

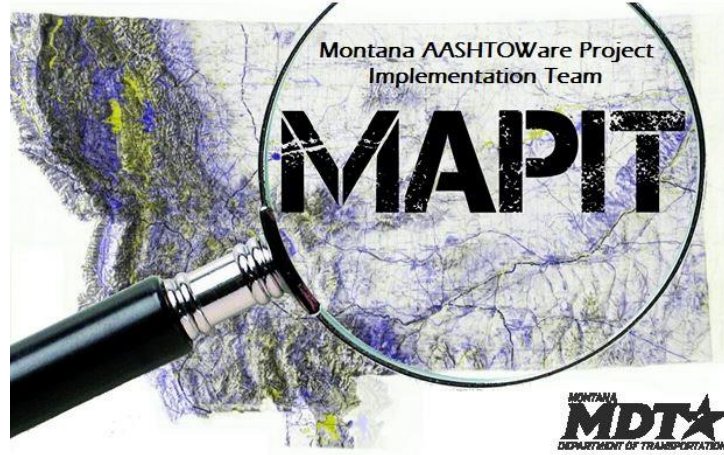


MONTANA DEPARTMENT OF TRANSPORTATION  
AASHTOWare Project Construction and Materials



MDT Procedure  
Process: Materials/Material Category Action Relationships

Date: December 16, 2017





## MONTANA DEPARTMENT OF TRANSPORTATION AASHTOWare Project Construction and Materials



### □ **Process Definition**

This is the process to create Action Relationships 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 test method is associated with an agency view but is not the agency view itself.

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.

An action relationship is required to tie a test method to a test assignment, which defines what tests can be added to a sample record and which lab unit can perform the test. Reference specifications are defined on the action relationship.

Action relationships can be created on the material or material category. If an action relationship is created on a material category, each material within the category inherits that action relationship. However, the 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 - Action Relationship for a Daily Work Report**

Navigation: Reference Data > Material Categories > Action Relationships 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 category level or the material. See process NP\_Material\_Acceptance\_Actions for details on acceptance actions.

1. Click New
2. Enter an Action Relationship Description (i.e. QPL Certification)
3. Select Daily Work Report from the Action Documentation Type dropdown
4. Either enter an Agency View Name or Field Inspection Value (Certification Reviewed, QPL Verified, Visually Inspected, etc.)

Note, you can utilize one or the other, but not both.

5. Enter the Effective Date
6. Change the status to Active

Note, the action relationship 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.

7. Click Save

❑ **MDT Procedure - Action Relationship for a Sample Record**

Navigation: Reference Data > Material Categories > Action Relationships tab



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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 category level or the material. See process MAA\_NP\_Acceptance\_Action for details on acceptance actions.

1. Click New
2. Enter an Action Relationship Description (i.e. Fly Ash Chemical Analysis)
3. Select Sample Record from the Action Documentation Type dropdown
4. Select the applicable Test Method
5. Select the Acceptance Method
6. Select the Sample Type
7. Enter the Sample Size
8. Select the Test Responsibility
9. Select the Sample Responsibility
10. Select the Sample Units
11. Enter the Effective Date
12. Change the status to Active

Note, the action relationship 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.

13. Click Save

The screenshot shows the 'TEST - Physical Testing Sample Record' form for 'Fly Ash Chemical Analysis'. The form is organized into two main columns of fields:

- Left Column:**
  - Action Type:** TEST - Physical Testing
  - Action Documentation Type:** Sample Record
  - Test Method - Description:** FlyashChemicalProp (Flyash Chemical Property Tests)
  - Special Instructions:** (Empty text area)
  - Acceptance Method:** TEST - Test Results
  - Sample Type:** APPR - Approved Material Check
  - Sample Size:** (Empty text field)
  - Effective Date:** 04/21/2017
  - Expiration Date:** (Empty text field)
- Right Column:**
  - Action Relationship Description:** Fly Ash Chemical Analysis
  - Test Start Duration:** (Empty text field)
  - Test Responsibility:** MTRL - Materials Bureau
  - Approved Source Required:** (Unchecked checkbox)
  - Sample Responsibility:** FLD - Field Construction
  - Sample Location:** (Empty text field)
  - Sample Units:** (Empty dropdown menu)
  - Status:** ACTIVE - Active
  - Active:** Yes



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For both types of action relationship:

If the action relationship will be created on the material, go to the Material Category > Associated Materials tab and click on the Material Code link. Go to the Action Relationships 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 action relationship is new but has components that are similar to the Sampling and Testing Requirements in SiteManager.

- ❑ **Comments**

Action Relationships 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.