

**ERT**

**USER MANUAL**  
for

**SCRIBE CLP SAMPLING**

**V3.10**



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## INTRODUCTION

The intent of this User Guide is to provide a basic overview of how to use Scribe to create a new sampling project and manage samples collected for the EPA's Contract Lab Program (CLP). Scribe provides support for CLP sample documentation including the CLP Chain of Custody (COC) reports and the CLP XML file. This document also assumes that the user is already familiar with the Scribe application for sampling. Otherwise, please refer to the Scribe User guides for detailed Scribe application instructions.

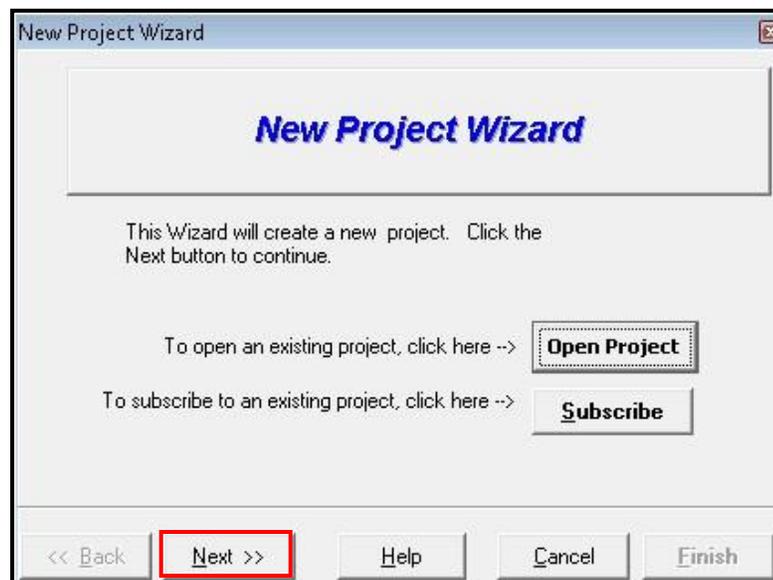
### Create a New Project

#### *New Project Wizard*

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If you are starting Scribe for the first time after installation, the New Project Wizard will run automatically. You can open the 'Scribe Example Project' with Demo data. Otherwise, to create a new project in Scribe:

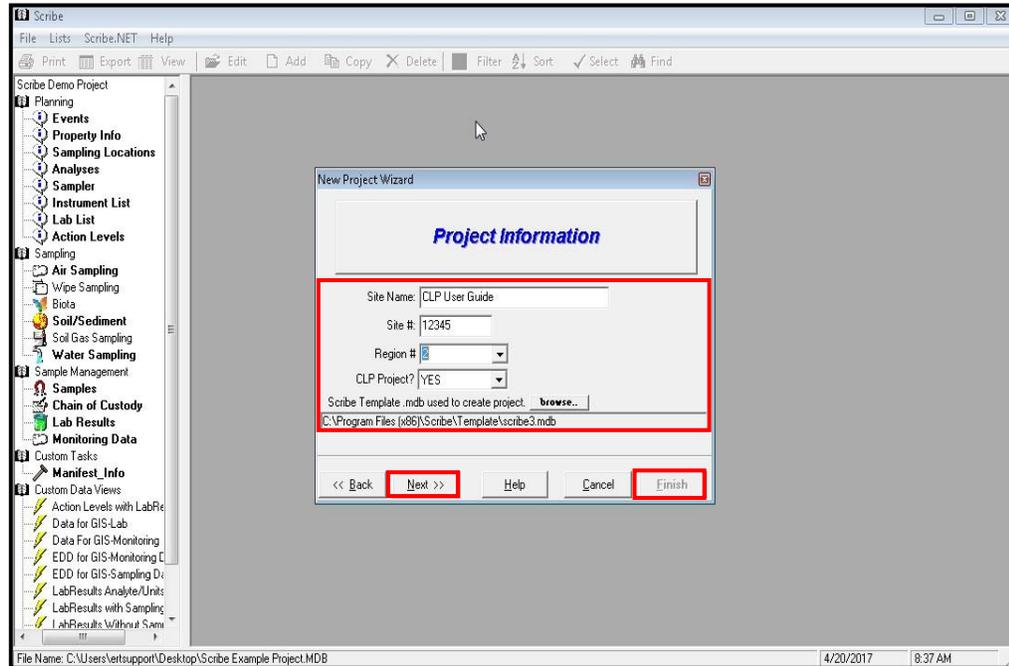
1. Click on 'File'.
2. Select 'New Project'.
3. A New Project Wizard window is displayed.



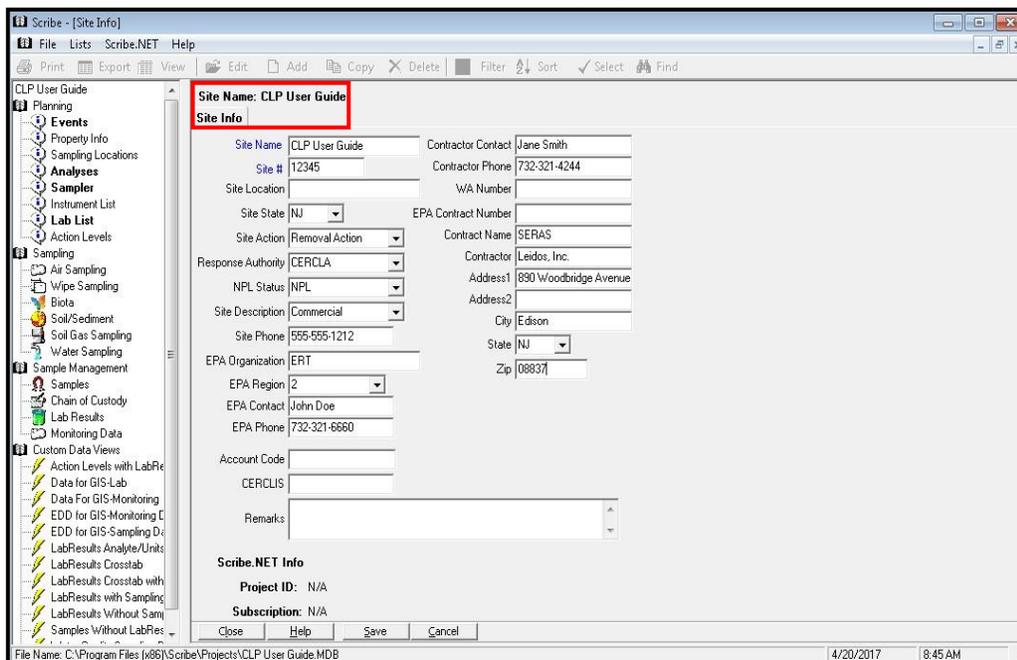
4. Click 'Next' to continue.



5. Enter the **Site Name**, **Site #** (Common ID for Project Data Management), **EPA Region #**, **CLP Project** (if YES, all layouts (grid and label) will default to CLP format), and the **Scribe Template** (default template is Scribe3.mdb). *NOTE: Users are advised to NOT include any site identifying information in the Site # field i.e. address, etc..*



6. Click 'Next' and then click 'Finish' to create the new project.



The New Project Wizard closes and the “**Site Info**” screen displays. ONLY the field names in **BLUE** are required, however it is recommended that you complete as many fields as possible.



