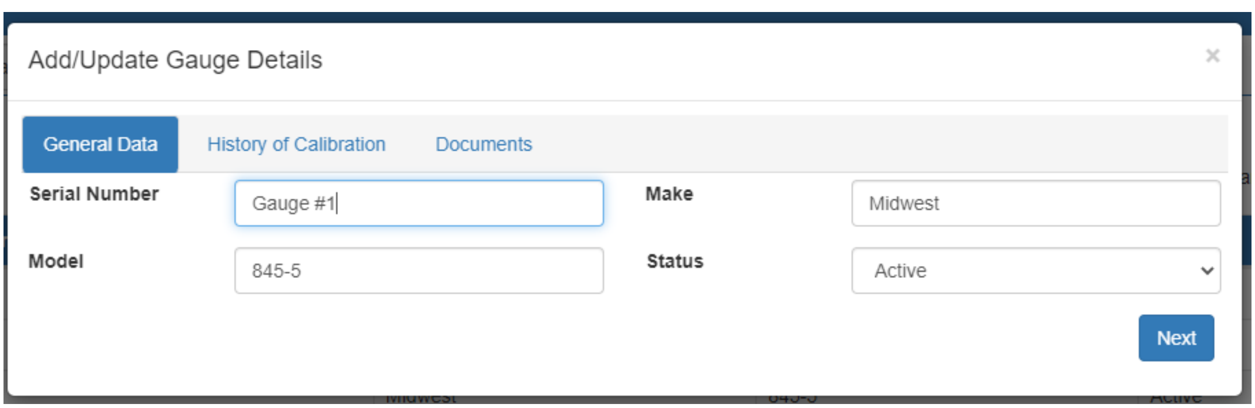
To Update a company's test gauge, click on "Gauge Details".



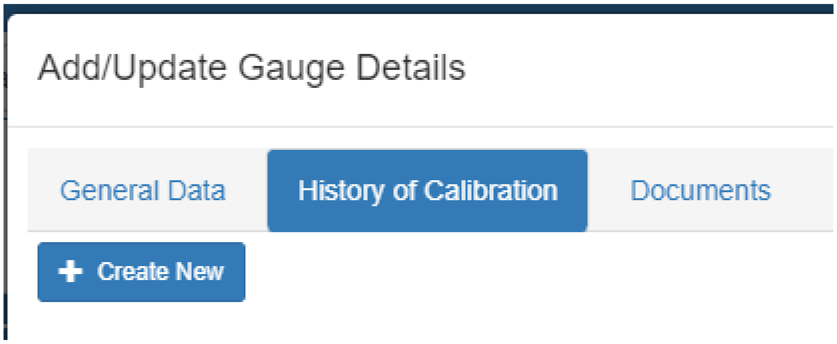
A list of all the gauges assigned to the company is listed. To update a new calibration for a gauge, click the "Pencil" under the "Action" column.



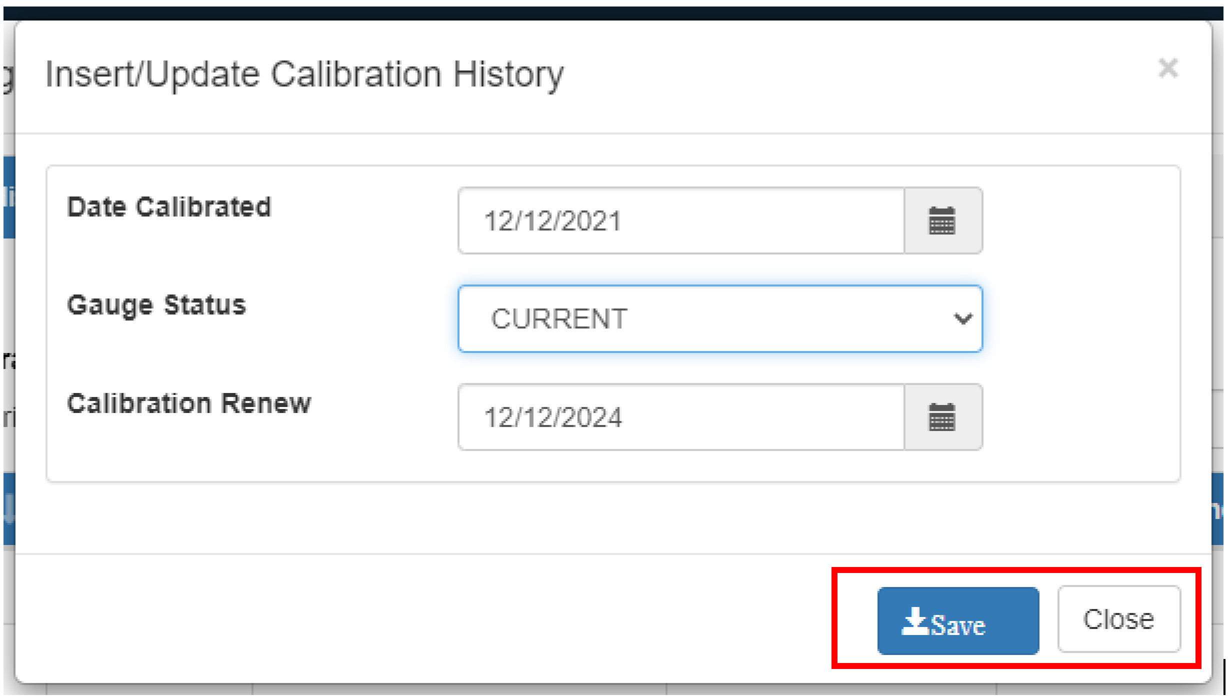
The "Add/Update Gauge Details" will pop-up.



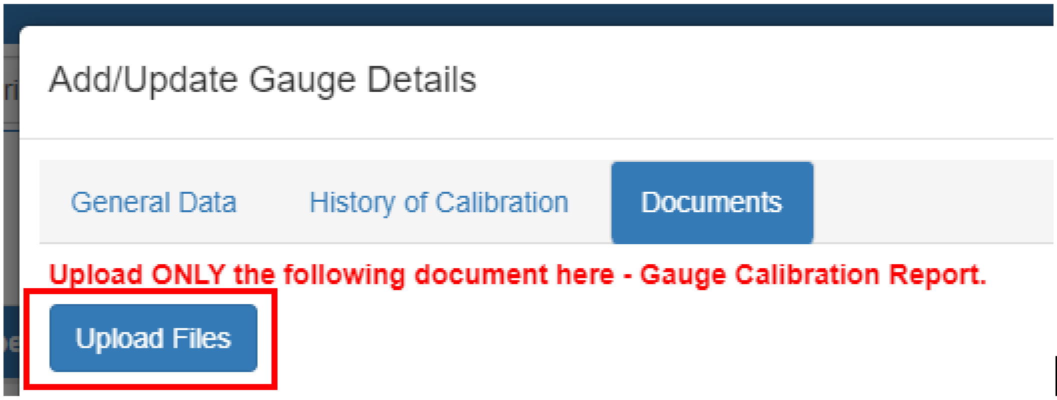
Click “History of Calibration” and “Create New”.



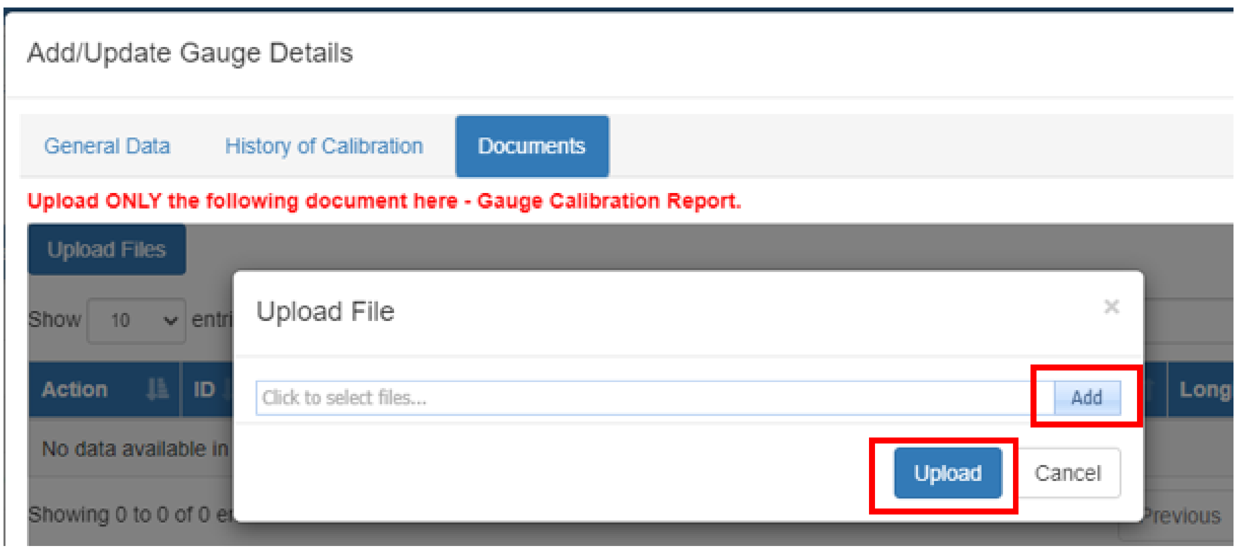
Enter the information, click “Save” and close.



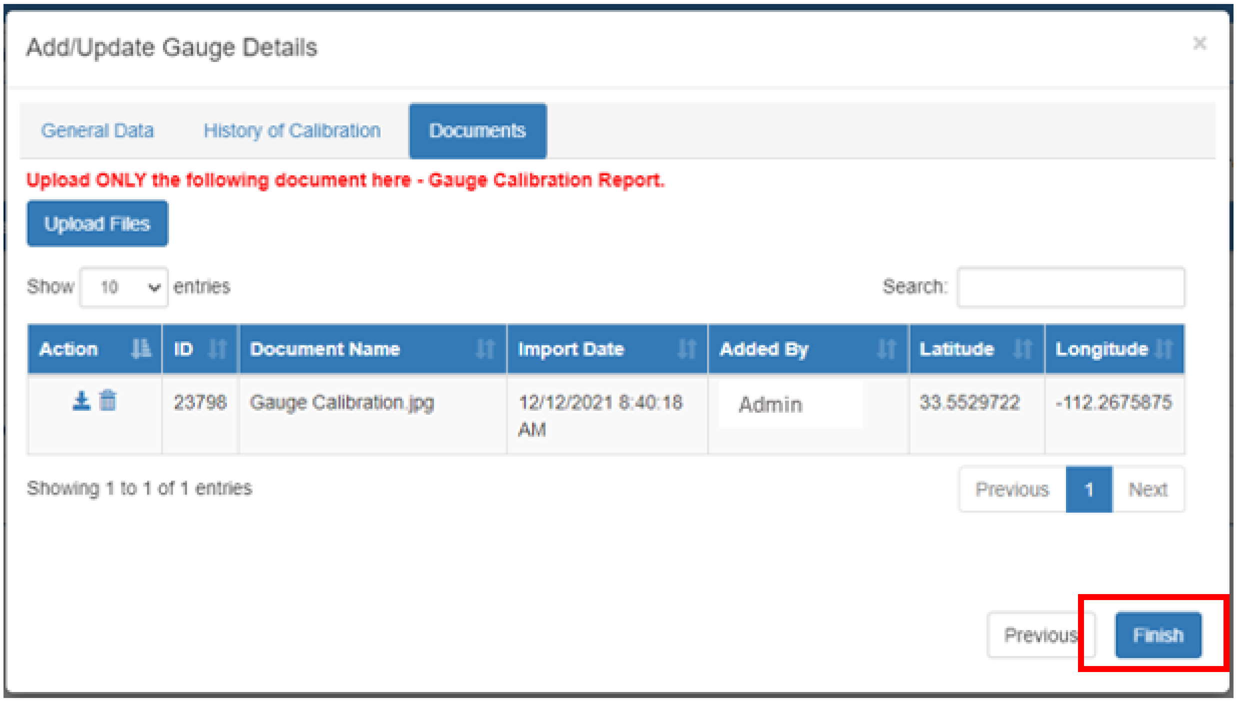
Click on the “Documents’ tab. The “Add/Update Gauge Details” pop-up will remind the user to only upload gauge documents. Click on ‘Upload Files”.



The “Upload File” will pop-up. Click “Add”, choose file, and “Upload”.

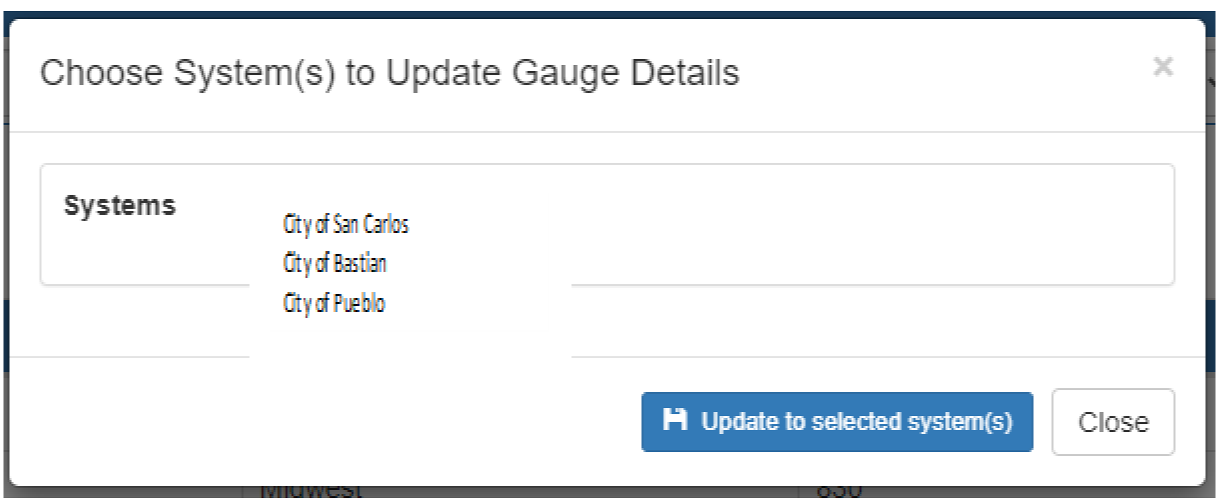


The file has been successfully uploaded, click “Finish”.



“Choose System (s) to Update Gauge Details” will pop up. When the drop down under “Systems” is clicked the user will be given a menu of other jurisdictions to choose from. When chosen, the gauge details will automatically be sent to the other jurisdictions for approval, eliminating the need to enter it numerous times.

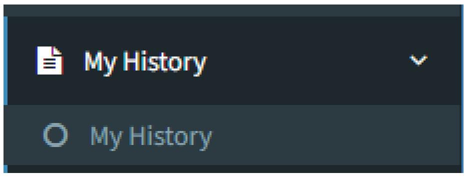
When done close the window.



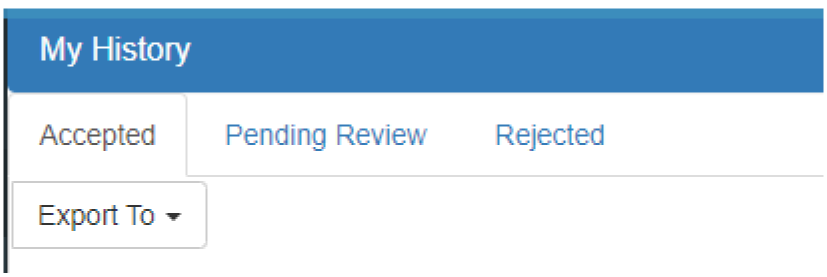
My History

My History contains the test reports that the user has input into SAMS Universal Portal. The information contained in My History are the Accepted, Pending Review, and Rejected.

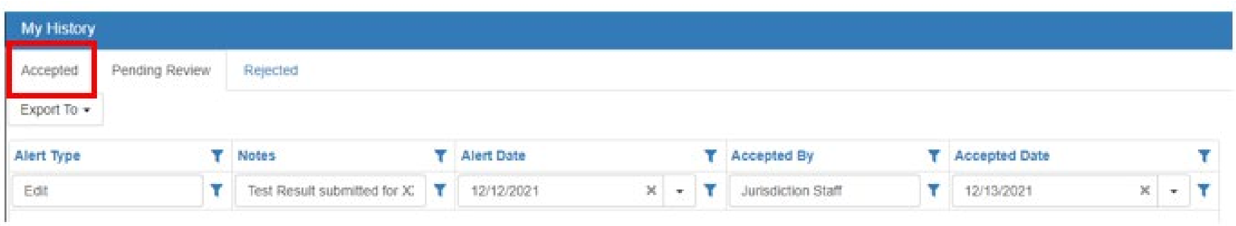
"Accepted" are the reports that have been accepted by a jurisiction. "Pending Review" are the reports that have not been accepted, are waiting for approval from the jurisdiction. "Rejected" are reports that the jurisdiction did not accept. In the case of a rejection, the user will get an email from the jurisdiction indicating why the reports were rejected. The user will correct the issue and re-submit the reports back to the jurisdiction.



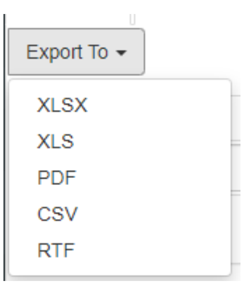
Click on My History



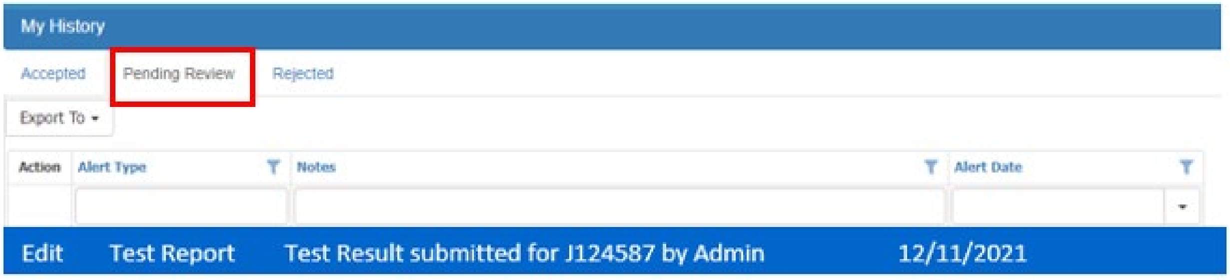
All the test reports, company, and tester information the user has entered will be under "Accepted".



