



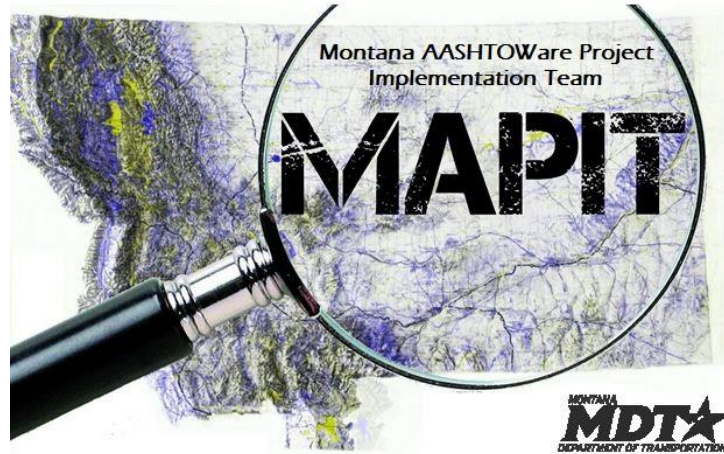
MONTANA DEPARTMENT OF TRANSPORTATION
AASHTOWare Project Construction and Materials



MDT Procedure

Process: Contract Materials & Acceptance Actions

Date: December 5, 2017
Updated: August 26, 2019





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□ **Process Definition**

After the Contract Materials and Acceptance Actions generation is complete, contract material acceptance actions may be modified through the Contract Materials and Acceptance Actions quick link. The main purpose of this process is to provide the ability to make changes to materials contained within a contract line item and the contract materials acceptance actions for that material. Contract materials acceptance actions may change throughout the life of the contract.

□ **Acronyms and Definitions**

ALS – Area Lab Supervisor

DMS – District Materials Supervisor

EPM – Engineering Project Manager

FOP – Field Office Person

MDT – Montana Department of Transportation

□ **MDT Procedure**

1. The EPM will run the Contract Materials Acceptance (Checklist) Report from the Global Action > Generate Report.
 - a. Enter Check in the search filter.
 - b. Select the desired report.
 - c. Enter and select the appropriate contract.
 - d. For all items click on Select All, or check each desired item.
 - e. Click the Execute button.
 - f. Print the report as a PDF and distribute to personnel as needed.
 - g. Save the report as a .PDF to the district share drive.
2. The EPM/FOP will review the report with other office or inspection personnel.
3. The DMS/ALS will review the report, note any recommended changes and send to the Field Office Person to review.
4. The EPM/FOP will modify the Contract Materials and Acceptance Actions for the Contract from the identified modifications.
 - a. Refer to the MT-601 Sampling and Testing Requirements procedure and Special Provisions for information on Sample Types, Acceptance Methods, Rates, Frequencies, entering samples as one per contract, Design Build and Lump Sum items, Production Lot and Shipment Sampling, Item to Multiple Material Associations, time frequency, component materials, and contractor options.
 - b. Navigate to Construction > Contract Progress > {Select Contract} > Contract Materials and Acceptance Actions.

Add a material to a Material Set

- 1) Click on the Materials Tab.



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- 2) Click on the Row Actions button of the project item / material set to add the material to and select Add Material.
- 3) Enter the description or code to search the Material code and select the appropriate material.
- 4) Enter the conversion factor. Refer to Materials Acceptance Actions Reference Item Material Sets business process for examples.
- 5) Click Save.
- 6) The Acceptance Actions will be automatically added under the Acceptance Actions tab.

Material	Material Units	Conversion Factor
551.02.13.01 - Ground Granulated Blat	LB	1.00000

Material	Material Category
Q 551.02.13.01 Ground Granulated Blast Furnace Slag	551.02 - Cementitious Material
Source	Contract Estimated Material Quantity
Q	150.00000
Facility	Reported Material Quantity
Q Begin typing to search or press Enter	60.00000
Conversion Factor	Satisfied Represented Material Quantity
1.00000	10.00000
Material Units	
LB	

Creating a new material set and adding materials

Navigation: Contract Progress > Items > Contract Project Items Tab

1. Click on the appropriate project / category to expand the grouping
2. Click on the **Row Action** menu of the desired item row and select **Create Material Set**

Proj Ln Num	Curr Qty	Curr Ext Amt	Actions
0030		383.400	
> Item		Supplemental Description	
202020058 - REMOVE GUARD ANGLE			
0040		1.000	
> 208010000 - BMP ADMINISTRATION			

There are no actions available.

Tasks

Create Material Set

Delete

3. Enter a short, abbreviated **Material Set** name. This is what will display in the Material Set dropdown list in the DWR Item posting window.
4. Click **Save**.



