

## Purpose of this QRG

- To teach you how to create a Lab Alert Definition in the OLT

## Intended Audience for this QRG

- Area Managers and Restriction Reporting Administrators (Oil Sands) in the OLT



## Purpose of Lab Alert Definitions in the OLT

- To describe the schedule, in the OLT, by which lab samples need to be taken and evaluated

## Prerequisites

- You must have access to the OLT software application
- You must have an Area Manager or Restriction Reporting Administrator (Oil Sands) role in the OLT to complete the procedure described below


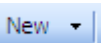
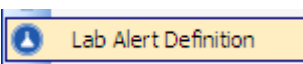
## Helpful Hints

- You must create a Lab Alert Definition *before* OLT will trigger the related Lab Alert
- Lab Alert Definitions describe how many samples need to be taken, when and how often
- Lab Alert Definitions trigger corresponding Lab Alerts
- Lab Alert Definitions can have the following statuses: Valid or Invalid Tag (Note: after several attempts, a special status of "Invalid Tag" is set by the system when the tag is unavailable in the site's Plant Historian.)
- The 'status' is displayed in the Status column of the Lab Alert display grid
- Lab Alert Definitions can be either Active  or Inactive 
- Hover over icons to view their meaning

## Procedure



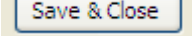
Lab Alerts

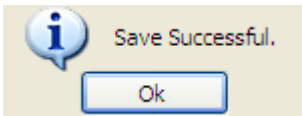
- On the navigation pane, click Lab Alerts icon  to navigate to the Lab Alerts screen.
- Click tiny drop-down arrow next to New button  (located on the top left-hand side of your screen) to activate the drop-down menu.
- Choose Lab Alert Definition  to navigate to the Create Lab Alert Definition screen.
- Complete the following fields:

Field	Sub-Steps/Description
Lab Alert Definition Name	<p>Type a descriptive name for the Lab Alert.</p> <p>For example, type UP1 Phenol Samples</p> <p><i>Note:</i> Be descriptive enough to differentiate this lab alert definition from others.</p>

Description	Type a sentence or two describing details of the required lab alert. Be sure to include any specific actions that should be taken if a sample is missed/an alert is generated. For example, type 'Ensure that phenol tests are performed. If an alert is generated: contact the lab, notify your area manager, and take a new sample.'
Functional Location(s)	<div>Functional Location</div> <div><input type="text"/></div> <div>Browse ...</div> <p>Click Browse ... button <input type="text"/> to add a Functional Location(s) for the Lab Alert.</p> <p>Click to choose desired Functional Location(s).</p> <div>Accept</div> <p>Click Accept button <input type="text"/> to accept your selection.</p>
Tag	<div>Tag</div> <div><input type="text"/></div> <div>Tag Search</div> <p>Click Tag Search button <input type="text"/> to select a tag to monitor for the Lab Alert.</p> <p>Click to choose desired Tag.</p> <p><i>Note: Tags vary by location.</i></p>
Schedule Type	<p>Click drop-down arrow in the Schedule Type box</p> <div>Schedule Type</div> <div>Recurring Daily</div> <div>▼</div> <p>to select a schedule type for the Lab Alert</p> <p>Click to choose desired Schedule type.</p> <p><i>Note: The Schedule Type dictates what time and how often the related Lab Alert Definition will evaluate a particular tag for samples.</i></p> <p><i>Schedule Type can be set to: Recurring Daily; Recurring Weekly; Recurring Monthly (by date); or Recurring Monthly (by weekday).</i></p>
Recurrence Pattern	<div>Recurrence Pattern</div> <div>At 12:00:00 AM</div> <div>▼</div> <p>Click drop-down arrow in Recurrence Pattern box <input type="text"/> to select time to trigger the Lab Alert Definition evaluation.</p>
Range	<div>1</div> <div>sample(s)</div> <p>Fill in number of samples to be checked <input type="text"/> to indicate how many samples are required.</p> <p>Set From: <div>From : 12:00:00 AM</div> to select desired start of the range to check for samples.</p> <p>Set To: <div>To : 12:00:00 AM</div> to select desired end of the range to check for samples.</p>
Temporarily Inactive	<p>Click check box next to Temporarily Inactive <input checked="" type="checkbox"/> Temporarily Inactive to deselect the checkbox.</p> <p><i>Note: The Temporarily Inactive function allows you to draft a Lab Alert</i></p>

	<i>Definition and have it sit until it is ready to be activated.</i>
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5. Click Save and Close button  to save your work and close the Create Lab Alert Definition screen.

6. Click OK button  to acknowledge your work was successfully saved.