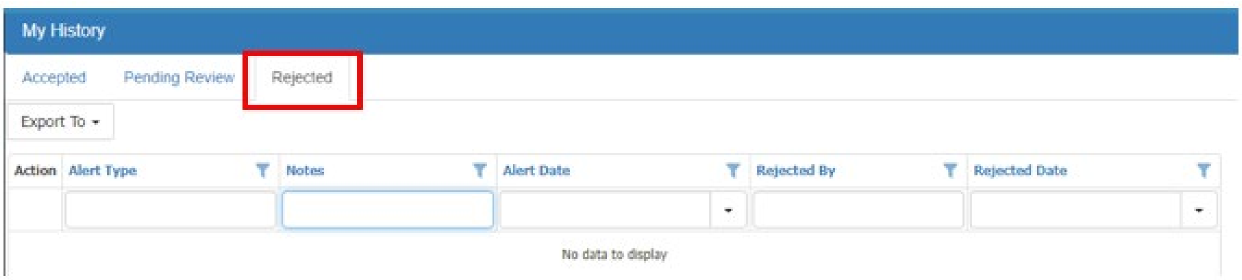
This history can be exported to Excel by clicking "Export" and choosing XLSX.



Click “Pending Review” to view reports that have been submitted to the jurisdiction, but are not accepted.

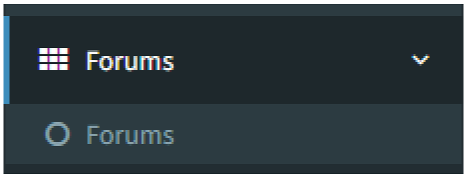


Click on the “Rejected” tab. If the user has any rejected reports, they will be populated here. Please see Page 53 for more on “Rejected” test reports, tester, and company information and how to enter the information and re-submit to the jurisdiction.

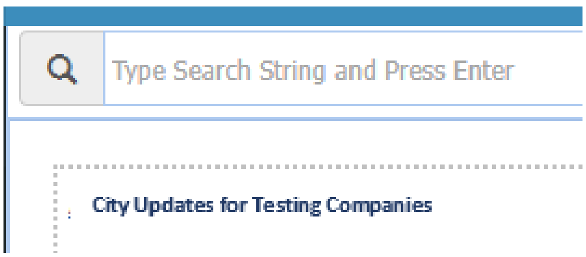


Forums

Forums is a place that Jurisdictions can send messages to multiple users or a single user. Click on "Forums".



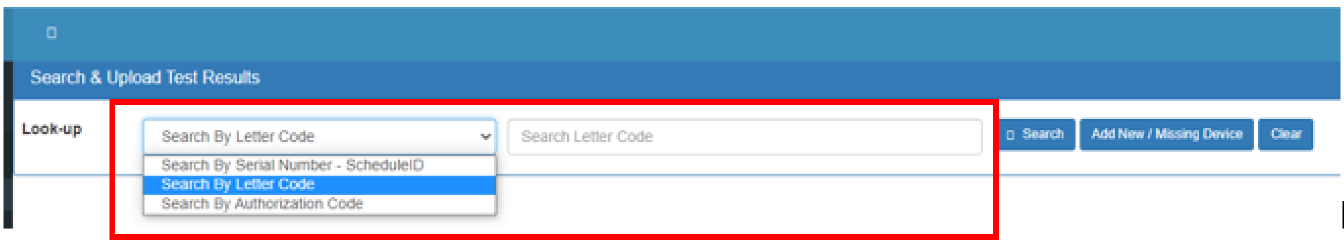
Click on the message to review.



Entering Test Reports into SAMS Universal Portal

To enter test reports, a “Letter Code”, “Schedule ID”, or an “Authorization Code” is needed. The jurisdiction generate these codes and they are on the letters sent to the customer.

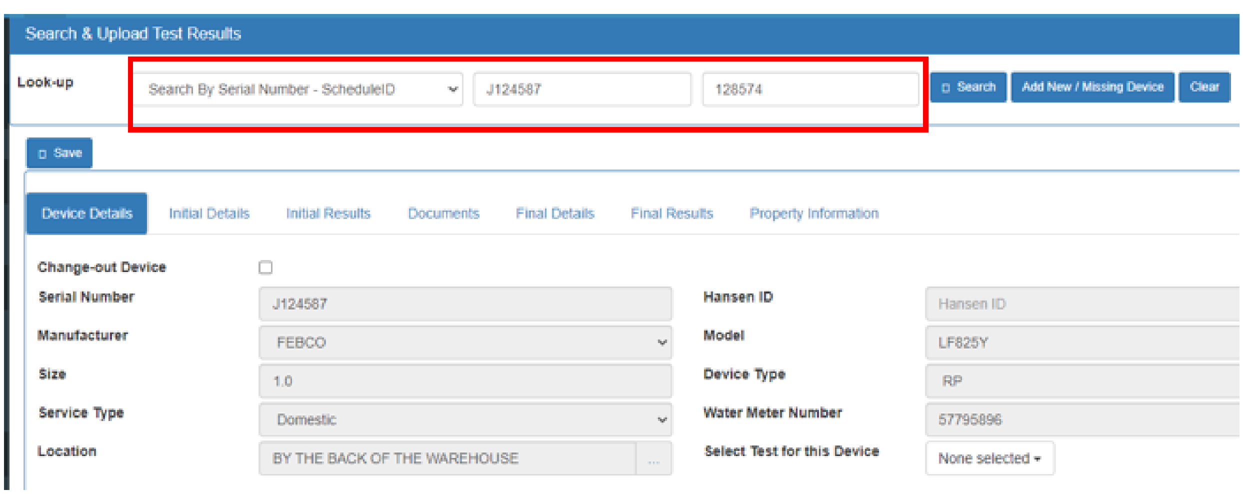
- The “Letter Code” can be used for a passing test report and repairs, if devices fail. The “Letter Code” is good for one year.
- The “Schedule ID” is only used for one device, one report.
- The “Authorization Code” is a code that the jurisdiction assigns to a commercial business that will not change year after year. The jurisdiction can only assign and change an “Authorization Code”.



Device	FEBCO LF825Y 1''			Test Due Date	01/31/2022
Address	7110 W Parsons Dr			Serial Number	J124587
Schedule ID	128574	Letter Code	20220131AB	Meter Number	57795896
Location: BY THE BACK OF THE WAREHOUSE					

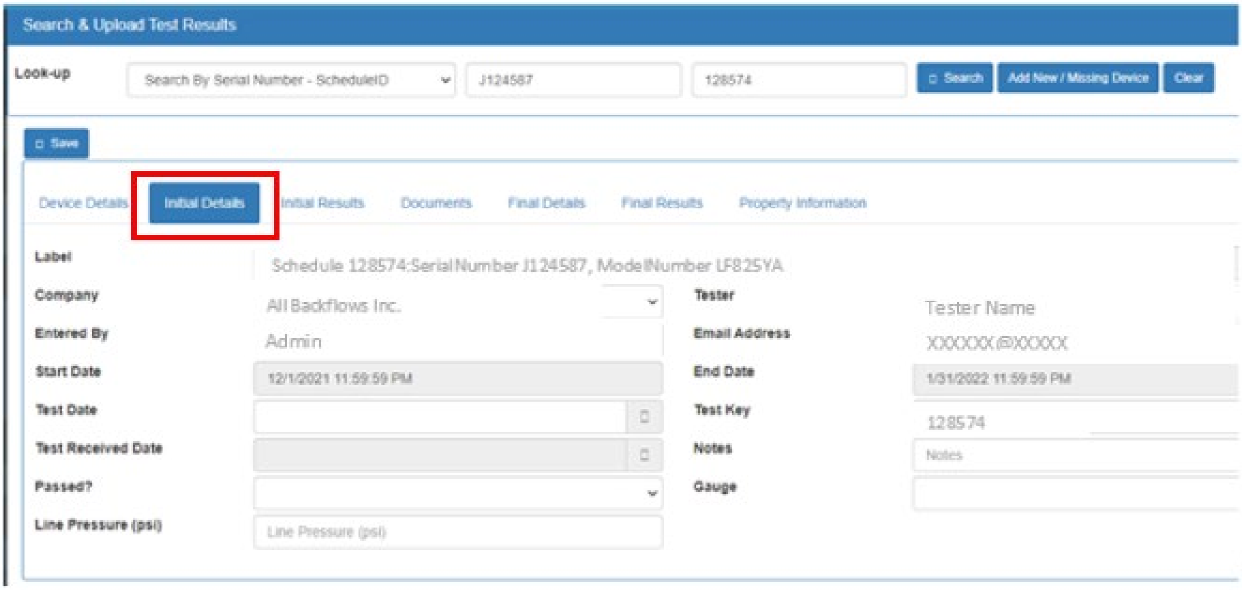
Once the ‘Letter Code”, “Schedule ID”, or “Authorization Code” is entered, Click search. Here, we are using the “Schedule ID”.

The “Device Details” tab contains all the information on the device, verify to ensure the information is correct. When verified, click on the “Initial Details” tab.

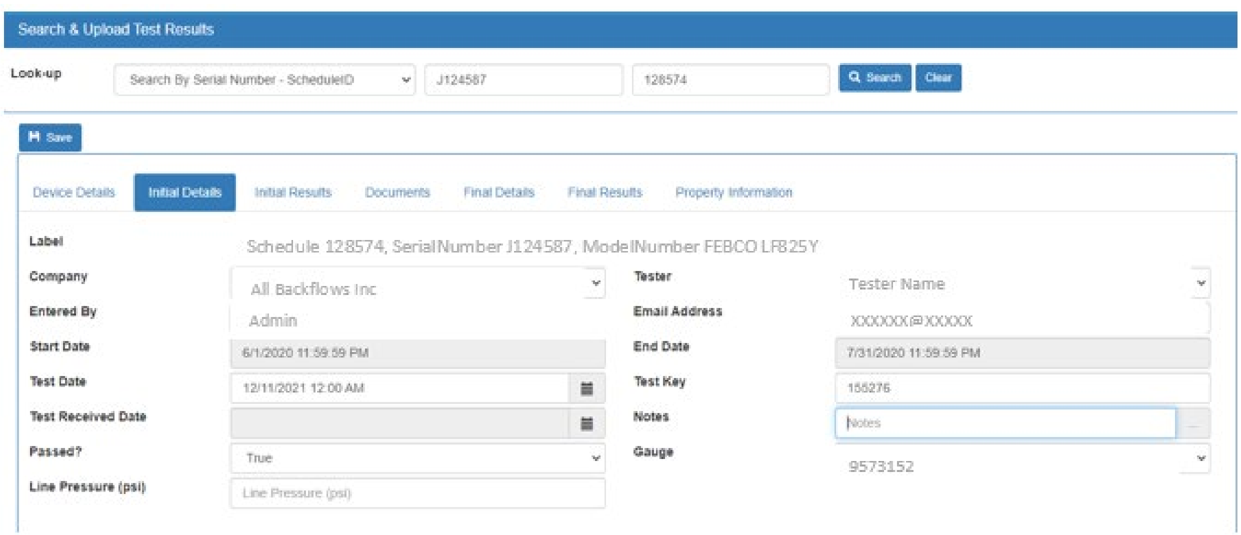


Entering a Passing Test Report into SAMS Universal Portal

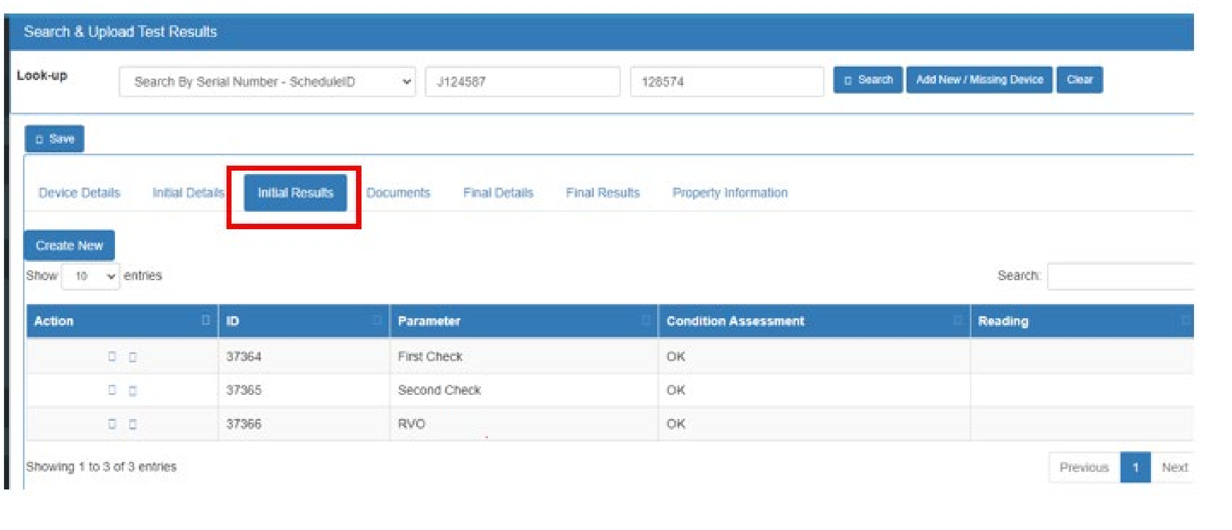
The “Initials Details” tab contains the details of the individual entering the test results, the tester that tested the device, the date the device was tested, test gauge used, and the result of the device inspection, **true** is passing, **false** is fail.



Once the Test Date, Passed?, Tester Name and Gauge Number is entered, click on the “Initial Results” tab.

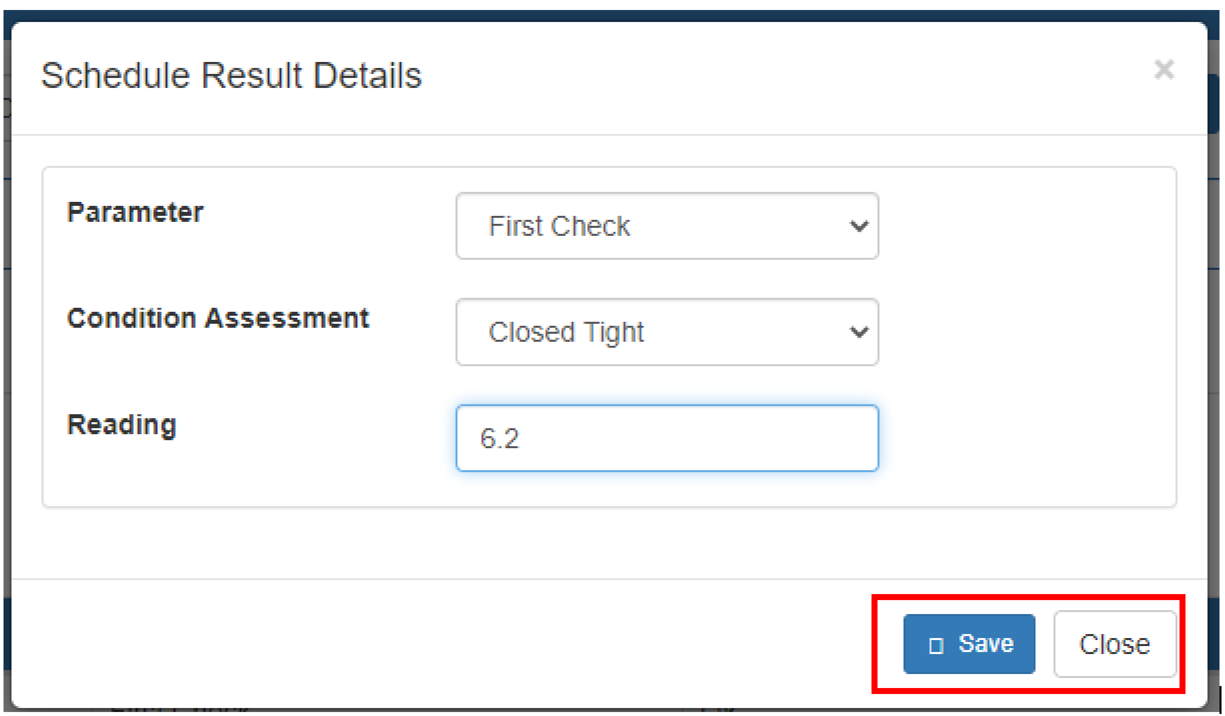


Initial test will be entered under the “Initial Results” tab. Click the first box under the “Action” column to enter the results for the first check valve.



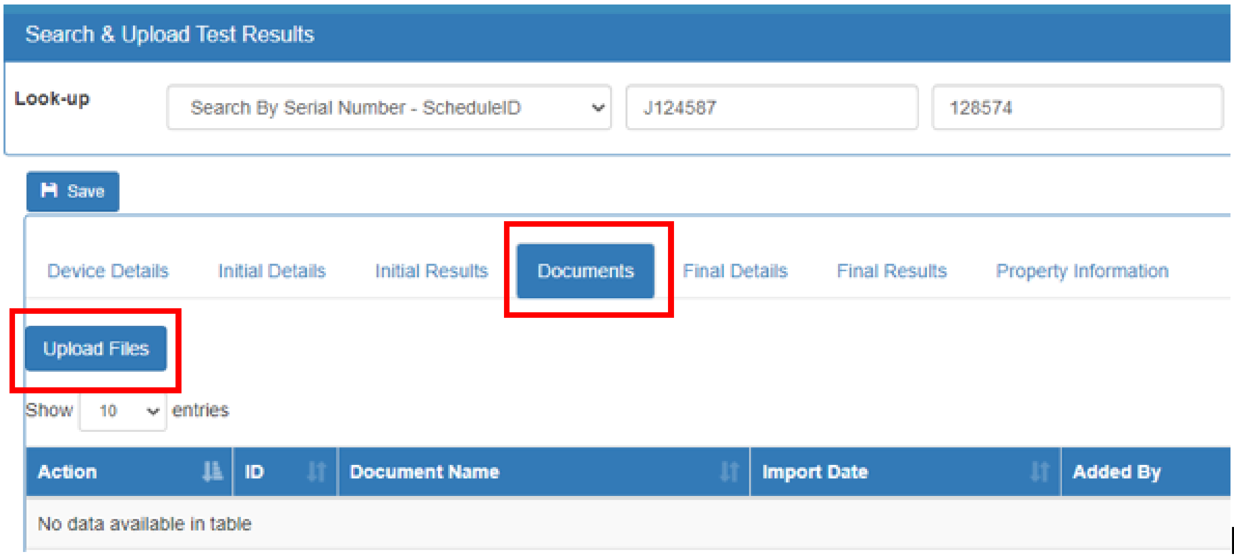
In Schedule Results Details, click on the “Condition Assessment” and enter the condition of the first check valve.