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▼ Add Contract Project Item Material Set

Project ID: 8061143000 Item ID: 202020058

Material Set*: Project Item Line Number: 0030

Up to 256 characters

- This will redirect to the **Contract Materials and Acceptance Actions** window
- Click on the **Row Action** menu of the newly added material set on the item and select **Add Material**

Project	Description	Catg	Item	Description	Proj L...	Matl Set to...	Material Set*	Material...
8061143000	SF 129-SKD TRTMT E MISSOULA	0001	202020058	REMOVE GUARD ANGLE	0030	0.000	Prepackaged Concrete	Open Row Action Menu
8061143000	SF 129-SKD TRTMT E MISSOULA	0001	202020058	REMOVE GUARD ANGLE	0030	191.700	Structural Steel	Prepackaged Concrete
8061143000	SF 129-SKD TRTMT E MISSOULA	0001	202020058	REMOVE GUARD ANGLE	0030	191.200	Structural Steel	Structural Steel

- Select the **Material**
- Enter the appropriate **Conversion Factor** (usually 1.00000, but can be different as it is calculated as the value in material units for 1 unit of the bid item)
- Click **Save**.
- Repeat Steps 6-9 for each material needed in the material set.

Material: 551.03.02.13 - Prepackaged Concrete Conversion Factor: 1.00000

Material Category: Misc - Miscellaneous

Contract Estimated Material Quantity: 383.40000

Reported Material Quantity: 0.00000

Satisfied Represented Material Quantity: 0.00000

Special Instructions:

Comments:

713.01.00.01 - Water Conversion Factor: 1.00000

Adding new materials to an existing material set

- Click on the **Row Action** menu of the Project Specific material set on the item and select Add Material
- Select the **Material**



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3. Enter the appropriate **Conversion Factor** (usually 1.00000, but can be different as it is calculated as the value in material units for 1 unit of the bid item)
4. Click **Save**.
5. Repeat Steps 1-4 for each material needed in the material set.

Adding new materials to a Project Specific material set (i.e. MISCELLANEOUS WORK)

6. Click on the **Row Action** menu of the Project Specific material set on the item and select Add Material
7. Select the **Material**
8. Enter the appropriate **Conversion Factor** (usually 1.00000, but can be different as it is calculated as the value in material units for 1 unit of the bid item)
9. Click **Save**.
10. Repeat Steps 6-9 for each material needed in the material set.
11. Rename the **Material Set** accordingly (i.e. Paving or Geogrid – AP-1).

Project	Description	Catg	Item	Description	Proj L...	Matl Set to...	Material Set*	Materi...
9250224000	ST. REGIS - EAST	0001	618030250	CROSSOVER-CONST, MAINTAIN, RI	0280		Paving	2
		Material Units		Conversion Factor				
701.02.04.02 - Crushed Base Coarse Grade 6A		CUYD		1.00000				
702.01.01.03 - Performance Graded Asphalt Binder 64-2		TON		1.00000				

Rate Changes

- 1) Click on the Acceptance Actions Tab.
- 2) Expand the applicable Contract Project Item(s).
- 3) Click on the Acceptance Action name link to open the details.

Acceptance Actions

Mix Designs

0 changed Collapse All

Project	Description	Catg	Item	Description	Proj I...	Material	Material Category	Material Set
8651015000	FROID - NORTH & SOUTH	0001	609010112	CURB 4 IN-CONCRETE	0230	701.01.01.01 - Fine Concrete Aggregate	701.01 - Concrete Aggregate	Conventional - Kathy is Cool
		Acceptance Action		Record Type		Record ID		
		T11 - Sieve Analysis -200mesh		MaterialCategory		701.01-Concrete Aggregate		
		T27 - Sieve Analysis		MaterialCategory		701.01-Concrete Aggregate		
8651015000	FROID - NORTH & SOUTH	0001	609010112	CURB 4 IN-CONCRETE	0230	701.01.02.01 - Coarse Concrete Aggregate Gr	701.01 - Concrete Aggregate	Conventional - Kathy is Cool
8651015000	FROID - NORTH & SOUTH	0001	609010112	CURB 4 IN-CONCRETE	0230	701.01.03.01 - Combined/Intermediate Concret	701.01 - Concrete Aggregate	Optimized
8651015000	FROID - NORTH & SOUTH	0001	618030005	TRAFFIC CONTROL DEVICES CB	0250	618.03.02.01 - Cert of Comp for Traffic Control	CERT - Certification Only	NCHRP-350 / MASH

- 4) Expand the appropriate Option.
- 5) Update the Action Rate and/or Action Frequency as applicable.