# CLP SAMPLING IN SCRIBE

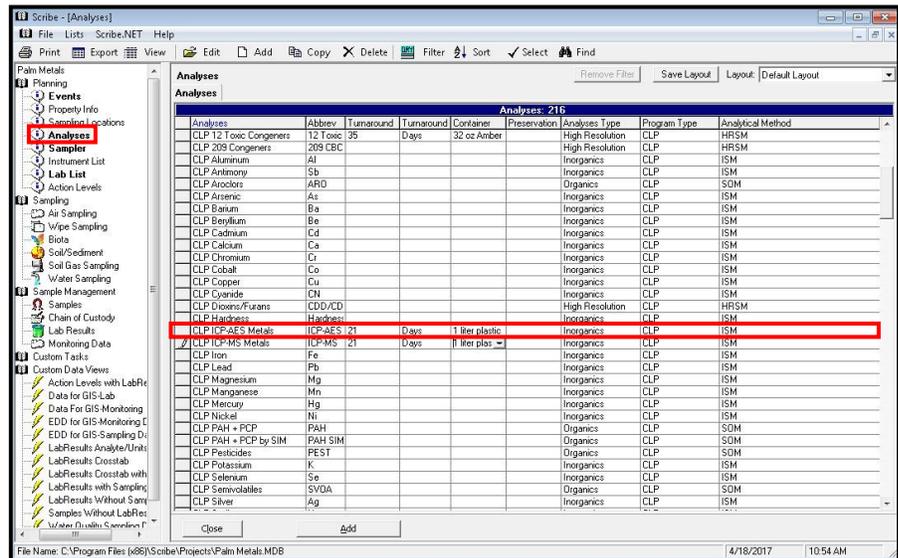
## CLP Samples

### CLP Analyses

The Scribe Analyses List includes default CLP Analyses. The analyses in this list are available to be assigned to a sample when sample details are entered. If only a few analyses will be needed for the sampling effort, removing the unwanted analyses will speed the selection process at the time sample information is entered. At a minimum, Turnaround Time, Container and Preservation should be populated for the required analyses so they populate when adding an analysis(es) to your sample(s) and will print on the Chain of Custody (COC). This list can be modified as needed to customize the pick list selections when entering Sample information. Below describes how to modify, add and delete the list of analyses for your specific sampling effort. **Note: Abbreviation and Turnaround Time are required for CLP Analyses and must appear on the Chain of Custody.**

To **MODIFY** an analysis(es):

1. Click on “**Analyses**” under Planning in the Navigation Pane.
2. Select the analysis and modify the name or enter Turnaround, Container, Preservation etc.

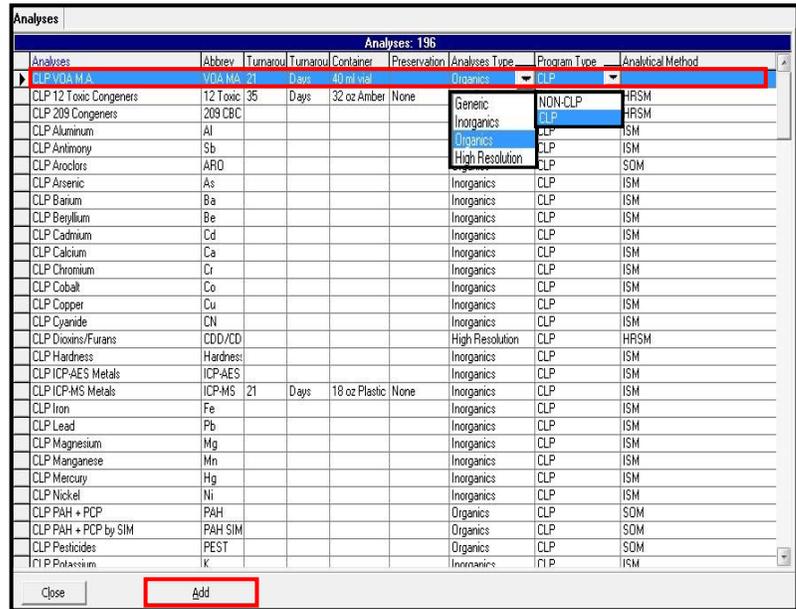


**NOTE:** If you add or modify a CLP Analysis, you **MUST** provide the analysis name, abbreviation, turnaround time, Analysis Type of either **Inorganic, Organic or High Resolution** and the **Program Type of CLP**, in order to correctly assign a CLP sample number and print the CLP Chain of Custody.



To **ADD** an analysis:

1. Click on **Add**.
2. Replace the #New01# with the new analysis name, and enter the Abbreviation, Turnaround, Container and Preservation. Select the Analysis Type and select the Program Type of CLP from the dropdown.

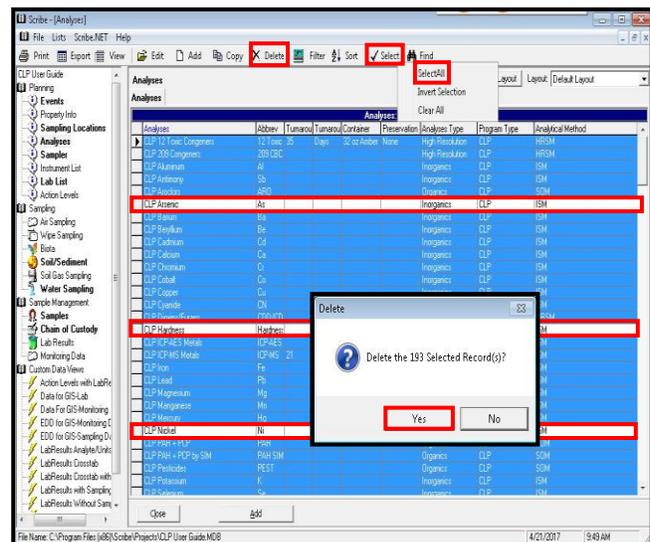


**NOTE:** If you add or modify a new CLP Analysis, you **MUST** provide the analysis name, abbreviation, turnaround time, and Analysis Type of either **Inorganic, Organic or High Resolution** and the **Program Type of CLP**, in order to correctly assign a CLP sample number and CLP Chain of Custody.

Also, when entering a modified analysis, please use the abbreviation **MA** when possible in the Analysis name and abbreviation (for example: “CLP VOA by MA 1301.0” – abbreviated as “VOA MA”

To **DELETE** an analysis(es):

1. Click the **‘Select’** button on the Toolbar and click **‘Select All’**.
2. De-select the analysis(es) by holding the Ctrl (control) key and clicking on each analysis.
3. Click the **‘Delete’** button.
4. Click **‘Yes’** when prompted to delete the selected records.



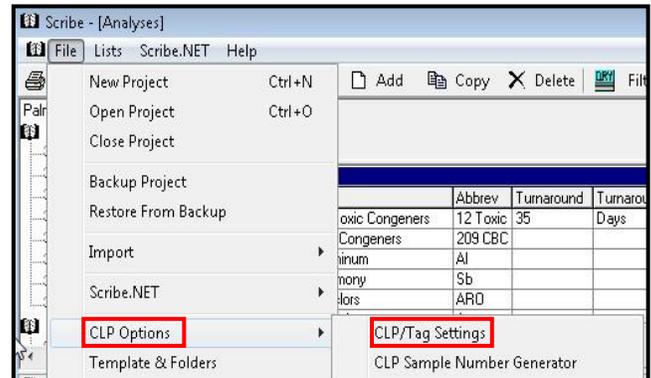


## CLP/Tag Settings

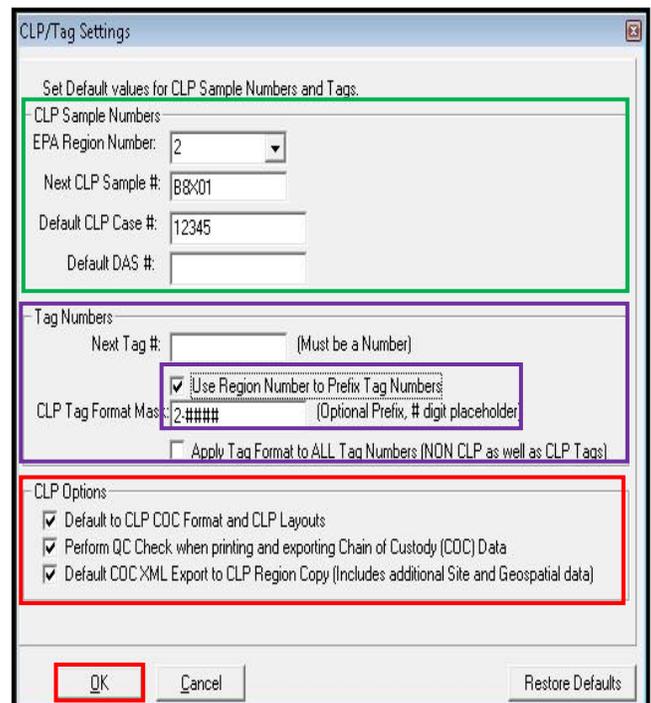
Scribe allows users to configure the starting CLP Sample numbers and numeric Tag numbers (if applicable). When a CLP Analysis is selected for a sample, Scribe will assign a CLP Sample number starting with the configured CLP Sample number. The numbers auto-increment as samples are added using the CLP business rules.

