

## Quick Reference Guide (QRG)

AREA:	Materials	BRANCH:	Construction Programs Division
FUNCTION/TASK:	Outstanding Items	EFFECTIVE DATE:	10/07/2025
CREATED BY:	Aaron Cooper	VERSION:	1
		REVISED DATE:	

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### AUTHORIZATION

John Thomas – Branch Manager

### PURPOSE

How to create an Outstanding Item Sample Record.

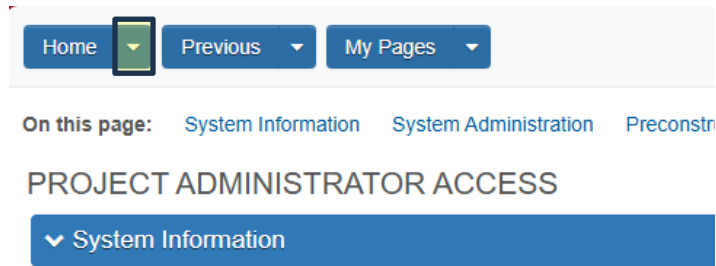
### SUMMARY

How to create an Outstanding Item Sample Record with the necessary roles: ***Residency Admin, Project Manager, Project Inspector, Field Lab Manager*** and ***Field Lab Technician***.

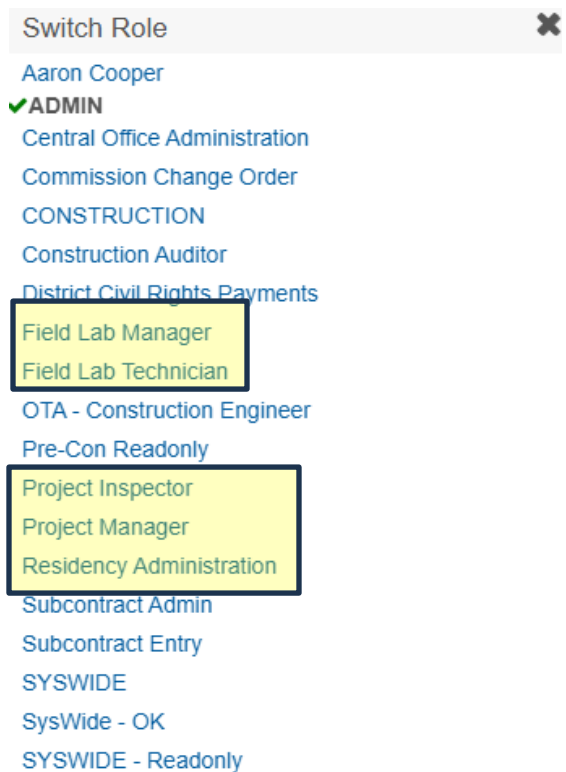
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# Part 1: Creating the Outstanding Item Sample Record

**Step 1:** On the AASHTOWare Project Home Screen, click the ***“Home Button Down Arrow”***.



**Step 2:** From the drop-down menu select the appropriate role from the list of Active Roles you have access too. Here is the list of Roles authorized to create an Outstanding Item Sample Record: ***“Residency Admin”, “Project Manager”, “Project Inspector”, “Field Lab Manager”, or “Field Lab Technician”***.



**NOTE:** Outstanding Items Sample Records will need to be completed by the time an Estimate pays for the items to avoid Exceptions, and not at the end of the project.

