



# **SiteManager for Central Office and DME's**

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Instructor Edition

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Prepared by



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## Objectives

In this course, you will learn the following:

- Start and Exit SiteManager
- Navigate to the Materials Management Panel
- Identify the Materials Management Components of SiteManager
- Open and Close a Materials Management Component
- View a Material Description
- View Material Tests
- View a Material Test Specification
- View Material Gradations
- View a Material on a Bid Item
- View the Sampling and Testing Requirements for a Bid Item
- View the KYTC Outstanding Item List
- Generate Contract Materials
- Modify Contract Sampling and Testing Requirements
- View the Source Material Custom Report
- Enter Sample Information
- Enter Additional Sample Data
- Associate a Sample with a Contract Item

- Enter Other Sample Data
- Associate a Sample to a Test
- Enter Test Data
- Associate Testing Personnel to a Test
- Authorize a Sample
- Revise, Copy, and Link a Sample
- Access Sampling and Testing Reports
- Describe the KYTC Applet Upload Procedures
- View a SUPERPAVE Mix Design Window
- View a Portland Cement Concrete Mix Design Window
- View a Pavement Structural Design Window
- Modify a Pavement Structural Design
  
- View an Approved Product
- View Test and Fee Information
- View a Qualified Lab and Tests
- View Sampler Qualifications
- View Welder Qualifications
- View Tester Qualifications
- Access Approved List Reports

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Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

# Section 1 Getting Started with Materials Management

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By the end of this learning module, you will be able to do the following:

Start and Exit SiteManager

Navigate to the Materials Management Panel

Identify the Materials Management Components of SiteManager

Open and Close a Materials Management Component

## Using the Student Guide

The student guide has been divided into learning modules. Each learning module consists of the following sections.

- Objectives
- Topics
- Instructor-Led Exercises
- Review
- Summary Exercise
- Questions and Answers

### Objectives

Each learning module begins with the objectives both you and the instructor should try to achieve.

### Topics

Each learning module contains topics corresponding to these objectives. Each topic contains a short description of the SiteManager function being addressed and an instructor-led exercise.

### Instructor-Led Exercises

Identify instructor-led exercises by the bulldozer icon and sequential numbering. Each instructor-led exercise is very explicit and details the specific steps to follow and data to use.



#### Exercise 5-2

Instructor-led exercises are identified by the Bulldozer graphic

**Figure 1-1**

### Reviews

Each learning module ends with a review and most modules end with a summary exercise. The review summarizes the main points learned and all of the SiteManager functionality covered in the module. Each review is an excellent reference for the summary exercise that follows. Remember to use the reviews when you return to your office and begin using SiteManager on your own.

### Summary Exercises

Summary exercises provide a means to practice the skills you acquired in the learning modules. Read them carefully; the summary exercises are more general than instructor-led exercises, but they still provide steps to follow and data to use. As you perform the summary exercise, refer to the review for tips on SiteManager navigation. The exercises build on the previous exercises; therefore they must be done in sequence.

## Questions and Answers

Commonly asked questions along with the associated answers have been added at the end of each section. These are questions that KYTC personnel have asked during the implementation. We included them in this manual to help you better understand SiteManager.

## Procedures and Assumptions

SiteManager procedures, the steps you follow to access a component of SiteManager, vary depending on whether you have just entered the system or have been in some other component and have already selected a common variable.

For instance, let us suppose you enter the SiteManager application and navigate directly to the Producer/Supplier window. You then navigate to the Maintain Producer/Supplier window which also requires the selection of a Producer Supplier Code. Since you have been working in the Producer/Supplier Materials component and previously selected a Producer/Supplier, the Maintain Producer/Supplier window opens with the previously selected Producer/Supplier. The exercises are presented in a sequence that must be followed.



*Hint: The procedures in this manual describe how to access components of SiteManager as if you just entered the application. The previous paragraph describes SiteManager's short term memory. SiteManager remembers the last contract, item material, etc. that you have opened. If you open a new window that has already been opened in the current SiteManager session, SiteManager will remember and automatically open the window with the previously selected record*

## Starting and Logging On to SiteManager

Start SiteManager the same way you would any program on your computer.



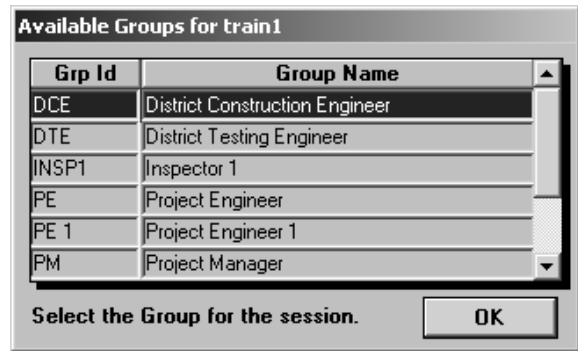
The SiteManager  
Desktop Icon  
**Figure 1-2**

To start and log on to SiteManager:

1. Double-click the **SiteManager** desktop icon.
2. In the **User ID** field, type your user ID.
3. Press the **Tab** key.
4. In the **Password** field, type your password.
5. If appropriate, in the **Connect to** drop-down list, click the expand arrow to the right of the current selection and click the desired database choice.
6. Press **Enter**.
7. If your user ID has been assigned to multiple groups, appropriate in the **Available Groups for...** dialog box, click the group ID.
8. Press **Enter**.



The SiteManager Logon Dialog Box  
**Figure 1-3**



The Available Groups Dialog Box  
**Figure 1-4**

**Note:** If you know you will need to access an RTF template in Standalone mode or run it online, before uploading it in the Upload Template dialog box, select the Download RTF Templates checkbox. Doing so will download the template to the local Client Database on each user's computer. Otherwise, do **NOT** select the Download RTF Templates checkbox. By default, the Download RTF Templates checkbox is not selected. KYTC will not be using RTF reports for Materials. At the time of printing, KYTC will continue to use RTF Reports for the Construction component of SiteManager.



## **IMPORTANT TIPS REGARDING (KYTC) POLICIES AND PROCEDURES**

### **ADDING NEW USERS**

The Requester (for example, District Office Manager) sends an email to the applicable Materials or Construction SiteManager System Administrator to request a SiteManager User ID. Include the following information in the Request Form.

- Crew Number
- District Number
- Title
- First Name
- Last Name
- Usage of SiteManager (for example, Inspector, Materials Tester)
- Office Wide Access or Contract Specific Access

### **LOGGING ON TO SITEMANAGER**

1. If you attempt to log on three times and fail, SiteManager disables your password.
2. If you attempt to log on twice and fail, close the SiteManager Logon window and start again. This will allow you to try to log on again without disabling your password.
3. If you attempt to log on three times and fail; contact the Central Office SiteManager Help Desk (502) 564-4780 to have your password reset.

### **DETERMINING SITEMANAGER USER IDS**

1. SiteManager User IDs are composed of the first letter of the employee's first name followed by the first seven letters of the employee's last name for a total of eight lowercase letters.
2. If there are identical IDs, a sequence number will replace the last two digits of the ID to make each one unique.

### **CREATING AND MAINTAINING SITEMANAGER PASSWORDS**

1. When a User ID is first assigned to a User, the default password is **PASSWORD** (all caps). The User must change the password before logging on to SiteManager.
2. Passwords must be eight characters in length consisting of letters and numbers.
3. It is important that you do not give out your password to anyone. SiteManager maintains a record of everything you do in SiteManager. These records are the same as your signature.
4. ID and passwords are case sensitive. Type your ID and password precisely.
5. Passwords will expire and have to be changed every 31 days.



### Exercise 1-1

In this exercise, you will log on to SiteManager.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. **Double-click** the SiteManager desktop icon.
2. In the **User ID** field, type **sfoster**.
3. In the **Password** field, type **kentucky**.
4. In the **Connect To** dropdown list, select **Training Server**.
5. Click **Logon**.

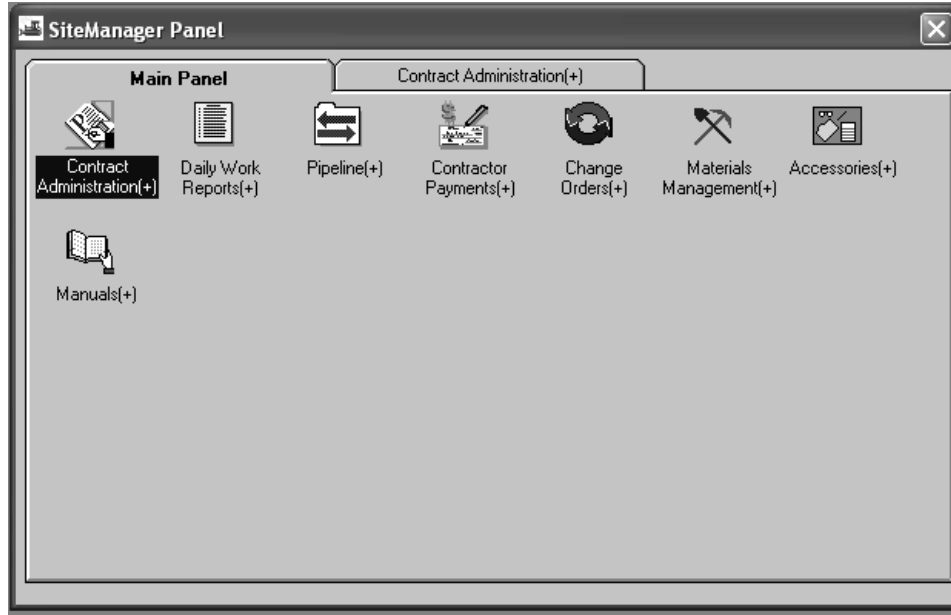


*FYI: SiteManager opens with the SiteManager Panel displaying the Main Panel. The Available Groups dialog box appears if the user is a member of more than one group. Stephen Foster is a member of only one security group; the DME. Therefore, the Available Groups dialog did not appear.*

## The SiteManager Panel

After starting the SiteManager application, the SiteManager Panel displays the central functions of SiteManager. The Main Panel contains an icon for each of the following components:

- Contract Administration
- Daily Work Reports
- Pipeline
- Contractor Payments
- Change Orders
- Materials Management
- Accessories
- Manuals



The SiteManager Panel Window - Main Panel  
**Figure 1-5**

## Security and the Available SiteManager Components

KYTC defines the panels and icons to which you have access. The preceding panel and all of the following documentation describes and illustrates the content of all components of SiteManager. You may not have access to all of the components represented in the figures unless you have security access to all components of SiteManager.

## The Status Bar

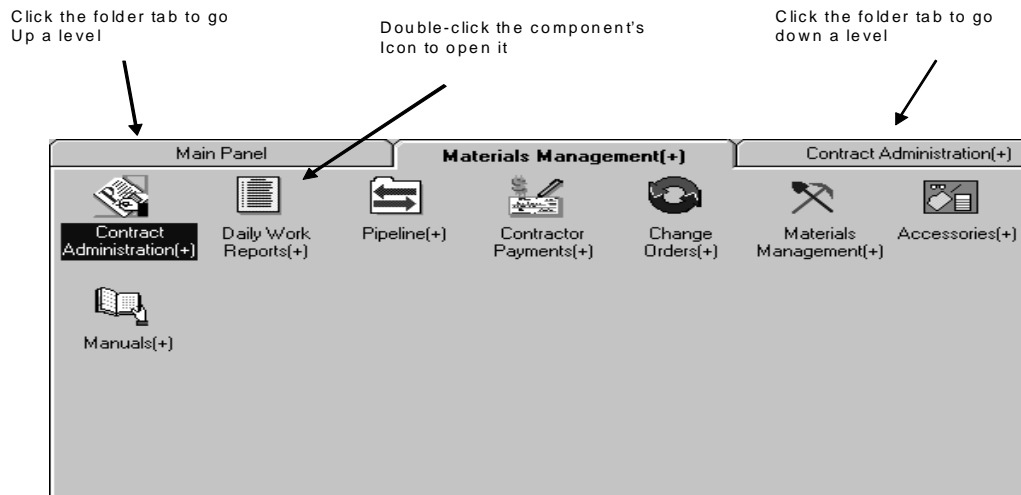
The Status Bar at the bottom of the SiteManager window indicates your mode, connection, database region, group ID, and user ID.



The Status Bar  
**Figure 1-6**

## Navigating Using the SiteManager Panel

Use the SiteManager Panel to navigate to SiteManager's components. The highest level is the Main Panel that contains the different functional groups, with each group individually represented by an icon. Double-clicking the icon of a functional group opens another panel consisting of the sub-groups or the actual windows contained within that functional group. As icons are selected, the next panel's tab appears next to the current panel's tab.



Navigating in SiteManager  
**Figure 1-7**





## Exercise 1-2

In this exercise, you will learn to navigate to the Materials Management component.

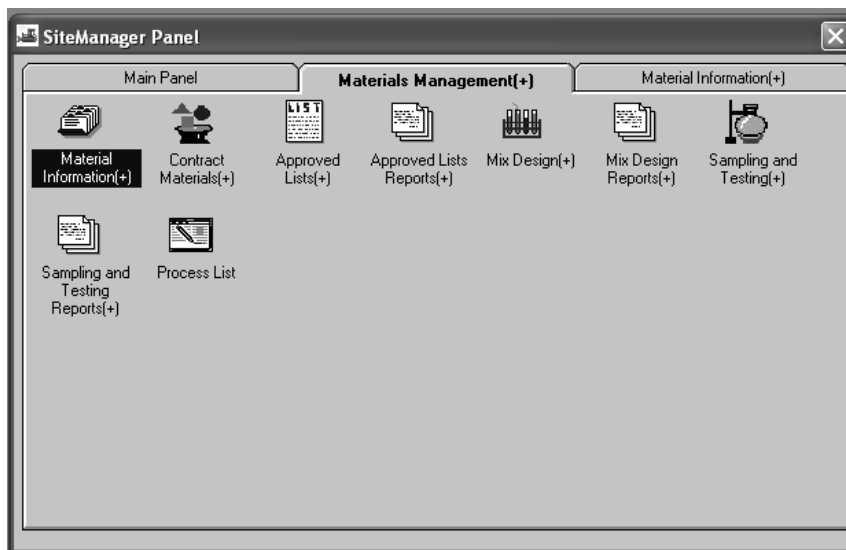
User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. In the **Main Panel** panel, double-click the **Materials Management** icon.

## The Materials Management Panel

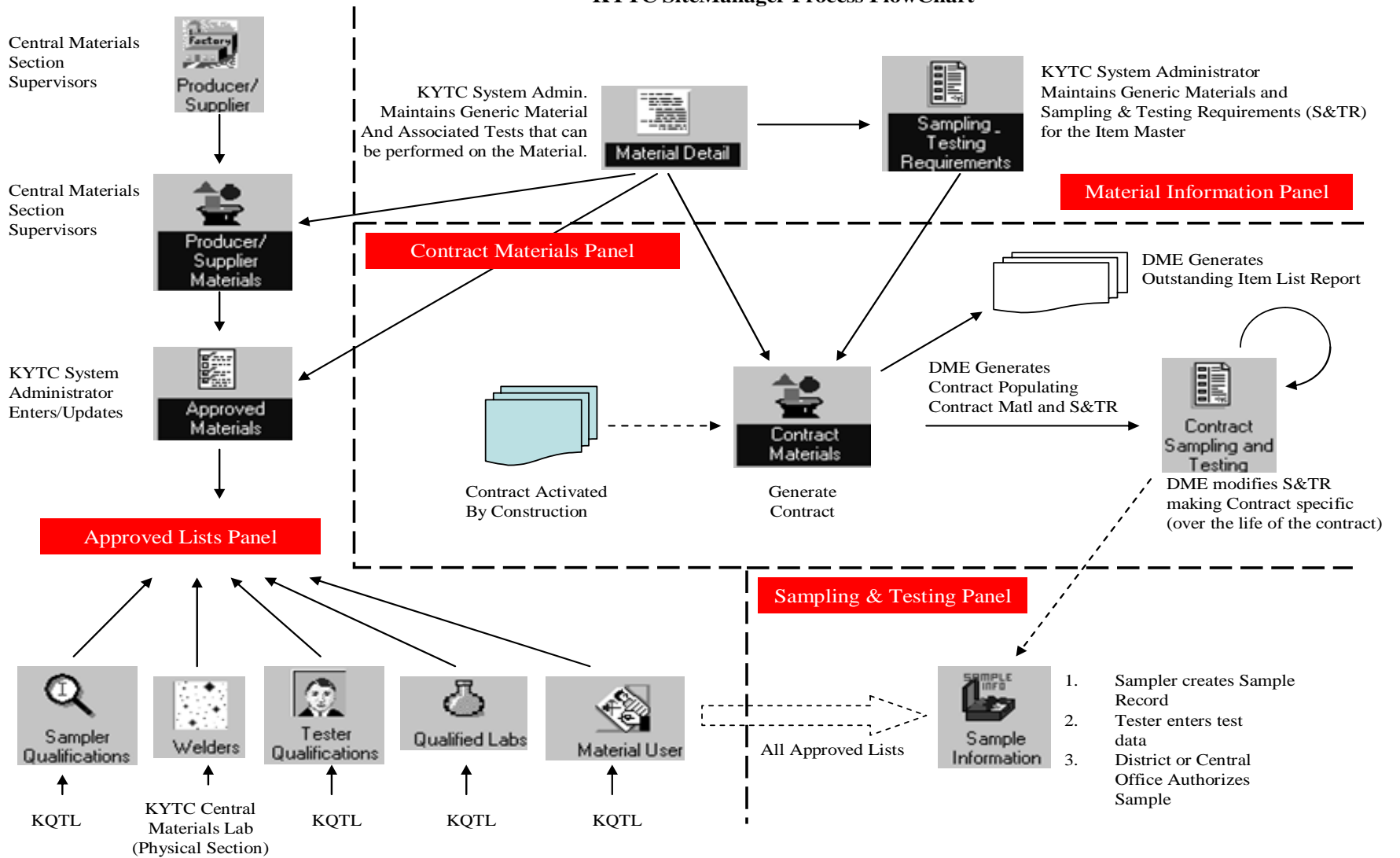
The Materials Management components of SiteManager are located on the Materials Management panel. The Materials Management components contain key functions, many of which have report counterparts with standard reports in SiteManager. The Process List function has custom reports specific to KYTC:

- Material Information
- Contract Materials
- Approved Lists
- Mix Design
- Sampling and Testing
- Process List (custom reports specific to KYTC)



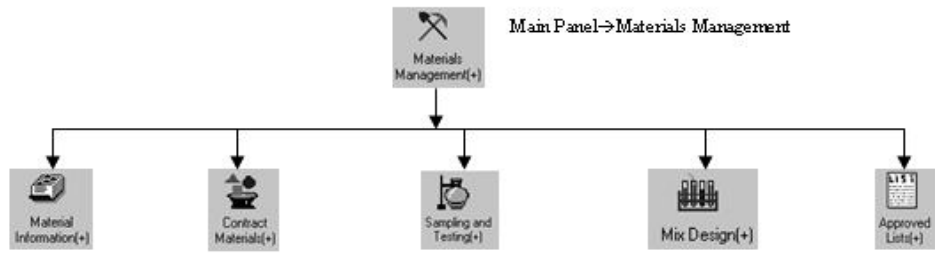
The Materials Management Panel  
**Figure 1-8**

### KYTC SiteManager Process FlowChart

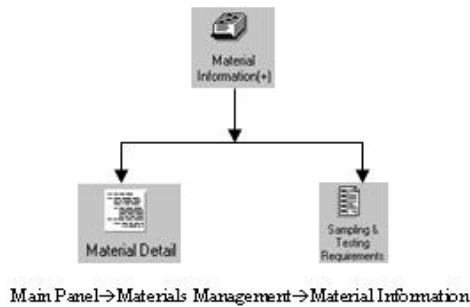


KYTC SITEMANAGER MATERIAL MANAGEMENT PANEL NAVIGATION

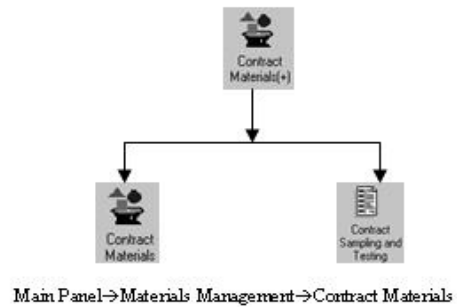
**MATERIALS MANAGEMENT PANEL**



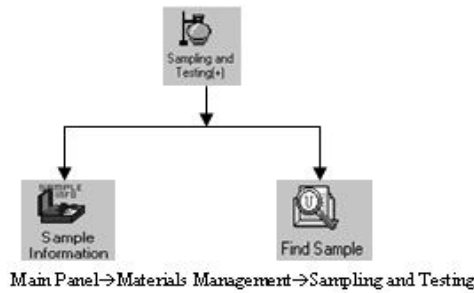
**MATERIAL INFORMATION PANEL**



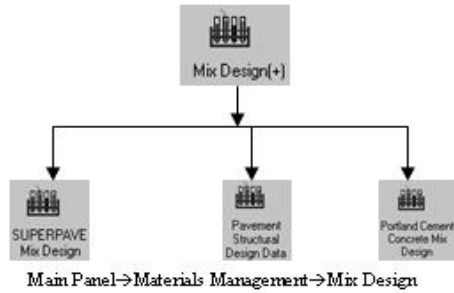
**CONTRACT MATERIALS PANEL**



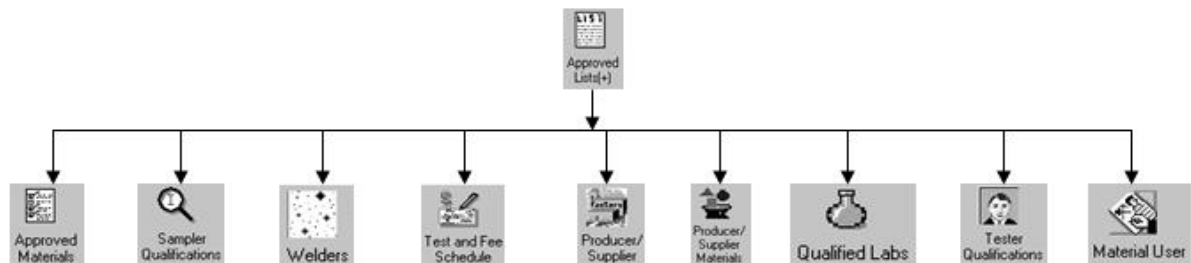
**SAMPLING AND TESTING PANEL**



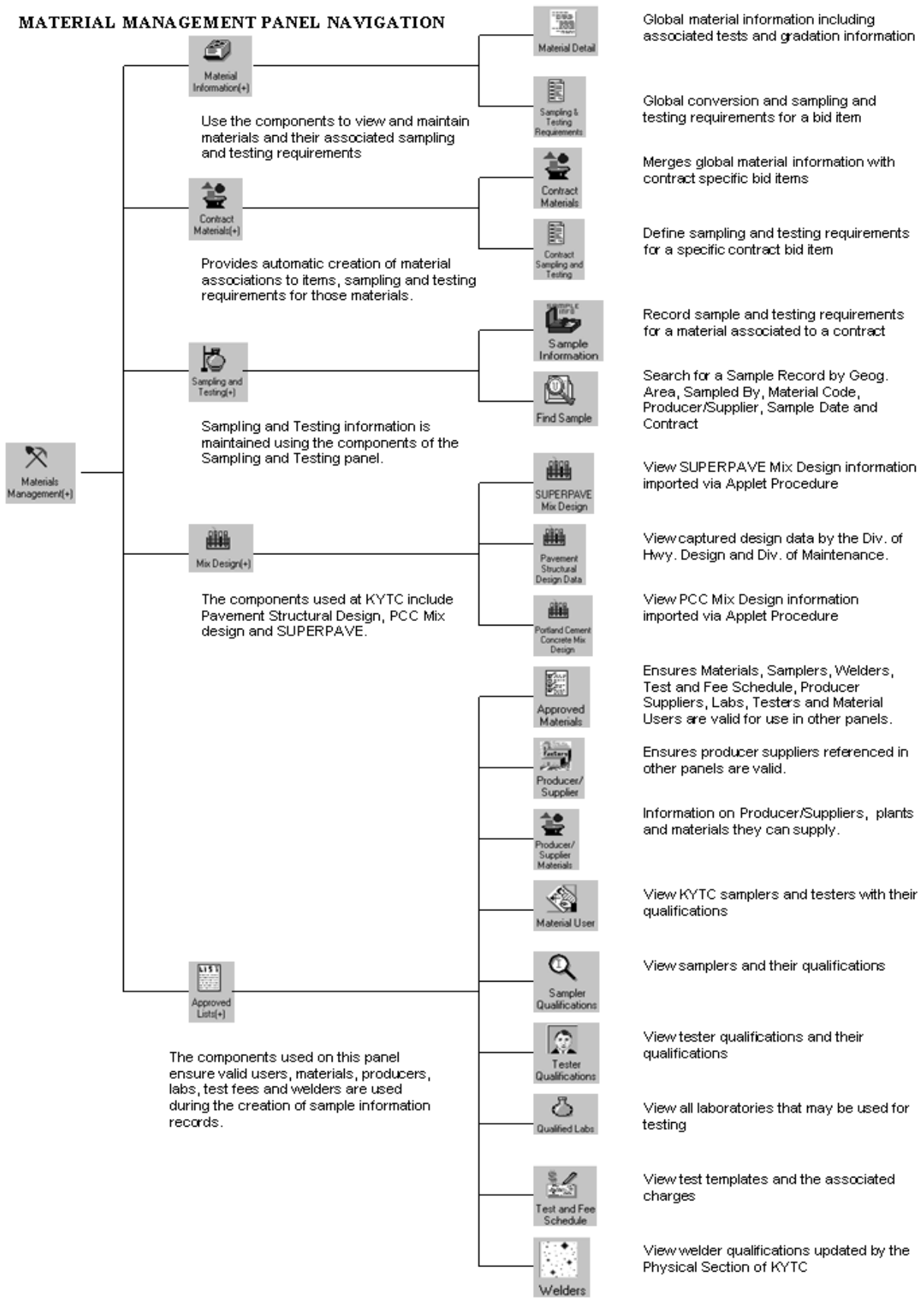
**MIX DESIGN PANEL**



**APPROVED LISTS PANEL**



Main Panel → Materials Management → Approved Lists



To open a Materials Management component of SiteManager:

1. Double-click the desired Materials Management component's icon.



### Exercise 1-3

In this exercise, you will learn to navigate using the SiteManager Panel while browsing most of the Materials Management components.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the Materials Management panel, double-click the **Material Information** icon.
2. Click the **Materials Management** panel's tab.
3. Double-click the **Contract Materials** icon.
4. Click the **Materials Management** panel's tab.
5. Double-click the **Approved Lists** icon.
6. Click the **Materials Management** panel's tab.
7. Double-click the **Mix Design** icon.
8. Click the **Materials Management** panel's tab.
9. Double-click the **Sampling and Testing** icon.
10. Click the **Materials Management** panel's tab.

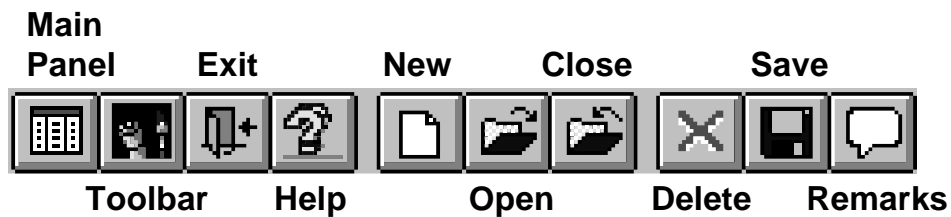
## Opening and Closing Materials Management Components

To open a component, double-click an icon. There are two ways to close a component.

- From the File menu, click the Close choice.

OR

- On the toolbar, click the Close button.



The SiteManager Toolbar  
Figure 1-9

To open a component of SiteManager:

1. On the **Materials Management** panel, double-click the desired icon.
2. On the second folder tab of the **Materials Management** component, double-click the desired icon.

To close a component of SiteManager:

1. On the toolbar, click the **Close** button.

OR

1. From the **File** menu, click the **Close** choice.



## Exercise 1-4

In this exercise, you will learn to open and close components.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Materials Management** panel, double-click the **Material Information** icon.
2. Double-click the **Material Detail** icon. SiteManager displays the Select Material window.
3. Select Material Code **40165-CLASS F FLYASH**. To view information regarding the desired material, click the **OK** button. SiteManager displays the Material Detail window.



*Hint: To help you locate a material, click the “Material Code” column heading. This will cause two actions to occur. First, the material codes will sort. Second, the “Find” textbox will allow you to enter a value. To locate a material quickly, enter the first character of the material code you are looking for in the “Find” textbox. In this example, enter a “4”. This will find the first material code that contains a “4”. Enter a “0”. This will find the first material code that contains the characters “40”. Continue this process until you locate the material code you are seeking.*

4. Click the **Close** button.  
Now, let’s open another component.
5. Click the **Materials Management** folder tab.
6. Double-click the **Mix Design** icon.
7. Double-click the **SUPERPAVE Mix Design** icon.
8. Select Mix Design **60088**.
9. Click the **OK** button
10. Click the **Close** button.

## Closing Versus Exiting in SiteManager

While SiteManager is not document oriented like other common Windows® applications, the same principle of closing versus exiting still applies. When you are in a SiteManager component and you wish to end your work in it, but still continue to perform other SiteManager activities, you should *close*. As with other applications, you should only *exit* when you are through with your activities.

| File          | Edit | Services | Window  |
|---------------|------|----------|---------|
| Open          |      |          | Ctrl+O  |
| Close         |      |          | Ctrl+F4 |
| New           |      |          | Ctrl+N  |
| Delete        |      |          | Ctrl+D  |
| Save          |      |          | Ctrl+S  |
| Refresh       |      |          | Ctrl+F  |
| Print Setup   |      |          | Ctrl+U  |
| Print Preview |      |          | Ctrl+W  |
| Print         |      |          | Ctrl+P  |
| Main Panel    |      |          | Ctrl+M  |
| Exit          |      |          | Alt+F4  |

The File Menu  
**Figure 1-10**

To close a SiteManager component:

1. On the toolbar, click the **Close** button.

OR

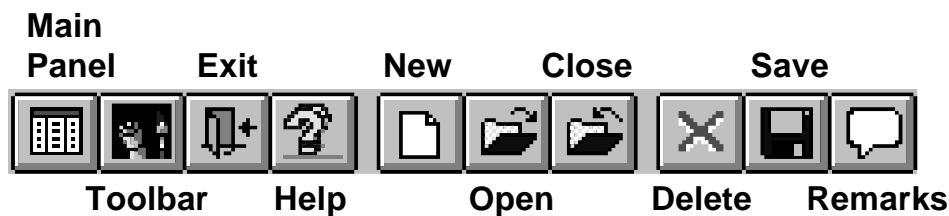
1. From the **File** menu, click the **Close** choice.

To exit SiteManager:

1. On the toolbar, click the **Exit** button.

OR

1. From the **File** menu, click the **Exit** choice.



The SiteManager Toolbar  
**Figure 1-11**





### Exercise 1-5

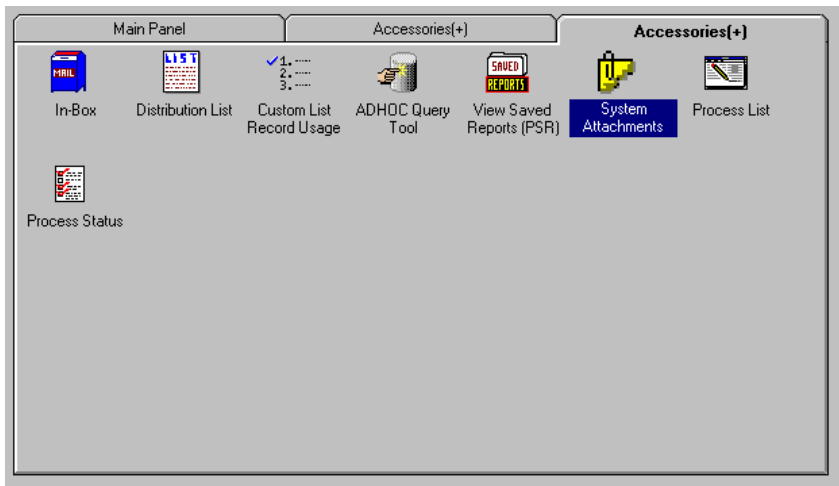
In this exercise, you will learn to exit SiteManager.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the toolbar, click the **Exit** button.

### KYTC Guidelines and Procedures

KYTC SiteManager guidelines and procedures can be accessed directly within SiteManager. URL links to the guidelines and manuals are located in the System Attachments icon. The System Attachment icon is accessed from the Main Panel→System Accessories.



The SiteManager Toolbar  
**Figure 1-12**

| Name             | Type | Description  | Autorun                  |
|------------------|------|--|--------------------------|
| Spec Book        | URL  | Specification Book   | <input type="checkbox"/> |
| AMAW Guide       | URL  | AMAW Guide   | <input type="checkbox"/> |
| GenNote4 IAST    | URL  | General Notes for Independent Assurance Sampling and Testing | <input type="checkbox"/> |
| Policy and Proc  | URL  | Policies and Procedures                                      | <input type="checkbox"/> |
| Kentucky Method  | URL  | Kentucky Methods   | <input type="checkbox"/> |
| MatFldS&T Manual | URL  | Materials Field Sampling and Testing Manual                  | <input type="checkbox"/> |
| P/PConcrete Man  | URL  | Precast/Prestressed Concrete Manual                          | <input type="checkbox"/> |
| IndAssurTst Req  | URL  | Independent Assurance Tests Requirements                     | <input type="checkbox"/> |

The SiteManager Toolbar  
**Figure 1-13**

# Review for Section 1

To start SiteManager:

1. Double-click the **SiteManager Training** desktop icon. The SiteManager Logon dialog box appears.
2. In the **User ID** field, type your user ID.
3. Press the **Tab** key.
4. In the **Password** field, type your password.
5. If appropriate, in the **Connect to** drop-down list, click the expand arrow to the right of the current selection and click the desired database choice.
6. Press **Enter**.
7. If appropriate, in the **Available Groups** dialog box, click the group ID.
8. Press **Enter**.

To open a Main Panel component of SiteManager:

1. Double-click a component's icon.

To navigate down a panel in SiteManager:

1. After selecting a component's icon, click the panel's tab.

OR

1. Double-click a component's icon.

To navigate up a panel in SiteManager:

1. Click the panel's tab.

To open a Materials Management component of SiteManager:

1. Double-click the desired **Materials Management** component's icon.

To open a Materials Management component of SiteManager:

1. On the **Materials Management** panel, double-click the desired icon. The final panel displays.
2. On the third panel, double-click the desired icon.

To close a Materials Management component of SiteManager:

1. Click the **Close** button.

OR

1. Click the **File** menu and click the **Close** choice.

To close a SiteManager component:

1. On the toolbar, click the **Close** button.

OR

1. From the **File** menu, click the **Close** choice.

To exit SiteManager:

1. On the toolbar, click the **Exit** button.

OR

1. From the **File** menu, click the **Exit** choice.

## Summary Exercise for Section 1

In this exercise, perform the instructions and write your answer to the questions in the space provided.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Log on to SiteManager using the **sfoster** ID in the **DME** (District Materials Engineer) group.
2. Navigate to the **Pavement Structural Design Data** icon.
3. On what third level panel is the **Pavement Structural Design Data** icon located?  
Main Panel→Materials Management(+)  
→Mix Design(+)
4. Navigate to the **Sampling and Testing Requirements** window.
5. Open **Item Code 00003 E Unit System Indicator, Spec Year 2004, Material Code 10450**.
6. On what **TWO** third-level panels are **Sampling and Testing Requirements** icons located?  
Main Panel→Materials Management(+)  
→Material Information and Main Panel→Materials Management(+)  
→Sampling and Testing
7. Navigate to the **Welders** window.



*Hint: The “Select Welder” window displays the Welders ID and Name for each qualification the welder has obtained. For example, if a welder is qualified for Shielded Metal Arc-Groove-Overhead and Vertical position, he will appear twice in the “Select Welder” window. The user can choose either selection. The Welder window will open and display all of the Welders qualifications*

8. Open the record for **1248JM1 – MCNAMARA, JONATHAN**.
9. On what third-level panel is **Welders** located? Main Panel→Materials Management(+)  
→Approved Lists
10. Navigate to the **Materials Management** panel.
11. **Exit** SiteManager.





Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## **Section 2 Material Information**

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By the end of this learning module, you will be able to do the following:

View a Material Description

View Material Tests

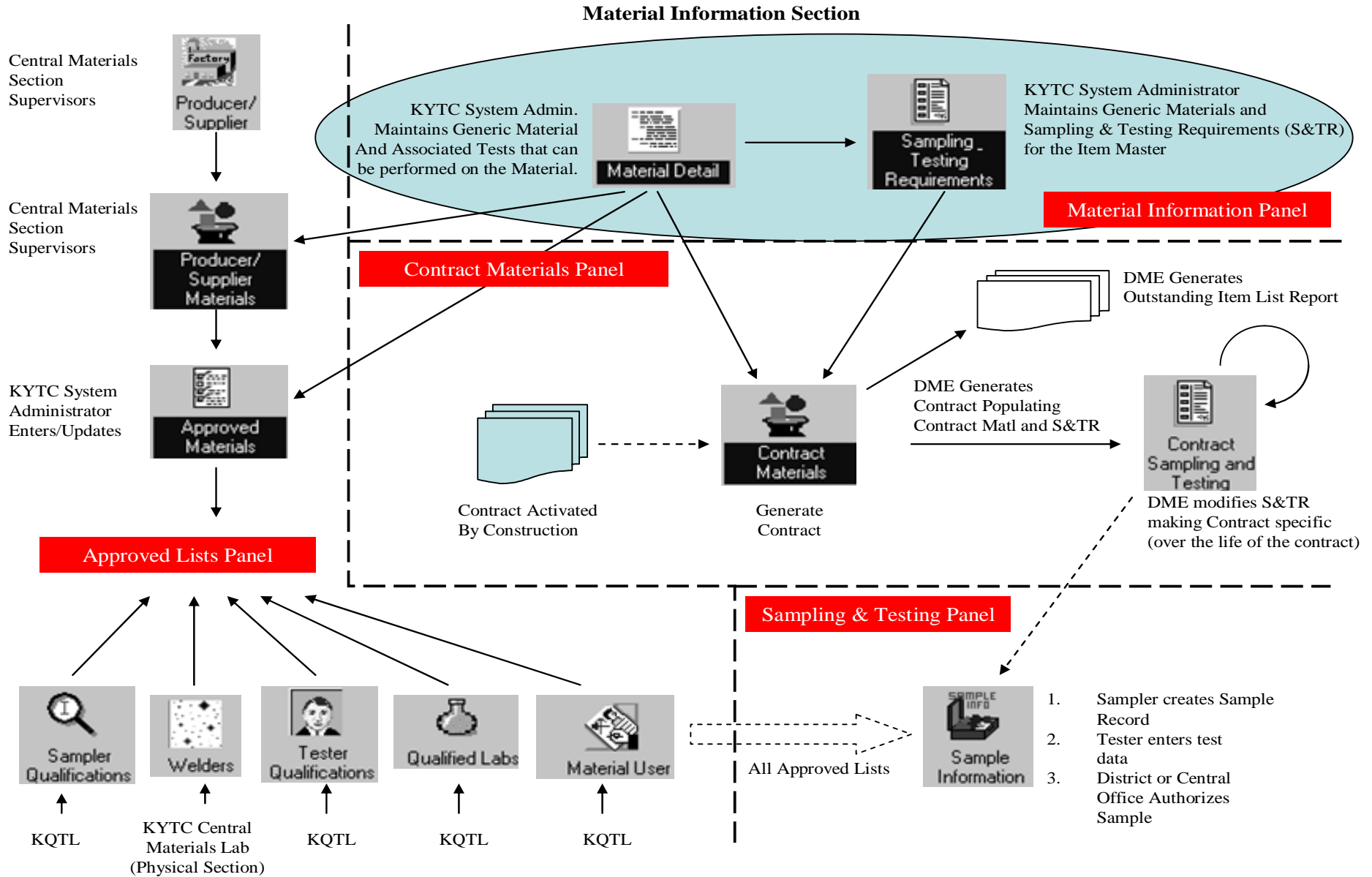
View a Material Test Specification

View Material Gradations

View a Material on a Bid Item

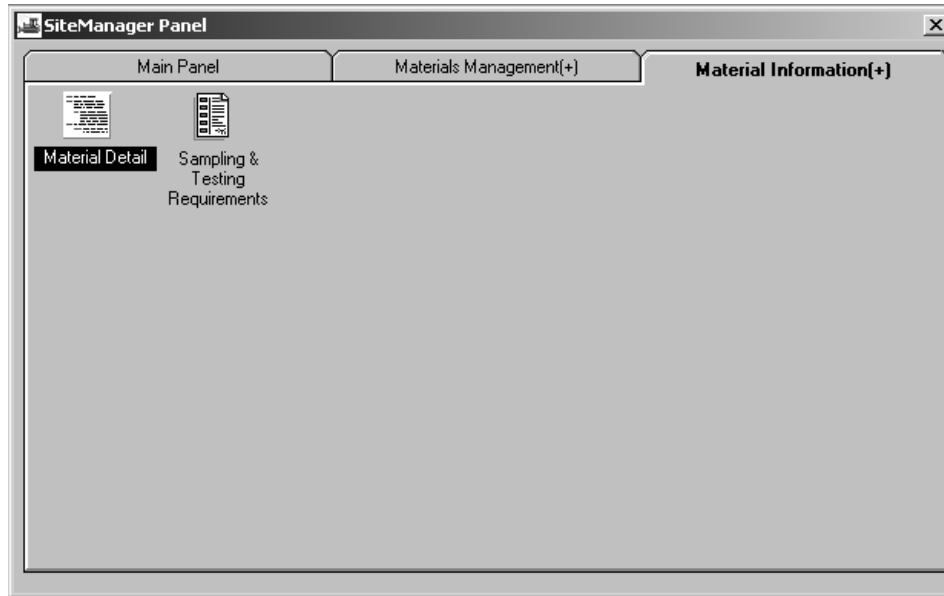
View the Sampling and Testing Requirements for a Bid Item

# KYTC SiteManager Flow Chart Material Information



## The Material Information Panel

Use the components of the Material Information panel to view and maintain materials and their associated sampling and testing requirement(s).



The Material Information Panel

Figure 2-1



### Exercise 2-1

In this exercise, you will learn to open the Material Information panel.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. To start SiteManager, double-click the **SiteManager Training** desktop icon. The **SiteManager Logon** dialog box appears.
2. In the **User ID** field, type **sfoster**.
3. Press the **Tab** key.
4. In the **Password** field, type **kentucky**.
5. In the **Connect To** dropdown list, select **Training Server**.
6. Click the **Logon** button.
7. On the **Main Panel**, double-click the **Materials Management** icon.
8. On the **Materials Management** panel, double-click the **Material Information** icon. The Material Information panel appears.

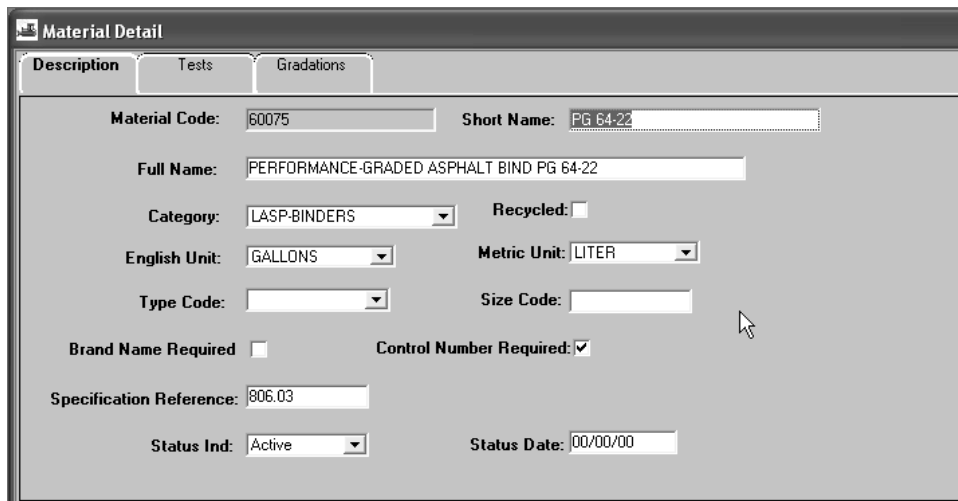
## Viewing a Material

Use the Material Detail window to view the Kentucky Transportation Cabinet (KYTC) SiteManager material inventory. The Material Detail window has three folder tabs that allow for viewing basic material information and testing options for the selected material:

- Description
- Tests
- Gradations

## Viewing a Material Description

SiteManager uses the material information recorded on the Description folder tab for material validations throughout other portions of SiteManager, including approved lists, mix designs, and sampling and testing. For example, approved list data, including approved brands and material suppliers, is linked to the material data captured in the Material Detail functionality. Additionally, you may create mix design and sample records only for materials listed in the material inventory.



The screenshot shows a software window titled "Material Detail" with three tabs: "Description", "Tests", and "Gradations". The "Description" tab is active. The form contains the following fields and values:

|                          |  |                          |                                     |
|--------------------------|--|--------------------------|-------------------------------------|
| Material Code:           | 60075                                    | Short Name:              | PG 64-22                            |
| Full Name:               | PERFORMANCE-GRADED ASPHALT BIND PG 64-22 |                          |                                     |
| Category:                | LASP-BINDERS                             | Recycled:                | <input type="checkbox"/>            |
| English Unit:            | GALLONS                                  | Metric Unit:             | LITER                               |
| Type Code:               |  | Size Code:               |                                     |
| Brand Name Required:     | <input type="checkbox"/>                 | Control Number Required: | <input checked="" type="checkbox"/> |
| Specification Reference: | 806.03                                   |                          |                                     |
| Status Ind:              | Active                                   | Status Date:             | 00/00/00                            |

The Material Detail Window - Description Folder Tab  
**Figure 2-2**



### KYTC SiteManager Field Definitions

| Field Name              | KYTC Population Policy & Procedure   |
|-------------------------|--|
| Material Code           | Enter a unique identifier for the material. This field is required to save the record.<br>- In KYTC this will be a five digit number (see table below).  |
| Short Name              | Enter an abbreviated description of the material. This field is required to save the record.   |
| Full Name               | Enter the full name or description of the material. This field is required to save the record.   |
| Category                | Select the classification type of the material. This field is required to save the record.   |
| Recycled                | Indicates if the material is recycled. This field will be utilized as appropriate for the material.  |
| English Unit            | Select the English unit of measure for the material (e.g. feet, inches). This field is required to save the record.  |
| Metric Unit             | Select the Metric unit of measure for the material.  |
| Type Code               | Type of material.<br>- KYTC will not be using this field.  |
| Size Code               | Free form field for the further definition of the material.<br>- KYTC will not be using this field.  |
| Brand Name Required     | This field indicates whether or not a brand name must be associated with the material. If the indicator displays a checkmark, the brand name of an approved product must be entered in the Product Name field on the Sample Information window when creating a sample record for the material. Mark the checkbox when applicable.  |
| Control Number Required | Indicates if a control number must be supplied when sampling the material.<br>- This field will be utilized as appropriate for the material. A control number will reference a Lot, Heat, Batch, etc. on the Sampling and Testing record.  |
| Specification Reference | Indicates the material test specification number.<br>- In KYTC, this field can be populated with reference to the section of the specification manual in which the material is listed.<br>- Special Provisions are indicated with SP. Special Notes are indicated with SN. If the field displays REMARKS, then the multiple specifications that the material references are entered in the Remarks bubble. |
| Status Ind              | Select the Status Indicator. Indicates if the material is active or inactive. Inactive indicates the material is no longer in use. Defaults to Active.   |
| Status Date             | Enter the status date. Date when any data on the material record was last changed. Defaults to current date for new records.   |

The Material Detail Window - Description Folder Tab – Field Descriptions  
**Table 2-1**



Policy and Procedure

In KYTC, the Material Code is a five digit number. Each laboratory section uses the block of numbers for Material Codes as listed in the following table.

| Material Codes | Laboratory Section                    |
|----------------|---------------------------------------|
| 10000 – 19999  | Aggregates                            |
| 20000 – 29999  | Asphalt Mixtures                      |
| 30000 – 39999  | Chemical                              |
| 40000 – 49999  | Concrete                              |
| 50000 – 59999  | Geotech                               |
| 60000 – 69999  | Liquid Asphalt                        |
| 70000 – 79999  | Physical                              |
| 80000 – 99999  | Unused                                |
| Z00000         | New Products (for Central Office use) |

KYTC Material Codes by Laboratory Section

**Table 2-2**

**In KYTC, the SiteManager System Administrator will maintain the Material Detail window. Submit all requests for new material codes or modifications of existing material codes to the SiteManager System Administrator on the Material Detail Request Form**



## Exercise 2-2

In the following exercise, you will view a material description.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Double-click the **Material Detail** icon.
2. Scroll to and double-click material code **60075 Performance-Graded Asphalt Bind PG-64-22**.