To configure the settings for CLP Sample Numbers and Tags:

1. Click on **File | CLP Options | CLP/Tag Settings**. The window for CLP/Tag Settings is displayed.



2. In the **CLP Sample Numbers** section, the Region Number will default to what you entered when you first created the project. Enter a starting CLP Sample #, a Case # and/or a DAS # as needed.
3. In the **Tag Numbers** section, enter the Next Tag # if you are assigning specific numeric tag numbers. If no specific Tag Number is required, Scribe will auto-generate the first **Tag Number** of 1000 and increment by 1.
4. If a checkmark is placed in the 'Use Region Number to Prefix Tag Numbers', the CLP Tag Format Mask will populate with Region # and four (4) # digit placeholders (2-####). The **Tag #** will print 2-1000, 2-1001, etc. If a checkmark is in Apply Tag Format to ALL Tag Numbers (NON CLP as well as CLP Tags), all analyses will follow that specified Tag Format.

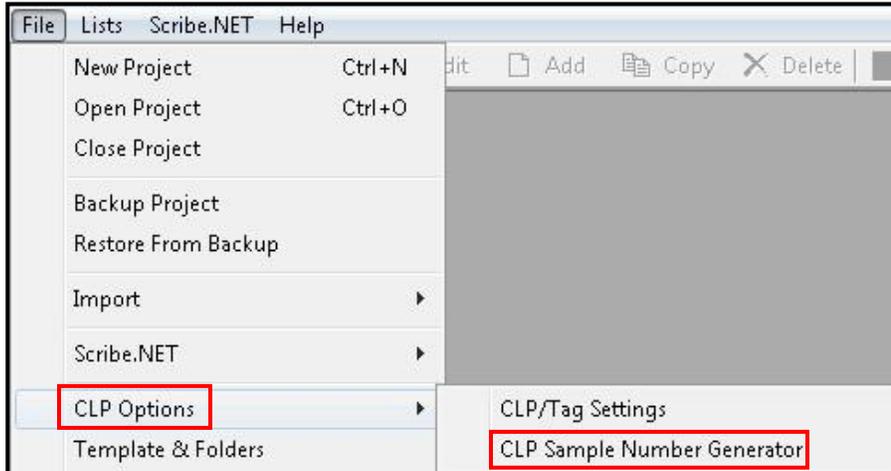


5. Under the **CLP Options**, Scribe performs a QC Check when printing and exporting Chain of Custody (COC) data. This check ensures that Turnaround Time (TAT), Turnaround Time Units, Analysis, Abbreviations, etc. are included on the COC and in the XML file. This feature is **ON** by default. In addition, Scribe will default to the CLP COC Format and CLP Layouts, as well as the COC XML Export to CLP Region Copy when YES is answered as a CLP Project at the Project Information screen. Click **OK** to Save and Close.

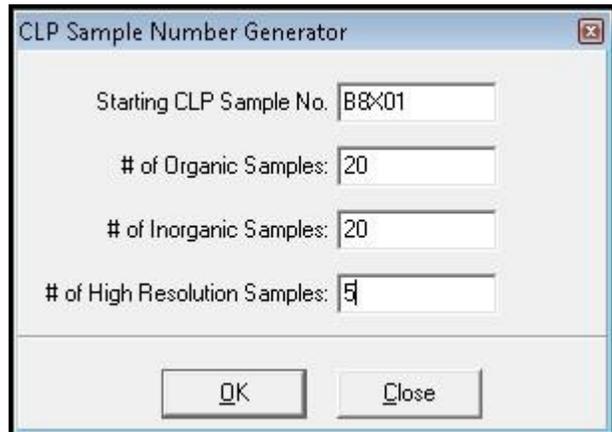


## CLP Sample Number Generator

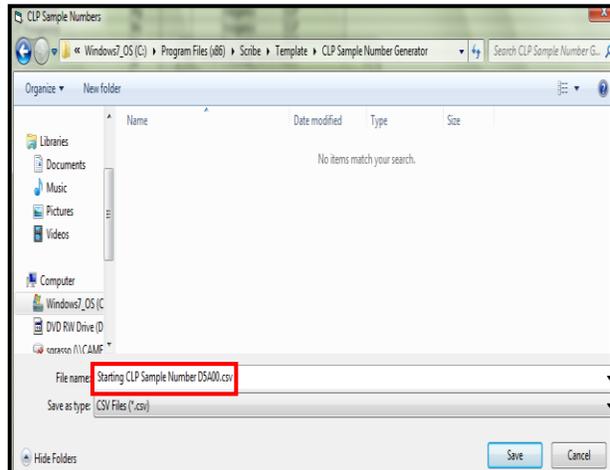
Also included with the CLP Options, is the ability to generate a list of CLP Sample Numbers that follow the CLP business rules. This list can be exported to a spreadsheet. Follow the steps below to build and export a list of CLP Sample Numbers.



1. Click on **File | CLP Options | CLP Sample Number Generator**.
2. Enter the Starting CLP Sample No., # of Organic Samples, # of Inorganic Samples, # of High Resolution Samples.
3. Click **OK**.
4. A dialog box will open asking for a file name. By default, Scribe saves the file as a .csv (comma separated file) that can be opened up in MS Excel.
5. Click **Save**.



CLP Sample No
PB8X01
PB8X02
PB8X03
MB8X01
MB8X02
MB8X03
B8X01
B8X02
B8X03

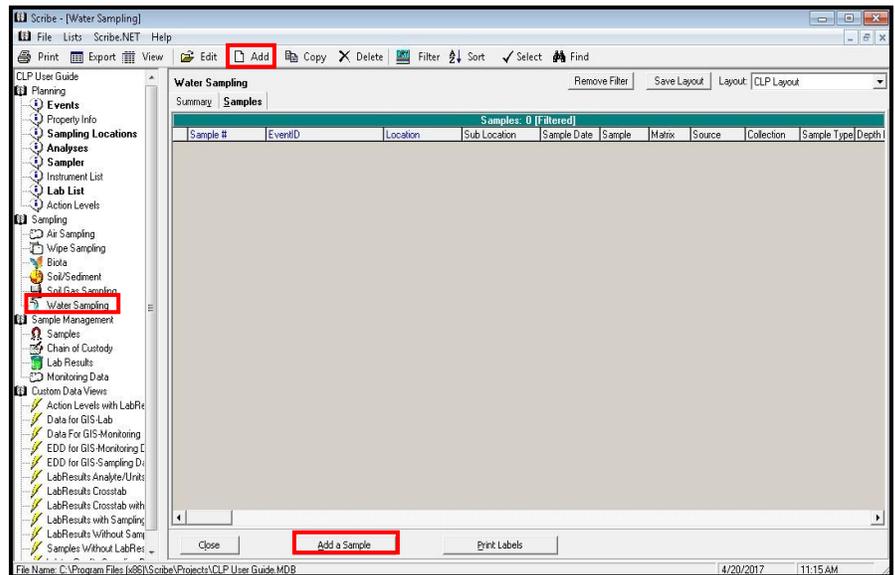




## Adding CLP Samples

Depending on the type of sampling you will be performing, click on the appropriate sampling task under Sampling in the Navigation Pane. For example:

1. Click on 'Water Sampling'.
2. Click the 'Add' button on the top menu or the 'Add a Sample' button on the bottom.



3. Enter sample information into the "Sample Details" screen.

**Water Sampling: Sample # 12345-0001**

**Sample Details** | Water Quality | Measurements | Analysis

EventID: 2nd QTR GWM Apr 2017 | Date Collected: 04/20/2017  
Sample #: 12345-0001 | Time Collected: 08:00 (hh:mm)  
Location: A001 | Sampler: SERAS  
Sub Location: | Activity: |

Matrix: Ground Water | Source: Monitoring Well | Collection: Discrete Interval | Sample Type: Field Sample  
Concentration: | Sampling Depth: Depth From: | Depth To: | Depth Units: |  
Odor: | Color: |

