



QUICK REFERENCE GUIDE:

Acceptance Actions

Background:

An acceptance action establishes what samples, tests, or field inspections are required for the acceptance and approval of the materials in a material category, or of just a single material. It may include multiple options, each with one or more rate/frequencies, such as one daily work report per contract, or three slump tests per 50 cubic yards installed, or one certification per source used.

There is a link on the Dashboard to all the acceptance actions that have been created in the system, but working with an acceptance action is best done from the material category (or material) it is created on.

Roles:

Global Materials Admin

Navigation:

Materials Reference Data > Material Categories >

1. On the Material Category Overview page, use the search and filter fields to find the desired material category and click on its **Material Category Code**.
2. On the Material Category Summary page, select the **Acceptance Actions** tab on the left. The system displays the acceptance actions that have been set up on this material category. In most cases, these are grouped by the units used by testing requirements; for example, the Embankment material category has one acceptance action with all the requirements that are set per ton, and another with all the requirements set per cubic yard.

To add a requirement to an existing acceptance action:

3. Find the acceptance action you wish to modify and, in its Row Actions menu on the right side, click on **Open**.
4. Options are different sets of documents that can be provided to achieve sufficiency. Using the arrow on the left, expand the option you wish to modify.
5. To add a requirement to an option, you need to add a rate/frequency row. Do this by opening the option's Row Actions menu on the right side, and click on **Select Action Relationship**.
6. In the Select Action Relationship window, select the action relationship with a description matching the test method or documentation requirement you wish to add, and click the **Add to Option** button in the bottom right.
7. Click the arrow to expand the new rate/frequency row. Three fields here determine how many records will be required for acceptance: the system divides the Action Rate by the Action Frequency, and compares it to the Frequency Type and related conditional fields.
 - a. For one record per source, select Source in the **Frequency Type** dropdown and enter 1 in the **Action Rate** field.
 - b. For three records per 2500 units, select Quantity in the **Frequency Type** dropdown, enter 3 in the **Action Rate** field, and enter 2500 in the **Action Frequency** field.
 - c. For one record per contract, select Contract in the **Frequency Type** dropdown and enter 1 in the **Action Rate** field.
8. If there is a minimum quantity installed below which documentation is not required, enter it in the **Minimum Quantity Required** field.
9. Click **Save** in the upper right corner.

To add a new acceptance action:

If you need further assistance please contact your Module Admin
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1. Click the **New** button to add a new acceptance action. All materials in the category will inherit it.
2. In the blank row that is created, enter a **Name** and **Description** for the new acceptance action.
3. In the **Effective Date** field, enter today's date.
4. In the **Status** dropdown, select ACTIVE.
5. In the **Eval Method** dropdown, select Record Count.
6. Click **Save** in the upper right corner.
7. On the row you have just created, open the **Row Actions** menu on the right side and click **Open**.
8. Enter values in the **Option Name** and **Option Description** fields.
9. See steps 5-8 in the *To add a requirement to an existing acceptance action* section to add a rate/frequency to the option.
10. Click **Save** in the upper right corner.

Next Steps: