

Quick Reference Guide

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Reviewed for Version: SiteManager 3.4a-1, SiteManager 3.7

Mat'l Sampling & Testing Req. (revising on a contract)

There will be occasions where Sampling and Testing requirements will need to be revised on a contract. Examples include:

- Certain pay items that never have default sampling and testing requirements defined, because of contract specific variable material quantities (example: adding concrete parapet wall to existing walls). **If an item was on the Outstanding Item List when materials were generated, that item is not initially available for selection in the contract S & T pick list. The only way to add S&T requirements for items on the OIL is to first select an Item with Contract S&T requirements, then use the Services > Copy feature. After you select an item and material to copy from, all of the contract pay items are now available in the pick list to copy to. See examples 1 & 2 below:**
 - **Example 1:** You have a similar pay item you can copy S&T requirements from.
 - **Example 2:** You do **not** have a similar pay item to copy from.
- Pay items with several material code options, or dual/optional units (aggregate base) may need a conversion factor and material unit change.
 - **Example 3:** Illustrates changing a material code from "type A aggr base" to "type B aggr base".
- Concrete mix design that is substantially different than the "typical" mix design used to set up default conversion factors. For example, you may need to revise conversion factors and/or change the conversion factor to zero for fly ash if fly ash isn't used.

Changes to Contract Sampling and Testing requirements should include a remark added in the remark icon  available on the **Sample and Test** Tab of the material on the item. **Remarks should be brief. Do not add blank lines in the remarks field. Most custom reports will only display the first 255 characters in a remarks field.**

Be sure to read the Policy and Procedure 1103.2 "Contract Sampling and Testing" for additional guidance. When determining conversion factors you need to be very aware of the material units (SY, TON, CY, etc.). The conversion factor relates the amount of material in a unit of pay item.

To see the effects of your revisions to the contract Sampling and Testing Requirements, you must first run the Sampling Checklist process. Running this process writes the changes made in contract Sampling and Testing to the Sampling Checklist.

To run the Sampling Checklist Process, navigate to:

- Main Panel > Materials Management > Process List
- Double click on the RMMSMPCL Process ID
- Select your contract and click Submit

The following examples assume materials have been generated on the contract.

Example 1:

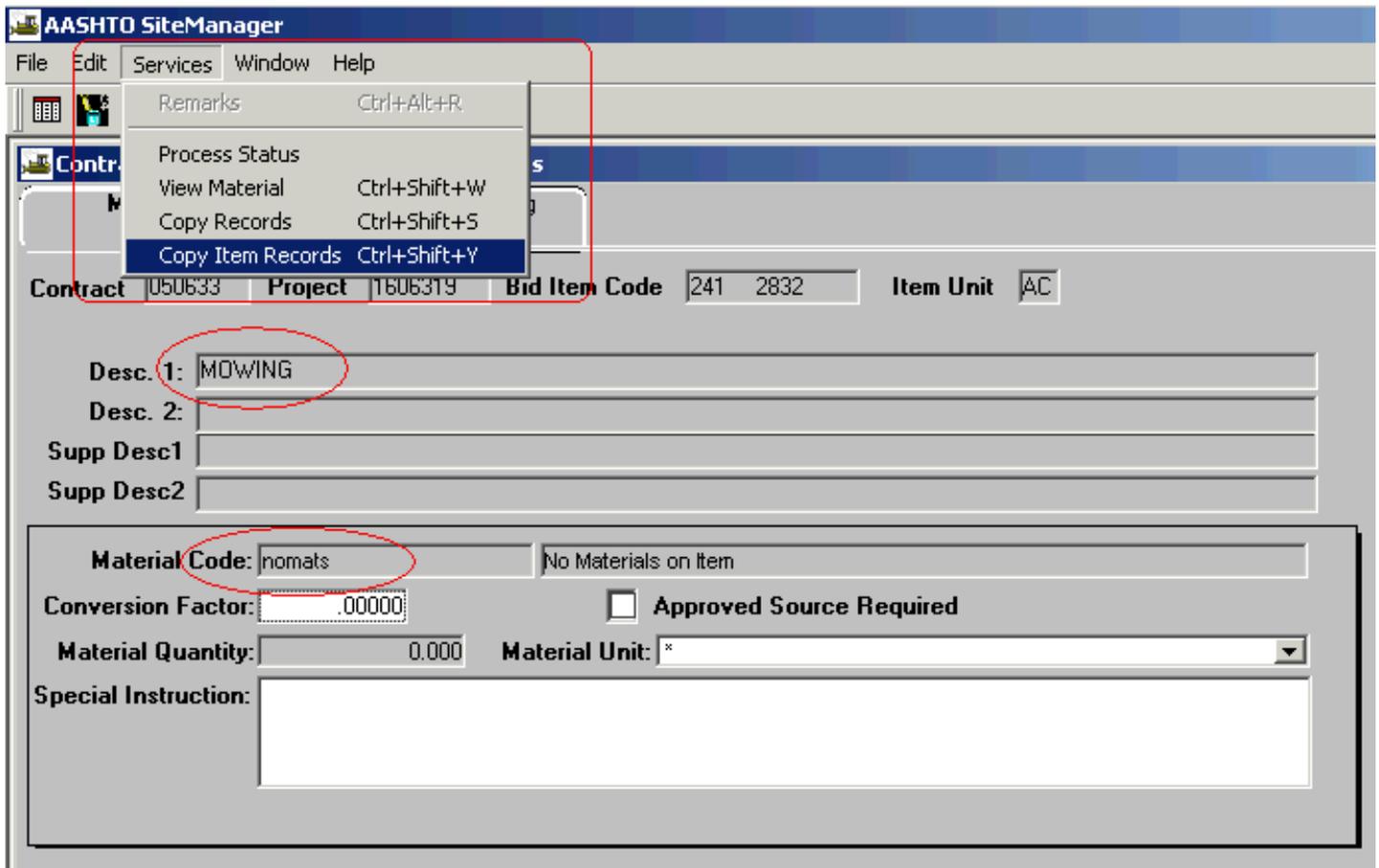
You have a concrete item that was on the outstanding item list (OIL) and now you want to add contract sampling and testing requirements to it.

1. Navigate to: Materials Management > Contract Materials (+) > Contract Sampling and Testing
2. Select your contract
3. Select an item with similar materials and S&T requirements. For example, if your concrete item on the OIL uses class AA concrete, try and pick another class AA concrete item that you want to copy from.
4. Choose one of the materials
5. From the Services Menu, select "Copy Item Records" (this copies all materials from one item to another).
6. Choose the item you need to copy to (the item that was on the OIL).
7. One of the materials will open, and you can revise the conversion factor (or most anything else). Be sure and navigate to the Sampling and testing tab and verify the settings are okay or revise as necessary.
8. Be sure and look at each material on the item that was copied. You may need to change settings on several of the materials.