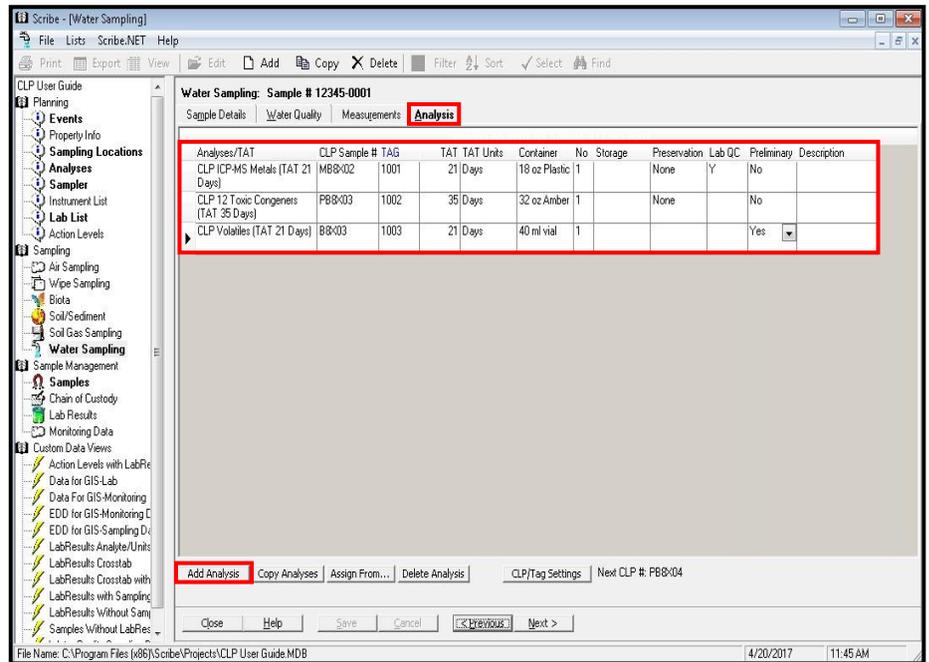
Remarks: |

**Note:** The Water Sampling task contains a Water Quality and Measurements tab. The tabs will vary by Sampling Task.



## Assigning Analyses

1. Select the **Analysis** tab.
2. Click in the **Analyses/TAT** field.
3. Click the **down arrow** for the list of CLP Analyses.
4. Select the analysis to be performed on this sample.
5. Click in the CLP Sample # field to display the CLP Sample # and Tag number based on the CLP/Tag Settings.
6. To assign additional Analyses, click '**Add Analysis**'.



7. When all analyses have been added, click the '**Close**' button on the bottom of the window to save and close.

**NOTE:** CLP Volatile analysis for Soil/Sediment samples may require sample weights to be recorded. Right-click in the Analyses grid and pick "Select Columns" to include the sample weight columns. Otherwise, this information can be recorded in the COC section by selecting the "Sample Weight Layout".



# LABELS AND CHAIN OF CUSTODY

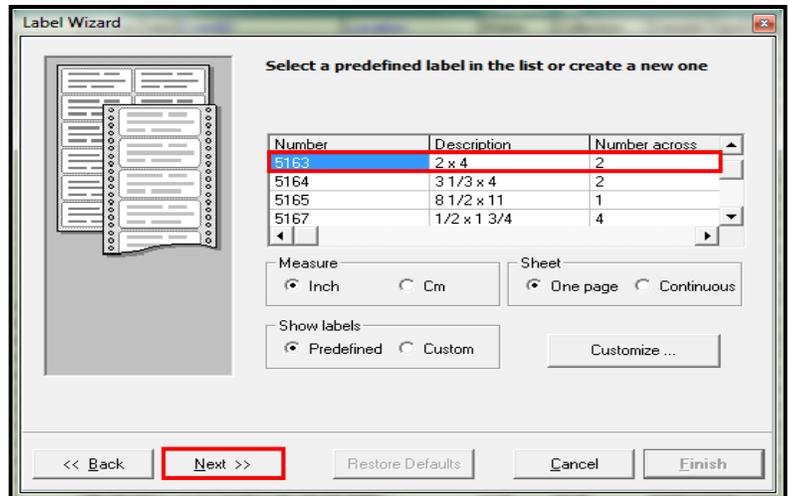
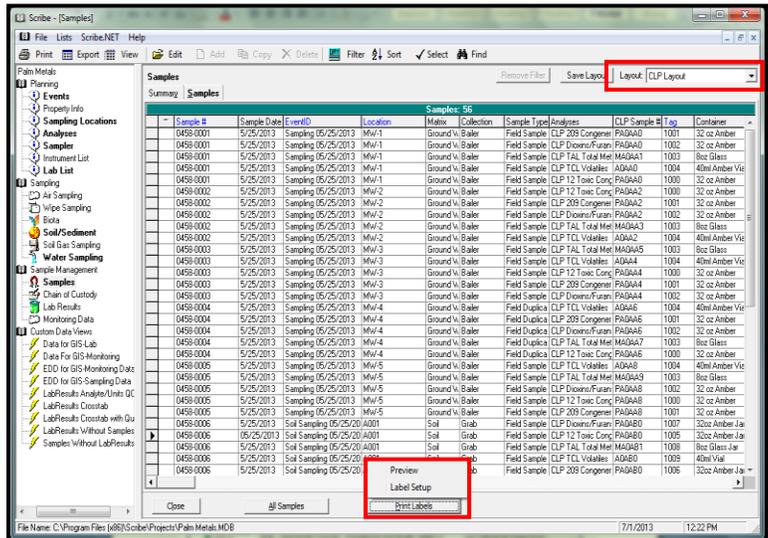
## CLP Sample Labels

### Print Sample Labels

Sample Label options are available on the individual Sampling Task view (e.g. Soil/Sediment, Water, etc) or in the Samples section under Sample Management in the Navigation Pane. All samples shown on the screen are available to be printed on labels. You can apply Filters, Finds and Sorts to limit which labels will print. Before printing labels, make sure the CLP Layout is loaded (upper right corner of the screen).

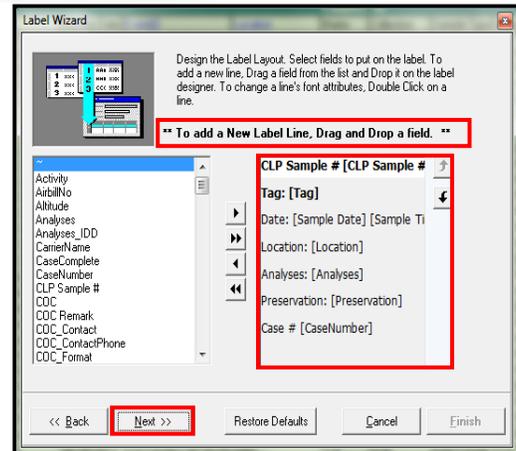
To configure your labels and print:

1. Click on the 'Print Labels' button on the bottom.
2. Select 'Label Setup'.
3. Select a pre-defined label format that matches your labels or create a customized label.
4. Click **Next**.

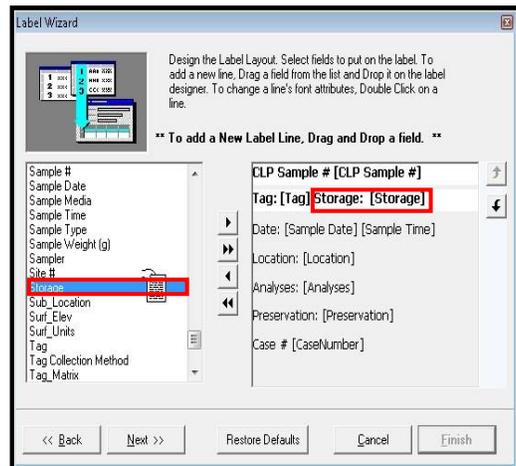




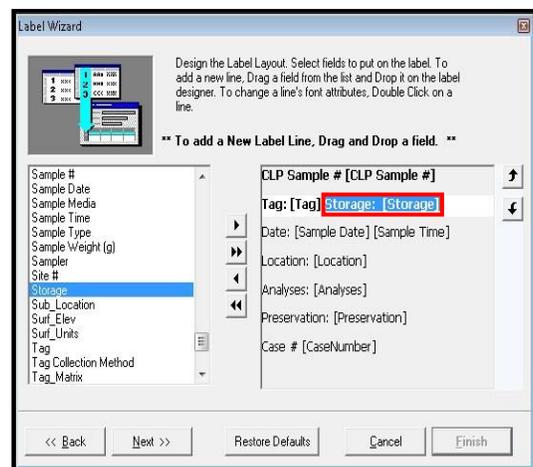
5. Use the default CLP label design or design your label by adding/removing label lines.



