# Managing Contract Materials and Acceptance Actions

Additional Quick Reference Guides, training documents, and the Construction and Materials User Guides are available from ODOT.

**Key to Action Buttons**

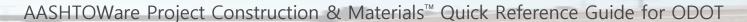| | |
|---|---|
| Actions ▼ | Global Actions menu (top of the screen) |
| ▼ | Component Actions menu (on headings) |
| ▼ | Row Actions menu (on rows) |

## Role(s): Central Lab Admin

## Managing Contract Materials and Acceptance Actions

To open the Contract Materials and Acceptance Actions Summary:

1. From the **Dashboard**, in the **Contract Progress Overview** component, search for and open the desired contract.
2. On the **Contract Progress Summary** component, click the **Contract Materials and Acceptance Actions** quick link.

To modify the Use Material Set flags for desired contract project item material sets:

1. On the **Contract Materials and Acceptance Actions Summary** component, on the **Materials** tab, review each contract project item material set.
2. For the desired contract project item material sets, in the **Use Material Set** column, select or clear the **Use Material Set** check box.
   - **Note:** Upon generating contract materials and acceptance actions, the selections made for the reference items were copied to the contract project items.
3. Click the **Save** button.

- o **Note:** Selecting the **Use Material Set** check box here affects what users see on the **Select Contract Project Items** modal window (available from the **Sample Record Summary** component's **Contract** tab after clicking the **Select Contract Project Items** button) when the **Recommended Material Sets** drop-down displays **True**.

To add a contract project item material set material:

1. On the **Contract Materials and Acceptance Actions Summary** component, on the **Materials** tab, search for and expand the desired contract project item material set.
2. On the **Contract Project Item Material Set** row **Actions** menu, in the **Tasks** section, click the **Add Material** task.
3. The system creates a New Contract Project Item Material Set Material row.
4. In the **Material** field, search for and select the desired material.
5. In the **Conversion Factor** field, type the desired conversion factor.
6. Click the **Save** button.
   - o **Note:** Adding a material to a contract project item material set does not affect the reference item material set.

To delete a contract project item material set material:

**Note**: Only Central Lab Admins should delete Material Set Materials.

1. On the **Contract Materials and Acceptance Actions Summary** component, on the **Materials** tab, search for and expand the desired contract project item material set.
2. On the row **Actions** menu for the **Contract Project Item Material Set Material** row, in the **Tasks** section, select the **Delete** task.

3. Click the **Save** button.

To create a contract project item material set:

**Note**: Only Central Lab Admins should create Material Sets.

1. On the **Contract Materials and Acceptance Actions Summary** component, click the **Items** quick link.
2. On the **Contract Items** component, click the **Contract Project Items** tab.
3. Search for and expand the desired contract project item.
4. On the project line number row **Actions** menu, in the **Tasks** section, click the **Create Material Set** task.
5. In the **Add Contract Project Item Material Set Material Summary** component, in the **Material Set** field, type the desired material set name.
6. Click the **Save** button.

To delete contract project item material set:

**Note**: Only Central Lab Admins should delete Material Sets.

1. On the **Contract Materials and Acceptance Actions Summary** component, on the **Materials** tab, search for and expand the desired contract project item material set.
2. On the row **Actions** menu, in the Tasks section, click the **Delete** task.
3. Click the **Save** button.

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To copy a material set to one or more contract project items:

**Note**: Only Central Lab Admins should copy Material Sets.

1. On the **Contract Materials and Acceptance Actions Summary** component, on the **Materials** tab, search for and expand the desired contract project item material set.
2. On the row **Actions** menu, in the **Tasks** section, click the **Copy Material Set** task.
3. In the **New Material Set Name** field, type a name for the material set.
4. Select one or more items.
5. Click **the Add to Contract Project Item** button.
6. Click the **Save** button.