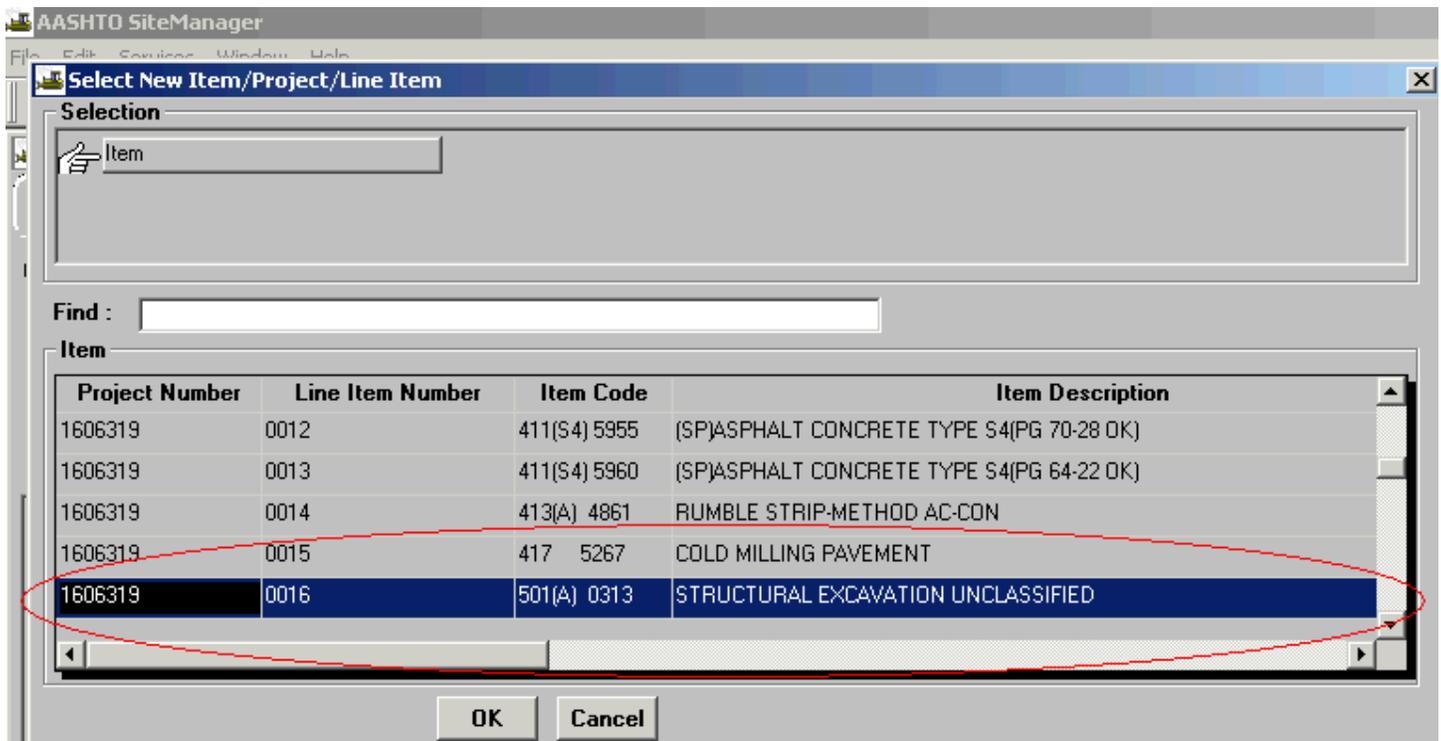
Example 2:

You have an item that was on the OIL, that you need to add one S&T requirement to, BUT, there are no similar items to copy from:

1. Navigate to: Materials Management > Contract Materials (+) > Contract Sampling and Testing
2. Select your contract
3. Select an item and choose the material (will probably not be the correct material - don't worry about that for now. It may be easiest to select and copy from an item with the **nomats** material code)
4. Go to Services > Copy Item Records (this copies all materials from one item to another) In the screen shot below I am copying **from** a Mowing item with the material code, "nomats":



- This opens a picklist of items on the contract, select the item you want to add S&T requirements to. In the screenshot below we are wanting to add a density test requirement to line item 16, "Structural excavation unclassified".



- Click OK, and the S&T requirements from "Mowing" is copied to "Structural Excavation Unclassified". In this case we copied the nomats material code (the conversion factor and frequency is set to zero for "nomats" by default).

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File Edit Services Window Help

Contract Sample and Testing Requirements

Materials Sample and Testing

Contract 050633 Project 1606319 Bid Item Code 501(A) 0313 Item Unit CY

Desc 1: STRUCTURAL EXCAVATION UNCLASSIFIED

Desc 2:

Supp Desc1

Supp Desc2

Material Code: nomats No Materials on Item

Conversion Factor: .00000 Approved Source Required

Material Quantity: 0.000 Material Unit: *

Special Instruction:

- I really want to add the material code, ewrk009 - "Earthwork Structural Excav and backfill" with the density test method to this item.
- Click the new icon. This allows a new material code to be added and a conversion factor. In the screenshot below, I have added the material code, ewrk009 with a conversion factor of 1. The material unit of CY comes in automatically from the default settings.