**NOTE:** The Final Outstanding Line Item List (FOIL) will not be available in AWP.

**Step 3:** After selecting the appropriate role, scroll to the *“Sample Record Overview”* component.

Construction

Change Order

Contract Administration

Contract Claims

Contract Permits

Contract Progress

Contract Specific Authorities

Contract Time

Contract Vendor Assets

Contractor Evaluation

Daily Diary

Daily Work Reports

Daily Work Reports by Contract

Meetings

Payment Estimate Accounting

Payment Estimate Approval Decisions

Payment Estimates

Sample Record Overview

Type search criteria or press Enter

System Default

Authorized Date

No Filter

Material Code

Begin typing to search or pr

Enter search criteria above to see results or Show first 10

**Step 4:** Under the **Sample Record** component, click the *“Component Action Menu”* arrow.

Sample Record Overview

Save

Type search criteria or press Enter

System Default

Showing 10 of 6720

Authorized Date

No Filter

Material Code

Begin typing to search or pr

0 marked for deletion

0 changed

Expand All

**Step 5:** From the **Component Action Menu** click *“Add”*.

Actions

Add

**Step 6:** In the **Sample Date** field, enter the needed ***“Sample Date”***.

[Overview](#)

Add Sample Record

There are unsaved changes.

▼ Add Sample Record

General

Facilities

Sample Date \*

10/07/2025

Material Code - Name \*

Begin typing to search or press Enter

Sampler ID - Name

Begin typing to search or press Enter

**Step 7:** In the **Material Code – Name** field, enter ***“OutstandItem”***.

[Overview](#)

Add Sample Record

There are unsaved changes.

▼ Add Sample Record

General

Facilities

Sample Date \*

10/07/2025

Material Code - Name \*

OutstandItem

Outstanding Item

Sampler ID - Name

Begin typing to search or press Enter

**Step 8:** Click the ***“Facilities”*** tab on the left side of the screen.

[Overview](#)

Add Sample Record

▼ Add Sample Record

General

Facilities

Sample Date \*

10/07/2025

Material Code - Name \*

OutstandItem

Outstanding Item

Sampler ID - Name

Begin typing to search or press Enter

**Step 9:** On the **Facilities** tab, click the **“Select Primary Facility”** button

[Overview](#)

Add Sample Record

▼ Add Sample Record

General

Facilities

▼ Primary Source/Facility

Select Primary Facility...

Facility ID - Facility Name

-

Facility Type

Brand Name

**Step 10:** From the **Select Primary Facility** table, click **“Show First 10”**.

Select Primary Facility

Advanced

Enter search criteria above to see results

or

Show first 10

**Step 11:** Select the only **Facility ID – Name** present. The **“outstd – Outstanding Item”**.

Select Primary Facility

Advanced

Showing 1 of 1

1 selected

Select	Facility ID - Name	Facility Type	Facility City	Location Description
<input checked="" type="checkbox"/>	outstd - Outstanding Item			

Add to Sample Record

**NOTE:** Notice the Green Check Mark indicating the Facility ID was selected.

**Step 12:** Click the **“Add to Sample Record”** button on the bottom right corner of the **Select Primary Facility** table.

Select Primary Facility

Advanced

Showing 1 of 1

1 selected

Select	Facility ID - Name	Facility Type	Facility City	Location Description
<input checked="" type="checkbox"/>	outstd - Outstanding Item			

Add to Sample Record

**Step 13:** Click the **“Save”** button on the top right corner.

There are unsaved changes.

Save

▼ Primary Source/Facility

Select Primary Facility...

Facility ID - Facility Name

Facility City

outstd - Outstanding Item

Facility Type

Facility Location Description

Brand Name

SMFMI Name

Q Begin typing to search or press Enter

Q Begin typing to search or press Enter

**Step 14:** Once saved and now on the new **Sample Record Summary** page, make note of the Auto-Generated **Sample ID** name. When ready to continue, click the **“Sample Type”** fields drop-down arrow.

