

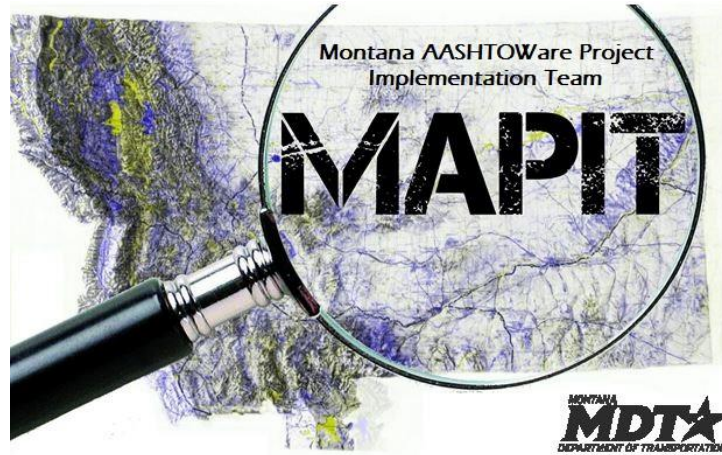


MONTANA DEPARTMENT OF TRANSPORTATION
AASHTOWare Project Construction and Materials



MDT Procedure
Process: Materials/Material Category Acceptance Actions

Date: December 16, 2017





□ **Process Definition**

This is the process to create Acceptance Actions for materials and material categories. This was part of the Sampling and Testing Requirements in SiteManager.

Action Relationships and Acceptance Actions work together.

The action relationship defines an action taken on or for a material. Examples of actions include a physical test, a certification or a visual inspection. The action relationship defines the action, where that action is documented (sample record, DWR or DSR), details of the action (e.g. acceptance method, sample size, etc.) and test method.

The acceptance action defines how the action relationship is going to be applied to a contract item. It includes the rate and frequency of the action and if there are optional actions that can satisfy the requirement. An example of an option is allowing a material to be accepted by QPL verification or test & certification. Note, the action relationship is tied to the acceptance action through the option, so each acceptance action must have at least one option.

Acceptance actions can be created on the material or material category. If an acceptance action is created on a material category, each material within the category inherits that acceptance action. An action relationship does not get applied to a contract item unless there is an acceptance action. Those also can be created on the material or material category. An acceptance action on a material can use an action relationship created on the material or inherited from the material category.

All requests for new action relationships or modifications to existing action relationships are submitted to MBA or the Helpdesk. Once approved by MBA, the Materials Testing Engineer, Testing Operations Supervisor or Inspection Operations Supervisor will modify the materials as appropriate.

- ❖ New action relationships or modifications are typically related to changes to specifications or the MT 601.
- ❖ Modifications typically require close coordination with specifications, MT 601 and testing to ensure contracts receive the correct requirements on the correct dates.

□ **Acronyms and Definitions**

DSR – Daily Source Report

DWR – Daily Work Report

MBA – Material Bureau Administrator

QPL – Qualified Products List

□ **MDT Procedure**

Navigation: Reference Data > Material Categories > Acceptance Actions tab

Note: in most cases, the action relationship will be created on the material category. The action relationship can then be associated to an acceptance action at the material



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category level or the material. See process NP_Action_Relationships for details on action relationships.

1. Click New
2. Enter an Acceptance Action Name (i.e. Concrete Properties)
3. Enter the Effective Date
4. Change the status to Active

Note, the acceptance action can be created before the effective date and left inactive. This allows changes to be made when specifications or the MT 601 are revised without having to wait until the letting date.

