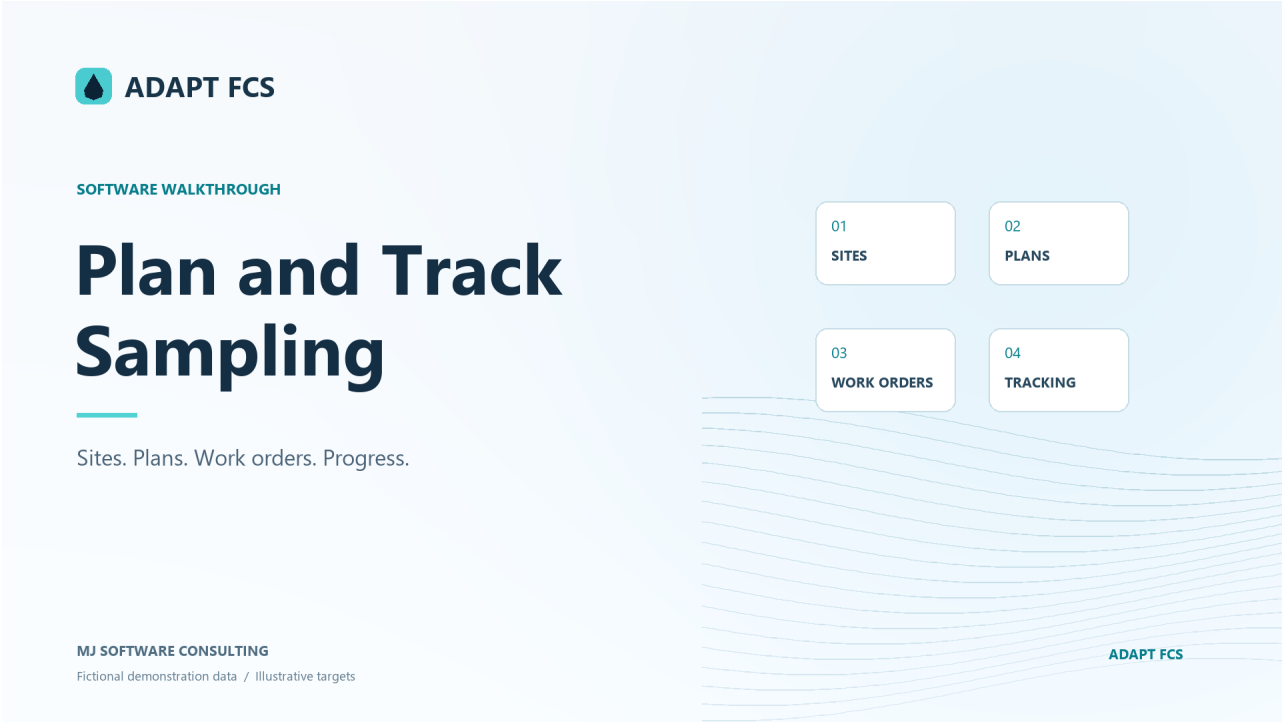
Plan and Track Sampling

Identify sampling sites, review plans, prepare manual work orders, assign collection work, and track progress through filters, route queues, charts, and related samples.

Version 1 | Narration and screenshots | 6 minutes

Watch the video online
https://app.adaptfcs.com/videos/water-quality/plan-and-track-sampling.html