After entering the Condition Assessment of the first check valve, enter the Reading for the first check valve and select “Save” and close the pop up.

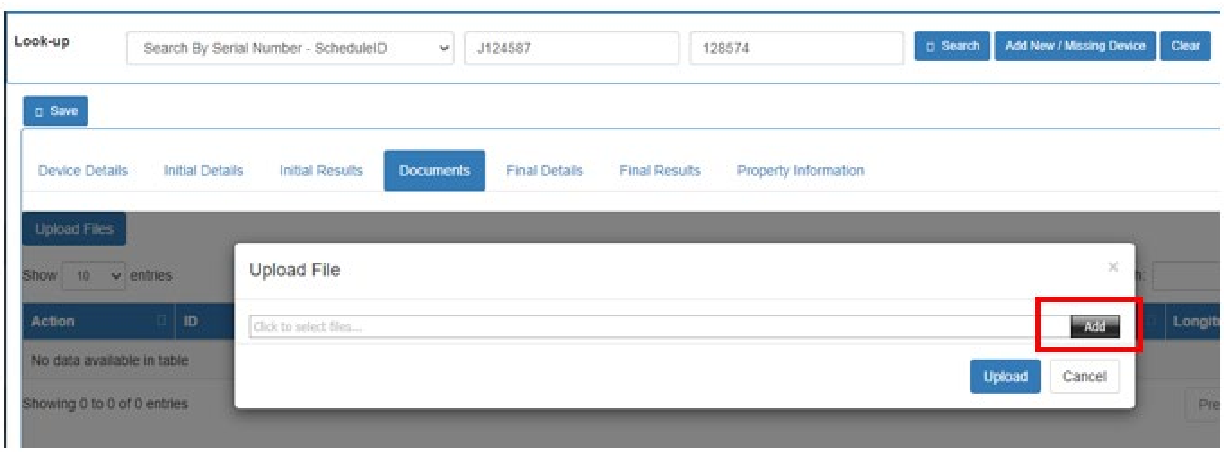


Follow the procedure for the second check and the relief valve. When done, click on “Save” and “Close”. Next, click on the “Documents” tab.

The “Documents” tab allows the admin to upload any documents or photos from the inspection. Click “Upload Files”.

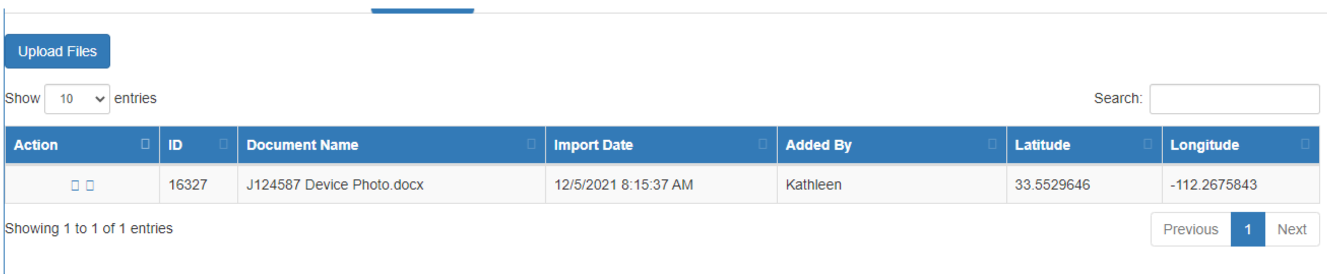


From the pop up, click “Add”.

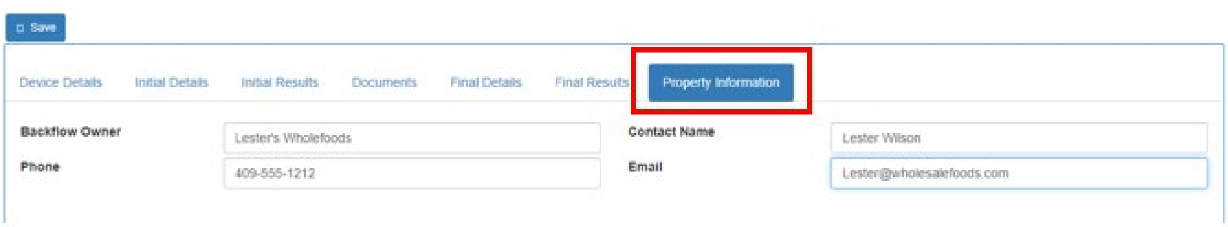


Once the file is added, click “Upload”.

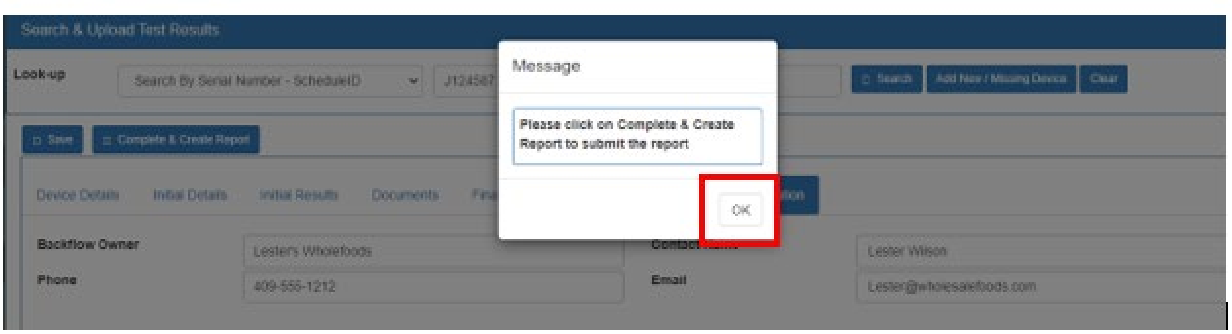
Your file has been uploaded.



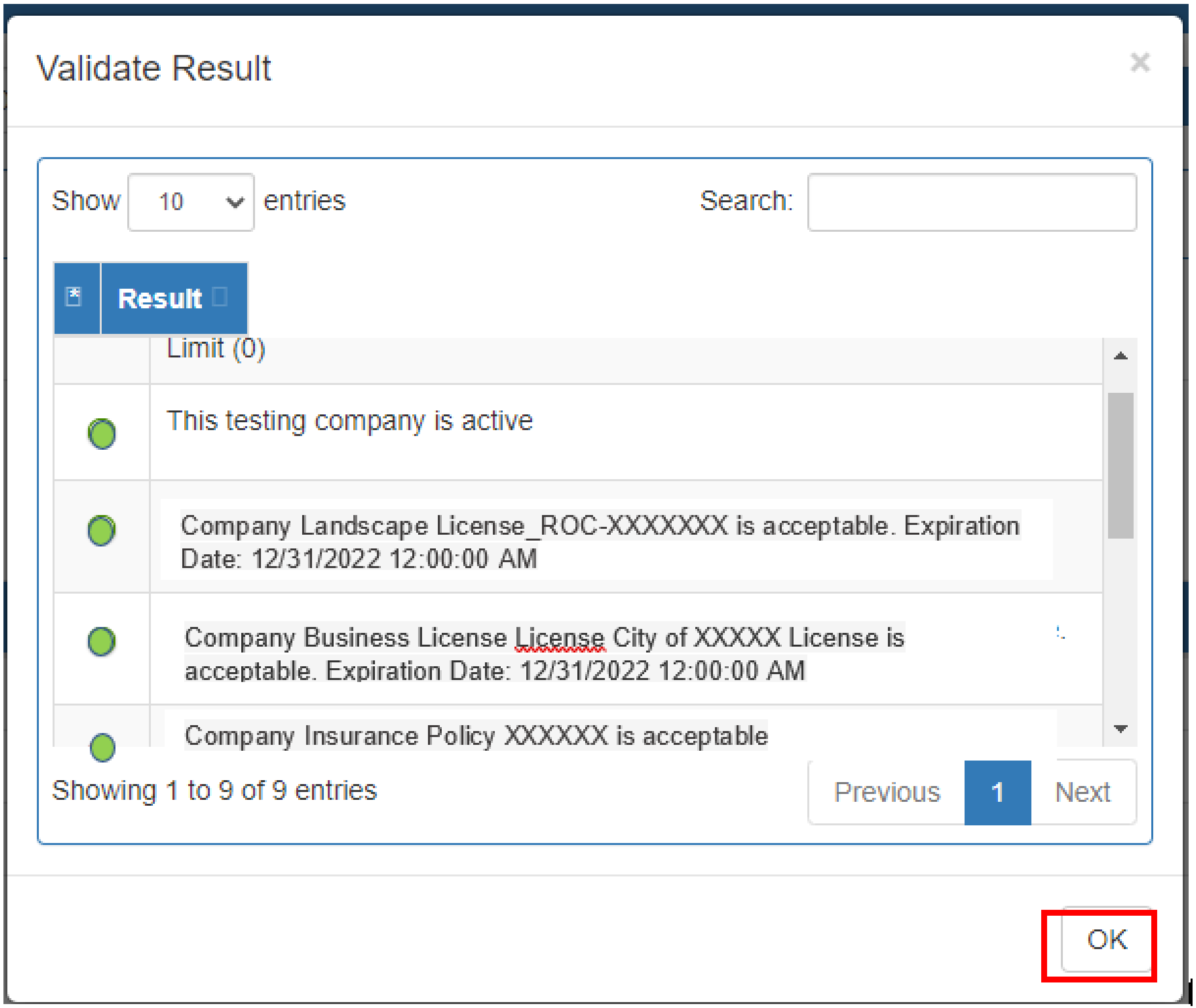
Once all the information for the passing results is entered, click “Property Information and verify that the information is correct. Once verified, Click the “Save” button.



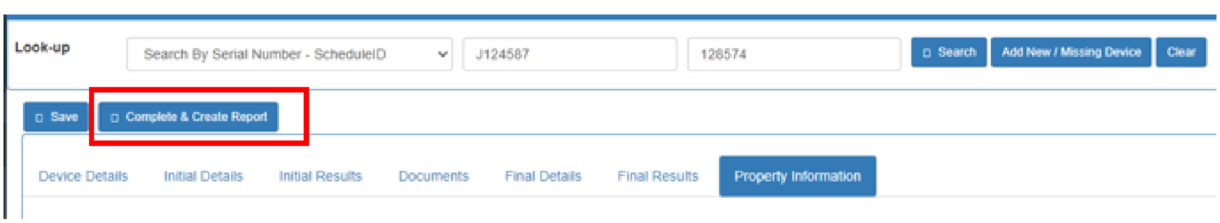
The following pop up will appear, click “OK”.



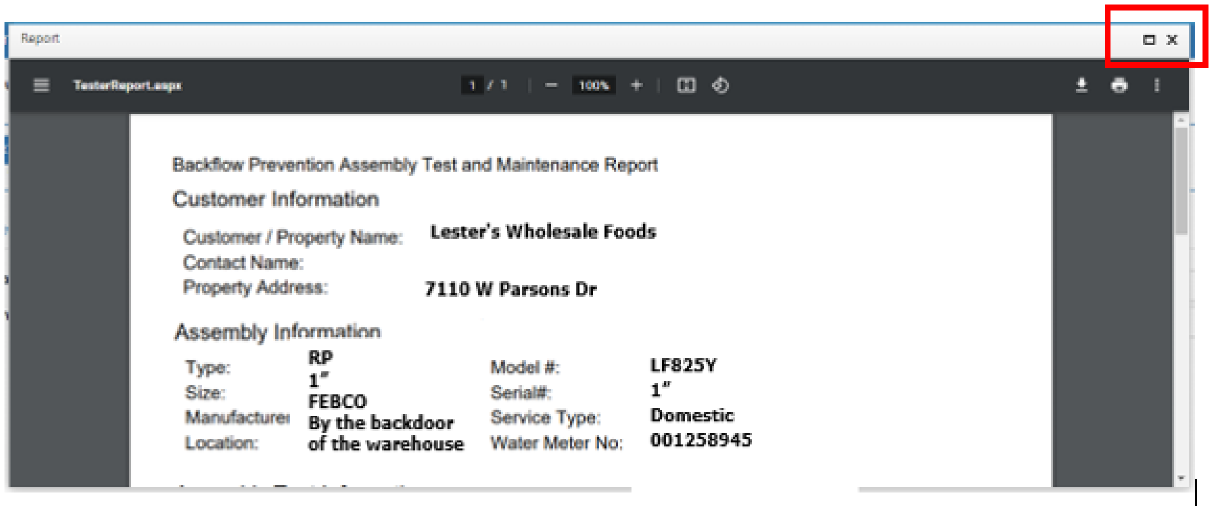
The Validation screen will appear for your review. If any dots on the validation screen are red, new company/tester information will need to be entered or the test results may be rejected by the jurisdiction. Click “OK” to close the screen.



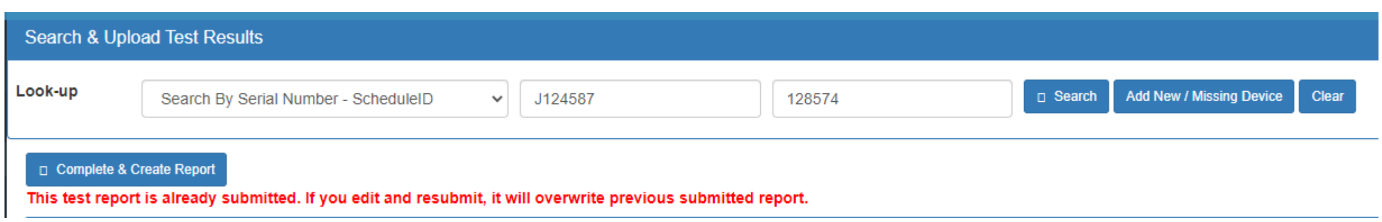
Click “Complete & Create Report”.



The report may be printed out or downloaded. Click “X” box in top right corner to exit.

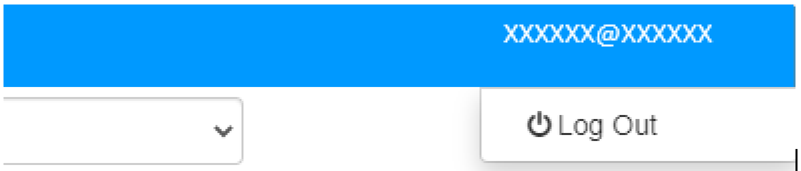


The following highlighted warning will appear. This indicates the report was submitted to the jurisdiction and is pending approval.



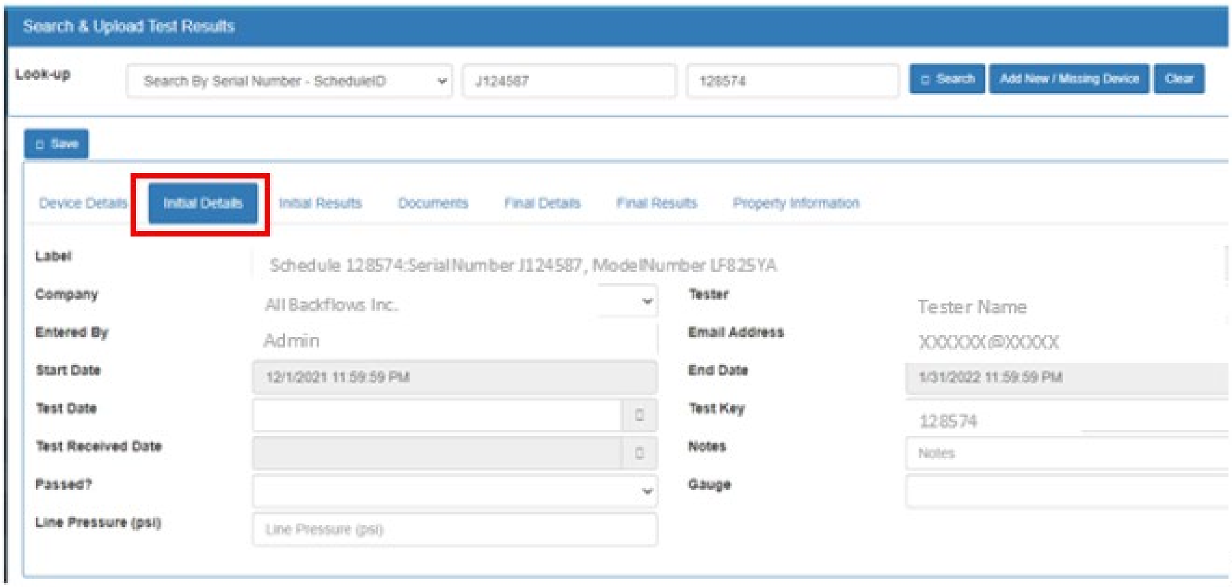
You may also confirm pending approval from the jurisdiction by looking in “MY History” under “Pending Approval” tab.

Once completed, log out of SAMS Universal Portal by clicking on login name, at the top right of the portal, click on “Log Out”.

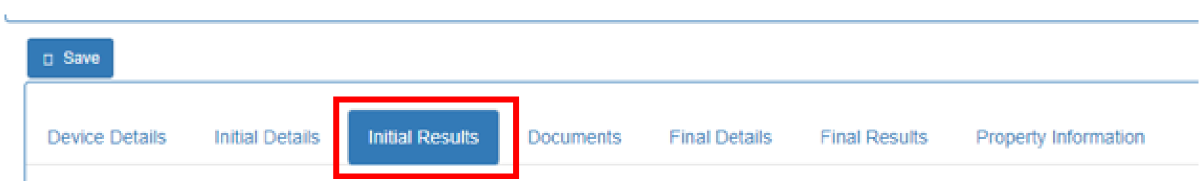


Entering a Failed Test Report into SAMS Universal Portal

The "Initials Details" tab contains the details of the individual entering the test results, the tester that tested the device, the date the device was tested, test gauge used, and the result of the device inspection.