Sample Status

Pending

Sample Type

Acceptance Method

Mix Design Type

Mix Design ID

Q Begin typing to search or press Enter

Lab Control Number

Q CNCooperAW20251007101250

**Step 15:** From the **Sample Type** drop-down menu, select **“DOC – Document”**.

Sample Type

QNT - Density

DOC - Document

MAT - Material

Q1 - Q1 Qualification

QM - QM Quality Monitoring

SI - Shop Inspected

WVD - Waived

XIA - XIA IA Information Only


XIB - XIB IA Split


XIC - XIC IA Comparison

**Step 16:** Click the **“Acceptance Method”** field drop-down arrow.

Sample Status  
Pending

Sample Type  
DOC - Document


Acceptance Method  


Mix Design Type  


Mix Design ID



Lab Control Number

**Step 17:** From the **Acceptance Method** drop-down menu, select **“CRES – CRES Construction Residency”**.

Acceptance Method  


- BPI - Bridge Division
- CRES - CRES Construction Residency**
- MAT - MAT Materials Division
- SHP1 - Shop Approved
- SHP2 - Shop Approved by 105.03
- SHP3 - Shop Rejected
- TRA - Traffic Division

**Step 18:** Click the **“Save”** button on the top right corner.


 Save 

ions tab.

Sample Status  
Pending

Sample Type  
DOC - Document

Acceptance Method  
CRES - CRES Construction Residency

Mix Design Type  


Mix Design ID

Lab Control Number

**Step 19:** From the left side of the screen, click the **“Contract”** tab.

Sample Record Summary

▼ Sample Record: CooperAW20251007101250

General

Sample Location

Sources/Facilities

Contract

Associations

Tests

Additional Information

Sample Record: Test(s) may not be assigned to Sample Records without a Destination Lab association on the Asso

Sample ID

CooperAW20251007101250

Material Code - Name \*

Q

OutstandItem

Outstanding Item

Sample Date \*

10/07/2025

Sampler ID - Name

Q

Begin typing to search or press Enter

Lot/SubLot

**Step 20:** From the **Contract** tab, click the **“Select Contract Project Items”** button.

[Overview](#)   [Find Sample](#)   [Receive at Lab Unit](#)   [Review Samples](#)   [Review Tests](#)

Sample Record Summary

▼ Sample Record: CooperAW20251007101250

General

Sample Location

Sources/Facilities

Contract

Associations

Tests

Additional Information

Sample Record: Test(s) may not be assigned to Sample Records w

Select Contract Project Items...

No rows found matching criteria.

**NOTE:** When selecting the Contract Project Items, note that these Items will show on the Outstanding Item Test’s corresponding Agency View.



**Step 21:** Select the needed **Outstanding Item Project Items** from the needed contract.

Select Contract Project Items

Advanced
Showing 3 of 3

Recommended Material Sets  
True

Select: All None

Select	Material Set	Contract	Contract Item
✓	Outstanding Item	180270-T1	0770
✓	Outstanding Item	180270-T1	0780
✓	Outstanding Item	180270-T1	0790

**NOTE:** Select one or more items that you have the proper documentation for.

**Step 22:** Once the needed **Outstanding Item Project Items** are selected, click the **“Save”** button.

Select Contract Project Items

Advanced
Showing 3 of 3

Recommended Material Sets  
True

Select: All None

Select	Material Set	Contract	Contract Item	Project	Project Item
✓	Outstanding Item	180270-T1	0770	2475204-T1	0770 - TRAFFIC STRIPE(MULTI-POLY)(4" WIDE)
✓	Outstanding Item	180270-T1	0780	2475204-T1	0780 - CONSTRUCTION TRAFFIC STR(PAINT)(4" WIDE)
✓	Outstanding Item	180270-T1	0790	2475204-T1	0790 - REMOVABLE PAVEMENT MARKING TAPE(4" WIDE)

Save

**Step 23:** Still on the **Contract** tab, enter the **“Sample Matl Qty/Frequency”** on each **Contract Item (Project Item)**.

Select Contract Project Items...