*Hint: You can use the **FIND** feature in SiteManager to locate a record in a Select List. In this exercise, click the **Material Code** column heading to sort by material code. This will enable you to enter a value in the Find textbox. Enter the value “6” and you notice the first record with a value of “6” highlighted. Enter the value “6007” and this will directly take you to the first material code with the value “6007” somewhere in the material code.*

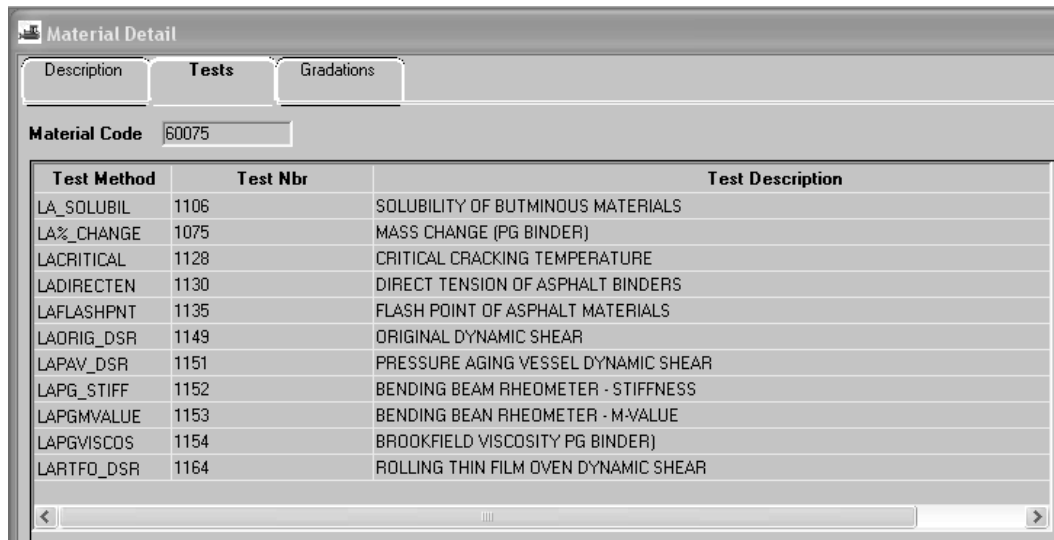
3. What is the **Category** of this material? LASP-BINDERS
4. What is the **English Unit** of this material? GALLONS

Now, prepare for the next exercise.

5. Click the **Tests** tab.

## Viewing Material Tests

Use the Tests folder tab to track the test templates that may be used to record test data for samples of the selected materials. SiteManager uses this information to provide a list of valid tests for materials when performing the Sampling and Testing processes.



The Material Detail Window - Tests Folder Tab

Figure 2-3

## KYTC SiteManager Field Definitions

| Field Name       | KYTC Population Policy & Procedure   |
|------------------|--|
| Material Code    | Auto Populated with the Material Code from the Description folder tab.   |
| Test Method      | After the selecting the test associated to the Material, the KYTC Test Method will be displayed.   |
| Test Nbr         | The SiteManager number used to identify the test window on which the test result information is recorded. This field is display only based on the Test Method selected. The system automatically assigns this number for standard test and when creating the test template corresponding to the test method. |
| Test Description | Displays the KYTC description of the test template.  |

The Material Detail Window - Tests Folder Tab –Field Descriptions

Table 2-3



### Exercise 2-3

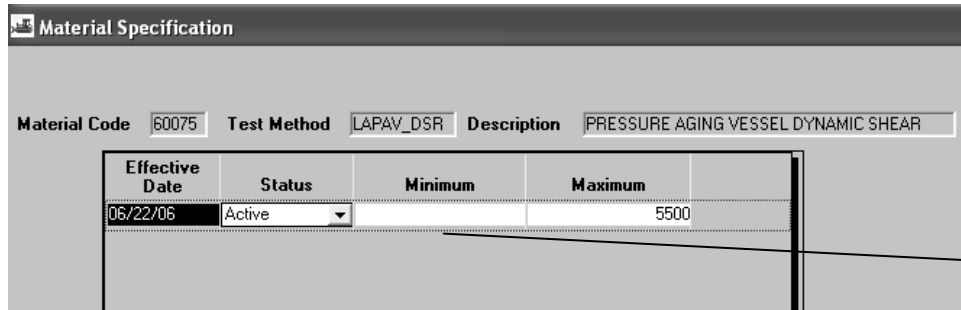
In this exercise, you will learn how to view material tests.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. How many tests are available for this material?  
Eleven
2. Is test method **LAORIG\_DSR – ORIGINAL DYNAMIC SHEAR**, an available test for this material? Yes

## Viewing a Material Test Specification

Use the Material Specification window to view material test specifications. These specifications may be either numeric or alphanumeric and have no validation performed against them. This information gives detail limits to values acceptable by the individual tests specified for a material. Since this material specification can change over time, the specification is maintained by effective date. The data from this window is used during the sampling and testing processes to compare tests results. A material can have one set of test specifications *per effective date*.



A blank value in the Minimum field indicates there is not a minimum specification value.

The Material Specification window  
**Figure 2-4**

## KYTC SiteManager Field Definitions

| Field Name       | KYTC Population Policy & Procedure   |
|------------------|--|
| Material Code    | Displays the Material Code from the Description folder tab.  |
| Test Method      | Displays the Test Method from the Tests folder tab.  |
| Test Description | Displays the Test Description from the Test folder tab.  |
| Effective Date   | Enter the date the test specification becomes effective. There can be multiple Effective Dates.  |
| Minimum          | Enter the beginning value for the specification limit.   |
| Maximum          | Enter the ending value for the specification limit.  |
| Status           | Select the status. Indicates if the test specification is active or inactive. Indicates if the material is active or inactive. Defaults to Active. |

The Material Specification Window – Field Descriptions  
**Table 2-4**



Policy and Procedure

In KYTC, Material (Test) Specifications will only be assigned when the specification values always hold true for the specific test. If the test specifications do not always apply (specification values may vary), this window should not be used. Example: Concrete applications.



### Exercise 2-4

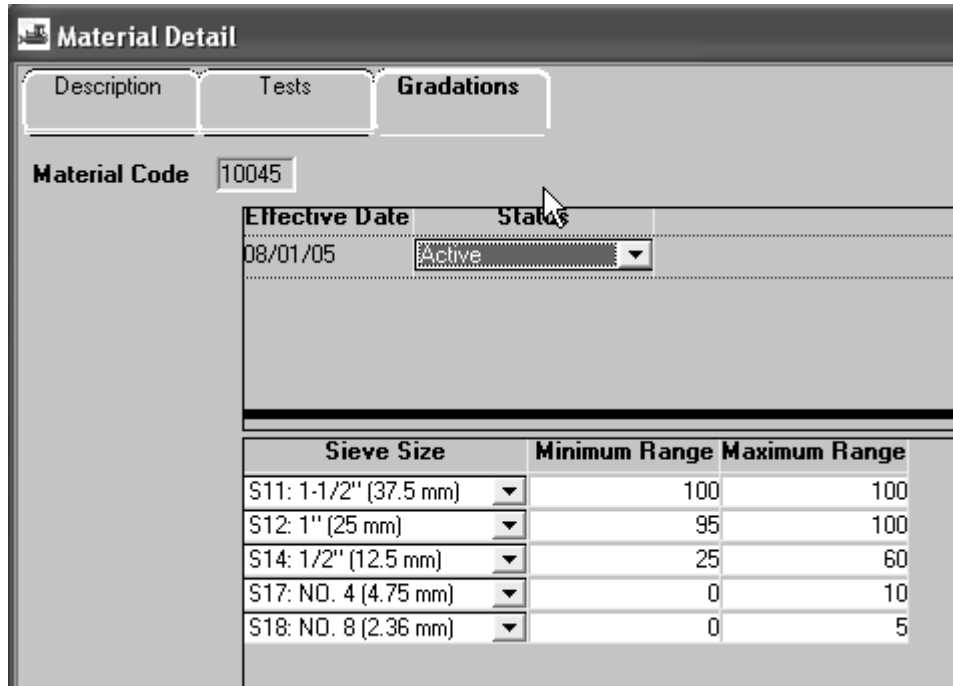
In this exercise, you will learn how to view a material test specification.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the Tests panel tab, click the **LAPAV\_DSR, Test Number 1151**.
2. Click the **Services** menu.
3. Click the **Material Specifications** choice. The Material Specifications window appears.
4. What is the minimum passing value for this test on this material?  
**There is no minimum**
5. What is the maximum passing value for this test on this material? 5500
6. On the toolbar, click the **Close** button.

## Viewing Material Gradations

To outline the minimum and maximum passing percentages for each screen size, use the Gradations folder tab for details about the gradation limits for the specified material. A material may have more than one set of active gradation specifications. The status of a gradation may be changed to inactive to indicate that the gradation is not being used. The Mix Design and Sampling and Testing functions of SiteManager use the data from this window for validation and information.



The Material Detail Window - Gradations Folder Tab

Figure 2-5



### KYTC SiteManager Field Definitions

| Field Label    | KYTC Population Policy & Procedure  |
|----------------|---|
| Material Code  | Displays the Material Code from the Description folder tab.   |
| Effective Date | The date the gradation becomes effective. Defaults to current date when a new set of material gradations are created or copied      |
| Status         | Select the status. Identifies the current status of this contract item record (e.g. active or inactive). Status defaults to active. |
| Sieve Size     | Enter the AASHTO and ASTM standard sieve sizes (e.g. 1/2, # 4). Sieve size is required when Minimum or Maximum values are entered.  |
| Minimum Range  | Enter the beginning value for the gradation limit.  |
| Maximum Range  | Enter the ending value for the gradation limit (must be greater than minimum range value).  |

The Material Detail Window - Gradations Folder Tab – Field Descriptions  
**Table 2-5**



### Exercise 2-5

In this exercise, you will learn how to view a gradation.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the Material Detail window, click the **Gradations** folder tab.



*Note: Not all materials will have gradation information. Material code 60075 is a material that will not have gradation information. Let's look at a material that does have gradations*

2. Click the **Description** tab.
3. Click the **Open** button on the toolbar.
4. Scroll to Material Code **10045 – AGG-#57**.
5. Click **OK**.
6. Click the **Gradations** tab.
7. What are the minimum and maximum ranges for Sieve Size S14: ½”(12.5mm)? 25 and 60
8. Click the **Close** button on the toolbar.

## Viewing Sampling and Testing Requirements

The Maintain Sample and Testing Requirements window allows the identification of materials for a bid item and the minimum sampling and testing requirements guide. To identify the minimum frequency, responsibilities, sample size, and/or unit for the sampling and testing of a material for a bid item, use the Maintain Sample and Testing Requirements window. SiteManager uses the data to generate default contract sampling and testing requirements for new contracts.

You can access the Maintain Sample and Testing Requirements window from two panels, the Material Information or the Contract Materials panel.



*Data that appears in the Sampling and Testing Requirements window on the Material Information panel are used as guidelines. Contract specific information is defined in the Contract and Sampling window. Contract Sampling and Testing requirements and setup will be discussed in the next section.*

## Viewing a Material on a Bid Item

Use the Materials folder tab to view the association of materials to bid items, as well as the conversion factor and approved source indicator for the selected material for a specified bid item. SiteManager uses the conversion factor to calculate the quantity of material represented in the associated bid item.



*A single material may be associated to many different bid items. Materials are associated to bid items in the Maintain Sample and Testing window. A materials sampling and testing requirements may differ from one bid item to the next.*

Maintain Sample and Testing Requirements

Materials | Sample and Testing

Item: 00205 Spec Year: 2003 Item System Unit: E Item Unit: TON

Desc. 1: CL3 ASPH BASE 1.50D PG64-22

Desc. 2:

Material Code: 60075 PERFORMANCE-GRADED ASPHALT BIND PG 64-22

Conversion Factor: 1.00000  Approved Source Required

Special Instruction:

The Maintain Sample and Testing Requirements Window - Materials Folder Tab  
**Figure 2-6**

### KYTC SiteManager Field Definitions

| Field Label               | KYTC Population Policy & Procedure  |
|---------------------------|---|
| Item                      | Displays the unique identifying code for the bid item from the Item Master.   |
| Spec Year                 | Displays the specification year for the bid item.   |
| Item System Unit          | Displays whether the units of measure are English or Metric.  |
| Item Unit                 | Displays the unit of measure for the bid item.  |
| Description (Lines 1&2)   | Displays a description of the selected bid item from the Item Master.   |
| Material Code             | Select the Material Code associated to the Item code.   |
| Conversion Factor         | Displays the Conversion Factor for the material.  |
| Approved Source Indicator | 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. Select as applicable.  |
| Special Instructions      | <p>This field is a freeform text field intended for the user to type special instruction specific to the bid item to material relationship. The value, if any, will be passed to the Contract Sampling and Testing Requirements window.</p> <ul style="list-style-type: none"> <li>- In KYTC this field should include the defaults for how the conversion factor was determined, special instructions for sampling, and whether or not the Contract should be referenced for specific details.</li> <li>- Instructions on how to modify the conversion factor if precast concrete material is used should also be listed in Special Instructions.</li> </ul> |

The Materials Folder Tab Fields Table

**Table 2-6**



Policy and Procedure

In KYTC, the SiteManager System Administrator will maintain the data in the Sampling and Testing Requirements window. Submit all requests for new Bid Item Code and Material Code associations or modifications of existing Bid Item Code and Material Code associations and their corresponding sampling and testing requirements to the SiteManager System Administrator on the Sampling and Testing Requirements Request Form.



## Exercise 2-6

In this exercise, you will learn how to view a material code on a bid item.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Material Information** panel, double-click the **Sampling and Testing Requirements** icon. The Maintain Sampling and Testing Requirements window appears.
2. In the **Item** list box, scroll to and double-click **00205, English, 2003, CL3 ASPH BASE 1.50D PG64-22**.
3. In the **Material Code** list box, scroll to and double-click **60075, PERFORMANCE-GRADED ASPHALT BIND PG 64-22**.
4. What is the conversion factor? 1.0

Now, prepare for the next exercise.

5. Click the **Sample and Testing** folder tab.

## Viewing the Sampling and Testing Requirements for a Bid Item Material

Use the Sample and Testing tab to view a material's sample and testing requirements for a given bid item. Use the top portion of the tab to pick which of the sets of detail to be viewed. Use the bottom portion to view the information.

The frequency of testing is the rate at which a sample must be collected. It is based on the quantity of bid item installed at job site and is indicated using the Rate and Frequency fields.

| Sample Type        | Acceptance Method | Test Method               |
|--------------------|-------------------|---------------------------|
| PROJECT ACCEPTANCE | TEST RESULTS      | MASS CHANGE (PG BINDER)   |
| PROJECT ACCEPTANCE | TEST RESULTS      | ORIGINAL DYNAMIC SHEAR    |
| PROJECT ACCEPTANCE | TEST RESULTS      | PRESSURE AGING VESSEL DY  |
| PROJECT ACCEPTANCE | TEST RESULTS      | BENDING BEAM RHEOMETER    |
| PROJECT ACCEPTANCE | TEST RESULTS      | BENDING BEAN RHEOMETER    |
| PROJECT ACCEPTANCE | TEST RESULTS      | ROLLING THIN FILM OVEN DY |

The Sample and Testing Tab

Figure 2-7

### **KYTC SiteManager Field Definitions**

| <b>Field Label</b>    | <b>KYTC Population Policy &amp; Procedure</b>  |
|-----------------------|--|
| Sample Type           | Identifies the type of the test to be performed on the material for the associated bid item. Select the Sample Type.<br><ul style="list-style-type: none"> <li>- Refer to the paragraph below for the specific combinations of Sample Type and Acceptance Method allowed in KYTC. This is a required field.</li> </ul> |
| Acceptance Method     | Identifies how the material will be accepted on the contract. Select the Acceptance Method.<br><ul style="list-style-type: none"> <li>- Refer to the paragraph below for the specific combinations of Sample Type and Acceptance Method allowed in KYTC. This is a required field.</li> </ul>                          |
| Test Method           | Unique identifier of test template that will be used to capture the test data. A full description of the test to be completed will display to the right of the Test Method field. Select the Test Method. This is a required field.  |
| Sample Location       | Wherever the Sample Location is available, it should be entered. Selections include Job Site, Plant, and Manufacturer.   |
| Sample Frequency      | The rate at which a sample must be collected. Enter the Sample Frequency.  |
| Sample Size           | This field indicates the minimum sample quantity to be collected. Wherever the Sample Size is available, it should be entered.   |
| Sample Unit           | The unit of the sample size. Wherever the Sample Unit is available, it should be entered.  |
| Sample Responsibility | The sample responsibility should be indicated as either State or Contractor. This is a required field.   |
| Test Responsibility   | The test responsibility should be indicated as either State or Contractor. This is a required field.   |

The Maintain Sample and Testing Requirements Window -  
 Sample and Testing Folder Tab - Field Descriptions

**Table 2-7**



Policy and Procedure

In KYTC, the System Administrator will enter S&T Requirements in accordance with the field table definitions that follow. The System Administrator will also record additional comments regarding assumptions made in determining the Conversion Factor and/or frequency in the Remarks bubble.

Use Sample Types and Acceptance Methods in determining S&T Requirements as defined by the following:

- **Verification** – Verification should be chosen as a Sample Type for materials that are sampled for the purpose of retesting questionable material (e.g., 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 an 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.



## Exercise 2-7

In this exercise, you will learn how to view the sampling and testing requirements of a material for a bid item.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the Sample and Testing tab, select test **PRESSURE AGING VESSEL DYNAMIC SHEAR, LAPAV\_DSR** in the top data window.
2. What is the **Sample Type** for this test? Project Acceptance
3. What is the **Acceptance Method** for this test? Test Results
4. What is the required **Frequency** of testing? 1 per 6,500
5. On the toolbar, click the **Close** button.
6. Open **Internet Explorer**.
7. Enter the following **URL**  
<http://kytct00d03/businessobjects/enterprisell5/InfoView/logon.aspx>



*Hint: This URL is case sensitive. If you have trouble, make sure to check the case of each character. You may want to add this URL to your favorites.*

Enter the following Information to log into the KYTC  
KYTC has assigned Usernames and passwords  
train1....train18 for training purposes

The instructor will assign you your UserID.  
Crystal Report Site:  
System: **kytct00d03**  
Username: **train#**  
Password: **train#**  
Authentication: Enterprise

8. In the left pane window, Click on the **Public folder\training\materials\sampling and testing**. The main window pane will display a list of reports.
9. Select the **Sampling Checklist** report.

You can navigate through the report by using the following Crystal Report Navigation buttons.



10. **Close** Internet Explorer.

## Review for Section 2

To view a material description:

1. On the **Material Information** panel, double-click the **Material Detail** icon.
2. Click the **Open** button.
3. In the list box, scroll to and click the desired material code.
4. Click **OK**.

To view a material test:

1. On the **Material Information** panel, double-click the **Material Detail** icon.
2. Click the **Open** button.
3. In the list box, scroll to and click the desired **Material Code**.
4. Click **OK**.
5. Click the **Tests** folder tab.

To view a material test specification:

1. On the **Material Information** panel, double-click the **Material Detail** icon.
2. Open a material description.
3. Click the **Tests** folder tab.
4. Click the desired test (except one of the standardized tests).
5. Click the **Services** menu and click the **Material Specifications** choice.

To view a material gradation:

1. On the **Material Information** panel, double-click the **Material Detail** icon.
2. Open a material description.
3. Click the **Gradations** folder tab.

4. In the upper data window, click the correct material gradation effective date.

To view a material code on a bid item:

1. On the **Materials Information** or **Sampling and Testing** panel, double-click the **Sampling and Testing Requirements** icon.
2. Click the **Open** button.
3. In the **Item** list box, scroll to and double-click the desired choice.
4. In the **Material** list box, scroll to and click the desired choice.
5. Click **OK**.

To view sampling and testing requirements of the material for a bid item:

1. On the **Materials Information** or **Sampling and Testing** panel, double-click the **Sampling and Testing Requirements** icon.
2. Click the **Open** button on the **Material** folder tab.
3. In the **Item** list box, scroll to and double-click the desired choice.
4. In the **Material** list box, scroll to and double-click the desired choice.
5. Click the **Sample and Testing** folder tab.



## Summary Exercise for Section 2

In this exercise you will view base materials data.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Navigate to the **Material Detail** window.
2. Open Material Code **10045, AGG - #57**.
3. What is the minimum range value for the 1/2-inch (12.5 mm) sieve?  
25
4. Navigate to the **Sampling and Testing Requirements** window.
5. Open Item **00205, E, 2003, CL ASPH BASE 1.5 PG64-22** and Material Code **10290**.
6. What is the conversion factor? 1.0
7. What is the sample frequency for test method AGFINEQUAL?  
1 per 50,000
8. Continue to review this section and open items/materials to satisfy your curiosities about the items/materials you work with most.
9. Navigate to the main **Materials Management** panel.





Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## **Section 3 Contract Materials**

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By the end of this learning module, you will be able to do the following:

View the KYTC Outstanding Item List

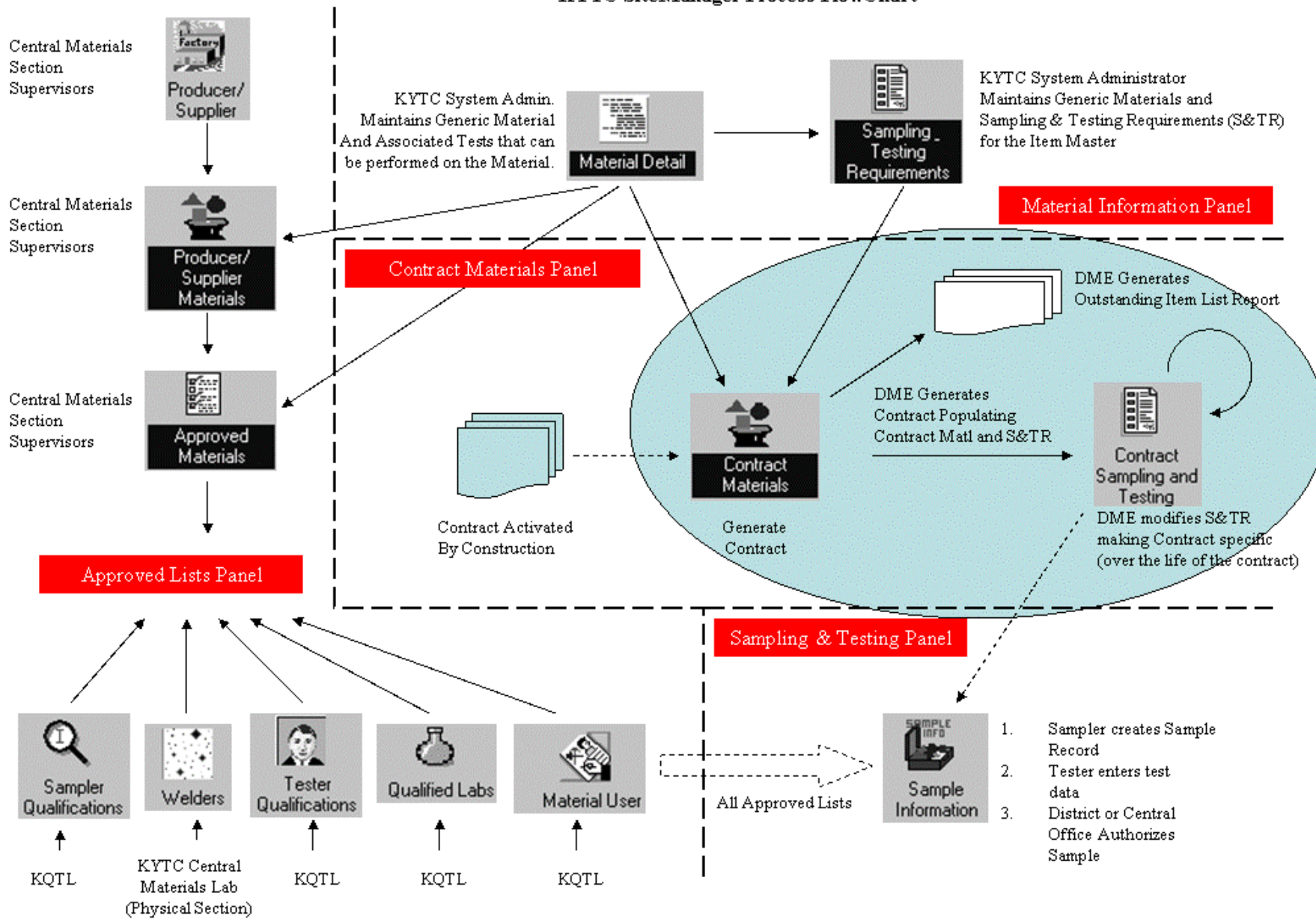
Generate Contract Materials

Modify Contract Sampling and Testing Requirements

View the Source Material Custom Report

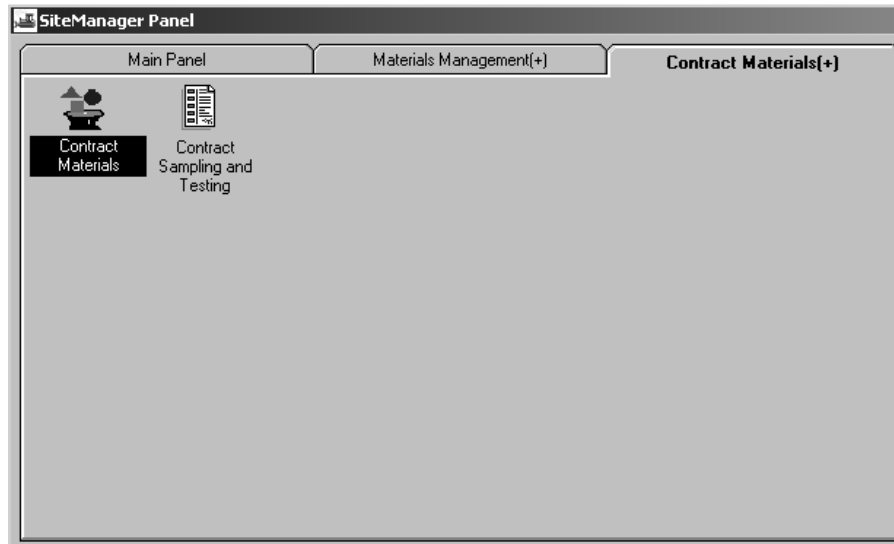
# Contract Materials

## KYTC SiteManager Process FlowChart



## Contract Materials

After a contract has been activated in SiteManager, the Contract Materials component provides for the automatic creation of material associations to items, Sampling and Testing Requirements for those materials, and the generation of an Outstanding Item List for a selected contract. The Outstanding Item List identifies the items on the contract that do not have defined Sampling and Testing Requirements and should be examined before generating materials. KYTC has developed a KYTC Custom Outstanding Item report using Crystal Reports. You will view the KYTC Outstanding Item list in Exercise 3-2.



The Contract Materials Panel  
**Figure 3-1**



### Exercise 3-1

In the following exercise, you will navigate to the Contract Materials panel.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the **Materials Management** panel, double-click the **Contract Materials** icon.

## Viewing the Outstanding Item List

The Contract Materials Services option Outstanding Item List window prints the SiteManager Outstanding Item List directly on the default printer for the selected contract. The Outstanding Item List will display a list of items associated with the selected contract that do not have defined sampling and testing requirements. The Outstanding Item List should be examined before generating materials.



*KYTC will not be using the standard SiteManager Outstanding Item List report. Instead, KYTC will be using a custom report designed to meet your specific needs. The standard SiteManager Outstanding Item List Report is only available prior to Contract Generation. The KYTC Custom Outstanding Item List Report can be generated at any time. You may find it useful to run this report after change orders to ensure all of the materials are currently in SiteManager. You will view the KYTC custom report in Exercise 3-2.*

| Contract ID | Fed St/Prov Pj Nbr                                | Status |
|-------------|---|--------|
| 010707      | APD 119-2 (69)                                    | Active |
| PIKE        | ZEBULON TO BENT MOUNTAIN-JOHNS CREEK ROAD         |        |
| 010764      | FD04 005 0068 010-013                             | Active |
| BARREN      | CONSTRUCTION SECTION TWO FROM KY90 NORTH OF GLASI |        |
| 010797      | STPM 8764 (10)                                    | Active |
| JEFFERSON   | FROM OUTER LOOP TO SOUTHSIDE DRIVE                |        |
| 010801      | DPR-STPR 025 (003)                                | Active |
| LARUE       | RECONSTRUCT FROM MORNING STAR ROAD 1618 AT HODGE  |        |

The Contract Materials Window

Figure 3-2

### KYTC SiteManager Field Definitions

| Field Name          | KYTC Population Policy & Procedure                              |
|---------------------|---|
| Contract ID         | This field is auto populated with the Contract ID.              |
| Fed St/Prov Prj Nbr | This field is auto populated with the Project Number.           |
| Status              | This field is auto populated with the Status of the Contract.   |
| Primary County      | This field is auto populated with the Primary County.           |
| Location            | This field is auto populated with the contract's work location. |

The Contract Materials Window Fields Table  
**Table 3-1**



Policy and Procedure

### **KYTC Procedure**

After contract activation, the DME is responsible for generating the Outstanding Item List report and reviewing it for any item that should have material sampling and testing requirements defined for it. For any item identified during the review, the DME will contact the Materials Administrator to have them add the material at the global level. Once all outstanding item issues have been resolved, the DME will generate Contract Materials.

The DME may generate materials without resolving outstanding item issues for lump sum or design built projects. In those cases, the DME will define the necessary sampling and testing requirements manually in the Contract Sample and Testing window.



*FYI – KYTC Legacy Policy: For “legacy” contracts that are already in SiteManager as part of the Construction implementation, the DME will be responsible for generating materials for these contracts prior to the project being closed.*



## Exercise 3-2

In the following exercise, you will view the Outstanding Item List for Contract AP001.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Double-click the **Contract Materials** icon.
2. In the **Contracts** list box, scroll to and click the Contract **AP001**.
3. Click the **Services** menu.
4. What are the **Services** menu options?

Process Status, Generate, Outstanding Item List



*Reminder, the Outstanding Item List report located on the toolbar under the Services option is the SiteManager standard report.*

5. Open **Internet Explorer**.
6. Enter the following **URL**  
<http://kytct00d03/businessobjects/enterprise115/InfoView/logon/.aspx>



*Reminder, this URL is case sensitive*

System: kytct00d03  
Username: train#  
Password: pass#  
Authentication: Enterprise

7. In the left pane window, Click on the **Public folder\training\materials\contract materials** folder. The main window pane will display a list of reports.
8. Select the **Outstanding Item List** report.

You can navigate through the report by using the following Crystal Report Navigation buttons.



9. Close **Internet Explorer**.





Policy and Procedure

KYTC is creating a Custom Outstanding Item List report. The report should be blank, meaning all of the Items and Materials on the contract exist in SiteManager. If the Report list items, the System Administrator should be notified that this is a new item in SiteManager. The System Administrator will then add the item into SiteManager and notify the DME when to proceed with contract generation.

### Generating Contract Materials

The Contract Materials window associates sampling and testing requirements to a contract through the contract materials generation process. Through the Material Generation process, SiteManager generates contract sampling and testing requirements by associating materials and their corresponding sampling and testing requirements with the bid items on the contract. This association is based on the Sampling and Testing Requirements outlined in the Sampling and Testing Requirements window. A notice of the generation is sent to the Project Manager via an In-Box message. The Generate Materials process cannot be reversed - materials may be generated only once for each contract. After the process is complete, contract specific sampling and testing requirements modifications may be completed on the Contract Sampling and Testing component.

### KYTC SiteManager Field Definitions

| Services              | KYTC Population Policy & Procedure  |
|-----------------------|---|
| Generate              | <p>The generate process automatically associates all sampling and testing requirements defined at the global level with the materials for items on the selected contract.</p> <p>The DME will generate materials after all outstanding item issues have been resolved. DME may generate materials without resolving outstanding item issues if it is time sensitive. In that case he/she will create the missing S&amp;T requirements manually in the Contract S&amp;T window.</p>  |
| Outstanding Item List | <p>The Outstanding Item List provides a list of all the items with associated materials for the selected contract that do NOT have sampling and testing requirements defined at the global level. This report automatically prints to the user's default printer when generated and cannot be viewed on line.</p> <p>The DME is responsible for generating the Outstanding Item List report and checking for any items that should have materials S&amp;T requirements.</p> <p>For any item that needs global S&amp;T requirements defined, the DME will contact the Materials Administrator to have the S&amp;T requirements set up.</p> <p>When a new item is added to the Item Master list in PES/LAS, the P/L Administrator will notify the Materials Administrator. The Materials Administrator will setup global S&amp;T requirements for the new item.</p> |

Available Actions from the Services Option

**Table 3-2**



### Exercise 3-3

In the following exercise, you will generate Contract Materials for Contract AP001.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the **Contract Materials** window, scroll to and click the Contract **AP001**.
2. What action should you perform before **Generating** a Contract?  
Run the KYTC Outstanding Item List report
3. Select **Generate** from the **Services** menu.
4. Click the **Close** button on the toolbar.

## Modifying Contract Sample and Testing Requirements

After the Generate Contract Materials process is complete, sampling and testing requirements may be modified through the Contract Sampling and Testing icon. This icon provides the ability to make changes to materials contained within a contract line item and the contract sampling and testing requirements for that material. This may include conversion factor or producer/supplier changes, testing requirement modifications, or material substitutions. Contract Sample and Testing Requirements may change throughout the life of the contract.

If an estimate is generated before materials are generated, no testing discrepancies will occur on the estimate. It will appear as if all Sampling and Testing requirements were met. For this reason materials must be generated prior to the first estimate.

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. Contract Sample and Testing Requirements for items added via change order will be modified throughout the life of the contract by the DME through this window.



Policy and Procedure

## KYTC 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. 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 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.

### Modifying Bid Item Materials

The Materials folder tab details the material to bid item association, including specification of the conversion factor, indication if an approved source is required and outlined special instructions for modifying the relationship. It also displays the material quantity for the bid item on the Contract/Project. If necessary, the Material can also be viewed from this window.

The Materials Folder Tab  
**Figure 3-3**

### 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.

#### KYTC SiteManager Field Definitions

| 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. |

| Field Name               | KYTC Population Policy & Procedure  |
|--------------------------|---|
| 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.<br>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.<br>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.  |
| 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.<br>NOTE: This field will be included in a custom "Sampling Checklist" report.   |

The Materials Folder Tab Fields Table  
**Table 3-3**



Policy and Procedure

## KYTC Procedures

### 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.

### **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*

### **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.

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



*NOTE: 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.*

The following is an example of adjusting the conversion factor.

**Conversion Factor Adjustment (EXAMPLE)**

Bid Item – Class A Concrete                      Quantity – 250cy

In this example, the contractor has decided to use two Class A concrete mixes and to also use 30 precast headwalls. For this project the headwalls require 0.5cy of concrete for each headwall.

The contractor will be using

- 100cy of Class A concrete with straight type I cement and #68 coarse aggregate
- 135cy of Class A concrete with Class F Fly Ash and #57 coarse aggregate
- 30 precast headwalls (15cy)

| <i>Materials Code Descriptions</i> | <i>Conversion Factor (default)</i> | <i>Conversion factor (adjusted)</i> |
|------------------------------------|------------------------------------|-------------------------------------|
| Class A Conc                       | 1.0                                | 0.94                                |
| Class A Conc Mix Dsgn              | 1.0                                |                                     |
| Conc Agg 57                        | 1.0                                | 0.54                                |
| Conc Agg 67                        | 0.0                                |                                     |
| Conc Agg 68                        | 0.0                                | 0.40                                |
| Conc Agg 78                        | 0.0                                |                                     |
| Cement Type I                      | 1.0                                | 0.94                                |
| Cement Type II                     | 0.0                                |                                     |
| Cement Type III                    | 0.0                                |                                     |
| Class C Fly Ash                    | 0.0                                |                                     |
| Class F Fly Ash                    | 0.0                                | 0.54                                |
| Microsilica                        | 0.0                                |                                     |
| Misc Precast                       | 0.0                                | 1.0                                 |
| Etc.....                           | 0.0                                |                                     |
| Etc.....                           | 0.0                                |                                     |

### **Conversion Factor Adjustment for Class A Conc**

Since the entire quantity of the bid item will not be cast-in-place, the Class A should be adjusted.

$$\begin{aligned} &250\text{cy (bid item)} \\ &\underline{-15\text{cy (not used because of the precast headwalls)}} \\ &235\text{cy (cast-in-place)} \\ \text{Conversion Factor (CF)} &= \frac{235\text{cy (cast-in-place)}}{250\text{cy (bid item)}} = 0.94 \end{aligned}$$

### **Conversion Factor Adjustment for Class A Conc Mix Design**

The CF for Class A Conc Mix Design should be left at 1.0 since they are using Class A concrete. If the contractor had used precast products for the entire bid item, the CF for the Mix Design would be 0.0 (indicating that Class A concrete was not used).

### **Conversion Factor Adjustment for # 57 Aggregate**

Since #57 aggregate is only used in 135cy of the cast-in-place concrete the CF should be adjusted.

$$\text{CF} = \frac{135\text{cy (cast-in-place)}}{250\text{cy (bid item)}} = 0.54$$

### **Conversion Factor Adjustment for # 68 Aggregate**

Since #68 aggregate is only used in 100cy of the cast-in-place concrete the CF should be adjusted.

$$\text{CF} = \frac{100\text{cy (cast-in-place)}}{250\text{cy (bid item)}} = 0.40$$

### **Conversion Factor Adjustment for Class F Fly Ash**

Since Class F Fly Ash is only used in 135cy of the cast-in-place concrete the CF should be adjusted.

$$\text{CF} = \frac{135\text{cy (cast-in-place)}}{250\text{cy (bid item)}} = 0.54$$

### **Conversion Factor (CF) Adjustment for Miscellaneous Precast**

Since the contractor is using some precast items for this bid item, the CF of the Misc Precast material code should be changed to 1.0. On this item, the rate/frequency is 1/9,999,999 (this indicates 1 per project). The CF of 1.0 shows that the material was used and the 1/9,999,999 triggers a sampling and testing reminder that the Sampling Manual needs to be checked for sampling requirements. If this material requires more than one SiteManager entry, additional tests should be added to this material for each sample/certification required.

### **Conversion Factor Adjustments for Other Materials on the Bid Item**

Additional items/materials on the bid item should also be adjusted using the above examples as a guide.



### Exercise 3-4

In the following exercise, you will view a material code for a bid item on Contract AP001.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Materials Management** panel, double-click the **Contract Materials** Icon.
2. On the **Contract Materials** panel, double-click the **Contract Sampling and Testing** icon.
3. In the Contract list box, scroll to and double-click the **Contract AP001**.
4. In the Project/Line Item list box, scroll to and double-click the Project **Z081106504B2, Line Item 0360, CL1 ASPH SURF 0.38D PG64-22**.
5. How many materials are listed on this item? Twenty-one
6. In the Material list box, scroll to and double-click the **Material Code 60075**.
7. What is the **Material Unit** of measure of this item?  
Gallons
8. What is the **Conversion factor**? 1.0
9. What is the **Material Quantity**? 227
10. Click the **Sample & Testing** folder tab.



## Modifying Contract Sample and Testing Requirements

The Sample and Testing tab allows the modification of a materials sample and testing information for a given bid item. The top portion of the tab allows the user to pick which of the sets of details need to be edited. The bottom portion allows the user to edit the information. Any changes made in the bottom portion of the window will be automatically reflected in the top portion.

**Contract Sample and Testing Requirements**

Materials | **Sample and Testing**

Contract: AP001 Project: Z081106504B2 Bid Item Code: 00300 Item Unit: TON  
 Material: 60075 Material Desc.: PERFORMANCE-GRADED ASPHALT BIND PG 64-22

Desc. 1: CL1 ASPH SURF 0.38D PG64-22  
 Desc. 2:  
 Supp Desc1:  
 Supp Desc2:

| Producer Supplier Code | Sample Type        | Acceptance method | Test Method |
|------------------------|--------------------|-------------------|-------------|
|                        | PROJECT ACCEPTANCE | TEST RESULTS      | LA%_CHANGE  |
|                        | PROJECT ACCEPTANCE | TEST RESULTS      | LAORIG_DSR  |
|                        | PROJECT ACCEPTANCE | TEST RESULTS      | LAPAV_DSR   |
|                        | PROJECT ACCEPTANCE | TEST RESULTS      | LAPG_STIFF  |

Producer Supplier Code:   
 Sample Type: PROJECT ACCEPTANCE  
 Acceptance Method: TEST RESULTS  
 Test Method: LA%\_CHANGE MASS CHANGE (PG BINDER)

Sample Location: PLANT  
 Sample Units: TONS  
 Sample Responsibility: CONTRACTOR  
 Test Responsibility: STATE

Rate: 1  
 Samples per.: 6,500.000  
 Sample Size: 21-QT CAN

The Contract Sample and Testing Folder Tab  
**Figure 3-4**

### KYTC SiteManager Field Definitions

| 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 not 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.<br>For IAS requirements, the Sample Type will be "INDEPENDENT ASSURANCE SAMPLE".   |
| Acceptance Method                        | This field may not be modified.<br>For IAS requirements, the Acceptance Method will be 'TEST RESULTS'.   |
| Test Method                              | This field may not be modified.<br>For IAS requirements, the Test Method will be added for each IAS requirement.   |
| Sample Location                          | This field may not be modified.  |
| Sample Frequency and Rate                | This field may not be modified.<br>For IAS requirements, the Rate will be '1' and the Frequency will be determined as per IAS requirements for that material.  |
| Sample Size                              | This field may not be modified.  |
| Sample Unit                              | This field may not be modified.  |
| Sample Responsibility                    | This field may not be modified.<br>If CONTRACTOR is chosen, user will log comment in the remarks bubble of the Sample Information window regarding the specific type of <i>consultant</i> or <i>other agency</i> that took the sample.<br>For IAS requirements, the Sample Responsibility will be 'STATE'. |
| Test Responsibility                      | This field may not be modified.<br>If CONTRACTOR is chosen, user will log comment in the remarks bubble of the Sample Information window regarding the specific type of <i>consultant</i> that tested the sample.<br>For IAS requirements, the Test Responsibility will be 'STATE'.                        |

The Contract Sample and Testing Folder Tab Fields Table  
**Table 3-4**



Policy and Procedure

## KYTC Procedure

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 of retesting questionable material (example: Verification samples). Verification should NOT be set up as a 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 Methods 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 towards 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 for 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 that are 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 that are sampled for the purpose of Contractor’s Quality Control Testing. A possible Acceptance Method is Test Results



### Exercise 3-5

In the following exercise, you will view sampling and testing requirements of a material for a bid item on Contract AP001.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. What tests are required on this material?  
LA%\_CHANGE, LAORIG\_DSR, LAPAV\_DSR, LAPG\_STIFF, LAPGMVALUE, LARTFO\_DSR
2. **Click** the row for Test Method **LAORIG\_DSR**.
3. What is the testing frequency? 1 to 6,500
4. Who is responsible for taking the sample? Contractor
5. **Click** the **Materials** folder tab.



### Exercise 3-6

In the following exercise, you will delete a test for a material requiring a QA test.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Click the **Materials** tab.
2. Click the **Open** button.
3. Click the **Project/Line** Item button.
4. Select Project Number **Z081106504B2**, Line Item **0410, STRUCTURE EXCAV-SOLID ROCK**.
5. Select Material Code **51200-ROCK CONSTRUCTION**.
6. Click the **Sample and Testing** tab.
7. For the purpose of this Contract, we will be performing a QA test. Highlight Sample Type **Project Acceptance**.
8. Click the **Delete** icon located on the toolbar to delete this test method.
9. Click the **Yes** button when asked “Do you wish to delete this Sampling and Testing Requirement?”
10. Select Sample Type **QC**.
11. Click the **Delete** icon located on the toolbar to delete this test method.
12. Click the **Yes** button when asked “Do you wish to delete this Sampling and Testing Requirement?”
13. Click the **Save** button located on the toolbar.
14. Click the **Close** icon located on the toolbar.

## Review for Section 3

To generate the Contract materials:

1. On the **Contract Materials** panel, double-click the **Contract Materials** icon.
2. In the **Contracts** list box, scroll to and click the desired contract.
3. Click **Services**.
4. Click the **Generate** choice.
5. Click the **Close** button.

To modify a material code for a bid item:

1. On the **Contract Materials** panel, double-click the **Contract Sampling and Testing** icon.
2. In the list box, scroll to and double-click the desired **Contract**.
3. In the list box, scroll to and double-click the desired **Project/Line Item**.
4. In the list box, scroll to and click the desired **Material**.
5. Click **Ok**.
6. In the **Conversion Factor** field, type desired value.
7. If desired, click the **Approved Source Required** check box (ON).
8. In the **Special Instructions** field type in instructions regarding proper sampling.
9. Click the **Save** button.

To modify sampling and testing requirements of the material for a bid item:

1. On the **Contract Materials** panel, double-click the **Contract Sampling and Testing** icon.
2. Open a material for a bid item.
3. Click the **Sample and Testing** folder tab.
4. In the list at the top of the window, click the desired sampling and testing requirement record.
5. In the **Sample Location** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
6. Click the **Save** button.

## Summary Exercise for Section 3

In the following exercise, you will perform Contract Materials maintenance activities for Contract AP002. Participants are logged on using the **sfoster**.

1. Navigate to **Contract Materials**.
2. Generate the Contract Materials for **Contract AP003** (in production, you will run the Outstanding Item List report prior to generation).
3. Open the **Contract Sampling and Testing Requirements** for Contract AP002, the Project Z081106504B2, Line Item 350, CL1 ASPH BASE 0.75D PG64-22, Material Code 10310-ASPH AGG-FINE.
4. What is the **Conversion Factor**? 1.0
5. What is the **Material Quantity**? 665
6. What tests are required? AGFINEQUAL, AGSANDEQUL
7. What is the frequency of the required test? 1 per 50,000 and 1 per 10,000
8. Navigate to the **Materials Management** panel.

## Questions and Answers

1. **Question.** Why would items appear on the KYTC Outstanding Item List report?

**Answer.** One reason an item may appear on the report would be because it is a new item in the Item Master List added at the request of Construction Procurement PS&E Section, but the sampling and testing requirements have not been defined in the SiteManager generic Sampling and Testing requirements window.

2. **Question.** I generated a contract in the Contract Materials window. A Change Order added new items to the contract. I went back to regenerate the contract, but it did not appear in the list. How do I add the Sampling and Testing requirements?

**Answer.** The contract will disappear from the Contract Materials window after the contract has been generated. During the contract generation process, SiteManager merges contract specific item information and generic item sampling and testing requirements into a SiteManager database table that contains this combined information. If SiteManager allowed a user to generate a contract multiple times, this particular database table would contain duplicated information which would result in unreliable data. Contact the SiteManager Administrator to add the new item into the SiteManager System, if it has not been added to the generic Material Sampling and Testing Requirements. Once the generic Sampling and Testing requirements are defined in the system, the contract specific Sampling and Testing requirements can be added manually in the Contract Sampling and Testing window.

3. **Question.** Will the DME be the only role able to determine the necessary tests in the Contract Sampling and Testing Requirements?

**Answer.** No, the DME and some personnel in the Central Office will be able to add or remove tests in the Contract Sampling and Testing window.

4. **Question.** What should be done in the case that a tester could not perform a test due to testing equipment malfunction? Should the test be deleted in the Contract and Sampling window?

**Answer.** No, leave the test, but add remarks that the machine was down and you couldn't perform the test. If the test was removed, there would not be a record describing why the test was not completed.