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Contract Sample and Testing Requirements

Materials Sample and Testing

Contract Project Bid Item Code Item Unit

Desc. 1:
Desc. 2:
Supp Desc1
Supp Desc2

Material Code: Earthwork, Structure Excav & Backfill
Conversion Factor: **Approved Source Required**
Material Quantity: **Material Unit:**
Special Instruction:

- Click save. Then navigate to the Sampling and Testing Tab. Because I copied from a "nomats" material, there are no sampling and testing requirements defined in the Sampling and testing tab. I will need to add: Sample Type, Acceptance Method, Test Method, Rate, Frequency and Sample Units as shown below:

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Contract Sample and Testing Requirements

Materials **Sample and Testing**

Contract: 050633 Project: 1606319 Bid Item Code: 501(A) 0313 Item Unit: CY
 Material: ewrk009 Material Desc.: Earthwork, Structure Excav & Backfill

Desc. 1: STRUCTURAL EXCAVATION UNCLASSIFIED
 Desc. 2:
 Supp Desc1:
 Supp Desc2:

Producer Supplier Code	Sample Type	Acceptance method	Test Method
	MAT Material	CRES Construction Residency	C95001

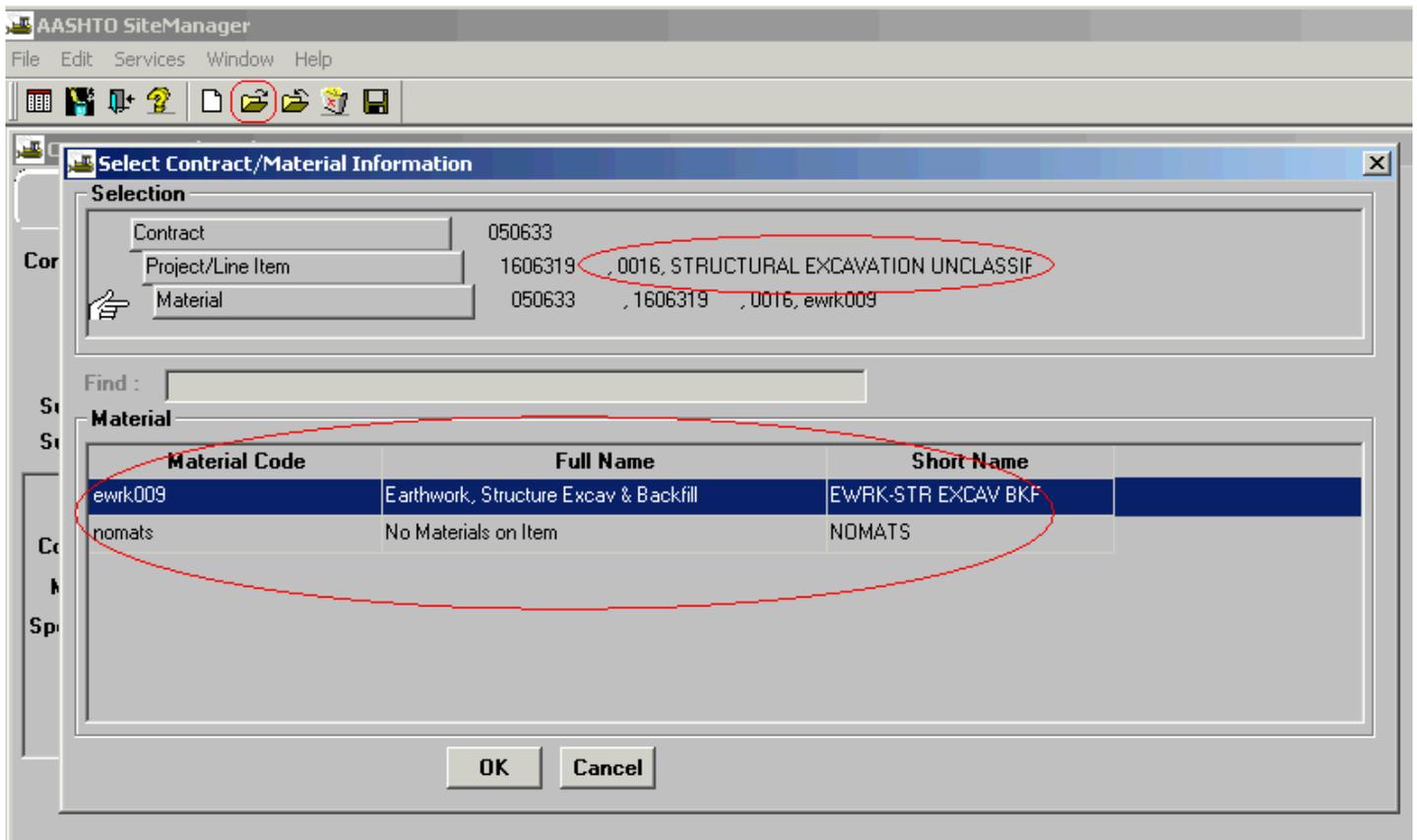
Producer Supplier Code:
 Sample Type: MAT Material
 Acceptance Method: CRES Construction Residency
 Test Method: C95001
 Density and Moisture Content of Soil (Agg.) by Nuke Meth.