Introduction - 00:00

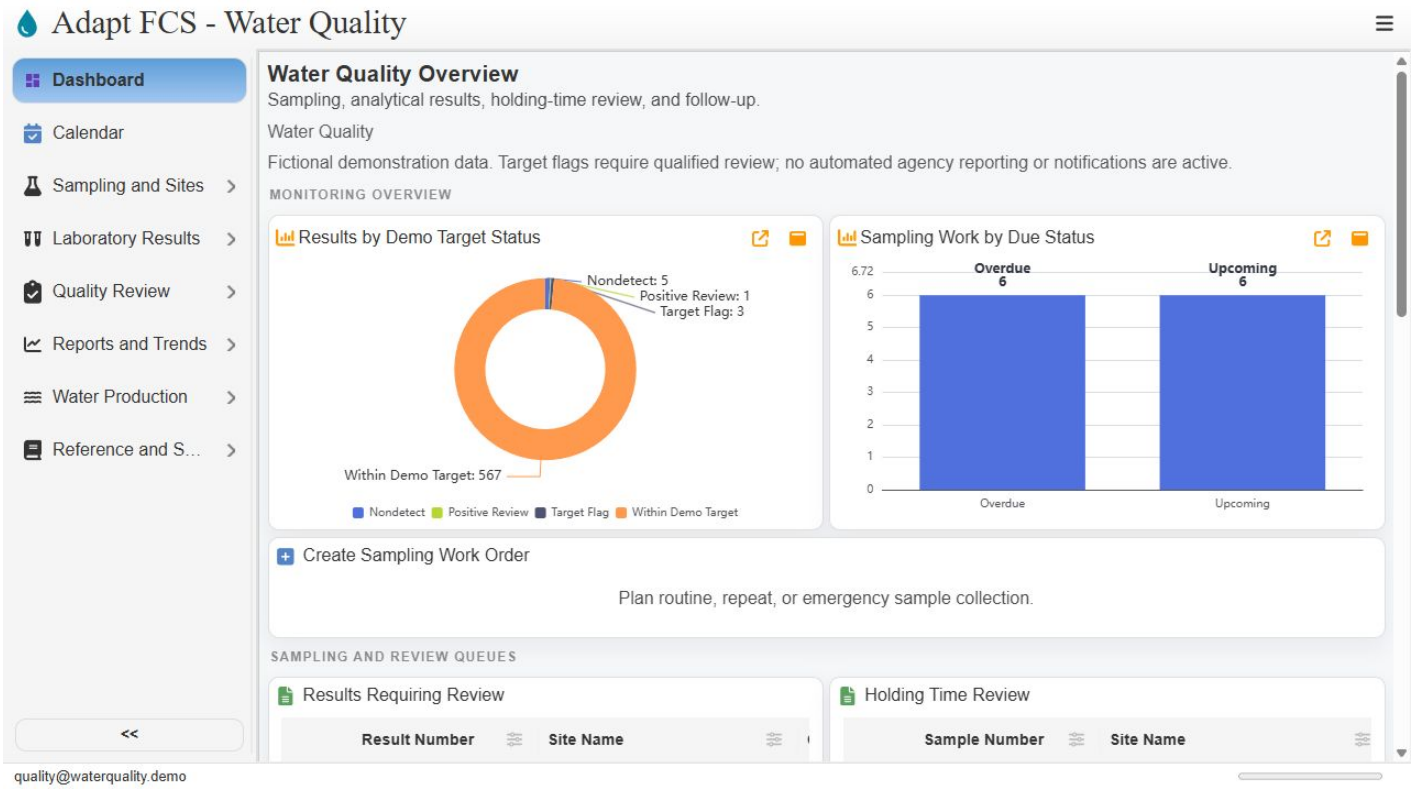
This walkthrough shows how to plan and track sampling in Adapt FCS. We will identify a site, review its sampling plan, prepare a work order, and use assignments, filters, queues, and collection history to follow the work. The demonstration uses fictional records.

This PDF contains the complete narration and relevant screenshots. The linked page includes the video, chapter controls, captions and downloads.

Fictional demonstration data and illustrative targets. This walkthrough does not determine regulatory compliance.

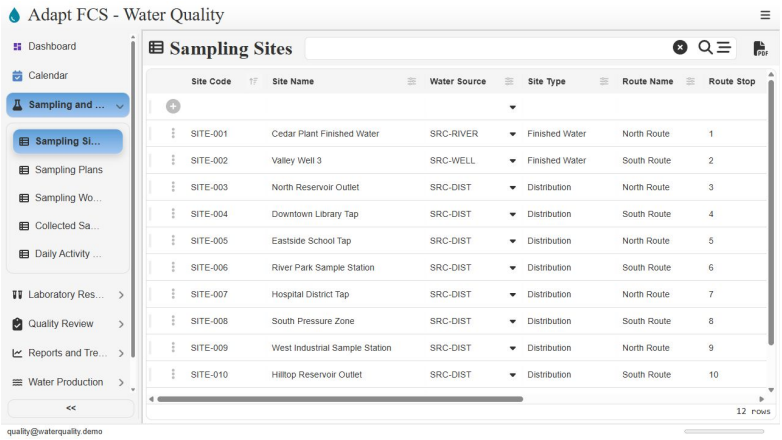
00:18 | Start with the sampling overview

Once signed in to the Water Quality workspace, start with the dashboard. The sampling chart summarizes recorded work by due status. The review areas below provide a route into more detailed records. In this walkthrough, we will follow the manual planning and tracking tools already present in the demonstration.