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Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## Section 4 Sampling and Testing

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By the end of this learning module, you will be able to do the following:

Enter Sample Information

Enter Additional Sample Data

Associate a Sample with a Contract Item

Enter Other Sample Data

Associate a Sample to a Test

Enter Test Data

Associate Testing Personnel to a Test

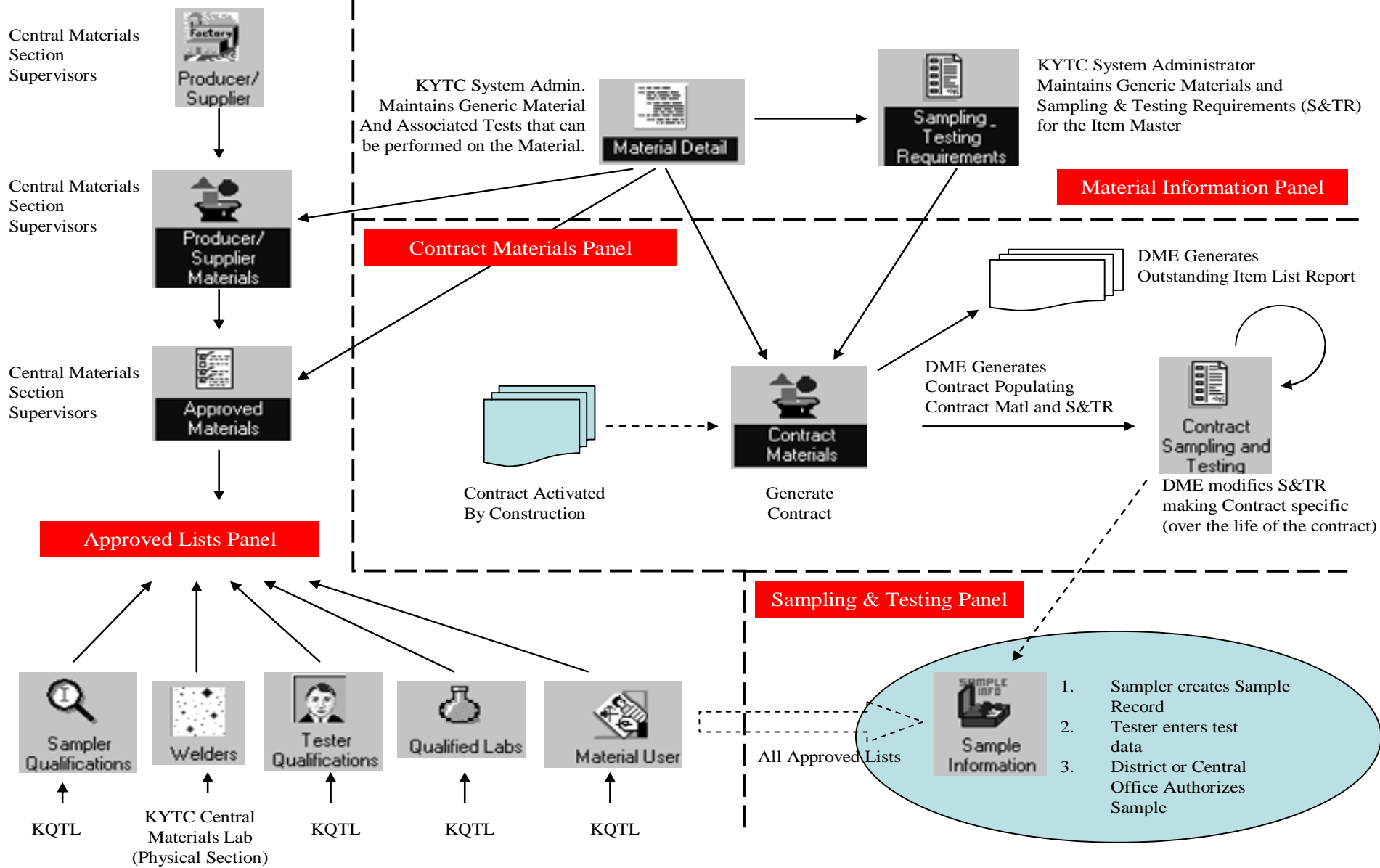
Authorize a Sample

Revise, Copy, and Link a Sample

Access Sampling and Testing Reports

# Sampling and Testing Requirements

## KYTC SiteManager Process FlowChart

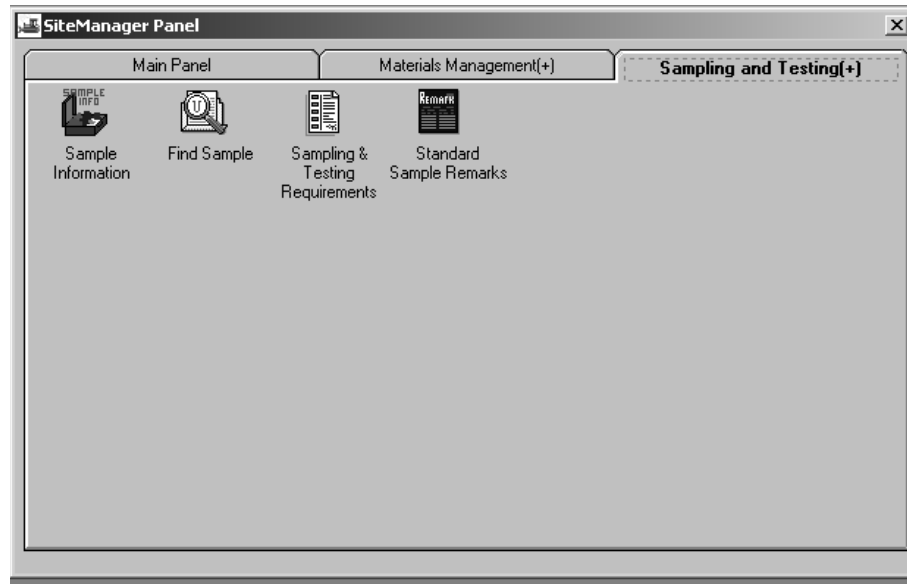


## Sample Information and Entry Tracking

The Sample Information icon allows the addition of base sample data from various geographic areas within the transportation agency.

### Sampling and Testing

Sampling and Testing information is maintained using the components of the Sampling and Testing panel.



The Sampling and Testing Panel

**Figure 4-1**



*The Sampling & Testing Requirements icon is a repeat of the same icon located on the Material Information panel as a convenience to the end user to review the global Sampling and Testing requirements.*

## Basic Sample Data Folder Tab Description

The sampler is responsible for completing the necessary fields as documented in the policy and procedures in the Basic Sample Data folder tab.

The screenshot shows a software window titled "Maintain Sample Information" with a tabbed interface. The "Basic Sample Data" tab is active. The form contains the following fields and values:

|             |                                     |                |              |              |                    |
|-------------|-------------------------------------|----------------|--------------|--------------|--------------------|
| Smpl ID:    | 01312SCF060001                      | Status:        | PENDING      |              |                    |
| Revised By: |                                     | Revising:      |              | Sample Date: | 01/16/06           |
| Link To:    |                                     | Link From:     |              | Log Date:    | 00/00/00           |
| Smpl Type:  | PROJECT ACCEPTANCE                  | Acpt Meth:     | TEST RESULTS |              |                    |
| Material:   | 10455                               | BASE AGG - DGA |              |              |                    |
| Sampler:    | sfoster                             | Stephen Foster |              |              |                    |
| P/S:        | HILLTOP @ BUTLER                    | AGP006401      |              |              |                    |
| Type:       | LMST                                | City:          | Butler       |              |                    |
| Prod Nm:    | DGA LIMESTONE                       |                |              |              |                    |
| Mnfctr:     | HILLTOP @ BUTLER                    | AGP006401      |              |              |                    |
| Town:       |                                     | Geog Area:     | DISTRICT 01  |              |                    |
| Intd Use:   |                                     |                |              |              |                    |
| Repr Qty:   | .000                                | TONS           |              |              |                    |
| Auth By:    |                                     | Auth Date:     | 00/00/00     |              |                    |
| Lock Type:  |                                     | Locked By:     | sfoster      | Lock Date:   | 9/27/2006 14:04:51 |
| Central:    | <input checked="" type="checkbox"/> |                |              |              |                    |

Basic Sample Information Folder Tab  
Figure 4-2

### KYTC SiteManager Field Definitions

| Field Name  | KYTC Population Policy & Procedure   |
|-------------|--|
| Sample ID   | <p>Identifier of the sample record. The Sample ID is manually entered by the Sampler when logging the sample in SiteManager. The Sample ID is 14 characters in most circumstances but may be up to 18 characters long if there are special circumstances in the case of a revised sample or a recheck. Every character of the Sample ID has a specific meaning (i.e. it is "smart" number) and should follow the naming convention of <i>DDCCIIIYY####XXXX</i>. The definition of each character is outlined below.</p> <ul style="list-style-type: none"> <li>- (DD) The district number of where the sample was taken.</li> <li>- (CCC) The crew number of the Sampler.</li> <li>- (III) The 3 letter initials of the Sampler. (Note: Users with only a first and last name should use "X" as their middle initial. Users with more than three names should choose which 3 letters they want to use, but should use the same 3 letters consistently when logging samples).</li> <li>- (YY) The 2-digit year sample was taken.</li> <li>- (####) A 4-digit sequential number that starts with 0001 for each Sampler and then increments sequentially for each sample logged thereafter (i.e. 0001, 0002, 0003, etc.)</li> <li>- (XXXX) The last four characters of the Sample ID should only be entered to indicate special circumstances. RV01 would be used to indicate a revised sample (e.g. RV01 Revised Sample 1<sup>st</sup> time, RV02 Revised Sample 2<sup>nd</sup> time). RK01 would be used to indicate a recheck sample (e.g. RK01 Recheck Sample 1<sup>st</sup> time, RK02 Recheck Sample 2<sup>nd</sup> time).</li> </ul> |
| Status      | <p>Identifies the current status of this record. When logging the sample, the Sampler should select the status of "Pending". Once all tests for the sample are completed, the Project Engineer will select the appropriate sample status before the sample is authorized.</p> <p><u>Notes:</u></p> <ul style="list-style-type: none"> <li>- Only PENDING, COMPLETE, and FAILED will count toward satisfying the sample requirements for a material.</li> <li>- Only COMPLETE, FAILED, and FAILED AND REMOVED FROM PROJECT are acceptable statuses for authorizing a sample.</li> </ul>   |
| Revised by  | <p>This field is auto populated on the <i>original</i> sample record with the User ID of the person who revised the sample record.</p> <p><u>Note:</u></p> <ul style="list-style-type: none"> <li>- This is only relevant when a sample record is revised.</li> <li>- This field is not populated on the <i>revised</i> sample record.</li> </ul>  |
| Revising    | <p>Used when the current sample has been authorized and a revision is being made on a sample record.</p> <p>This field is auto populated with the Sample ID of the original sample record for revised samples only.</p> <p>A sample should only be revised if the original material failed, and a new sample is taken for further testing, or to correct an error/issue on an authorized sample.</p> <p><u>Note:</u></p> <ul style="list-style-type: none"> <li>- If a revised sample record is being revised again, then this field will be populated with the 'revising' Sample ID; not the original Sample ID.</li> </ul>   |
| Sample Date | <p>Enter the actual date the sample was physically taken.</p> <p><u>Note:</u></p> <ul style="list-style-type: none"> <li>- This field is automatically filled in by the system with today's date.</li> </ul>   |

| Field Name                 | KYTC Population Policy & Procedure  |
|----------------------------|---|
| Link To                    | <p>This field is populated by using the look-up function to link the current sample to another sample that already exists in SiteManager. Link samples for the following:</p> <ul style="list-style-type: none"> <li>- IAS samples should be linked to an Acceptance Sample</li> <li>- When additional testing needs to be performed for failing samples, the new sample should be linked to the failing sample</li> <li>- Other situations when applicable.</li> </ul>   |
| Link From                  | <p>This field reflects the opposite relationship as the Linked To field by displaying the ID of the sample that contains this sample in its Linked To field. This field is only auto populated for samples that are linked to another sample in SiteManager.</p>  |
| Log Date                   | <p>Enter the actual date the sample is logged in SiteManager.</p>   |
| Sample Type                | <p>This field identifies the type of sample taken (e.g. Independent Assurance, Project Acceptance). Select the appropriate sample type from the pick-list.</p>  |
| Acceptance Method          | <p>This field identifies the method by which the sample is being accepted (e.g. Certification, Mix Design Approval). Select the appropriate acceptance method from the pick-list.</p>   |
| Material                   | <p>Using the look-up function select the material being sampled and tested.</p>   |
| Sampler                    | <p>Using the look-up function select the Sampler from the list. In the case where the Sampler is not qualified to sample the material or his qualification has not been updated, contact the DME in his office for further action. The ID of the Sampler selected will be displayed.</p>  |
| P/S                        | <p>Using the look-up function select the approved P/S for the material being sampled. In the case where the P/S is not approved or the approval has expired, the sampler will contact the DME in his office for further action.</p>   |
| Type                       | <p>Based on the P/S, this field is auto populated with the Producer/Supplier type code (e.g. CMT for Cement, AGGR for Aggregates – General).</p>  |
| City                       | <p>Based on the P/S, this field is auto populated with the city where the producer/supplier is located according to the Address listed on the Approved List, Producer/Supplier window.</p>  |
| Prod Nm                    | <p>Using the look-up function, select the appropriate product name (brand of material) when available.</p>  |
| Mnfctr                     | <p>Using the look-up function, select the appropriate Manufacturer (i.e. Producer/Supplier) when available.</p> <ul style="list-style-type: none"> <li>- For Aggregate materials from Redistribution Yards, the original source of the material should be selected in the Manufacturer field.</li> </ul> <p><u>Note:</u></p> <ul style="list-style-type: none"> <li>- If the Brand Name is required on the Material Detail window, then after the Product Name is populated the Manufacturer field is auto populated.</li> <li>- If the Brand Name is not required on the Material Detail window, then the Manufacturer field is a search field that only displays the Producer/Suppliers that are approved for that material.</li> </ul> |
| Town                       | <p>Population of this field is optional.</p>  |
| Geog Area                  | <p>Using the pick-list, specify the district where the sample was taken.</p>  |
| Intd Use                   | <p>Enter the intended use of the material.</p>  |
| Represented Quantity       | <p>Per KYTC policy, this field will not be used.</p>  |
| Represented Quantity Units | <p>This field is auto populated with the English Unit of measure for the material sampled.</p>  |

| Field Name | KYTC Population Policy & Procedure  |
|------------|---|
| Auth By    | This field is auto populated with the ID of the person who authorized the sample record.  |
| Auth Date  | This field is auto populated with the date the sample was authorized.<br><u>Note:</u><br>- The system will use the current date when the same is authorized.  |
| Lock Type  | The value for this field determines the access level for updating the sample record. This field will automatically default to the Office Level securities set up for the user.<br>If a sampler from an equivalent other office will be updating the sample record, choose No Lock (e.g. Inspector from one Residency Crew is assigned to another Residency Crew and needs to update the sample record, choose No Lock).<br>For IAS samples, select Limited Access until comparison sample is authorized. After comparison sample is authorized, select No Lock. <ul style="list-style-type: none"> <li>- Office Level One: Central Office (If a sampler's office security is set to the Central Office level, they will be able to update all sample records)</li> <li>- Office Level Two: District (If a sampler's office security is set to the District level, they will be able to update sample records in the same District and all Resident Offices in that District)</li> <li>- Office Level Three: Resident (If a sampler's office security is set to the Resident level, they will be able to update sample records created from others in the same Resident Office)</li> </ul> |
| Locked By  | This field is auto populated with the ID of the person who locked the sample record.  |
| Lock Date  | This field is auto populated with the date and time the sample record was locked.   |

The Basic Sample Information Tab Field Table  
**Table 4-1**



Policy and Procedure

## KYTC Procedure

At KYTC, the person taking the sample (i.e. Sampler) is responsible for logging the sample in SiteManager and completing the necessary fields in each of the folder tabs as documented in the policy and procedures. Once the sample arrives at the appropriate lab for testing the tester is responsible for entering all test data in the required material test templates. Once all tests are complete, the District, Central Office Materials or Resident Engineer reviews the test results, assigns the sample the appropriate status, and authorizes the sample. Mix Designs and all QC/QA Sample Information Records imported into SiteManager through the Applet procedure process, will automatically be Authorized.



### Exercise 4-1

In the following exercise, you will access the Sampling and Testing panel and view an existing sample record.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Materials Management** panel, double-click the **Sampling and Testing** icon.
2. Double-click the **Sample Information** icon.
3. Click the **Open** button.
4. In the **Sample ID** list box, scroll to and double-click Sample ID **01312SCF060001**.
5. What material is this a sample of? 10455-BASE AGG-DGA
6. Click the **Addtl Sample Data** folder tab.



*Notice the INCLUDE STANDARD REMARKS field is checked. Certain reports refer to this checkbox field. If it is checked, the report prints the sample record status (COMPLETE, FAILED, FAILED AND REMOVED FROM PROJECT, PENDING) and standard remarks on the report.*

7. What is the **Station** and **Offset**? 1+00 RIGHT
8. Click the **Contract** folder tab.



*SiteManager has a system parameter that tells SiteManager whether to include the Represented Qty. field in the calculation to determine if the samples taken satisfy Sampling and Testing requirements. KYTC is not using the Represented Qty. field in this calculation. This field is being use for documentation purposes only*

9. Is this sample associated to a contract? Yes



10. Click the **Other** folder tab.



*The Other tab will only be used for testing performed for non-construction types of contract such as Facility Management, Local Government, Maintenance, Miscellaneous, Natural Resources, and Traffic*

11. Click the **Tests** folder tab.

12. How many tests are associated to this sample?     1    

## Entering Sample Information

The Sample Information window is used to track the collection of samples and test data results for both contract and non-contract specific materials.

A screenshot of a software window titled "Maintain Sample Information". The window has five tabs: "Basic Sample Data", "Addtl Sample Data", "Contract", "Other", and "Tests". The "Basic Sample Data" tab is active. The form contains the following fields:

- Smpl ID: 01312V/R060001
- Status: PENDING
- Revised By: (empty)
- Revising: (empty)
- Sample Date: 11/01/06
- Link To: (empty)
- Link From: (empty)
- Log Date: 00/00/00
- Smpl Type: PROJECT ACCEPTANCE
- Acpt Meth: TEST RESULTS
- Material: 10450
- BASE AGG - CSB
- Sampler: sfoster
- Stephen Foster
- P/S: HILLTOP @ BUTLER
- AGP006401
- Type: LMST
- City: No Address Found
- Prod Nm: (empty)
- Mnfctr: (empty)
- Town: (empty)
- Geog Area: DISTRICT 01
- Intd Use: SUBGRADE
- Repr Qty: .000 TONS
- Auth By: (empty)
- Auth Date: 00/00/00
- Lock Type: (empty)
- Locked By: sfoster
- Lock Date: 11/3/2006 13:50:53
- Central:

The Basic Sample Data Folder Tab  
**Figure 4-3**



## Exercise 4-2

In the following exercise, you will create a new sample record.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Click the **Basic Sample Data** folder tab.
2. Click the **New** button.
3. In the **Sample ID** field, enter a valid ID in the following format:  
**DDCCIIIYY####.**



*Remember, **DD** – use your District number. **CCC** – use your Crew number. **III** – Use your initials ALL UPPERCASE. **YY** – Use the current year. **####** - Start each year with the sequence number 0001.*

4. In the **Status** drop-down list, click the expand arrow to the right of the current selection and click **PENDING**.
5. In the **Log Date** field, type **today's date**.
6. In the **Smpl Type** drop-down list, click the expand arrow to the right of the current selection and click **Project Acceptance**.
7. In the **Actp Method** drop-down list, click the expand arrow to the right of the current selection and click **Test Results**.
8. Using the right mouse button, click the **Material** field.
9. From the object menu, click **Search**.
10. In the Search window, double-click Material Code **10450-BASE AGG-CSB**.
11. Using the right mouse button, click the **Sampler** field.
12. From the object menu, click **Search**.
13. In the Search window, double-click Sampler –pick yourself, if you are not in the list, choose **sfoster – Stephen Foster**.
14. Using the right mouse button, click the **P/S** field.
15. From the object menu, click **Search**.
16. In the Search window, double-click Producer/Supplier Code **AGP006401 – HILLTOP@BUTLER**.
17. In the **Geog Area** drop-down list, click the expand arrow to the right and click **DISTRICT 01**.
18. In the **Intd Use** field, enter **SUBGRADE**.



*When entering data in a freeform textbox, make sure to always enter the text in uppercase. Database searches are case sensitive and reports look for specific values in freeform text fields. Mix case text may cause reports to appear incomplete because they will not retrieve data correctly.*

19. Click the **Save** button.

## A Discussion on Sample Security

A facility to lock the sample is available. When a sample is locked, only the user(s) with access will be allowed to edit the sample information, including authorizing the sample. All users without access will have inquiry only access. The sample can be locked at the following levels:

- A. No Lock – The sample with this security option will be open for changes from any users with update window rights.
- B. Office Level – Allows update access to the sample to the specified office and to the users from all the office levels in the chain above the specified office level.

KYTC Office Levels are:

- Level 1 Central
- Level 2 District
- Level 3 Resident

This field will automatically default to the Office Level.

If a sampler from an equivalent office will be updating the sample record, choose No Lock. For example, if inspector from one Residency Crew is assigned to another Residency Crew and needs to update the Sample Record, select No Lock.

For IAS samples, select Limited Access until the comparison sample is authorized. This will limit users who are assigned to the IAS group to view, edit or authorize the sample. Users not in the IAS group will not be able to Link to this sample.

## Entering Additional Sample Data

The Additional Sample Data folder tab on the Sample Information window in SiteManager provides an opportunity for the user completing the sample record to provide further details regarding the sample record.

The screenshot shows a software interface with five tabs: 'Basic Sample Data', 'Addtl Sample Data', 'Contract', 'Other', and 'Tests'. The 'Addtl Sample Data' tab is active. The form contains the following fields:

- Smpl ID: 01312VXR060001
- Buy American:
- Request By: [text field]
- Witnessed By: [text field]
- Smpl Size: [text field]
- Dist from Grade: [text field]
- Station: 1+00
- Offset: RIGHT
- Reference: [text field]
- Smpl From: [text field]
- Smpl Origin: [text field]
- Control Type: [dropdown menu]
- Cntrl Number: [text field]
- Seal Number: [text field]
- Design Type: [dropdown menu]
- Mix ID: [text field]
- Plant ID: [text field]
- Plant Type: [text field]
- Creator User ID: sfoster
- Include Standard Remarks:
- Last Modified User ID: sfoster
- Last Modified Date: 11/01/06

The Additional Sample Data Folder Tab  
**Figure 4-4**

### KYTC SiteManager Field Definitions

| Field Name                    | KYTC Population Policy & Procedure  |
|-------------------------------|---|
| Smpl ID                       | This field is auto populated with the Sample ID.  |
| Buy American (check box)      | This field identifies if the material sampled fulfills the requirement for the Buy USA program. Select the checkbox based on contract specifications; otherwise it should be left blank.  |
| Buy American (drop-down list) | Per KYTC policy, this field will not be used  |
| Reqst By                      | Population of this field is optional.   |
| Witnessed By                  | Population of this field is optional, except when KYTC witnesses IAS, Liquid Asphalt, and QC samples.   |
| Smpl Size                     | Population of this field is optional. The Sampler may populate this field to indicate the sample size particularly for a sample that has more than one unit (e.g. 2 cans).  |
| Smpl Size - Units             | If the Sample Size field is populated, populate the sample unit.  |
| Dist from Grade               | Per KYTC policy, this field will not be used. This information will be captured in Material Test Templates.   |
| Dist from Grade – Length      | Per KYTC policy, this field will not be used. This information will be captured in Material Test Templates.   |
| Station                       | Population of this field is required for concrete cylinders, soils, aggregate base, and cores.  |
| Offset                        | Population of this field is required for the following:<br><ul style="list-style-type: none"> <li>- Concrete pavement cylinders and Aggregate base: indicate left or right of centerline (e.g. Left)</li> <li>- Soils and Cores: distance left or right from centerline (e.g. 7' Left)</li> </ul> |
| Reference                     | The location referenced on the plans where the sample was taken. The population of this field is optional.  |
| Smpld From                    | Population of this field is required for concrete cylinders structure location and other locations as needed.   |
| Smpl Origin                   | The population of this field is optional. May enter a description of where the sample originated.   |
| Control Type                  | This field should be populated with the Control Type (e.g. Batch Number, Heat Number, Lot Number) for Reinforcement Steel, Liquid Asphalt, Paint, Cement, Latex, Herbicide, Pipe, and when applicable based on the Field Sampling & Testing Manual.   |
| Cntrl Number                  | This field should be populated when a Control Type is selected in the previous field.   |
| Seal Number                   | This field is populated with the roll number for Geotextiles and when applicable based on the Field Sampling & Testing Manual.  |
| Design Type                   | Using the pick-list, this field should be populated when a mix design is being sampled.   |
| Mix ID                        | Using the look-up function, populate this field with the Mix ID being sampled.  |
| Plant ID                      | Per KYTC policy, this field will not be used.   |
| Plant Name                    | Per KYTC policy, this field will not be used.   |
| Plant Type                    | This field is auto populated with the type of plant (e.g. Aggregate, Concrete Pipe).  |

| Field Name               | KYTC Population Policy & Procedure  |
|--------------------------|---|
| Creator User ID          | This field is auto populated with the ID of the person who created the sample record.   |
| Include Standard Remarks | Population of this field indicates that standard remarks should be included on the Lab Report.<br>This checkbox should always be populated for Project Acceptance and QC samples. |
| Last Modified User ID    | This field is auto populated with the ID of the person who last modified the sample record.   |
| Last Modified Date       | This field is auto populated with the date when the last modification was made to the sample record.  |

The Additional Sample Data Folder Tab Field Table  
**Table 4-2**



Policy and Procedure

## KYTC Procedure

The Sampler is responsible for completing the necessary fields as documented Table 4-2.



### Exercise 4-3

In the following exercise, you will add additional data to a sample record.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. Click the **Addtl Sample Data** folder tab.
2. In the **Station** field, enter the value **1+00**.
3. In the **Offset** field, enter the value **RIGHT**.



*Remember, when entering data in a freeform textbox, make sure to always enter the text in uppercase. Database searches are case sensitive and reports look for specific values in freeform text fields. Mix case text may cause reports to appear incomplete because they will not retrieve data correctly*

4. Select the **Include Standard Remarks** checkbox.
5. Click the **Save** button.

## Contract Sample Data

The Contract folder tab is used to associate a sample to a particular contract by project (or contracts). When an association is made between a sample and a contract, it is done at the line item level. That is, the sample is kept on the line item within the project within the contract. In addition to the associations, entry of a quantity to be associated with the contract is allowed.

The sampler is responsible for associating the contract item(s) in the Contract folder tab for Project Acceptance samples only. The sampler may opt to populate the Represented Qty field but it is not required.

| Contract ID | Project       | Line Item | Item Code | Fed State Prj Nbr | Cont Est Matrl Qty | Represented Qty | Material Unit | Reported Matrl Qty | Satisfy Rep Matl Qty | Line Item |
|-------------|---------------|-----------|-----------|-------------------|--------------------|-----------------|---------------|--------------------|----------------------|-----------|
| 000753      | X048042104002 | 0073      | 00003M    | FD04 048 042      | 0.000              | 20.000          | METRIC TOI    | 0.000              | 0.000                | CRUS      |

The Contract Folder Tab

Figure 4-5

## KYTC SiteManager Field Definitions

| Field Name         | KYTC Population Policy & Procedure   |
|--------------------|--|
| Contract ID        | Using the search function, make the necessary contract item associations for Project Acceptance samples. The Contract ID will be displayed based upon the record selected.   |
| Project            | This field is auto populated with the Project Number based on the record selected.   |
| Line Item          | This field is auto populated with the Line Item based on the record selected.  |
| Item Code          | This field is auto populated with the Item Code based on the record selected.  |
| Fed State Prj Nbr  | This field is auto populated with the Federal/State number based on the record selected.   |
| Cont Est Matrl Qty | This field is auto populated with the Contract Estimated Material Quantity based on the record selected.<br>This is the material quantity expected to be placed over the life of the contract based on the current bid item quantity to conversion factor relationship identified in the contract sampling and testing requirements. |
| Represented Qty    | Population of this field is optional.  |

| Field Name                 | KYTC Population Policy & Procedure   |
|----------------------------|--|
| Material Unit              | This field is auto populated with the Material Unit based on the record selected.  |
| Reported Matr Qty          | This field is auto populated with the Reported Material quantity based on the record selected.<br>This total material installed. Calculated: Installed Quantity of Contract Item x Conversion Factor.  |
| Satisfy Rep Matr Qty       | This field is auto populated with the Satisfy Reported Material Quantity (total material quantity reported on the Contract tab of the Maintain Sample Window) based on the record selected.<br>In standalone mode, this data only includes those samples logged on the current local database, and therefore may not be representative of the entire item. |
| Line Item Desc             | This field is auto populated with the Line Item Description based on the record selected.  |
| Supplemental Description 1 | This field is auto populated with the Supplemental Description based on the record selected.   |
| Supplemental Description 2 | This field is auto populated with the Supplemental Description 2 based on the record selected.   |
| Contract Description       | This field is auto populated with the Contact Description based on record selected.  |

The Contract Folder Tab Field Table  
**Table 4-3**





Policy and Procedure

## KYTC Procedure

The sampler is responsible for associating the contract item(s) in the Contract folder tab for Project Acceptance samples only. The sampler may opt to populate the Represented Qty field but it is not required.



### Exercise 4-4

In the following exercise, you will associate a sample to a contract.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Click the **Contract** folder tab.
2. Click the **New** button.
3. The **Select Contract/Material Information** dialog box opens.
4. Using the *right* mouse button, click the **Contract ID** field.
5. From the object menu, click **Search**.
6. In the **Search** window, double-click Contract **000753**.
7. In the **Project Number/Line Item Number** list box, scroll to and click Project Number **X048042104002**, Line Item Number **0073**.
8. Click **Ok**.
9. In the **Represented Quantity** field, type **20**.
10. Click the **Save** button.

## Other Sample Data

Other Sample Data Folder Tab

**Figure 4-6**

### KYTC SiteManager Field Definitions

| Field Name | KYTC Population Policy & Procedure   |
|------------|--|
| Type       | For Non-Construction types of contracts, select the type of non-construction contract. |
| ID         | Enter a space.   |

The Other Sample Data Field Table

**Table 4-4**



Policy and Procedure

## KYTC Procedure

For testing performed for Non-Construction contracts, the Sampler will indicate the contract type on the Other tab.

## Entering Sample Tests

This tab allows the user to identify the tests to be performed on the sample and to enter the results of the tests. The user can identify tests that have been defined for the material. It also allows the user to track when the test starts and is completed. A test method may be performed on a material more than once since a unique Sample Test Number must be assigned to each test.

When a test is selected, the Services menu's Enter/View Test Data choice allows the entry of the test data. This menu choice will access the material specification for comparison to the sample for tests methods with fixed specifications.

The screenshot shows the 'Maintain Sample Information' window with the 'Tests' tab selected. The 'Sample' field contains '01312VXR060001'. A table lists test methods, with one entry: 'AGK200&T27' with 'Sample Test Nbr' '1' and 'Test Description' 'WET SIEVE KY'. Below the table, fields for 'Test Method', 'Lab ID', 'Sample Test Nbr', 'Charge Amount', 'Received Date', 'Actual Start Date', and 'Actual Completion Date' are visible.

| Test Method | Sample Test Nbr | Test Description |
|-------------|-----------------|------------------|
| AGK200&T27  | 1               | WET SIEVE KY     |

Test Method: AGK200&T27      WET SIEVE KY  
Lab ID: T0001      Central Office Laboratory  
Sample Test Nbr: 1      Received Date: 11/01/06  
Charge Amount: \$100.00      Actual Start Date: 00/00/00  
Actual Completion Date: 00/00/00

\* KYTC Customized

The Sample Tests Folder Tab

Figure 4-7

### KYTC SiteManager Field Definitions

| Field Name             | KYTC Population Policy & Procedure   |
|------------------------|--|
| Test Method            | Using the search function, the <i>Sampler</i> is responsible for selecting the tests that should be performed on the sampled material. The Sampling Checklist should be used as a guideline for determining what tests to select.                                  |
| Lab ID                 | Using the search function, specify the lab that will perform the test.   |
| Sample Test Nbr        | Populate the Sample Test Nbr field with the number “1” for the first incident of that particular test method. Any subsequent incidents of the <u>same</u> test method for the sample should be numbered sequentially (2, 3, etc.).                                 |
| Received Date          | The <i>Tester</i> should populate this field with the actual date the sample arrived at the lab (i.e. receiving date).<br><u>Note:</u><br>- The system defaults to the current date.   |
| Charge Amount          | This field is auto populated. Per KYTC policy, this field will not be used.  |
| Actual Start Date      | The <i>Tester</i> should populate this field with the <b>Actual Start</b> date of the test. The one exception to this policy is for the cylinder samples, which required the <i>Sampler</i> to populate this field with the estimated break date for the cylinder. |
| Actual Completion Date | The <i>Tester</i> should populate this field with the actual date the test was completed. This field is required in order to authorize the sample record.  |

The Sample Test Folder Tab Field Table  
**Table 4-5**



Policy and Procedure

### **KYTC Procedure**

The Sampler is responsible for completing the necessary fields as documented in the policy and procedures for the Tests folder tab, including assigning the test that are to be performed on the sample. The Tester is responsible for completing the data entry for each of the associated material test templates and populating the “Received Date”, “Actual Start Date” and “Actual Completion Date” field.



## Exercise 4-5

In the following exercise, you will associate a test to a sample.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. Click the **Tests** folder tab.
2. Using the *right* mouse button, click the **Test Method** field.
3. From the object menu, click **Search**.
4. In the **Search** window, scroll to and double-click Test Method **AGK200&T27-WET SIEVE KY**.
5. Press the **Tab** key.
6. Using the *right* mouse button, click the **Lab ID** field.
7. From the object menu, click **Search**.
8. In the **Search** window, scroll to and click Lab ID **T0001**.
9. Click **Ok**.
10. In the **Sample Test Nbr** field, type **1**.
11. In the **Received Date** field, enter **today's date**.
12. In the **Actual Start Date** field, enter **today's date**.
13. Click the **Save** button.

## Entering Test Data

When a test is selected, the Services menu's Enter/View Test Data choice allows the entry of the test data. This menu choice will access the fields of the material specification as a template for entry of the test data and the values of the materials specification for comparison to the sample.

**Material Test Template Usage**

Sample ID : 01312VXR06001 Test Method : AGK200&T27 Test Number: 1  
 Material Code : 10450 Mix Type :

**Print**

**WET SIEVE KY**

Matl Cd: 10450 Sample ID: 01312VXR060001  
 Material Name: BASE AGG - CSB Test Method: AGK200&T27  
 Prod Supp Cd: AGP006401 Test No.: 1  
 Prod Supp Name: HILLTOP @ BUTLER Tester: sfoster

**KY -200 and T27 Wet Sieve Analysis**

Mass of Pycnometer, Water and the Test Portion Before Washing 6063  
 Mass of Pycnometer, Water and the Test Portion After Washing 5922  
 Mass of Pycnometer and Water 4183  
 Percent of Material Finer Than a No. 200 Sieve 8

|        | GRAMS<br>RETAINED | PERCENT<br>RETAINED | DRY<br>PERCENT<br>PASSING | WET<br>PERCENT<br>PASSING |
|--------|-------------------|---------------------|---------------------------|---------------------------|
| 4"     | 0.0               | 0.0                 | 100.0                     | 100.0                     |
| 3 1/2" | 0.0               | 0.0                 | 100.0                     | 100.0                     |
| 3"     | 0.0               | 0.0                 | 100.0                     | 100.0                     |
| 2 1/2" | 0.0               | 0.0                 | 100.0                     | 100.0                     |
| 2"     | 0.0               | 0.0                 | 100.0                     | 100.0                     |
| 1 1/2" | 0.0               | 0.0                 | 100.0                     | 100.0                     |

The Test Data Window Using KY-200 and T27 Wet Sieve Analysis  
**Figure 4-8**



### Exercise 4-6

In the following exercise, you will enter test data.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Click test **AGK200&T27**.
2. Click the **Services** menu and click the **Enter/View Test Data** choice.

Enter the following information:

|  |                |
|--|----------------|
| Mass of Pycnometer, Water and the Test Portion before washing. | 6063           |
| Mass of Pycnometer, Water and the Test Portion After Washing   | 5922           |
| Mass of Pycnometer and Water                                   | 4183           |
|  |                |
|  | Grams Retained |
| 4"   | 0              |
| 3"   | 0              |
| 2"   | 0              |
| 1 1/2"   | 0              |
| 1"   | 0              |
| 3/4"   | 97             |
| 1/2"   | 0              |
| 3/8"   | 1126           |
| 1/4"   | 0              |
| #4   | 665            |
| #8   | 434            |
| #16  | 0              |
| #30  | 0              |
| #50  | 295            |
| #100   | 0              |
| #200   | 127            |
| PAN  | 4              |
| Dry Gradation Beginning Mass                                   | 2750           |
| Dry Gradation Ending Mass                                      | 2748           |

3. Click the **Close** button located on the toolbar to return to the Sample Record.
4. A 'Do you wish to Save Changes?' question will appear.
5. Select **Yes**, to save changes.

## Associating Test Personnel to a Test

The Service menu's Testers choice allows testing personnel to be associated to a sample's specific test method.



The Sample Testers Window

Figure 4-9

## KYTC SiteManager Field Definitions

| Field Name | KYTC Population Policy & Procedure   |
|------------|--|
| Testers    | <p>Provides a look-up of testers that are qualified for the selected test method. Available from the Tests tab when a test has been added to the Tests tab. Select the tester who performed the test. If you edit the test results your name will automatically be added to the Tester List. NOTE: If the tester is not qualified to perform the test, their name will not be available from the Tester Search Window.</p> |

Sample Testers Field Table

Table 4-6



Policy and Procedure

## KYTC Procedure

At KYTC, the DME, Inspector and the Lab Supervisors will run a custom report that will indicate samples waiting Authorization.



*An Actual Completion Date must be entered for each test listed on the bottom data window of the Tests folder tab before the sample can be authorized.*





## Exercise 4-7

In the following exercise, you will associate a tester to a test.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. Click the **Services** menu and click the **Testers** choice.
2. **Click** the **New** icon located on the toolbar.
3. Using the *right* mouse button, click the **Tester ID** field.
4. From the object menu, click the **Search** choice.
5. In the **Search** window, scroll to and double-click **cjones-Chris Jones**.



*Question? Why is Stephen Foster already selected as a tester? The reason Stephen Foster is already as a tester is because you logged in as Stephen Foster and entered the test results. SiteManager automatically adds you as a tester. Keep in mind, Stephen Foster must have been qualified as a tester.*

6. Click the **Save** button.
7. Click the **Close** button.

## Sampling Information — Authorizing

In order to authorize the sample, all required fields on the Basic Sample Data tab need to contain a value, and all tests specified for the sample must have an actual completion date entered. In addition, only certain sample statuses (as specified by the transportation agency) will allow for a sample to be authorized.

When the sample is authorized, the Authorized Date and Authorized By fields are filled in, and appropriate In-box messages are sent to the project personnel letting them know about the authorized sample. Once the sample has been authorized, it cannot be modified.

| Maintain Sample Information |                                     |            |                    |              |          |
|-----------------------------|-------------------------------------|------------|--------------------|--------------|----------|
| Basic Sample Data           | Addtl Sample Data                   | Contract   | Other              | Tests        |          |
| Smpl ID:                    | 01312SCF060001                      | Status:    | COMPLETE           |              |          |
| Revised By:                 |                                     | Revising:  |                    | Sample Date: | 01/16/06 |
| Link To:                    |                                     | Link From: |                    | Log Date:    | 09/25/06 |
| Smpl Type:                  | PROJECT ACCEPTANCE                  | Acpt Meth: | TEST RESULTS       |              |          |
| Material:                   | 10455                               |            | BASE AGG - DGA     |              |          |
| Sampler:                    | sfoster                             |            | Stephen Foster     |              |          |
| P/S:                        | HILLTOP @ BUTLER                    |            | AGP006401          |              |          |
| Type:                       | LMST                                | City:      | Butler             |              |          |
| Prod Nm:                    | DGA LIMESTONE                       |            |                    |              |          |
| Mnfctr:                     | HILLTOP @ BUTLER                    |            | AGP006401          |              |          |
| Town:                       |                                     | Geog Area: | DISTRICT 01        |              |          |
| Intd Use:                   |                                     |            |                    |              |          |
| Repr Qty:                   | .000                                | TONS       |                    |              |          |
| Auth By:                    | sfoster                             | Auth Date: | 09/27/06           |              |          |
| Lock Type:                  |                                     | Locked By: | sfoster            |              |          |
|                             |                                     | Lock Date: | 9/27/2006 14:04:51 |              |          |
| Central:                    | <input checked="" type="checkbox"/> |            |                    |              |          |

The Sample Information Basic Sample Data Folder Tab

Figure 4-10



### Exercise 4-8

In the following exercise, you will review the Custom Authorization Report and authorize the current sample.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. **Open** Internet Explorer.
2. Enter the following **URL**  
<http://kytct00d03/businessobjects/enterprise115/InfoView/logon.aspx>
3. Enter the following Information to log into the KYTC Crystal Report Site:  
System: kytct00d03  
Username: train#  
Password: train#  
Authentication: Enterprise

4. In the left pane window, **Click** on the **Public folder\training\materials\sampling and testing**. The main window pane will display a list of reports.
5. Select the **Worklist/Authorization** report.

You can navigate through the report by using the following Crystal Report Navigation buttons.

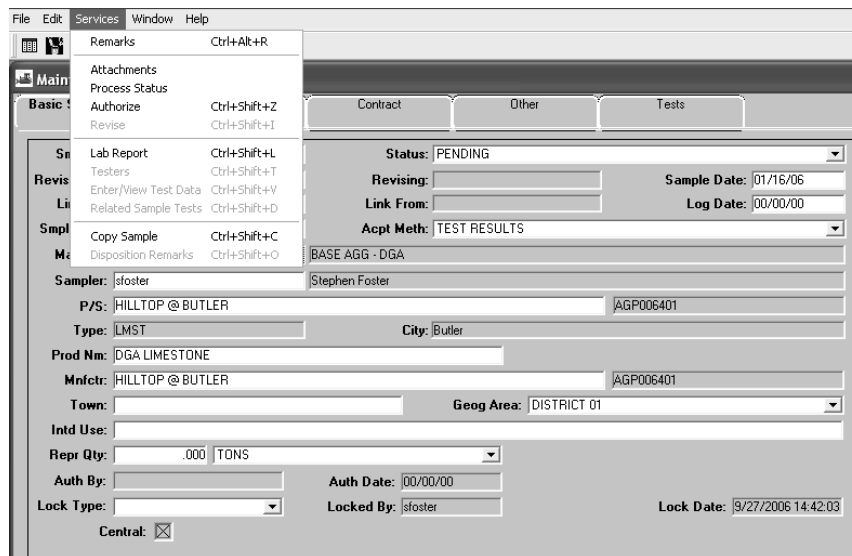


6. **Close** Internet Explorer and return to SiteManager.
7. In the **Actual Completion Date** field, type today's date.
8. Click the **Save** button.
9. Click the **Basic Sample Data** folder tab.
10. In the **Status** field, select the **Complete** option.
11. Click the **Services** menu and click **Authorize**.
12. Click the **Save** button.
13. How do you know the sample is authorized?

The sample is grayed out

14. Click the **Close** button.

## Revising, Copying, and Linking Samples



Copy Sample Menu Options  
Figure 4-11

### Revising a Sample

Samples have a complex group of related options that allow associations to be made. The Services menu's Revise choice allows a sample, particularly an authorized one, to create a copy of the sample for revision. The Services menu's Copy function allows a copy to be made for the sample. The Link To field provides a search function to link the sample to another sample.

### KYTC SiteManager Field Definitions

| Services Option      | KYTC Policy & Procedure  |
|----------------------|--|
| Remarks              | <p>Opens the remarks balloon for free-form data entry.</p> <ul style="list-style-type: none"> <li>- Available from the Basic Sample Data, Addtl Sample Data, Contract, and Other tabs.</li> </ul> <p><b>Status:</b> The Sampler and Tester will fill in the remarks as needed and applicable to the sample. If a sample is in the FAILED status, detailed information needs to be added to the Disposition remarks. If a sample is in the FAILED AND REMOVED FROM PROJECT status, detailed information needs to be added to the Disposition remarks as to why it failed and was removed.</p> <p><b>Sample Responsibility:</b> If CONSULTANT or OTHER AGENCY is chosen, User will log comment in the remarks bubble of the Sample Information window regarding specific type of consultant that took the sample.</p> <p><b>Test Responsibility:</b> If CONSULTANT is chosen, User will log comment in the remarks bubble of the Sample Information window regarding specific type of consultant that took the sample.</p> |
| Attachments          | Per KYTC, this option will not be used.  |
| Authorize            | <p>Authorizes the sample.</p> <ul style="list-style-type: none"> <li>- Available from the Basic Sample Data and Addtl Sample Data tabs.</li> </ul> <p>The DME, RE and the Lab Supervisors will run a custom report that will indicate samples ready for authorization, and then the DME, RE or the Lab Supervisor will authorize the sample. <b>Disposition remarks should be completed for all sample records with the status of FAILED and FAILED AND REMOVED FROM PROJECT.</b></p>  |
| Revise               | <p>Provides means to revise an existing sample.</p> <ul style="list-style-type: none"> <li>- Available from the Basic Sample Data after a sample has been authorized.</li> </ul> <p>A revised sample will be created to correct errors, or for recheck samples.</p> <ul style="list-style-type: none"> <li>- An exception would be when sample records are created from the applet spreadsheets. The sample records would be fixed, and then reloaded into SiteManager, replacing the original sample records.</li> </ul>  |
| Lab Report           | <p>Provides a report of the sample information.</p> <ul style="list-style-type: none"> <li>- Available from the Basic Sample Data and Addtl Sample Data tabs.</li> </ul> <p>Use as needed.</p>   |
| Testers              | <p>Provides a look-up of testers that are qualified for the selected test method.</p> <ul style="list-style-type: none"> <li>- Available from the Tests tab when a test has been added to the Tests tab.</li> </ul> <p>Select the tester who performed the test.</p> <p>If you edit the test results your name will automatically be added to the Tester List.</p> <p>NOTE: If the tester is not qualified to perform the test, their name will not be available from the Tester Search Window.</p>  |
| Enter/View Test Data | <p>Opens the material test template associated with the selected test method.</p> <ul style="list-style-type: none"> <li>- Available from the Tests tab when a test has been added to the Tests tab.</li> </ul> <p>Use as needed.</p>  |
| Related Sample Tests | <p>Provides details about the tests performed on the original sample.</p> <ul style="list-style-type: none"> <li>- Available from the Tests tab for a Revised Sample.</li> </ul> <p>Use as needed for viewing revised or recheck samples.</p>  |

| Services Option     | KYTC Policy & Procedure  |
|---------------------|--|
| Copy Sample         | Provides the ability to copy an existing sample record.<br>- Available from the Basic Sample Data tab.<br>Use as needed.   |
| Disposition Remarks | Provides the ability to add disposition remarks to a sample. This is the only field that can be changed after a sample is authorized. Disposition remarks print out on the lab report.<br>- Available from the Basic Sample Data and Addtl Sample Data tab for an Authorized Sample.<br><br>The Disposition Remarks needs to be filled out as to why a revised or recheck sample is going to be created. If any other remarks need to be documented on an authorized sample, they could be filled out as applicable.<br>On FAILED samples, enter the Actions Taken indicating resolution.. |

Services Menu Table  
**Table 4-7**



Policy and Procedure

## KYTC Procedure

A revised sample will be created to correct errors, or for recheck samples.

An exception would be when sample records are Uploaded through the Applet spreadsheets for QC/QA. To correct sample records uploaded through the Upload process, corrections will be performed in the Excel Workbooks and uploaded into SiteManager, replacing the original sample records. This process will be discussed in the next section – Mix Design.



## Exercise 4-9

In the following exercise, you will revise a sample.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Double-click the **Sample Information** icon.
2. Click the **Open** button.
3. In the **Sample ID** list box, scroll to Sample ID **01312SCF060002**.
4. Click the **OK** button.
5. This sample failed and the action taken needs to be documented. Click the **Services** menu and click the **Disposition Remarks** choice.
6. Enter the following comment:  
**ACTIONS TAKEN: 10% DEDUCT WAS APPLIED.**
7. **Close** the Disposition window by clicking **Services →Disposition Remarks** once again.
8. Click the **Save** button.
9. Lets Revise this sample.  
Click the **Services** menu and click the **Revise** choice.
10. In the **Smpl ID** field, enter the same Sample ID with the characters “RV01” added to the end to indicate this is a revised sample.  
Example: 01312SCF060002RV01



*Short Cut: Place your mouse over the Sample ID in the Revising field. Right click your mouse. A green box will appear with the Sample ID. If a green box does not appear, a popup window will appear. Select Show Detail in the popup window. Highlight the sample id and perform a Ctrl-C on your keyboard to copy this Sample ID. Click in the Smpl ID field and perform a Ctrl-V on your keyboard to copy the sample id. Now all you have to do is add RV01 to the end of the Sample ID. This will ensure the Sample ID is correct.*

11. Using the *right* mouse button, click the **P/S** field.
12. From the object menu, click **Search**.
13. In the **Search** window, double-click **AGP006701-BOURBON LIMESTONE@PARIS**.
14. Using the *right* mouse button, click the **Mnfctr** field.
15. From the object menu, click **Search**.
16. In the **Search** window, double-click **AGP000501 ROGERS GROUP@CANTON**.
17. Click the **Save** button.
18. Click the **Close** button.

