

Quick Reference Guide

Last Modified: 03/06/2008 11:33:21 AM
Reviewed for Version: SiteManager 3.7

Small Quantity Material Acceptance Method

Documentation of small quantity acceptance is accomplished in SiteManager by changing the Sample Type in the Contract Sampling and Testing Window for a pay item. No sample records are required. A summary report can be printed for a contract showing all pay items, materials and quantities accepted by small quantity. Step by step instructions are provided below:

It is a requirement of the Material Certification Process to attach a summary report to the Material Certification Letter, listing all material accepted on a contract using this acceptance method. Instructions on how to access this report are included in this QRG, and further discussion is provided in the Policy and Procedure, 1302.1A - Small Quantities Acceptance Report.

This SiteManager Small Quantity Material Acceptance Method may be used when:

- There is a small quantity of material on a Contract - Project/Line Item, AND eliminating **all** default Sampling and Testing requirements on a **Material** on that item is warranted. The Resident Engineer makes this determination.

Do not use this method when you are actually conducting Sampling and Testing on a material. For Example:

1. Sampling at a Rate/Frequency of 1 per 500 Tons and you have 505 Total, and wish to avoid the requirement for the second test. In those types of cases, you may either:
 - Change only the Rate/Frequency to 1 per 510 (Eliminating the requirement for the second Test up front) or
 - In a properly completed Sample Information Record, post 510 to your Contract - Project/Line Item (Satisfying the requirement for the second Test by posting over-the-frequency quantity)
2. You have several test requirements (templates) on a material; such as an asphalt mix (TSR, T176, Mix, Cores). AND you do not need to do one of the tests, for example you only have 1400 TONS of HMA, so you do not need to perform the TSR test and a Residency may choose to waive the sand equivalent test (if the mix has a good history). In this case:

- Change the test rate to zero:  for the TSR test and possibly the T176 test.

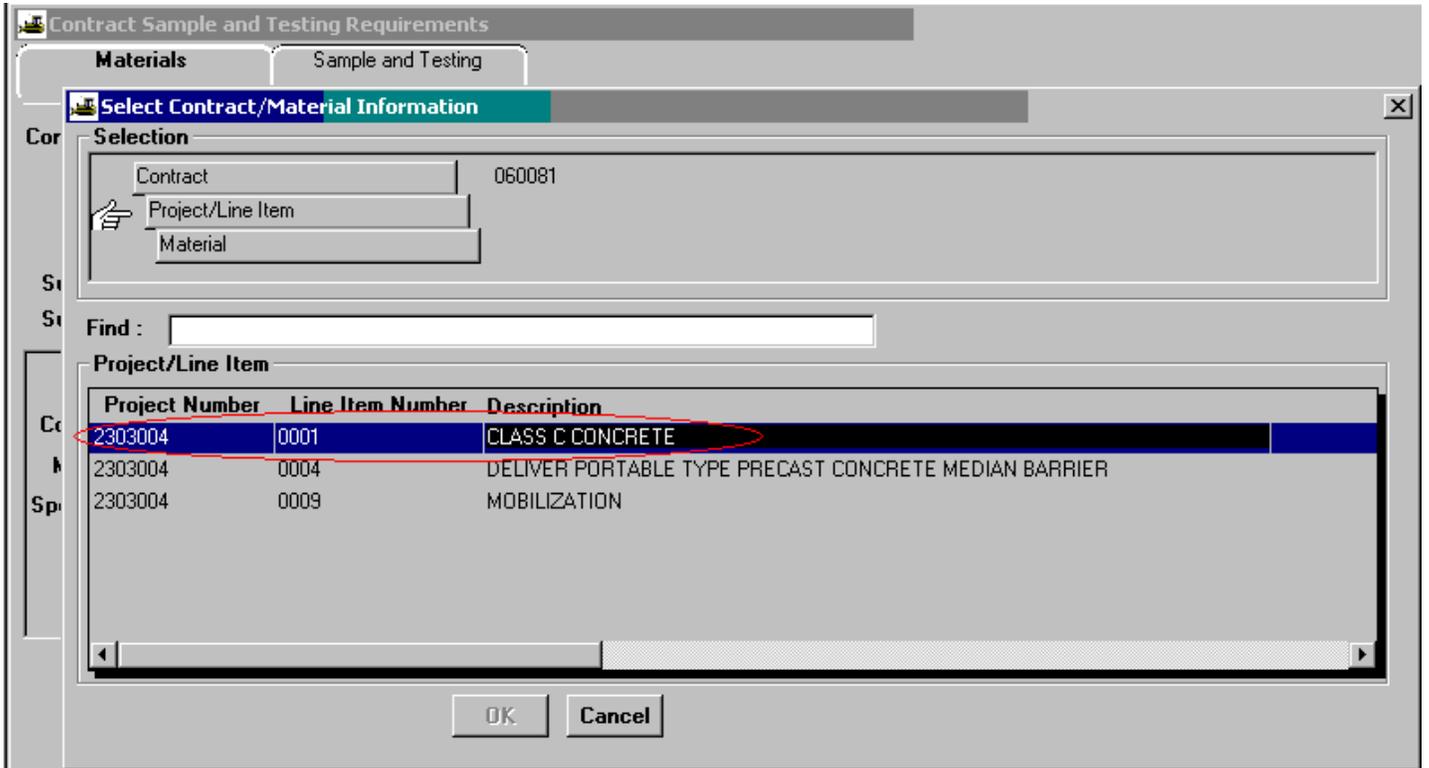
3. Do not use this method when you are actually conducting Sampling and Testing, have a failing sample, but wish to accept that failing Material. In those cases, change the Status of the properly completed Sample Information Record to 4c: Fail & Accepted.