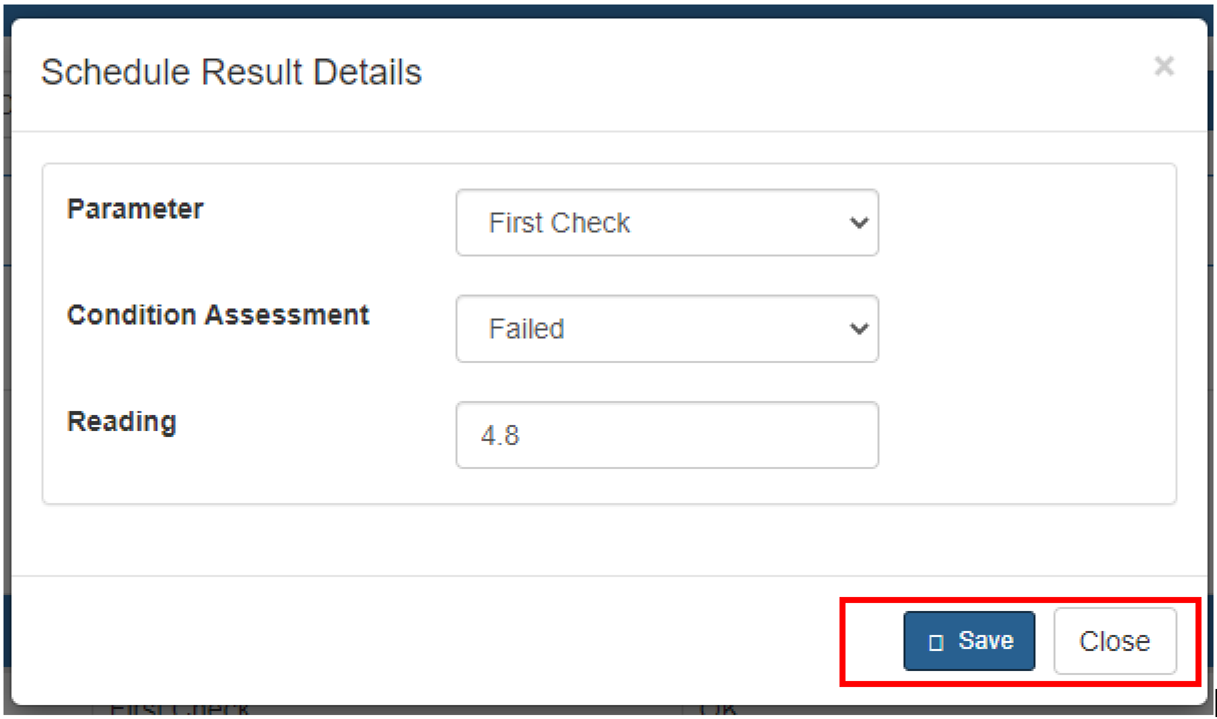


Once the Test Date, Passed?, Tester Name and Gauge Number is entered, click on the "Initial Results" tab.

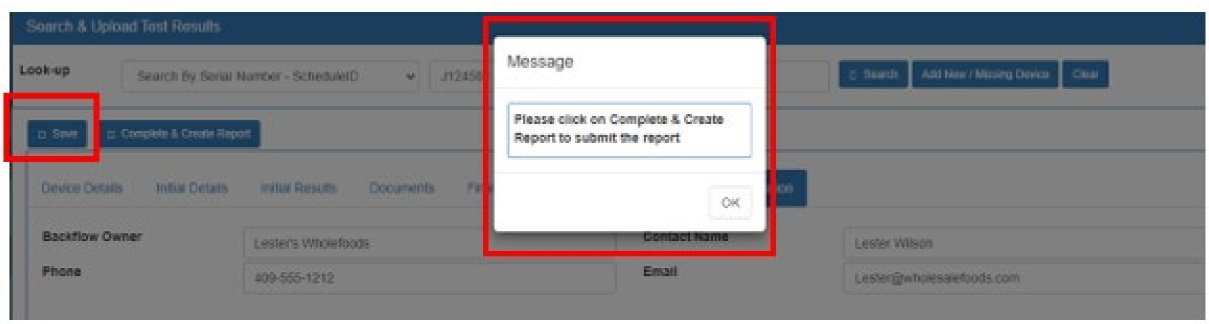


“Schedule Result Details” will pop up, click on “Condition Assessment” and choose condition of the first check valve. In Condition Assessment drop down Choose “Failed” and enter the reading.

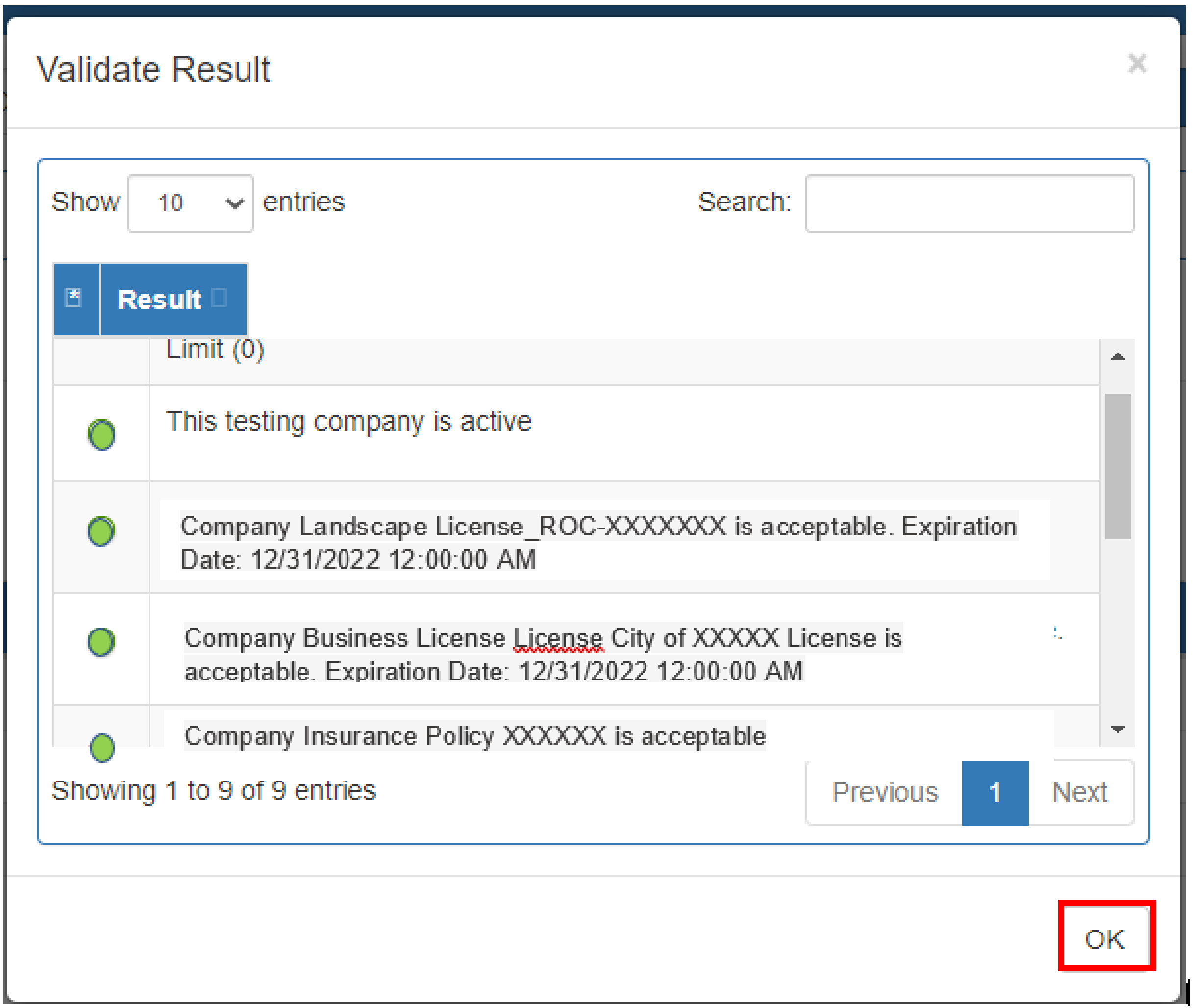
Follow the procedure for the second check and the relief valve. When done, click on “Save” and “Close”.



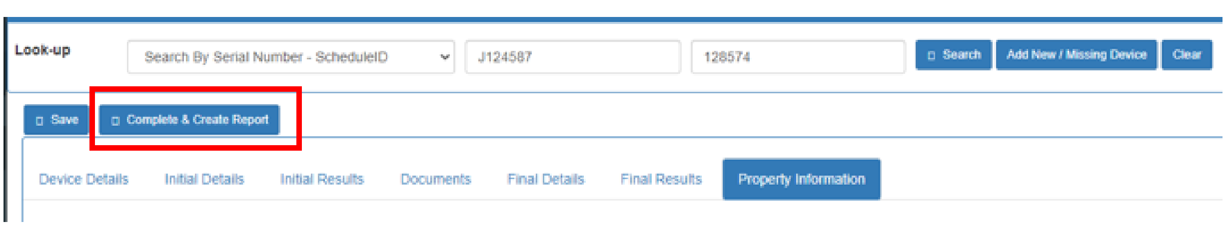
Once all the information is entered, click on “Save”. The following pop up will appear, click “OK”.



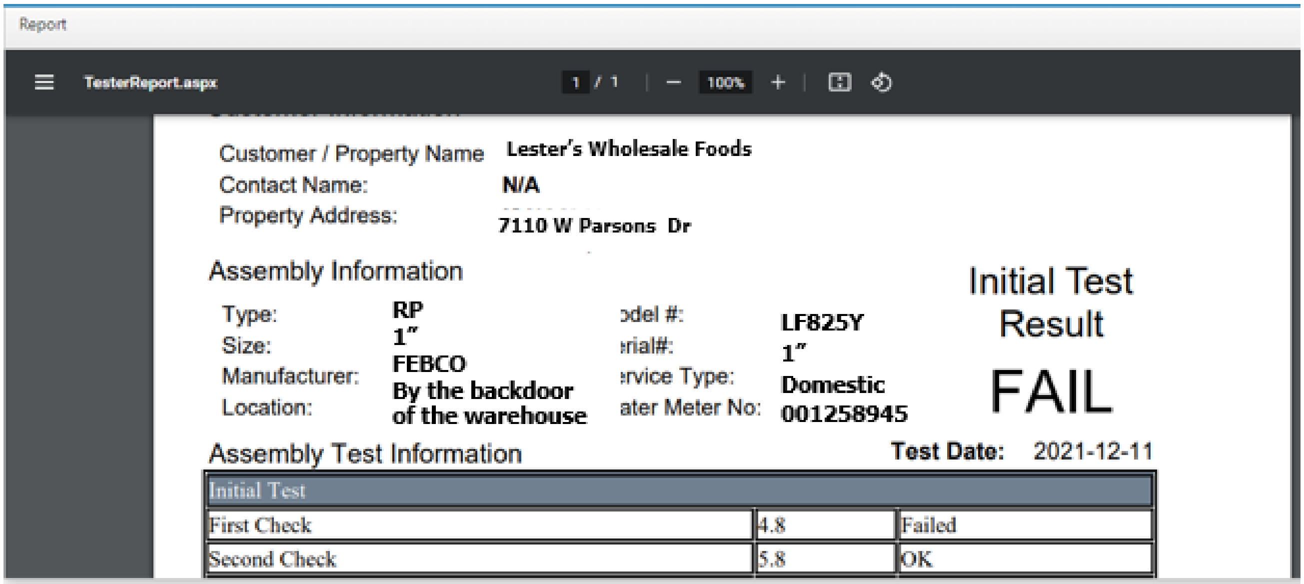
The Validation screen will appear for your review. If any dots on the validation screen are red, new company/tester information will need to be entered or the test results may be rejected by the jurisdiction. Click “OK” to close the screen.



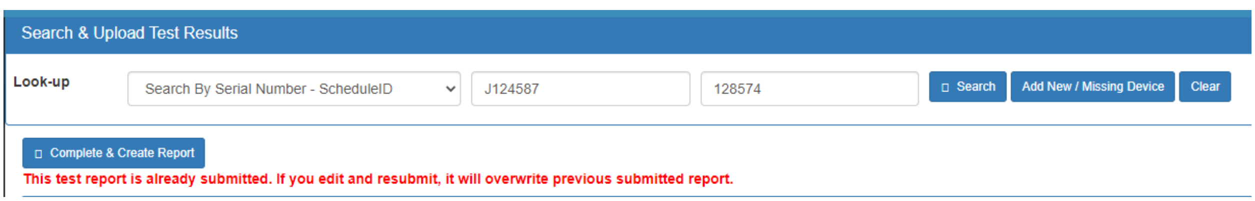
Click “Complete & Create Report”.



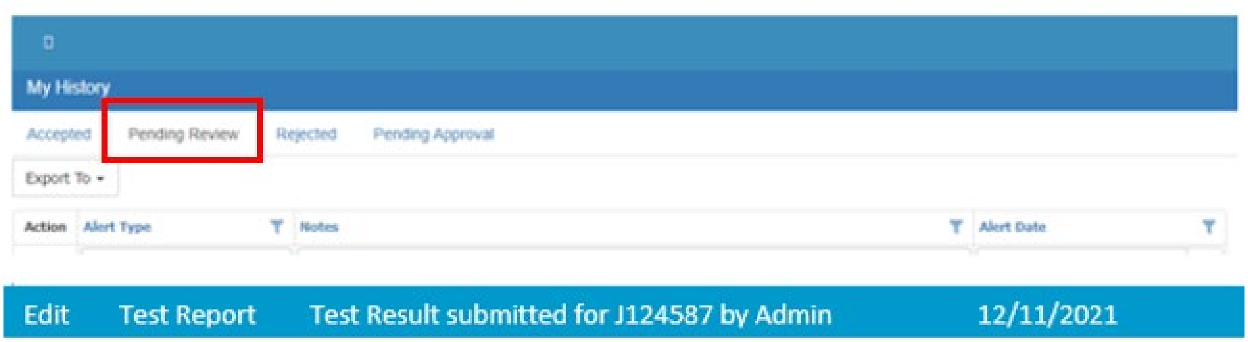
The report indicates that the initial test failed. The report may be printed out or downloaded. Click "X" top right corner to exit.



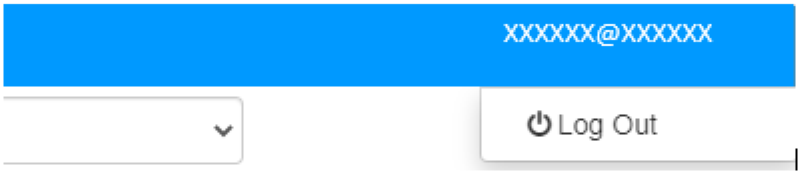
The following highlighted warning will appear. This indicates the report was submitted to the jurisdiction and is pending approval.



You may also confirm pending approval from the jurisdiction by looking in "MY History" under "Pending Approval" tab.



Once completed, log out of SAMS Universal Portal by clicking on login name, at the top right, click on "Log Out".

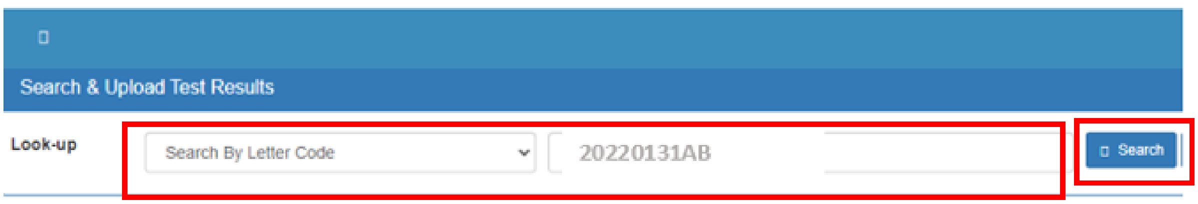


Entering a Repair Test Report into SAMS Universal Portal

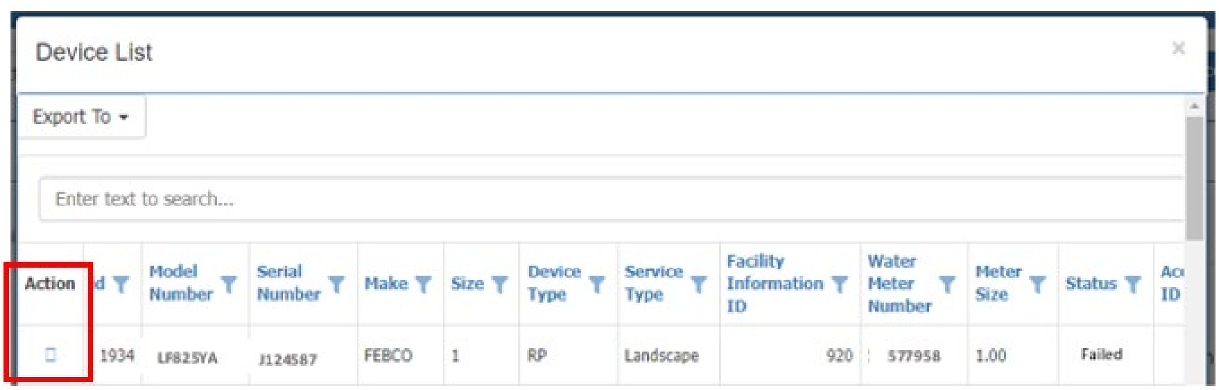
When a device fails and the report submitted to the jurisdiction, a new letter is sent to the customer for repairs. The new “Schedule ID” can be used or the “Letter Code” from the original letter can be used.

Here, the “Letter Code” is used.

