KENTUCKY TRANSPORTATION CABINET

Kentucky TRNS*PORT Information Series

SiteManager Materials Module

Contract Sampling and Testing Window

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Contract Sampling and Testing Window Description

Sampling and testing requirements for an active contract with generated materials may be added, deleted or modified throughout the life of the contract on the Contract Sampling and Testing window.

Procedure

After materials are generated or after a change order is approved, the DME is responsible for making all contract specific modifications to the sampling and testing requirements. Modifications may be necessary based on proposal specifications, project plans or the addition or modification to a contract item via a change order. The DME may add or delete any materials necessary to fulfill the sampling and testing requirements for the items on the contract.

All possible sampling and testing requirements will be listed. The most common requirement will have a Sample Rate value of '1'. All other requirements will have a value of '0'. The DME will modify the Rate to reflect the correct requirement for the contract (e.g. change the most common requirement Rate to '0', and then modify the correct requirement for the contract to a Rate of '1').

- For Example, if a material is accepted by Small Quantities, the requirement Rate would be '1' for that requirement, and the 'most common' requirement Rate would be changed to '0'.

After adding new materials to the item, the DME will contact the Materials System Administrator to have the Contract Sampling and Testing requirements set up. When defining new sampling and testing requirements, the DME will consult the Sampling Manual for guidelines or, in the case of a new item, coordinate with the Materials Administrator.

After the DME has completed the Contract Sampling and Testing Requirement revisions, the DME will contact the Central Office IAS Liaison. The Central Office IAS Liaison will determine if IAS requirements apply to the contract. If they do apply, then the IAS Liaison will update the Contract Sampling and Testing Requirements to reflect IAS requirements on the contract. The Central Office IAS Liaison will notify the RE and DME after the modifications have been made.

MATERIALS FOLDER TAB

Materials Folder Tab Description

The Materials folder tab allows the specification of the conversion factor and approved source required indicator for a selected material on a bid item. If necessary, the Material can also be viewed from this window.

Component Materials and Contractor Options

All possible component materials and Contractor Options that require S&T should be listed for the Bid Item.

For example, if a Bid Item can have three different types of Fly Ash, then all three types should be listed for the Bid Item in the 'Open' select list.

NOTE: The DME will delete the materials that do not apply to a specific contract on the Contract Sampling and Testing window. If there is a possibility that the material will be used on the item at some point in the Contract, the DME may change the conversion factor to zero. If the material is not used by the end of the project, the DME should delete the material code.

Adjustment to Conversion Factor

The conversion factor takes into consideration the materials that are used in the bid item. If the materials are not used consistently; or substitutions of materials are made, the conversion factor will be adjusted accordingly.

Test Requirements of One per Contract

The System Administrator will set the frequency as 1 per 9,999,999 for applicable materials.

NOTE: This S&T Requirement will serve as a reminder that a sample is needed for the Contract. The DME and RE will refer to the Sampling Manual for correct frequencies. The DME and RE are responsible for obtaining samples in accordance with the Manual. The following are examples that have this requirement and will need to be reviewed:

- Geotech Bid Items – Embankment in Place and Excavation

- Lot and Shipment Sampling

- Time Frequency

Additional comments regarding assumptions made in determining the Conversion Factor may be recorded in the Remarks bubble.

Maintaining Contract Materials List

The Contract Change Order component of SiteManager handles changes in material quantities. If a new item is added to the contract through the change order process, contract materials will automatically be updated for the contract bid item once the change order is approved. Material details for items added via change order may be modified throughout the life of the contract through this window.

A Contract can only be generated once in SiteManager. After a Contract has been generated in SiteManager, changes to Sampling and Testing Requirements must be made manually in the Contract Sampling and Testing window.

Field Table

Field Name	KYTC Population Policy & Procedure
Contract	This window name is auto populated with the Contract ID.
Project	This window name is auto populated with the Project Number.
Bid Item Code	This window name is auto populated with the Bid Item Code.
Item Unit	This window name is auto populated with the Bid Item Unit.
Description and Supplemental Descriptions	This window name is auto populated with the description of the bid item.
Material Code	The DME may add or delete any materials necessary to fulfill the sampling and testing requirements for the items on the contract.
Conversion Factor	The conversion factor is used by SiteManager to calculate the quantity of material represented in the associated contract bid item. The DME may change the conversion factor based on contract specifications.
Approved Source Required	This field indicates whether or not an approved source from the Approved Materials (i.e. Brand Name Product) functionality must be associated with the material. If the indicator displays a checkmark, the name of an approved product must be entered in the Sample Information window when creating a sample record for the material. In most cases the default for this field should be accepted. However, the DME may select (or unselect) the checkbox based on specific situations related to the contract.
Material Quantity	This field is auto populated with the Material Quantity expected to be utilized over the life of the contract. SiteManager calculates this value as follows: (Bid Qty of Bid Item + Change Order Qty) * Conversion Factor.