## Linking a Sample

Maintain Sample Information Panel  
**Figure 4-12**

## KYTC SiteManager Field Definitions

| Field Name | KYTC Population Policy & Procedure   |
|------------|--|
| Link To    | <p>This sample ID reflects another sample to which this one is-linked. This link reflects the tie from this sample to the next in the chain of samples. It is used in part, to group samples together.</p> <p>This field is populated by using the look-up function to link the current sample to another sample that already exists in SiteManager. Link samples for the following:</p> <ul style="list-style-type: none"> <li>- IAS Samples will be linked to an Acceptance Sample</li> <li>- Other situations when applicable.</li> </ul> |

Link To Field Table  
**Table 4-8**





## Exercise 4-10

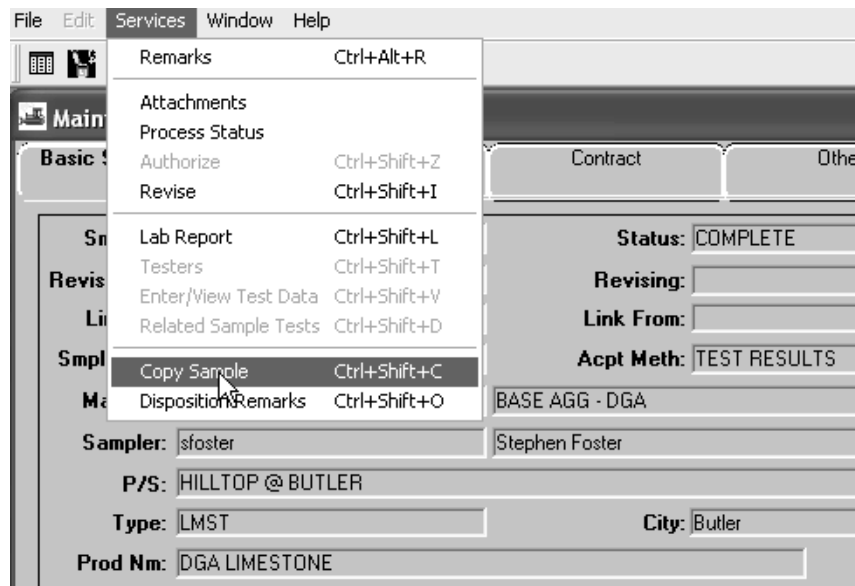
In the following exercise, you will link a sample to a corresponding sample.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the Sampling and Testing panel, double-click the **Sample Information** icon.
2. Click the **Open** button.
3. In the **Sample ID** list box, scroll to Sample ID **01312SCF060006**.
4. Click the **OK** button.
5. Using the *right* mouse button, click the **Link to** field.
6. From the object menu, click the **Search** choice.
7. In the **Search** window, scroll to and click Sample ID **01312SCF060004**.
8. Click **Ok**.
9. Click the **Save** button.

## Copying a Sample

The Services menu's Copy function allows a copy to be made of the sample.



Copy Sample Services Menu Option

**Figure 4-13**



## Exercise 4-11

In the following exercise, you will copy a sample.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. Click the **Services** menu and click the **Copy Sample** choice.
2. In the **Smpl ID** field, enter a valid Sample ID (DDCCIIIYY#####).
3. Click the **Save** button.



*FYI: Click each tab and notice the information that was copied from the original Sample Record.*

4. Click the **Close** button.

## Review for Section 4

To modify an unauthorized sample:

1. On the **Sampling and Testing** panel, double-click the **Sample Information** icon.
2. Click the **Open** button.
3. In the list box, scroll to and click the desired Sample.
4. Click **Ok**.
5. Press the **Tab** key to advance to the field to be modified.
6. Enter the desired change.
7. Click the **Save** button.
8. Click the **Addtl Sample Data** folder tab.
9. Press the **Tab** key to advance to the field to be modified.
10. Enter the desired change.
11. Click the **Save** button.
12. Click the **Contract** folder tab.
13. Press the **Tab** key to advance to the field to be modified.
14. Enter the desired change.
15. Click the **Save** button.
16. Click the **Other** folder tab.
17. Press the **Tab** key to advance to the field to be modified.
18. Enter the desired change.
19. Click the **Save** button.
20. Click the **Tests** folder tab.
21. Press the **Tab** key to advance to the field to be modified.
22. Enter the desired change.
23. Click the **Save** button.

To associate a sample to a Contract Line Item:

1. On the **Sampling and Testing** panel, double-click the **Sample Information** icon.
2. On the **Sample Data** folder tab, add a sample.
3. Click the **Contract** folder tab.
4. Click the **New** button.
5. Using the *right* mouse button, click the **Contract ID** field.
6. From the object menu, click **Search**.
7. In the **Search** window, double-click the desired Contract.
8. In the **Project Number/Line Item Number** list box, scroll to and click the desired Project/Line Item.
9. Click **Ok**.
10. In the **Represented Quantity** field, type the desired value.
11. To add additional contracts and projects/line items, click the **New** button and repeat steps 4-8.
12. Click the **Save** button.

To add the association of a sample with another entity:

1. On the **Sampling and Testing** panel, double-click the **Sample Information** icon.
2. On the **Sample Data** folder tab, add a sample.
3. Click the **Other** folder tab.
4. In the **Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
5. Press the **Tab** key.
6. In the **ID** field, type a space as a value.
7. Click the **Save** button.

To associate a sample to a test:

1. On the **Sampling and Testing** panel, double-click the **Sample Information** icon.
2. On the **Sample Data** folder tab, add a sample.
3. Click the **Tests** folder tab.
4. Using the *right* mouse button, click the **Test Method** field.
5. From the object menu, click the **Search** choice.
6. In the **Search** window, scroll to and click the desired test method.
7. Click **Ok**.
8. Press the **Tab** key.
9. Using the *right* mouse button, click the **Lab ID** field.
10. From the object menu, click the **Search** choice.
11. In the **Search** window, scroll to and click the desired lab ID.
12. Click **Ok**.
13. Press the **Tab** key.
14. In the **Start Date** field, type the date the testing started.
15. Press the **Tab** key.
16. In the **Charge Amount** field, type the amount charged for the test.
17. Press the **Tab** key.
18. In the **Estimate Completion Date** field, type the date.
19. Press the **Tab** key.
20. In the **Actual Completion Date** field, type the date
21. To add additional tests, click the **New** button and repeat steps 4-20.
22. Click the **Save** button.

To add the test data:

1. On the **Sampling and Testing** panel, double-click the **Sample Information** icon.
2. On the **Sample Data** folder tab, add a sample.
3. Click the **Tests** folder tab.
4. Click the desired **Test Method**.
5. Click the **Services** menu and click the **Enter/View Test Data** choice.
6. Enter the appropriate test data values for the specific test specification.
7. Click the **Save** button.
8. Click the **Close** button to return to the **Test** folder tab.

To add a tester associated to the test method:

1. On the **Sampling and Testing** panel, double-click the **Sample Information** icon.
2. On the **Sample Data** folder tab, add a sample.

3. Click the **Tests** folder tab.
4. Click the desired **Test Method**.
5. Click the **Services** menu and click the **Tester** choice.
6. Using the *right* mouse button, click the **Tester ID** field.
7. From the object menu, click the **Search** choice.
8. In the list box, scroll to and click the desired ID of the tester.
9. Click **Ok**.
10. Click the **Save** button.
11. Click the **Close** button to return to the **Test** folder tab.

To authorize a sample:

1. On the **Sampling and Testing** panel, double-click the **Sample Information** icon.
2. Click the **Open** button.
3. In the list box, scroll to and click the desired Sample.
4. Click **Ok**.
5. Click the **Services** menu and click the **Authorize** choice.
6. Click the **Save** button.

To revise a sample:

1. Open the sample to be revised.
2. Click the **Services** menu and click the **Revise** choice.
3. In the **ID** field, type ID for the sample.
4. Click the **Save** button.

To link samples:

1. Open the sample to be linked.
2. Using the *right* mouse button, click the **Link to** field.
3. From the object menu, click the **Search** choice.
4. Click the sample to be linked.
5. Click **Ok**.
6. Click the **Save** button.

To copy a sample:

1. Open the sample to be copied.
2. Click the **Services** menu and click the **Copy Sample** choice.
3. In the **ID** field, type ID for the sample.
4. Click the **Save** button.

To find a sample:

1. Double-click the **Find Sample** icon.
2. Click the desired parameter check box (ON).
3. Click **Ok**.
4. If appropriate, perform a **Filter** using the object menu (referenced in the Getting Started section).
5. Click **Ok**.

The Sampling and Testing Reports panel generates commonly used Sampling and Testing reports. The following report topics are available on this panel:

- Sample Backlog Summary,
- Lab Statistics Report,
- Testing Charges Report, and
- View Saved Reports (PSR).

## Summary Exercise for Section 4 Sampling and Testing

In the following exercise, you will create and modify sampling and testing data.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

### Exercise 1

You have received a sample on November 19<sup>th</sup>, 2006 for a construction project that is occurring in your district. The purpose of the testing is to verify the material is acceptable for this project. Using the following information, create a sample record. Use your district and crew number to create a valid Sample ID.

| Fields                           | Input   |
|----------------------------------|---|
| Material                         | 10450-BASE AGG-CSB                            |
| Sampler                          | Stephen Foster                                |
| Producer/Supplier                | ROGERS GROUP@CANTON, code AGP000501           |
| Intended use                     | SUBGRADE                                      |
| Station                          | 1+00  |
| Offset                           | RIGHT   |
| Contract #                       | 000753, Project X048042104002, Line Item 0073 |
| Represented Qty. for this sample | 50 Metric Tons                                |
| Test to be performed             | AGKY-200, Finer Than No. 200 KY               |
| Date the sample was received     | 11/19/06                                      |
| Test number                      | 1   |

### Exercise 2

Chris Jones has run test AGKY-200, Finer Than No. 200 KY and obtained data for the following:

- Mass of Pycnometer, Water and the Test Portion before Washing
- Mass of Pycnometer, Water and the Test Portion after Washing
- Mass of Pycnometer and Water

Assign Chris Jones as the tester and enter the test results to the Sample Record created in exercise one.

- Chris received the sample on 11/20/06.
- Chris began the testing on 11/23/06.
- Chris completed the test on 11/25/06.

Test Results entered by Chris Jones:

| Fields   | Data |
|--|------|
| Mass of Pycnometer, Water and the Test Portion before washing. | 6063 |
| Mass of Pycnometer, Water and the Test Portion After Washing   | 5850 |
| Mass of Pycnometer and Water                                   | 4183 |

**Exercise 3**

Stephen Foster has reviewed the test results and determined that this is a FAILED sample for the sample record created in Exercise 1. Set the appropriate STATUS and AUTHORIZE the sample record.

**Exercise 4**

Chris Jones has performed a second test, AGKY-200, Finer than No. 200 KY on material 10450-CSB AGG-CSB with the following passing results:

| <b>Fields</b>  | <b>Data</b> |
|--|-------------|
| Mass of Pycnometer, Water and the Test Portion before washing. | 6063        |
| Mass of Pycnometer, Water and the Test Portion After Washing   | 5922        |
| Mass of Pycnometer and Water                                   | 4183        |

Revise the record you created in step 1 and enter the passing results. Use the following dates

- RECEIVED DATE 12/02/06
- ACTUAL START DATE 12/03/06
- ACTUAL COMPLETION DATE 12/04/06

AUTHORIZE your revised sample record.







Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## Section 5 Mix Designs

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By the end of this learning module, you will be able to do the following:

Describe the KYTC Applet Upload Procedures

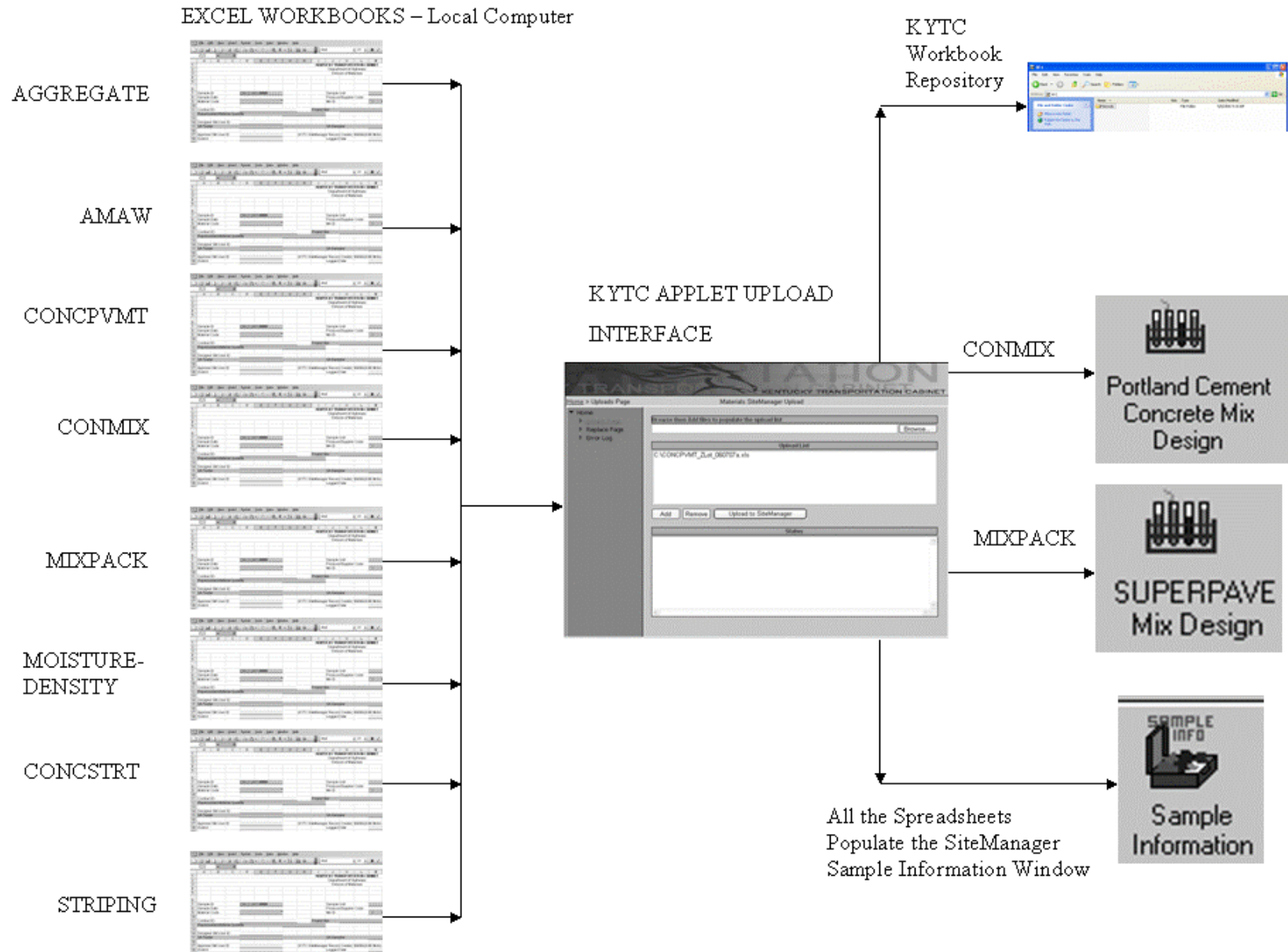
View a SUPERPAVE Mix Design Window

View a Portland Cement Concrete Mix Design Window

View a Pavement Structural Design Window

Modify a Pavement Structural Design

## KYTC Applet Upload Procedure and SiteManager Process Flowchart



## Uploading KYTC Applets

### Purpose

We provide this guide to aid you when uploading QC/QA and Mix Design Excel spreadsheets into the SiteManager database.

### Minimum Requirements

Users of the Materials Upload application need to have the following:

- Log-in privileges to the application established with the Commonwealth's Office of Technology
- Internet access

### Microsoft® Office® 2003

- Basic computer navigation skills

The import file must have the following:

- Standard layout structure for specified discipline.
- Non-duplicated sample ID if action is other than to replace an existing sample ID.

### Accessing the Materials Upload Application

Access the Materials Upload tool via the Intranet at the following URL:

<http://kytcw00b04/materialsapp/multipleuploads.aspx>

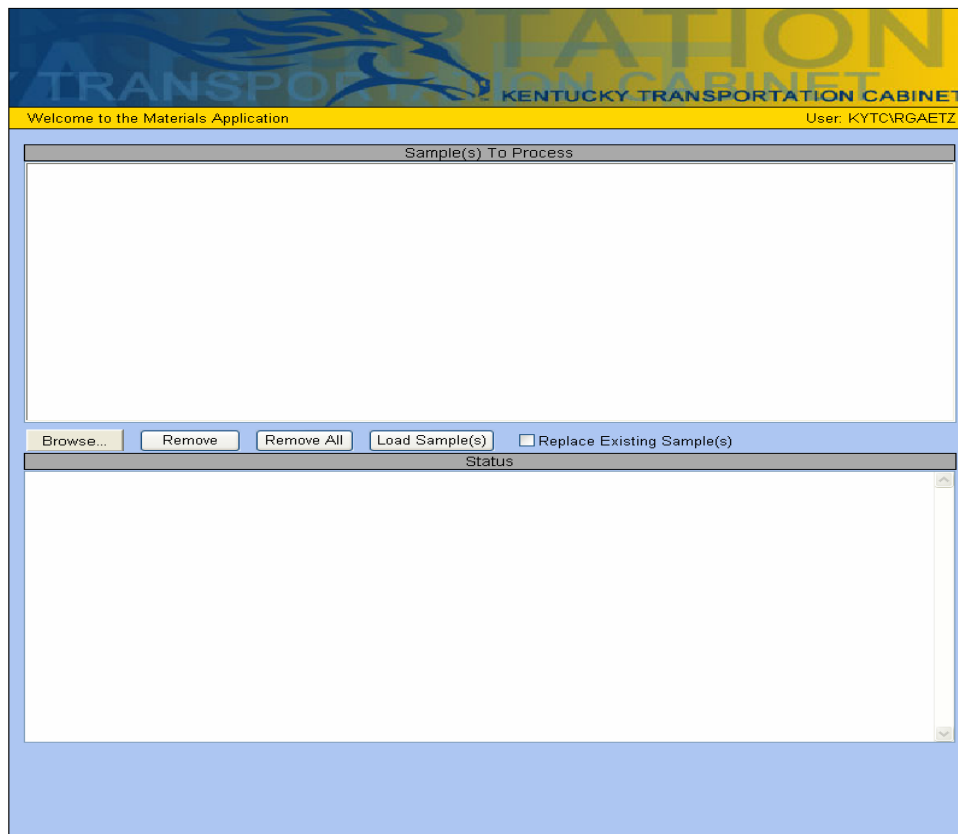
Uploading data to the SiteManager database is restricted to identified users. You must be listed in the security group for the same district listed in the sample ID in the spreadsheet to upload data. To gain access, the Division of Materials management must make a request to have your name added to the security listing.

- Request must include which district's folder the user will be accessing.
- A user may be listed under multiple folders.

### Understanding the Materials Upload Application

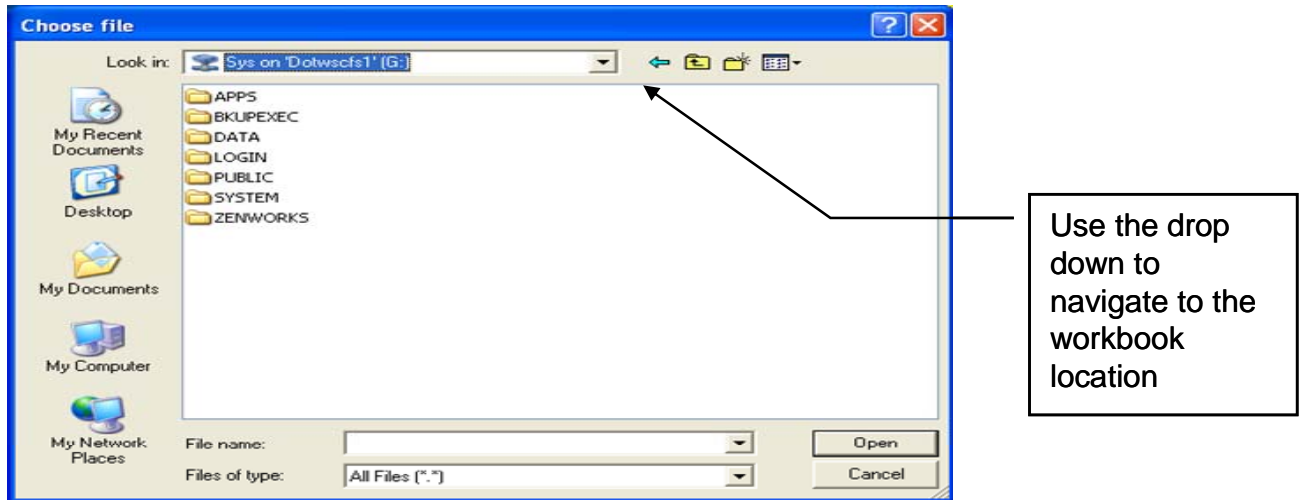
The KYTC Division of Materials Upload Application is a tool that accommodates all uploads of samples using correctly formatted Excel workbooks. Material information is validated and uploaded to the SiteManager database. The workbook is copied to a fileserver with accessibility restricted via security authorization.

## Uploading Materials Data to the SiteManager Database



Welcome to the Materials Application - Window  
**Figure 5-1**

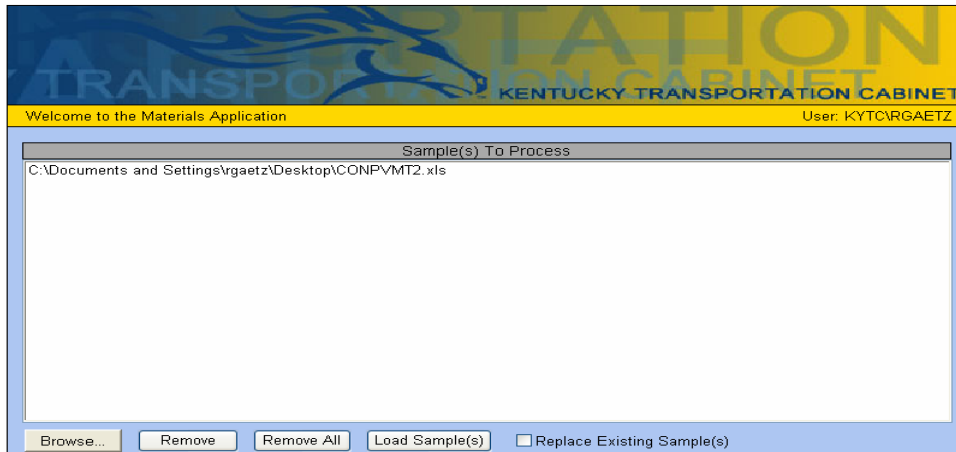
1. Enter the following URL in your Internet Browser  
<http://kytcw00b04/materialsapp/multipleuploads.aspx>
2. Browse for the workbook by clicking the Browse button located center/left of the Uploads Module screen. You will be navigated to the “Choose file” screen (see Figure 5-1).



Windows Choose File

**Figure 5-2**

3. Select a workbook by “double-clicking” or highlighting and clicking the ‘Open’ button on the browse screen. You will be navigated back to the Materials Upload screen (see Figure 5-3).



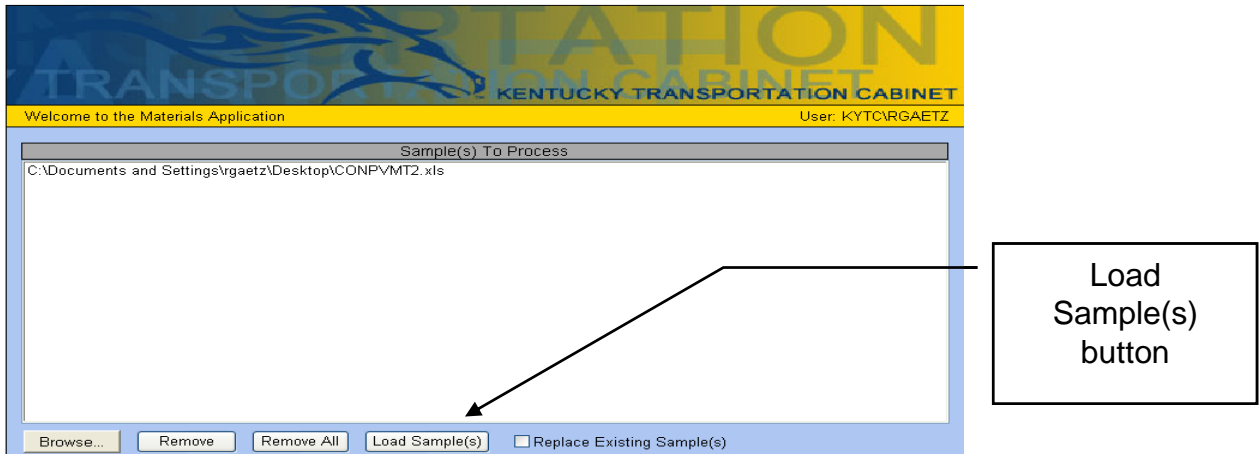
Sample(s) To Process Window Populated

**Figure 5-3**

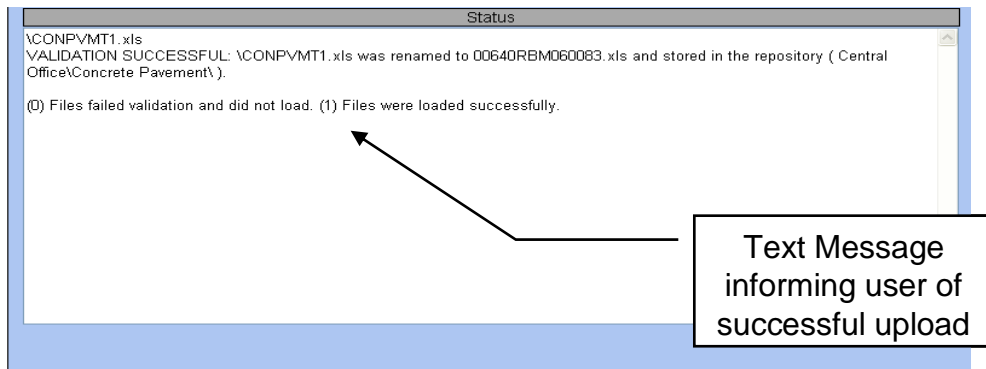
4. Review to ensure correct workbook was accessed and click the ‘Load Sample(s)’ button located below the ‘Sample(s) to Process’ listing. This process will initiate the file upload process to the SiteManager database.



*Multiple workbooks can be placed in the ‘Sample(s) to Process’ area prior to uploading to SiteManager. Repeat the ‘Browse’ and ‘add’ process to add multiple workbooks.*



Load Samples Example  
**Figure 5-4**



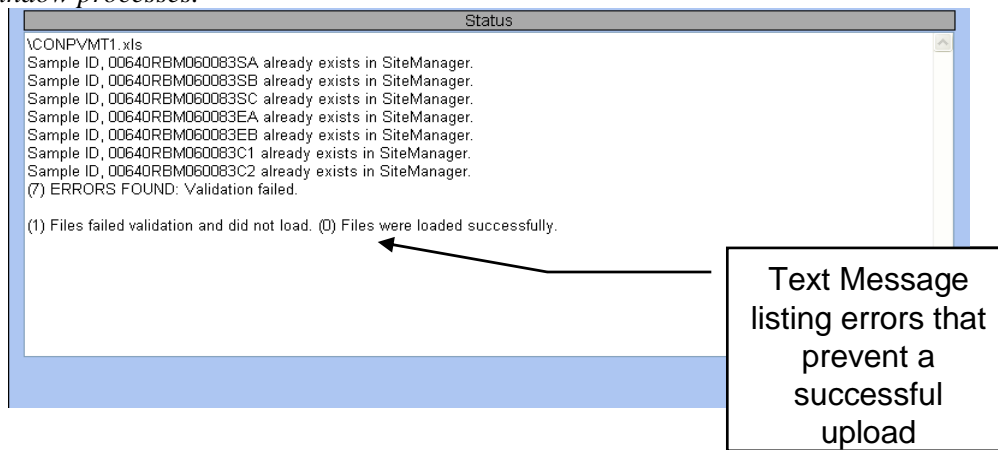
Successfully Loaded Message  
**Figure 5-5**

A text message will inform the user of a successful load (see Figure 5-5).

## Understanding Data Validation Errors

The user will be informed of data validation errors that prevent data from being upload to the SiteManager database. A listing of errors will be displayed in the Status window. These errors will provide a brief description of the error (see Figure 5-6).

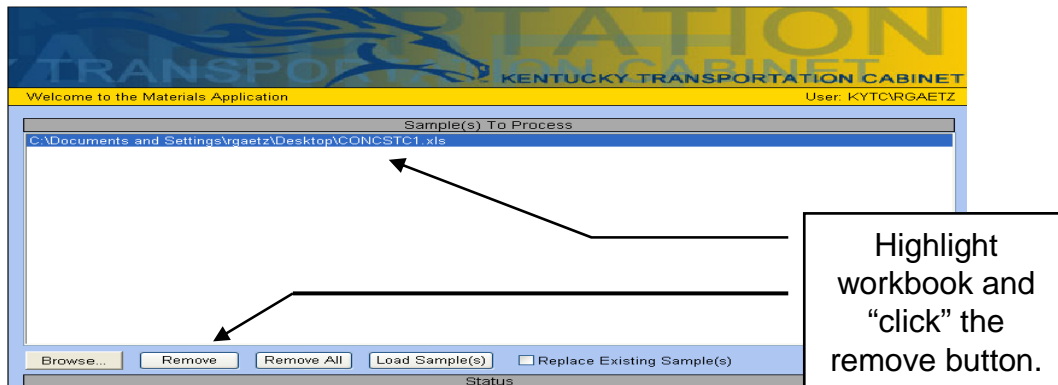
*The error messages can be copied or cut and pasted into an email, Word or other document using the standard Window processes.*



Unsuccessful Load – Error Messages  
**Figure 5-6**

## Removing a Workbook

To remove a workbook “highlight” the selection and activate the Remove button located below the Upload List.



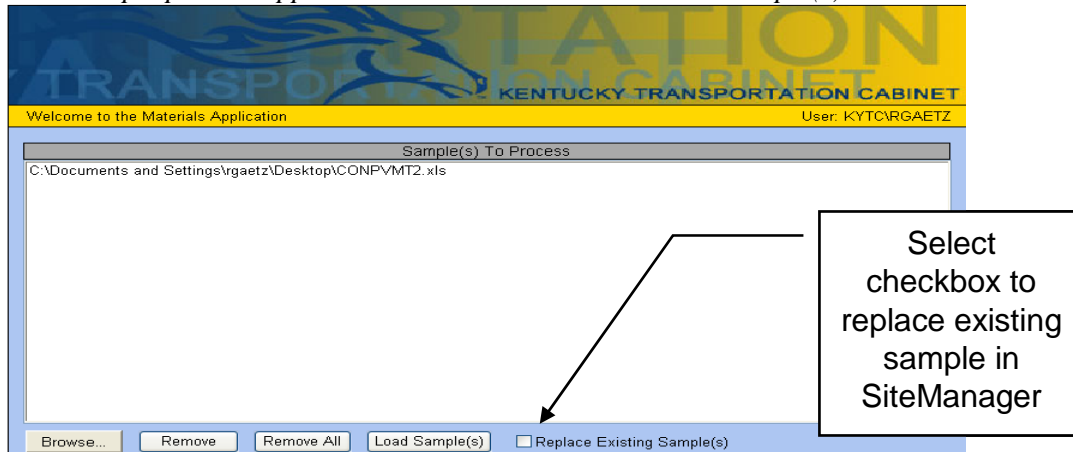
Removing Workbooks from the Sample to Process Window  
**Figure 5-7**

## Replacing a Sample

To replace a sample in the SiteManager database, highlight the sample you want to replace and select the Replace Existing Sample check box. Follow the steps defined in the “Uploading Materials Data to the SiteManager Database” section.

*All validation rules apply as with an initial upload with the exception of having an existing sample ID within SiteManager.*

*The Replace a Sample process applies to all workbooks located in the Sample(s) to Process window.*

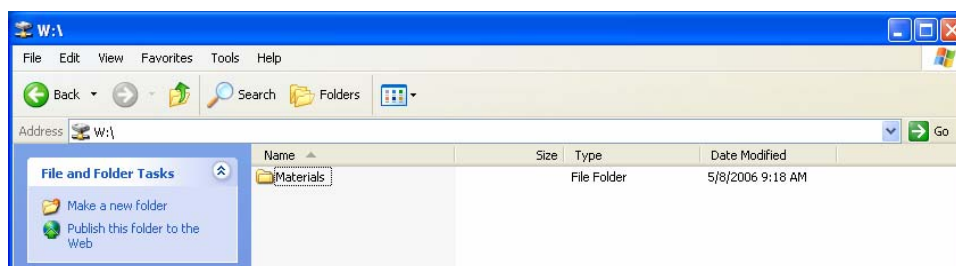


Replacing Workbooks  
Figure 5-8

## Workbook Repository

The Workbook Repository provides the user with a library of copies of successfully uploaded workbooks. Access to the Workbook Repository is security protected with access limited by District folder.

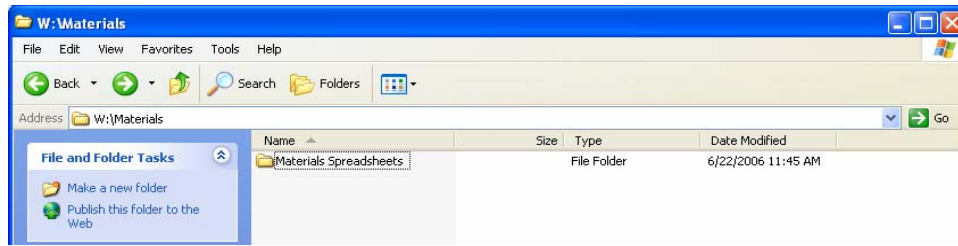
To access the Workbook Repository:



Workbook Repository Directory Structure  
Figure 5-9

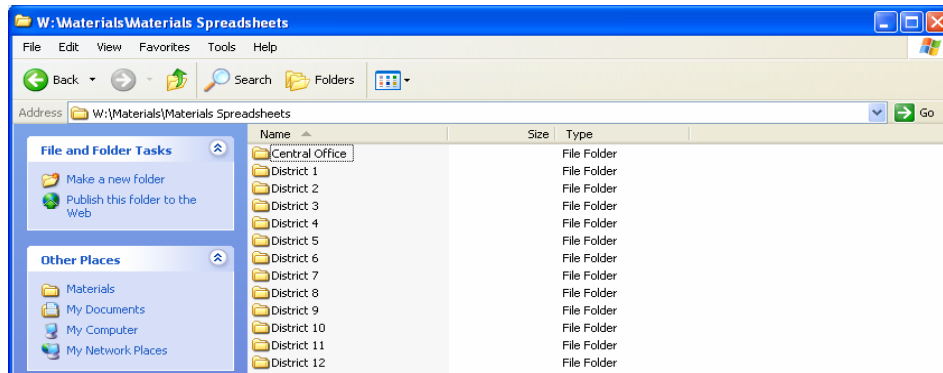
1. Map a drive to **\\kytcd00t11\datadev\Materials\**
2. Double-click the **Materials** folder (see Figure 5-9).





Material Spreadsheet Directory  
**Figure 5-10**

3. Double-click the **Materials Spreadsheet** folder (see Figure 5-10)

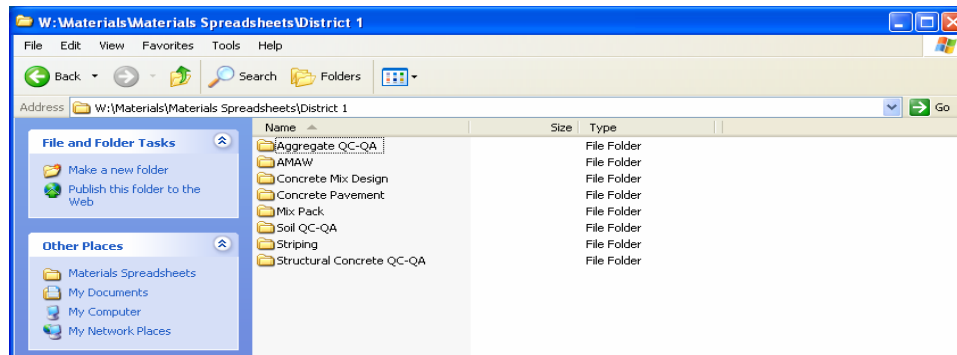


Central and District Office Directory Structure  
**Figure 5-11**

4. Select the **Central Office** or **District** sub-folder that will contain the workbook you are searching (see Figure 5-11).



*NOTE: Access to the Central Office or District sub-folders is limited to only those users having security access to these folders. A user may have access to multiple folders. To request access to a specific folder, review the contact listing in appendix B.*



Worksheet Disciplines Directory Structure  
**Figure 5-12**

5. Double-click the discipline of the workbook (see Figure 5-12).



*NOTE: Workbooks are named and sorted by Sample ID.*

### Error Log Listing

| Error Description |  | Spreadsheet Location  |
|-------------------|--|---|
| 1                 | a) 'Sample ID' already exists in SiteManager.  | a) Header tab – Sample ID   |
| 2                 | b) auth_by_cms_uid 'XXX' does not exist or is not authorized in SiteManager.                                       | b) Header tab - SM User ID  |
| 3                 | c) cms_uid 'XXX' does not exist or is not authorized in SiteManager.   | c) Header tab - SM User ID  |
| 4                 | d) smpld_by 'XXX' does not exist or is not authorized or is not qualified in SiteManager.                          | d) Sampling Technician  |
| 5                 | e) 'Material Code 'XXXXX' does not exist or is not active in SiteManager.  | e) Header tab – Material Code   |
| 6                 | f) Sample Mix ID 00640RBM050099does not exist in SiteManager.  | f) Header tab – Mix ID  |
| 7                 | g) Details Tester ID 'XXX' does not exist or is not valid for COCONCPLAS .   | g) Start Up tab – Plastic Test KYTC Witness   |
| 8                 | h) Tester ID 'XXX' does not exist or is not valid for COCONCPLAS .   | h) Start Up tab – Air Content Technician or Air Temp Technician or Conc Temp Technician |
| 9                 | i) The combination of contract, project number , line item number and material code does not exist in SiteManager. | i) Project Items tab- Project, Line Item Number or<br>j) Header tab – Contract Number   |

**Table 5-1**

### Application Contact Listing

| Function   | Contact                                 |
|--|---|
| a) Add New User                                      | a) Office of Information Technology     |
| b) Security Access                                   | b) Office of Information Technology     |
| c) Application inoperable or not working as designed | c) Central Office SiteManager Help Desk |

**Table 5-2**



## Exercise 5-1

In the following exercise, you will upload the CONPVMT EXCEL Workbook.

1. Open **My Computer** and navigate to **C:\SMTRAINS\TRAININGFILES**
2. Open Workbook **CONPVMT.xls**
3. Click the **Enable Macros** button.
4. With the Workbook open, click the **Header** tab.
5. What is the Material Code? 41295-PCCP
6. In cell C16 on the Header tab, change the initials in the Sample ID to your own initials.  
Example: Change **00640RBM060080** to **00640CMJ060080**
7. Save the changes and exit Excel.
8. Open your internet browser.
9. Enter the following URL:

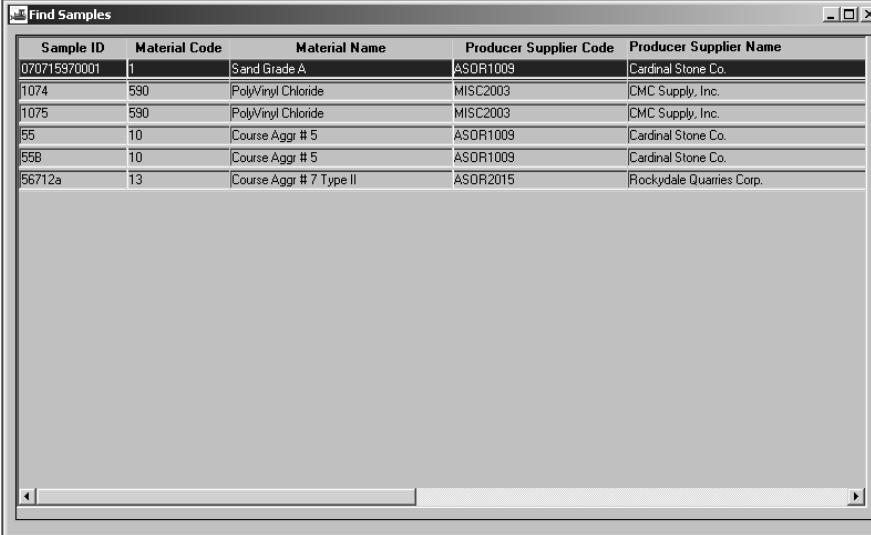
<http://kytcw00b04/materialsapp/multipleuploads.aspx>

This URL is being used for training purposes only. You will be given the proper URL prior to production.

10. Click the **Browse** button.
11. Navigate to  
**c:\SMTRAINS\TRAININGFILES\CONPVMT.xls**
12. Highlight **CONPVMT.xls** and either double-click the file or click the **Open** button in the Choose File window.
13. Click the **Load Sample(s)** button. You should receive the following message “CONPVMT.xls Successfully Uploaded 1 file(s) were uploaded.”

## Finding a Sample

The Find Sample window allows a user to search for Sample Records by Geographic Area, Sampled By, Material Code, Producer/Supplier code, Sample Date, or Contract ID. You may also search for a sample record using any combination of the criteria previously listed. The window allowing the selection of these criteria is called the Find Sample Parameters window. This window will be displayed immediately after opening the Find Sample icon. Once parameters are selected, the data is found and displayed on the original Find Sample window. It is important to note that in order for any sample to be shown, it must meet all of the conditions specified in the Find Sample Parameters window. For example, if two criteria are specified, and a given sample meets only one of the two conditions, it will not be shown on the report.



The screenshot shows a window titled "Find Samples" with a table of data. The table has five columns: Sample ID, Material Code, Material Name, Producer Supplier Code, and Producer Supplier Name. The data rows are as follows:

| Sample ID    | Material Code | Material Name           | Producer Supplier Code | Producer Supplier Name   |
|--------------|---------------|-------------------------|------------------------|--------------------------|
| 070715970001 | 1             | Sand Grade A            | ASDR1009               | Cardinal Stone Co.       |
| 11074        | 590           | PolyVinyl Chloride      | MISC2003               | CMC Supply, Inc.         |
| 11075        | 590           | PolyVinyl Chloride      | MISC2003               | CMC Supply, Inc.         |
| 55           | 10            | Course Aggr # 5         | ASDR1009               | Cardinal Stone Co.       |
| 558          | 10            | Course Aggr # 5         | ASDR1009               | Cardinal Stone Co.       |
| 56712a       | 13            | Course Aggr # 7 Type II | ASDR2015               | Rockydale Quarries Corp. |

The Find Sample Window  
**Figure 5-13**

**Find Sample Parameters**

Find Parameters for the Find Sample Window  
(Samples must meet all criteria specified below.)

Geographic Area: [dropdown]

Sampled By: 54864154

Material Code: [text box]

Producer/Supplier Code: [text box]

Sample Date: 00/00/0000 till 00/00/0000

Contract ID: [text box]

Project: [text box]

Line Item: [text box]

Item Code: [text box]

OK Parameters Cancel Help

The Find Sample Parameters Window  
**Figure 5-14**



## Exercise 5-2

In the following exercise, you will find the samples that were uploaded in Exercise 5-1.

USER **sfoster** Password: **kentucky** Group ID: **DME**

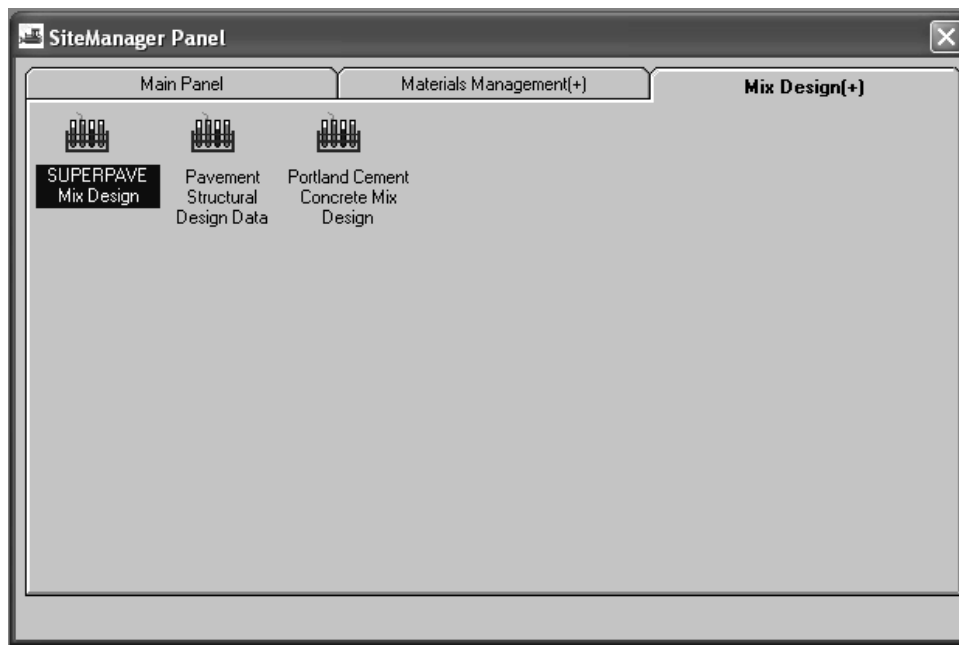
1. On the **Sampling and Testing** panel, **double-click** the **Find Sample** icon.
2. **Click** the **Material Code** check box (ON).
3. Using the right mouse button, **click** the box to the **right** of the **Material Code** field. A magnifying glass will appear as you scroll over this field.
4. From the object menu, **click** the **Search** choice.
5. In the Search window, scroll to and **double-click** material code **40905 – CLASS A CONCRETE**.
6. **Click** the **OK** button.
7. **Click** the **Close** button.
8. **Click** the **Materials Management** tab.

## Mix Designs

KYTC will populate the SUPERPAVE Mix Design and Portland Cement Concrete Mix Design windows through the KYTC Custom Applet Upload procedure. The data in these windows will be view only in SiteManager.

In KYTC, the Pavement Structural Design Data window will be used to capture design data by the Division of Highway Design and the Division of Maintenance. KYTC Divisions should enter the design thickness data in SiteManager after the contract has been awarded.

The Resident Engineers (REs) will create new record(s) with a new Project Type to reflect as-built data so KYTC SiteManager users can query both design data and as-built data.



The Mix Design Panel  
**Figure 5-15**



### Exercise 5-3

In the following exercise, you will access the Mix Design panel.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Materials Management** panel, double-click the **Mix Design** icon.

### SUPERPAVE Mix Designs

In KYTC, population of the SUPERPAVE window shall only be done through the Spreadsheet Applet. All SUPERPAVE Mix Designs that are successfully imported via the Applet will be automatically approved; therefore, the data in SUPERPAVE windows will be view only. Any changes necessary to the data will need to be done by using the “Replacement” function available with the Spreadsheet Applet Application.

### SUPERPAVE Mix Design Description Tab

In general, The SUPERPAVE Mix Design Description tab allows SiteManager users with update rights to create new mix design records or modify details for an existing mix design that has not been approved. SiteManager requires the Mix ID, Material Code, and Producer/Supplier Code fields be completed for each SUPERPAVE mix design captured in the application.