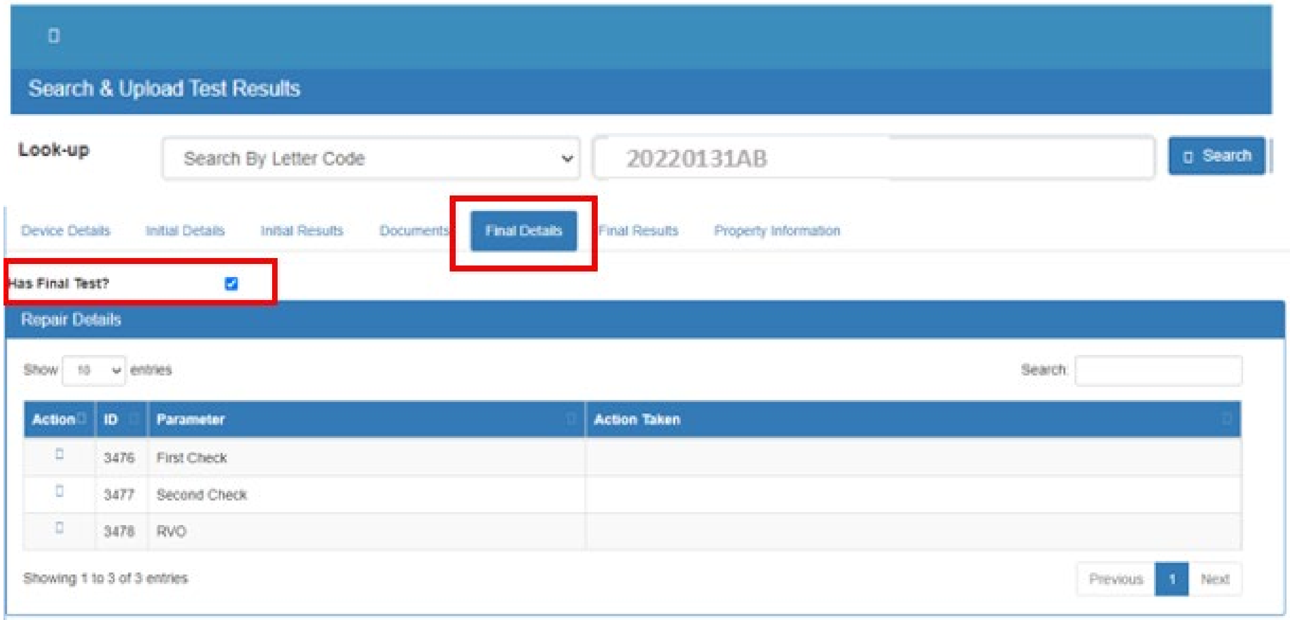
Device	FEBCO LF825Y 1''			Test Due Date	01/31/2022
Address	7110 W Parsons Dr			Serial Number	J124587
Schedule ID	156836	Letter Code	20220131AB	Meter Number	57795896
Location: BY THE BACK OF THE WAREHOUSE					



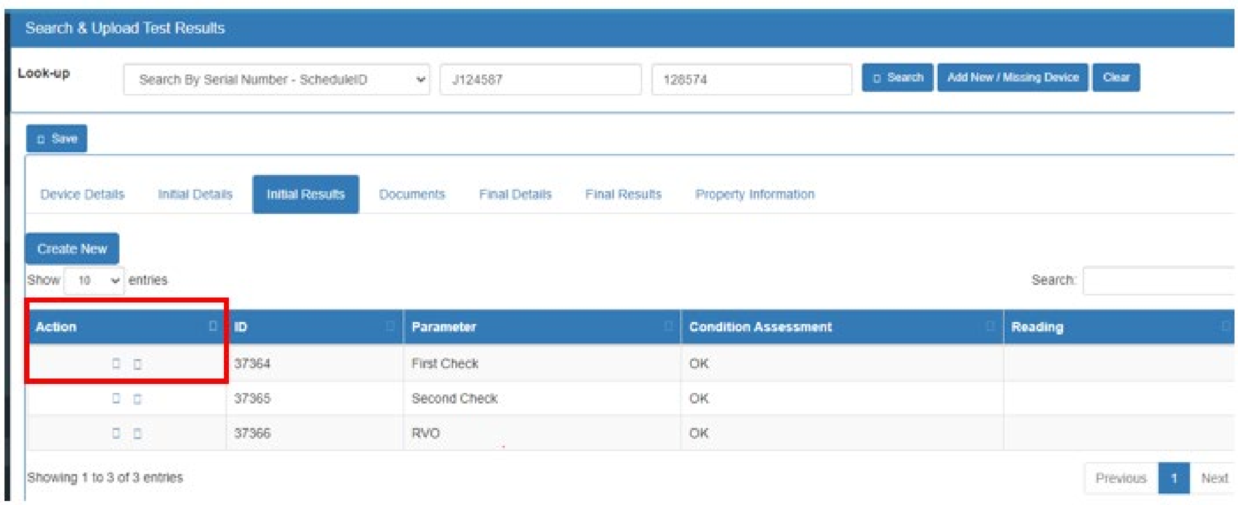
Once the “Letter Code” is entered, click on “Search” and the Device List will pop up. Click the box under the “Action” column for the device.



The “Final Details” tab is highlighted and the “Has Final Test?” is checked.

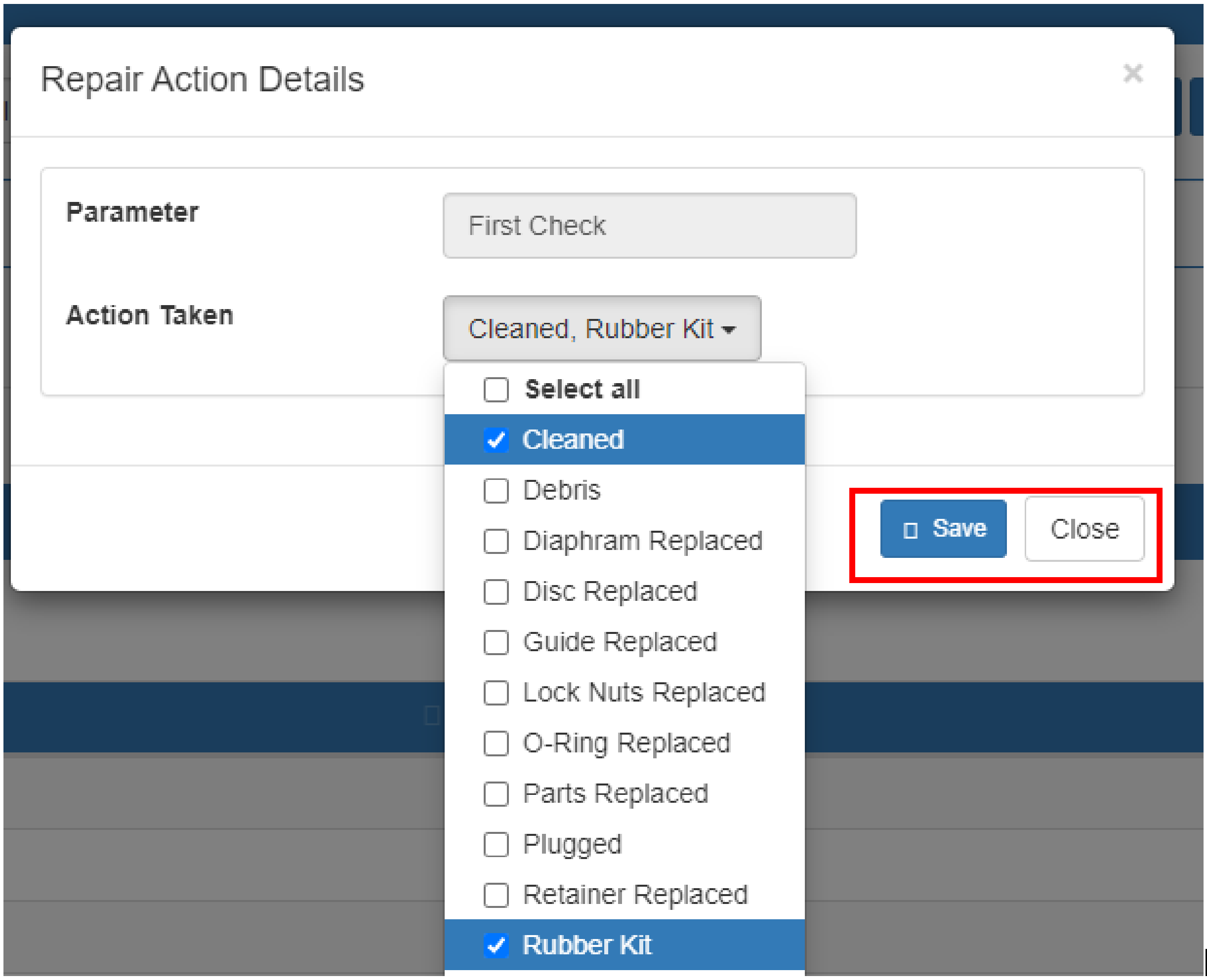


Click the first box under the “Action” column to enter the results for the first check valve.

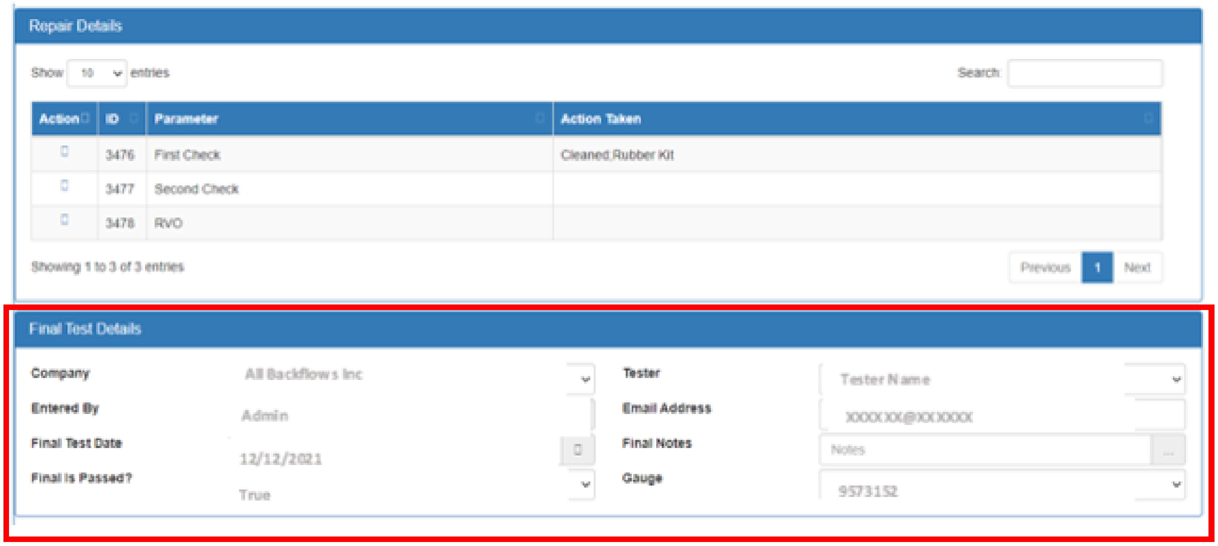


Click the drop down on “Repair Action Details”, and check what repairs were done on the first check. Once completed, click “Save” and close the window.

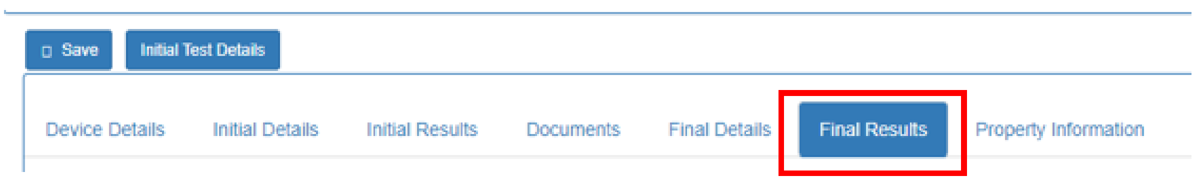
Follow the procedure for the second check and relief valve.



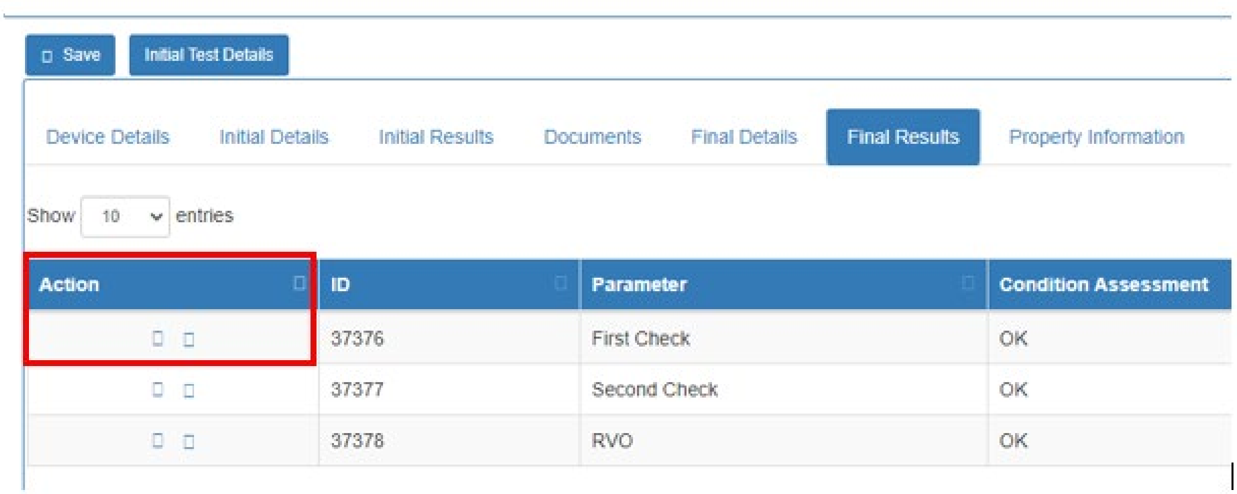
Under the “Final Test Details”, enter the “Final Test Date”, Final is Passed?”, Tester Name, and Gauge.



Click on the “Final Results” tab.



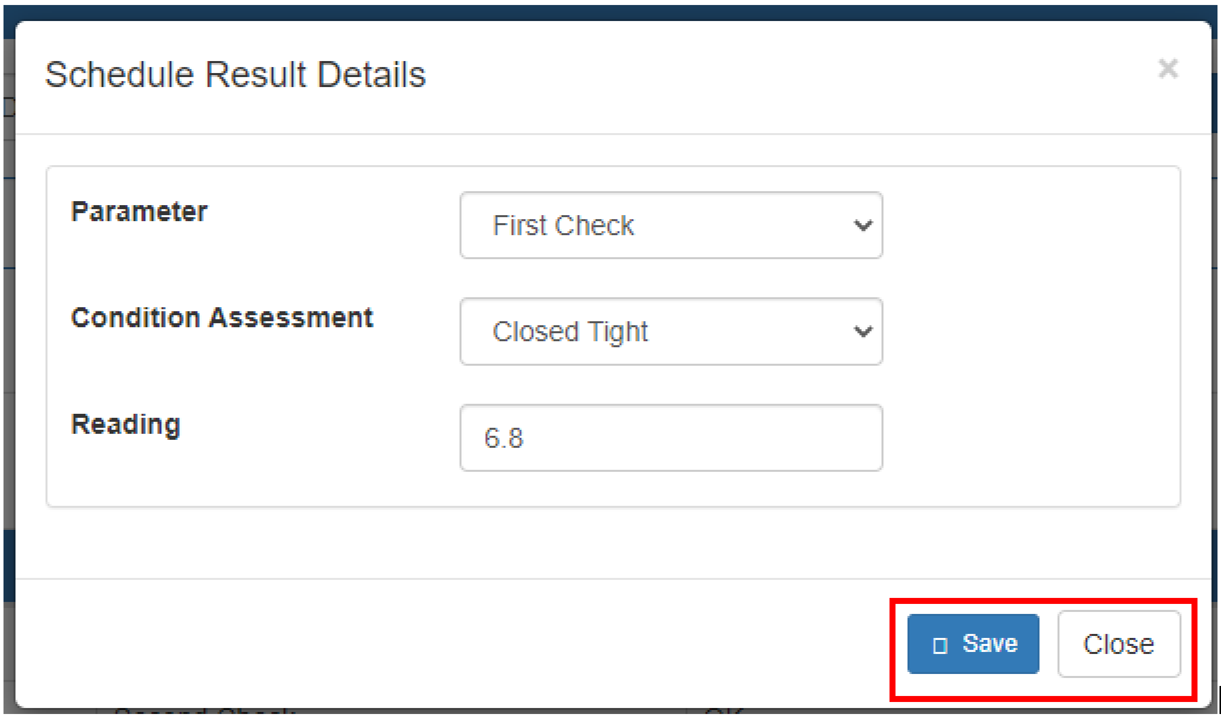
Click the box under the “Action” column to enter the results for the first check valve.



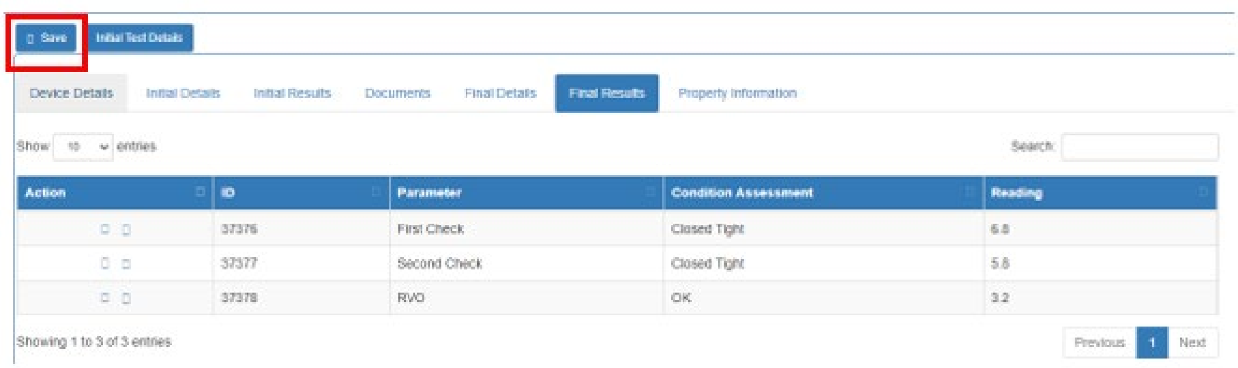
On “Schedule Results Details” click “Condition Assessment” and enter the condition of the first check valve.

After entering the Condition Assessment of the first check valve, enter the Reading for the first check valve and select “Save” and close the pop up.