5. Select an Eval Method if different than Record Count
6. Click Save

Overview

Material Category Summary

Material Category: 701.02.8

General

Qualifications

Associated Materials

Acceptable Alternates

Associated Sources

Associated Facilities

Action Relationships

Acceptance Actions

0 added | 0 marked for deletion | 0 changed

Name	Description	Effective Date	Expiration Date	Status	Eval Method
Compatability Verification		03/10/2016		ACTIVE - Active	Record Count
Gradation		03/10/2016		ACTIVE - Active	Record Count

7. Click on the Row Action button and select Open

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- Actions
- Delete
- Duplicate Row
- Exclude from Search Results
- Insert Row
- Open
- Views
- Attachments
- Links
- Tracked Issues

8. Enter an Option Name (i.e. Concrete Properties)
9. Click Save
10. Click on the Row Action button and select Select Action Relationship



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Overview

Acceptance Actions Summary

Acceptance Actions : Compatability Verification Save ?

Material Category: 701.02.8-Cover Aggregate

General	Name	Description
Items	Compatability Verification	
Item Families	Effective Date	Status
	03/10/2016	ACTIVE - Active
	Expiration Date	Active
		Yes
	Evaluation Method	
	Record Count	

New 0 added 0 marked for deletion 0 changed

Option Name	Option Description	Actions
Compatability Verification		<ul style="list-style-type: none"> Delete Duplicate Row Insert Row Select Action Relationship... Views Attachments Links Tracked Issues

<https://webformsportdev2.mdt.mt.gov/AcceptanceAction/71/SelectActionRelationshipModalComponent/AcceptanceActionId=71>

- Click in the search box and hit Enter or click Show first 10
- Select the appropriate action relationship for this acceptance action
- Click Add to Option

Select Action Relationship ×

Advanced Showing 2 of 2 1 selected

Select: All | None

Action Type	AR Description	Action Document Type	Effective Date	Expiration Date
<input checked="" type="checkbox"/> CERT - Certification	Compatability Verification	Daily Work Report	12/04/2017	
<input type="checkbox"/> TEST - Physical Testing	Cover Gradation	Sample Record	12/04/2017	

Add to Option

- Click Save
- Click the carrot to expand the option
- Select the appropriate Frequency Type (Quantity, Contract, Source, Work Location, Temporal)
- Enter the Action Rate and Frequency
 - If the frequency type is quantity, action rate and frequency are required
 - If the frequency type is anything else, action rate is required
 - If the frequency type is temporal, the Temporal Type is required (e.g. day)



18. If applicable, enter the Minimum Quantity Required (this is the minimum quantity of material that must be used before a test is required)

19. Click Save

The screenshot shows the 'Acceptance Actions Summary' page in the AASHTOWare Project software. The page title is 'Acceptance Actions Summary' and the sub-header is 'Acceptance Actions : Compatibility Verification'. The material category is '701.02.8-Cover Aggregate'. The page includes a navigation menu with 'Home', 'Previous', and 'My Pages'. There are also 'Actions', 'Help', and 'Log off' buttons. The main content area displays a table with columns for 'Name', 'Description', 'Effective Date', 'Status', 'Expiration Date', 'Active', and 'Evaluation Method'. The table shows one record for 'Compatibility Verification' with an effective date of '03/10/2016' and a status of 'ACTIVE - Active'. Below the table, there is a 'New' button and a summary of changes: '0 added | 0 marked for deletion | 0 changed'. A detailed view of the 'Compatibility Verification' option is shown, including fields for 'Option Name', 'Option Description', 'Action Type', 'AR Description', 'Action Documentation Type', 'Effective Date', 'Expiration Date', 'Action Frequency', 'Action Rate', 'Minimum Quantity Required', and 'Frequency Type'.

20. For additional options, click New and repeat steps 8 through 19

If the acceptance action will be created on the material, go to the Material Category > Associated Materials tab and click on the Material Code link. Go to the Acceptance Actions tab. The remainder of the process is the same.

- ❑ **IT Systems Interfaces Outside of AASHTOWare Project**
- ❑ **Process Exceptions**
- ❑ **Business Change Summary**

The concept of an acceptance action is new but the ability to associate the rate and frequency at a high level will make the associations of materials to items much more efficient.

- ❑ **Comments**



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Acceptance Actions will be created for both acceptance via the Daily Work Report and Sample Record for QPL Certification and Certifications. Physical Testing will be done only via the Sample Record.