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Option Name: T11 Option Description: T11

Sample Record

Action Type: TEST - Physical Testing Action Relationship Description: T11

Action Documentation Type: Sample Record Effective Date: 01/01/2001

Expiration Date: Action Frequency: 200.000

Action Rate: Minimum Quantity Required:

Frequency Type: Quantity

Add Additional Options for Material Acceptance

- 1) Click on the Acceptance Actions Tab.
- 2) Expand the applicable Contract Project Item(s).
- 3) Click on the Acceptance Action name link to open the details.

Acceptance Actions

Mix Designs

Q Type search criteria or press Enter Advanced Showing 6 of 6 No Filter

Project	Description	Catg	Item	Description	Proj I...	Material	Material Category	Material Set
8651015000	FROID - NORTH & SOUTH	0001	609010112	CURB 4 IN-CONCRETE	0230	701.01.01.01 - Fine Concrete Aggregate	701.01 - Concrete Aggregate	Conventional - Kathy is Cool
Acceptance Action								
				Record Type	Record ID			
				T11 - Sieve Analysis -200mesh	701.01-Concrete Aggregate			
				T27 - Sieve Analysis	701.01-Concrete Aggregate			
8651015000	FROID - NORTH & SOUTH	0001	609010112	CURB 4 IN-CONCRETE	0230	701.01.02.01 - Coarse Concrete Aggregate Grs	701.01 - Concrete Aggregate	Conventional - Kathy is Cool
8651015000	FROID - NORTH & SOUTH	0001	609010112	CURB 4 IN-CONCRETE	0230	701.01.03.01 - Combined/Intermediate Concret	701.01 - Concrete Aggregate	Optimized
8651015000	FROID - NORTH & SOUTH	0001	618030005	TRAFFIC CONTROL DEVICES CB	0250	618.03.02.01 - Cert of Comp for Traffic Control	CERT - Certification Only	NCHRP-350 / MASH

- 4) Click the New button to add an Option.
- 5) Enter an Option Name (i.e. QPL, Test name, etc.)
- 6) Click the Save button.

New

> T11

Option Name: QPL Option Description:

- 7) Click on the Row Actions button for the Option Name added and click on Select Action Relationship.
- 8) Click on Show First 10 or hit enter in the search field.
- 9) Select the appropriate Action and click on the Add to Option button.



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Select Action Relationship ✕

Showing 3 of 3
1 selected

Select:

Action Type	AR Description	Action Document Type	Effective Date	Expiration Date
TEST - Physical Testing	T27	Sample Record	02/01/2015	
TEST - Physical Testing	T11	Sample Record	01/01/2001	
<input checked="" type="checkbox"/> QCERT - QPL Verification	QPL Verification	Sample Record	02/28/2017	

- 10) Click the Save button.
- 11) Expand the Option to display the rate and frequency details.
- 12) Enter the Action Rate.
- 13) Select the Frequency Type from the dropdown list.
- 14) Enter the Action Frequency.
- 15) Enter the Minimum Quantity Required if applicable.

Action Type QCERT - QPL Verification	Action Relationship Description QPL Verification
Action Documentation Type Sample Record	Effective Date 02/28/2017
Expiration Date	Action Frequency <input type="text"/>
Action Rate <input type="text" value="1"/>	Minimum Quantity Required <input type="text"/>
Frequency Type <input type="button" value="Source"/>	Source ID <input type="text"/>

16) Click the Save button.

5. The EPM, FOP, inspectors and lab personnel will use the custom Sampling and Testing Status and/or Sampling Testing Checklist Reports during the life of the contract to ensure sampling and testing requirements have been met.
6. When a new item has been added to a contract via a Change Order, the system will automatically apply Contract Materials and Acceptance Actions. The EPM/FOP may consult with the DMS/ALS, Testing Engineer or other Helena Materials personnel to ensure Contract Materials and Acceptance Actions are correct for the new item. Note: Materials and acceptance actions are copied from the global materials and acceptance actions which are the most current. If the contract is older, they may need to be revised at the contract level.
7. Some items on the Sampling Testing Status and/or Sampling Testing Checklist Reports will be noted with a Project Specific material set. This is a placeholder indicating the materials and requirements may be different between contracts.
 - a. The EPM/FOP reviews the submittals and contract special provisions to determine the materials involved.



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- b. The EPM/FOP may consult with the DMS/ALS to determine what the Contract Materials and Acceptance Actions are for the project specific item.
 - c. The EPM/FOP adds the appropriate materials and changes the Material Set Description (from Project Specific) if desired. See step 4b for reference for adding a material to the Project Specific material set.
 - d. If there are no materials associated with the project specific item, no action is needed.
- ❑ **IT Systems Interfaces Outside of AASHTOWare Project**
 - ❑ **Process Exceptions**
 - ❑ **Business Change Summary**

Acceptance actions are added automatically when materials are added to a material set. If there are no material requirements under the Project Specific material set, no action is needed.
 - ❑ **Comments**