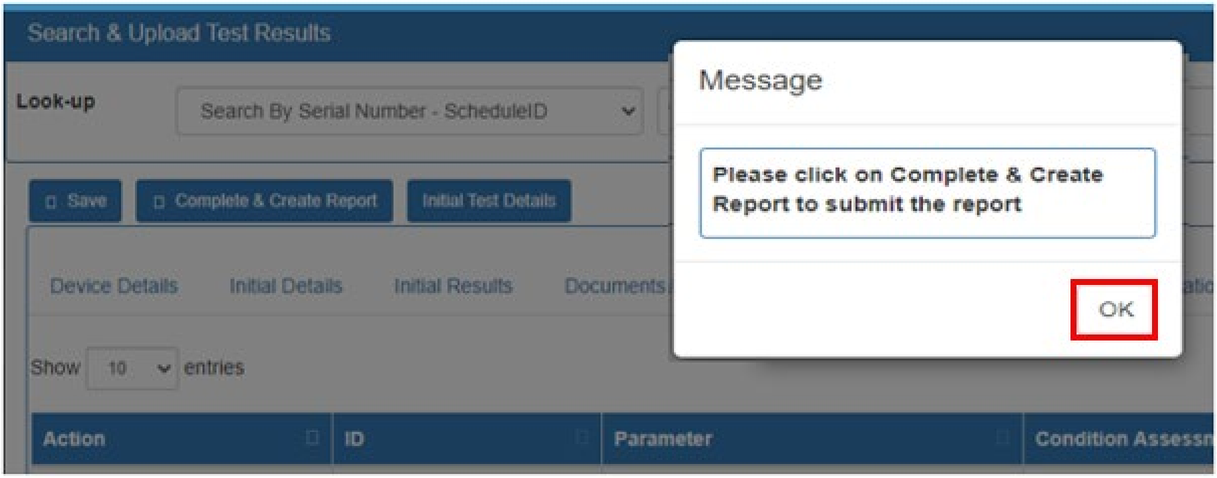
Follow the procedure for the second check and the relief valve. When done, click on “Save” and “Close”.



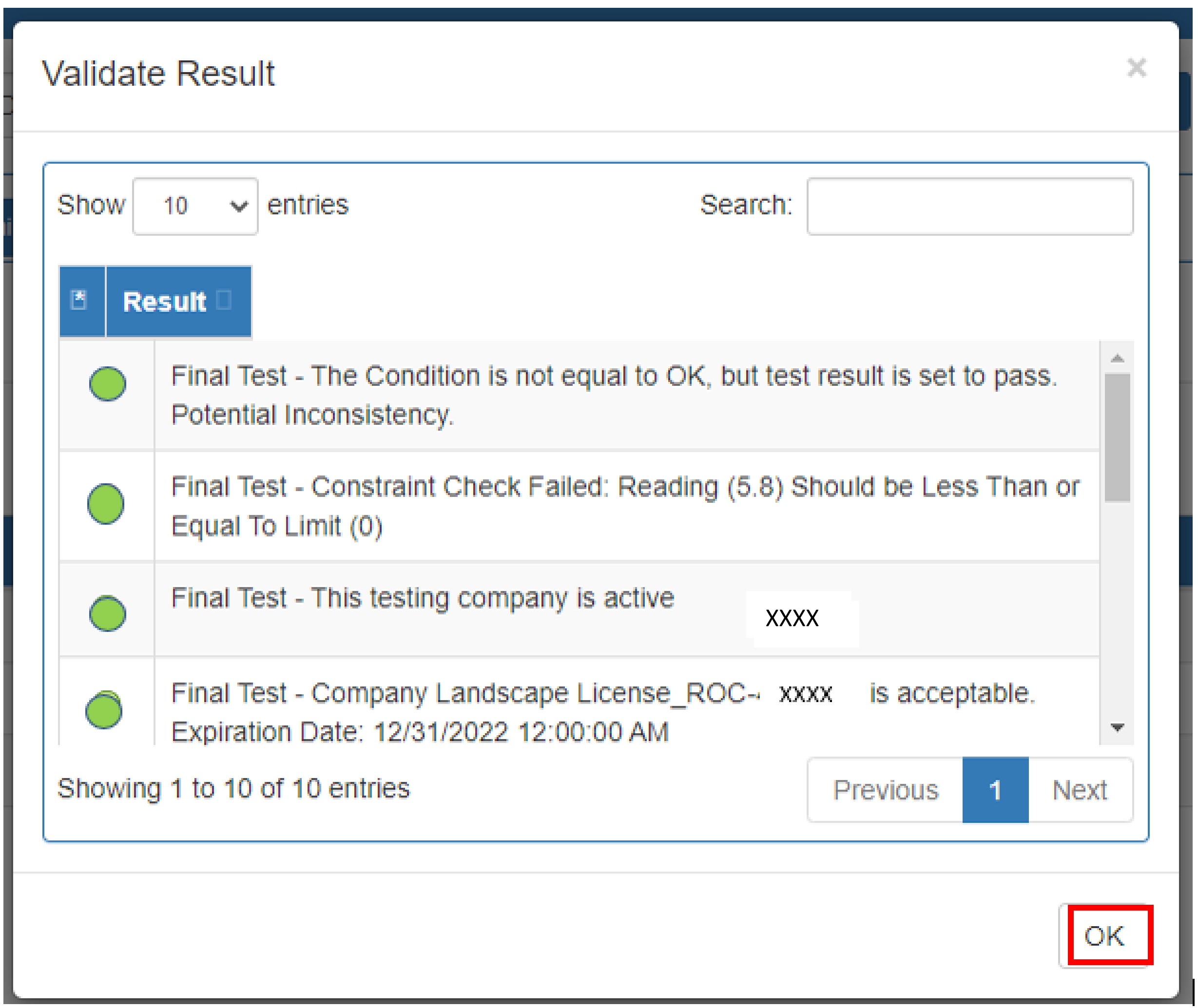
Once all the values are in Click “Save”.



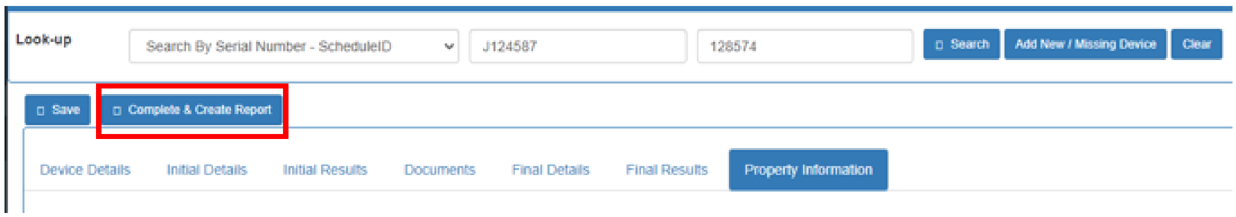
The following message will pop up, click “OK”.



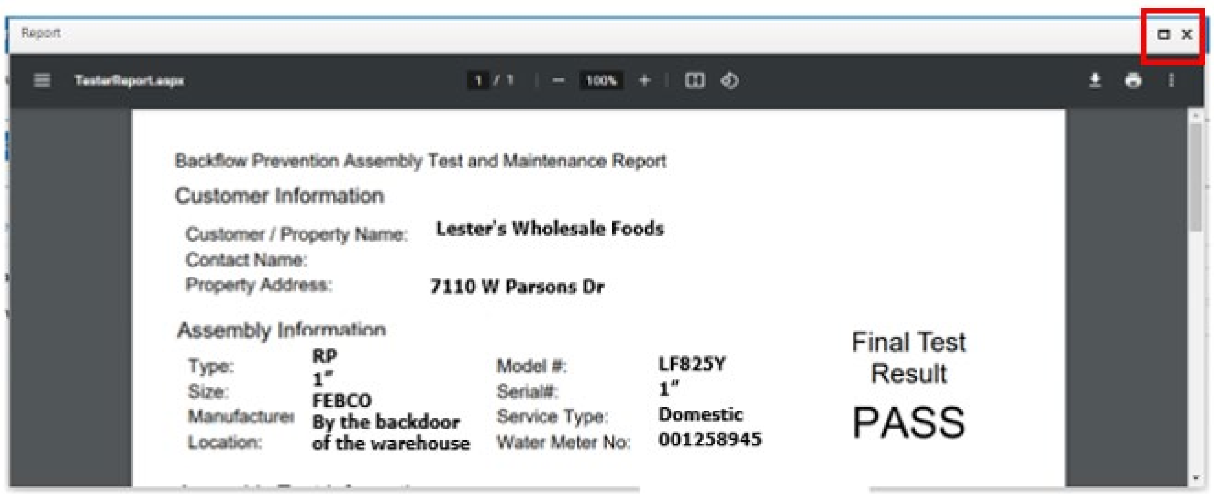
The “Validate Result” will pop up. Review and click “OK”.



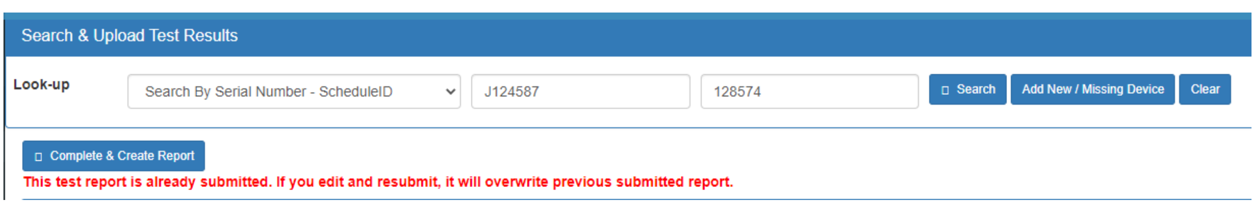
Click “Complete & Create Report”.



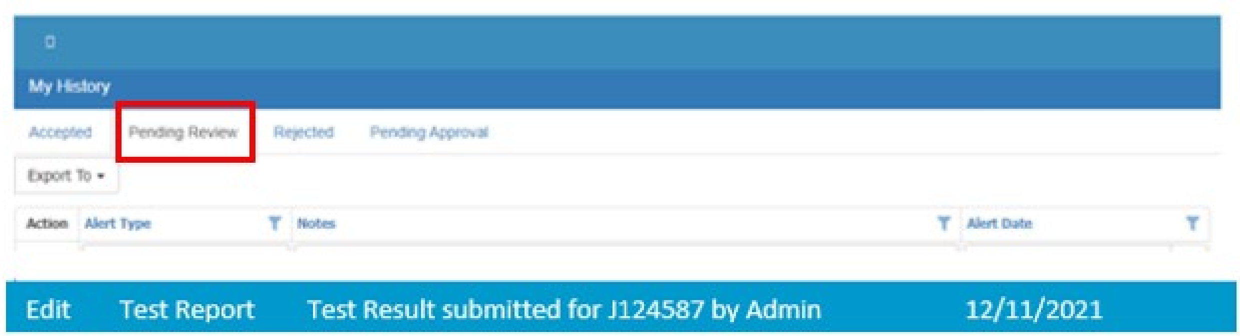
The report may be printed out or downloaded. Click “X” box in top right corner to exit.



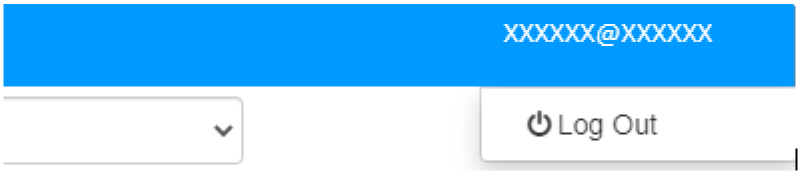
The following warning will appear. This indicates the report was submitted to the jurisdiction and is pending approval.



You may also confirm pending approval from the jurisdiction by looking in “MY History” under “Pending Approval” tab.

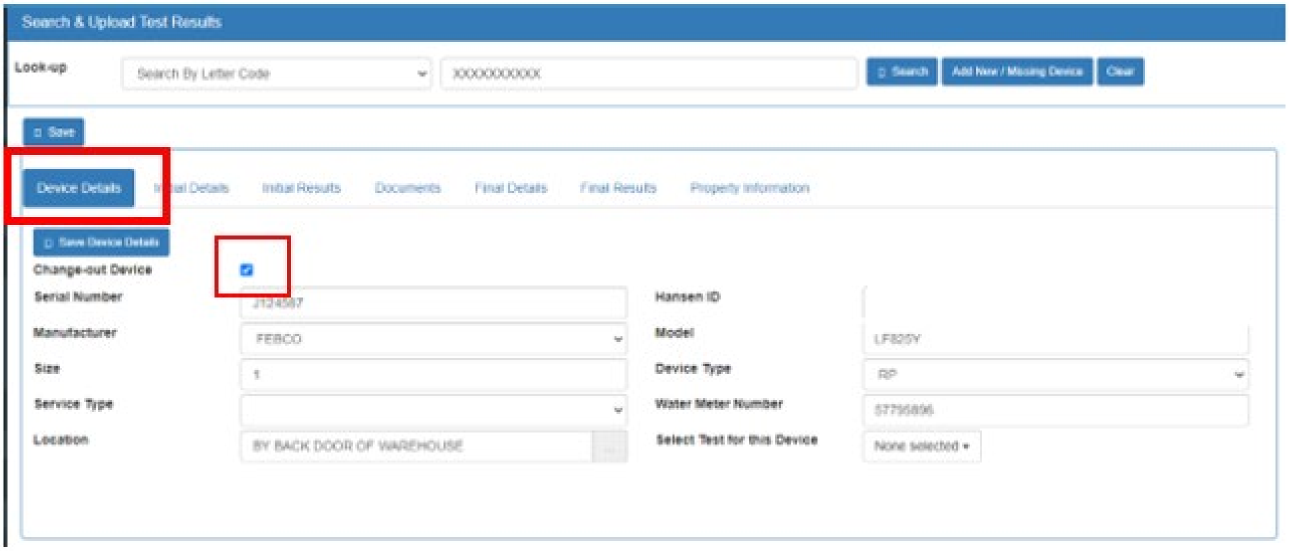


Once completed, log out of SAMS Universal Portal by clicking on login name, at the top right, click on "Log Out".

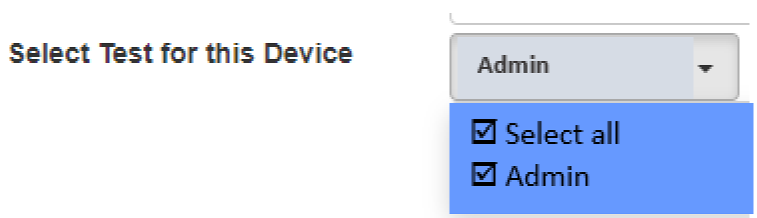


Changing out a Device in SAMS Universal Portal

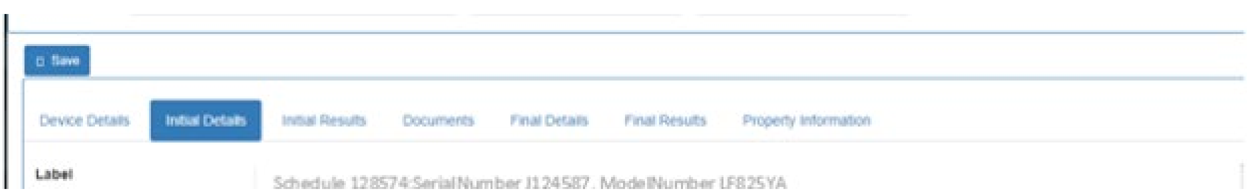
When a device is changed out in SAMS Universal Portal, the user will enter the details of the new device in “Search & Upload Test Results”. Click “Device Details” and check “Change-out Device.



Enter Serial Number, Manufacturer, Size, Model, and Device Type for the new device. Once done, click “Select Test for this Device” at the bottom right of the window.



Click “Initial Details” tab and follow the procedure for entering a passing test report.



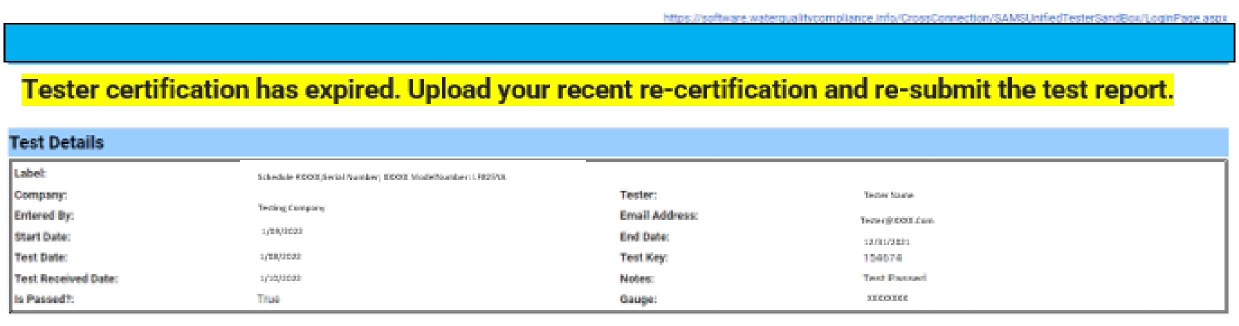
Rejected Tester or Company information

Below are a few reasons that a jurisdiction may reject test reports or company/tester information:

- Tester certification has expired
- Tester gauge has expired
- Company insurance (if required by jurisdiction) has expired
- Company city license (if required by jurisdiction) has expired
- Company Registrar of contractor license (if required by jurisdiction) has expired
- Sufficient documentation was not uploaded into SAMS Universal Portal
- Test results on test report are incorrect

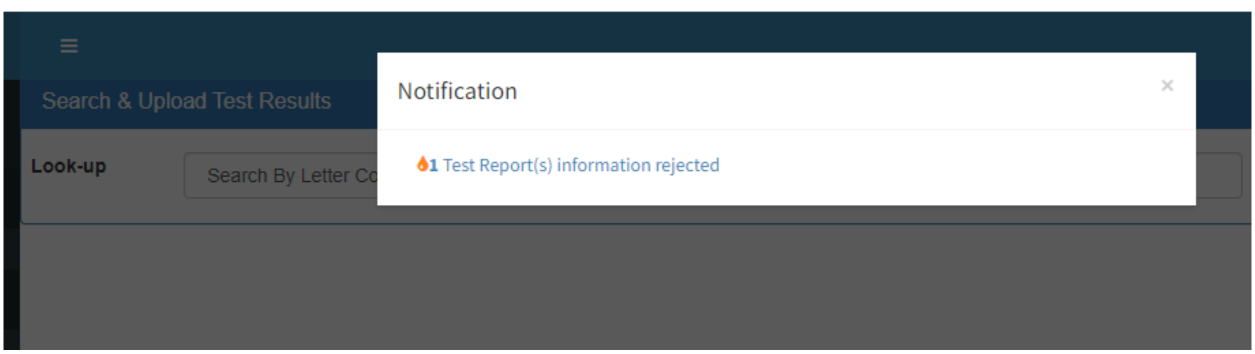
When the jurisdiction receives test reports or company information, they look at the information and either accept it or reject it. If the information is accepted, the status will appear under the users "Accepted" tab in My History. If the information is " rejected", the status will appear under the "Rejected" tab in My History.