180270-T1 - 0790(0790) - 857(C)9400 - REMOVABLE PAVEMENT MAR Outstanding Item	912.00000	0.00000	912.000	
180270-T1 - 0780(0780) - 857(A)9200 - CONSTRUCTION TRAFFIC S Outstanding Item	4,379.00000	0.00000	4,379.000	
Contract Item(Project Item) Description 180270-T1 - 0770(0770) - 856(A)8200 - TRAFFIC STRIPE(MULTI-P Material Set Outstanding Item	4,608.00000	0.00000	4,608.000	

Step 24: Click the “Save” button.

Save

in on the Associations tab.

0 marked for deletion | 3 changed

912.00000	0.00000	912.000	0.000	
4,379.00000	0.00000	4,379.000	0.000	
Sample Matl Qty/Frequency	Total Satisfied Matl Qty	Current Item Qty	Posted Item Qty	
4,608.00000	0.00000	4,608.000	0.000	

Step 25: Click the “Associations” tab on the left side screen

Sample Record Summary

Save Complete

Sample Record: CooperAW20251007101250

General

Sample Location

Sources/Facilities

Contract

Associations

Tests

Additional Information

Sample Record: Test(s) may not be as

Select Contract Project Items...

180270-T1 - 0790(0790) - 857(C)940

Outstanding Item

180270-T1 - 0780(0780) - 857(A)920

Outstanding Item

Contract Item(Project Item) Descrip

180270-T1 - 0770(0770) - 856(A)820

Material Set

Outstanding Item

**Step 26:** Click the **“Association Type”** drop-down arrow.

Sample Record Summary Save Complete

▼ Sample Record: CooperAW20251007101250

General

Sample Location

Sources/Facilities

Contract

Associations

