



QUICK REFERENCE GUIDE:

Maintaining Contract Material Requirements

Background:

You've generated the Contract Material and Acceptance Actions and now you need to modify some item's material sets, materials, and acceptance action requirements on a Contract.

If you have not generated the Contract Materials see *Contract Materials - Setting up Contract Material Requirements* QRG.

Roles:

Materials Rover

*Other roles can view Contract Requirements in the system or can generate the *Contract Material Acceptance Report*

Navigation:

Construction > Contract Administration >

1. On the Contract Administration Overview, use the search to find the Contract, click the **Contract** link.
2. On the Contract Administration Summary page, click the **Contract Materials and Acceptance Actions** quick link at the top of the page.
3. What are you modifying on the Contract?
 - a. An item needs a material set (example: Material set is listed as "Project Specific – Add Materials") – Start at step 4.
 - b. An additional material to a material set – Start at step 11.
 - c. Delete material from material set – Start at step 17.

- d. Delete a material set from an item – Start at step 26.
- e. Add/edit acceptance action on a material – Start at step 30.
- f. Delete an acceptance action on a material – Start at step 21.
- g. Copy a material set – Start at step 38.
- h. Regenerate CMAA – Start at step 43.

To add a material set to an item:

4. On the Contract Materials and Acceptance Actions Summary page, expand the row of the item material set you want to review. If it is listed as "Project Specific – Add Material" then you already have a Material Set created but you will need to add Materials. Go to Step 11.
5. If the item does not exist in the list or you need an additional material set, click the **Items** quick link at the top of the page.
6. Select the **Contract Project Items** tab on the left.
7. Find the desired item, click the **Row Actions Menu**, and select the **Create Material Set** link.
8. On the Add Contract Project Item Material Set Material Summary page, enter a value in the **Material Set** field (Examples: Default, Special Provision, 2", etc.)
9. Click **Save**.
10. The system brings you to the Contract Materials and Acceptance Actions Summary page, where a new empty material set has been created. Continue to step 11.

To add a material to a material set:

11. On the Contract Materials and Acceptance Actions Summary page, on the Materials tab, find the material set for which you want to add a material. Expand the row.

If you need further assistance please contact your Module Admin
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12. If there is NOT an empty material, click the **Row Actions Menu** and click **Add Material**.
13. In empty material row, fill out the **Material** field.
14. In the **Conversion Factor** field, enter how many units of the material go into each unit of the item (this is normally '1').
15. Click **Save**.
16. Repeat steps 12 -15 as needed.

To delete a material from a material set:

17. On the Contract Materials and Acceptance Actions Summary page, navigate to the item material set. Expand the row.
18. On the material that needs removed, click the material **Row Actions Menu** and click **Delete**.
19. Click **Save**.
20. Repeat steps 17-20 as needed.

To delete acceptance action on a material:

21. From the Contract Materials and Acceptance Actions page, click Acceptance Actions tab, find the desired material. Expand the material to expose the Acceptance Actions.
22. Click the **Row Actions Menu** of the Acceptance Action.
23. Click **Delete**.
24. Repeat steps 21 – 23 as needed.
25. Click **Save**.

To delete an entire material set:

26. On the Contract Materials and Acceptance Actions Summary page, on the Materials tab, find the material set for which you want to delete.

27. Click the **Row Actions Menu** of the Material Set.
28. Click **Delete**. Note this will remove it from the Material Tab along with the associated acceptance actions. You can't undo this task after you save.
29. Click **Save**.

To add or edit an acceptance action to a material:

Note: If you need to modify existing rates/frequencies, skip to step 36.

30. On the Contract Materials and Acceptance Actions Summary page, on the Acceptance Actions tab, find the desired material. Click the **Row Actions Menu**, and click **Create Contract Acceptance Action**.
31. On the Add Contract Acceptance Action Summary page, fill out the following fields:
 - a. **Name** – standard naming convention is Sample Type – Common Name – Unit of Measure if applicable (example ACPT-Gradation or QUAL-Manufacturer Cert or ASSR – Density – SY)
 - b. **Effective Date** – Today's date
 - c. **Evaluation Method** – Indicates whether the acceptance action will be evaluated by quantity, record count, or both, when determining whether acceptance actions have been satisfied for a contract project item's material. This is usually **Record Count**.
 - d. **Status** – **ACTIVE**
32. Click **Save**.
33. On the Contract Acceptance Action Summary page, enter the test method's general name or type of cert in the **Option Name** field and click **Save**.
34. Click the **Row Actions Menu** of the Option you just created. Click **Select Actions Relationship...**



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35. In the Select Action Relationship modal, click on the row of the desired action relationship, and click the **Add to Option** button. *Note: If you do not see the appropriate action relationship reach out to the Global Material Admin.*
36. On the Contract Acceptance Action Summary Page, expand the **Option Name** and then expand the **Action Relationship** (label should read **Daily Work Report** or **Sample Record**). Fill out or edit the following fields:
 - a. **Action Rate** – how often it occurs. This is usually **1**. (Example: a Cert that is required 1 per Contract. You would enter Action Rate = 1, Frequency Type = Contract. And nothing in the Action Frequency)
 - b. **Frequency Type** – how is this tracked. (Example: testable quantity is tracked by Quantity or in the case of a quality test it may be 1 per Contract)
 - c. **Action Frequency** – when you use a Frequency Type of Quantity or Temporal, the action rate interacts with the action frequency. (Example: For a Gradation tested every 2,000 Tons. You would enter Action Rate = 1, Action Frequency = 2,000, Frequency Type = Quantity)
 - d. **Comments** –
37. Click **Save**.

To regenerate contract materials and acceptance actions:

38. On the Contract Materials and Acceptance Actions Summary page, on the Materials tab, find the material set for which you want to copy.
39. Click the **Row Actions Menu** of the Material Set.
40. Click **Copy Material Set...**

41. In the **Copy Contract Project Item Material Set** modal, give the material set a name.
42. Click the item you want to copy the material set to and click the **Add to Contract Project Item** button.

To regenerate contract materials and acceptance actions:

CAUTION: If you have made any adjustments in the Contract Materials and Acceptance Actions area, regenerating CMAA will delete them. Only continue if you want to restart your editing from scratch.

43. On the Contract Administration Overview, use the search to find the Contract, click the **Contract** link.
44. On the Contract Administration Summary page, click the **Contract Materials and Acceptance Actions** quick link at the top of the page.
45. Click the **Component Actions Menu** and click the **Regenerate Materials and Acceptance Actions**.

Next Steps:

Review the *Contract Material and Acceptance Action Report* to ensure it reflects all changes made on the Contract.

Notify project personnel that the Contract Materials have been set up.