6. To Add a new Label Line, select the field (on the left), hold the mouse down, and drag and drop the field onto the label. Enter a caption name (e.g. Storage).

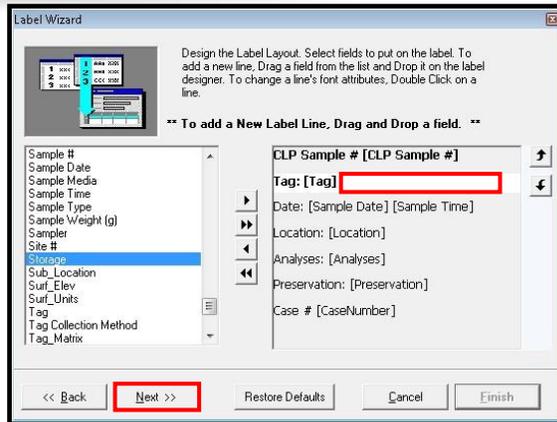


7. To Remove a Label Line, highlight the field (on the right), and click the delete key.

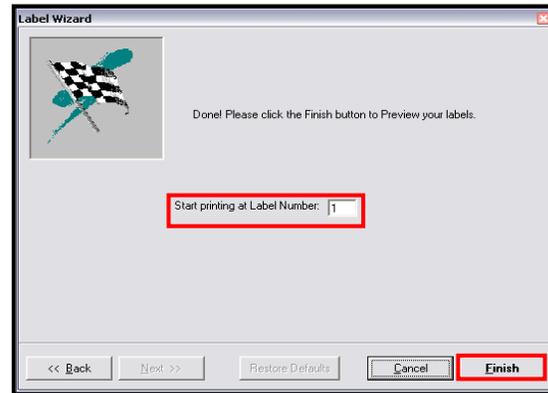




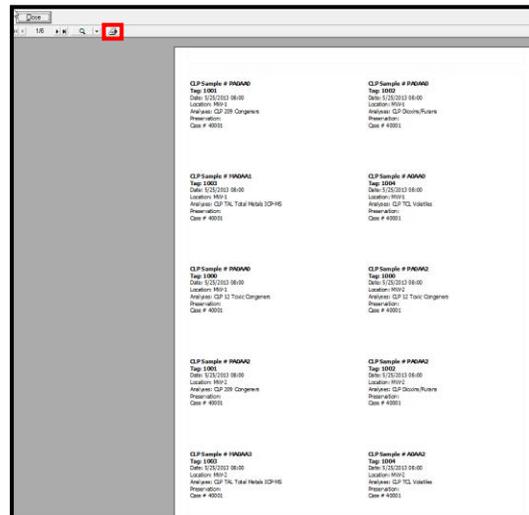
8. When the Label Layout is complete, click **Next**.



9. Click **Finish**. (If you need to print on half a sheet of labels, use this option to select which label to print on first).



10. A preview of the labels to be printed is displayed.



11. To print, click the Printer icon.



## CLP Chain of Custody

When creating a CLP Chain of Custody (COC) in Scribe, multiple analysis types can be added to the same COC. For example, Inorganic, Organic, High Resolution and non-CLP analysis can all be placed on the same chain by selecting the “CLP Generic COC” format when creating a new COC or by removing the filter when on the Samples Tab of the COC section. As a convenience, Scribe contains functionality to group analyses by type when creating a COC. By selecting one of the CLP types (Organic, Inorganic, High Resolution) from the COC Format list, Scribe will filter the Samples for that specific analysis type. Remember, if multiple analysis types need to be added to the same COC, simply remove the filter and a complete list of analysis(es) will be available.

**Note:** After submitting samples to the CLP labs, it is recommended that users request the labs to return lab results in electronic format i.e. a spreadsheet (.xls) or a comma-separated text (.csv). Scribe has a Custom Import feature that will import lab result data and marry them up with your sampling data already in Scribe. This effectively eliminates transcription errors and reduces data processing time. See the “Scribe Manual Advanced Part III” for importing details.

### Create COC and Assign Samples

To manage and print a Chain of Custody (COC), a COC needs to be created and then samples have to be assigned to the COC:

1. Select ‘Chain of Custody’ under Sample Management in the Navigation Pane.
2. Click the ‘Add a Chain of Custody’ button on the bottom of the window.





3. The “COC Details” screen is displayed. By default, Scribe assigns a unique generic COC # across projects. The COC number auto-increments based on the COC ID# Mask. The COC number and mask can be changed at any time.

4. Complete the form selecting the Lab and entering other fields such as the Cooler #, COC Format, Date Shipped and any Special Instructions.

5. Select the correct **COC Format** based on the type of Samples you are packing. All CLP COCs are identical, however, selecting a COC Format is a convenience option that filters the samples based on the format selected (i.e., Inorganic Format will filter for Inorganic Analyses). However, if a COC needs to contain multiple Analyses types, (Organics and Inorganics) Select the CLP Generic and all samples will be available to be placed on the COC.

6. Click ‘**Assign Samples to the COC**’ to continue.

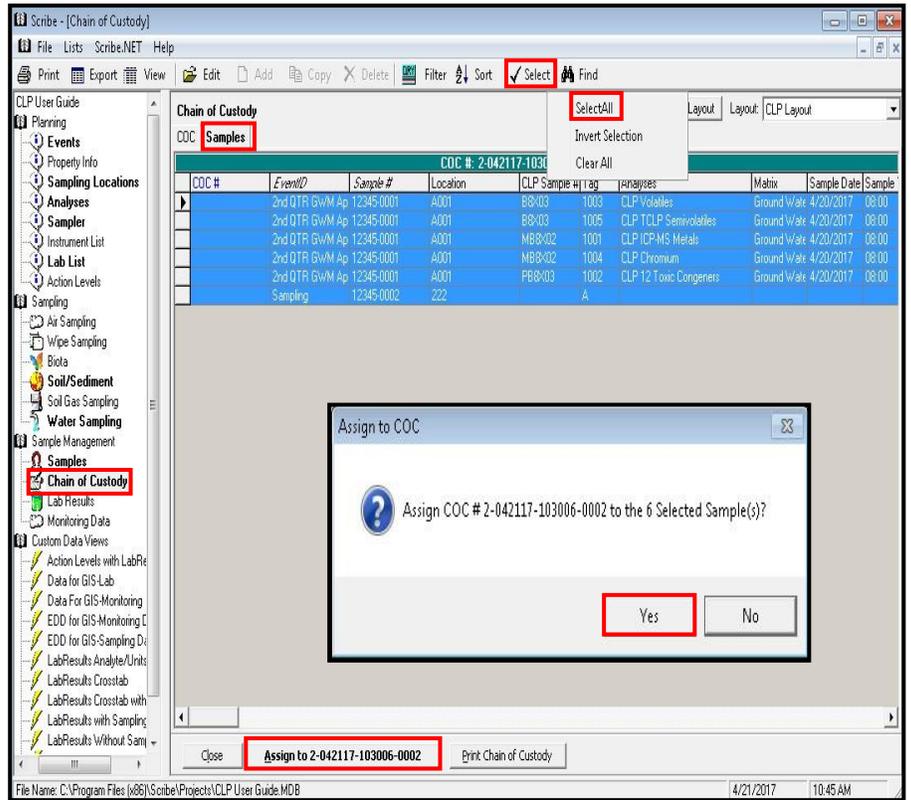


7. The 'Chain of Custody Samples' tab is displayed and lists samples that have not yet been assigned to a COC.

8. Select the samples to assign to the Chain of Custody by using the Select Button on the toolbar or by holding down the Shift key or Ctrl key while clicking on the first column before COC# of the samples you wish to assign to the COC.