Use the dashboard to find the sampling work that needs attention.

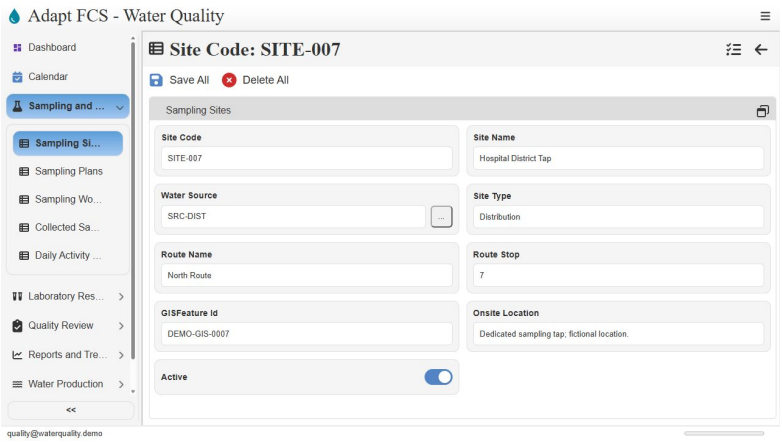
00:39 | Find the sampling site



Sampling and Sites > Sampling Sites

Open Sampling and Sites in the left menu, then choose Sampling Sites. The register lists site identifiers, names, water sources, site types, and route information. A consistent site identifier connects later plans, work orders, and collected samples. We will use Hospital District Tap, site zero zero seven.

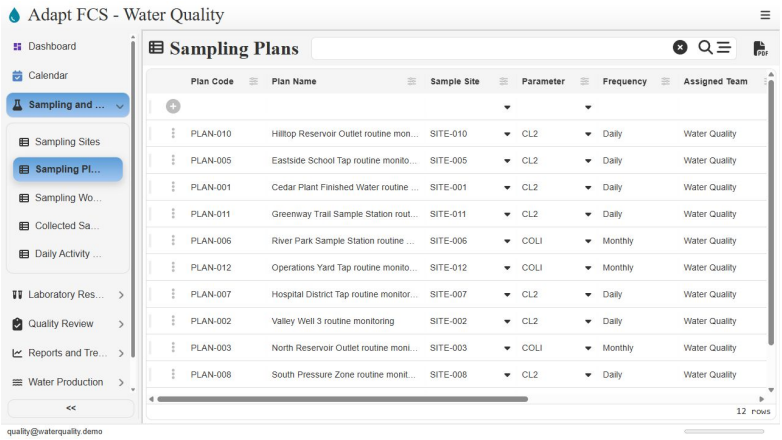
01:01 | Check the site's route information



SITE-007: Hospital District Tap, North Route, stop 7.

The site record identifies Hospital District Tap as a distribution site on the North Route, at stop seven. Its onsite location description helps staff identify the collection point. The GIS identifier in this demo is an example reference, not a live map connection. Verify the intended location before planning collection.

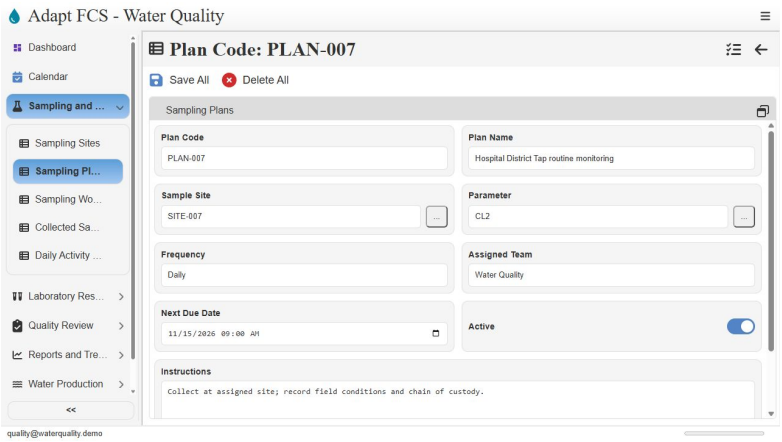
01:24 | Review the sampling plan register



Sampling Plans organize sites, parameters, frequency, team, and next due date.