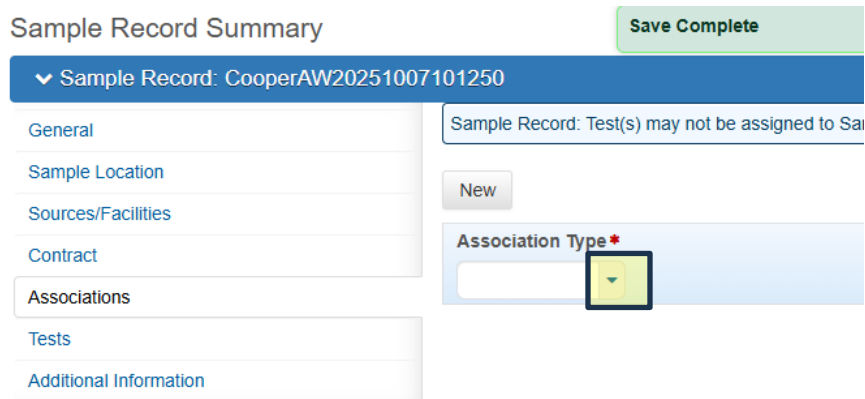
Tests

Additional Information

Sample Record: Test(s) may not be assigned to Sa

New

Association Type \*



**Step 27:** From the **Association Type** drop-down menu, select **“Destination Lab”**.

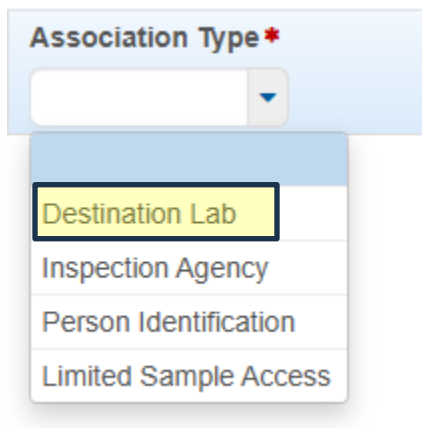
Association Type \*

Destination Lab

Inspection Agency

Person Identification

Limited Sample Access



**Step 28:** In the **Association Value** field, enter your needed **“Destination Lab”**.

New

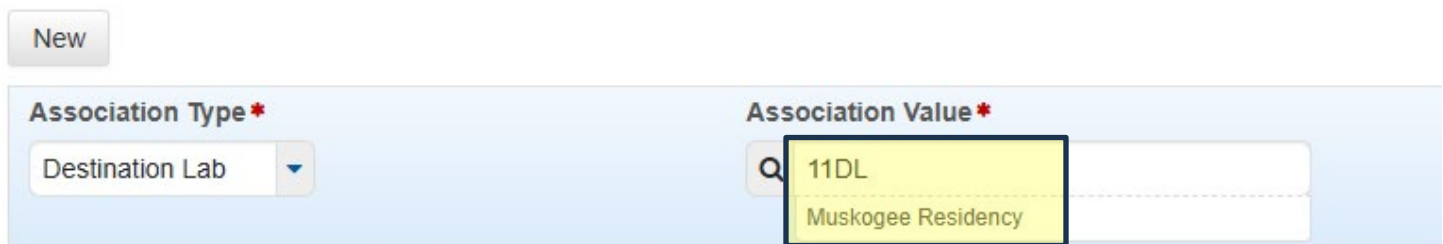
Association Type \*

Destination Lab

Association Value \*

11DL

Muskogee Residency



Step 29: Click the “Save” button.

Save

?

1 added | 0 marked for deletion | 0 changed

Step 30: Click the “Tests” tab.

Sample Record Summary

▼ Sample Record: CooperAW202510071012

General

Sample Location

Sources/Facilities

Contract

Associations

Tests

Additional Information

N

A:

C

Step 31: On the Tests tab, click the “Assign Tests” button.

Material

OutstandItem - Outstanding Item

Sample ID

CooperAW20251007101250

Assign Tests

No rows found matching criteria.

**Step 32:** On the **Assign Sample Record Test** screen, select your needed **“Test Method”**.

1

Select Default/Optional Test:

Selected Default Tests

Q

Type search criteria or press Enter

Advanced

Showing 1 of 1

Select:

All

None

Select	Test Method	Test Description
<input checked="" type="checkbox"/>	OutstandItem	Outstanding Item

