

Quick Reference Guide

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Reviewed for Version: SiteManager 3.7

Generating Materials on a Contract

Scope:

This is a guide describing the procedure to generate materials on a contract. June 2007 performance of this function became the responsibility of the Transport Branch.

General:

The process of generating materials creates sampling and testing requirements on pay items for a contract. Prior to generating materials, review the Outstanding Item list (OIL). **See the Outstanding Item List QRG for discussion about what should and should not be on the OIL, and proper notification procedures to resolve OIL issues.** After determining global Sampling and testing requirements have been set up on specific items, the materials generation process will be ran.

Generate Materials process can only be ran once. It cannot be undone. If there is a pay item on the Outstanding Item list that should have SiteManager documented sampling and testing requirements, and contract materials are generated, sampling and testing requirements can be added later using the Services > Copy Item Records feature in the Contract Sampling and Testing Window.

Procedure:

1. Navigate to: [Materials Management > Contract Materials \(+\) > Contract Materials](#).
2. Scroll to the contract, click on the contract once to highlight it.
3. Choose [Services > Outstanding Item List](#). The Outstanding Item list shows all pay items on the contract that have no Sampling and Testing requirements associated to it.
4. This will create a report that automatically prints to the user's default printer.
5. Review the Outstanding Item List. If any listed pay items should have sampling and testing requirements, notify the Materials Division. Be prepared to discuss needed test methods, sampling/testing frequencies, conversion factors, etc. (See the QRG, "Outstanding Item List").
6. The Materials Division SiteManager Administrator will input the necessary global sampling and testing requirements for the pay items.
7. Review the Outstanding Item List again. The only pay items on the list should be items with no sampling and testing requirements.
8. If the list is good, generate materials: Choose [Services > Generate](#).

9. Run the sampling checklist process. This updates and writes specific S&T requirements to the sampling checklist on a contract. Instructions for running this process are provided in the QRG, "Sampling Checklist".
10. A copy of the OIL and the Sampling Checklist will be sent to the Residency.

Summary of changes:

10/16/2006: Added a new step 11 instructing users to run the sampling checklist process after generating materials.

5/22/2007: Deleted all language discussing the need to set up the sampling checklist process to run daily. Deleted instructions describing how to set up the sampling checklist process to run daily.

6/28/2007: Deleted all language making any reference to Residency personnel responsibility for generating contract materials. Deleted all language referring to the need to update the checklist event date for generating materials. Add a new step ten about sending a copy of OIL and sampling checklist to Residency.