Once a complete design has been entered, and all modifications are complete, the approval of the SUPERPAVE mix design is indicated on this folder tab.

| SUPERPAVE Mix Design Description |               |   |            |
|----------------------------------|---------------|---|------------|
| Description                      | Properties    | Materials                               | Gradations |
| Mix ID:                          | 60088         |   |            |
| Material Code:                   | 20525         | 0.50-IN NOMINAL ASPHALT SURFACE-MIX DES |            |
| Producer Supplier Code:          | AMP020103     | MADISONVILLE PAVING @ MADISONVILLE      |            |
| Designer Name:                   | Loiee Burkeen |   |            |
| AC Type:                         | PG 76-22      |   |            |
| Mix Type:                        | M198          |   |            |
| Effective Date:                  | 09/29/06      | Termination Date:                       | 09/29/07   |
| Approved Date:                   | 09/29/06      | Approved By User ID:                    | jmyers     |

The SUPERPAVE Mix Design Description Window  
**Figure 5-16**



### KYTC SiteManager Field Definitions

| Field Name                                | Description  | Spreadsheet Data Type | Source of Data   | KYTC Spreadsheet Population Decision   |
|---|--|-----------------------|--|--|
| Mix ID<br>(mix_id)                        | <p>Mix Design ID for the Superpave mix design established on the Asphalt Mix (MIXPACK) Spreadsheet.</p> <p>This field is required and must be unique (even if the Contractor is using the same Mix Design on multiple contracts).</p> <p>This field is 15 characters long.</p> | Free-form             | KYTC Spreadsheet Approver  | <p>Mix Design ID established on the Spreadsheet.</p> <p>This field is required and must be unique.</p> <p>KYTC Central Office Mix Designs will use DDYYSSSS:<br/>           DD is the District (Central Office is 00)<br/>           YY is the Year<br/>           SSSS is the Mix ID.</p> <p><b>&lt; Design Data.MIX ID NUM.&gt;</b></p>                                  |
| Design Type<br>(dsn_t)                    | Identifies the type of mix design. This is automatically populated as Superpave.   | Code Table            | Auto-populated by Spreadsheet  | <p>This is a data check field; Design Type must exist.</p> <p>This field will be automatically populated on the Spreadsheet as SUP (Superpave).</p>  |
| Material Code<br>(matl_cd)                | The transportation agency-defined material code for the SUPERPAVE mix that is submitted with the Spreadsheet.  | Free-form             | End-User (Auto-populated by the spreadsheet based on the selection of TYPE OF MIX) | <p>This field should be populated with the appropriate Mix Design Approval Material Code.</p> <p>This is a data check field; Material Code must exist and must be actively produced by the P/S.</p> <p>This field will be automatically populated on the Spreadsheet by the Contractor by selecting the TYPE OF MIX).</p> <p><b>&lt; Design Data.MIX MAT. CODE&gt;</b></p> |
| Producer Supplier Code<br>(prodr_supp_cd) | The transportation agency-defined Producer/Supplier (P/S) Code for a source/location of the Asphalt Plant that is going to produce the Mix Design.   | Free-form             | End-User   | <p>This is a data check field; P/S must exist and must be active.</p> <p><b>&lt; Design Data.CNTR. PROD. #&gt;</b></p>   |

| Field Name                         | Description  | Spreadsheet Data Type | Source of Data  | KYTC Spreadsheet Population Decision   |
|------------------------------------|--|-----------------------|---|--|
| Designer Name (dsnr_nm)            | The name of the designer responsible for the SUPERPAVE mix. This is the Contractor's Technician that submitted the sample. | Free-form             | End-User  | The contractor person who is submitting the mix design for approval.<br><br>User must be an active Sampler (i.e., Material User).<br><br>The Approver must have active "SUPERPAVE MIX DESIGN TECHNOLOGIST" Sampler qualification (and therefore have a SM User ID) for a Material Category of "ASPHALT-MIX DESIGN".<br><br><b>&lt;Design Data.SUBMITTED BY&gt;</b> |
| AC Type (asph_cem_t)               | Identifies the type of asphalt cement.   | Code Table            | End-User (Auto-populated by the spreadsheet based on the selection of TYPE OF MIX)      | This is a data check field; AC Type must exist.<br><br>This field will be automatically populated on the Spreadsheet by the Contractor by selecting the TYPE OF MIX).<br><br><b>&lt;Design Data.BINDER GRADE&gt;</b>   |
| Mix Type (mix_dsn_t xt_t)          | This is the type of mix designed (e.g., A, D, etc.).   | Code Table            | End-User  | This is a data check field; Type of Mix must exist.<br><br><b>&lt;Design Data.TYPE OF MIX&gt;</b><br><b>(Actually &lt;Chart Data."M48"&gt;</b>   |
| Effective Date (effdt)             | Effective date for the SUPERPAVE mix.  | Date                  | KYTC Spreadsheet Approver   | This will be the date the mix is released (i.e., approved) for use.<br><br><b>&lt;Design Data.DATE REL.&gt;</b>  |
| Termination Date (term_dt)         | Date the SUPERPAVE mix is no longer available for use. KYTC will not use this field.                                       | N/A                   | N/A   | Applet will not use this field for this discipline.  |
| Approved Date (apprd_dt)           | Authorization date of the SUPERPAVE mix.   | Date                  | KYTC Spreadsheet Approver (Auto-populated by Spreadsheet based on entered Release Date) | This will be the date the mix is released (i.e., approved) for use.<br><br><b>&lt;Design Data.DATE REL.&gt;</b>  |
| Approved By User ID (apprd_by_uid) | The person who approves the SUPERPAVE mix.   | Free-form             | KYTC Spreadsheet Approver   | This is the KYTC person approving the Mix Design.<br><br>User must be an active Security User.<br><br>The Approver must have active "SUPERPAVE MIX DESIGN TECHNOLOGIST" Sampler qualification (and therefore have a SM User ID) for a Material Category of "ASPHALT-MIX DESIGN".<br><br><b>&lt;Design Data.APPROVED BY&gt;</b>                                     |



Policy and Procedure

## KYTC Procedure

In KYTC, population of table data related to this window's records shall only be done via a Spreadsheet Applet. All SUPERPAVE Mix Designs successfully imported via the Applet will be automatically approved. Any changes necessary to the data will need to be done by using the "replacement" function available with the Spreadsheet Applet.



### Exercise 5-4

In the following exercise, you will view data on the Description folder tab of the SUPERPAVE Mix Design window.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. **Double-click** the **SUPERPAVE** Mix Design icon.
2. **Double-click** the **60088** choice.

## SUPERPAVE Mix Design Properties Tab

The SUPERPAVE Mix Design Properties tab allows SiteManager users with update rights to enter values for specific mix design properties when creating a new or modifying an existing mix design record that has not been approved.

The screenshot shows the 'SUPERPAVE Mix Design Properties' window with the 'Properties' tab selected. The 'Mix ID' is 60088. The window contains several input fields for design parameters:

- N (Design): 100
- N (Initial): 8
- N (Max): 160
- % Gmm @ N (Init): 85.2
- % Gmm @ N (Max): 97.4
- Results Recorded @ N (Design):
  - Equiv Single Axle Loads: 3
  - Optimum AC % Tot Weight: 5.2
  - VMA %: 14.3
  - Lottman TSR: 90
  - Maximum Specific Gravity: 2.478
  - Mixing Temperature: 340 DEGREES FAHRENHEIT
  - Compaction Temperature: 310 DEGREES FAHRENHEIT
  - High Air Temperature: [empty]
  - Dust Proportion: 1.1
  - VFA %: 71.8
  - Sand Equivalent: 67
  - Bulk Specific Gravity: 2.378

The SUPERPAVE Mix Design Properties Window

Figure 5-17

## KYTC SiteManager Field Definitions

| Field Name                         | Description  | Spreadsheet Data Type | Source of Data | KYTC Spreadsheet Population Decision   |
|------------------------------------|--|-----------------------|----------------|--|
| N (Initial)<br>(init_n_dnsty_m)    | The initial compaction gyrations of the specified SUPERPAVE mix.                               | Free-form             | End-User       | Calculated based on data entered by contractor.<br><br><Design Data.Gyration Data.Nini>                |
| N (Max)<br>(max_n_dnsty_m)         | The maximum compaction gyrations of the specified SUPERPAVE mix.                               | Free-form             | End-User       | Calculated based on data entered by contractor.<br><br><Design Data.Gyration Data.Nmax>                |
| N (Design)<br>(dsn_n_dnsty_m)      | The design compaction gyrations of the specified SUPERPAVE mix.                                | Free-form             | End-User       | Calculated based on data entered by contractor.<br><br><Design Data.Gyration Data.Ndes>                |
| % Gmm @ N (Init)<br>(init_n_gmm_p) | The percent of solids by volume @ initial compaction gyrations of the specified SUPERPAVE mix. | Free-form             | End-User       | Calculated based on data entered by contractor.<br><br><Design Data. Design Property.% Gmm @ Ninitial> |

| Field Name  | Description   | Spreadsheet Data Type | Source of Data   | KYTC Spreadsheet Population Decision   |
|---|---|-----------------------|--|--|
| % Gmm @ N (Max)<br>(max_n_gmm_p)                  | The percent of solids by volume @ maximum compaction gyrations of the specified SUPERPAVE mix.  | Free-form             | End-User   | Calculated based on data entered by contractor.<br><br><Design Data. Design Property.% Gmm @ Nmax>   |
| Equiv Single Axle Loads<br>(esals_nbr)            | The ESAL Class. Number of load axle equivalent weight repetitions that pavement can endure before damage occurs.  | Free-form             | End-User (Auto-populated by the spreadsheet based on the selection of TYPE OF MIX) | This field will be automatically populated on the Spreadsheet by the Contractor by selecting the TYPE OF MIX).<br><br>The spreadsheet will assign "0" (i.e., zero) to the "N/A" or " " (i.e., blank) Classes.<br><br><Design Data. ESAL CLASS> |
| Optimum AC % by Tot Weight<br>(opt_ac_pct_tot_wt) | The asphalt content that will be used to produce the specified bituminous mix in the field. This value will include virgin asphalt cement and any provided by the RAP, if applicable. | Free-form             | End-User   | Calculated based on data entered by contractor.<br><br><Design Data. Design Property.% AC>   |
| Dust Proportion<br>(dust_proportion_p)            | The percent of material passing 0.075-mm sieve to the effective asphalt binder content.   | Free-form             | End-User   | Calculated based on data entered by contractor.<br><br><Design Data.Design Property.D/A Ratio>   |
| VMA %<br>(vma_p)                                  | The ratio of the percentage of voids in the mineral aggregate for the specified SUPERPAVE mix.  | Free-form             | End-User   | Calculated based on data entered by contractor.<br><br><Design Data.Design Property.% VMA>   |
| VFA %<br>(vfa_p)                                  | The percentage of VMA filled by the effective asphalt for the specified SUPERPAVE mix.  | Free-form             | End-User   | Calculated based on data entered by contractor.<br><br><Design Data.Design Property.% VFA>   |
| Lottman TSR<br>(lotmn_tsr_m)                      | The tensile strength ratio for the specified SUPERPAVE mix.   | Free-form             | End-User   | Calculated based on data entered by contractor.<br><br><Design Data.Design Property.% TSR without additive>  |
| Sand Equivalent<br>(sand_equivalent_tst)          | The ratio of material passing the No. 30 sieve and retained on the No. 200 sieve to material passing the No. 8 sieve and retained on the No. 200 sieve.                               | Free-form             | End-User   | Calculated based on data entered by contractor.<br><br><Design Data.Design Property.Clay Content (SE) (%)>   |

| Field Name  | Description   | Spreadsheet Data Type | Source of Data  | KYTC Spreadsheet Population Decision   |
|---|---|-----------------------|---|--|
| Maximum Specific Gravity<br>(max_spc_gr)                | The maximum specific gravity for the specified SUPERPAVE mix.                                   | Free-form             | End-User  | Calculated based on data entered by contractor.<br><br><Design Data.Design Property.Maximum Specific Gravity>  |
| Bulk Specific Gravity<br>(bulk_spc_gr_m)                | Bulk specific gravity of the SUPERPAVE mix design @ optimum AC %.                               | Free-form             | End-User  | Calculated based on data entered by contractor.<br>(Unit Weight (lb/ft3) divided by 62.4.)<br><br><Design Data.Design Property.Unit Weight (lb/ft3)>   |
| Mixing Temperature<br>(mix_temp)                        | The mixing temperature for the specified SUPERPAVE mix.   | Free-form             | End-User<br>(Auto-populated by the spreadsheet based on the selection of TYPE OF MIX) | This field will be automatically populated on the Spreadsheet by the Contractor by selecting the TYPE OF MIX.<br><br>This will be assigned by the spreadsheet as the first three characters (to the left of the "/") in the MIX/COMP TEMP field.<br><br><Design Data.MIX/COMP TEMP>  |
| Mixing Temperature Units Type<br>(mix_temp_unit)        | The unit of measure for the associated mixing temperature value, degrees Fahrenheit.            | Code Table            | Auto-populated by Spreadsheet   | This is a data check field; Must exist in TEMP code table.   |
| Compaction Temp<br>(cmpct_temp)                         | The design compaction temperature for the specified SUPERPAVE mix.                              | Code Table            | End-User<br>(Auto-populated by the spreadsheet based on the selection of TYPE OF MIX) | This field will be automatically populated on the Spreadsheet by the Contractor by selecting the TYPE OF MIX.<br><br>This will be assigned by the spreadsheet as the first three characters (to the right of the "/") in the MIX/COMP TEMP field.<br><br><Design Data.MIX/COMP TEMP> |
| Compaction Temperature Units Type<br>(cmpct_temp_unit)  | The unit of measure for the associated design compaction temperature value, degrees Fahrenheit. | Code Table            | Auto-populated by Spreadsheet   | This is a data check field; Must exist in TEMP code table.   |
| High Air Temperature<br>(high_air_temp)                 | Average high air temperature..KYTC will not use this field.                                     | N/A                   | N/A   | Applet will not use this field for this discipline.  |
| High Air Temperature Units Type<br>(high_air_temp_unit) | Unit of measure for high air temperature. KYTC will not use this field.                         | N/A                   | N/A   | Applet will not use this field for this discipline.  |

| Field Name                             | Description  | Spreadsheet Data Type | Source of Data            | KYTC Spreadsheet Population Decision   |
|--|--|-----------------------|---------------------------|--|
| Remarks (rmrks_id)                     | Remarks. KYTC will not use this field.   | N/A                   | N/A                       | Applet will not use this field for this discipline.  |
| Last-Modified User ID (last_modfd_uid) | Last user to modify the record   | Free-form             | KYTC Spreadsheet Approver | This is the KYTC person approving the Mix Design.<br><br>User must be an active Security User.<br><br><b>&lt;Design Data.APPROVED BY&gt;</b> |
| Last-Modified Date (last_modfd_dt)     | Date of the last modification made to the record.                                      | Date                  | Auto-populated by Applet  | System Date the sample was successfully imported into SiteManager.   |
| Air Voids Percentage (air_voids_p)     | N/A (Previously the percentage of air voids in the mix.) KYTC will not use this field. | N/A                   | N/A                       | Applet will not use this field for this discipline.  |



## Exercise 5-5

In the following exercise, you will view data on the Property folder tab of the SUPERPAVE Mix Design window.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. In the SUPERPAVE Mix Design Materials window, click the **Properties** folder tab.

### SUPERPAVE Mix Design Materials Tab

The SUPERPAVE Mix Design Materials tab allows SiteManager users with update rights to list component materials for the mixture when creating a new or modifying an existing mix design record that has not been approved. If sampling and testing was completed for a component material of the mixture, the Sample ID field should be used to associate the sample record with the component material.

| Material Code | Material Full Name | Producer Supplier Code | Producer Supplier Name               |
|---------------|--------------------|------------------------|--------------------------------------|
| 10070         | AGG - #78          | AGP001501              | GREENVILLE QUARRIES @ GREENVILLE     |
| 10310         | ASPH AGG - FINE    | AGP000402              | IMI-SOUTH (DELTA DIVISION) @ STURGIS |
| 10310         | ASPH AGG - FINE    | AGP001501              | GREENVILLE QUARRIES @ GREENVILLE     |

|                              |  |   |
|------------------------------|--|---|
| Material Code:               | <input type="text" value="10070"/>     | <input type="text" value="AGG - #78"/>                        |
| Producer Supplier Code:      | <input type="text" value="AGP001501"/> | <input type="text" value="GREENVILLE QUARRIES @ GREENVILLE"/> |
| Brand Name:                  | <input type="text"/>                   |   |
| Blend Percent:               | <input type="text" value="35"/>        | Sample ID: <input type="text" value="00640RBM0601885U00"/>    |
| Specific Gravity (Apparent): | <input type="text"/>                   | Specific Gravity (Bulk): <input type="text" value="2.67"/>    |

The SUPERPAVE Mix Design Materials Window  
**Figure 5-18**



### KYTC SiteManager Field Definitions

| Field Name                   | Description  | Spreadsheet Data Type | Source of Data                | KYTC Spreadsheet Population Decision  |
|------------------------------|--|-----------------------|-------------------------------|---|
| Mix ID<br>(mix_id)           | <p>Mix Design ID for the Superpave mix design established on the Asphalt Mix (MIXPACK) Spreadsheet.</p> <p>This field is required and must be unique (even if the Contractor is using the same Mix Design on multiple contracts).</p> <p>This field is 15 characters long.</p> | Free-form             | KYTC Spreadsheet Approver     | <p>Mix Design ID established on the Spreadsheet.</p> <p>This field is required and must be unique.</p> <p>KYTC Central Office Mix Designs will use DDYYSSSS:<br/>           DD is the District (Central Office is 00)<br/>           YY is the Year<br/>           SSSS is the Mix ID.</p> <p><b>&lt; Design Data.MIX ID NUM.&gt;</b></p> |
| Design Type<br>(dsn_t)       | Identifies the type of mix design. This is automatically populated as Superpave.   | Code Table            | Auto-populated by Spreadsheet | <p>This is a data check field; Design Type must exist.</p> <p>This field will be automatically populated on the Spreadsheet as SUP (Superpave).</p>   |
| Material Code<br>(matl_cd)   | The transportation agency-defined material code for the SUPERPAVE mix that is submitted with the Spreadsheet.  | Free-form             | End-User                      | <p>This is a data check field; Material Code must exist and must be actively produced by the P/S.</p> <p><b>&lt;Design Data. BINDER CODE&gt;</b><br/> <b>&lt;Design Data. "Aggregate".MAT. CODE&gt;</b></p>   |
| P/S Code<br>(prodr_sup_p_cd) | The transportation agency-defined Producer/Supplier (P/S) Code for a source/location of the Asphalt Plant that is going to produce the Mix Design.   | Free-form             | End-User                      | <p>This is a data check field; must exist and must be active P/S.</p> <p><b>&lt;Design Data. BIND.PROD.#&gt;</b><br/> <b>&lt;Design Data. "Aggregate".AGG. PROD. NO.&gt;</b></p>  |
| Brand Name<br>(brnd_nm)      | This is a freeform text field where the brand name of the component material may be entered. KYTC will not use this field.   | N/A                   | N/A                           | Applet will not use this field for this discipline.   |
| Blend Percent<br>(blnd_p)    | The percentage of the component material contained within the SUPERPAVE mix.   | Free-form             | End-User                      | <p>No edit.</p> <p><b>&lt;&lt;Design Data.Design Property.% AC&gt;</b><br/> <b>&lt;Design Data."Aggregate".%&gt;</b></p>  |

| Field Name                              | Description  | Spreadsheet Data Type | Source of Data  | KYTC Spreadsheet Population Decision  |
|---|--|-----------------------|---|---|
| Specific Gravity (Bulk) (bulk_spc_gr_m) | The bulk specific gravity of the component material contained within the SUPERPAVE mix. This is the number that is used for the Mix Design whether it is the data provided by KYTC testing or the Contractor.  | Free-form             | End-User (and possible override by KYTC Spreadsheet Approver) | This will initially be entered by the end-user. If the state determines this value must be verified, the same test will be run by the state. If the contractor's value is within the tolerance levels set by the state of the state run test results, the contractor's value will remain. Otherwise the KYTC Spreadsheet Approver will replace the contractor's value with the states.<br><br>(NOTE: For each verification test run by the state, the "Results Used" indicator will be set by the KYTC Spreadsheet Approver as applicable.)<br><br><b>&lt;Design Data.G<sub>b</sub>&gt;</b><br><b>&lt;Design Data. "Aggregate".G<sub>sb</sub>&gt;</b> |
| Gsb (Bulk) Source (aprnt_spc_gr_m)      | This field indicates whether or not the testing values used in the Design come from the state or the Contractor.<br><br>Enter an S if the Bulk Specific Gravity data used is provided by the State.<br><br>Enter a C if the Bulk Specific Gravity data used is provided by the Contractor.<br><br>This will need to be indicated on the Spreadsheet. | Code Table            | KYTC Spreadsheet Approver                                     | For each verification test run by the state, the "Results Used" indicator will be set by the KYTC Spreadsheet Approver as applicable.<br><br><b>BINDER: N/A</b><br><b>&lt;Design Data.MCL Aggregate Verification Information.S/C&gt;</b>  |
| Sample ID (smp_id)                      | This is the SiteManager Sample ID for samples that are tested and recorded in SiteManager.<br>Example: Aggregate tests.  | Free-form             | KYTC Spreadsheet Approver                                     | For each verification test run by the state, the Sample ID used for the test will be entered by the KYTC Spreadsheet Approver.<br><br><b>&lt;Design Data.MCL Consensus (&amp; Additional) Verification Information.Sitemanager ID #&gt;</b><br><b>(Always last row of six)</b><br><b>&lt;Design Data. MCL Aggregate Verification Information. SiteManager Agg. ID #&gt;</b>   |
| Last-Modified User ID (last_modfd_uid)  | Last user to modify the record.  | Free-form             | KYTC Spreadsheet Approver                                     | This is the KYTC person approving the Mix Design.<br><br>User must be an active Security User.<br><br><b>&lt;Design Data.APPROVED BY&gt;</b>  |
| Last-Modified Date (last_modfd_dt)      | Date of the last modification made to the record.  | Date                  | Auto-populated by Applet                                      | System Date the sample was successfully imported into SiteManager.  |



## Exercise 5-6

In the following exercise, you will view data on the Materials folder tab of the SUPERPAVE Mix Design window.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Click the **Materials** folder tab.

### SUPERPAVE Mix Design Gradations Tab

The SUPERPAVE Mix Design Gradations tab displays the minimum and/or maximum values for the appropriate sieve sizes captured on the Material Detail window for the mix material. SiteManager users with updates rights may enter the minimum and/or maximum production tolerances for each sieve size for the mix material.

| Sieve Size | * Sieve Value | Minimum Range | Maximum Range | Min Production Tolerance | Max Production Tolerance |
|------------|---------------|---------------|---------------|--------------------------|--------------------------|
|------------|---------------|---------------|---------------|--------------------------|--------------------------|

The SUPERPAVE Mix Design Gradations Window  
**Figure 5-19**



*Because the gradations for each possible SUPERPAVE Mix Design “Material Code” can have a different set of sieves (each with their own unique set of Sieve Size Serial Numbers that could be a different number for the same actual sieve size), there was no way to achieve the mapping of this data from the spreadsheet to SiteManager. (NOTE: The spreadsheet has ALL available sieve sizes for all the material codes, and only expects the user to enter those that are applicable for the one being reported on.) This data will need to be stored on the Sample associated with the Mix Design itself.*



## Exercise 5-7

In the following exercise, you will view data on the Gradations folder tab of the SUPERPAVE Mix Design window.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Click the **Gradations** tab.
2. Click the **Close** button.

## Viewing Portland Cement Concrete Mix Designs

In KYTC, population of table data related to this window's records shall only be done via the Spreadsheet Applet. All PCC Mix Designs successfully imported via the Applet will be automatically approved. Any changes necessary to the data will need to be done by using the "replacement" function available with the Spreadsheet Applet.

| Portland Cement Concrete Mix Design Description |                |                            |            |
|---|----------------|----------------------------|------------|
| Description                                     | Properties     | Materials                  | Gradations |
| Mix ID:   | 00640RBM050001 |                            |            |
| Material Code:                                  | 41000          | CLASS AA                   |            |
| Producer Supplier Code:                         | COP000151      | FEDERAL MATERIALS @ MURRAY |            |
| Designer Name:                                  |                |                            |            |
| Concrete Class Type:                            |                |                            |            |
| Effective Date:                                 | 04/11/06       | Termination Date:          | 00/00/00   |
| Approved Date:                                  | 00/00/00       | Approved By User ID:       |            |

The Portland Cement Concrete Mix Design Description Folder Tab  
**Figure 5-20**

### KYTC SiteManager Field Definitions

| Field Name                                    | Description  | Spreadsheet Data Type | Source of Data                  | KYTC Spreadsheet Population Decision  |
|---|--|-----------------------|---------------------------------|---|
| Mix ID<br>(mix_id)                            | <p>The ID for the Portland Cement Concrete mix design established on the Concrete Mix (CONCMIX) Spreadsheet.</p> <p>This field is required and must be unique</p> <p>This field is 15 characters long.</p> | Free-form             | Auto-populated by Applet        | <p>The Mix ID is auto-populated by the Applet. The Mix Designs will be the Sample ID number on the Header tab (which is currently limited to 14 characters).</p> <p>KYTC will use DDCCIIIYY####:<br/>           DD is the District (Central Office is 00)<br/>           CCC is the Crew number.<br/>           III are the initials of the user who uploads the spreadsheet.<br/>           YY is the Year<br/>           #### is the sequence number.</p> <p><b>&lt;Header.Mix ID&gt;</b><br/> <b>(same as &lt;Header.Sample ID&gt;</b></p> |
| Material Code<br>(matl_cd)                    | <p>The transportation agency-defined ID for the PCC mix that is submitted with the Spreadsheet.</p>  | Code Table            | End-User (i.e., Concrete Class) | <p>This field should be populated with the appropriate Mix Design Approval Material Code.</p> <p>This is a data check field; Material Code must exist and must be actively produced by the P/S.</p> <p>This field should be selected on the Spreadsheet by the Contractor (by selecting the Concrete Class). The Concrete Class will drive the assignment of both the Material Code and Concrete Class (i.e., they are the same for this discipline).</p> <p><b>&lt;Header.Material Code&gt;</b></p>  |
| Design Type<br>(dsn_t)                        | <p>Identifies the type of mix design. This is automatically populated as Portland Cement Concrete.</p>   | Code Table            | Auto-populated by Spreadsheet   | <p>Always assigned as PCC for this discipline.</p> <p><b>&lt;Header.Sample Design Type &gt;</b></p>   |
| Producer Supplier Code<br>(prodr_supplier_cd) | <p>The transportation agency-defined Producer/Supplier (P/S) Code for a source/location of the Plant that is going to produce the Mix Design.</p>  | Free-form             | End-User                        | <p>This is a data check field; P/S must exist and must be active.</p> <p><b>&lt;Header.Producer/Supplier Code&gt;</b></p>   |
| Designer Name<br>(dsnr_nm)                    | <p>The name of the designer responsible for the Portland Cement Concrete mix. This is the Concrete Plant Technician that designed the mix.</p>   | Free-form             | End-User                        | <p>This is the SiteManager User ID of the person submitting the Mix Design for Approval.</p> <p>The Concrete Plant Designer must have KRMCA Level II qualifications (and therefore have a SM User ID).</p> <p><b>&lt;Header.Mix Designer (SM User ID)&gt;</b></p>   |

| Field Name                             | Description   | Spreadsheet Data Type | Source of Data                | KYTC Spreadsheet Population Decision   |
|--|---|-----------------------|-------------------------------|--|
| Concrete Class Type (conc_clas_t)      | Type of concrete (e.g., Class A, Class AA, etc.).   | Date                  | End-User                      | This field should be selected on the Spreadsheet by the Contractor (by selecting the Concrete Class). The Concrete Class will drive the assignment of both the Material Code and Concrete Class (i.e., they are the same for this discipline).<br><br><b>&lt;Blank Design.Concrete Class&gt;</b> |
| Effective Date (effdt)                 | Effective date for the Portland Cement Concrete mix.  | N/A                   | Auto-populated by Applet      | System Date when the spreadsheet is imported into SM.  |
| Termination Date (term_dt)             | Date the Portland Cement Concrete mix is no longer available for use. KYTC will manually populate this field if a Mix Design can no longer be used. | Date                  | Auto-populated by Spreadsheet | Initialize with no termination date (i.e., "00/00/00").<br><br><b>&lt;Header.ZERO&gt;</b>  |
| Approved Date (apprd_dt)               | Identifies when the Portland Cement Concrete mix was approved.  | Code Table            | Auto-populated by Spreadsheet | System Date when the spreadsheet is imported into SM.  |
| Approved By User ID (apprd_by_uid)     | The person who approves the PCC mix.  | Free-form             | KYTC Spreadsheet Approver     | This is the KYTC person approving the spreadsheet.<br><br>The KYTC Approver must have KRMCA Level II qualifications (and therefore have a SM User ID).<br><br><b>&lt;Header.Approver SM User ID&gt;</b>  |
| Last-Modified User ID (last_modfd_uid) | Last user to modify the sample record.  | Free-form             | KYTC Spreadsheet Approver     | This is the KYTC person approving the spreadsheet.<br><br><b>&lt;Header. Approver SM User ID&gt;</b>   |
| Last-Modified Date (last_modfd_dt)     | Date of the last modification made to the sample record.  | Date                  | Auto-populated by Applet      | System Date the sample was successfully imported into SiteManager.   |



### Exercise 5-8

In the following exercise, you will view data on the Description panel of the Portland Cement Concrete Mix Design window.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the **Mix Design** panel, double-click the **Portland Cement Concrete Mix Design** icon.
2. On the **Description** panel, click the **Open** button.
3. Double-click **0060RBM050001**.



### Exercise 5-9

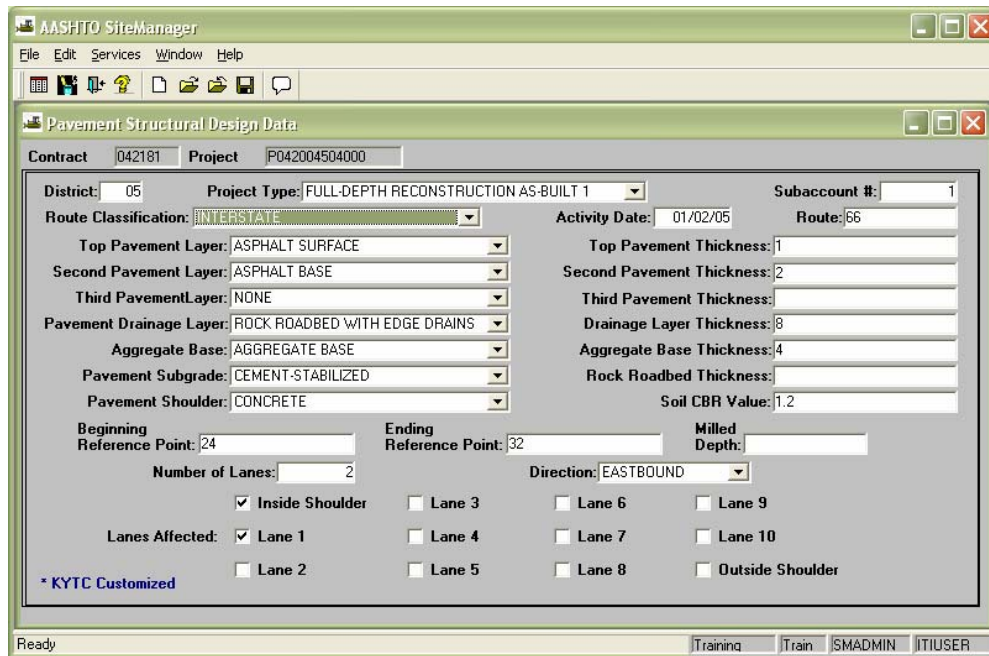
The spreadsheet Applet will only load data associated with the Description tab. The remaining SiteManager related records did not match the spreadsheets record content closely enough to make it feasible to load into this area of SiteManager. Therefore, any remaining related data will be loaded into the associated Sample's Test Template record instead.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. Click the **Close** button.

## Viewing a Pavement Structural Design

The Pavement Structural Design Data window is used to add, update or view pavement structural design data. The window provides a means for capturing “as built” pavement design data for a contract and project.



The Pavement Structural Design Data Window  
**Figure 5-21**

## KYTC SiteManager Field Definitions

| Field Name           | KYTC Populations Policy & Procedure  |
|----------------------|--|
| District             | Enter the District for the project. This is a required field.<br>- For KYTC, this will be the 2-character District ID defined in the SM Administrative Offices window.   |
| Project Type         | Select the type of project (e.g. New Construction, Reconstruction). This is a required field.<br>- For KYTC, the Project Type field indicates if the data is Design or As-Built information as well as the type of project. For example: MAJOR RECONSTRUCTION DESIGN 1, MAJOR RECONSTRUCTION AS-BUILT 1. |
| Subaccount #         | Subaccount number for the project. This is a required field.<br>- KYTC will not use this field for a particular use. However, since this field is required by SiteManager, users should always enter a “1” in this field.  |
| Route Classification | Select the route classification.<br>- For KYTC, Example: INTERSTATE  |
| Activity Date        | Enter the Activity Date. This is a required field.<br>- For KYTC, the Activity Date represents the last modification date of the pavement design.  |



| Field Name                | KYTC Populations Policy & Procedure  |
|---------------------------|--|
| Route                     | Enter the route number of the construction project. This is a required field.  |
| Top Pavement Layer        | Select the top surface treatment. This is a required field.<br>- For KYTC, the Top Pavement Layer represents the riding layer. If OTHER is chosen, note the details in the Remarks bubble. |
| Top Pavement Thickness    | Enter the thickness value for the top pavement layer.  |
| Second Pavement Layer     | Select the second pavement layer. (e.g., Asphalt Base or Binder).<br>- If OTHER is chosen, note the details in the Remarks bubble.   |
| Second Pavement Thickness | Enter the thickness value for the second pavement layer.   |
| Third Pavement Layer      | Select the third pavement layer.<br>- For KYTC, if OTHER is chosen, note the details in the Remarks bubble.  |
| Third Pavement Thickness  | Enter the thickness value for the third pavement layer.  |
| Pavement Drainage Layer   | Select the pavement drainage layer.<br>- For KYTC, the pavement drainage layer represents the internal drainage design.  |
| Drainage Layer Thickness  | Enter the thickness of the drainage layer.   |
| Aggregate Base            | Select the aggregate base.<br>- For KYTC, the only values assigned to this field should be AGGREGATE BASE or NONE.   |
| Aggregate Base Thickness  | Enter the thickness value for the aggregate base.  |
| Pavement Subgrade         | Select the pavement subgrade.<br>- For KYTC, the pavement subgrade represents the rock roadbed or stabilized subgrade.   |
| Rock Roadbed Thickness    | Enter the thickness value for the rock roadbed.  |
| Pavement Shoulder         | Select the pavement shoulder.<br>- For KYTC, the pavement shoulder represents the type of shoulder.  |
| Soil CBR Value            | Enter the Soil CBR Value   |
| Beginning Reference Point | Enter the beginning reference point. This is a required field.<br>- For KYTC, the Beginning Reference Point represents the beginning mile point for the project.                           |

| Field Name             | KYTC Populations Policy & Procedure  |
|------------------------|--|
| Ending Reference Point | Enter the ending reference point. This is a required field.<br>- In KYTC, the Ending Reference Point represents the ending mile point for the project. |
| Milled Depth           | Enter the milled depth.<br>- For KYTC, the Milled Depth is the depth of pavement milling.  |
| Number of Lanes        | Enter the number of lanes involved. This is a required field.  |
| Direction              | Select the direction of the road. Example: EASTBOUND. This is a required field.  |
| <b>Lanes Affected</b>  | <b>Select the lanes that are affected.</b>   |
| Inside Shoulder        | Inside shoulder of lanes affected.   |
| Lane 1                 | Lane 1 of lanes affected.  |
| Lane 2                 | Lane 2 of lanes affected.  |
| Lane 3                 | Lane 3 of lanes affected.  |
| Lane 4                 | Lane 4 of lanes affected.  |
| Lane 5                 | Lane 5 of lanes affected.  |
| Lane 6                 | Lane 6 of lanes affected.  |
| Lane 7                 | Lane 7 of lanes affected.  |
| Lane 8                 | Lane 8 of lanes affected.  |
| Lane 9                 | Lane 9 of lanes affected.  |
| Lane 10                | Lane 10 of lanes affected.   |
| Outside Shoulder       | Outside shoulder of lanes affected.  |

**Table 5-3**



Policy and Procedure

## KYTC Procedure

In KYTC, this window will be used to capture design data by the Division of Highway Design and the Division of Maintenance. KYTC Divisions should enter the design thickness data in SiteManager after the contract has been awarded.

The Resident Engineer (RE) should later create new record(s) with a new Project Type to reflect as-built data so that KYTC can query both design data and the as-built data. For KYTC it is possible to have different thicknesses for different sections of the Project. Therefore, new section and thicknesses should be entered using a new Project Type.

Up to three separate design or as-built Project Types can be entered for each contract project (for example, Design 1, Design 2, Design 3, As-Built 1, As-Built 2, and As-Built 3).



### Exercise 5-10

In the following exercise, you will view a pavement structural design.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the **Mix Design** panel, double-click the **Pavement Structural Design Data** icon.
2. Click the **Open** button. SiteManager displays the Select Contract/Project information list box.
3. In the **Contract** area, scroll to and double-click **AP002**.
4. In the **Project** area, scroll to and double-click **W081004004B1**.
5. In the **Project Type/Direction** area, scroll to and click **MAJOR REHABILITATION AS-BUILT 1**.
6. Click the **OK** button. SiteManager displays the Pavement Structural Design Data window.
7. Click the **Close** button.

## Review for Section 5 Mix Designs

The windows that will display for the Description and Properties folder tab of each Bituminous Concrete Mix Design will be similar, but different.

To modify a structural pavement design:

1. On the **Mix Design** panel, double-click the **Pavement Structural Design Data** icon.
2. Click the **Open** button.
3. In the list box, scroll to and double-click the desired Contract.
4. In the list box, scroll to and double-click the desired Project.
5. In the list box, scroll to and click the desired Project Type/Direction.
6. Click the **OK** button.
7. Press the **Tab** key to advance to the field to be modified.
8. Enter the desired change.
9. Click the **Save** button

## Summary Exercise for Section 5 Mix Designs

In the following exercises, you will view Mix Design data.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. Open SUPERPAVE Mix Design **60232**.
2. Who is entered in the Designer Name field? Scott Quire
3. Open the Portland Cement Concrete Mix Design **00640RBM050002**.
4. What is the Material Code? 40905-CLASS A CONCRETE
5. Open the Pavement Structural Design  
Contract: **AP002**  
Project: **W081004004B1**  
Project Type/Direction: **MAJOR WIDENING DESIGN 1**.
6. What is the Surface Thickness? 4+2.5+2.25+1.25
7. Navigate to the **Materials Management** panel.





Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## Section 6 Approved Lists

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By the end of this learning module, you will be able to do the following:

View and Approved Product

View Test and Fee Information

View a Qualified Lab and Tests

View Sampler Qualifications

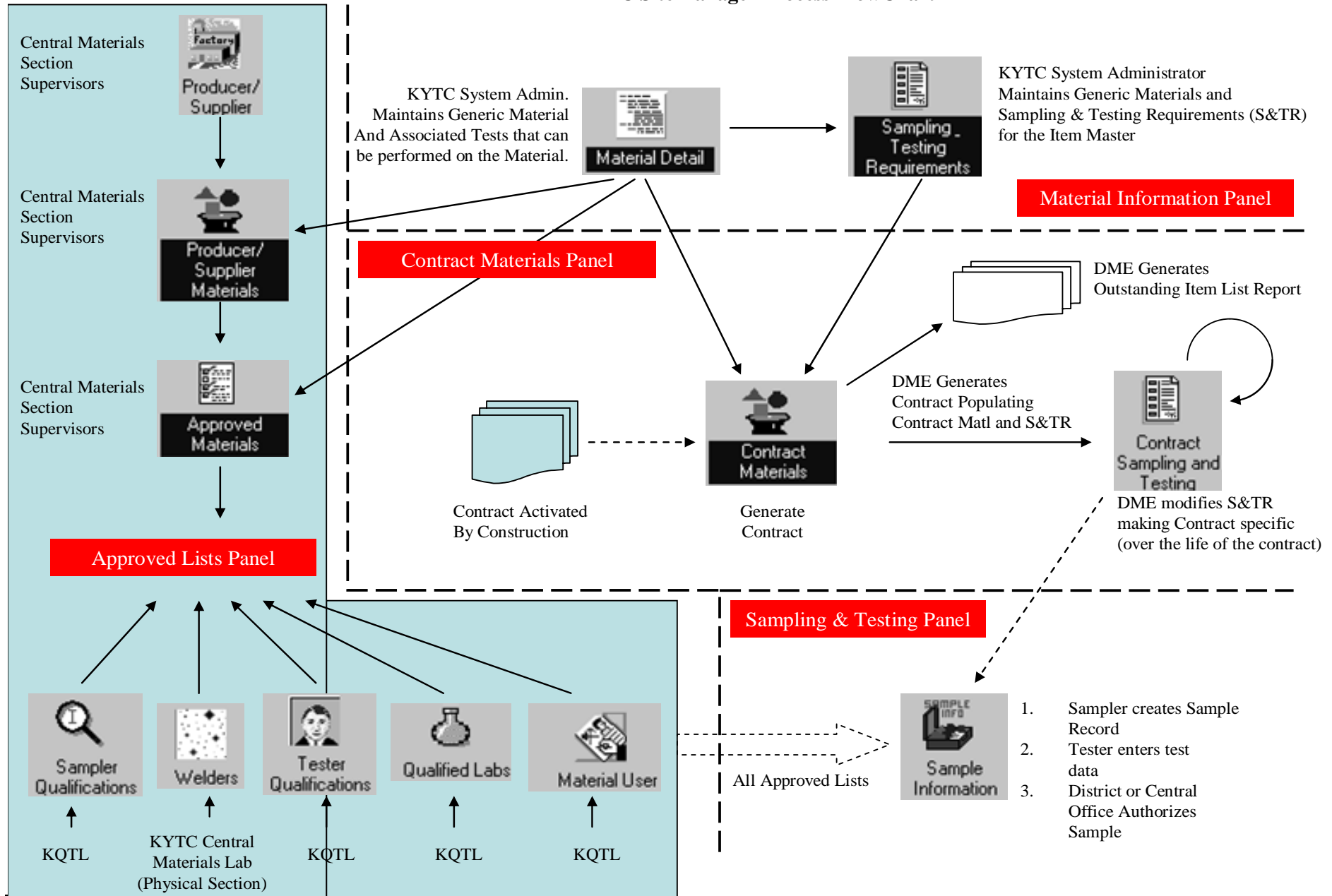
View Welder Qualifications

View Tester Qualifications

Access Approved List Reports

# Approved Lists

## KYTC SiteManager Process FlowChart

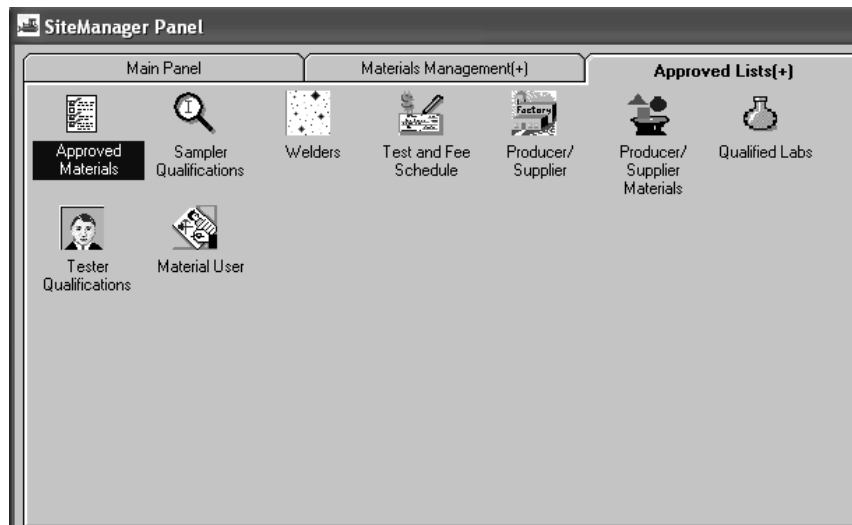




## Approved Lists

The Approved Lists icon, the closet equivalent to Reference Tables for Materials Management, allows access to all approved list related windows. These include:

- Approved Materials
- Sampler Qualifications
- Welders
- Test and Fee Schedule
- Producer/Supplier
- Producer/Supplier Materials
- Qualified Labs
- Tester Qualifications
- Material User



The Approved Lists Panel  
**Figure 6-1**

## Approved Materials Window

The Approved Materials window is used to add and modify the transportation agency-defined list of materials. The approved materials information is used for validation when sample data is entered. A selected material code will display all approved products. An approved product can also have Remarks attached to it.

The screenshot shows a software window titled "Approved Materials". At the top, there are two input fields: "Material Code" with the value "36100" and a text field containing "FLEXIBLE DELINEATOR POST". Below this is a list of product names. The product "SH236SMA" is highlighted. Below the list, there are several fields for the selected product: "Product Name" (SH236SMA), "Effective Date" (00/00/00), "Expiration Date" (00/00/00), "Product Category" (FLEXIBLE DELINEATOR POSTS), "P/S" (ZUMAR INDUSTRIES @ TACOMA, WA) and (CHP341200), and "Acceptance Method" (CERTIFICATION).

| Product Name           |
|------------------------|
| DURA-POST              |
| FD500 WITH FG95 ANCHOR |
| GREENLINE CGDU         |
| GREENLINE SMDW         |
| SH236SMA               |
| SH248GP3               |
| SH248GPR               |

Product Name: SH236SMA  
Effective Date: 00/00/00      Expiration Date: 00/00/00  
Product Category: FLEXIBLE DELINEATOR POSTS  
P/S : ZUMAR INDUSTRIES @ TACOMA, WA      CHP341200  
Acceptance Method: CERTIFICATION

Approved Materials Window  
**Figure 6-2**

**KYTC SiteManager Field Definitions**

| <b>Field Name</b> | <b>KYTC Populations Policy &amp; Procedure</b>   |
|-------------------|--|
| Material Code     | After selection, this field is auto populated with the material with which the product is associated. The material full description for the highlighted material displays to the right of the material code. |
| Product Name      | Enter the full name of the product, brand, model, or system as submitted by the manufacturer.  |
| Effective Date    | Enter the date the product name was added to the approved materials list.  |
| Effective Date    | Enter the expiration dates.<br>- The original Brand Name approvals should expire one year from the approval date.<br>- Re-approvals should be done on a yearly basis.  |
| Product Category  | Select the category to which the selected product belongs.   |
| Producer/Supplier | Select the Producer/Supplier of the approved product and/or brand name.  |
| Acceptance Method | Select the method of acceptance that qualified this product to appear on the approved materials list.  |

Approved Materials Fields Table  
**Table 6-1**



Policy and Procedure

## KYTC Procedure

In KYTC the Approved Materials window displays the association between Product (Brand Name, Model Number, Approved Product, or System) and SiteManager Material Codes. The Products recorded in this window will be displayed on the KYTC Approved List report that is posted to the Internet for public use.

If a Product is entered in the Approved Material window for the purpose of appearing on the KYTC Approved List, then the appropriate Product Category Type must be chosen. If an appropriate Product Category Type is not available, contact the SiteManager System Administrator. Below are the available Product Category Types:

|  |                                |
|--|--------------------------------|
| Anti Stripping Additives                 | Bar Grout Adhesives            |
| Bond Breakers for Dowels                 | Breakaway Sign Post            |
| Bridge Coatings                          | Butyl Rubber Sealants          |
| Concrete Admixtures                      | Concrete Curing Compounds      |
| Concrete Repair Patch                    | Corrosion Inhibitors           |
| Fabric Wrapped backfill Drains           | Flexible Delineator Posts      |
| Gabion Fasteners                         | Geotextiles                    |
| Latex Modifiers for Concrete             | Manhole Adjusting Rings        |
| Manhole Steps                            | Masonry Coating                |
| Mattress Unit Fasteners                  | Non-Shrink Grout               |
| Off Set Blocks                           | Pavement Marking Material      |
| Prefabricated Vertical Drains            | Preformed Compr. Joint Sealers |
| Preformed Expansion Joint Sealers        | Raised Pavement Markers        |
| Retaining Walls                          | Rubber Gaskets                 |
| Sign Sheeting                            | Silicone Rubber Sealants       |
| Structrl Adhesives W/Extnd Contract Time | Traffic Loop Encapsulants      |
| Variable Message Signs                   | Waterproof Membranes           |



## Viewing Sampler Qualifications

The Sampler Qualifications icon may be used to view inspection personnel and their qualifications. In SiteManager, material sampling functions include visual verifications and certificate confirmations. The top data window displays information from the Material User window. The bottom data window displays the specific qualifications of the sampler.



*FYI: For KYTC SiteManager construction users. In version 3.6 of SiteManager, Samplers are now Material Users. This window was formerly Inspectors.*

The screenshot shows a window titled "Sampler Qualifications". It contains a form with the following fields:

- User ID: rmls2
- User Name: Mills, Ross
- Geographic Area: DISTRICT 00
- SM Security User:
- Sampler:
- Tester:
- Global Tester:

Below the form is a table with the following data:

| Type         | Level       | Method              | Effective Date    | Expiration Date   | Active Ind |
|--------------|-------------|---------------------|-------------------|-------------------|------------|
| CONCRETE ACI | ACI LEVEL I | CERTIFICATION CLASS | 07/07/06 00:00:00 | 10/18/10 23:59:59 | Y          |

The Sampler Qualifications Window

Figure 6-3

### KYTC SiteManager Field Definitions

| Field Name       | KYTC Population Policy & Procedure   |
|------------------|--|
| User ID          | Displays the unique identification number assigned to each user entered as a sampler in the system.<br>- This will be maintained via the KQTL-SM Interface.  |
| Name             | Displays the full name of the sampler. The format is Last Name, First Name, MI (Mixed Case).<br>- This will be maintained via the KQTL-SM Interface.   |
| Geographic Area  | Displays the district to which the selected sampler is assigned.<br>- KYTC will not be using this field.   |
| SM User          | An indicator that displays whether the user is a SiteManager user or not.  |
| Tester           | An indicator that displays whether the user is an active Tester or not.<br>- This will be maintained via the KQTL-SM Interface.  |
| Sampler          | An indicator that displays whether the user is an active Sampler or not.<br>- This will be maintained via the KQTL-SM Interface.   |
| Global Tester    | An indicator that displays whether the user is a Global Tester or not.<br>- KYTC will not be using this field.   |
| Type             | The type (i.e. Material Category) of material samples the inspector is certified to sample (e.g. concrete).<br>- This will be maintained via the KQTL-SM Interface.  |
| Level            | Displays the sampler's certification level to complete sampling for the selected Type. In KYTC this is the KQTL Course Subject taken by the Sampler.<br>- This will be maintained via the KQTL-SM Interface. |
| Method           | Displays the method of certifying a sampler to complete certified sampling. In KYTC this will be Certification Classes.<br>- This will be maintained via the KQTL-SM Interface.                              |
| Effective Date   | Displays the date the sampler was certified to collect the Type, Level, and Method of samples selected.<br>- This will be maintained via the KQTL-SM Interface.  |
| Expiration Date  | Displays the date the sampler's status as an approved sampler will expire.<br>- This will be maintained via the KQTL-SM Interface.   |
| Active Indicator | Displays if the sampler qualification is currently active ("Y"), will be active in the future (" "), or is not active ("N"). Display only.   |

Remarks Window Field Table  
**Table 6-2**



Policy and Procedure

## KYTC Procedure

In KYTC, the Sampler Qualifications window will display all samplers and their qualifications. The Sampler Qualifications window will be loaded through an interface from KQTL to SiteManager.