To use this Small Quantity Material Acceptance Method you will need to change two settings in the Contract Sampling and Testing Requirements window for each test on your pay item:

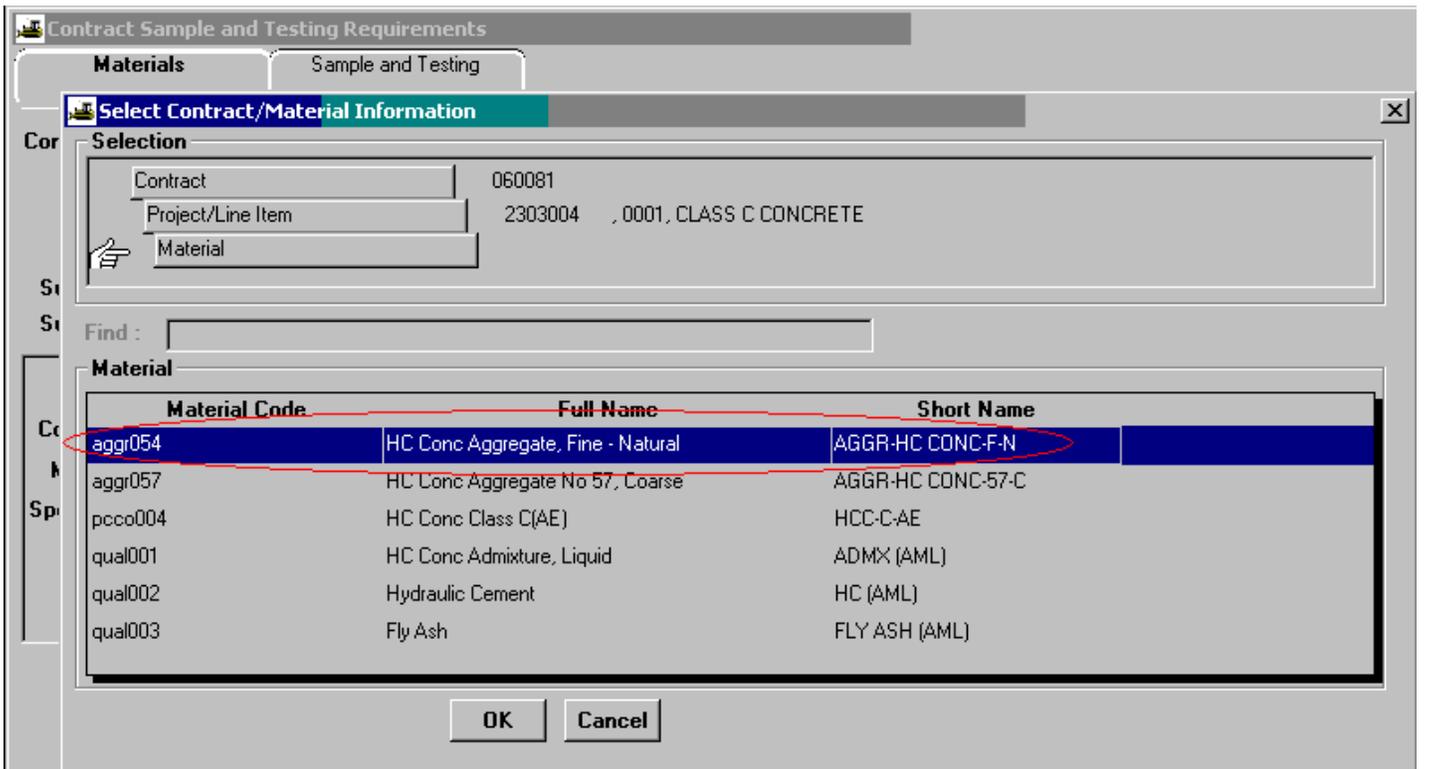
1. Change the Sample Type to "SMQ Small Quantity"
2. Change the Sample Rate to 0. (DO NOT change the conversion factor or frequency).
3. Run the built-in Sampling Checklist Process to update report data. For details on how to do that see Quick Reference Guide "Sampling Checklist".