## Regenerating Materials and Acceptance Actions (Central Lab Admin)

After materials and acceptance actions have been generated for a contract, you can regenerate them as needed. When you regenerate materials and acceptance actions, the system deletes the existing materials and acceptance actions associated with the contract. This includes any modifications made at the contract project level since the initial generation, including any material sets added to contract project items. The system then regenerates new materials and acceptance actions for the contract based on the materials and acceptance actions set up for the reference items that correspond to items on the contract.

# Managing Contract Materials and Acceptance Actions

To regenerate Materials and Acceptance Actions per contract:

1. On the **Dashboard**, in the **Contract Progress Overview** section, search for the desired contract.
2. On the row **Actions** menu, click **Regenerate Materials and Acceptance Actions**.

To regenerate Materials and Acceptance Actions per contract project item category or contract project item:

1. On the **Contract Items** component, click the **Contract Project Items tab**.
2. Search for the appropriate contract project item category or contract project item.
3. On the contract row **Actions** menu, click **Regenerate Materials and Acceptance Actions**.

To regenerate Materials and Acceptance Actions for more than one contract project item:

1. On the **Contract Items** component, from the component **Actions** menu, click the **Select Items to Regenerate** action.
2. In the **Select Items to Regenerate** modal, search for and select the desired contract project items.
3. Click the **Save** button.

## Updating Materials and Acceptance Actions (Central Lab Admin)

The following table describes how the Update Materials and Acceptance Actions command handles different types of changes to reference items:

| Reference Item | Contract Item |
|---|---|
| Reference item has new materials and material acceptance actions. | New data is copied to the corresponding contract item. |
| Reference item has modified materials and material acceptance actions. | Modified data is copied to the corresponding contract item, overwriting any changes made on the contract item. |
| Reference item has deleted materials and material acceptance actions. | No changes are made to the corresponding contract item. |
| Reference item has no changes to materials and material acceptance actions. | No changes are made to the corresponding contract item. |

# Managing Contract Materials and Acceptance Actions

For each contract item, the system checks the date that changes were last made to materials and acceptance actions for the corresponding reference item, and compares it with the date when materials and acceptance actions were last generated for the contract.

To update Materials and Acceptance Actions per contract:

1. On the **Dashboard**, in the **Contract Administration Overview** section, search for the desired contract.
2. On the row **Actions** menu, click the **Update Materials and Acceptance Actions** action.
   - **Note:** Alternatively, you can access them by the navigation: Contract Administration Summary > Component Actions menu > Update Materials and Acceptance Actions

To create a contract acceptance action:

1. On the **Contract Materials and Acceptance Actions Summary** component, on the **Acceptance Actions** tab, search for and expand the desired contract project item material set material.
2. On the row **Actions** menu for the **Contract Project Item Material Set Material** row, in the Tasks section, select the **Create Contract Acceptance Action** choice.
3. On **the Add Contract Acceptance Actions Summary** component, type a name.
4. In the **Effective Date** field, select the desired date.

# Managing Contract Materials and Acceptance Actions

5. In the **Expiration Date** field, select the desired date.

6. In the **Evaluation Method** drop-down, select the desired evaluation method.

7. The **Contract** field displays the contract ID and description.

8. The **Item** field displays the item code and description.

9. In the **Description** field, type the desired description.

10. In the **Status** field, select the desired status.

11. The **Active** field displays the currently saved status.

12. The **Project** field displays the project number.

13. The **Project Item Line Number** field displays the project item line number.

14. Click the **Save** button.

15. In the **Option Name** field, type the desired name.

16. In the **Option Description** field, type the desired description.

17. Click the **Save** button.

18. On the row **Actions** menu for the desired Option, select **the Select Action Relationship** choice.

19. In the **Select Action Relationship** modal, select the desired row(s).

20. Click the **Add to Option** button.

21. In the **Action Rate** field, type the desired action rate.

22. In the **Frequency Type** dropdown list, select the desired frequency type.

23. In the **Action Frequency** field, type the desired frequency.

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24. In the **Minimum Quantity Required** field, type the desired minimum quantity of the material required before the acceptance action must be performed.

25. Select the **Exclude from Pay Est** check box if you desire to track the estimate exceptions, but not cause item adjustments.

26. Click the **Save** button.