KB00157 - How to change the name of a ProjectID

SCENARIO:

It is desired to change the name of a specific ProjectID so it shows the correct name in the dropdown for selecting a ProjectID in the Sample Login function.

SOLUTION:

Change ProjectID at Sample Login

If the Order has not been signed off, then changing the ProjectID is allowed via the form. There will be a popup box, clicking Yes will update the ProjectID and the samples and test. Clicking No will update the ProjectID and not the samples and tests.

If the Order has been signed off, the form does not allow a change to the ProjectID.

Change ProjectID in Customers Form

A ProjectID in the Customers form cannot be changed if it has any information linked to it. A ProjectID can be marked as not active (the checkbox is on the far right in the datagrid (Customers form with the Projects tab selected). When a project is marked not active, it is not in the list of ProjectID values that can be selected in the Sample Login function.

The preferred method is to mark a ProjectID as not active and create a new Project. Many datagrids can easily be copied and pasted to the new ProjectID from the old ProjectID.

Copy and Pasting datagrids is accomplished by:

1. Select the old ProjectID
2. Click the little top left gray square that selects the whole datagrid
3. Press Ctrl-C to copy
4. Select the new ProjectID

5. Click the gray square with the asterisk on it
6. Press Ctrl-V to paste

Please note that Projects are linked in many forms in Sample Master®, below is a list:

- Customers: Projects
- Customers: Project Sampling
- Customers: Project Pricing
- Customers: Project Parameters
- Customers: Project QC Types
- Customers: RDLs
- Customers: Reports
- Customers Ribbon: Site Params
- Schedule Projects
- Reschedule Holidays
- Sample Login
- Quotes

Applies To:

- Sample Master® v8.5 or higher

FOR MORE INFO

Contact ATL Support:

- Call: 1-800-565-LIMS (5467)
- Email: support@atlab.com
- Monday thru Friday 8 am – 5 pm ET

Accelerated Technology Laboratories Inc.

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496 Holly Grove School Rd	toll-free: 800.565.LIMS (5467)	www.atlab.com
West End, NC 27376	phone: 910.673.8165	info@atlab.com
	fax: 910.673.8166	