Contract Materials and Acceptance Actions

Role(s):

SysWide (Admin)	KYTC_Construction Admin
KYTC_Central Office Construction (View Only)	KYTC_Section Office Supervisor
KYTC_Section Office Manager (View Only)	KYTC_FHWA (View Only)
KYTC_Inspector (View Only)	KYTC_Construction Read-Only User (View Only)
KYTC_Auditor (View Only)	KYTC_Chief District Engineer
KYTC_State Highway Engineer	KYTC_Deputy State Highway Engineer
KYTC_Materials Read-Only User (View Only)	KYTC_Materials Central Office User
KYTC_Materials Central Office Manager	KYTC_Materials District Office User (View Only)
KYTC_Materials District Office Manager	KYTC_Materials Admin
KYTC_District PD&PTEBM (View Only)	

Background:

- The Contract Materials and Acceptance Actions Feature describes the functions users can perform to manage testing requirements for a specific contract project item. This includes modifying contract item material conversion factors as well as managing Acceptance Actions for contract bid items.



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Contract Materials and Acceptance Actions

Modifying the Conversion Factor

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Central Office Construction (View Only), KYTC_Section Office Supervisor, KYTC_Section Office Manager (View Ony), KYTC_FHWA (View Only), KYTC_Inspector (View Only), KYTC_Construction Read-Only User (View Only), KYTC_Auditor (View Only), KYTC_State Highway Engineer (View Only), KYTC_Deputy State Highway Engineer (View Only), KYTC_Materials Read-Only User (View Only), KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_ Materials District Office User (View Only), KYTC_Materials District Office Manager, KYTC_Materials Admin, and KYTC_District PD&PTEBM (View Only)
- **Note:** The Contract Project must have the Material attached to it.

Navigation: AASHTOWare Project Dashboard > Contract Administration > Contract Administration Overview > Contract ID > Contract Administration Summary > Contract Materials and Acceptance Actions quick link

1. From the Contract Materials and Acceptance Actions Summary on the **Materials** tab, expand the material to modify the conversion factor.
2. In the **Conversion Factor** field, modify the conversion factor to 0 or 1.
   - **Note:** When the value for the **Conversion Factor** is 1, it means performing a sample test and other acceptance actions for that material are required.
   - **Note:** When the value for the conversion factor is 0, it means performing a sample test and other acceptance actions for that material are not required, usually because it was not included in the item posting.
3. Click the **Save** button.
   - **Note:** This should be reviewed for Materials at the beginning of a contract and when new materials are added so that the correct requirements are calculated for the contract.

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Contract Materials and Acceptance Actions

Updating Contract Materials and Acceptance Actions

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Section Office Supervisor, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** The Contract must have already had the initial Generate Materials and Acceptance Actions task completed. Otherwise, the system will not display the option for the user to update.
- **Note:** The user should **NOT** use the regenerate option as this will re-add any deleted AAs and reset any previously modified conversion factors.
- Note: Update action will generally **NOT** be needed as new contract items have CMAA's added automatically on change order approval.

Navigation: AASHTOWare Project Dashboard > Contract Administration > Contract Administration Overview

1. From the Contract Administration Overview, click on the row **Actions** menu for the contract.
2. Click the **Update Materials and Acceptance Actions** task.
   - **Note:** Once complete, the system will display the "Update Materials and Acceptance Actions Complete" message.
3. Click the **Contract ID** link.
4. Click the **Contract Materials and Acceptance Actions** quick link.
5. If any reference items have changes, the following behavior will be observed by the user:
   i. If the Reference Item has a new material and/or new acceptance action, then the new data is copied to the corresponding contract item.
      a. Click the **Acceptance Actions** tab to review the new acceptance actions.
         - **Note:** Please see the Manage Contract Acceptance Actions Instruction Guide to modify Acceptance Actions that may have been added to the Material.
      b. Click the **Materials** tab to review the new materials.
   ii. If the Reference Item has a modified material and/or acceptance action, then the modified data is copied to the contract item.

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a. Click on the **Acceptance Actions** tab to review the modified acceptance actions.

b. Click the **Expand** arrow for each project row.

c. Click on the **Materials** tab to review the modified materials.

iii. If the Reference Item has materials or acceptance actions that have been deleted, then no changes are made to the contract.