Sample Location: N/A
 Sample Units: CU.YD.
 Sample Responsibility:
 Test Responsibility:

Rate: 1
 Frequency: Samples per.: 2,000,000
 Sample Size:

- You have successfully added a S&T requirement to an item that before, had no S&T's defined.

11. If you were to click back to the Materials Tab, then click the open icon, it would show two materials on the item. The nomats material has no sampling requirements and cannot be deleted.



Example 3:

You have a Pay Item for aggregate base. This pay item is not specific to a gradation or type, so the global setting was made using the most common Aggregate Base material, Type A (material code aggr001). This is what is shown on your sampling checklist. However, your project plan notes specify Type B (material code aggr002).

1. Navigate to: Materials Management > Contract Materials (+) > Contract Sampling and Testing
2. Select your contract and the appropriate Line item.
3. Select the material you want to change. In this case the aggr001 material code.
4. From the Services Menu, select "Copy Records" (this copies the S&T req from one material to a new material on the item).
5. A Material Code Pick List opens. Select the new Material. In this case, aggr002.

6. You have just added a new material requirement to your item including all of the S&T settings from your original material. Look at the conversion factor, and on the Sample and Test tab, make sure the test method, frequency, etc., are correct for your new material. If not, make adjustments.
7. Save  .
8. Click the open icon  to navigate back to your list of materials on the item.
9. Select the old material (aggr001) you are not going to use.
10. Change the conversion factor to zero. This eliminates the test requirement.
11. On your old material, add a brief comment in the remarks icon  such as: "4/26/07: Jason Baggett: Plan notes specify Type B aggr base."

Note: The previous version (4/27/2007) of this QRG is available in the archived QRG folder.

Revision Notes:

10/05/2006: Added instruction to run the sampling checklist process.

04/02/2007: Minor change to third bullet point at beginning of QRG, concerning fly ash example.

04/27/2007: Additional instruction added to the first bullet item defining how to add S&T requirements to an item on the OIL. Defined examples and what they cover at the beginning of the QRG. Add a third example showing how to change a material code. Add instructions to include remarks when changes to S&T requirements are made. Move instructions for running the sampling checklist process to an area above the examples. Minor formatting changes to text.

10/19/2010: Removed any instructions about deleting a material from an item. SiteManager revisions removed that functionality. Revisions made to Example two, steps 6 and 11. Steps 12 and 13 deleted.