Field Name	KYTC Population Policy & Procedure
Material Unit	The DME may change the Material Unit field based on contract specifications, however, he/she must change the conversion factor accordingly based on the new unit.
Special Instruction	This field may be utilized by the DME to note any special situations or special notes in the proposal. Any changes made to the material unit and/or conversion factor should be noted here. NOTE: This field will be included in a custom "Sampling Checklist" report.

SAMPLE AND TESTING FOLDER TAB

Sample and Testing Folder Tab Description

The Sample and Testing folder tab details the sampling and testing requirements for the given contract bid item to material association.

Procedure

In KYTC, the Contract S&T Requirements should be entered in accordance with the field table definitions below. Additional comments regarding assumptions made in determining the Conversion Factor and/or frequency may be recorded in the Remarks bubble.

Sample Types and Acceptance Methods should be used in determining S&T Requirements as defined below:

- Verification – Verification should be chosen as a Sample Type for materials that are sampled for the purpose retesting questionable material (example: Verification samples). Verification should NOT be set up as an S&T Requirement. Possible Acceptance Methods are Test Results.

- Independent Assurance – Independent Assurance should be chosen as a Sample Type when materials are sampled for the purpose of meeting Independent Assurance S&T Requirements. The only possible Acceptance Method is Test Results.

- Informational – Informational should NOT be set up as a S&T Requirement. This should be chosen on a sample record for samples that are taken for CCRL, AMRL, and for other samples that should not be counted toward Contract S&T Requirements (e.g. New Products or new suppliers). Possible Acceptance Methods are Test Results and Certification.

- Mix Design Approval – Mix Design Approval should be chosen as a Sample Type for the Material Code Mix Design Approval and when materials are sampled for the purpose of Mix Design approval. The only possible Acceptance Method is Mix Design Approval.

- Project Acceptance – Project Acceptance should be chosen as a Sample Type for materials sampled for the purpose of fulfilling Contract S&T Requirements. Possible Acceptance Methods are Visual Inspection, Test Results, and Certification.

- QA – QA should be chosen as a Sample Type for materials sampled for the purpose of Verification of Contractor's Quality Control Testing. A possible Acceptance Method is Test Results.

- QC – QC should be chosen as a Sample Type for materials sampled for the purpose of Contractor's Quality Control Testing. A possible Acceptance Method is Test Results.

Field Table

Field Name	KYTC Population Policy & Procedure
Contract	This field is auto populated with the Contract ID.
Project	This field is auto populated with the Project number.
Bid Item Code	This field is auto populated with the Bid Item Code.
Item Unit	This field is auto populated with the Item Unit.
Description and Supplemental Description	This field is auto populated with the description of the bid item.
Producer Supplier Code	In most cases the P/S field will be populated for the Contract Sampling and Testing Requirements but should be specified when logging the sample in the Sample Information window.
Sample Type	This field may not be modified. - For IAS requirements, the Sample Type will be 'INDEPENDENT ASSURANCE SAMPLE'.
Acceptance Method	This field may not be modified. - For IAS requirements, the Acceptance Method will be 'TEST RESULTS'.
Test Method	This field may not be modified. - For IAS requirements, the Test Method will be added for each IAS requirement.
Sample Location	This field may not be modified.

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Field Name	KYTC Population Policy & Procedure
Sample Rate	This field may be modified. - For IAS requirements, the Rate will be '1' and the Frequency will be determined as per IAS requirements for that material. - All requirements will be listed. The most common will have a Sample Rate value of '1'. All other requirements will have a value of '0'. The DME will modify the Rate to reflect the correct requirement for the contract.
Sample Frequency	This field may not be modified.
Sample Size	This field may not be modified.
Sample Unit	This field may not be modified.
Sample Responsibility	This field may not be modified. If CONTRACTOR is chosen, user will log comment in the remarks bubble of the Sample Information window regarding the specific type of *consultant* or *other agency* that took the sample. - For IAS requirements, the Sample Responsibility will be 'STATE'.
Test Responsibility	This field may not be modified. If CONTRACTOR is chosen, user will log comment in the remarks bubble of the Sample Information window regarding the specific type of *consultant* that tested the sample. - For IAS requirements, the Test Responsibility will be 'STATE'.