Once information is "rejected" by a jurisdiction, the user will be sent an email indicating why the submitted information was rejected.

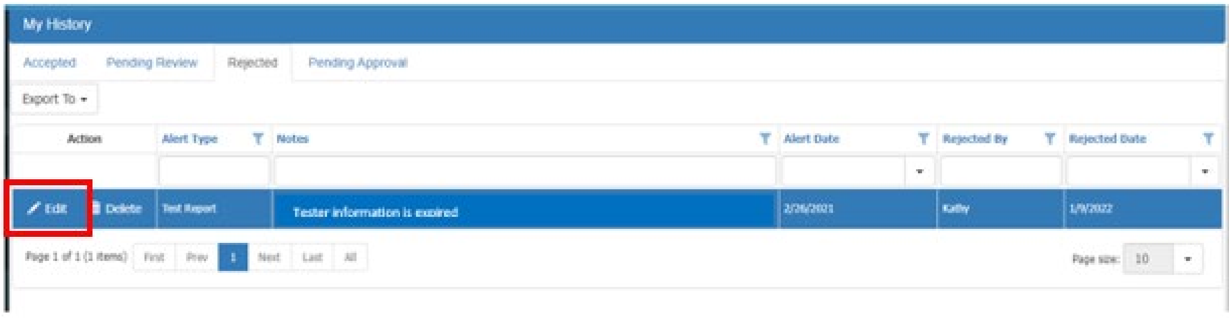


Once the user receives the email and logs into SAMS Universal Portal to make the corrections, the following notification pop up will appear.

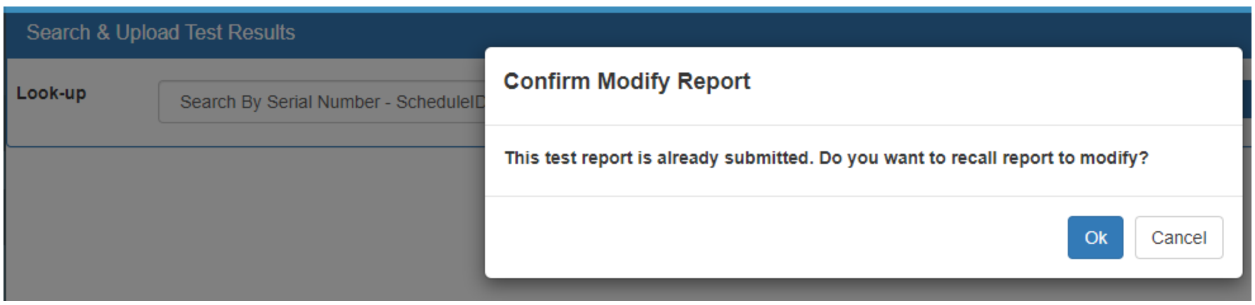
Click on the "Test Report (s) information rejected" and the user will be automatically sent to the "Rejected" tab in My History. In this scenario, the rejection was for an expired tester certification.



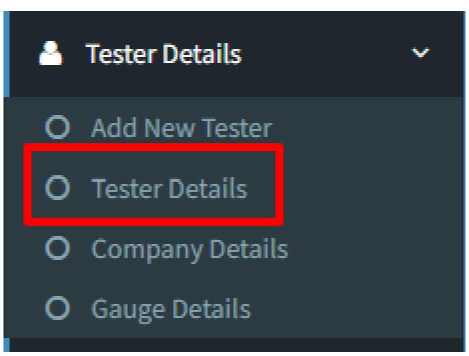
Click on Edit



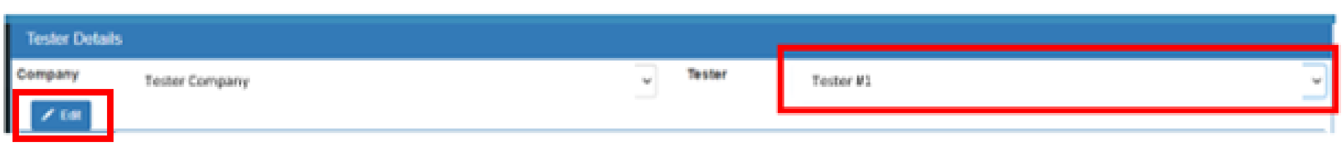
“Confirm Modify Report” will pop up, click “OK”.



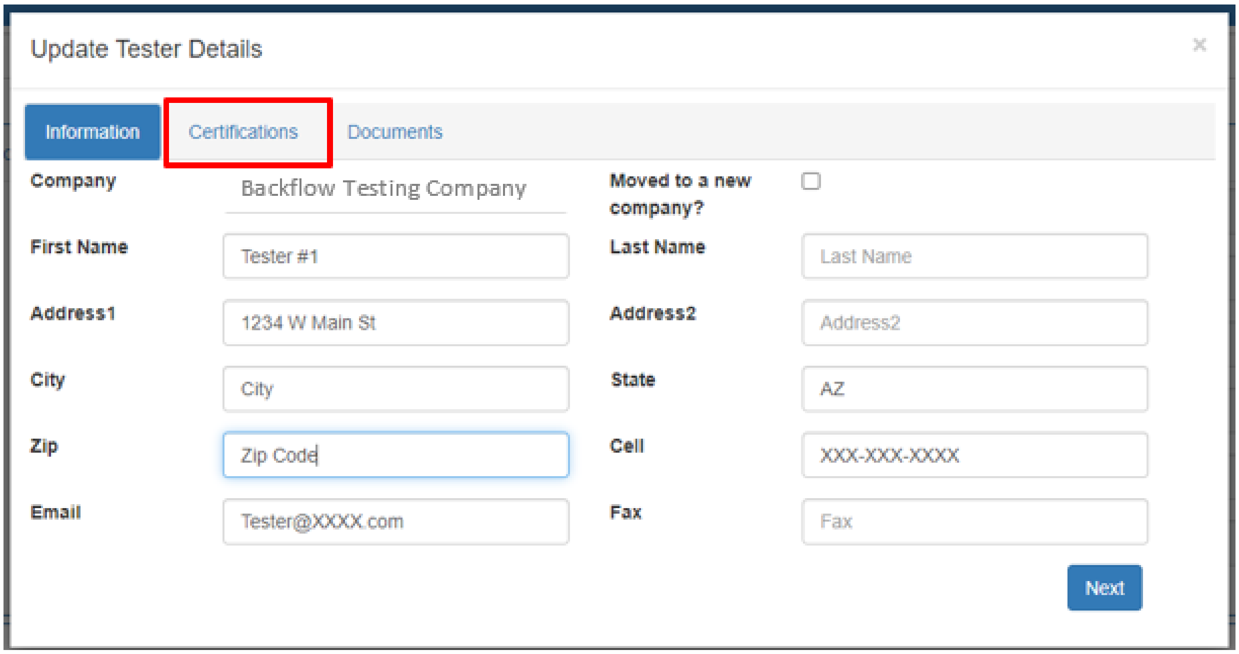
Once in the portal, click Tester Details



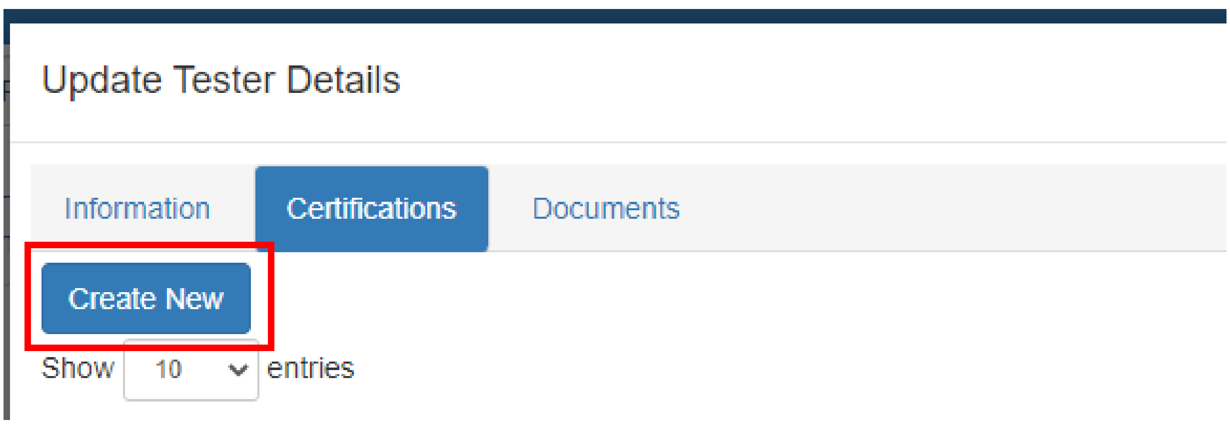
From the drop down, choose the correct tester to update, and click “Edit”.



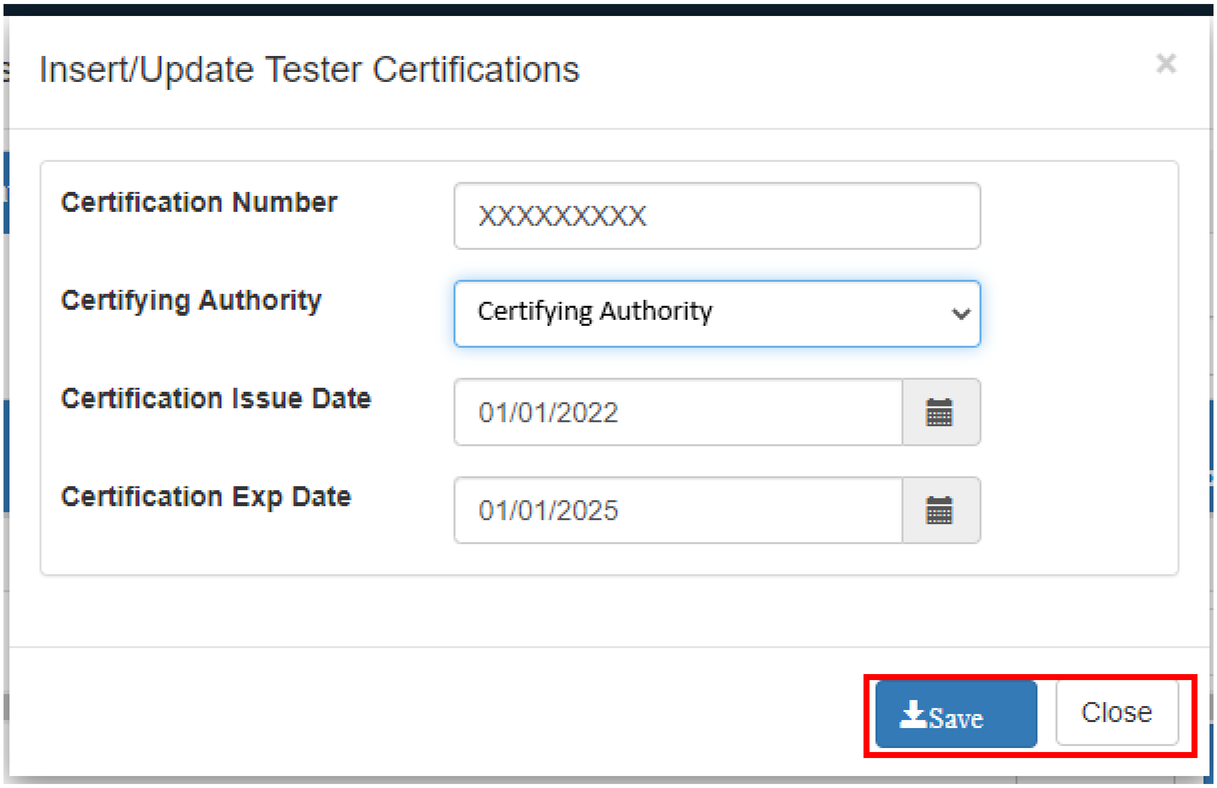
The “Update Tester Details” will pop up, click “Certifications”



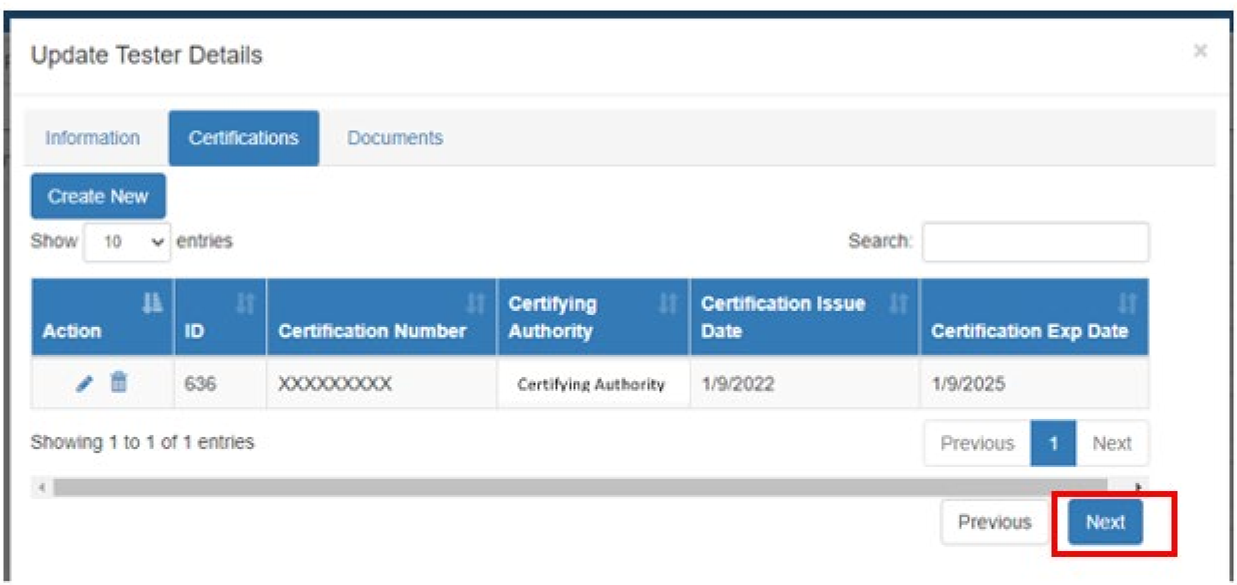
Click “Create New”



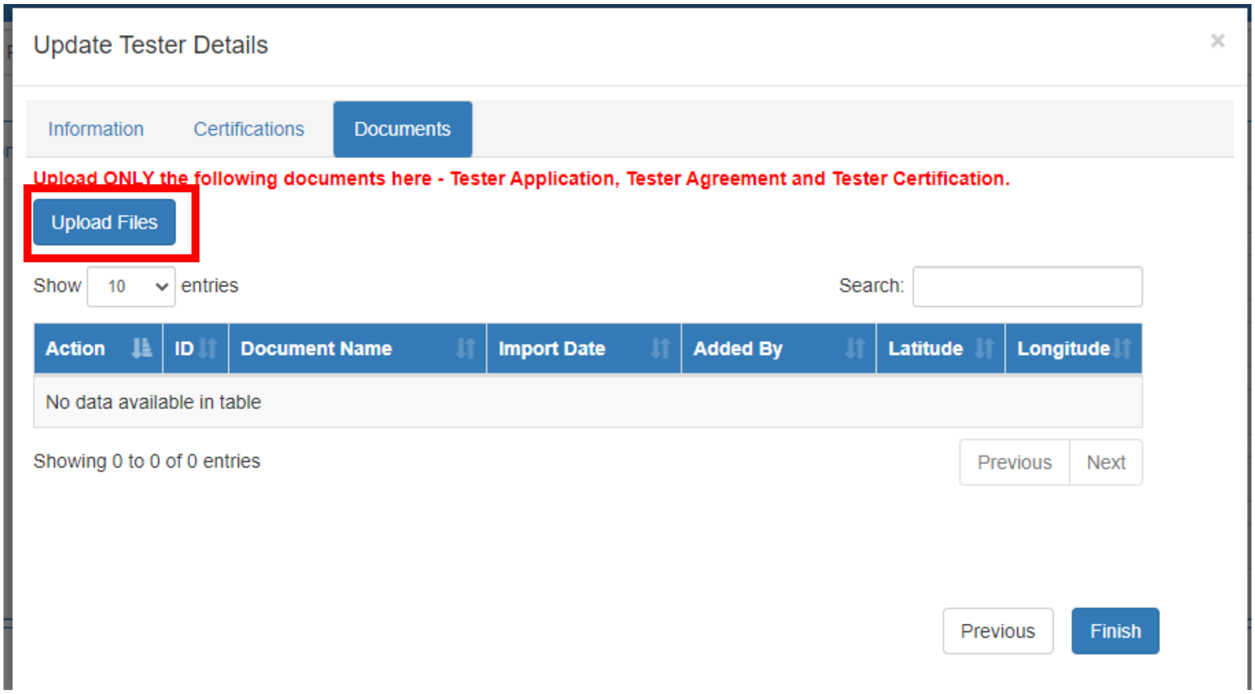
In the “Insert/Update Tester Certifications”, enter the new tester credentials, save and close window.



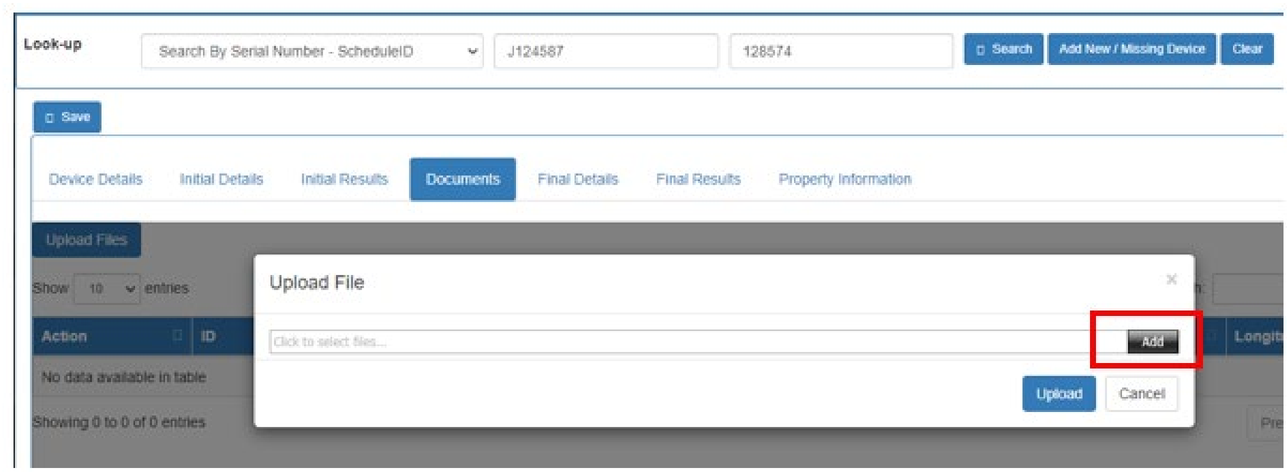
The user will be taken back to the “Update Tester Details”, click “Next”.