9. Click 'Assign to' button on the bottom of the window to assign the samples to the Chain of Custody.

10. Click 'Yes' to assign the selected samples to the COC.



11. The selected samples are assigned to the COC.

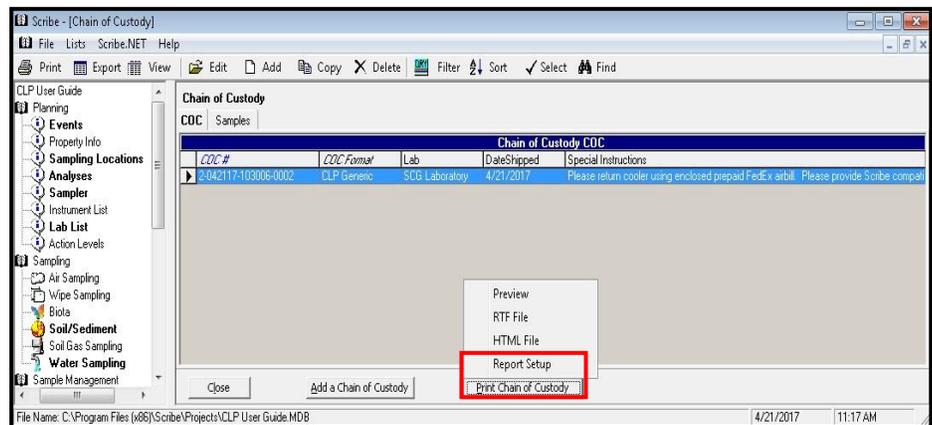
Chain of Custody										
Remove Filter Save Layout Layout: CLP Layout										
COC Samples										
COC #: 2-042117-103006-0002 [Filtered]										
COC #	EventID	Sample #	Location	CLP Sample #	Tag	Analyses	Matrix	Sample Date	Sample	
2-042117-103006-0	2nd QTR GwM Ap	12345-0001	A001	B8X03	1003	CLP Volatiles	Ground Water	4/20/2017	08:00	
2-042117-103006-0	2nd QTR GwM Ap	12345-0001	A001	B8X03	1005	CLP TCLP Semivolatiles	Ground Water	4/20/2017	08:00	
2-042117-103006-0	2nd QTR GwM Ap	12345-0001	A001	MB8X02	1001	CLP ICP-MS Metals	Ground Water	4/20/2017	08:00	
2-042117-103006-0	2nd QTR GwM Ap	12345-0001	A001	MB8X02	1004	CLP Chromium	Ground Water	4/20/2017	08:00	
2-042117-103006-0	2nd QTR GwM Ap	12345-0001	A001	PB8X03	1002	CLP 12 Toxic Congeners	Ground Water	4/20/2017	08:00	
2-042117-103006-0	Sampling	12345-0002	222		A					



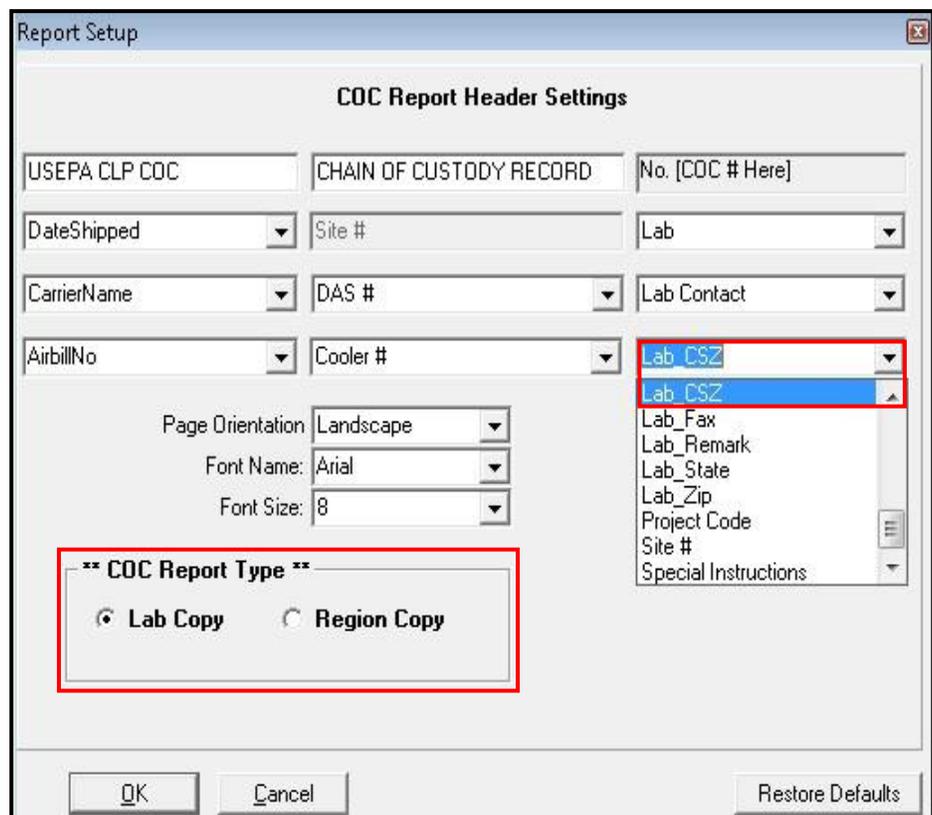
## Configure and Print COC

To configure and print a COC:

1. Click 'Print Chain of Custody' button on the bottom of the Chain of Custody window.
2. Select 'Report Setup'.



3. The COC Report Header Settings are displayed. The Report Header can be customized by clicking on the down arrows and selecting different Report Header criteria (i.e., Lab\_CSZ – City/State/Zip)
4. The COC Report Type (Lab or Region Copy) can also be selected. **Note:** The Lab Copy does not include any Site or Project names, as well as Sample Type.





5. Click 'OK' to preview and click on the Printer icon on the top to print the Chain of Custody.

Page 1 of 1  
USEPA CLP COC **LAB COPY** CHAIN OF CUSTODY RECORD No: 2.042117-103006-0002  
Date Shipped: 4/21/2017 Case#: 12346 Lab: SCG Laboratory  
Carrier Name: FedEx Cooler #: 1 Lab Contact: Samantha Dougherty  
Airbill No: ABI389F089 Edison, NJ 08837

Sample Identifier	CLP Sample No.	Matrix/Sampler	Coll. Method	Analysis Turnaround (Days)	Tag/Preservative/Bottles	Location	Collection Date/Time	For Lab Use Only
12345-0001	B8/X03	Ground Water/ SERAS	Discrete Interval	VOA(21)PR, TCLP SVDA(15)	1003, 1005 (2)	A001	04/20/2017 08:00	
12345-0001	M88/X02	Ground Water/ SERAS	Discrete Interval	ICP-MS(21), Cr(21)	1001 (None), 1004 (2)	A001	04/20/2017 08:00	
12345-0001	P88/X03	Ground Water/ SERAS	Discrete Interval	12 Toxic CBCs(35)	1002 (None) (1)	A001	04/20/2017 08:00	

Sample(s) to be used for Lab QC: 12345-0001 Tag 1001 - Special Instructions: Please return cooler using enclosed prepaid FedEx airbill. Please provide Scribe compatible Lab Result ED 0 Shipment for Case Complete? N  
Samples Transferred From Chain of Custody #

Analysis Key: VOA=CLP Volatiles, TCLP SVDA=CLP TCLP Semivolatiles, ICP-MS=CLP ICP-MS Metals, Cr=CLP Chromium, 12 Toxic CBCs=CLP 12 Toxic Congeners

Items/Reason	Relinquished by (Signature and Organization)	Date/Time	Received by (Signature and Organization)	Date/Time	Sample Condition Upon Receipt

CLP Generic Lab Copy

Page 1 of 1  
USEPA CLP COC **REGION COPY** CHAIN OF CUSTODY RECORD No: 2.042117-103006-0002  
Date Shipped: 4/21/2017 Case#: 12346 Lab: SCG Laboratory  
Carrier Name: FedEx Cooler #: 1 Lab Contact: Samantha Dougherty  
Airbill No: ABI389F089 Edison, NJ 08837

Sample Identifier	CLP Sample No.	Matrix/Sampler	Coll. Method	Analysis Turnaround (Days)	Tag/Preservative/Bottles	Location	Collection Date/Time	Sample Type
12345-0001	B8/X03	Ground Water/ SERAS	Discrete Interval	VOA(21)PR, TCLP SVDA(15)	1003, 1005 (2)	A001	04/20/2017 08:00	Field Sample
12345-0001	M88/X02	Ground Water/ SERAS	Discrete Interval	ICP-MS(21), Cr(21)	1001 (None), 1004 (2)	A001	04/20/2017 08:00	Field Sample
12345-0001	P88/X03	Ground Water/ SERAS	Discrete Interval	12 Toxic CBCs(35)	1002 (None) (1)	A001	04/20/2017 08:00	Field Sample