Selected Optional Tests

**Step 33:** Click the **“Next Arrow”** on the bottom right corner of the screen.

1 selected

0 selected

←

→

**Step 34:** On the next screen click the **“Confirm”** button.

0 changed

Test Runs

1

0 changed

Confirm

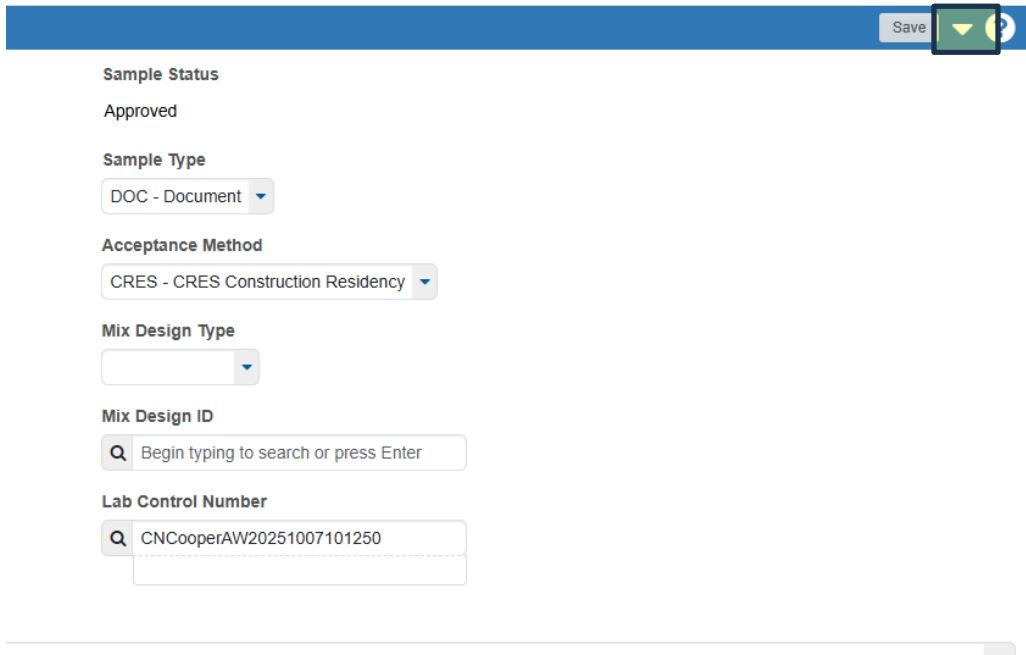
←

→

## Part 2: Adding Attachments

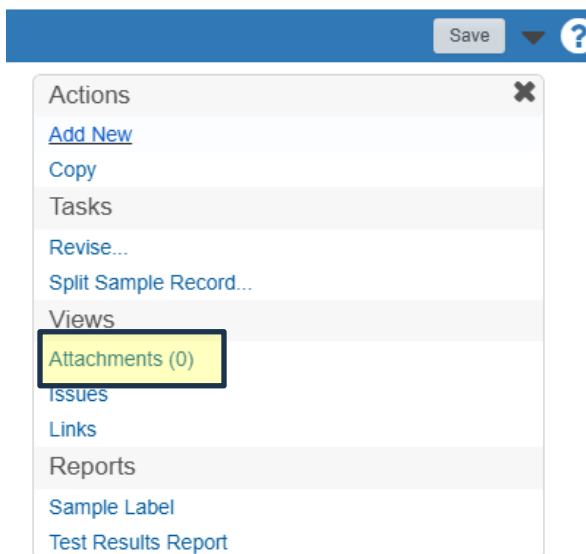
**Note:** When adding attachments, there are two locations where attachments can be added: **Within the Component Action Menu** on the Sample Record Summary page and on the **Sample Record Test** on the Test Tab. However, it is recommended to attach the documents on the **Component Action Menu** for accessibility reasons.

**Step 1:** Back on the **Sample Record Summary** page, click the **“Component Action Menu”** arrow.



The screenshot shows the top of the 'Sample Record Summary' page. At the top right, there is a blue bar containing a 'Save' button, a green downward arrow (the Component Action Menu), and a question mark icon. Below this bar, the form fields are visible: 'Sample Status' (Approved), 'Sample Type' (DOC - Document), 'Acceptance Method' (CRES - CRES Construction Residency), 'Mix Design Type' (empty), 'Mix Design ID' (search bar with placeholder 'Begin typing to search or press Enter'), and 'Lab Control Number' (CNC CooperAW20251007101250). The green downward arrow is highlighted with a black box.

**Step 2:** From the **Component Action Menu** drop-down menu, select **“Attachments”**



The screenshot shows the 'Component Action Menu' drop-down menu open. The menu is titled 'Actions' and contains the following items: 'Add New', 'Copy', 'Tasks', 'Revise...', 'Split Sample Record...', 'Views', 'Attachments (0)', 'Issues', 'Links', 'Reports', 'Sample Label', and 'Test Results Report'. The 'Attachments (0)' item is highlighted with a black box.

Step 3: Click the “Select File” button.

Attachments Overview

▼ Attachments For Sample Record

🔍 Type search criteria or press Enter [Advanced](#)

Select File...

No rows found matching criteria.

▼ Adobe Sign Documents

Step 4: Select the needed “Documentation” to attach.