The user will Upload the copy of the new certification for the tester. Click “Upload Files”

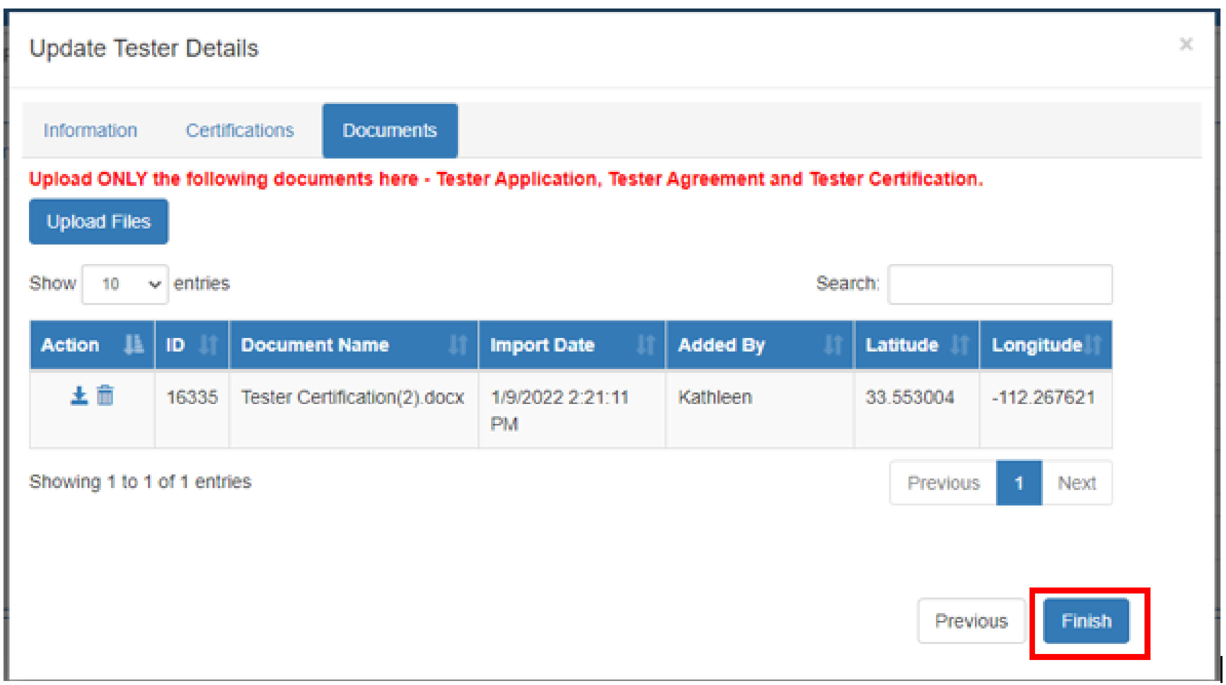


Click “Add”



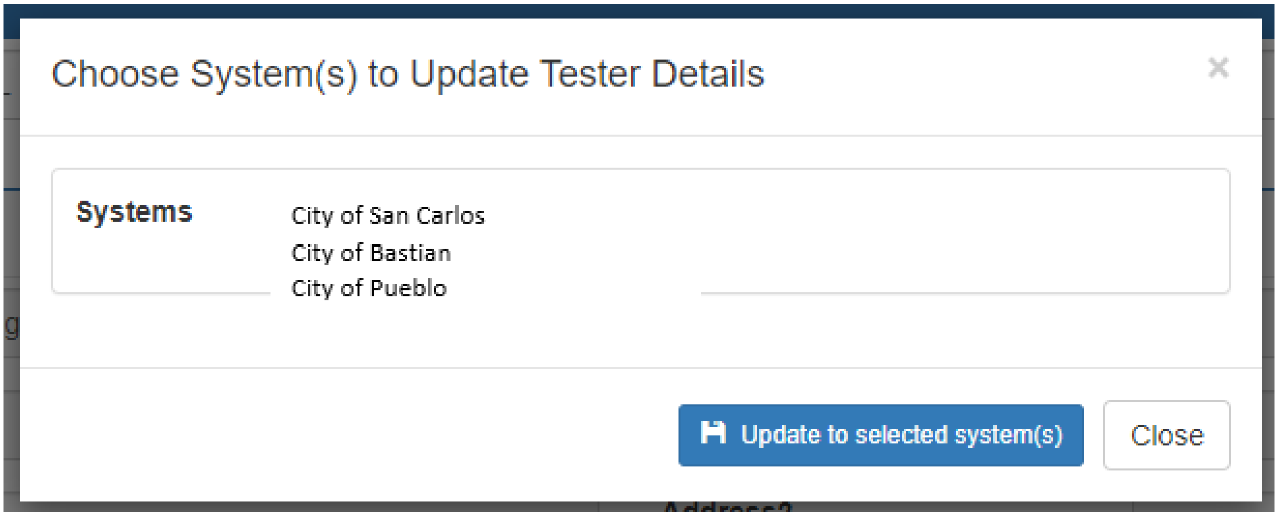
Once the file is added, click “Upload”.

Your file has been uploaded, click “Finish”

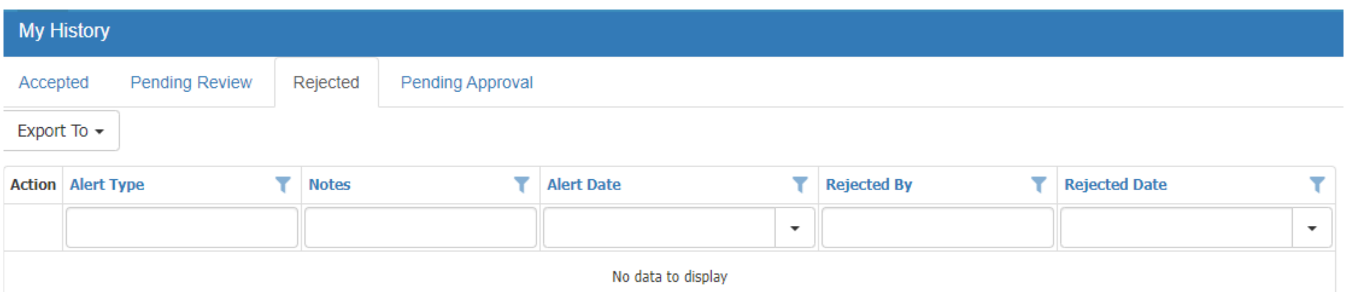


“Choose System(s) to Update Tester Details ” will pop up. When the drop down under “Systems” is clicked the user will be given a menu of other jurisdictions to choose from. When chosen, the tester will automatically be sent to the other jurisdictions for approval. This eliminates entering the information numerous times.

When done, close the window.



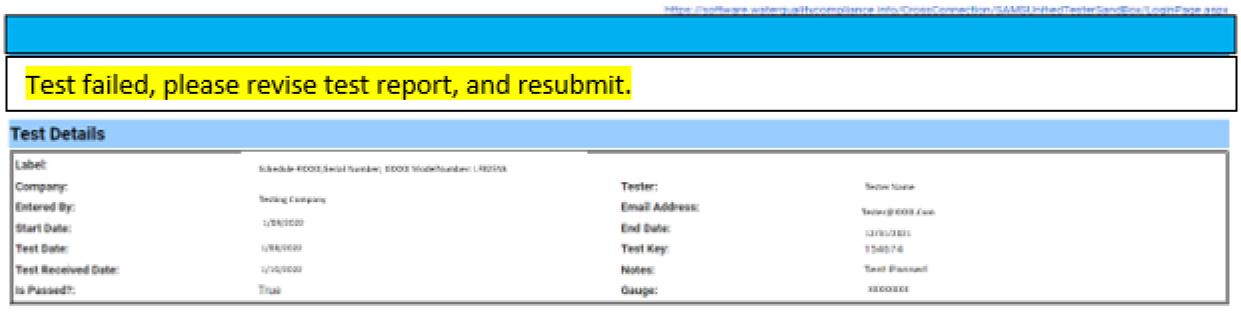
The tester update has been sent to the jurisdiction for approval, the “Rejected” tab will be empty.



Rejected Test Reports

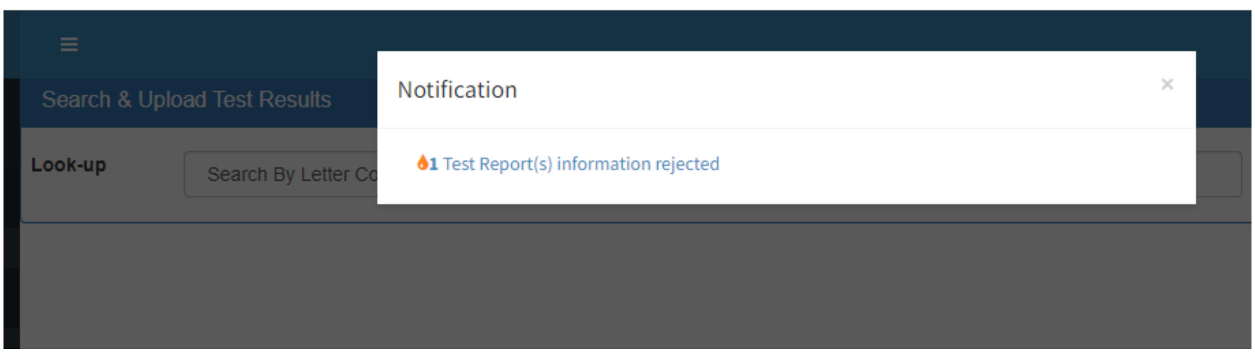
When the jurisdiction receives test reports, they look at the information and either accept it or reject it. If the information is accepted, the status will appear under the users "Accepted" tab in My History. If the information is " rejected", the status will appear under the "Rejected" tab in My History.

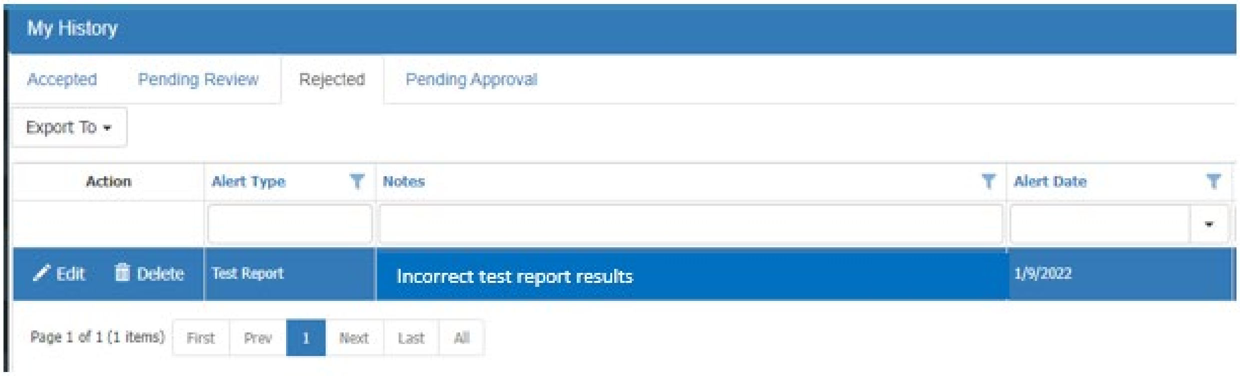
Once information is "rejected" by a jurisdiction, the user will be sent an email indicating why the submitted information was rejected.



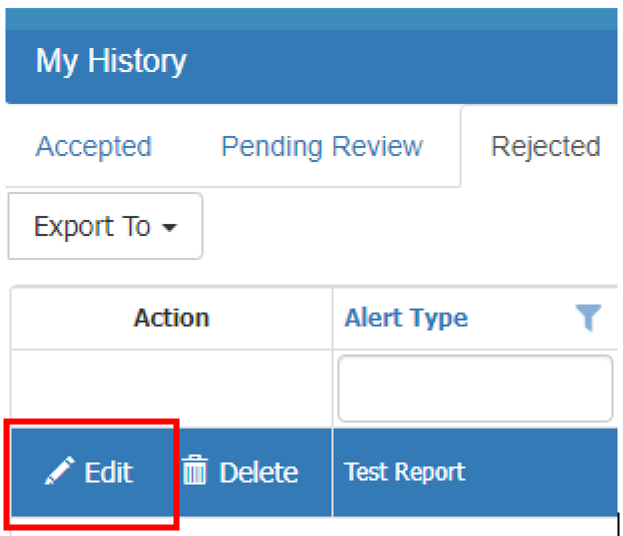
Once the user receives the email and logs into SAMS Universal Portal to make the corrections, the following notification pop up will appear. Click on the "Test Report (s) information rejected" and the user will be automatically sent to the "Rejected" tab in My History.

In this scenario, the rejection was a test report that had incorrectly been submitted as "passing" but should have been submitted as "failed".

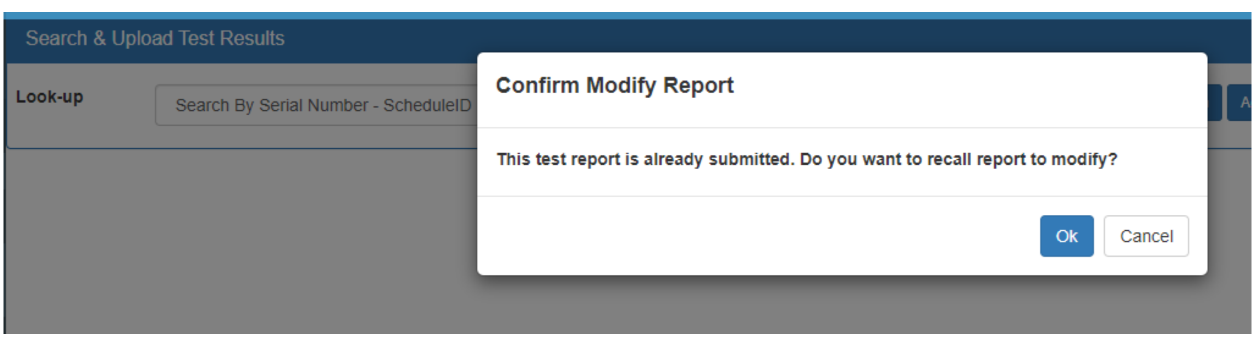




Click “Edit”

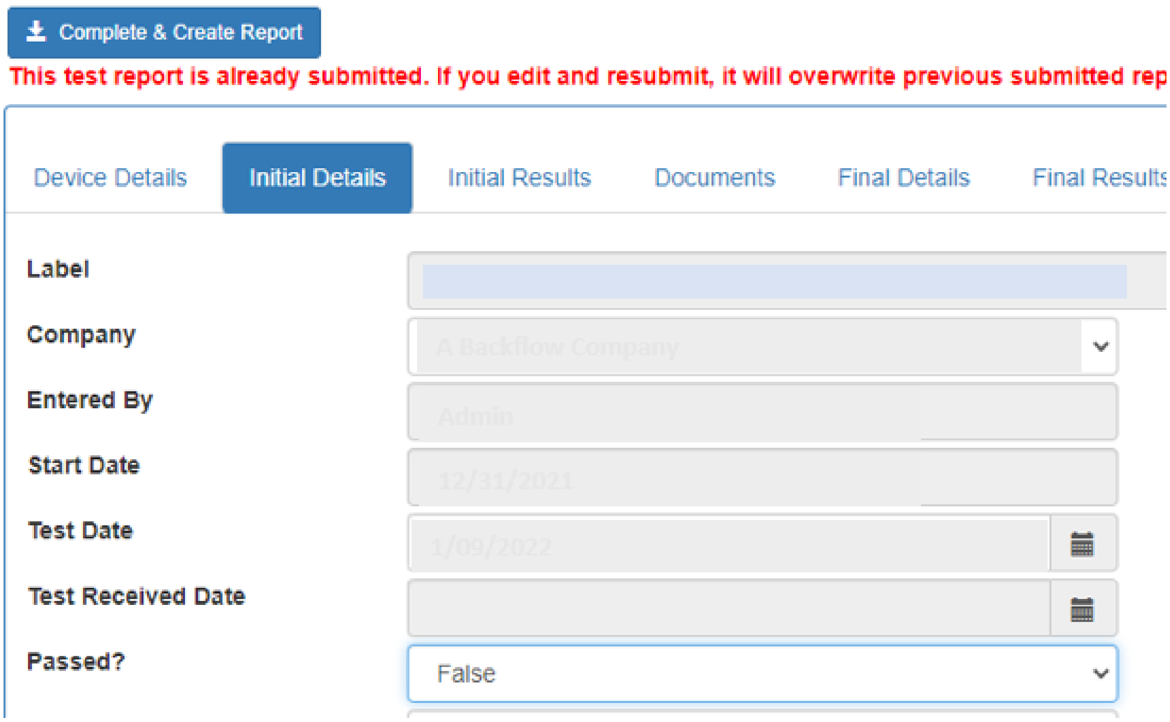


“Confirm Modify Report” will pop up, click “OK”

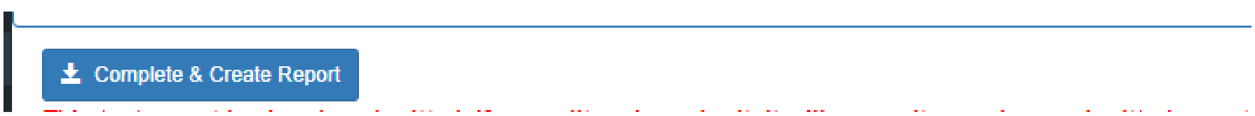


The following warning will appear. It is there to remind you that any changes you make will overwrite the results that were previously entered.

Click on the “Initial Details” tab and from the drop down under “Passed”, click “False” to indicate the test failed.



Once done, click “Complete & Create Report”.



The test report will indicate “Failed”, and the user will get verification the test report has been submitted successfully. Close the test report. The test report has been re-submitted to the jurisdiction.

The updated test report has been sent to the jurisdiction for approval, the “Rejected” tab will be empty.