Policy & Procedure Document

Last Modified: 04/15/2010
Reviewed for Version: SiteManager 3.7

SECTION: 1100 - Materials Management

ITEM NUMBER: 1105.2

ITEM: SAMPLER QUALIFICATIONS   **REVISED: 04/15/2010**

SCOPE:

To establish the policy and procedure for maintaining the SiteManager Sampler Qualification information.

GENERAL:

The following Policy defines the proper input of sampler qualifications using SiteManager windows and input screens. The current process of sampler qualification input (as of approx 2009) is the responsibility of the Construction Division, which does not utilize the SiteManager windows. Sampler qualification data may not agree with this policy. Direct all questions and support requests concerning this information to the State Construction Engineer.

The Sampler Qualification window is used to enter and view Samplers and their qualifications. In SiteManager, material sampling functions may include visual verifications and certification confirmations. When the Sampler checkbox is checked in the Material User window, a filtered list of Samplers show up when using the search lens of the "Sampler" field in a sample record. In OkDOT, all persons qualified or certified to test and/or take samples are entered in the Sampler Qualification window. The Central Lab will enter Material Division personnel qualification data from the Central Lab into SiteManager, and the Training Center will enter inspector qualification data for certifications issued at the Training Center.

Since SiteManager has separate tables and windows for Sampler and Tester Qualifications, OkDOT procedure will be to populate the two tables simultaneously whenever a person's certification and/or qualification status changes.

To access the Sampler Qualification window, you first select a user from a Material User picklist. The Sampler Qualification area contains two windows.   The upper window is a view of Material User information. The lower window displays Sampler Qualifications that have been assigned to that user.:

In the Material User window:

User ID - An eight character alpha field, typically in the format of first initial and last name, all lower case. If the user is a SiteManager user, this is their SM User ID.

User Name - The name assigned to the user ID.

Geographic Area - This field is for indicating where the inspector is located. Due to the Geographic Area options (Counties) and mobile nature of Inspectors, this field will not be used.

4 Check Boxes (SM Security User, Sampler, Tester, Global Tester) - Selections made by a System Administrator in the Material User Window.

Sampler Qualifications Window:

Type - This is a selection from the Material Detail Category dropdown list. This is a key valildation field that allows a Sampler to be selected in the Sample Information Window when sampling materials requiring Unexpired Material Technician Certification status. There are six possible selections that should be used; AM Series, and the five with the word, "(Controlled)".

Level - This is the level of the qualification. The available choices include Aggregates (AG), Central Lab Testing (CL), Asphalt Sampler (AS), Asphalt (A), PC Concrete (C), Materials Sampler (MS), Profilograph (P), and Soils (S), AM Series.

Method - This is the method of qualification. The available choices include: Pers-Lab Accreditation System, Lab-Quality System Approval, Lab-Residency Lab Inspection, and Pers(TC)-ACI Extension, Pers(TC)-Apprenticeship, Pers(TC)-Certification Testing, Pers(TC)-Temporary Certification. In OkDOT, the field will typically be either Pers-Lab Accreditation System (Central Lab) or Pers(TC)-Certification Testing.

Effective Date - **This is the date the particular qualification became effective.

Expiration Date - **This is the date the particular qualification expires.

** When there is a recertification or requalification of the same Type, Level and Method, SiteManager will not allow a duplicate line entry unless one of the lines has an expired date, and the active indicator shows, "N".

- **Generic Fields:** The OHCMTCB Registration number is displayed in the generic field.

- *Address Icon*

Displays address and contact information defined in the Material User window.

08/20/2009: REVISION ADDING SPECIAL NOTE:

This Special Note is being added to the following P&P's:
1105.2 Sampler Qualifications
1105.9 Tester Qualifications

To acquire the necessary Sampler and Tester data, Materials Admin. Built and maintained a utility named 37_MAT_USER_DATA_REQS.mdb for use by the following areas that input data in these windows:
System Admin
Materials Division
Training Center

This utility included 3 independent data tables, which Materials Admin maintained to work in conjunction with SiteManager data tables so users could select a Level and Method combination to produce a list of the data that needed to be manually entered into the Sampler and Tester Qualification windows.

At the time of this note, these were the Level and Method options available for selection:

Aggregates	Pers(TC) - Apprenticeship
Aggregates	Pers(TC) - Certification Testing
Aggregates	Pers(TC) - Temporary Certification
AM Series	System Admin
Asphalt	Pers(TC) - Apprenticeship
Asphalt	Pers(TC) - Certification Testing
Asphalt	Pers(TC) - Temporary Certification
Asphalt Mix Design Lev. 1	Pers(TC) - Apprenticeship
Asphalt Mix Design Lev. 1	Pers(TC) - Certification Testing
Asphalt Mix Design Lev. 1	Pers(TC) - Temporary Certification
Asphalt Mix Design Lev. 2	Pers(TC) - Apprenticeship
Asphalt Mix Design Lev. 2	Pers(TC) - Certification Testing
Asphalt Mix Design Lev. 2	Pers(TC) - Temporary Certification
Asphalt Sampler	Pers(TC) - Apprenticeship
Asphalt Sampler	Pers(TC) - Certification Testing
Asphalt Sampler	Pers(TC) - Temporary Certification
Central Lab S/T	Pers - Lab Accreditation System
Materials Sampler	Pers(TC) - Apprenticeship
Materials Sampler	Pers(TC) - Certification Testing
Materials Sampler	Pers(TC) - Temporary Certification
PC Concrete	Pers(TC) - ACI Extension
PC Concrete	Pers(TC) - Apprenticeship
PC Concrete	Pers(TC) - Certification Testing
PC Concrete	Pers(TC) - Temporary Certification
Profilograph	Pers(TC) - Apprenticeship
Profilograph	Pers(TC) - Certification Testing
Profilograph	Pers(TC) - Temporary Certification
Soils	Pers(TC) - Apprenticeship
Soils	Pers(TC) - Certification Testing
Soils	Pers(TC) - Temporary Certification
Special – 01	System Admin

Recently Materials Admin. Learned of the likely existence of another utility having been created by Ann Wilson and was being used by the Training Center (and possibly others) that actually populated this data into the SiteManager tables. At this time, this other utility was not using data tables maintained by Materials Admin. to assure requirements were met.

Since it is Materials Admin.'s responsibility to set data requirements, Materials Admin. will continue to maintain 37_MAT_USET_DATA_REQS.mdb and recommend its usage until otherwise advised.   However, Materials Admin. now needs to also notify Ann Wilson by email whenever:

1. A new Level/Method combination is created
2. A new Test Method is added or removed from a Level/Method combination

Until Materials Admin. can otherwise set requirements for the data actually being entered, Materials Admin. needs to take these steps to advise Ann Wilson she needs to update the utility she created accordingly.

04/15/2010: Added a new first paragraph to the General Section, defining responsibility for the data. Deleted the "SiteManager Access Assignments" table in the General Section.