## Contract Activation and materials generation Procedure

- When HQ Finance Staff (TDOT Finance) activates contract a Database trigger [Customization: MTC022] sends an email that notifies REG - M&T Supervisor, ADMIN - M&T Regional Support, ADMIN -Operations Regional Support, and FIELD - Operations Office Staff personnel that the contract has been activated.
- 2. REG M&T Supervisor runs the *Outstanding Item List report* to identify any remaining outstanding items. These are items that have no materials (not even 999.99.999 or 000.00.000). Usually new items that have not had materials identified on the Global level.
  - i. Navigate to *Contract Material* window of SiteManager:



ii. Select contract. Then from the *Services* window select *Outstanding Item List* 

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🔏 Contra	Generate	Ctr	I+Shift+T	
	Outstanding	Item List Ctrl	+Shift+U	
	Regenerate	Ctri	I+Shift+R	
Conti	act ID	Fed St/P	rov Prj Nbr	Status
	Primary Co	unty		Location
1PILOT		HSIP-61(34)		Active
A	NDERSON		including grading,	, drainage and paving.
CDB092		STP-317(12)		Active
F	IAMILTON		DESIGN BUILD C	CONTRACT ON SR 317
CDR091		DD.CTD.104(22)		Active
		JDH-91F-104(23)		pouro
	AASHT( ile Edit Contra Contra	AASHTO SiteManager ile Edit Services Windov Process Statu Contra Contract ID Primary Co IPILOT ANDERSON CDB092 HAMILTON	AASHTO SiteManager ile Edit Services Window Help Process Status Contra Contract ID Fed St/P Primary County IPILOT HSIP-61(34) ANDERSON CDB092 STP-317(12) HAMILTON DDB091 BB-STP-104(23)	AASHTO SiteManager ile Edit Services Window Help Process Status Contra Generate Ctrl+Shift+T Outstanding Item List Ctrl+Shift+U Regenerate Ctrl+Shift+R Contract ID Fed St/Prov Prj Nbr Primare County IPILOT HSIP-61(34) ANDERSON including grading [CDB092 STP-317(12) HAMILTON DESIGN BUILD (

- iii. Note: Report prints to default printer as soon as Outstanding Item List is selected from menu. To print to a PDF, set your default printer to a PDF writer.
- 3. If any items appear on the list, REG M&T Supervisor sends the list to the **TDOT.SiteManagerMaterials@tn.gov** email address for the recipients to identify the roles responsible for defining the global sampling and testing requirements for the outstanding items on the contract.

- 4. If the Outstanding Item List report is blank, REG M&T Supervisor generates contract materials.
- 5. Next we will generate contract materials using the same window:
  - i. Make sure you have selected the contract you want to generate materials for in the *Contract Materials* window
  - ii. From the Services menu select Generate
  - iii. Contract will automatically be removed from list and materials with global S&T requirements are linked to all contract items.
- 6. Immediately after generating contract materials, run BOE report *RR005 Materials Sampling Checklist*.
  - i. Select your contract.
  - ii. Select ALL Project Numbers
  - iii. Select ALL items
  - iv. Select "Y" in the "Only Display data for 999 Materials" drop down box
  - v. Select OK button and report will open.

w - Materials Sampling Checklist P		urus •		
r prompt values.	1000_10MIX			
lect Contract, Project Numbers and Item Codes				
ect Contract (Required):				
4PILOT	•			
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vailable Values:		Selected Values:		
36001-3290-14		36001-3290-14		
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203-01		203-01		
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203-01.79 203-02.01	2	203-02.01		
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ly Display data for 999 Materials: Y/N				
Y	-			
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7. Select the *Export this report* button and export to PDF.

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View - Materials Sampling Checklist RR00:		File Format:
📄 🍯 🗐 Parameters 🎦 Group Tree 🛛 🕅 🔳	A	Pag Crystal Reports (RPT)
		PDF
Export this report	-	Microsoft Excel (97-2003)
		Microsoft Excel (97-2003) Data-Only

8. We now open the *Contract Sample and Testing Requirements* window:

👫 SiteMa	nager Panel		×
	Main Panel	Materials Management(+)	Contract Materials(+)
Contr- Mater	ct Contract als Sampling and Testing		

9. Find each item on report RR005 by matching the "*Line Item* <u>Number</u>"

1	Select Contract/N	Naterial Information		
	Contract Project/Line It	tem	4PILOT 36001-3290-14, 0460	), STREA
Item     Project Number:     36001-3290-14       Item Code:     209-03.55     Item Unit:     Each       Item Description:     STREAM MITIGATION (DESCRIPTION)     Category Number:     0470	Find : Project/Line Item Project Number 36001-3290-14 PS001-3290-14	Line Item Number 0460	P oposal Line Numbe	r STREAN
Material Code: 999.99.999 Material Name: No Test Assigned	36001-3290-14 36001-3290-14	0480 0490	0 20 0 30	STREAD
Requirements (Testing)	36001-3290-14	0500	0 <mark>-</mark> 40	PLACIN
Sample Type: Information Only   Acceptance Method: Information Only   Test Method Description: M020 - Visually Accepted	36001-3290-14	0510 III	0 50 OK Cancel	SEDIME

In the *Contract Sample and Testing Requirements* window, REG - M&T Supervisor associates the proper materials in place of the placeholder material to the contract item, sets the conversion factor, and associates appropriate tests.

 REG - M&T Supervisor deletes the placeholder material, 999.99.999 – No Test Assigned from the Contract Sample and Testing Requirements window.

