

## Contract Materials - Maintaining Contract Material Requirements

**BACKGROUND:** Once contract materials and acceptance actions have been generated (see *Contract Materials - Setting Up Contract Material Requirements* QRG), the Contract Materials and Acceptance Actions Summary displays a list of material sets, materials, and acceptance actions required for the items on the contract. Each listed acceptance action may include multiple options, each with one or more rate/frequencies that define how many records are required. This list is initially generated from Reference Items and their associated information, and the system uses it in evaluating material sufficiency and preparing payment estimates on a contract.

You may need to add to or edit the list that the system has built, if your contract has special provisions or other particular requirements. Note that the system cannot delete individual material sets, materials, or acceptance actions from the Contract Materials and Acceptance Actions area, but you can zero out the requirement. To erase the entire Contract Materials and Acceptance Actions list and start again, you can use Regenerate Contract Materials and Acceptance Actions.

**ROLES:** Materials Rover

**NAVIGATION:**

Construction > Contract Administration >

1. On the Contract Administration Overview page, type the name of the desired contract in the search field and 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. The system opens the Contract Materials and Acceptance Actions Summary page. On the Materials tab, each row lists one material set linked to one item on the contract. Once expanded, each material set row contains one row for each material within the set. On the Acceptance Actions tab, there is a row for each material within a material set on any of the contract's items. Once expanded, each material row contains one row for each acceptance action linked to the material.

*To add a material set to an item:*

3. From the Contract Materials and Acceptance Actions Summary page, click the **Items** quick link at the top of the page.
4. Select the **Contract Project Items** tab on the left.
5. Use the arrow on the left to expand the project that contains the item to which you want to add a material set.
6. Find the desired item, click on the blue arrow on the right to open its Row Actions menu, and select the **Create Material Set** link.
7. On the Add Contract Project Item Material Set Material Summary page, enter a value (Examples: Default, 2", 3", etc.) in the **Material Set** field and click **Save** in the upper right corner. The system brings you to the Contract Materials and Acceptance Actions Summary page, where a new empty material set has been created.

*To add a material to a material set:*

8. 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. Click the blue arrow on the right to open its Row Actions menu, and select the **Add Material** link.
9. In the new row that is created, begin to type the name of the material in the **Material** autocomplete field, and select it when it populates.
10. In the **Conversion Factor** field, enter how many units of the material go into each unit of the item.
11. Click **Save** in the upper right corner.

*To “delete” a material from a material set:*

12. The system cannot delete a contract material, but it can effectively zero it out. On the Contract Materials and Acceptance Actions Summary page, on the Materials tab, expand the desired material set row and find the material you want to delete. Expand the material row and enter 0 in the **Conversion Factor** field.
13. If your “deleted” material has or will be reported on, you will need to zero out the associated acceptance actions too. . On the Contract Materials and Acceptance Actions Summary page, on the Acceptance Actions tab, use the search and filter fields at the top of the page to find the desired material, on the right item, in the right material set. Click the arrow on the left to expand its row.
14. If there are any acceptance actions listed, click on the **Acceptance Action** link for the first one.
15. On the Contract Acceptance Action Summary screen, modify the acceptance action to keep it from being enforced. Click the arrow on the left to expand each option, click the arrow on the left to expand each rate/frequency, and enter 0 in the **Action Rate** field for each one.
16. Click **Save** in the upper right corner.
17. Click the **Contract Materials and Acceptance Actions** quick link at the top of the page.
18. Repeat steps 12-15 for each subsequent acceptance action on the contract material you are deleting.

*To “delete” acceptance action on a material:*

19. From the Contract Materials and Acceptance Actions page, click Acceptance Actions tab, use the search and filter fields at the top of the page to find the desired material, on the right item, in the right material set. Click the arrow on the left to expand its row.
20. Click the Acceptance Action link
21. On the Contract Acceptance Action Summary screen, modify the acceptance action to keep it from being enforced. Click the arrow on the left to expand each option, click the arrow on the left to expand each rate/frequency, and enter 0 in the **Action Rate** field for each one.
22. Click **Save** in the upper right corner.
23. Repeat steps 12-15 for each subsequent acceptance action on the contract material you are deleting.

*To add an acceptance action to a material:*

*Note: If you need to modify existing rates/frequencies, skip to step 30.*

24. On the Contract Materials and Acceptance Actions Summary page, on the Acceptance Actions tab, use the search and filter fields at the top of the page to find the desired material, click on the blue arrow on the right to open its Row Actions menu, and click on the **Create Contract Acceptance Action** link.
25. On the Add Contract Acceptance Action Summary page, enter a value in the **Name** field, enter today's date in the **Effective Date** field, and select ACTIVE in the **Status** dropdown.
26. Click **Save** in the upper right corner.
27. On the Contract Acceptance Action Summary page, enter a value in the **Option Name** field and click **Save** in the upper right corner.
28. For the option you have just created, add a rate/frequency. Click on the blue arrow on the right to open the Row Actions menu, and click on the **Select Action Relationship** link. (An action relationship associates a material category or material with an action that can be performed upon it. See *Global Materials - Action Relationships* QRG.)
29. In the Select Action Relationship window, click on the row of the desired action relationship, and click on the **Add to Option** button at the bottom of the page.
30. Click on the arrow on the left to expand your new rate/frequency and add information to define the new material requirement.
31. Click **Save** in the upper right corner.

*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.

32. From the Contract Administration Overview page, use the search and filter fields at the top of the page to find the desired contract, click on the blue arrow on the right to open its Row Actions menu, and click the **Regenerate Materials and Acceptance Actions** link. The system deletes the content in the Contract Materials and Acceptance Actions area and rebuilds it from reference items and their associated material sets, materials, and acceptance actions.

**Next Steps:**

Notify project personnel that the Contract Materials have been set/modified.