

AASHTOWare Project Construction and Materials™ Quick Reference Guide for TDOT Managing Contract Materials and Acceptance Actions

Background:

- An acceptance action establishes what samples, tests, or field inspections are required for the acceptance and approval of a contract material.
- An acceptance action may include multiple options, each of which represents one way to achieve acceptance.
- Each option, in turn, includes one or more rate/frequencies, which define the conditions that must be met.
- A material set is a group of materials associated with a reference item. When materials and acceptance actions are generated on a contract, the system generates a list of materials needed for the contract items, along with all the acceptance actions for those materials.

Adding a Material Set to a Contract Project Item:

Navigation: Construction > Contract Administration > Contract Administration Summary > Items quick link > Contract Project Items tab

1. Locate the row for the contract project item.
2. Click the row **Actions** menu on the item row.
3. Select the **Create Material Set** task.
4. In the **Material Set** field, enter a name. *Hint: Perhaps use item code.*
5. Click the **Save** button.

Add Materials to a New Contract Project Material Set:

Navigation: The system will automatically open the Contract Materials and Acceptance Action Summary after clicking the **Save** button in the instructions outlined above.

1. Locate the row with the newly created material set.
2. Click the row **Actions** menu on the selected row.
3. Select the **Add a Material** task.
4. In the **Material** field, search for and select the material.
5. In the **Conversion Factor** field, enter the numerical value.
6. Click the **Save** button.

7. Repeat steps 1-6 if other materials need to be added to the set.

Create Acceptance Actions for a Contract Material:

Navigation: Construction > Contract Administration > Contract Administration Summary > Contract Materials and Acceptance Actions quick link > Acceptance Actions tab

1. For the appropriate contract, select the **Contract** link.
2. Click the Contract Materials and Acceptance Actions quick link.
3. Click the **Acceptance Actions** tab.
4. Click the expand arrow for the appropriate project and material.
5. Click the row **Actions** menu for the appropriate project and material and select **Create Contract Acceptance Action**.
6. In the **Name** field, type the name of the acceptance action.
7. In the **Effective Date** field, enter the date the record becomes effective.
8. In the **Expiration Date** field, enter the date that effectiveness ends for the record.
9. In the **Evaluation Method** field, click the drop-down arrow and select the evaluation method.
10. In the **Contract** field, the associated contract will be displayed.
11. In the **Item** field, the associated item will be displayed.
12. In the **Description** field, type a description of this record.
13. Click the **Status** drop-down arrow and select the status.
14. In the **Active** field, the indicator will display the record's active/inactive status.
15. In the **Project** field, the associated project will be displayed.
16. In the **Project Item Line Number** field, the associated project item line number will be displayed.
17. Click the **Save** button.

Maintaining Acceptance Actions for a Contract Material:

Navigation: Construction > Contract Administration > Contract Administration Summary > Contract Materials and Acceptance Actions quick link > Acceptance Actions tab > Contract Material Acceptance Action link > Contract Acceptance Actions Summary

1. Click the expand arrow for the appropriate project and material.
2. Click the row **Actions** menu for the appropriate acceptance action and select the **Open** action.
3. View or edit the **Name**, **Description**, and **Evaluation Method** fields as needed.
4. Click the **Save** button, if applicable.

Create an Acceptance Actions Option:

1. Click the **New** button.
2. In the **Option Name** field, enter the name for an option group in an acceptable action.
3. In the **Option Description** field, enter a description of this record.
4. Click the **Save** button.
5. On the new option row, click the row **Actions** menu and click the **Select Action Relationship** action.
6. Click the row for the action relationship, and then click the **Add to Option** button.
7. Click the **Save** button.
8. Click the expand arrow to display the new row.
9. In the **Action Rate** field, enter how many times the acceptance action occurs.
10. In the **Frequency Type** field, click the drop-down arrow and select the type of frequency unit for an acceptance action.
 - **Note:** Additional fields are displayed depending on the value you select in the **Frequency Type** field. If you select **Source**, the **Source ID** field is displayed. If you select **Temporal**, the **Temporal Type** field is displayed. If you select **Work Location**, the **Work Location** field is displayed. Enter values in the additional fields as needed.
11. In the **Action Frequency** field, enter how often an action occurs.
12. In the **Minimum Quantity Required** field, enter the minimum quantity of a material required before the acceptance action must be performed.

13. Select the **Exclude from Pay Est** check box if you do not want this requirement to be enforced when creating Pay Estimates. Note that when the **Exclude from Pay Est** check box is selected, payment estimate exceptions can still be created without causing an item adjustment.
14. Click the **Save** button.

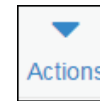
Maintaining Acceptance Actions Options:

1. View or edit the **Option Name** and **Option Description** fields as needed.
2. Click the **Save** button, if applicable.
3. Click the **Option Name** expand arrow.
4. Click the expand arrow for the appropriate **Sample Record**.
5. View or edit the data as needed.
6. Click the **Save** button, if applicable.

Next Steps:

After maintaining contract materials and acceptance actions, the next step is Viewing Mix Designs for Contract Materials. Refer to TDOT Quick Reference Guides and CBTs for more information.

Key to Actions Menus:



Global **Actions** menu
(At the top of the screen)



Component **Actions** menu
(On the heading)



Row **Actions** menu
(On the row)