Sample(s) to be used for Lab QC: 12345-0001 Tag 1001 - Special Instructions: Please return cooler using enclosed prepaid FedEx airbill. Please provide Scribe compatible Lab Result ED 0 Shipment for Case Complete? N  
Samples Transferred From Chain of Custody #

Analysis Key: VOA=CLP Volatiles, TCLP SVDA=CLP TCLP Semivolatiles, ICP-MS=CLP ICP-MS Metals, Cr=CLP Chromium, 12 Toxic CBCs=CLP 12 Toxic Congeners

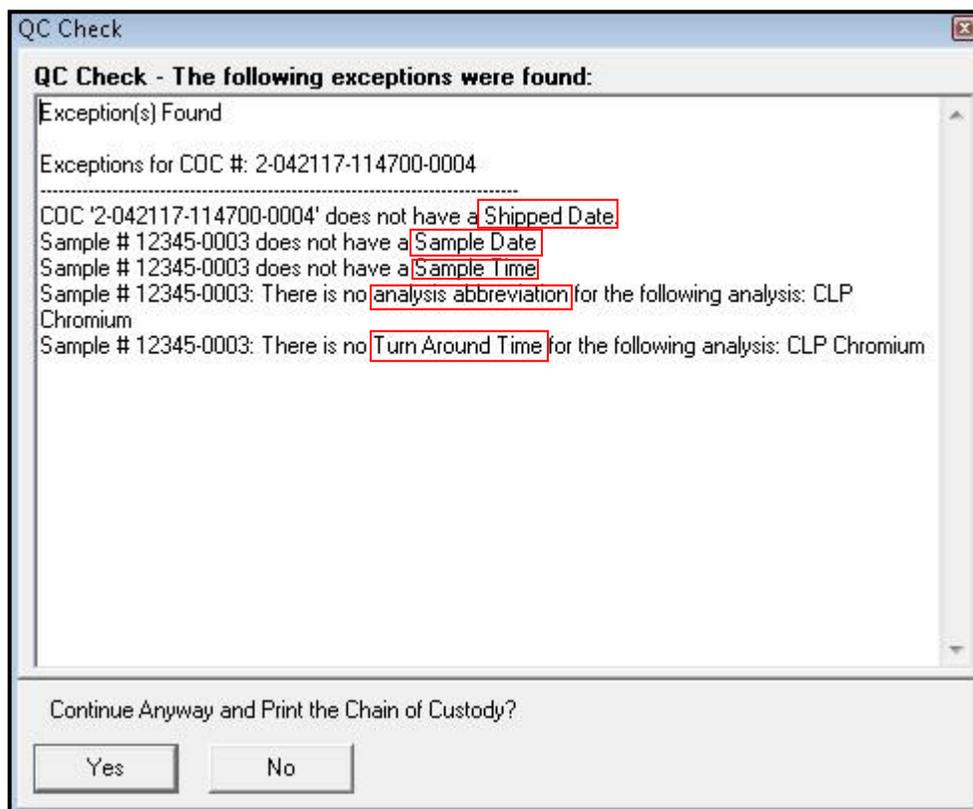
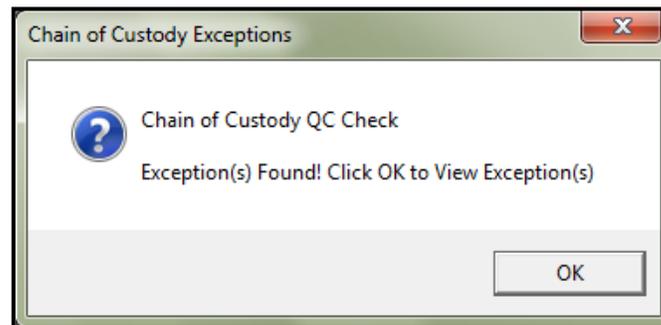
Items/Reason	Relinquished by (Signature and Organization)	Date/Time	Received by (Signature and Organization)	Date/Time	Sample Condition Upon Receipt

CLP Generic Region Copy



## COC QC Check

Scribe performs a QC Check for the COC hardcopy and .XML export. The QC check will generate a Chain of Custody Exceptions notification and a log indicating what information is missing from which samples. Examples of missing information are shown below. Users should correct the missing information prior to continuing with the COC. *Note: Users can continue and print the COC; however, the .XML may be rejected by the Sample Management Office (SMO). All information identified in the QC Check that is not resolved prior to providing the COC to the laboratory, will most likely result in a discrepancy and potential delay in the laboratory being able to log and process the samples.*



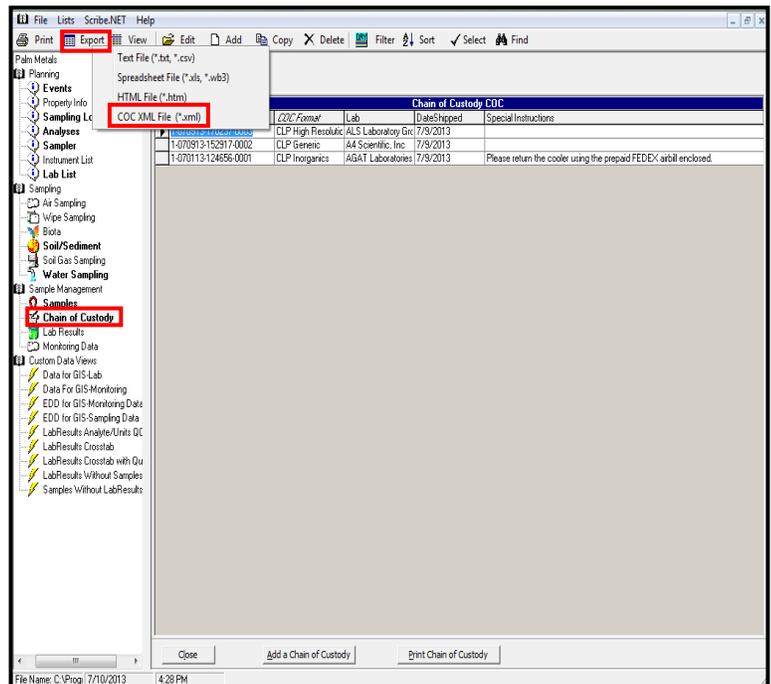


## Export to XML File

### Export COC to XML

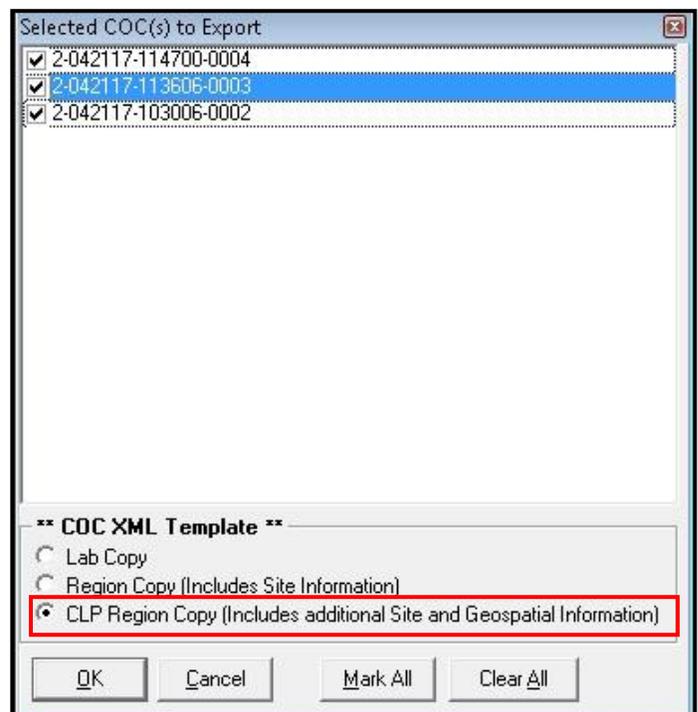
To export the COC to an XML file:

1. Click on **Chain of Custody** under Sample Management in the left Navigation bar.
2. Click the 'Export' button on the menu bar.
3. Select 'COC XML File (\*.xml)' option.