Name	Status	Date modified	Type	Size
Change Order Class.pdf	✔	7/18/2025 11:25 AM	Adobe Acrobat D...	91 KB
Document.docx	✔	10/30/2024 1:31 PM	Microsoft Word D...	106 KB
Final Packet.pdf	✔	9/15/2025 10:51 AM	Adobe Acrobat D...	70 KB
Final Process 1.pdf	✔	9/15/2025 10:51 AM	Adobe Acrobat D...	43 KB
Inspection Training Handout (3).pdf	✔	9/26/2025 12:48 PM	Adobe Acrobat D...	424 KB
Materials Training Section 1.pdf	✔	9/26/2025 10:44 AM	Adobe Acrobat D...	1,903 KB
Materials Training Section 2.pdf	✔	9/26/2025 10:44 AM	Adobe Acrobat D...	4,949 KB
Name Cards TRN 2.docx	✔	9/26/2025 12:34 PM	Microsoft Word D...	26 KB

ame:

All Files (\*.\*)

OpenCancel

Step 5: Leave a Description if needed and click the “Save” button.

Save ?

0 marked for deletion | 0 changed | [Expand All](#)

0 changed

ription

Created Dt

# Part 3: Filling Out the Outstanding Item Agency View

**Step 1:** Still on the **Test** tab, click the **“Row Action Arrow”**.

CooperAW20251007101250

Logged

Assign Tests

0 marked for deletion0 changed

Test #	Test Result	Test Status	Destination Lab	Lab Unit	MAA	Default
1.0		9 - Test in Queue - Autofinalizable	Muskogee Residency	Muskogee Residency	Yes	Yes
Test Method		Test Description		Received at Lab Unit	Actual Completion	Test Last Updated
OutstandItem		Outstanding Item				10/07/2025 11:09:26 AM

**Step 2:** From the drop-down menu, select the **“\*Outstanding Item Agency View”**.

Default

Actions

Delete

Open

Tasks

Add Test Run

Views

\*Outstanding Item

Attachments (0)

Links

Tracked Issues

**Step 3:** On the **Agency View**, start by selecting the appropriate radio button (**Yes** or **No**) for the question **“Do you have the proper Documentation?”**.

Agency View Summary

Outstanding Item

Sample ID

CooperAW20251007101250

Test Results

Do you have the proper Documentation?

Yes

No

**NOTE:** As stated above, you will see here the earlier Contract Project Items you selected on the corresponding Agency View.



**Step 4:** On the **Project Line Number** rows, click the **“Doc ?”** checkboxes for each **Project Line Number** that has the appropriate documentation. On the Rows you must also document in the **Remarks** where each document was saved/stored.

Do you have the proper Documentation?

☒ Yes ☐ No

0770	TRAFFIC STRIPE(MULTI-POLY)(4" WIDE)	<input checked="" type="checkbox"/>	Document stored in Project File
0780	CONSTRUCTION TRAFFIC STR.(PAINT)(4" WIDE)	<input checked="" type="checkbox"/>	See attachment on the Sample Record
Project Line Number	Item Name	Doc ?	Remarks
0790	REMOVABLE PAVEMENT MARKING TAPE(4" WIDE)	<input checked="" type="checkbox"/>	See attachment on the Sample Record

**Step 5:** Click the **“Save”** button on the top right corner.

PrintSave?

Test Number  
1.0  
Actual Completion Date

0 marked for deletion | 3 changed

☒Document stored in Project File

☒See attachment on the Sample Record

Doc ?Remarks

☒See attachment on the Sample Record

**Step 6:** Once saved and still on the **Agency View**, enter **“Pass or Fail”** in the **Test Results** field and click the **“Save”** button again.

Sample Record Test

Agency View Summary

There are unsaved changes.

PrintSave?

Sample ID  
CooperAW20251007101250  
Test Results  
Pass

Test Number  
1.0  
Actual Completion Date

Do you have the proper Documentation?  
☒ Yes ☐ No

0 marked for deletion | 0 changed

0770	TRAFFIC STRIPE(MULTI-POLY)(4" WIDE)	<input checked="" type="checkbox"/>	Document stored in Project File
0780	CONSTRUCTION TRAFFIC STR.(PAINT)(4" WIDE)	<input checked="" type="checkbox"/>	See attachment on the Sample Record