The following screen shots illustrate step by step instructions, for navigating to the proper windows, making the necessary changes, and running the Small quantity report.

Step 1. Navigate to Contract Sampling and Testing Requirements, Select your Contract and Project/Line Item.



Step 2. Select the Material you wish to accept by the Small Quantity Material Acceptance Method.



Step 3. In the Materials window, verify the selected Material and verify the appropriate Conversion Factor is displayed.

DO NOT ZERO OUT THE CONVERSION FACTOR.

Contract Sample and Testing Requirements

Materials Sample and Testing

Contract: 060081 Project: 2303004 Bid Item Code: 509(D) 1331 Item Unit: CY

Desc. 1: CLASS C CONCRETE
Desc. 2:
Supp Desc1:
Supp Desc2:

Material Code: aggr054 HC Conc Aggregate, Fine - Natural

Conversion Factor: .66930 **Approved Source Required**

Material Quantity: 1.874 **Material Unit:** TON

Special Instruction:

Step 4. In the Sample and Testing window, highlight EACH TEST METHOD listed for the Material and:

- Change Sample Type to SMQ Small Quantity and
- Change Rate to 0 (zero)
- **DO NOT ZERO OUT THE FREQUENCY.**

Contract Sample and Testing Requirements

Materials | **Sample and Testing**

Contract: 060081 | Project: 2303004 | Bid Item Code: 509(D) 1331 | Item Unit: CY

Material: aggr054 | Material Desc.: HC Conc Aggregate, Fine - Natural

Desc. 1: CLASS C CONCRETE

Desc. 2:

Supp Desc1:

Supp Desc2:

Producer Supplier Code	Sample Type	Acceptance method	Test Method
	SMQ Small Quantity	CRES Construction Residency	T27

Producer Supplier Code: []

Sample Type: SMQ Small Quantity | **Acceptance Method:** CRES Construction Residency

Test Method: T27 | Sieve Analysis of Fine and Coarse Aggregates

Sample Location: N/A

Sample Units: TON

Sample Responsibility: Construction Residency

Test Responsibility: Construction Residency

Rate: 0

Frequency: Samples per.: 500,000 | Sample Size: 1 bag

Once the built-in Sampling Checklist Process has been ran, the custom report facility **Sampling Checklist** will now indicate a Sample Type of SMQ and Total Req'd for a Test will be 0 (zero), eliminating the cause of a Discrepancy for no Sampling/Testing. Do **not** create a Sample Information Record for these Materials.

Microsoft Access - [SAMPLING CHECK LIST]

File Window Help

Type a quest

Oklahoma DOT Sampling Check List - All Associations - Single Project Contract

Contract ID	Primary Project	Primary JPN	Primary Contractor								
060081	SAP -161N (167)	2303004	PBX CORPORATION								
Material Code	Material Full Name	Spec. Ref.	Material Unit	Bid + C.O.	Installed	Satisfied					
aggr054	HC Conc Aggregate, Fine - Natural	701.05	TON	1.874	0.000	0.000					
Project	Line	Item Cod	Item Description	Item Unit	Bid + C.O.	Installed	Conv. Factor				
2303004	0001	509(D) 1331	CLASS C CONCRETE	CY	2.8	0	0.6693	TON	1.874	0.000	0.000
Test Method	Test Description	Sample Type	Acceptance Method	Total Req'd	Current Req'd	Satisfied	Frequency				
T27	Sieve Analysis of Fine and Coarse Aggregates	SMQ	CRES	0	0	0	500				

There is a custom report, "**Small Quantities Acceptance Report**" where you can select your Contract and obtain a list of all Materials that were accepted using this Small Quantity Material Acceptance Method.

The **Small Quantities Acceptance Report** is available in SiteManager in the Main Panel > Accessories(+) > System Attachments. Select the Material Certification Process Utility Index for a link to this report.

Summary of changes:

3/7/2007: Added additional emphasis on what settings should be changed in order for the small quantity report to function correctly. No changes made to procedures.

5/11/2007: Deleted the screen shot of the Small Quantities Acceptance Report. Add language about where to locate the report in the Material Certification Process Utility Index in system attachments. Paragraph added about the use of this acceptance method in conjunction with the Material Certification Process.

5/30/2007: Added another example of when **not** to use the small quantity method. Specifically for materials with multiple test template requirements (HMA) and you are not performing all of the tests.

3/6/2007: Added step to run built-in Sampling Checklist Process to update report data. This will be necessary since Contract Sampling and Testing Requirements were modified.