- **Note:** Please see the Manage Contract Acceptance Actions Instruction Guide to modify Acceptance Actions that may need to be removed from the Material.
- **Note:** See the section Modify the Conversion Factor exercise to modify the conversion factor to '0' for any materials that were deleted from the item but cannot be removed from the contract.

iv. If no changes are made to the Reference Item's Materials or Acceptance Actions, when the Update Contract Materials and Acceptance Actions option is selected, then the system will make no changes to the contract item.

- **Note:** Payment Estimate Exceptions should be recalculated for any Payment Estimates in Draft status when an update is made to the Contract Materials and Acceptance Actions. See the Manage Exceptions on a Draft Payment Estimate Instruction Guide.

Removing Acceptance Actions from Contract

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Section Office Supervisor, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, and KYTC_Materials Admin
- **Note:** The Contract must have had the initial Generate Contract Materials and Acceptance Actions completed.

Navigation: AASHTOWare Project Dashboard > Contract Administration > Contract Administration Overview > Contract ID > Contract Administration Summary

1. From the Contract Administration Summary, click on the **Contract Materials and Acceptance Actions** quick link.
2. Click the **Acceptance Actions** tab.

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3. In the **Quick Find** search box, search for the project, item, or material to remove.
   - **Note:** You can also use the Item Source dropdown to filter for items that originated from the original proposal or a change order, or use the Advanced link within the current filter dropdown to apply additional filters, sort, or save your settings.
4. Click the **Expand** arrow on a Project row to view all acceptance actions for the contract project item material.
5. Click the row **Actions** menu for the acceptance action to be removed.
6. Click the **Delete** task.
7. Click the **Save** button.
   - **Note:** The system will display a "Save Complete" message.
   - **Note:** The system will no longer expect the rate/frequency from the deleted Acceptance Action if the material remains on the contract. However, Payment Estimate Exceptions should be recalculated for any Payment Estimates in Draft status when an update is made to the Contract Materials and Acceptance Actions. See the Manage Exception on a Draft Payment Estimate exercise.

Modifying Acceptance Actions from Contract

- Only the following role(s) can complete this section: SysWide (Admin), KYTC_Construction Admin, KYTC_Materials Central Office User, KYTC_Materials Central Office Manager, KYTC_Materials District Office Manager, KYTC_Materials Admin
- **Note:** The Contract must have had the initial Generate Contract Materials and Acceptance Actions completed.

Navigation: AASHTOWare Project Dashboard > Contract Administration > Contract Administration Overview > Contract ID > Contract Administration Summary

1. From the Contract Administration Summary, click on the **Contract Materials and Acceptance Actions** quick link.
2. Click the **Acceptance Actions** tab.

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Contract Materials and Acceptance Actions

3. Click the **Expand** arrow on a project row to view all acceptance actions for the contract project item material.
4. Click the row **Actions** menu for the acceptance action to be modified.
5. Click the **Open** action.
6. Review the Contract Acceptance Actions Summar and modify the fields as needed.
7. The **Name** field indicates the name for an acceptance action.
8. The **Description** field indicates a brief description describing the acceptance actions.
9. The **Evaluation Method** drop-down arrow indicates whether the acceptance action will be evaluated by quantity, record count, or both, when determining whether acceptance actions have been satisfied for a contract project item's material.
10. The **Option Name** field indicates the name for an option group in an acceptance action.
11. The **Option Description** field indicates a brief description for an option group.
12. The **Action Rate** indicates how many acceptance records are required.
13. The **Frequency Type** indicates the type of frequency unit for an acceptance action.
14. The **Action Frequency** indicates how often an action occurs.
    - **Note:** If modifying from 1/CONT to 1/50000, you would change the **Name** from AA_SR_10293_AGSIEVE_PACP_TR_1/CONT to AA_SR_10293_AGSIEVE_PACP_TR_1/50000.
    - **Note:** You would also modify the rate and frequency at the end of the Acceptance Action **Description** and **Option Name**. The **Action Rate** would remain 1, the **Action Frequency** would be modified to 50000, the **Frequency Type** would be changed to Quantity.
    - **Note:** If change to a number per Contract, the **Action Frequency** would be 1 and the **Frequency Type** would be Contract. Otherwise, if the **Action Frequency** is not for a contract, the **Frequency Type** should be Quantity.
15. If the Contract Acceptance Action is modified, click the **Save** button.

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