Next, choose Sampling Plans from the same menu. Each plan brings together the site, parameter, descriptive frequency, assigned team, next due date, and instructions. This register helps staff review what is expected at each location. Open plan zero zero seven to inspect the plan for Hospital District Tap.

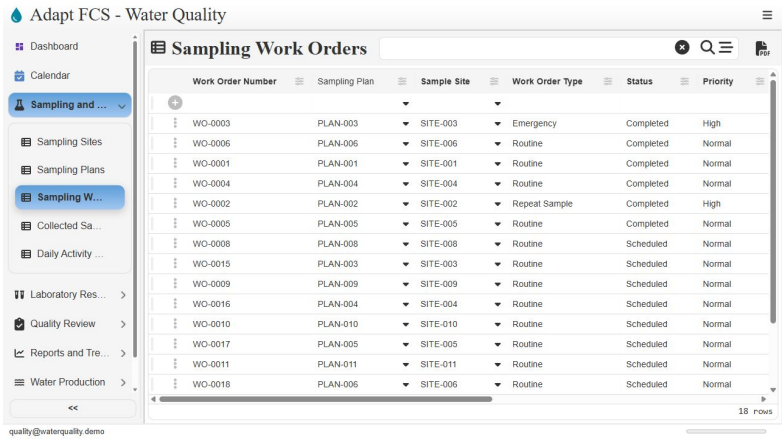
01:46 | Understand the plan's schedule fields



PLAN-007 records daily chlorine monitoring and the responsible team.

This plan links site zero zero seven to the chlorine parameter. It records a daily frequency, the Water Quality team, a next due date, and collection instructions. These are manually maintained planning fields. The frequency text does not create recurring work orders, and the next due date does not advance automatically in this demonstration.

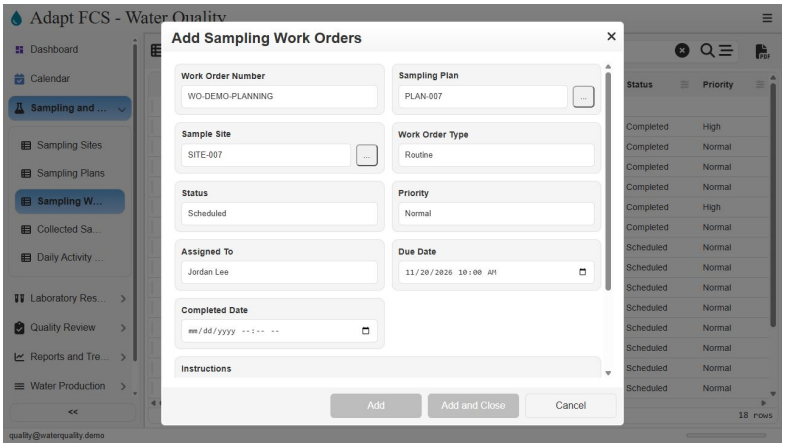
02:09 | Translate plans into collection work



Sampling Work Orders provide the register for individual collection tasks.

Choose Sampling Work Orders to review individual collection tasks. The register includes routine, repeat, and emergency examples, with status, priority, assigned staff, and due dates. A work order can reference a sampling plan and must identify its site. Staff use these records to organize the actual collection work.