All modifications made to this window should be done by the KQTL to SiteManager interface. The SiteManager System Administrator will have update access to the Sampler Qualifications window. All other SiteManager Users will have Inquiry Access to the Sampler Qualifications window.



### Exercise 6-3

In the following exercise, you will view an existing sampler.

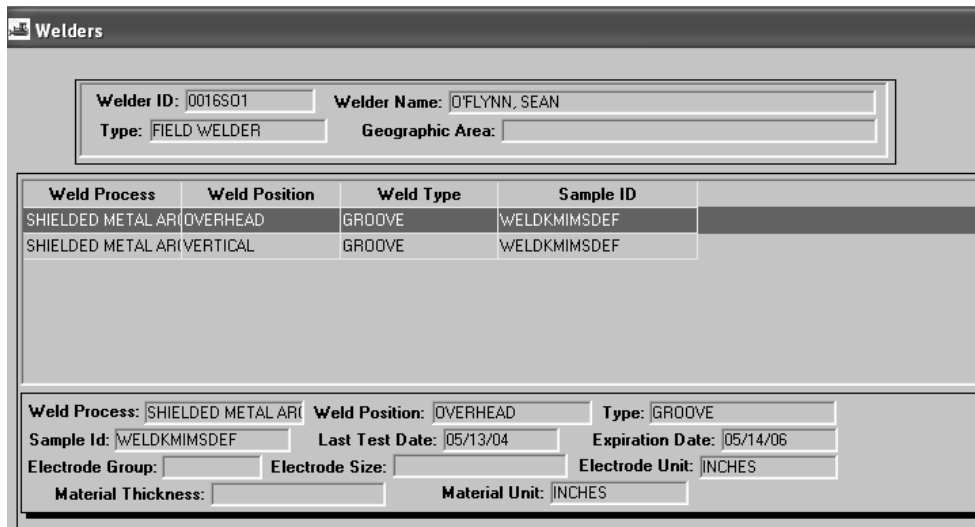
User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Approved Lists** panel, double-click the **Sampler Qualifications** icon.
2. In the **Sampler** list box, scroll to and double-click **rmills2 – Mills, Ross**.
3. What is Ross Mills certified to sample? Concrete ACI
4. When does that certification expire? 10/18/10
5. Click the **Open** button.
6. In the **Sampler** list box, scroll to and double-click your name. If your name is not in the list, select another name.
7. Click the **Close** button.



## Viewing Welder Qualifications

The Welders window allows the user to view Welder Qualifications.



The Welder Window

Figure 6-4

## KYTC SiteManager Field Definitions

| Field Name      | KYTC Population Policy & Procedure   |
|-----------------|--|
| Welder ID       | The unique identification number assigned to each welder entered in the system<br>The format for the Welder ID is<br>#####FL1<br>##### - Last four digits of the welders SSN number<br>F – Welders first Initial<br>L – Welders last Initial<br>1, if a second welder has the same four last digits and First and Last Initial, this number will become 2, 3, 4... |
| Welder Name     | Enter the full name of the welder.<br>- Format will be Last Name, First Name, MI (Mixed Case).   |
| Geographic Area | The geographic area in which the person is located.<br>- Enter the District of the welder, if applicable. Otherwise this field may be left blank.  |
| Type            | The type of welds this welder can perform.<br>- In KYTC, this is indicated as Field Welder, Tack Welder, or Field and Tack Welder.   |
| Weld Process    | The process that the welder is qualified to perform.<br>- Options are either Mig or Shielded Metal Arc.  |
| Weld Position   | The position for which the welder took the weld test on the given process.<br>- For example, if the weld test is for a vertical position, enter Vertical.<br>- If this is for a Tack weld, enter Tack in this field.<br>- Options for this field include Flat, Horizontal, Overhead, Vertical, and Tack.   |
| Weld Type       | The type of welding for which the welder was tested.<br>- Options for this field include Fillet, Groove, and Tack.   |

| Field Name         | KYTC Population Policy & Procedure   |
|--------------------|--|
| Sample ID          | The ID of the Sample that was used to qualify the welder. <ul style="list-style-type: none"> <li>- In KYTC, this field will be used to indicate whether the welder's qualification was acquired from KYTC or at an independent welding school.</li> <li>- If the Sample ID is WELDSCHOOLTEST, then the welder was qualified by a school. If the Sample ID WELDCENTRALOFF, then the welder was qualified by the KYTC Central Materials Laboratory.</li> </ul> 📄 NOTE: If the Sample ID is WELDKMIMSDEF, then the Welder was migrated from the KMIMS system. This Sample ID should not be entered for any new Welders. |
| Last Test Date     | Enter the date the welder last took a test for this qualification.   |
| Expiration Date    | Enter the date this qualification will expire. <ul style="list-style-type: none"> <li>- Two years from the date the test was taken.</li> </ul>   |
| Electrode Group    | Select the appropriate electrode group. <ul style="list-style-type: none"> <li>- For example, E6010, E6011, or E70, E71 are valid entries.</li> </ul>  |
| Electrode Size     | Select the appropriate electrode size. <ul style="list-style-type: none"> <li>- For example 5/64 to 1/8 and .045 are valid entries.</li> </ul>   |
| Electrode Unit     | Select the electrode unit. <ul style="list-style-type: none"> <li>- 'Inches' is the only available option.</li> </ul>  |
| Material Thickness | Enter the actual thickness of the specimen. <ul style="list-style-type: none"> <li>- If the thickness is over one inch, input "unlimited thickness" in this field.</li> <li>- If this is for a tack weld, then input "Rebar" in this field.</li> </ul>   |
| Material Unit      | Select the material unit. <ul style="list-style-type: none"> <li>- 'Inches' is the only available option.</li> </ul>   |

Welder Window Fields Table  
**Table 6-3**



Policy and Procedure

## KYTC Procedure

The Welders window is updated and modified by the Physical Section of the KYTC Central Materials Laboratory.

1. Once a welder has been tested and qualified to conduct welds for KYTC, a representative from the Physical Section of the Central Office should enter the welder in SiteManager in the Welders window.
2. Welders should be entered according to the instructions in the field table below. The selections that are chosen should be based on the test the welder performed.
3. The welder's Personal contact information should be entered in the Address fields.
4. The Physical Section will enter the address of the last school attended in the Company information fields.
5. The Physical Section will distribute the Welder Card, Approval Letter, and Welder Form to the qualified welder.
6. If the Welder does not pass the weld test, then enter the Welder and the test information into SiteManager. The Last Test Date and the Expiration Date should be entered as the same date.

Welder Schools are entered in the Producer/Supplier window in SiteManager.



### Exercise 6-4

In the following exercise, you will view an existing welder.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Approved Lists** panel double-click the **Welders** icon.
2. Click the **Open** button located on the toolbar.
3. Click the **Welder Name** column heading to sort alphabetically.



*Hint: A welder appears in the Welders Selection List once for each qualification he has attained. Therefore, the welders name may appear multiple times in the selection list. You can choose any of the records with the welder's name. Selecting any of the rows with the welders name will open the welder window. The welder window will display all of his qualifications in one window.*

4. In the **Welder Name** list box, scroll to and double-click **Jackson, Dennis**
5. When was the last test date for Weld Process **MIG-VERTICAL**?  
10/20/05
6. Click the **Close** button.

## Viewing the Test and Fee Schedule

The Test and Fee Schedule window allows the maintenance of testing fee information.

| Test Method | Test Description                       | Charge Amount | Billing Code |
|-------------|--|---------------|--------------|
| AG%CRUSHED  | PERCENT CRUSHED PARTICLES              | \$50.00       |              |
| AG%SHALE    | SHALE                                  | \$40.00       |              |
| AGALKCARB   | ALKALI CARBONATE REACTIVITY            | \$700.00      |              |
| AGCLAYLUMP  | CLAY LUMP                              | \$5.00        |              |
| AGCLAYPART  | CLAY LUMPS AND FRIABLE PARTICLES       | \$60.00       |              |
| AGCOLLIGCR  | COAL AND LIGNITE COARSE                | \$55.00       |              |
| AGCOLLIGFN  | COAL AND LIGNITE FINE                  | \$100.00      |              |
| AGCRGRVABS  | SPECIFIC GRAVITY AND ABSORPTION COARSE | \$60.00       |              |
| AGCRSQUAL   | COARSE AGGREGATE QUALITY               | \$350.00      |              |
| AGDRYSIEVE  | DRY SIEVE ANALYSIS                     | \$50.00       |              |
| AGFINEQUAL  | FINE AGGREGATE QUALITY                 | \$205.00      |              |
| AGFLATELON  | FLAT AND ELONGATED                     | \$50.00       |              |
| AGFNGRVABS  | SPECIFIC GRAVITY AND ABSORPTION FINE   | \$60.00       |              |
| AGFRZTHAW   | FREEZE THAW                            | \$2,000.00    |              |
| AGK200&T27  | WET SIEVE KY                           | \$100.00      |              |
| AGKY-200    | FINER THAN NO. 200 KY                  | \$40.00       |              |
| AGKYSNDCRS  | SOUNDNESS COARSE KY METHOD             | \$200.00      |              |
| AGLIGHTWT   | LIGHTWEIGHT PARTICLES                  | \$100.00      |              |
| AGLIMECERT  | AGRICULTURAL LIMESTONE CERTIFICATION   | \$5.00        |              |
| AGORGIMPUR  | ORGANIC IMPURITIES                     | \$45.00       |              |
| AGPETROG    | PETROGRAPHIC ANALYSIS                  | \$1,000.00    |              |
| AGPOREINDX  | PORE INDEX                             | \$100.00      |              |
| AGSANDEQUL  | SAND EQUIVALENT                        | \$75.00       |              |
| AGT104CRS   | SOUNDNESS COARSE AASHTO T-104          | \$200.00      |              |
| AGSVEMNFLR  | SIEVE ANALYSIS OF MINERAL FILLER       | \$35.00       |              |
| AGT104FN    | SOUNDNESS FINE AASHTO T-104            | \$200.00      |              |
| AGT-11      | FINER THAN NO. 200 AASHTO              | \$40.00       |              |
| AGT11&T27   | WET SIEVE AASHTO                       | \$90.00       |              |
| AGUNITWT    | UNIT WEIGHT                            | \$35.00       |              |

The Testing and Fee Schedule Window

Figure 6-5

## KYTC SiteManager Field Definitions

| Field Name       | KYTC Population Policy & Procedure   |
|------------------|--|
| Test Method      | Displays unique identifier of a test method. The identifier of a test template or the standard AASHTO tests included in SiteManager.                                       |
| Test Description | Displays the descriptive name given to the test method. The description given on a test template or the standard AASHTO tests included in SiteManager.                     |
| Charge Amount    | Enter the amount (positive number) charged to perform the test. Only required for KYTC defined test templates (not for any standard AASHTO tests included in SiteManager). |
| Billing Code     | The agency-defined billing code.<br>- KYTC will not be using this field.   |

The Test and Fee Schedule Window Fields Table

Table 6-4



Policy and Procedure

## KYTC Procedure

In KYTC, the Test and Fee Schedule window displays the Test Templates and the associated test charges that are utilized in the Test Charge Interface.

When a new Test Method is added to SiteManager (via the Material Test Template facility), the System Administrator will need to enter the applicable Charge Amount corresponding to the new test in this window.

The SiteManager System Administrator will have update access to the Test and Fee Schedule window. All other SiteManager Users will have Inquiry Access to the Test and Fee Schedule window.



### Exercise 6-5

In the following exercise, you will view testing fee information.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the Approved Lists panel, double-click the Test and Fee Schedule icon.
2. What is the Charge Amount for AG%SHALE?     \$40.00
3. Click the **Close** button.

## Viewing Producer/Supplier

The Maintain Producer/Supplier window is used to view information on any organization that produces or supplies materials used by the Kentucky Transportation Cabinet. This data is used to identify plant information and to access contact information.

The Producer/Supplier Window

Figure 6-6

## Producer/Supplier Description Tab

In KYTC, the Description folder tab on the Producer/Supplier window should be populated in accordance with the field table definitions below.

The Producer Supplier Code is 9 characters with the following scheme:  
 LL(P,S, or W)#####.

### KYTC SiteManager Field Definitions

| Code Format | Description  |
|-------------|--|
| LL          | LL is the Lab Section Abbreviation. <ul style="list-style-type: none"> <li>▪ AM – Asphalt Mixtures</li> <li>▪ AG – Aggregates</li> <li>▪ LA – Liquid Asphalt</li> <li>▪ CO – Concrete/Cement</li> <li>▪ CH – Chemistry</li> <li>▪ PH – Physical</li> <li>▪ GT – Geotech</li> </ul> |
| P, S, or W  | (P, S, W) is used to indicate if it is a Producer (P), Supplier (S), or Welder (W). If additional letters are needed, contact the SiteManager System Administrator.  |
| #####       | ##### is a numbering scheme established by each of the Lab Sections.   |

The Producer/Supplier Code Description Table

Table 6-5

### KYTC SiteManager Field Definitions

| Section           | Description  |    |                         |        |                      |      |  |      |   |    |  |
|-------------------|--|----|-------------------------|--------|----------------------|------|--|------|---|----|--|
| Asphalt Mixtures  | <p>Example: AM (P or S) @@ \$\$ ## (AMP060104)</p> <table border="1"> <tr> <td>AM</td> <td>Asphalt Mixtures</td> </tr> <tr> <td>P or S</td> <td>Producer or Supplier</td> </tr> <tr> <td>@@</td> <td>Two digits corresponding to the number of the District responsible for the Asphalt Mixing Plant in question.</td> </tr> <tr> <td>\$\$</td> <td>Two digits corresponding to the type of asphalt mixing plant. (01 is batch, 02 is modified batch, 03 is drum, and 04 is continuous)</td> </tr> <tr> <td>##</td> <td>An increasing sequential number for that type of plant in that district. (For example: The fourth batch plant for District #6 is AMP060104. The tenth drum plant in District 12 is AMP120310.)</td> </tr> </table> | AM | Asphalt Mixtures        | P or S | Producer or Supplier | @@   | Two digits corresponding to the number of the District responsible for the Asphalt Mixing Plant in question. | \$\$ | Two digits corresponding to the type of asphalt mixing plant. (01 is batch, 02 is modified batch, 03 is drum, and 04 is continuous) | ## | An increasing sequential number for that type of plant in that district. (For example: The fourth batch plant for District #6 is AMP060104. The tenth drum plant in District 12 is AMP120310.) |
| AM                | Asphalt Mixtures   |    |                         |        |                      |      |  |      |   |    |  |
| P or S            | Producer or Supplier   |    |                         |        |                      |      |  |      |   |    |  |
| @@                | Two digits corresponding to the number of the District responsible for the Asphalt Mixing Plant in question.   |    |                         |        |                      |      |  |      |   |    |  |
| \$\$              | Two digits corresponding to the type of asphalt mixing plant. (01 is batch, 02 is modified batch, 03 is drum, and 04 is continuous)  |    |                         |        |                      |      |  |      |   |    |  |
| ##                | An increasing sequential number for that type of plant in that district. (For example: The fourth batch plant for District #6 is AMP060104. The tenth drum plant in District 12 is AMP120310.)   |    |                         |        |                      |      |  |      |   |    |  |
| Aggregates        | <p>Example: AG (P or S) @@@@ ## (AGP002501)</p> <table border="1"> <tr> <td>AG</td> <td>Aggregate Lab</td> </tr> <tr> <td>P or S</td> <td>Producer or Supplier</td> </tr> <tr> <td>@@@@</td> <td>Sequential Numbers under each type of Aggregate.</td> </tr> <tr> <td>##</td> <td>Aggregate Type Code (01 Limestone, 02 Sand and Gravel, etc.)</td> </tr> </table>   | AG | Aggregate Lab           | P or S | Producer or Supplier | @@@@ | Sequential Numbers under each type of Aggregate.   | ##   | Aggregate Type Code (01 Limestone, 02 Sand and Gravel, etc.)  |    |  |
| AG                | Aggregate Lab  |    |                         |        |                      |      |  |      |   |    |  |
| P or S            | Producer or Supplier   |    |                         |        |                      |      |  |      |   |    |  |
| @@@@              | Sequential Numbers under each type of Aggregate.   |    |                         |        |                      |      |  |      |   |    |  |
| ##                | Aggregate Type Code (01 Limestone, 02 Sand and Gravel, etc.)   |    |                         |        |                      |      |  |      |   |    |  |
| Liquid Asphalt    | <p>Example: LA (P or S) @@ \$\$ ##</p> <table border="1"> <tr> <td>LA</td> <td>Liquid Asphalt Lab</td> </tr> <tr> <td>P or S</td> <td>Producer or Supplier</td> </tr> <tr> <td>@@</td> <td>Material Type</td> </tr> <tr> <td>\$\$</td> <td>Company</td> </tr> <tr> <td>##</td> <td>Location</td> </tr> </table>  | LA | Liquid Asphalt Lab      | P or S | Producer or Supplier | @@   | Material Type  | \$\$ | Company   | ## | Location   |
| LA                | Liquid Asphalt Lab   |    |                         |        |                      |      |  |      |   |    |  |
| P or S            | Producer or Supplier   |    |                         |        |                      |      |  |      |   |    |  |
| @@                | Material Type  |    |                         |        |                      |      |  |      |   |    |  |
| \$\$              | Company  |    |                         |        |                      |      |  |      |   |    |  |
| ##                | Location   |    |                         |        |                      |      |  |      |   |    |  |
| Concrete / Cement | <p>Example: CO (P or S) ## @@@@</p> <table border="1"> <tr> <td>CO</td> <td>Concrete/Cement Section</td> </tr> <tr> <td>P or S</td> <td>Producer or Supplier</td> </tr> <tr> <td>##</td> <td>Two digit value representing the type of company.</td> </tr> <tr> <td>@@@@</td> <td>Four digit value sequentially assigned to each type of company</td> </tr> </table>  | CO | Concrete/Cement Section | P or S | Producer or Supplier | ##   | Two digit value representing the type of company.  | @@@@ | Four digit value sequentially assigned to each type of company  |    |  |
| CO                | Concrete/Cement Section  |    |                         |        |                      |      |  |      |   |    |  |
| P or S            | Producer or Supplier   |    |                         |        |                      |      |  |      |   |    |  |
| ##                | Two digit value representing the type of company.  |    |                         |        |                      |      |  |      |   |    |  |
| @@@@              | Four digit value sequentially assigned to each type of company   |    |                         |        |                      |      |  |      |   |    |  |

| Section   | Description  |  |
|-----------|--|--|
| Chemistry | Example: CH (P or S) ## @@@@   |  |
|           | CH   | Chemical Section   |
|           | P or S   | Producer or Supplier   |
|           | ##   | Two digit value relating the producer/supplier to the generic type of material produced or supplied. |
| @@@@      | Four digit value sequentially assigned to producers of each generic material type. |  |
| Physical  | Example: PH (P or S or W) # @@@@   |  |
|           | PH   | Physical Section   |
|           | P or S or W  | Producer or Supplier or Welder School  |
|           | #  | This is a digit 0-9 which indicates one of the 10 subdivisions for Physical materials.               |
| @@@@      | Five digit sequence number   |  |
| Geotech   | Example: GT (P or S) #####   |  |
|           | GT   | Geotech  |
|           | P or S   | Producer or Supplier   |
|           | #####  | Six digit sequence number  |

Description of Producer/Supplier Codes for Each Lab Section  
**Table 6-6**



**KYTC SiteManager Field Definitions**

| <b>Field Name</b>      | <b>KYTC Population Policy &amp; Procedure</b>  |
|------------------------|--|
| Producer Supplier Code | Enter the unique identifier of the producer and/or supplier approved to provide materials.<br>- See table above.   |
| Producer Supplier Type | Enter the identified producer/source for which the listed organization has been categorized.<br>- See paragraph above.   |
| Producer Supplier Name | Enter the full name of the Producer/Supplier in all capital letters.   |
| Vendor ID              | KYTC will not be using this field.   |
| Geographic Area        | If the Producer/Supplier does not reside in the State of Kentucky, select 'OUT OF STATE'.  |
| Location               | KYTC will not be using this field.   |
| Approval Level         | Select the level of approval.  |
| Location Description   | Enter the actual location if the Producer/Supplier is located out of state.  |
| DBE                    | KYTC will not be using this field.   |
| Contact                | Enter the name of the person that will be displayed on the KYTC List of Approved Materials Report. In the case of a welder school, this will be the instructor for the school. |
| Status                 | Select the status of the source.   |
| Status Date            | Auto populated with the date of when the status was changed.   |
| Last Modified User ID  | Auto populated with the User ID of the last person to modify the Producer/Supplier record.   |
| Last Modified Date     | Auto populated with the date the Producer/Supplier record was last modified on.  |

The Producer/Supplier Description Tab Fields Table  
**Table 6-7**



Policy and Procedure

## KYTC Procedure

In KYTC, the Producer/Supplier window is used to capture information on Producers, Suppliers, and Plants. (NOTE: Welder Schools will also be stored as a Producer by the Physical Section.) Each material section is responsible for maintaining the data for their section. Plants should be entered on the Producer/Supplier table as well as in the Plant window. The name and ID for Producer/Supplier and Plant should be identical. There should only be one plant per producer/supplier ID.



### Exercise 6-6

In the following exercise, you will view an existing producer/supplier.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the **Approved Lists** panel, double-click the **Producer/Supplier** icon. SiteManager displays the Maintain Producer/Supplier window.
2. In the Producer/Supplier list box, scroll to and double-click **AGP000111**.
3. Is this an active P/S?           Yes
4. Click the **Plants** tab.

## **Producer/Supplier Plants Tab**

Plants will be entered as a Producer/Supplier and on the Plant folder tab in accordance with the field table definitions below for the purpose of tracking the last inspection date. Plants should be entered on the Producer/Supplier table as well as in the Plant window. The name and ID should be identical for both the Producer/Supplier and Plant. There should only be one plant per producer/supplier ID.

The following Plant Types should be tracked:

- AGGREGATE
- ASPHALT BINDER TERMINAL
- ASPHALT EMULSION TERMINAL
- CONCRETE CENTRAL MIX
- CONCRETE PIPE
- CONCRETE TRUCK MIX
- CORRUGATED METAL PIPE
- HDPE PIPE
- HMA BATCH
- HMA CONTINUOUS
- HMA DRUM
- HMA MODIFIED BATCH
- HMA MODIFIED CONTINUOUS
- PRE-CAST
- PRE-STRESSED
- PVC PIPE
- RECYCLED PLANT
- REDISTRIBUTION YARDS
- SEED

**Maintain Producer/Supplier**

Description    **Plants**

Producer/Supplier: AGP000105    KENTUCKY SOLITE CORP @ BROOKS

| Plant ID  | Plant Type | Status | Plant Name                    |
|-----------|------------|--------|-------------------------------|
| AGP000105 | AGGREGATE  | Active | KENTUCKY SOLITE CORP @ BROOKS |

Plant ID: AGP000105    Plant Type: AGGREGATE

Plant Name: KENTUCKY SOLITE CORP @ BROOKS     Portable Plant

Last Inspected Date: 08/01/05    Plant Status: Active

Location:    Geographic Area: DISTRICT 00

Location Description:

The Producer/Supplier Plant Tab Window  
**Figure 6-7**

### **KYTC SiteManager Field Definitions**

| Field Name           | KYTC Population Policy & Procedure   |
|----------------------|--|
| Producer/Supplier    | Auto populates the Producer/Supplier code from the Description folder tab.               |
| Plant ID             | Enter the Plant ID.<br>- This should be the same as the Producer/Supplier ID.            |
| Plant Type           | Select the Plant Type.<br>- See paragraph above.   |
| Status               | Select the status.   |
| Plant Name           | Enter the name of the Plant.<br>- This should be the same as the Producer/Supplier name. |
| Portable Plant       | Select the check box if the plant is portable.   |
| Last Inspected Date  | Enter the date the plant was last inspected.   |
| Location             | KYTC will not be using this field.   |
| Geographic Area      | KYTC will not be using this field.   |
| Location Description | KYTC will not be using this field.   |

The Producer/Supplier Plants Tab Fields Table  
**Table 6-8**



## Exercise 6-7

In the following exercise, you will view an existing producer/supplier plant.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. In the **Plants** list box, verify plant ID **AGP000111**.
2. Is this a portable plant?     No
3. Click the **Close** button.

## Viewing Producer/Supplier Materials

The Producer/Supplier Materials window is used to view materials associated to a specified producer/supplier. An associated material can also have Remarks attached to it.

The screenshot shows a software window titled "Producer / Supplier Materials". At the top, there are two input fields: "Producer/Supplier" with the value "AGP000105" and "KENTUCKY SOLITE CORP @ BROOKS". Below this is a table with the following data:

| Material Code | Material Full Name | Material Category | Active |
|---------------|--------------------|-------------------|--------|
| 10005         | AGG - #1           | AGGREGATE         | Y      |
| 10010         | AGG - #2           | AGGREGATE         | Y      |
| 10015         | AGG - #23          | AGGREGATE         | Y      |
| 10020         | AGG - #3           | AGGREGATE         | Y      |
| 10025         | AGG - #357         | AGGREGATE         | Y      |
| 10030         | AGG - #4           | AGGREGATE         | Y      |
| 10035         | AGG - #467         | AGGREGATE         | Y      |
| 10040         | AGG - #5           | AGGREGATE         | Y      |
| 10045         | AGG - #57          | AGGREGATE         | Y      |

Below the table, there are several input fields for the selected material (Material Code: 10005, Material Full Name: AGG - #1):

- Material Code: 10005
- Material Full Name: AGG - #1
- Material Category: AGGREGATE
- Approval Status: QUALIFIED (dropdown)
- Source Type: (dropdown)
- Effective Date: 02/03/06 12:12:00
- Expiration Date: 00/00/00 00:00:00
- Sample ID: (empty)
- Last Modified Date: 00/00/00
- Last Modified User ID: (empty)

The Producer/Supplier Materials Window  
**Figure 6-8**

In KYTC, the Description folder tab on the Producer/Supplier window should be populated in accordance with the field table definitions below.

### KYTC SiteManager Field Definitions

| Field Name            | KYTC Population Policy & Procedure  |
|-----------------------|---|
| Producer/Supplier     | After selection, displays the unique identifier of the producer/supplier approved to provide materials.   |
| Material Code         | Select the Material Code  |
| Material Full Name    | Displays the material's full name.  |
| Material Category     | Displays the classification type of the material.   |
| Approval Status       | Select the Approval Status.<br>- See table above.   |
| Source Type           | KYTC will not be using this field.  |
| Effective Date        | Enter the effective date when the material became active for the Producer/Supplier. Defaults to current date when a new material is added and must be less than the Expiration Date (if entered). The Effective Date may be greater than the expiration date of the previous inactive row of the same material, if present. |
| Expiration Date       | Enter the expiration date.<br>- Original P/S Material approvals should expire one-year from the approval date.<br>- Re-approvals should be done on a yearly basis.  |
| Sample ID             | KYTC will optionally enter the Sample ID used to qualify or disqualify the material for the selected Producer/Supplier if it is available.  |
| Last Modified Date    | Auto populated with the date the record was last modified.  |
| Last Modified User ID | Auto populated with the User ID of the person who last modified the record.   |

The Producer/Supplier Materials Tab Fields Table  
**Table 6-9**

### Material Code Approval Status

| Status           | Description  |
|------------------|--|
| Qualified        | This P/S is qualified to supply this material.                     |
| Pending          | Material is under review. (but still authorized for use statewide) |
| Project Specific | Material is being evaluated on a specific project.                 |
| Not Qualified    | This P/S is not qualified to supply this material.                 |

The Producer/Supplier Materials Valid Approval Status Table  
**Table 6-10**



Policy and Procedure

## KYTC Procedure

As a material is retested for approval, an Expiration Date for the current Material Code should be entered, and a new Material Code record should be entered with the appropriate Approval Status Type, Sample ID, and Effective Date.

If a P/S should no longer supply a material, enter the date the material is no longer qualified in the Expiration Date field. Do not modify the Approval Status field.

In KYTC, the Producer/Supplier Materials window is used to associate Material Codes to Producers, Suppliers, Manufacturers, and Plants. Each material section is responsible for maintaining the data for their section. If Material Code is not associated to a P/S, contact the appropriate section at the Central Office.



*NOTE: In order for a Producer/Supplier Material to be visible in the List of Approved Materials Report, it must be ACTIVE and have a status of Qualified.*



### Exercise 6-8

In the following exercise, you will view an existing producer/supplier material.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Approved Lists** panel, double-click the **Producer/Supplier Materials** icon.
2. On the toolbar, click the **Open** button.
3. In the list box, scroll to and double-click **AGP000105**.
4. Click Material Code **10005 AGG-#1**.
5. What is the Approval Status? Qualified.
6. Click the **Close** button.



## Viewing Qualified Labs

The Qualified Labs window is used to enter and view testing laboratories and their qualifications. A list of all laboratories from this window shows up when using the search lens of the “Lab ID” documentation function for SiteManager tests associated to a SiteManager sample information record.

The screenshot shows the 'Qualified Labs' window with the following fields and data:

- Lab ID: T0001
- Geographic Area: [Dropdown]
- Lab Name: Central Office Laboratory
- Contact Person: Todd Schrader

| Type      | Method         | Authority | Expiration Date |
|-----------|----------------|-----------|-----------------|
| AGGREGATE | LAB INSPECTION | KYTC      | 12/31/10        |

| Test Method | Test Description                       |
|-------------|--|
| AG%SHALE    | SHALE                                  |
| AGCRGRVABS  | SPECIFIC GRAVITY AND ABSORPTION COARSE |
| AGCRSQUAL   | COARSE AGGREGATE QUALITY               |
| AGDRYSIEVE  | DRY SIEVE ANALYSIS                     |

The Qualified Labs Window  
Figure 6-9

### KYTC SiteManager Field Definitions

| Field Name       | KYTC Population Policy & Procedure  |
|------------------|---|
| Lab ID           | Displays the unique identification number assigned to each lab entered in the system. The SiteManager Lab ID is the KQTL Laboratory Number. Contractor laboratories will begin with a 'C'. KYTC laboratories will begin with a 'T'. |
| Geographic Area  | KYTC will not be using this field.  |
| Lab Name         | Displays the full name of the qualified lab as submitted. If the Laboratory has a Producer/Supplier Number, then this number will display at the end of the Lab Name.   |
| Contact Person   | Displays the full name of a contact person for the selected lab.  |
| Type             | Displays the type of laboratory (e.g. District, Aggregate).   |
| Method           | Lab Inspection is the method of qualification for all laboratories.   |
| Authority        | KYTC is the qualification authority for all laboratories.   |
| Expiration Date  | This field displays the date the laboratory's certification expires.  |
| Test Method      | The unique identifier that indicates the test template / tests that may be completed by the lab.<br>- KYTC will not be using this field.  |
| Test Description | The full name and/or description of the test template highlighted in the Test Method field.<br>- KYTC will not be using this field.   |

The Qualified Labs Window Field Table

**Table 6-11**



Policy and Procedure

### **KYTC Procedure**

The Qualified Labs window will display all laboratories that may be used for testing. The Qualified Labs window will be loaded through an interface from KQTL to SiteManager.

All modifications made to this window should be done by the KQTL to SiteManager interface. The SiteManager System Administrator will have update access to the Qualified Labs window. All other SiteManager Users will have Inquiry Access to the Qualified Labs window.



### Exercise 6-9

In the following exercise, you will view an existing lab.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Approved List** panel, double-click the **Qualified Labs** icon.
2. In the **Lab ID** list box, scroll to and double-click **T0001**.
3. Is lab T0001 qualified to test **AGWEAR-WEAR**? Yes \_\_\_\_\_
4. Click the **Close** button.

## Viewing Tester Qualifications

The Testing Personnel window is used to view testing personnel and their qualifications. Testers in this window are available to associate to a test on the Sample Information window. In SiteManager, material testing functions also include visual verifications and certificate confirmations. The top data window displays information from the Material User window. The bottom data window displays the specific qualifications of the tester.

| Type                   | Level                  | Authority                     | Effective Date    | Expiration Date   | Active Ind |
|------------------------|------------------------|-------------------------------|-------------------|-------------------|------------|
| DHCMTCB Materials Test | Materials Sampler (MS) | Pers(TC) - Certification Test | 01/07/05 00:00:00 | 01/07/10 23:59:59 | y          |

| Test Meth | Test Description                              |
|-----------|---|
| C93016    | HMA Density Test for Pavement Cores           |
| C94014    | Compressive Strength of Concrete Cylinders    |
| C94020    | Early Breaking Strength of Concrete Cylinders |

The Tester Qualifications Window  
**Figure 6-10**

### **KYTC SiteManager Field Definitions**

| <b>Field Name</b> | <b>KYTC Population Policy &amp; Procedure</b>  |
|-------------------|--|
| User ID           | Displays the unique identification number assigned to each user entered as a tester in the system.<br>- This will be maintained via the KQTL-SM Interface.                           |
| Name              | Displays the full name of the Tester. Format will be Last Name, First Name, MI (Mixed Case).   |
| Geographic Area   | Displays the geographic area in which the testing person is located.<br>- KYTC will not be using this field.   |
| SM User           | An indicator that displays whether the user is a SiteManager user or not.  |
| Tester            | An indicator that displays whether the user is an active Tester or not.<br>- This will be maintained via the KQTL-SM Interface.  |
| Sampler           | An indicator that displays whether the user is an active Sampler or not.<br>- This will be maintained via the KQTL-SM Interface.   |
| Global Tester     | An indicator that displays whether the user is a Global Tester or not.<br>- KYTC will not use this field.  |
| Type              | Displays the type of qualification. In KYTC, this is the type of materials the tester is qualified to test (e.g. Aggregate).<br>- This will be maintained via the KQTL-SM Interface. |
| Level             | Displays the level of qualification. In KYTC this is the KQTL Course Subject taken by the tester.<br>- This will be maintained via the KQTL-SM Interface.                            |
| Authority         | Displays the authority by which qualification was judged. In KYTC, this will value will be KYTC.<br>- This will be maintained via the KQTL-SM Interface.                             |
| Effective Date    | Displays the date the qualification became effective.<br>- This will be maintained via the KQTL-SM Interface.  |
| Expiration Date   | Displays the date the qualification expires.<br>- This will be maintained via the KQTL-SM Interface.   |
| Active Indicator  | Displays if the tester qualification is currently active ("Y"), will be active in the future (" "), or is not active ("N"). Display only.  |
| Test Method       | Displays the qualified Test Method(s) allowed via the specified qualification.<br>- This will be maintained via the KQTL-SM Interface.   |
| Test Description  | Displays the description of the Test.  |

The Tester Qualifications Window Field Table  
**Table 6-12**



## Viewing Material User Information

The Material User window allows the Material User Administrator to create, update or delete a Material User’s profile. A Material User can be defined as one or more of three classes (i.e., SiteManager User, Sampler/Inspector and/or Testing Personnel). Sampler/Inspector and Testing Personnel classes will be created and maintained in the Material User window, while SiteManager Users are created and maintained in the User Security window.

The screenshot shows the 'Material User' window with the following details:

- User ID: jrnlls2
- User Name: Mills, Ross
- Geographic Area: DISTRICT 00
- SM Security User:
- Sampler:
- Tester:
- Global Tester:

**Sampler Qualifications**

| Type         | Level       | Method                | Effective Date    | Expiration Date   | Active Ind |
|--------------|-------------|-----------------------|-------------------|-------------------|------------|
| CONCRETE ACI | ACI LEVEL I | CERTIFICATION CLASSES | 07/07/06 00:00:00 | 10/18/10 23:59:59 | Y          |

**Tester Qualifications**

| Type         | Level       | Authority | Effective Date    | Expiration Date   | Active Ind |
|--------------|-------------|-----------|-------------------|-------------------|------------|
| CONCRETE ACI | ACI LEVEL I | KYTC      | 07/07/06 00:00:00 | 07/07/10 23:59:59 | Y          |

The Material User Window

Figure 6-11

## KYTC SiteManager Field Definitions

| Field Name       | KYTC Population Policy & Procedure   |
|------------------|--|
| Type             | The type (i.e. material category) of material samples the sampler is certified to sample (e.g. concrete).<br>- This will be maintained via the KQTL-SM Interface.              |
| Level            | In KYTC this is the KQTL Course Subject taken by the Sampler.<br>- This will be maintained via the KQTL-SM Interface.  |
| Method           | In KYTC this will be Certification Classes.<br>- This will be maintained via the KQTL-SM Interface.  |
| Effective Date   | This field will capture the date the sampler was certified to collect the Type, Level, and Method of samples selected.<br>- This will be maintained via the KQTL-SM Interface. |
| Expiration Date  | This field will capture the date the sampler’s status as an approved sampler will expire.<br>- This will be maintained via the KQTL-SM Interface.                              |
| Active Indicator | Displays if the sampler qualification is currently active (“Y”), will be active in the future (“”), or is not active (“N”).  |

The Material User Window/Sampler Qualification Field Table

Table 6-13

## KYTC SiteManager Field Definitions

| Field Name | KYTC Population Policy & Procedure |
|------------|------------------------------------|
|------------|------------------------------------|

| Field Name       | KYTC Population Policy & Procedure   |
|------------------|--|
| Type             | In KYTC, this is the type of materials the tester is qualified to test (e.g. Aggregate).<br>- This will be maintained via the KQTL-SM Interface. |
| Level            | In KYTC this is the KQTL Course Subject taken by the tester.<br>- This will be maintained via the KQTL-SM Interface.                             |
| Authority        | In KYTC, this will value will be KYTC.<br>- This will be maintained via the KQTL-SM Interface.   |
| Effective Date   | Displays the date the qualification became effective.<br>- This will be maintained via the KQTL-SM Interface.                                    |
| Expiration Date  | Displays the qualification expiration date.<br>- This will be maintained via the KQTL-SM Interface.  |
| Active Indicator | Displays if the tester qualification is currently active ("Y"), will be active in the future (" "), or is not active ("N").                      |

The Material User Window/Tester Qualification Field Table  
**Table 6-14**



Policy and Procedure

## KYTC Procedure

In KYTC, the Material User window will display all samplers and testers with their qualifications. The Material User window will be loaded through an interface from KQTL to SiteManager.

Almost all modifications made to this window should be done by the KQTL to SiteManager interface. However, if a KQTL Inspector is deleted, the System Administrator would then need to go to SM and attempt to delete them there. If deletion is not possible in SiteManager (as the user has historical test qualifications or has been used on a sample as a sampler or tester), then the procedure would be to turn off the user's Sampler & Tester Indicators (so they could no longer be used in either capacity).

The SiteManager System Administrator will have update access to the Material User window. All other SiteManager Users will have Inquiry Access to the Material User window.



### Exercise 6-11

In the following exercise, you will view an existing material user.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. On the **Approved Lists** panel, double-click the **Material User** icon.
2. The Material user should default to the user you opened. Do you know why?  
The user in the previous exercise and SiteManager remembers.
3. What **Sampler Qualifications** are listed for rmills2?  
Concrete ACI
4. Click the **Close** button.



## Approved List Reports

- Aggregate Backlog Report
- Aggregate Source Book Report
- Approved Material Changes
- Expiring Plants Report
- Expiring Product Report
- Material Code Range
- Plant Type Report
- Producer Materials Availability
- Producer Report
- Producer Supplier and Material Code History
- Qualified Welder Report
- Welder Letter Report

## Review for Section 6 Approved Lists

To view an existing approved product:

1. On the **Approved List** panel, double-click the **Approved Materials** icon.
2. Click the desired material.
3. Click **OK**.
4. In the select list at the top, click the desired approved material.
5. Click the **Close** button.

To view an existing producer/supplier:

1. On the **Approved List** panel, double-click the **Producer/Supplier** icon.
2. Click the **Open** button.
3. In the list box, scroll to and click the desired producer supplier.
4. Click **OK**.
5. Click the **Close** button.

To view an existing producer/supplier plant:

- On the **Approved List** panel, double-click the **Producer/Supplier** icon.
- Click the **Open** button.
- Select the desired producer supplier record.
- Click **OK**.
- Click the **Plants** folder tab.
- In the select list at the top, scroll to and click the desired producer/supplier plant.
- Click the **Close** button.

To view an existing producer/supplier material:

1. On the **Approved List** panel, double-click the **Producer/Supplier Materials** icon.
2. Click the desired producer/supplier record.
3. Click **OK**.
4. In the select list at the top, scroll to and click the desired producer/supplier material.
5. Click the **Close** button.

To view an existing lab:

- On the **Approved List** panel, double-click the **Qualified Labs** icon.
- Click the **Open** button.
- In the list box, scroll to and click the desired lab.
- Click **OK**.
- Click the **Close** button.

To view an existing material user:

- On the **Approved List** panel, double-click the **Material User** icon.
- Click the **Open** button.
- Click the desired inspector record.
- Click **OK**.
- Click the **Close** button.

To view an existing Sampler Qualification:

- On the **Approved List** panel, double-click the **Sampler Qualifications** icon.
- Click the **Open** button.
- Click the desired inspector record.
- Click **OK**.
- Click the **Close** button.

To view an existing Tester Qualification:

1. On the **Approved List** panel, double-click the **Tester Qualifications** icon.
2. Click the **Open** button.
3. In the list box, scroll to and click the desired tester.
4. Click **OK**.

Click the **Close** button.

## Summary Exercise for Section 6 Approved Lists

In the following exercise, you will modify approved list data.

User ID: **sfoster**      Password: **kentucky**      Group ID: **DME**

1. Open Welder **ADAMS, ERIC** record. List his certifications.  
Shielded Metal Arc – Overhead and Vertical Groove
2. Open the Producer Supplier record for **AGP000107-Vulcan Const. Materials Co.@ENKA**.  
Who is the contact? Tim Upchurch
3. Open the Sampler Qualifications record for **rmills2-Mills, Ross**.  
What are their qualifications?  
Concrete ACI
4. Open the Tester Qualification record for **rmills2-Mills, Ross**. What test methods are they qualified to perform?  
COCONCCOMP, COCONPLAS, COPRESTRES
5. Navigate to the **Materials Management** panel.





Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

# Appendix A Modifying Approved Lists

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By the end of this learning module, you will be able to do the following:

Enter an Approved Material

Modify Welder Qualifications

Modify a Producer/Supplier, Producer/Supplier Plants, and Producer/Supplier Materials

## Approved Materials Window

The Approved Materials window is used to add and modify the transportation agency-defined list of materials. The approved materials information is used for validation when sample data is entered. A selected material code will display all approved products. An approved product can also have Remarks attached to it.

The screenshot shows a software window titled "Approved Materials". At the top, there are two input fields: "Material Code" with the value "36100" and a text field containing "FLEXIBLE DELINEATOR POST". Below this is a list of product names. The product "SH236SMA" is highlighted. Underneath the list, there are several fields: "Product Name" (SH236SMA), "Effective Date" (00/00/00), "Expiration Date" (00/00/00), "Product Category" (FLEXIBLE DELINEATOR POSTS), "P/S" (ZUMAR INDUSTRIES @ TACOMA, WA) and (CHP341200), and "Acceptance Method" (CERTIFICATION).

| Product Name           |
|------------------------|
| DURA-POST              |
| FD500 WITH FG95 ANCHOR |
| GREENLINE CGDU         |
| GREENLINE SMDW         |
| SH236SMA               |
| SH248GP3               |
| SH248GPR               |

Product Name: SH236SMA  
Effective Date: 00/00/00    Expiration Date: 00/00/00  
Product Category: FLEXIBLE DELINEATOR POSTS  
P/S : ZUMAR INDUSTRIES @ TACOMA, WA    CHP341200  
Acceptance Method: CERTIFICATION

Approved Materials Window  
Figure A-1

| Field Name        | KYTC Populations Policy & Procedure  |
|-------------------|--|
| Material Code     | After selection, this field is auto populated with the material with which the product is associated. The material full description for the highlighted material displays to the right of the material code.               |
| Product Name      | Enter the full name of the product, brand, model, or system as submitted by the manufacturer.  |
| Effective Date    | Enter the date the product name was added to the approved materials list.  |
| Effective Date    | Enter the expiration dates. <ul style="list-style-type: none"> <li>- The original Brand Name approvals should expire one year from the approval date.</li> <li>- Re-approvals should be done on a yearly basis.</li> </ul> |
| Product Category  | Select the category to which the selected product belongs.   |
| Producer/Supplier | Select the Producer/Supplier of the approved product and/or brand name.  |
| Acceptance Method | Select the method of acceptance that qualified this product to appear on the approved materials list.  |

Approved Materials Fields Table  
**Table A-1**



Policy and Procedure

In KYTC, the Approved Materials window displays the association between Product (Brand Name, Model Number, Approved Product, or System) and SiteManager Material Codes. The Products recorded in this window will be displayed on the KYTC Approved List report that is posted to the Internet for public use. In actuality, KYTC is using the Approved Materials window as an “*Approved Products*” process.

If a Product is entered in the Approved Material window for the purpose of appearing on the KYTC Approved List, then the appropriate Product Category Type must be chosen. If an appropriate Product Category Type is not available, contact the SiteManager System Administrator. Below are the available Product Category Types:

- |                                   |                                |
|-----------------------------------|--------------------------------|
| Anti Stripping                    | Bar Grout Adhesives            |
| Additives                         | Breakaway Sign Post            |
| Bond Breakers for Dowels          | Butyl Rubber Sealants          |
| Bridge Coatings                   | Concrete Curing Compounds      |
| Concrete Admixtures               | Corrosion Inhibitors           |
| Concrete Repair Patch             | Flexible Delineator Posts      |
| Fabric Wrapped backfill Drains    | Geotextiles                    |
| Gabion Fasteners                  | Manhole Adjusting Rings        |
| Latex Modifiers for Concrete      | Masonry Coating                |
| Manhole Steps                     | Non-Shrink Grout               |
| Mattress Unit Fasteners           | Pavement Marking Material      |
| Off Set Blocks                    | Preformed Compr. Joint Sealers |
| Prefabricated Vertical Drains     | Raised Pavement Markers        |
| Preformed Expansion Joint Sealers | Rubber Gaskets                 |
| Retaining Walls                   | Silicone Rubber Sealants       |
| Sign Sheeting                     | Traffic Loop Encapsulants      |
| Structrl Adhesives                |                                |
| W/Extnd Contract Time             |                                |
| Variable Message Signs            | Waterproof Membranes           |





## Exercise A-1

In the following exercise, you will create a new approved product for a material.

User ID: **cgayle** Password: **kentucky** Group ID: **COMATL**

1. In the **Approved List panel** (Main Panel→Materials Management→Approved Lists), double click the **Approved Materials** icon.
2. **Select** Material Code **63025-ASPHALT MOP COAT**. In the **Product Name** field, enter **63025**.
3. In the **Product Name** field, enter **SUPER MOP COAT**.
4. In the **Expiration Date** field, type a date that is one year *after* the **Effective Date**.
5. In the **Product Category** drop-down list, click the expand arrow to the right of the current selection and click **WATERPROOF MEMBRANES**.
6. Using the *right* mouse button, click the **P/S** field.
7. From the object menu, click **Search**.
8. In the **Search** window, double-click Producer/Supplier code **LAP400101 SEALMASTER@SANDUSKY OHIO**.
9. In the **Acceptance Method** drop-down list, click the expand arrow to the right of the current selection and click **CERTIFICATION**.
10. Click the **Save** button.
11. Click the **Close** button.
12. **Open** Internet Explorer.
13. Enter the following URL  
<http://kytct00d03/businessobjects/enterprisell5/InfoView/logon.aspx>
14. Enter the following Information to log into the KYTC Crystal Report Site:  
System: kytct00d03  
Username: train#  
Password: train#  
Authentication: Enterprise
15. In the left pane window, **Click** on the Public folder\training\materials\approved list. The main window pane will display a list of reports.
16. Select the **Custom Approved List** report.



*Hint: You can navigate through the report by using the following Crystal Report Navigation buttons*



17. **Close** Internet Explorer.

## Special Instructions for the Remarks Window

The Remarks window outlines specific information that describes free form remarks for the brand-named product.

Each section is responsible for entering the data for the products that their respective section approves. Product information should be entered in accordance with the Field Table below. Additional information may be recorded in the Remarks field. The information recorded in the Remarks field will also display on the KYTC Approved List report.