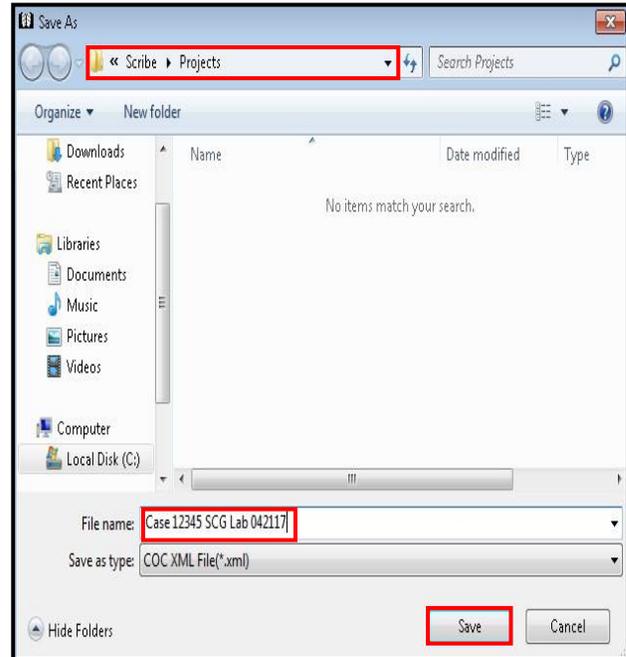
4. Select the Chain(s) of Custody records to export by checking the individual records or click the 'Mark All' button to select all COCs.

**Note:** By default, the CLP Region Copy is selected. This format should be used for uploading to the SMO portal. If the .xml is uploaded into something other than the SMO portal and is rejected, try the Lab Copy (Legacy .XML) or the Region Copy instead.

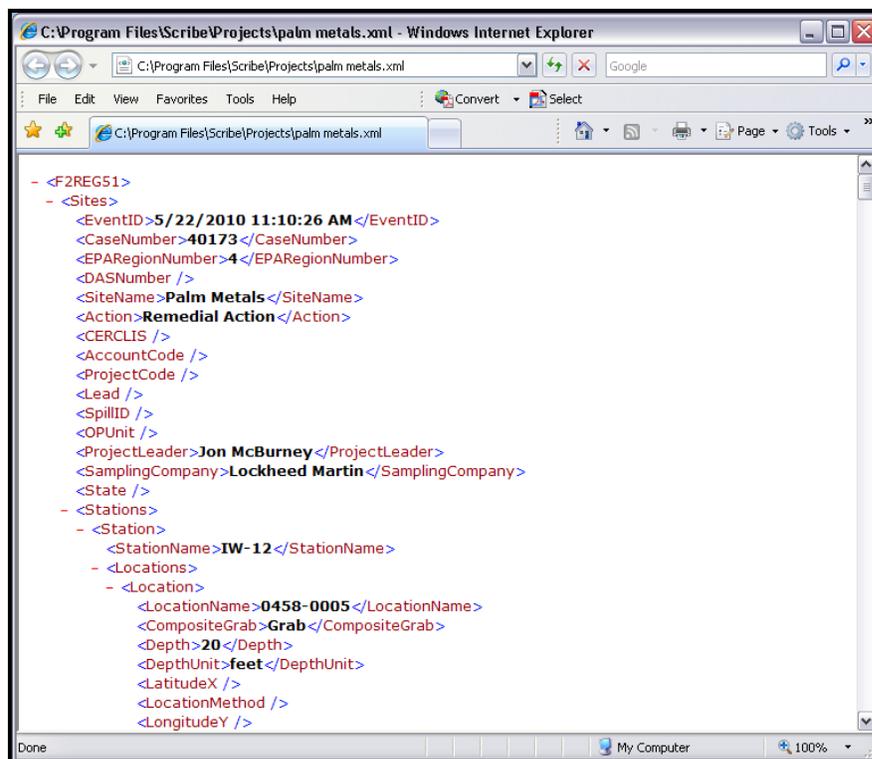




5. Select your file location and provide a filename and click **'Save'**.



6. The .XML file may open in Windows Internet Explorer while the file is created and saved.





## Sample Weight Log

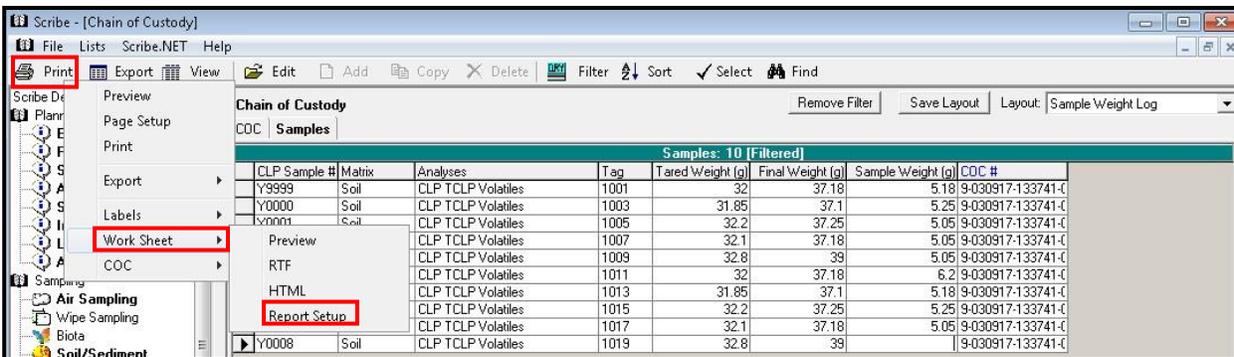
Worksheet reports are also useful for creating the Sample Weight Log. After assigning the samples to a chain of custody, switch to the Sample Weight Log layout and follow the instructions above to select samples, configure the report header and generate the worksheet report. In addition, after displaying the samples with weight information, you can export the list to Microsoft Excel and configure a custom header outside of Scribe using MS Excel.

1. In the Chain of Custody section, switch to the Sample Weight Log layout.

CLP Sample #	Matrix	Analyses	Tag	Tared Weight (g)	Final Weight (g)	Sample Weight (g)	COC #
Y9999	Soil	CLP TCLP Volatiles	1001	32	37.18	5.18	9-030917-133741-C
Y0000	Soil	CLP TCLP Volatiles	1003	31.85	37.1	5.25	9-030917-133741-C
Y0001	Soil	CLP TCLP Volatiles	1005	32.2	37.25	5.05	9-030917-133741-C
Y0002	Soil	CLP TCLP Volatiles	1007	32.1	37.18	5.05	9-030917-133741-C
Y0003	Soil	CLP TCLP Volatiles	1009	32.8	39	5.05	9-030917-133741-C
Y0004	Soil	CLP TCLP Volatiles	1011	32	37.18	6.2	9-030917-133741-C
Y0005	Soil	CLP TCLP Volatiles	1013	31.85	37.1	5.18	9-030917-133741-C
Y0006	Soil	CLP TCLP Volatiles	1015	32.2	37.25	5.25	9-030917-133741-C
Y0007	Soil	CLP TCLP Volatiles	1017	32.1	37.18	5.05	9-030917-133741-C
Y0008	Soil	CLP TCLP Volatiles	1019	32.8	39	6.2	9-030917-133741-C

2. Enter the Tared, Final and Sample Weight.

3. Click on the 'Print' | Work Sheet | Report Setup.





- Configure the Report Header fields to reflect the information that will be displayed at the top of the report.

- Click 'OK' and the Sample Weight Log report is generated.

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**Sample Weight Log**  
**Chain of Custody - Additional Info -**

Shipped to: XYZ CLP Lab  
112 Main Street  
Anytown, NJ 00000

Completed By: \_\_\_\_\_  
Date: \_\_\_\_\_

Case Number: 10001  
DAS Number: 123456  
Date Shipped: \_\_\_\_\_

CLP Sample #	A0AB0	A0AB2	A0AB4	A0AB6	A0AC4
Matrix	Soil	Soil	Soil	Soil	Soil
Analyses	CLP TCL Volatiles				
Preservative					
Tag	1009	1009	1009	1009	1009
Tared Weight (g)	32	31.85	32.2	32.1	32.8
Final Weight (g)	37.18	37.1	37.25	37.18	39
Sample Weight (g)	5.18	5.25	5.05	5.05	6.2
COC #	1-071113-163043-0004	1-071113-163043-0004	1-071113-163043-0004	1-071113-163043-0004	1-071113-163043-0004