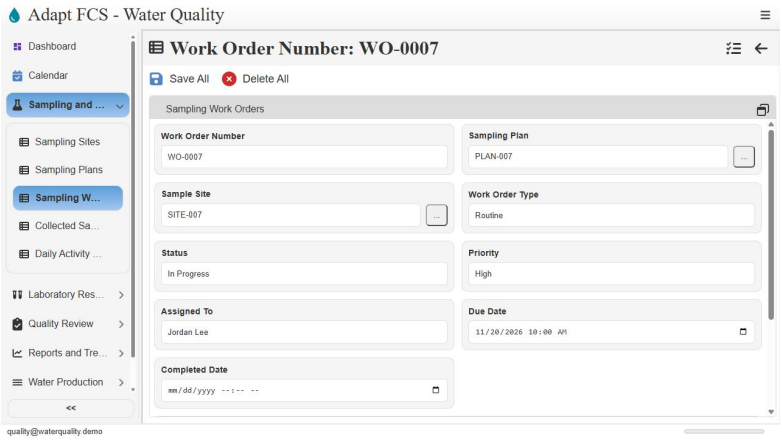
02:31 | Prepare a work order manually



Example draft only: linked plan and site, assignee, status, priority, and due date.

The Add form shows how staff prepare a work order manually. This example draft identifies plan zero zero seven and site zero zero seven, sets the work to Scheduled, records Jordan Lee as the assignee, and supplies a due date and instructions. We cancel this draft after capture. No unfinished example is left in the database.

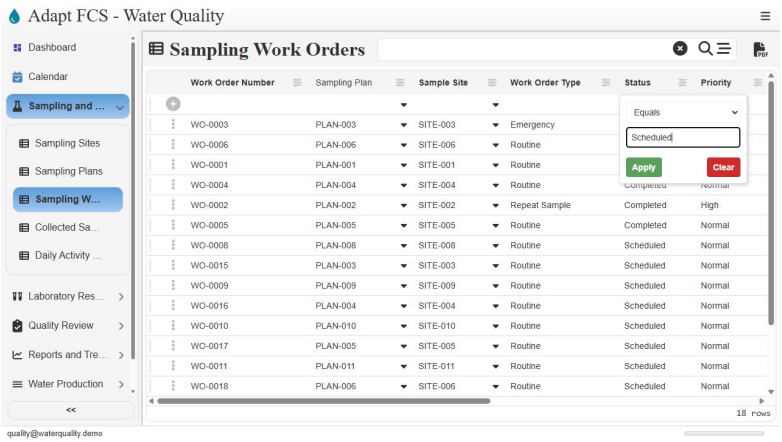
02:56 | Track ownership and progress



WO-0007 is an existing high-priority routine order marked In Progress.

Now inspect an existing work order for the same plan and site. Work order zero zero zero seven is marked In Progress, with high priority and Jordan Lee recorded as the assignee. Its due date and completion field sit together. Staff can review and maintain these details as the collection work progresses.

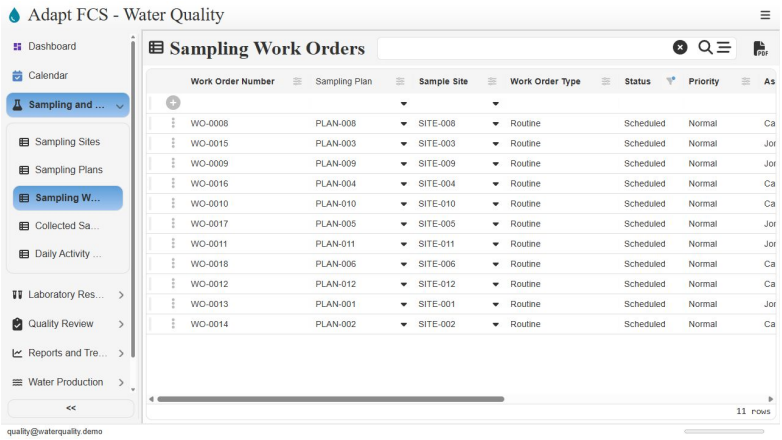
03:18 | Narrow the register by status



Open the Status column options, choose Set filter, then Equals and Scheduled.

Back in the work order register, open the Status column options and choose Set filter. Select Equals and enter Scheduled, then apply the filter. The same column controls provide a familiar way to narrow a busy register. Here, we are selecting which records to view rather than changing their status.

