**Guidance Document: Commercial**

Tracking Sheet





1. **Introduction – What is the tracking sheet?**

1.1 The tracking sheet contains details of all Commercial samples entered within LIMS, where eligible samples are defined on the system by an associated customer ID property.

1.2 This sheet makes locating any sample taken within the current year simple, as samples are tracked from the point of receival, to their invoice.

1.3 Exceptions to these rules include the following samples:

* **Catchment** – Who schedule and retrieve data from the same database, not requiring data retrieval by the Commercial team.
* **Docks’ Bathing Beaches** – These reports returned by Alpha are directly sent on to the relevant customer.

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**2.0 User guidance**

2.1 Sample information is recorded in stages. First, information relating to the sample is recorded by the individual receiving some work, and secondly, alerts sent out regarding the sample are recorded by the Administrator.

2.2 The following sample variables are stored within this sheet:

Data entered upon receival:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Dimension | Shorthand | Column | Reason | Example Entry |
| Sample Number | Sample No | A | Unique ID generated by LIMS | 2681234  *(Numeric)* |
| Receival Date | Date Received | B | Date of when the sample was entered on LIMS | 01/01/2025  *(Date/Time)* |
| Customer ID | Customer | D | For which customer will this report return to | AFFINITY\_W  *(String)* |
| Received by | Booked by | E | Who registered this sample on LIMS | CHEMIST1  *(String)* |
| Sampled by | Sampled by | F | Who collected this sample (if applicable) | SMITH, J.  *(Optional string)* |
| Resample Status | Resample | G | Was this a resample of a previous sample? | Y/ N  *(Optional string)* |
| Weekend Status | Weekend Work | H | Was this sample received on Saturday or Sunday? | Y/ N  *(Optional string)* |
| Sub-con Test Status | Sub-Con | I | For UKAS, were there any subcontracted tests included in the suite? | Y/ N  *(Optional string)* |
| Analysis Suite | Analysis Details | J | Which suite was used, or Which bottles were taken | RE\_AFFBAC  *(String)* |
| Description of Work | Description | U | The site location in full | 123456, STAINES LAB, 1ST FLOOR, KITCHEN, CWS  *(String)* |

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Fields updated post-receival:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Dimension | Shorthand | Column | Reason | Example Entry |
| Subcon Result Status | Subcon Received | K | Have the results from the subcontracted lab been entered? | Y/ N  *(Optional string)* |
| Date of Authorised On-Site Tests | Auth Date | L | Date of when the on-site results were authorised | 01/01/2025  *(Date/ Time)* |
| Initials of Authoriser | Auth Initials | M | Who authorised the results? | CHEMIST1  *(String)* |
| Date of Test Report Generation | Report Date | N | Date of when the report was generated | 01/01/2025  *(Date/ Time)* |
| Initials of Test Report Generator | Report Initials | O | Who generated the test report? | CHEMIST1  *(String)* |
| Date of Supplementary Report Generation | Supp Date | P | Date of when the supplementary report was generated | 01/01/2025  *(Date/ Time)* |
| Initials of Supplementary Report Generator | Supp Initials | Q | Who generated the supplementary report? | CHEMIST1  *(String)* |
| Cancellation Status | Cancelled Sample | R | Was this sample cancelled post-receival? | Y/ N  *(Optional string)* |
| Upload Status | LabPortal | S | Has this report been uploaded? | Y/ N  *(String)* |
| Invoice Status | Invoiced | T | Has this sample been invoiced? | Y/ N  *(String)* |
| Failure Notification(s) | PCV Failure | V | What exceedances have been recorded? | 3-day plate count 22C  *(String)* |
| Non-Conformance Notification(s) | Non-Conformance | W | What non-conformances have been recorded? | Insufficient sample for XYZ test  *(String)* |

Calculated features:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Dimension | Shorthand | Column | Reason | Example Entry |
| Number of working days from receival to report | Working Days | C | Turnaround time information | 4  *(Numeric)* |
| Total number of days from receival to report | Total Days | Y | Turnaround time information | 6  *(Numeric)* |

2.3 The formulae used for both calculated fields were as follows:

Working Days = IF ( ISBLANK ( [@[Cancelled Sample]] ),

IF ( ISBLANK ( [@[Date Received]] ),

"",

IF ( ISBLANK ( [@[Report Date]] ),

NETWORKDAYS ( [@[Date Received]], TODAY () ) -1,

NETWORKDAYS ( [@[Date Received]],

[@[Report Date]] ) -1

)

),

""

)

Total Days = IF ( ISBLANK ( [@[Cancelled Sample]] ),

IF ( ISBLANK ( [@[Date Received]] ),

"",

IF ( ISBLANK ( [@[Report Date]] ),

DAYS ( TODAY (), [@[Date Received]] ),

DAYS ( [@[Report Date]], [@[Date Received]] )

)

),

""

)

These scripts achieve the goal by re-calculating how many days it has been since the sample was received.

A diagram of a flowchart

Description automatically generated Overview of the decision tree:

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2.4 Conditional formatting has also been applied to highlight certain aspects of the entries more clearly.

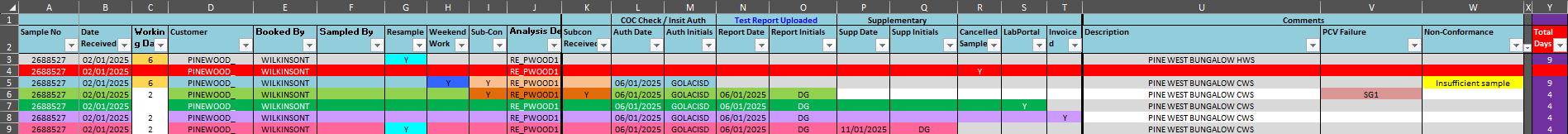
These highlighted features include cancellation status, weekend status, failure and non-conformance comments, invoicing status, resample status, sub-con test statuses, report dates, authorization date, and formula breakpoints, in this order of priority.

Conditional formatting rules manager:

A screenshot of a computer

Description automatically generated

Application:



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**3.0** **Appendix**

3.1 Current tracking sheet.

First half:

A screenshot of a computer

Description automatically generated

Second half:

**A screenshot of a computer

Description automatically generated**