How to enter data for Brand Names that change:

The product name field should be modified to include the new Brand Name with (AKA Old Product Name) behind the new Brand Name.

The expiration date should be set for one year after the date of the name change.

After one year, create a new record with only the new Product Name.

The old product name will be saved in SiteManager for historical purposes.

| Field Name | KYTC Population Policy & Procedure   |
|------------|--|
| Remark     | <p>Free from text relating to the brand-name product. The following are single line remarks with specific Identifiers that are required in order to populate the List of Approved Materials Report correctly. The identifiers are very specific and must be entered exactly as specified below. Each identifier name will followed by a single dash and then the necessary data for the report on a single line.</p> <p><u>Concrete Admixtures</u><br/> <b>Approved Dosage Range-&lt;data&gt;</b></p> <p><u>Preformed Compression Joint Seal Designs</u><br/> <b>Joint Size-&lt;data&gt;</b><br/> <b>Nominal Width Of Seal-&lt;data&gt;</b></p> <p><u>Bond Breakers For Dowel Bars IN load Transfer Assemblies</u><br/> <b>Normal Application Method-&lt;data&gt;</b></p> <p><u>Fabric Wrapped Backfill Drains</u><br/> <b>Fabric Backfill Class-&lt;data&gt;</b></p> <p><u>Concrete Curing Compounds</u><br/> <b>Curing Compound Class-&lt;data&gt;</b></p> <p><u>Preformed Expansion Joint Seals</u><br/> <b>Seal Size-&lt;data&gt;</b></p> <p><u>Mattresses and Gabions</u><br/> <b>Fastener Note-Include</b></p> |

Remarks Window Field Table  
 Table A-2

## Modifying Welder Qualifications

The Welders window allows the user to modify Welder Qualifications.


The screenshot shows a software window titled "Welders". At the top, there are input fields for "Welder ID" (0016SD1), "Welder Name" (O'FLYNN, SEAN), "Type" (FIELD WELDER), and "Geographic Area". Below this is a table with the following data:

| Weld Process       | Weld Position | Weld Type | Sample ID    |
|--------------------|---------------|-----------|--------------|
| SHIELDED METAL ARC | OVERHEAD      | GROOVE    | WELDKMIMSDEF |
| SHIELDED METAL ARC | VERTICAL      | GROOVE    | WELDKMIMSDEF |

Below the table are several more input fields: "Weld Process" (SHIELDED METAL ARC), "Weld Position" (OVERHEAD), "Type" (GROOVE), "Sample Id" (WELDKMIMSDEF), "Last Test Date" (05/13/04), "Expiration Date" (05/14/06), "Electrode Group", "Electrode Size", "Electrode Unit" (INCHES), and "Material Thickness" (Material Unit: INCHES).

The Welders Window  
**Figure A-2**

| Field Name      | KYTC Population Policy & Procedure  |
|-----------------|---|
| Welder ID       | <p>The unique identification number assigned to each welder entered in the system.</p> <ul style="list-style-type: none"> <li>- Enter the Social Security Number of the Welder.<br/>The format for the Welder ID is<br/>####FL1<br/>#### - Last four digits of the welders SSN number<br/>F – Welders first Initial<br/>L – Welders last Initial</li> <li>- 1, if a second welder has the same four last digits and First and Last Initial, this number will become 2, 3, 4...</li> </ul> |
| Welder Name     | <p>Enter the full name of the welder.</p> <ul style="list-style-type: none"> <li>- Format will be Last Name, First Name, MI (Mixed Case).</li> </ul>  |
| Geographic Area | <p>The geographic area in which the person is located.</p> <ul style="list-style-type: none"> <li>- Enter the District of the welder, if applicable. Otherwise this field may be left blank.</li> </ul>   |
| Type            | <p>The type of welds this welder can perform.</p> <ul style="list-style-type: none"> <li>- In KYTC, this is indicated as Field Welder, Tack Welder, or Field and Tack Welder.</li> </ul>  |
| Weld Process    | <p>The process that the welder is qualified to perform.</p> <ul style="list-style-type: none"> <li>- Options are either Mig or Shielded Metal Arc.</li> </ul>   |

| Field Name         | KYTC Population Policy & Procedure  |
|--------------------|---|
| Weld Position      | The position for which the welder took the weld test on the given process. <ul style="list-style-type: none"> <li>- For example, if the weld test is for a vertical position, enter Vertical.</li> <li>- If this is for a Tack weld, enter Tack in this field.</li> <li>- Options for this field include Flat, Horizontal, Overhead, Vertical, and Tack.</li> </ul>   |
| Weld Type          | The type of welding for which the welder was tested. <ul style="list-style-type: none"> <li>- Options for this field include Fillet, Groove, and Tack.</li> </ul>   |
| Sample ID          | The ID of the Sample that was used to qualify the welder. <ul style="list-style-type: none"> <li>- In KYTC, this field will be used to indicate whether the welder's qualification was acquired from KYTC or at an independent welding school.</li> <li>- If the Sample ID is WELDSCHOOLTEST, then the welder was qualified by a school. If the Sample ID WELDCENTRALOFF, then the welder was qualified by the KYTC Central Materials Laboratory.</li> </ul> <p> NOTE: If the Sample ID is WELDKMIMSDEF, then the Welder was migrated from the KMIMS system. This Sample ID should not be entered for any new Welders.</p> |
| Last Test Date     | Enter the date the welder last took a test for this qualification.  |
| Expiration Date    | Enter the date this qualification will expire. <ul style="list-style-type: none"> <li>- Two years from the date the test was taken.</li> </ul>  |
| Electrode Group    | Select the appropriate electrode group. <ul style="list-style-type: none"> <li>- For example, E6010, E6011, or E70, E71 are valid entries.</li> </ul>   |
| Electrode Size     | Select the appropriate electrode size. <ul style="list-style-type: none"> <li>- For example 5/64 to 1/8 and .045 are valid entries.</li> </ul>  |
| Electrode Unit     | Select the electrode unit. <ul style="list-style-type: none"> <li>- 'Inches' is the only available option.</li> </ul>   |
| Material Thickness | Enter the actual thickness of the specimen. <ul style="list-style-type: none"> <li>- If the thickness is over one inch, input "unlimited thickness" in this field.</li> <li>- If this is for a tack weld, then input "Rebar" in this field.</li> </ul>  |
| Material Unit      | Select the material unit. <ul style="list-style-type: none"> <li>- 'Inches' is the only available option.</li> </ul>  |

Welder Window Fields Table  
 Table A-3



Policy and Procedure

The Physical Section of the KYTC Central Materials Laboratory updates and modifies the Welders

1. Once a welder has been tested and qualified to conduct welds for KYTC, a representative from the Physical Section of the Central Office should enter the welder in SiteManager in the Welders window.
2. Welders should be entered according to the instructions in the field table below. The selections that are chosen should be based on the test the welder performed.
3. The welder's Personal contact information should be entered in the Address fields.
4. The Physical Section will enter the address of the last school attended in the Company information fields.
5. The Physical Section will distribute the Welder Card, Approval Letter, and Welder Form to the qualified welder.
6. If the Welder does not pass the weld test, then enter the Welder and the test information into SiteManager. The Last Test Date and the Expiration Date should be entered as the same date.



## Exercise A-2

In the following exercise, you will modify an existing welder and add a new qualification.

User ID: **cgayle** Password: **kentucky** Group ID: **COMATL**

1. On the **Approved Lists** panel, double-click the **Welders** icon.
2. Click the **Open** button.
3. In the **Select Welder** list box, scroll to and double-click Welder **1544DJ1 – JACKSON, DENNIS**
4. In the **Geographic Area** drop-down list, click the expand arrow to the right of the current selection and click the **DISTRICT 04** choice.
5. Click the **Save** icon.
6. Click the middle data window to change the focus.
7. Click the **New** button.
8. In the **Weld Process** drop-down list, click the expand arrow to the right of the current selection and click **MIG**.
9. In the **Weld Position** drop-down list, click the expand arrow to the right of the current selection and click **OVERHEAD**.
10. In the **Type** drop-down list, click the expand arrow to the right of the current selection and click **GROOVE**.
11. Using the *right* mouse button, click the **Sample ID** field.
12. From the object menu, click the **Search** choice.
13. In the **Search** window, scroll to and double-click **WELDCENTRALOFF**.
14. In the Last Test Date field, type 02/15/06.
15. In the Expiration Date field, type 12/31/10.
16. In the **Electrode Group** field, type **E6010**.
17. In the **Electrode Size** field, type **.045**.
18. In the **Electrode Unit** drop-down list, click the expand arrow to the right of the current selection and click **INCHES**.
19. In the **Material Thickness** field, type **1**.
20. In the **Material Unit** drop-down list, click the expand arrow to the right of the current selection and click **INCHES**.
21. **Click** the **Address** icon located on the toolbar.
22. Ensure **Company Address** is selected in the bottom data window.
23. Enter **Anderson Technical College** in the Address For field.
24. Enter **US 127 South** in field **Line 1**.
25. Enter **Lawrenceburg** in the **City** field.
26. Enter **KY** in the **State/Prov** field.
27. Click the **Save** button.
28. Click the **Close** button.

Now, let's ...

29. Start Internet Explorer.
30. Enter the following URL  
<http://kytct00d03/businessobjects/enterprise115/InfoView/logon.aspx>
31. Enter the following Information to log into the KYTC Crystal Report Site:  
System: **kytct00d03**

Username: **train#**

Password: **train#**

Authentication: **Enterprise**

32. In the left pane window, click the **Public folder\training\materials\approved list** folder. The main window pane will display a list of reports.
33. Select the **Welders Letter Reports** report.

You can navigate through the report by using the following Crystal Report Navigation buttons.



34. Select the **Qualified Welder Report**.
35. Close Internet Explorer.

## Maintain Producer/Supplier

The Maintain Producer/Supplier window is used to view information on any organization that produces or supplies materials used by the Kentucky Transportation Cabinet. This data is used to identify plant information and to access contact information.

The screenshot shows a software window titled "Maintain Producer/Supplier". At the top, there are two tabs: "Description" (which is selected) and "Plants". Below the tabs, the window contains several data entry fields and dropdown menus. The fields are arranged in a grid-like fashion. The "Producer Supplier Code" is "AGP000101" and the "Producer Supplier Type" is "LIMESTONE". The "Producer Supplier Name" is "KENTUCKY STONE COMPANY@FRANKFORT". Other fields include "Vendor ID", "Location", "Location Description", "DBE", "Status" (set to "Active"), "Last Modified User ID" (set to "cgayle"), "Geographic Area" (set to "DISTRICT 07"), "Approval Level" (set to "CENTRAL OFFICE"), "Contact" (set to "FLOYD COLLINS"), "Status Date" (set to "11/09/06"), and "Last Modified Date" (set to "11/09/06").

The Producer/Supplier Window

Figure A-3

### Producer/Supplier Description Folder Tab

In KYTC, the Description folder tab on the Producer/Supplier window should be populated in accordance with the field table definitions below.

The Producer Supplier Code is 9 characters with the following scheme:

LL(P,S, or W)#####.



| Code Format | Description  |
|-------------|--|
| LL          | LL is the Lab Section Abbreviation. <ul style="list-style-type: none"> <li>▪ AM – Asphalt Mixtures</li> <li>▪ AG – Aggregates</li> <li>▪ LA – Liquid Asphalt</li> <li>▪ CO – Concrete/Cement</li> <li>▪ CH – Chemistry</li> <li>▪ PH – Physical</li> <li>▪ GT – Geotech</li> </ul> |
| P, S, or W  | (P, S, W) is used to indicate if it is a Producer (P), Supplier (S), or Welder (W). If additional letters are needed, contact the SiteManager System Administrator.  |
| #####       | ##### is a numbering scheme established by each of the Lab Sections.   |

Produce/Supplier Format Field Table  
 Table A-4

| Section          | Description                                 |  |
|------------------|---|--|
| Asphalt Mixtures | Example: AM (P or S) @@ \$\$ ## (AMP060104) |  |
|                  | AM  | Asphalt Mixtures   |
|                  | P or S                                      | Producer or Supplier   |
|                  | @@  | Two digits corresponding to the number of the District responsible for the Asphalt Mixing Plant in question.   |
|                  | \$\$  | Two digits corresponding to the type of asphalt mixing plant. (01 is batch, 02 is modified batch, 03 is drum, and 04 is continuous)  |
|                  | ##  | An increasing sequential number for that type of plant in that district. (For example: The fourth batch plant for District #6 is AMP060104. The tenth drum plant in District 12 is AMP120310.) |
| Aggregates       | Example: AG (P or S) @@@@ ## (AGP002501)    |  |
|                  | AG  | Aggregate Lab  |
|                  | P or S                                      | Producer or Supplier   |
|                  | @@@@  | Sequential Numbers under each type of Aggregate.   |
|                  | ##  | Aggregate Type Code (01 Limestone, 02 Sand and Gravel, etc.)   |

| Section           | Description                      |  |
|-------------------|----------------------------------|--|
| Liquid Asphalt    | Example: LA (P or S) @@ \$\$ ##  |  |
|                   | LA                               | Liquid Asphalt Lab   |
|                   | P or S                           | Producer or Supplier   |
|                   | @@                               | Material Type  |
|                   | \$\$                             | Company  |
|                   | ##                               | Location   |
| Concrete / Cement | Example: CO (P or S) ## @@@@     |  |
|                   | CO                               | Concrete/Cement Section  |
|                   | P or S                           | Producer or Supplier   |
|                   | ##                               | Two digit value representing the type of company.  |
|                   | @@@@                             | Four digit value sequentially assigned to each type of company                                       |
| Chemistry         | Example: CH (P or S) ## @@@@     |  |
|                   | CH                               | Chemical Section   |
|                   | P or S                           | Producer or Supplier   |
|                   | ##                               | Two digit value relating the producer/supplier to the generic type of material produced or supplied. |
|                   | @@@@                             | Four digit value sequentially assigned to producers of each generic material type.                   |
| Physical          | Example: PH (P or S or W) # @@@@ |  |
|                   | PH                               | Physical Section   |
|                   | P or S or W                      | Producer or Supplier or Welder School  |
|                   | #                                | This is a digit 0-9 which indicates one of the 10 subdivisions for Physical materials.               |
|                   | @@@@@                            | Five digit sequence number   |
| Geotech           | Example: GT (P or S) #####       |  |
|                   | GT                               | Geotech  |
|                   | P or S                           | Producer or Supplier   |
|                   | #####                            | Six digit sequence number  |

Description of Producer/Supplier Codes for Each Lab Section Fields Table  
**Table A-5**

| Field Name             | KYTC Population Policy & Procedure   |
|------------------------|--|
| Producer Supplier Code | Enter the unique identifier of the producer and/or supplier approved to provide materials.<br>- See table above.   |
| Producer Supplier Type | Enter the identified producer/source for which the listed organization has been categorized.<br>- See paragraph above.   |
| Producer Supplier Name | Enter the full name of the Producer/Supplier in all capital letters.   |
| Vendor ID              | KYTC will not be using this field.   |
| Geographic Area        | If the Producer/Supplier does not reside in the State of Kentucky, select 'OUT OF STATE'.  |
| Location               | KYTC will not be using this field.   |
| Approval Level         | Select the level of approval.  |
| Location Description   | Enter the actual location if the Producer/Supplier is located out of state.  |
| DBE                    | KYTC will not be using this field.   |
| Contact                | Enter the name of the person that will be displayed on the KYTC List of Approved Materials Report. In the case of a welder school, this will be the instructor for the school. |
| Status                 | Select the status of the source.   |
| Status Date            | Auto populated with the date of when the status was changed.   |
| Last Modified User ID  | Auto populated with the User ID of the last person to modify the Producer/Supplier record.   |
| Last Modified Date     | Auto populated with the date the Producer/Supplier record was last modified on.  |

The Producer/Supplier Window Field Table  
**Table A-6**



Policy and Procedure

If the Producer/Supplier is a relabeler, then this should be documented in the Remarks bubble.

If a Producer/Supplier is entered in the Producer/Supplier window for the purpose of appearing on the KYTC Approved List, then the appropriate Producer/Supplier Type must be chosen. For example, if you are approved for Epoxy Coaters, and then you get approved for Steel Fabricators, then the user will need to change the value from Epoxy Coaters to Epoxy Coaters and Steel Fabricators. If an appropriate Producer/Supplier Type that encompasses all of the Producer/Suppliers approvals is not available, contact the SiteManager System Administrator. Below are the available Producer/Supplier Types:

- AGGREGATES – GENERAL
- ASPHALT MIXING PLANTS
- CEMENT
- CONCRETE PIPE
- CORRUGATED METAL PIPE
- EMULSIFIED ASPHALT
- EPOXY COATERS
- EPOXY RESIN SYSTEMS
- FERTILIZER
- FLYASH
- GRANITE
- GRAY IRON CASTING
- GUARDRAIL
- HDPE PIPE
- LIGHTWEIGHT AGGREGATE
- LIME
- LIMESTONE
- LOAD TRANSFER ASSEMBLIES
- MATTRESSES AND GABIONS
- MINERAL FILLER
- MISCELLANEOUS
- PERFORMANCE GRADED (PG) BINDERS
- PRE-CAST CONCRETE
- PRE-STRESSED CONCRETE
- QUALIFIED CONCRETE PLANTS
- QUARTZITE
- SILT TRAP TYPE C BAGS
- 
- SAND AND GRAVEL
- SANDSTONE
- SILICA SAND
- SILTSTONE
- SLAG
- SLOTTED DRAIN PIPE
- STEEL FABRICATORS
- STEEL MANUFACTURERS
- STEEL WELDED GRATES
- TRAPROCK
- WASTE MATERIAL – SUPPLIERS ONLY
- WELDERS
- EMULSIFIED ASPHALT AND PERFORMANCE GRADED (PG) BINDERS
- EPOXY COATERS AND STEEL FABRICATORS
- EPOXY COATERS AND STEEL MANUFACTURERS
- EPOXY COATERS AND STEEL FABRICATORS AND STEEL MANUFACTURERS
- HDPE PIPE AND CORRUGATED METAL PIPE
- HDPE PIPE AND CORRUGATED METAL PIPE AND SLOTTED DRAIN PIPE
- PRE-CAST CONCRETE AND CONCRETE PIPE
- PRE-CAST CONCRETE AND QUALIFIED CONCRETE PLANTS
- PRE-CAST CONCRETE AND STEEL FABRICATORS
- PRE-STRESSED CONCRETE AND STEEL FABRICATORS
- SLOTTED DRAIN PIPE AND CORRUGATED METAL PIPE
- STEEL FABRICATORS AND STEEL MANUFACTURERS

If the Producer/Supplier appears on the KYTC List of Approved Materials Report on the Internet according to a Brand Name Product (Approved Materials in SiteManager), or does not appear on the report at all, the Producer/Supplier Type should be classified as Miscellaneous. (Example: Flyash for fill and lightweight products used for embankments.)

In KYTC, the Producer/Supplier window is used to capture information on Producers, Suppliers, and Plants. Each material section is responsible for maintaining the data for their section. Plants should be entered on the Producer/Supplier table as well as in the Plant window. The name and ID for should be identical. There should only be one plant per producer/supplier ID.



*Note: Welder Schools will also be stored as a Producer by the Physical Section. If the school has not been previously added, it will need to be created in the Producer Supplier window.*



*Note: In KYTC, the Remarks window on the Producer/Supplier window should be populated in accordance with the field table definitions below. If Producer/Supplier is a relabeler, add a remark on the record documenting this.*

| Field Name | KYTC Population Policy & Procedure  |
|------------|---|
| Remark     | <p>Free from text relating to the producer/supplier. The following are single line remarks with specific Identifiers that are required in order to populate the List of Approved Materials Report correctly. The identifiers are very specific and must be entered exactly as specified below. Each identifier name will followed by a single dash and then the necessary data for the report on a single line.</p> <p><u>Fly Ash</u><br/> <b>Utility Name-&lt;data&gt;</b><br/> <b>Unit Station-&lt;data&gt;</b><br/> <b>Silo(s)-&lt;data&gt;</b></p> <p><u>Manhole Steps</u><br/> <b>Approved Steps-&lt;data&gt;</b></p> <p><u>Reinforcing Steel Manufacturers</u><br/> <b>Approved Sizes-&lt;data&gt;</b></p> <p><u>Guardrail Manufacturers</u><br/> <b>Brand Marking-&lt;data&gt;</b></p> <p><u>Qualified Concrete Producer</u><br/> <b>County-&lt;data&gt;</b><br/> <b>Scale Exp.-&lt;data&gt;</b><br/> <b>Plant Exp.-&lt;data&gt;</b></p> |

The Producer/Supplier Remarks Comments Field Table  
 Table A-7



## Exercise A-3

In the following exercise, you will create a producer/supplier record.

User ID: **cgayle** Password: **kentucky** Group ID: **COMATL**

1. On the **Approved Lists** panel, double-click the **Producer/Supplier** icon.
2. Click the **New** button.
3. Enter **AGP000101** in the Producer Supplier Code field.
4. In the Producer Supplier Type list, click the expand arrow to the right of the drop-down list, click **LIMESTONE**.
5. In the Producer Supplier Name field, type **KENTUCKY STONE COMPANY@FRANKFORT**.
6. In the Geographic Area field, select District 07.
7. In the **Approval Level** drop-down list, click the expand arrow to the right of the current selection and click **CENTRAL OFFICE**.
8. In the **Contact** field, enter **FLOYD COLLINS**.
9. In the **Status** drop-down list, click the expand arrow to the right of the current selection and click **Active**.
10. Click the **Save** button.
11. Click the **Plants** folder tab.

## Producer/Supplier Plants Folder Tab

Plants will be entered as a Producer/Supplier and on the Plant folder tab in accordance with the field table definitions below for the purpose of tracking the last inspection date. Plants should be entered on the Producer/Supplier table as well as in the Plant window. The name and ID should be identical for both the Producer/Supplier and Plant. There should only be one plant per producer/supplier ID.

The screenshot shows the 'Maintain Producer/Supplier' window with the 'Plants' tab selected. At the top, there are two input fields for 'Producer/Supplier' with the values 'AGP000101' and 'KENTUCKY STONE COMPANY@FRANKFORT'. Below this is a table with the following data:

| Plant ID  | Plant Type | Status | Plant Name               |
|-----------|------------|--------|--------------------------|
| AGP000101 | AGGREGATE  | Active | KENTUCKY STONE@FRANKFORT |

Below the table is a form with the following fields:

- Plant ID: AGP000101
- Plant Type: AGGREGATE (dropdown)
- Plant Name: KENTUCKY STONE@FRANKFORT
- Portable Plant
- Last Inspected Date: 03/31/06
- Plant Status: Active (dropdown)
- Location: (dropdown)
- Geographic Area: DISTRICT 07 (dropdown)
- Location Description: (text field)

The Producer/Supplier Remarks Comments Field Table  
**Table A-8**



| Field Name           | KYTC Population Policy & Procedure   |
|----------------------|--|
| Producer/Supplier    | Auto populates the Producer/Supplier code from the Description folder tab.               |
| Plant ID             | Enter the Plant ID.<br>- This should be the same as the Producer/Supplier ID.            |
| Plant Type           | Select the Plant Type.<br>- See paragraph above.   |
| Status               | Select the status.   |
| Plant Name           | Enter the name of the Plant.<br>- This should be the same as the Producer/Supplier name. |
| Portable Plant       | Select the check box if the plant is portable.   |
| Last Inspected Date  | Enter the date the plant was last inspected.   |
| Location             | KYTC will not be using this field.   |
| Geographic Area      | KYTC will not be using this field.   |
| Location Description | KYTC will not be using this field.   |

The Producer/Supplier Plants Folder Tab Field Table  
**Table A-9**

The following Plant Types should be tracked:

- AGGREGATE
- ASPHALT BINDER  
 TERMINAL
- ASPHALT EMULSION  
 TERMINAL
- CONCRETE CENTRAL MIX
- CONCRETE PIPE
- CONCRETE TRUCK MIX
- CORRUGATED METAL PIPE
- HDPE PIPE
- HMA BATCH
- HMA CONTINUOUS
- HMA DRUM
- HMA MODIFIED BATCH
- PRE-CAST
- PRE-STRESSED
- PVC PIPE
- RECYCLED PLANT
- REDISTRIBUTION YARDS



## Exercise A-4

In the following exercise, you will add a new plant to an existing producer/supplier.

User ID: **cgayle** Password: **kentucky** Group ID: **COMATL**

1. In the **Plant ID** field, enter **AGP000101**.
2. In the **Plant Type** drop-down list, click the expand arrow to the right of the current selection and click **AGGREGATE**.
3. In the Plant Name field, enter **KENTUCKY STONE@FRANKFORT**.
4. In the Last Inspected Date, enter **03/31/06**.
5. In the **Plant Status** drop-down list, click the expand arrow to the right of the current selection and click **Active**.
6. In the **Geographic Area** drop-down list, click the expand arrow to the right of the current selection and click **District 07**.
7. Click the **Save** button.
8. Click the **Close** button.

## Modifying Producer/Supplier Materials

The Producer/Supplier Materials window is used to modify materials associated to a specified producer/supplier. An associated material can also have Remarks attached to it.

The Producer/Supplier Materials Window  
**Figure A-4**



Policy and Procedure

In KYTC, the Description folder tab on the Producer/Supplier window should be populated in accordance with the field table definitions below.

Material Code Approval Status should be used as defined below:

| Status           | Description  |
|------------------|--|
| Qualified        | This P/S is qualified to supply this material.     |
| Pending          | Material is under review.                          |
| Project Specific | Material is being evaluated on a specific project. |
| Not Qualified    | This P/S is not qualified to supply this material. |

The Producer/Supplier Material Code Approval Status Table  
 Table A-10

As a material is retested for approval, an Expiration Date for the current Material Code should be entered, and a new Material Code record should be entered with the appropriate Approval Status Type, Sample ID, and Effective Date.

If a P/S should no longer supply a material, enter the date the material is no longer qualified in the Expiration Date field. **Do not modify the Approval Status field.**



*Note: In order for a Producer/Supplier Material to be visible in the List of Approved Materials Report, it must be **EFFECTIVE** and have a status of **Qualified or Pending**.*

| Field Name            | KYTC Population Policy & Procedure  |
|-----------------------|---|
| Producer/Supplier     | After selection, displays the unique identifier of the producer/supplier approved to provide materials.   |
| Material Code         | Select the Material Code  |
| Material Full Name    | Displays the material's full name.  |
| Material Category     | Displays the classification type of the material.   |
| Approval Status       | Select the Approval Status.<br>- See table above.   |
| Source Type           | KYTC will not be using this field.  |
| Effective Date        | Enter the effective date when the material became active for the Producer/Supplier. Defaults to current date when a new material is added and must be less than the Expiration Date (if entered). The Effective Date may be greater than the expiration date of the previous inactive row of the same material, if present. |
| Expiration Date       | Enter the expiration date.<br>- Original P/S Material approvals should expire one-year from the approval date.<br>- Re-approvals should be done on a yearly basis.  |
| Sample ID             | KYTC will optionally enter the Sample ID used to qualify or disqualify the material for the selected Producer/Supplier if it is available.  |
| Last Modified Date    | Auto populated with the date the record was last modified.  |
| Last Modified User ID | Auto populated with the User ID of the person who last modified the record.   |

The Producer/Supplier Materials Window Field Table  
**Table A-11**



Policy and Procedure

In KYTC, the Producer/Supplier Materials window is used to associate Material Codes to Producers, Suppliers, Manufacturers, and Plants. Each material section is responsible for maintaining the data for their section. If Material Code is not associated to a P/S, contact the appropriate section at the Central Office.



### Exercise Exercise A-5

In the following exercise, you will add a material to a producer/supplier material.

User ID: **cgayle** Password: **kentucky** Group ID: **COMATL**

1. On the **Approved Lists** panel, double-click the **Producer/Supplier Materials** icon.
2. On the toolbar, click **Open** icon.
3. **Select** Producer Supplier Code **AGP000111-RINKER MATERIALS@SPRINGFIELD**.
4. Click the **New** button on the toolbar.
5. Right click in the **Material Code** field.
6. **Select** Material Code **10100-AGG-BOTTOM ASH-COARSE**.
7. In the Approval Status drop-down list, **click** the expand arrow to the right of the current selection and click **QUALIFIED**.
8. In the **Expiration Date** field, enter **01/02/10**.
9. Click the **Save** button.
10. Click the **Close** button.

## Review for Appendix A Modifying Approved Lists

To enter an approved product:

1. On the **Approved Lists** panel, double-click the **Approved Materials** icon.
2. Click the desired material.
3. Click **OK**.
4. Click the top datawindow and click the **New** button.
5. In the **Product** field, type the name of the product.
6. Press the **Tab** key.
7. The **Effective Date** field defaults to the current date. Change the effective date of the product if necessary.
8. Press the **Tab** key.
9. In the **Expiration Date** field, type the expiration date of the product.
10. In the **Product Category Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
11. Press the **Tab** key.
12. Using the *right* mouse button, click the **P/S** field.
13. From the object menu, click **Search**.
14. In the **Search** window, click the desired Producer/Supplier.
15. Click **Ok**.
16. In the **Acceptance Method Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
17. Click the **Save** button.

To add a new qualification to an existing welder:

1. On the **Approved Lists** panel, double-click the **Welders** icon.
2. Click the **Open** button.
3. Click the desired welder record.
4. Click **OK**.
5. In the **Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
6. In the **Geographic Area** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
7. Click the middle datawindow to change the focus.
8. In the **Weld Process** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.

9. In the **Weld Position** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
10. Using the *right* mouse button, click the **Sample ID** field.
11. From the object menu, click the **Search** choice.
12. In the **Search** window, scroll to and click the desired sample.
13. Click **Ok**.
14. Press the **Tab** key.
15. In the **Last Test Date** field, type the date of the last test.
16. Press the **Tab** key.
17. In the **Expiration Date** field, type the expiration date of the qualification.
18. Press the **Tab** key.
19. In the **Electrode Group** field, type the electrode group.
20. Press the **Tab** key.
21. In the **Electrode Size** field, type the electrode size.
22. In the **Electrode Size Unit** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
23. Press the **Tab** key.
24. In the **Material Thickness** field, type the thickness of the material.
25. In the **Material Thickness Unit** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
26. Repeat steps 8-25 for additional qualifications.
27. Click the **Save** button.

To modify an existing producer/supplier:

1. On the **Approved Lists** panel, double-click the **Producer/Supplier** icon.
2. Click the **Open** button.
3. In the **Producer/Supplier** list, scroll to and click the desired producer/supplier.
4. Click **Ok**.
5. In the **Producer Supplier Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
6. Press the **Tab** key.
7. In the **Producer Supplier Name** field, type the vendor's name.
8. Press the **Tab** key.
9. In the **Vendor ID** field, type the vendor ID.
10. In the **Geographic Area** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
11. In the **Location** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
12. In the **Approval Level** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
13. Press the **Tab** key.
14. In the **Location Description** field, type the location description.
15. In the **DBE** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
16. Press the **Tab** key.
17. In the **Contact** field, type the contact person's name.
18. In the **Status** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
19. Click the **Save** button.

To modify an existing producer/supplier plant:

1. On the **Approved Lists** panel, double-click the **Producer Supplier** icon.
2. Click the **Open** button.
3. Select the desired producer supplier record.
4. Click **Ok**.
5. Click the **Plants** folder tab.
6. In the select list at the top, scroll to and click the desired producer/supplier plant.

7. Click the **Portable Plant** check box (ON), if applicable.
8. Press the **Tab** key.
9. In the **Last Inspected Date** field, type the date of the last inspection.
10. In the **Plant Status** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
11. In the **Location Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
12. In the **Geographic Area** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
13. Press the **Tab** key.
14. In the **Location Description** field, type the description location.
15. Click the **Save** button.

To modify an existing producer/supplier material:

1. On the **Approved Lists** panel, double-click the **Producer Supplier Material** icon.
2. Click the desired producer/supplier record.
3. Click **Ok**.
4. In the select list at the top, scroll to and click the desired producer/supplier material.
5. In the **Approved Status Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
6. In the **Source Type** drop-down list, click the expand arrow to the right of the current selection and click the desired choice.
7. Press the **Tab** key.
8. In the **Effective Date** field, type the effective date of the material, if appropriate.
9. Press the **Tab** key.
10. In the **Expiration Date** field, type the expiration date of the material, if applicable.
11. Using the *right* mouse button, click the **Sample ID** field.
12. From the object menu, click the **Search** choice.
13. Click the desired sample ID record.
14. Click **OK**.
15. Click the **Save** button.







Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## **Appendix B Change Orders**

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By the end of this learning module, you will be able to do the following:

Understand the Rules for the Life Cycle of Change Orders

Create a Change Order

## Change Orders

There are five phases in the Change Order (CO) life cycle. They are as follows:

1. Creation of Change Orders
2. Maintaining Change Orders
3. Review and Approval of Change Orders
4. Tracking Change Orders
5. Change Order Reports

### Creation of Change Orders

There are two steps in the creation of a CO. The first step is the initial preparation made by the Resident Engineer (Project Manager). The second step is to build the CO in SiteManager. The following procedure traces the path of a CO from the initial preparation through the creation of the CO in SiteManager.

### Initial Preparation

The Resident Engineer creates the CO when the necessity for contract modifications arises. However, the Resident Engineer must first ensure that funding is available before considering modifying any contract by CO. Once the Resident Engineer verifies that funding is available for a CO through the Fund Manager, a CO may be created.

When a funding modification is needed the Resident Engineer should prepare a cost estimate, or have the contractor submit a cost estimate. This cost estimate will be utilized to present the cost to the Fund Manager as an inquiry to see if the funds are available for the proposed contract funding modification. Program Management, Maintenance or Rural and Municipal Aid must give verbal approval depending on the contract type. Each Resident Engineer will be notified as to whom the Fund Manager is. In addition to the Fund Manager's approval, if the project is funded through Program Management a spreadsheet or document showing how the funds will be paid out should be forwarded to the KYTC's Cash Flow Manager for approving cash flow management of these funds. The Cash Flow Manager will then verify that the funding is adequate for the expected pay out time period. The Fund Manager should not give verbal approval until both cash flow management and available funds are verified. In the event that a new project or category has to be created for an item, it must be done before the CO is created.

### Change Orders in SiteManager

Once funding has been verified, the Resident Engineer (creator) may begin creating the CO in SiteManager. After logging into SiteManager the creator must navigate to the Header Window to create a new CO. The CO Header Window allows an authorized user to create a new CO by entering new descriptive information for a CO. Specific information about the CO must be recorded using the CO Header Window, the CO Items Window, the Time Extension Window and the CO Explanations Window. Details for individual fields required in these windows can be found in the Policies & Procedures document for the window.

## Maintaining Change Orders

The creator of the CO will be the person maintaining the CO throughout its life. In most cases this will be the Resident Engineer or their office manager, but may also be Central Office Construction Personnel or other users designated by the Director of Construction.

When a CO is created, it is in draft status. The creator is responsible for forwarding the CO to the appropriate users for review and tracking its progress.

Once a CO has been created, updates to the CO information may be required. CO Header information, Items, Timeframes and Explanations may be modified in update mode on the appropriate windows. This updated information might come from comments made during the review or approval process, or the creator may have revisions or additional information that was left off the previous draft.



*Note: The creator will also be responsible for running the external/internal CO reports, as well as attaching comments received from non-SiteManager users. When the review process is completed the creator will change the status to pending and forward the CO for approval. The CO can no longer be modified when the status is Pending. Once the approval/denial process is complete the CO status is changed manually by the creator.*

## Change Order Review and Approval Process

After it is created, a Draft CO can be forwarded via in-box notification for parallel review. Parallel review is concurrent review by more than one reviewer at a time. The creator of the CO can also place the change order into Pending status and submit it for hierarchical approval. The KYTC policy will be to always have a CO reviewed before submitting it for approval unless authorized by the director of construction or higher.

Users involved in reviewing a draft CO or approving a pending CO can record their decisions about proposed changes to the contract on-line using the Review/Approve Window. Reviewer/Approvers receive an in-box message from the creator requesting an action, to review or approve the CO. The in-box message specifies the contract and CO number. Additional information about the review and approve process can be found in the Policy and Procedures for the Review/Approve Window.

During the Review process, the DME will need to be added to the Change Order Review group to be aware of the item quantity changes and new items of work.

All Change Orders on a contract must be either Approved or Disapproved in order for the Physical Work Completion Date to be entered in Contract Administration, as part of the contract completion process.

After the Change Order has been approved, the Change Order Final Approver will notify the DME and RE that the change order has been approved at the final level.

## Tracking the Change Order

The creator of the CO and those who are involved in the CO review/approve process or any other SiteManager user affiliated with the contract or CO will have access to the tracking information. Anyone with access rights to the Header Window may open the Tracking Window to view information about the status of a CO. This window allows the user to view the contract information documented in CO Header Window along with the CO Tracking List which displays details about the actions taken by those reviewing or approving the CO

## Change Order Reports

KYTC has identified the need for three custom change order reports to be generated. Two reports are for internal purposes and the other for external purposes.

KYTC Change Order Report - This report shows important data related to a specific change order that can be viewed by the Resident Engineer (RE), RE Office Personnel, District Office Personnel, and Central Office Personnel. A person in the Resident Engineers Office will be required to send this document to parties who do not have access to SiteManager for review.

Change Order Reason Report - This report shows information that summarizes the Reason Codes and Explanations for change orders as it relates to the amount of funds encumbered and number of change orders written. The purpose is to allow District Office and Central Office Personnel to view trends as to recurring problems for which change orders are written.

Contractor Change Order Report - This report shall be generated to serve the purpose of a legal modification of the contract. This document will be sent to the contractor for review and signatures. The report will contain contract and project data detailing the directed changes.

## What does this mean to the DME?

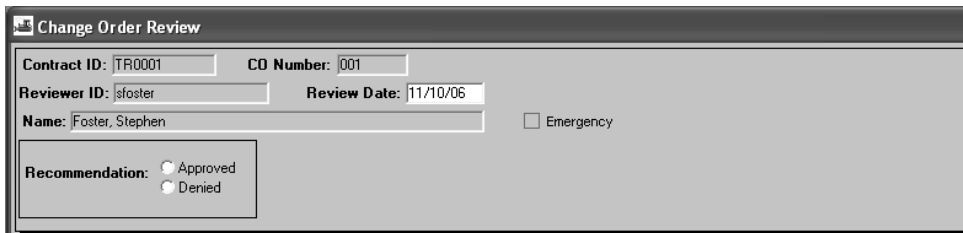
The DME will be added to the Change Order Review process. This will ensure he is aware of the item quantity changes and new items of work.

After the Change Order has been approved, the Change Order Final Approver will notify the DME and RE the change order has been approved at the final level.

## Reviewing and Approving Change Orders

The Change Order Review/Approve icon allows the user who receives an In-Box message to review a draft change order or to approve a pending change order. The Review/Approve window allows the user to:

1. Access the change order information,
2. View the contract and change order information online,
3. Document their recommendation to approve or deny the Draft or Pending Change Order, or
4. Record Remarks related to their recommendation. Remarks are optional.



The screenshot shows a window titled "Change Order Review". It contains several input fields and a recommendation section. The fields are: "Contract ID" with the value "TR0001", "CO Number" with the value "001", "Reviewer ID" with the value "sfoster", and "Review Date" with the value "11/10/06". Below these is a "Name" field with the value "Foster, Stephen" and an unchecked "Emergency" checkbox. At the bottom, there is a "Recommendation" section with two radio buttons: "Approved" (which is selected) and "Denied".

The Change Order Approval Window

**Figure B-1**



## Exercise B-1

In the following exercise, you will approve Change Order 001 on contract TR0001.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Change Orders** panel, double-click the **Change Order Maintenance** icon.
2. On the **Change Order Maintenance** panel, double-click the **Change Order Review/Approve** icon.
3. In the **Contract ID** list box, scroll to and double-click Contract **TR0001**.
4. In the **Change Orders** list box, scroll to and click Change Order **001-Contract Modification – Utility Relocation**.
5. Click the **OK** button.
6. Click the **Services** menu.
7. Click the **Change Order** choice.
8. Click the **Services** menu.
9. Click the **CO Items** choice.
10. Double-click item number **8000**.
11. Click the **Close** button.
12. Click the **Close** button.
13. On the **Change Order Approval** window click the **Approved** radio button.
14. Click the **Remarks** button.
15. In the **Remarks** text box, type **Please keep me up to date on the situation and progress**.
16. Click the **Remarks** button.
17. Click the **Save** button.
18. In the message prompting you to confirm the recommendation, click the **Yes** button.
19. Click the **OK** button.
20. Click the **Close** button.

## Tracking Change Orders

The status of a change order in the review or approval cycle can be monitored by opening the Tracking window at any time. The Tracking window for a change order is a view-only window and displays the following information:

1. The date a request for recommendation was sent to a reviewer or approver,
2. The reviewer or approver's name,
3. The action requested - review or approve,
4. The date the reviewer or approver made a recommendation,
5. The recommendation - Approved or Denied, and
6. Any Remarks the reviewer or approver has made.

The screenshot shows a software window titled "Tracking" with two tabs: "CO Header" (selected) and "CO Tracking List". The "CO Header" tab contains the following fields and values:

- Contract ID: TR0001
- CO Number: 001
- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- CO Created by: Wilson, John
- On: 07/14/06
- Status: Draft
- Approval Level: (empty)
- Description: Utility Relocation
- Reason Code: Utility Issues
- CO Type: CONTRACT MODIFICATION
- Override Approval Rules:
- Emergency Work:
- Functions:  Overrun/Underrun,  Force Account,  Extra Work,  Zero Dollar,  Time Adjustment,  Final Quantity
- Bid Contract Amt: \$830,420.25
- Current Contract Amt: \$830,420.25
- CO Amount: \$0.00
- Reference to: Dispute: (empty), Force Account: (empty)

The Change Order Tracking Window  
Figure B-2



## Exercise B-2

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Change Order Maintenance** panel, double-click the **Tracking** icon.



*Question? Why did the Tracking Window automatically open with Contract ID TR0001 and CO Number 001? Because we opened this Change Order in the previous exercise and SiteManger remembered*

2. Click the **CO Tracking List** folder tab.



*Hint: This window will show you the status and history of the Change Order.*

3. Click the **Close** button.



## Review for Appendix B Change Orders

To review or approve a Change Order:

1. On the **Main** panel, double-click the **Change Order** icon.
2. On the **Change Order** panel, double-click the **Change Order Maintenance** icon.
3. On the **Change Order Maintenance** panel, double-click the **Change Order Review /Approve** icon.
4. Open a Draft Change Order that has been forwarded for review or a Pending Change Order that has been sent for approval.
5. Click the **Approved** or **Denied** radio button.
6. Click the **Save** button.

The Tracking window for a change order is view-only window and displays:

- The date a request for recommendation was sent to a reviewer or approver

- The reviewer or approver's name
- The action requested - review or approve
- The date the reviewer or approver makes a recommendation
- The recommendation - Approved or Denied
- Any Remarks the reviewer or approver has made

To track the status of a change order:

1. On the **Main** panel, double-click the **Change Order** icon.
2. On the **Change Order** panel, double-click the **Change Order Maintenance** icon.
3. On the **Change Order Maintenance** panel, double-click the **Tracking** icon.
4. Open a change order.
5. When complete, click the **Close** button.





Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## **Appendix C Viewing Estimate Discrepancies**

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By the end of this learning module, you will be able to do the following:

View Estimate Discrepancies

## Viewing Estimate Discrepancies

The Estimate Discrepancy panel displays all discrepancies associated with an estimate. SiteManager identifies the discrepancies associated with an estimate during the estimate generation process. The discrepancies are of two levels; discrepancies at estimate level and discrepancies at item level. For instance, if a checklist event date is not met, the discrepancies are associated to the estimate. If an item overrun is displayed, the discrepancy is associated with the specific line item. Estimate discrepancies will be listed at the top of the Estimate Discrepancy panel, and the item discrepancies will be listed after them. The Status field values will be either 'Unresolved' or 'Override'. When the Recalculate Discrepancies function is requested from the Services menu, or if the estimate is regenerated, the discrepancies are re-determined.



*Note: Discrepancy options include:  
Override with comment  
Resolve and Recalculate*

### Types of Discrepancies

There are five types of discrepancies and each will be identified using different criteria. These five discrepancies are as follows:

- **Overrun Discrepancy** – Occurs when the Installed Quantity of a Major Item exceeds the Current Quantity by more than 25 % or when the Installed Quantity of a Minor Item exceeds the Current Quantity by more than 999.99 %.
- **Milestone Completion Discrepancy** – Occurs if a milestone has not been completed within the time frame specified on the milestones window.
- **Contract Completion Discrepancy** – Occurs if work is recorded on a DWR beyond the Contract Completion Date specified on the Contracts window, Critical Dates folder tab.
- **Checklist Event Discrepancy** – Occurs if the Actual Date of the Checklist Event has not been entered on the Checklist Event Dates window within the timeframe specified on the Checklist Scheduled Events window.
- **DBE Compliance Discrepancy** – Occurs if the total work completed by the subcontractor is less than the original commitment amount or if the sum of the DBE Subcontract Verified Payment is less than the DBE goal amount for the contract.



Policy and Procedure

Discrepancies on a Progress Estimate may be overridden or resolved. If it isn't resolved, then it will appear on the next estimate.

Only the person who generated the Progress Estimate can override discrepancies. They will research the discrepancies and will either resolve them, or go to the Status drop down box and choose to Override. If a discrepancy cannot be resolved and the Override option is utilized, then a note will be entered indicating the reason for overriding the discrepancy in the remarks bubble.

The following course of action should be taken if the estimate discrepancy appears:

**Overrun:** The Resident or his Office Manager should check the overrun quantity to see if it's correct. At this point, the discrepancy can be overridden until a change order can be prepared.

**Contract Completion Date Missed:** The Resident or his Office Manager should verify the discrepancy, and then initiate a change order to correct it. At this point, the discrepancy can be overridden until the change order is approved.

**Milestone Completion Date Missed:** The Resident or his Office Manager should verify the discrepancy, and then initiate a change order to correct it. At this point, the discrepancy can be overridden until the change order is approved.

**Checklist Event Completion Date Missed:** The Resident or his Office Manager should verify the discrepancy. If the discrepancy is for Erosion Control then the Resident Office Manager should verify why the Erosion Control Inspection was missed and correct the discrepancy. If the discrepancy is for Contractor Evaluations, the Resident Office Manager should notify the appropriate person to conduct the Contractor Evaluation and Override the discrepancy. If the discrepancy is for FHWA 47 or Materials Check Done, the discrepancy may be overridden if it is a Progress Estimate. If it is a Final Estimate then the appropriate personnel should be notified of the discrepancy, and discrepancy must be resolved prior to approving the estimate.

**Insufficient Samples:** For Insufficient Samples, the discrepancies need to be resolved in a timely manner. If left unresolved during a progress estimate, a remark is not required however *should* be noted.

| Field Name   | Description  | KYTC Population Policy & Procedure   |
|--------------|--|--|
| Contract ID  |  | The Kentucky Transportation Cabinet-defined ID for the contract.   |
| Estimate Nbr | Estimate number associated with the estimate summary.  | Auto populated with the estimate number.   |
| Status       | Status of the estimate including:<br>APRV - Payment Approval Given<br>INAP - Initial Approval(s) Given<br>INVD - Invalid<br>MINM - Payment Approval Given,<br>Payment Not Made Minimum<br>PEND - Pending Approval<br>RJCT – Rejected | Auto populated with the estimate status.   |
| Description  | Description of the discrepancy.  | Auto populated with the description of the discrepancy.  |
| Status       | Status of the discrepancy:<br>Valid Values - Override,<br>Unresolved   | The person who generates the estimate will follow the procedure as documented in the Policy and Procedure section above. |
| By           | User ID of the person overriding the discrepancy.  | Auto populated with the User ID of the person overriding the discrepancy.  |
| Resolve Date | Date the discrepancy was overridden.   | Auto populated with the date the discrepancy was overridden.   |
| Resolve Time | Time the discrepancy was overridden.   | Auto populated with the time the discrepancy was overridden.   |

Table C-1 The Estimate Discrepancies Fields Table  
Table C-1



## Exercise C-1

In the following exercise, you will review a discrepancy.

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. Go to the Main Panel->Contractor Payments->Estimate panel
2. Double-click the **Estimate Discrepancy** icon.
3. Double-click **Contract ID 042155**.
4. Highlight **Estimate Number 0001** and click the OK button.
5. On the toolbar, click the **Remarks** button.
6. To close the Remarks popup window, click the **Remarks** button again.
7. Click the **Close** button.



*Note: The insufficient samples discrepancies that are not resolved will only be in effect for these types of discrepancies until the final estimate.*

*Normally all discrepancies have to be overridden with a remark.*

- The discrepancy reasons should be documented as normal business practices for the end of the job 'Material Certification Letter'. At this time the Contract's Insufficient Samples indicator would be turned off prior to generating the final estimate.

## Review for Appendix C

To open an Estimate discrepancy:

1. On the **Estimate** panel, double-click the **Estimate Discrepancy** icon.
2. In the **Contract** list box, scroll to and double-click the desired contract.
3. In the **Estimate** list box, scroll to and click the desired estimate.
4. Click **OK**.









Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

# Appendix D Key Dates and Checklist Event Dates

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By the end of this learning module, you will be able to do the following:

Enter a Key Date

View a Checklist Event Schedule

Record Checklist Event Dates

## Key Dates

SiteManager adds a set of default Key Dates automatically to each new Contract. The user creates the Key Date schedule and records the actual occurrence of Key Dates on this panel. The user can add, modify, and delete the Key Dates.

**Key Dates**  
 Contract ID: 030056

| Key Date Type                            | Projected Date | Actual Date | Required to Activate | Required to Finalize |
|--|----------------|-------------|----------------------|----------------------|
| Strip/Reflect Final Insp Report Received | 00/00/00       | 00/00/00    | N                    | N                    |
| Struct Final Insp Punchlist Complete     | 00/00/00       | 00/00/00    | N                    | N                    |
| Structures Final Inspection              | 09/01/05       | 09/01/05    | N                    | N                    |
| Struct Final Insp Report Received        | 00/00/00       | 00/00/00    | N                    | N                    |
| Work Begin Date                          | 04/24/03       | 04/24/03    | N                    | N                    |
| Work Complete Date                       | 07/30/05       | 07/30/05    | N                    | Y                    |
| Work Order Issue Date                    | 03/18/03       | 03/18/03    | Y                    | N                    |
| Date of Materials Certification Letter   | 07/30/05       | 00/00/00    | N                    | N                    |

**Key Date Type:** Date of Materials Certification Letter

**Projected Date:** 07/30/05

**Actual Date:** 00/00/00

**Distribution List:** 09

**Message Text:** MATERIAL CERTIFICATION IS COMPLETE

Required to Activate

Required to Finalize

**Recipient:**

The Key Dates Window  
 Figure D-1

| Field Name           | Description  | KYTC Field Population Policy and Procedure   |
|----------------------|--|--|
| Contract ID          | The transportation agency-defined ID for the Contract.   | This field is auto populated with the Contract ID.   |
| Key Date Type        | The Key Date Types are the names given by the transportation agency to the Key Dates (e.g., Closed to Traffic Date, State Final Inspection Date, Open to Traffic Date). The Key Date type is a required field and must be unique. This field is protected unless the user selects the New menu option. | Select Key Date Type.  |
| Required to Activate | Indicates that a Key Date must occur before the Contract status can be changed from Pending to Active (e.g., Letting Date, Award Date, Execution Date). A Key Date can not be both Required to Activate and Required to Finalize.  | Do not modify this field. This is set to the default by System Administration. This field is non editable after activation.                        |
| Required to Finalize | Indicates that a Key Date is part of the Contract finalization process. A Key Date can not be both Required to Activate and Required to finalize.  | Do not modify this field. This is set to the default by System Administration.   |
| Distribution List    | Group to be notified when the actual date of the Key Date event is entered. The user can search this field. After valid entry of a Distribution List, the Recipient User ID field is protected.  | Search for applicable Distribution List.   |
| Recipient User ID    | Person to be notified when the actual date of the Key Date event is entered. The user can search this field. After valid entry of a Recipient, the Distribution List field is protected.   | Search for applicable Recipient ID.  |
| Message Text         | Standard message to be sent to the recipient(s).   | Enter the message text as indicated in the KYTC Key Dates table section of this procedure. Most dates have default message text entries populated. |

**The KYTC Field Population Policies and Procedures  
 Table D-1**

## KYTC Key Dates

The following sections include details about each of the Key Dates for KYTC. All dates are default dates with the exception of “Other Inspection” dates. These dates should be manually added to the Key Date window by the District if the “Other Inspections” should be needed on the contract. Before activation District Office should review contract and remove the types of inspections not needed. For example if a resurfacing project, Structure Inspection, Landscaping, and Electrical are typically not required. They can be added later if needed.

### Corrective Work Completed Date

| Field Name             | Details   |
|------------------------|---|
| Project Type (F/S)     | Federal and State   |
| Default Key Date (Y/N) | Yes   |
| Person entering date   | Resident Engineer / Office Manager                              |
| Required to Activate   | No  |
| Required to Finalize   | Yes   |
| Distribution List      | District responsible for Contract and Central Office            |
| Recipient              | N/A   |
| Message Text           | All corrected work is completed to the Resident’s satisfaction. |

### Open to Traffic

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | No   |
| Required to Finalize   | No   |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Work Complete Date

| Field Name             | Details   |
|------------------------|---|
| Project Type (F/S)     | Federal and State   |
| Default Key Date (Y/N) | Yes   |
| Person entering date   | Resident Engineer / Office Manager                          |
| Required to Activate   | No  |
| Required to Finalize   | Yes   |
| Distribution List      | District responsible for Contract and Central Office        |
| Recipient              | N/A   |
| Message Text           | Time charges stopped on Contract. Final inspections needed. |

Work Begin Date

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | Work Began on Project                                |

Comprehensive Corrective Work Notification

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                      |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                     |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | Contractor has been sent all final inspection reports. |

Resident Final Check

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | Final Check completed by Resident Engineer Office    |

Files Received in District Office

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                      |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | District   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | Residency responsible for Contract and Central Office. |
| Recipient              | N/A  |
| Message Text           | Files received in District Office for Final Check      |

District Final Check

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                      |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | District   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | Residency responsible for Contract and Central Office. |
| Recipient              | N/A  |
| Message Text           | Files received in District Office for Final Check      |



Files Received in Central Office

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Central Office                                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District and Residency responsible for contract. |
| Recipient              | N/A  |
| Message Text           | Contract Received in CO for Final Check          |

Central Office Final Check

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Central Office                                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District and Residency responsible for contract. |
| Recipient              | N/A  |
| Message Text           | Final Check Completed by Central Office          |

Structures Final Inspection Date

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

**Structures Final Inspection Report Received**

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

**Structures Final Inspection Punch List Complete**

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

**Electrical Final Inspection**

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Electrical Final Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Electrical Final Inspection Punch List Complete

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

FWHA Final Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Roadway Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Roadway Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Roadway Inspection Punch List Complete

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Signing Final Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Signing Final Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Signing Final Inspection Punch List Complete

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Painting Final Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Painting Final Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Painting Final Inspection Punch List Complete

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Striping / Reflectivity Final Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Striping / Reflectivity Final Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Striping / Reflectivity Final Inspection Punch List

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Landscaping Final Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Landscaping Final Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Landscaping Final Inspection Punch List Complete

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |



Resurfacing Final Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | By whom inspection conducted and if corrective work required. ID By Joe Smith NO Corrective Work require or by Joe Smith Additional \ Corrective Work Required |

Resurfacing Final Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Resurfacing Final Inspection Punch List Complete

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | Yes  |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Other Final Inspection

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State  |
| Default Key Date (Y/N) | No   |
| Person entering date   | Person who conducts the Inspection.  |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office   |
| Recipient              | N/A  |
| Message Text           | Other Type, By whom inspection conducted and if corrective work required. ID Widget Inspection By Joe Smith NO Corrective Work require or Widget Inspection by Joe Smith Additional \ Corrective Work Required |

Other Final Inspection Report Received

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | No   |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Other Final Inspection Punch List Complete

| Field Name             | Details  |
|------------------------|--|
| Project Type (F/S)     | Federal and State                                    |
| Default Key Date (Y/N) | No   |
| Person entering date   | Resident Engineer / Office Manager                   |
| Required to Activate   | N/A  |
| Required to Finalize   | N/A  |
| Distribution List      | District responsible for Contract and Central Office |
| Recipient              | N/A  |
| Message Text           | N/A  |

Ready for Materials Check - RE

| Field Name             | Details   |
|------------------------|---|
| Project Type (F/S)     | Federal and State   |
| Default Key Date (Y/N) | Yes   |
| Person entering date   | Resident Engineer / Office Manager  |
| Required to Activate   | N/A   |
| Required to Finalize   | N/A   |
| Distribution List      | District Materials, Central Office Materials, District Office responsible for the contract, and Final Estimates |
| Recipient              | N/A   |
| Message Text           | Materials Checked by Resident Office Staff  |

Ready for Materials Check- DME

| Field Name             | Details   |
|------------------------|---|
| Project Type (F/S)     | Federal and State   |
| Default Key Date (Y/N) | Yes   |
| Person entering date   | DME   |
| Required to Activate   | N/A   |
| Required to Finalize   | N/A   |
| Distribution List      | District Materials, Central Office Materials, District Office responsible for the contract, and Final Estimates |
| Recipient              | N/A   |
| Message Text           | DME completed Materials Certification Check   |

FHWA Date of Formal Acceptance

| Field Name             | Details        |
|------------------------|----------------|
| Project Type (F/S)     | Federal        |
| Default Key Date (Y/N) | Yes            |
| Person entering date   | Central Office |
| Required to Activate   | N/A            |
| Required to Finalize   | Finalize       |
| Distribution List      | N/A            |
| Recipient              | N/A            |
| Message Text           | N/A            |

Work Order Issue Date

| Field Name             | Details                           |
|------------------------|-----------------------------------|
| Project Type (F/S)     | Federal and State                 |
| Default Key Date (Y/N) | Yes                               |
| Person entering date   | Contract Procurement              |
| Required to Activate   | Activate                          |
| Required to Finalize   | N/A                               |
| Distribution List      | District Responsible for Contract |
| Recipient              | N/A                               |
| Message Text           | N/A                               |

Date Of Material Certification Letter

| Field Name             | Details   |
|------------------------|---|
| Project Type (F/S)     | Federal and State   |
| Default Key Date (Y/N) | Yes   |
| Person entering date   | Project Certification Technician  |
| Required to Activate   | N/A   |
| Required to Finalize   | Finalize  |
| Distribution List      | FHWA when applicable, Central Office Construction, DME (of that district), Resident (of that field office only) |
| Recipient              | N/A   |
| Message Text           | Materials Certification Complete by Central Office  |



### Exercise D-1

In the following exercise, you will schedule key dates.

User ID: **cgayle** Password: **kentucky** Group ID: **COMATL**

1. On the **Main Panel**, double click the **Contract Administration** icon.
2. Double click the **Contract Records** icon.
3. Double click the **Key Dates** icon.
4. Click the **Open** icon.
5. Double-click **Contract ID 030056**.
6. In the Key Date Type column, select the **Ready for Materials Check Resident**.
7. In the **Projected Date** field, type **07/30/05**.
8. In the **Distribution List** field, search for **09MAT**
9. Now, let's schedule another key date.  
In the **Key Date Type** column, select Ready for **Materials Check DME**.
10. In the **Projected Date** field, type **07/30/05**.
11. In the **Distribution List** field, search for **09MAT**.
12. On the toolbar, click the **Save** button.
13. Click the **Close** button.

## Viewing a Checklist Events Schedule

The Checklist Scheduled Events panel lists the scheduled events for the selected Contract. The data for the event selected in the top datawindow is displayed in the bottom datawindow. The Event Types are pre-defined in the system code tables. SiteManager adds a set of default Checklist Events automatically to each new Contract. The User creates the Checklist Event schedule on this panel.

The User can add, modify, and delete the Checklist Events.

When an event is scheduled on this panel, a subsequent batch process creates a record for each projected date. After the batch process runs, the User can record the Actual Date of each occurrence of an event on either the Checklist Event Dates panel or the Document Submission panel, depending on the event. If the Checklist Event is a document supplied by an external source, the Actual Date is recorded on the Document Submission panel. The batch process and/or an Estimate discrepancy may notify the recipient(s) when a Checklist Event is overdue.

**Checklist Scheduled Events**  
 Contract ID: 030056

| Event Type               | Frequency Type | Event Group Type    | Next Proj Date | Nbr of Occrc | Required to Activate | Discr Ind | Required Doc Type | Ext Ind |
|--------------------------|----------------|---------------------|----------------|--------------|----------------------|-----------|-------------------|---------|
| Contractor's Evaluations | Annually       | Contractor's Evalua | 07/30/05       | 1            | N                    | Y         | GENERAL CORP      | N       |
| Erosion Control          | Weekly         | Erosion Control     | 00/00/00       |              | N                    | Y         |                   | N       |
| Materials Check Done     | One Time Only  | Materials           | 07/30/05       | 1            | N                    | Y         | GENERAL CORP      | N       |

**Event Type:** Materials Check Done  
**Event Group Type:** Materials  
**Frequency Type:** One Time Only  
**Event Day:**  **Milestone No:**   
**Next Proj Date:** 07/30/05  
 Required to Activate  
 Discrepancy  
**Nbr of Occurrences:** 1  
 External Indicator  
**Required Doc Type:** GENERAL CORRESPONDENC  
**Distribution List:** 07312  
**Recipient:**   
**Message Text:**

The Checklist Scheduled Events Window  
 Figure D-2



Policy and Procedure

The Kentucky Transportation Cabinet will use this window to create the checklist event schedule. All default checklist events will appear for the Contract when the Contract is loaded into SiteManager. As part of the Contract Activation process, the District personnel will perform the following functions:

Delete Checklist Event Dates that do not apply for the Contract.

Enter the Next Projected Date. If nothing is entered, SiteManager will enter then next logical date after the Notice to Proceed Date. A Next Projected Date should be entered for all One Time Only or Annual events.

Enter the Number of Occurrences as 999 or the number of times the event should occur during the Contract. (Ex. If a Contract lasts two years and the event frequency is Annually, then 2 should be entered in the Number of Occurrences field.)

Enter the appropriate distribution list.

| Check List Event                | Event Group Type       | Freq.  | Recipient                        | Who Enters Date                   | Comment  |
|---------------------------------|------------------------|--|----------------------------------|-----------------------------------|--|
| Erosion Control Inspection      | Erosion Control        | Weekly. Set up Monday to Monday. Event Day 2 | Central Office Erosion Inspector | Inspector                         | This is done once a week for life of project.  |
| Contractor Evaluations Complete | Contractor Evaluations | Annually                                     | Pre - qualification Officer      | Resident Engineer/ Office Manager | This date should be entered once a year or before formal acceptance, which ever is first. Around December 31 |
| FHWA 47                         | FHWA 47.               | One time only at end of project              | N/A                              | Resident Engineer/ Office Manager | This is required to end all federal jobs   |
| Materials Check Done            | Materials              | One time only at end of project              | N/A                              | Central Office Materials          | Enter this date when Material Check is complete  |

**The Kentucky Transportation Cabinet Default Checklist Events  
 Table D-2**



## Exercise D-2

In the following exercise, you will view a Checklist Scheduled Event.

User ID: **cgayle** Password: **kentucky** Group ID: **COMATL**

1. Double-click the **Contract Records** icon..
2. Double-click the **Checklist Scheduled Events** icon.
3. Now, let's view the **Materials Check Done** event type.
4. In the **Event Type** column, select **Materials Check Done**.
5. What is the Frequency Type? One Time Only
6. Click the **Close** button.
7. Now, since the project is nearing completion, let's set the **Actual Date**.
8. Double-click the **Checklist Event Dates**. SiteManager displays the **Checklist Event Dates** window.
9. In the **Event Type** column, select **Materials Check Done**.
10. On the toolbar, click the **New** button.
11. In the **Actual Date** field, type **07/30/05**.
12. In the **Comments** field, type **EXCEPTION LETTER WAS SUBMITTED AND APPROVED**.
13. On the **toolbar**, click the **Save** button.
14. Click the **Close** button.









Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## **Appendix E Pipeline**

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By the end of this learning module, you will be able to do the following:

Download Data from the Server

Upload Data to the Server

View Pipeline Information

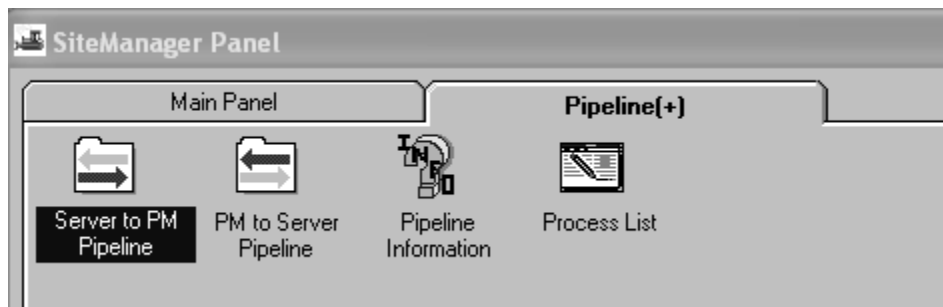
## Overview

Pipeline is the process that automates the transfer of data. SiteManager provides the Pipeline processes because Contract data must be downloaded and uploaded often during the life of a Contract. In general, the data downloaded from the Server is the Contract plan data, which is primarily the Contract specifications. The data uploaded to the Server is the Contract activity data, which is the work done on the Contract.

The pipeline process transfers data files from one database to another. In SiteManager, the pipeline process is used to download data directly from the Server's database to the standalone workstation's database, and to upload data directly from the standalone workstation's database to the Server's database.

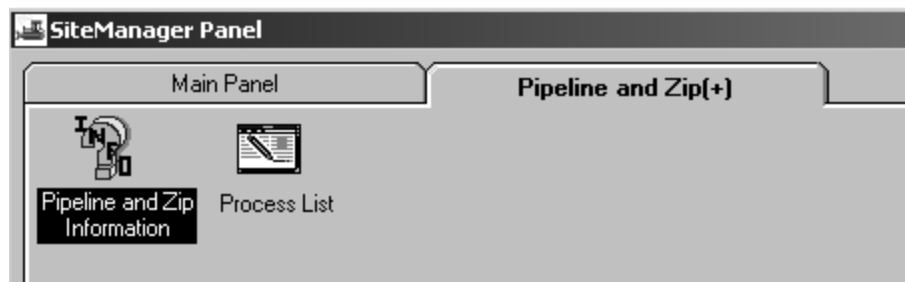
## Pipeline Panels

When logging on to SiteManager, the User connects to either the standalone database or the Server database, depending on which Pipeline function will be used.



The Pipeline Panel (Server connection)

Figure E-1



The Pipeline Panel (standalone connection)

Figure E-2

The following table shows how the Pipeline windows are used to transfer data.

| <b>Step</b> | <b>Activity</b>   | <b>Process</b>   | <b>Pipeline window</b>  |
|-------------|---|--|---|
| 1           | Download Basic Contract Data from the Server, and Download Materials Data from the Server | The User selects and downloads basic contract data and materials data from the Server's database to the standalone workstation's database using the Server to PM Pipeline panel. The Pipeline process loads the data directly into the User's standalone database. | Server to PM Pipeline window  |
| 2           | View Contract and Materials Data in standalone mode                                       | The User views contract and materials data in standalone mode.   |   |
| 3           | Create Samples in standalone mode   | The User creates Samples and records test data in standalone mode.   | As Samples are created, they are listed on the Sample Select folder tab in the PM to Server Pipeline window |
| 4           | Upload Samples to the Server  | The User selects and uploads Samples from the standalone workstation to the Server.  | PM to Server Pipeline window  |
| 5           | View Pipeline History   | The User can view a history of Pipeline activity.  | Pipeline Information window   |
| 6           | Download Basic Contract Data and Change Orders as needed                                  | New data is added to the Contract on the Server only. The User downloads new Contract data as it becomes available. The new data updates the standalone database.  | Download Basic Contract Data and Change Orders as needed  |
| 7           | Release the Contract  | When the Contract work is done, the User uses Pipeline to release the Contract back to the Server.   | PM to Server Pipeline window  |

The Pipeline Process Table  
**Table E-1**

## Downloading Data from the Server — PM

The Server to PM Pipeline panel lets the User download (check out) data from the Server’s database to the standalone workstation’s database. Materials data can be downloaded without selecting a Contract. To download Contract data from the Server, the User must first select a Contract and then select the data to download—Diaries, Daily Work Reports, Change Orders, and Force Accounts. To download Basic Contract Data or Materials data, the User must check the Basic Contract Data box on the Server to PM Pipeline panel. Basic Contract Data includes all Change Orders and Force Accounts, which includes Contract Materials. After the User has selected the data to download, the pipeline process is triggered by selecting the Pipeline Data menu option on the Services menu. For the data to download, the Contract must be in active status.



*FYI: The pipeline process loads the Contract and Materials data directly from the Server database to the standalone database. Contract work can not be recorded in the field until the Basic Contract Data is downloaded. The standalone workstations depend on periodic downloads from the Server for current data such as the results of estimates.*

### Server to PM Pipeline Summary

The Server to PM Pipeline Summary folder tab shows the number of Daily Work Reports, Diaries, Change Orders, Force Accounts, and Users selected. To see which ones are selected, the User clicks the appropriate folder tab.

The Server to PM Pipeline Summary Folder Tab

Figure E-3



*FYI: The Basic Contract Data checkbox includes all Change Orders and Force Accounts. The Materials checkbox option downloads material data in the material list but does not upload data. The Pipeline Status field displays the activity and complete status of the pipeline process.*



## Exercise E-1

In the following exercise, you will log on, select a Contract, and browse the PM to Server Pipeline folder tabs

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the SiteManager **Main Panel**, double-click the **Pipeline** icon.
2. On the **Pipeline** panel, double-click the **Server to PM Pipeline** icon. The **Pipeline Summary** folder tab is displayed.
3. Click the **Open** button.
4. In the **Contract ID** list box, scroll to and double-click **000274**.
5. Click the **DWR Select** folder tab.
6. Click the **Change Order Select** folder tab.
7. Click the **Force Account Select** folder tab.
8. Click the **Pipeline Summary** folder tab.



## Exercise E-2

In the following exercise, you will download data from the Server

User ID: **sfoster** Password: **kentucky** Group ID: **DME**

1. On the **Pipeline Summary** folder tab, click the **Basic Contract Data** check box (ON). You should currently have contract 000274 in the Contract ID field.
2. Click the **Services** menu and click the **Pipeline Data** choice. The progress of the download is shown in the Pipeline Status field. A message confirms that the data is downloaded.
3. Click the **Close** button.

## Uploading Data to the Server — PM

The PM to Server Pipeline panel lets the User upload (check in) data from the standalone database to the Server. When logging on to SiteManager, the User must connect to the Server database. The pipeline process transfers the selected data directly from the User's standalone database to the Server database.

To upload Sample data to the Server, the User selects the Samples to upload. Sample and Test data can be uploaded without selecting a Contract.

To release the Contract when the Contract work is completed, the User checks the Basic Contract Data box. After the User selects the data to upload, the pipeline process is triggered by selecting the Services menu Pipeline Data option.



*FYI: In conclusion, the pipeline process loads the data directly from the User's standalone database to the Server database.*

### PM to Server Pipeline Summary

The PM to Server Pipeline Summary folder tab shows the number of Daily Work Reports, Diaries, and Samples selected. To see which ones are selected, the User can view the appropriate folder tabs. When the User selects the Services menu Pipeline Data option, the selected data is extracted from the standalone workstation.

The PM to Server Pipeline Summary Folder Tab

**Figure E-4**

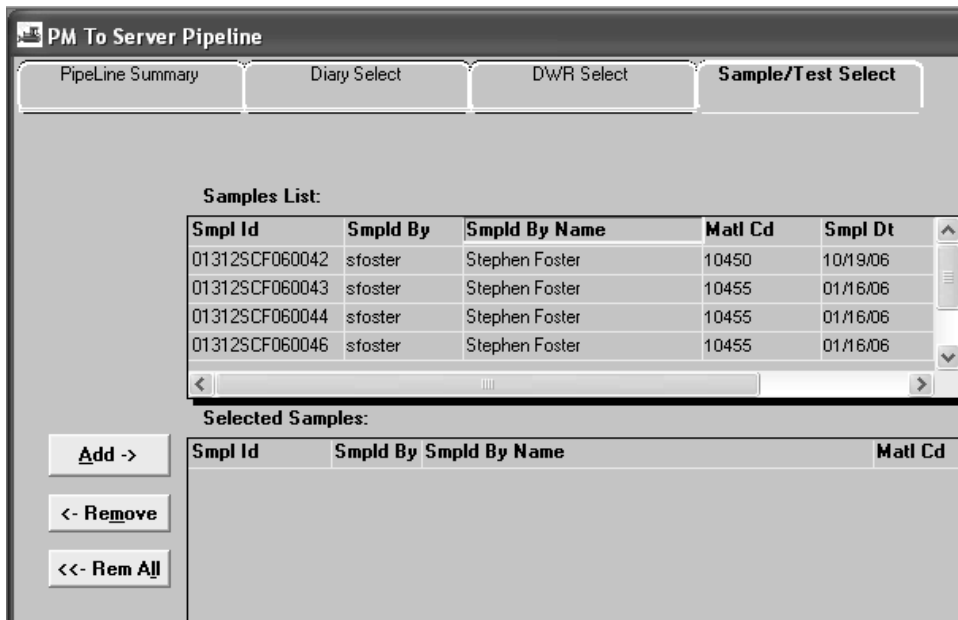


*FYI: The Basic Contract Data checkbox releases the contract when all work is done. The Check In status field displays the activity and complete status of the pipeline process..*



## Selecting Samples and Tests

When the User clicks the Sample/Test Select folder tab, the panel displays a list of Samples that have not been uploaded. The User selects the Samples to be uploaded. The Show all Samples menu option shows all of the Samples in the workstation including the previously uploaded Samples. This menu option can be used when the User has uploaded the Samples, but the file was lost before reaching the Server.



The PM to Server Pipeline Sample/Test Select Folder Tab  
**Figure E-5**



## Exercise E-3

In the following exercise, you will upload sample data to the Server.

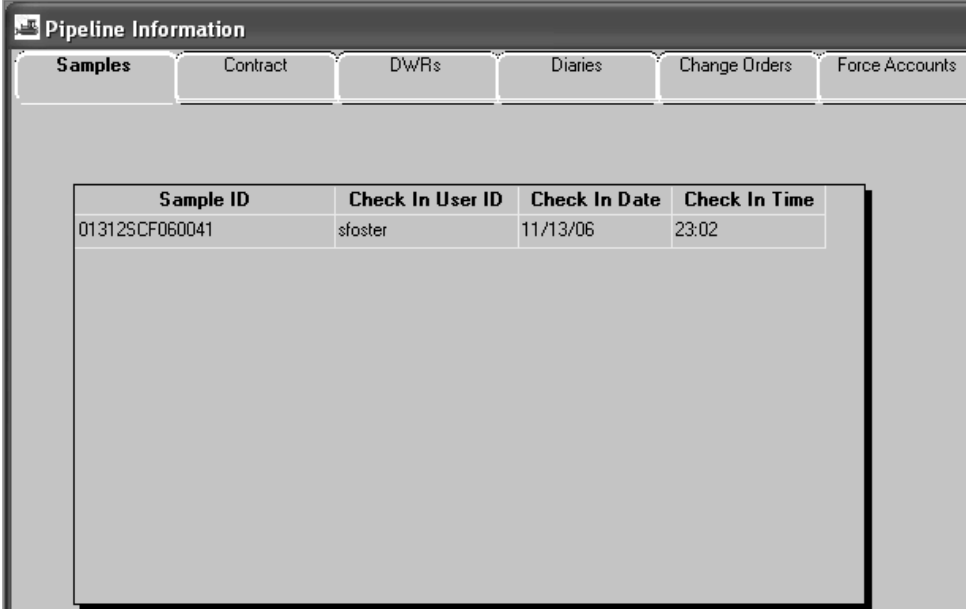
User ID: **cjones** Password: **kentucky** Group ID: **INSP**

1. On the **Pipeline** panel, double-click the **PM to Server Pipeline** icon. The Pipeline Summary folder tab is displayed.
2. Click the **Sample/Test Select** folder tab.
3. In the **Samples** list box, click sample ID **01312SCF060042**.
4. Click the **Add** button.  
The selected Samples are added to the **Selected Samples** list.
5. Click the **Pipeline Summary** folder tab.
6. Click the **Services** menu and click the **Pipeline Data** choice. PipeLine Data Ctrl+Shift+P A message confirms that the data is uploaded.
7. Click the **Close** button.

## Viewing Pipeline Information

The Pipeline Information panel lets the User view Pipeline information about Daily Work Reports (DWRs), Diaries, Contracts, Change Orders, Force Accounts, and Sample data. The Pipeline Information panel shows a history of Pipeline activity, such as when the data was downloaded and uploaded, and who downloaded or uploaded the data.

The Pipeline Information panel displays information that applies to the selected Contract, except for the Samples folder tab, which lists all Samples. When the User is connected to the Server, the panel shows information on data uploaded and downloaded to and from the Server. When the User is connected to the standalone database, the panel shows information on data uploaded and downloaded to and from the workstation.



| Sample ID      | Check In User ID | Check In Date | Check In Time |
|----------------|------------------|---------------|---------------|
| 013125CF060041 | sfoster          | 11/13/06      | 23:02         |

The Pipeline Information Panel

Figure E-6



### Exercise E-4

In the following exercise, you will view a history of Pipeline activity.

User ID: **cjones** Password: **kentucky** Group ID: **INSP**

1. On the **Pipeline** panel, double-click the **Pipeline Information** icon.
2. Click the **Contract** folder tab.
3. Select Contract **000274**.
4. Click the **Samples** folder tab.
5. Click the **Close** button.

---

## Materials Management Applicability

Materials data and Sample and Test data is transferred using Pipeline and Zip. This data may or may not be associated with a specific Contract. Materials data is transferred in one direction only—from the Server to the field. Materials data can be transferred from the Server to the User and from the User to the Inspector. It can not be uploaded to the Server. Sample and Test data is transferred in the opposite direction only—from the field to the Server. It can not be downloaded from the Server. To add Sample and Test data to SiteManager, the corresponding Materials data must be downloaded first.

The User uses Pipeline to:

- Download Contract and Contract Materials data from the Server



*FYI: If necessary, all materials data may also be downloaded from the server. This may take significant time.*

- Upload Sample and Test data to the Server
- Upload the Contract to the Server

## Review for Appendix E

To download data from the Server:

1. When logging on to SiteManager, connect to the Server database.
2. On the **SiteManager** main panel, double-click the **Pipeline** icon.
3. On the **Pipeline** panel, double-click the **Server to PM Pipeline** icon. The **Pipeline Summary** folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To download Basic Contract Data, click the Basic Contract Data check box (ON).
7. To select Change Orders, click the **Change Order Select** folder tab.
8. In the **Change Orders** list box, shift-click each Change Order to be downloaded.
9. Click the **Add** button. The selected Change Orders are added to the **Selected Change Orders** list.
10. To select Force Accounts, click the **Force Account Select** folder tab.
11. In the **Force Accounts** list box, shift-click each Force Account to be downloaded.
12. Click the **Add** button. The selected Force Accounts are added to the **Selected Force Accounts** list.
13. Click the **Pipeline Summary** folder tab. The panel displays the total number of Change Orders, Force Accounts, Diaries, Daily Work Reports, and Users selected.
14. To download the selected data from the Server, click the **Services** menu and click the **Pipeline Data** choice. The progress of the download is shown in the Pipeline Status field.

To upload data to the Server:

1. When logging on to SiteManager, connect to the Server database.
2. On the **SiteManager** main panel, double-click the **Pipeline** icon.
3. On the **Pipeline** panel, double-click the **PM to Server Pipeline** icon. The Pipeline Summary folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To release the Contract, click the Basic Contract Data check box (ON).
7. To select Samples, click the **Sample/Test Select** folder tab.
8. In the **Samples** list box, shift-click each Sample to be uploaded.
9. Click the **Add** button. The selected Samples are added to the **Selected Samples** list.
10. Click the **Pipeline Summary** folder tab. The panel displays the total number of Samples selected.
11. To upload the selected data to the Server, click the **Services** menu and click the **Pipeline Data** choice.

To view a history of Pipeline activity:

1. When logging on to SiteManager, to view information on data transferred to and from the Server, connect to the Server database. To view information on data transferred to and from the workstation, connect to the standalone database.
2. On the **SiteManager** main panel, double-click the **Pipeline** icon.
3. On the **Pipeline** panel, double-click the **Pipeline Information** icon. The Samples folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To view Pipeline information for the selected Contract, click the **Contract** folder tab.
7. To view Pipeline information on Force Accounts for the selected Contract, click the **Force Accounts** folder tab.
8. To view Pipeline information on Change Orders for the selected Contract, click the **Change Orders** folder tab.





Kentucky Transportation Cabinet (KYTC) Central Office and District Materials Engineers

## **Appendix F Exercise Answers**

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## **Section One – Getting Started**

### **Summary Exercise for Section 1.**

3. The Pavement Structural Design Data icon is located on the Mix Design panel. To get there, Main Panel→Materials Management(+)  
→Mix Design(+)
6. The Sampling and Testing Requirements icon is located on the Main Panel→Materials Management(+)  
→Material Information panel and the Main Panel→Materials Management(+)  
→Sampling and Testing panel.
9. The Welders icon is located on the Main Panel→Materials Management(+)  
→Approved Lists(+)  
panel.

## **Section Two – Material Information**

### **Exercise 2-2**

3. LASP-BINDERS
4. GALLONS

### **Exercise 2-3**

1. Eleven
2. Yes.

### **Exercise 2-4**

4. There is no minimum.
- 5.. 5500.

### **Exercise 2-5**

7. 25 and 60.

### **Exercise 2-6**

4. The conversion factor is 1.0.

### **Exercise 2-7**

2. Project Acceptance.
3. Test Results.
4. 1 per 6,500.



### **Summary Exercise for Section 2**

3. 25
6. 1.0
7. 1 per 50,000.

## **Section Three – Contract Materials**

### **Exercise 3-2**

4. Process Status, Generate, Outstanding Item List

### **Exercise 3-3**

2. Run the KYTC Outstanding Item List report.

### **Exercise 3-4**

5. Twenty-one.
7. Gallons.
- 8.. 1.0.
- 9.. 227.

### **Exercise 3-5**

1. LA%\_CHANGE, LAORIG\_DSR, LAPAV\_DSR, LAPG\_STIFF, LAPGMVALUE, LARTFO\_DSR.
3. 1 to 6,500.
- 4.. Contractor.

### **Summary Exercise for Section 3**

4. 1.0
5. 665
6. AGFINEQUAL, AGSANDEQUIL
7. 1 PER 50,000 AND 1 PER 10,000

## Section Four – Sampling and Testing

### Exercise 4-1

5. 10455-BASE AGG-DGA
7. 1+00, RIGHT.
9. Yes.
12. 1.

### Exercise 4-8

5. The sample record is grayed out.

### Summary Exercise for Section 4

#### Exercise 1

1. From the Main Panel go to Materials Management → Sampling and Testing → Sample Information
2. On the Basic Sample Data folder tab, Click the New button.
3. In the Sample ID field, enter a valid ID in the following format:  
**DDCCIIIYY####.**



*Remember, **DD** – use your District number. **CCC** – use your Crew number. **III** – Use your initials ALL UPPERCASE. **YY** – Use the current year. **####** - Start each year with the sequence number 0001.*

4. Because we have just received the sample, in the **Status** drop-down list, click the expand arrow to the right of the current selection and click PENDING.
5. The sample is being logged in today, so in the Log Date field, type today's date.
6. Since we are testing the material for a specific project, in the Smpl Type drop-down list, click the expand arrow to the right of the current selection and click Project Acceptance.
7. The material will be accepted base on test results, therefore, in the Actp Method drop-down list, click the expand arrow to the right of the current selection and click Test Results.
8. Using the right mouse button, click the Material field.
9. From the object menu, click Search.
10. In the Search window, select Material Code 10450-BASE AGG-CSB.
11. Using the right mouse button, click the Sampler field.
12. From the object menu, click Search.
13. In the Search window, double-select sfoster – Stephen Foster.
14. Using the right mouse button, click the P/S field.
15. From the object menu, click Search.
16. In the Search window, select Code AGP000501-ROGERS GROUP@CANTON.
17. In the Geog Area drop-down list, select your district since this project is located in your district.
18. In the Intd Use field, enter SUBGRADE. Remember, enter the value in all uppercase.
19. Click the Save button.
20. Click the Addtl Sample Data folder tab.
21. In the Station field, enter the value 1+00.
22. In the Offset field, enter the value RIGHT.
23. Select the Include Standard Remarks checkbox. You will always want to check this field.
24. Click the Save button.

25. Click the Contract folder tab.
26. Click the New button.
27. The Select Contract/Material Information dialog box opens.
28. Using the *right* mouse button, click the Contract ID field.
29. From the object menu, click Search.
30. In the Search window, double-click Contract 000753.
31. In the Project Number/Line Item Number list box, scroll to and click Project Number X048042104002, Line Item Number 0073.
32. Click Ok.
33. In the Represented Quantity field, type 50.
34. Click the Save button.
35. Click the Tests folder tab.
36. Using the *right* mouse button, click the Test Method field.
37. From the object menu, click Search.
38. In the Search window, scroll to and double-click Test Method AGK-200-FINER THAN NO. 200 KY.
39. Press the Tab key.
40. Using the *right* mouse button, click the Lab ID field.
41. From the object menu, click Search.
42. In the Search window, scroll to and click Lab ID T0001.
43. Click Ok.
44. In the Sample Test Nbr field, type 1.
45. In the Received Date field, enter 11/20/06.
46. Click the Save button.

**Exercise 2**

1. Enter 11/23/06 in the Actual Start Date.
2. Click the Save icon located on the toolbar.
3. Click test AGKY-200 in the top pane window.
4. Click the Services menu and click the Enter/View Test Data choice.
5. Enter the following information:

|  |      |
|--|------|
| Mass of Pycnometer, Water and the Test Portion before washing. | 6063 |
| Mass of Pycnometer, Water and the Test Portion After Washing   | 5850 |
| Mass of Pycnometer and Water                                   | 4183 |

5. Click the Save icon located on the toolbar.
6. Click the Close button located on the toolbar to return to the Sample Record.
7. Click the Services menu and click the Testers choice.
8. Click the New Icon.
9. Using the *right* mouse button, click the Tester ID field.
10. From the object menu, click the Search choice.
11. In the Search window, scroll to and double-click cjones-Chris Jones.
12. Click the Save button.
13. Click the Close button

**Exercise 3**

1. In the Actual Completion Date field on the test tab, enter 11/25/06.
2. Click the Save button.
3. Click the Basic Sample Data folder tab.
4. In the Status field, select the Failed option.
5. Click the Services menu and click Authorize.
6. Click the Save button.
7. Click the Close button.

**Exercise 4**

1. Double-click the Sampling Information icon.
2. Click the Open button.
3. In the Sample ID list box, scroll to Sample ID you created in the previous exercise..
4. Click the OK button.
5. This sample failed and the action taken needs to be documented. Click the Services menu and click the Disposition Remarks choice.
6. Enter the following comment:  
 ACTIONS TAKEN: Material is being retested.
7. Close the Disposition window by clicking Services →Disposition Remarks once again.
8. Click the Save icon located on the toolbar.
9. Lets Revise this sample.  
 Click the Services menu and click the Revise choice.
10. In the Smpl ID field, enter the same Sample ID with the characters “RV01” added to the end to indicate this is a revised sample.  
 Example: 01312SCF060002RV01



*Short Cut: Place your mouse over the sample id in the Revising field. Right click your mouse. A green box will appear with the sample id. If a green box does not appear, a popup window will appear. Select Show Detail in the popup window. Highlight the sample id and perform a Ctrl-C on your keyboard to copy this sample id. Click in the Smpl ID field and perform a Ctrl-V on your keyboard to copy the sample id. Now all you have to do is add RV01 to the end of the sample id. This will ensure the Sample ID is correct.*

11. Click the Save icon located on the toolbar.
12. Click the Tests tab.
13. Enter 12/02/06 in the Received Date field.
14. Enter 12/03/06 in the Actual Start Date field
15. .
16. Click test AGKY-200 in the top pane window.
17. Click the Services menu and click the Enter/View Test Data choice.
18. Enter the following information:

|  |      |
|--|------|
| Mass of Pycnometer, Water and the Test Portion before washing. | 6063 |
| Mass of Pycnometer, Water and the Test Portion After Washing   | 5922 |
| Mass of Pycnometer and Water                                   | 4183 |

19. Click the Save icon located on the toolbar.
20. Click the Close button located on the toolbar to return to the Sample Record.
21. Click the Services menu and click the Testers choice.
22. Click the New Icon.
23. Using the *right* mouse button, click the Tester ID field.
24. From the object menu, click the Search choice.
25. In the Search window, scroll to and double-click cjones-Chris Jones.
26. Click the Save button.

27. Click the Close button
28. In the Actual Completion Date field on the test tab, enter 12/04/06.
29. Click the Save button.
30. Click the Basic Sample Data folder tab.
31. In the Status field, select the Completed option.
32. Click the Services menu and click Authorize.
33. Click the Save button.

## **Section Five – Mix Designs**

### **Exercise 5-1**

5. Material Code 41295-PCCP

### **Summary Exercise for Section 5**

2. Scott Quire
4. 40905-CLASS A CONCRETE
6. 4+2.5+2.25+1.25

## **Section Six – Approved Materials**

### **Exercise 6-1**

5. Certification

### **Exercise 6-3**

3. Concrete ACI
4. 10/18/10

### **Exercise 6-4**

5. 10/20/05

### **Exercise 6-5**

2. \$40.00

### **Exercise 6-6**

3. Yes.

### **Exercise 6-7**

2. No.

### **Exercise 6-8**

5. Qualified.

### **Exercise 6-9**

3. Yes.

### **Exercise 6-10**

4. Yes.

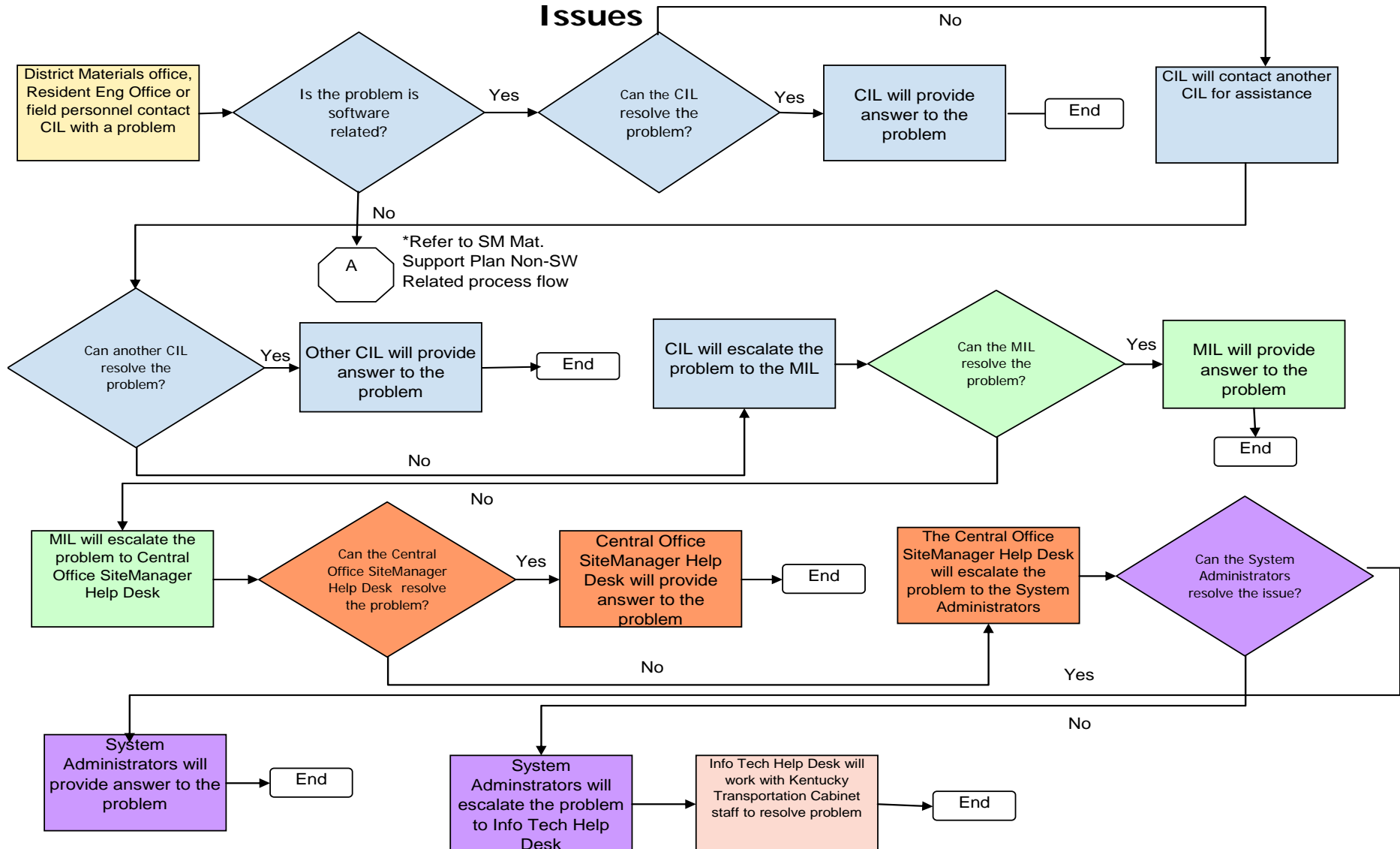
### **Exercise 6-11**

2. The user in the previous exercise and SiteManager remembers
3. Concrete ACI

### **Summary Exercise 6**

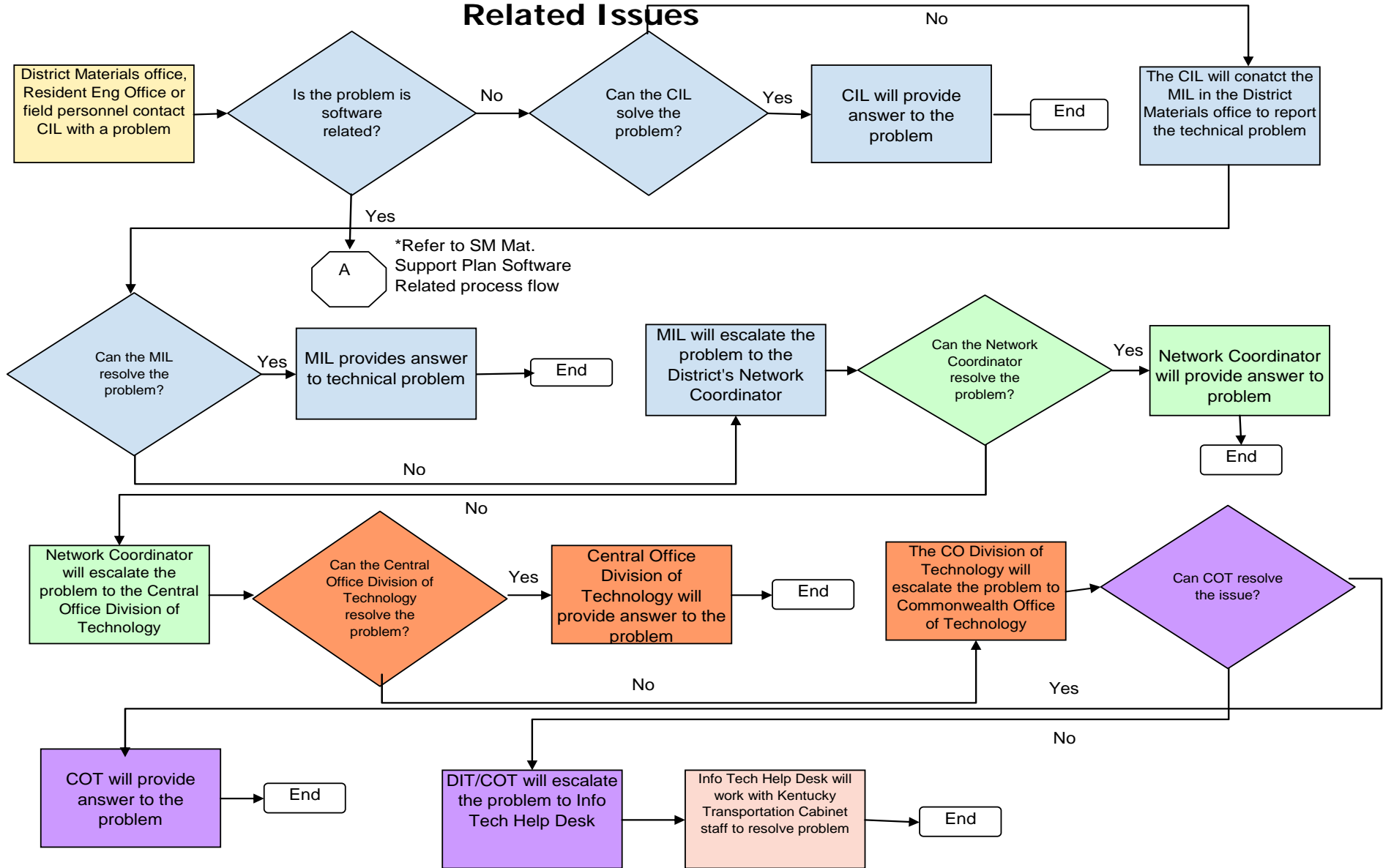
1. Shielded Metal Arc – Overhead and Vertical Groove
2. Tim Upchurch
3. Concrete ACI
4. COCONCCOMP, COCONPLAS, COPRESTRES

## SiteManager Materials Support Plan Flowchart for Software Related Issues





## SiteManager Materials Support Plan Flowchart for Non-Software Related Issues



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