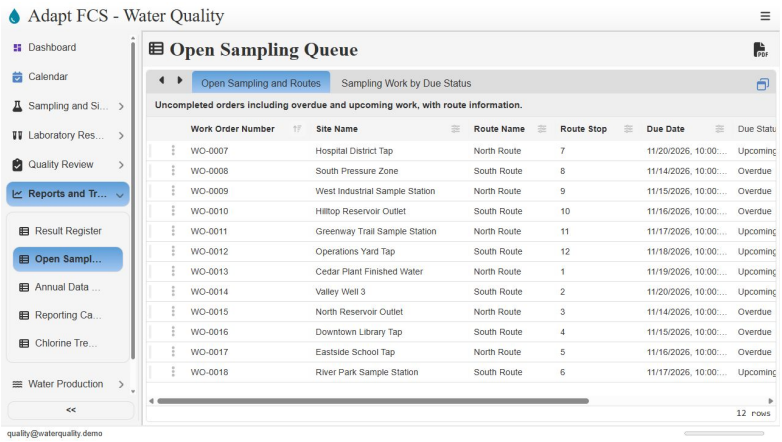
03:38 | Review the scheduled work



The filtered register shows the existing Scheduled work orders.

The register now shows the scheduled work orders. Staff can review their sites, priorities, assignments, and due dates without the completed examples filling the view. Clear the filter when you want the broader register again. Filtering supports daily review; it does not create new sampling work or send a reminder.

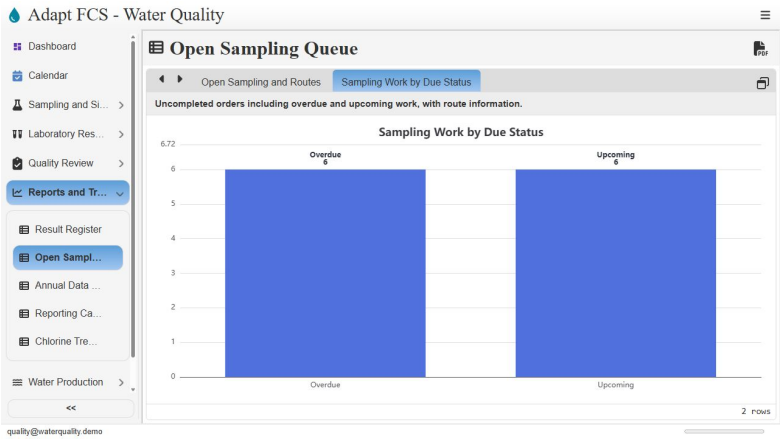
03:59 | Review open work by route



Reports and Trends > Open Sampling Queue

For a combined operational view, open Reports and Trends, then Open Sampling Queue. The report brings work order numbers together with site names, route names, route stops, and due dates. It focuses on uncompleted orders so staff can review the remaining collection work and organize a route using the recorded information.

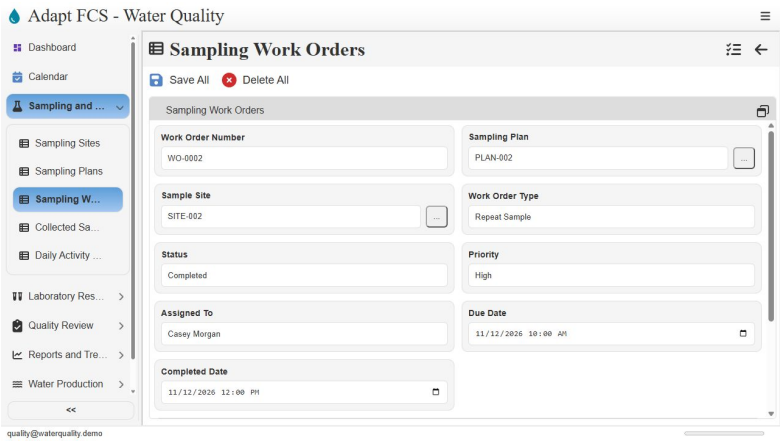
04:22 | Switch to the due-status chart



The chart tab summarizes the same open work by recorded due status.

Select Sampling Work by Due Status above the report to switch from rows to a chart. The refreshed demonstration shows overdue and upcoming work as separate groups. Use this summary to identify where a closer review is needed, then return to the report for the individual tasks. No notification delivery is being demonstrated.

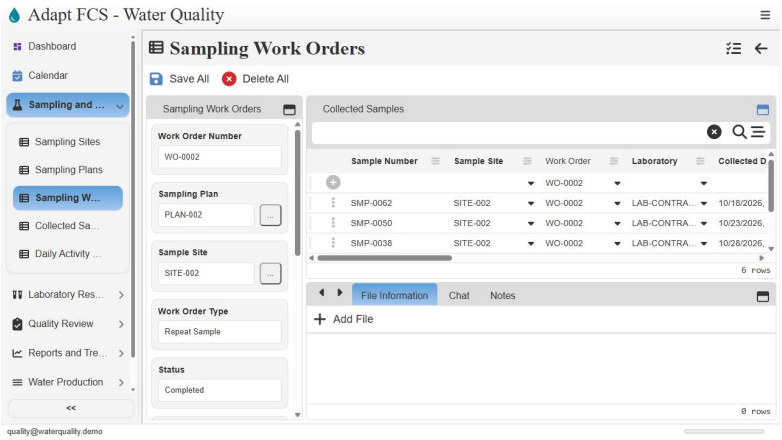
04:44 | Review a completed example



WO-0002 provides a separate completed repeat-sampling example.

To compare the progress states, here is a previously completed repeat sampling order. Work order zero zero zero two records its Completed status, assignee, due date, and completion date. Its instructions describe the earlier target-flag investigation. These are recorded workflow details, not an automatic certification that every sampling requirement was satisfied.

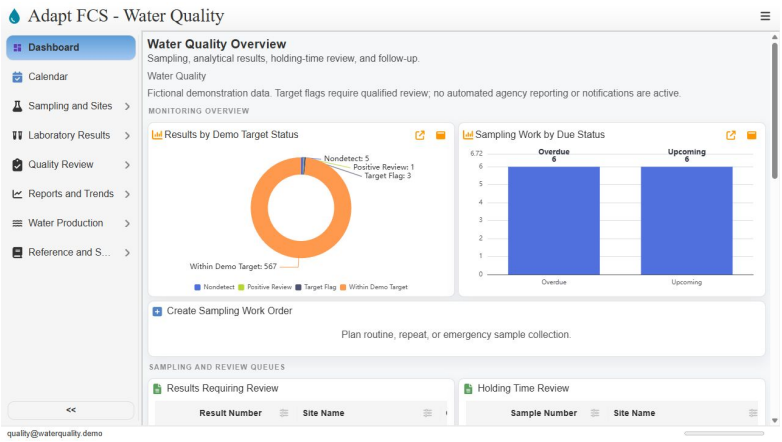
05:10 | Connect the work to collection history



Related collected samples connect the work order to its sampling history.

The record layout also shows collected samples related to the work order. Sample identifiers, site references, laboratory details, and collection information connect the planning record to collection history. Staff can open a related sample for closer inspection. That relationship helps keep the work order and its supporting records connected.

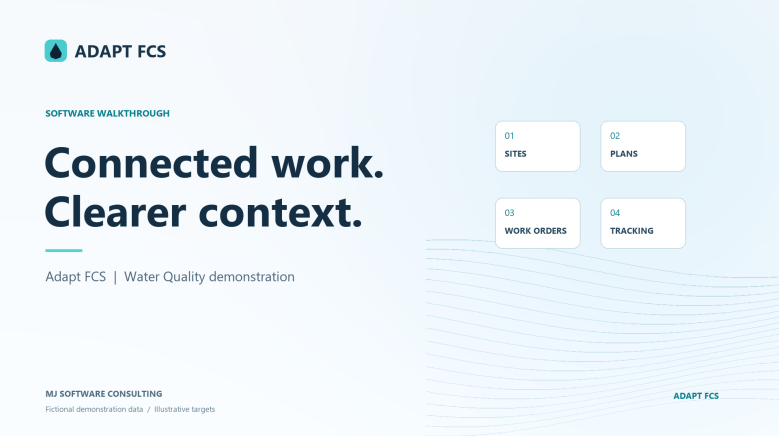
05:33 | A repeatable manual planning workflow



Identify the site > review the plan > prepare work > track progress > inspect collection history.

The workflow is straightforward: identify the site, review the plan, prepare a work order, assign the work, and use registers and reports to follow progress. The existing demo supports these manual steps. Automatic recurring work generation and sampling deadline reminders remain separate capabilities to configure or develop and verify for the intended deployment.

05:58 | Closing



Closing card.

Instrumental closing; no narration.