Contract Sample	and Testing Requirement	ts				
Materials	Sample and Tes	ting				
Contract 4PILOT	Project 36001-3290-1	4 Line It	em Nbr 0350	Bid Item Code	203-01.79	
Item Unit C.Y.						
Proposal Line Nbr:	0370					
Desc. 1:	EXCAVATION/BACKFILL					
Desc. 2:						
Supp Desc1						
Supp Desc2						
Material Code	Material Full Name				1.01	1
	Material i uli Mallie		Stat	us Materi	al Short Name	
999.99.999	No Test Assigned		A	us Materi No Tes	ai Short Name tAssigned	
999 99 999 Material Coc Conversion Fact	le: [993.99.999 or: 1.00000]	No Test As	signed Approved Source	us Mater No Tes 2e Required	A Short Name	

- 11. Next the correct material(s) and test(s) need to be added to the item.
  - i. Click the "New" icon at the top of the window.

ii. Enter material code, conversion factor, and Special Instruction (special instruction is optional) and save. NOTE: use zero conversion factor if you do not want money withheld from the contractor if all tests are not performed.

Materials   Sample and Testing     ontract   4PILOT   Project   36001-3290-14   Line Item Nbr   0350   Bid Item Code   203-01.79     em Unit   CY.   roposal Line Nbr:   0370   Desc. 1:   EXCAVATION/BACKFILL     Desc.   2:   Supp Desc1   Supp Desc2     Material Code   Material Full Name   Status   Material Short Name     205.04.001   Embarkment Material (Unclassified)   Unclass Embarkment     Material Code:   205.04.001   Embankment Material (Unclassified)   Inclass Embarkment     Material Quantity:   1.00000   Approved Source Required   Imaterial Quantity:   Sample must be sent to M&T lab for testing before use   Imaterial Code:   Sample must be sent to M&T lab for testing before use	Contract Sample	and Testing Requireme	ents			
ontract   4PILOT   Project   36001:3290:14   Line Item Nbr   0350   Bid Item Code   203:01.79     em Unit   CY.   roposal Line Nbr:   0370   Desc. 1:   EXCAVATION/BACKFILL     Desc.   1:   EXCAVATION/BACKFILL   Desc. 2:   Supp Desc1     Supp Desc2   Status   Material Short Name     205.04.001   Embarkment Material (Unclassified)   Unclass Embarkment     Material Code:   205.04.001   Embarkment Material (Unclassified)     Conversion Factor:   1.00000   Approved Source Required     Material Quantity:   Material Unit: [Cubic Yard      Special Instruction:   Sample must be sent to M&T lab for testing before use	Materials	Sample and T	esting			
Contract   4PILOT   Project   36001-3230-14   Line Item Nbr   0350   Bid Item Code   203-01.79     tem Unit   C.Y.   Proposal Line Nbr:   0370   Desc. 1:   EXCAVATION/BACKFILL     Desc. 1:   EXCAVATION/BACKFILL   Osc. 2:   Supp Desc1   Supp Desc2     Material Code   Material Full Name   Status   Material Short Name     205:04.001   Embankment Material (Unclassified)   Unclass Embankment     Material Code:   205:04.001   Embankment Material (Unclassified)     Conversion Factor:   1.00000   Approved Source Required     Material Quantity:   Material Unit:   Cubic Yard   Embankment to M&T lab for testing before use						
Item Unit   CY.     troposal Line Nbr:   0370     Desc. 1:   EXCAVATION/BACKFILL     Desc. 2:	ontract 4PILOT	Project 36001-3290	0.14 Line Item M	lbr 0350 Bid	Item Code 203-01.79	
Image: Second	em Unit C.Y.					
Desc. 1:   EXCAVATION/BACKFILL     Desc. 2:	roposal Line Nbr:	0370				
Desc. 2: Supp Desc2 Waterial Code Material Full Name Status Material Short Name 205.04.001 Embarkment Material (Unclassified) Unclass Embarkment Material Code: 205.04.001 Embankment Material (Unclassified) Conversion Factor: 1.00000 Approved Source Required Material Quantity: Material Unit: Cubic Yard Special Instruction: Sample must be sent to M&T lab for testing before use	Desc. 1:	EXCAVATION/BACKFILI	L			
Supp Desc1     Supp Desc2     Material Code   Material Full Name     Status   Material Short Name     205.04.001   Embankment Material (Unclassified)     Unclass Embankment   Material Code:     205.04.001   Embankment Material (Unclassified)     Material Code:   205.04.001     Embankment Material (Unclassified)   Conversion Factor:     1.00000   Approved Source Required     Material Quantity:   Material Unit: [Cubic Yard     Special Instruction:   Sample must be sent to M&T lab for testing before use	Desc. 2:					
Supp Desc2     Material Code   Material Full Name   Status   Material Short Name     205.04.001   Embankment Material (Unclassified)   Unclass Embankment     Material Code:   205.04.001   Embankment Material (Unclassified)     Material Code:   205.04.001   Embankment Material (Unclassified)     Conversion Factor:   1.00000   Approved Source Required     Material Quantity:   Material Unit: [Cubic Yard       Special Instruction:   Sample must be sent to M&T lab for testing before use	Supp Desc1					
Material Code   Material Full Name   Status   Material Short Name     205.04.001   Embankment Material (Unclassified)   Unclass Embankment     Material Code:   205.04.001   Embankment Material (Unclassified)     Material Code:   205.04.001   Embankment Material (Unclassified)     Conversion Factor:   1.00000   Approved Source Required     Material Quantity:   Material Unit:	Supp Desc2					
205.04.001   Embankment Material (Unclassified)   Unclass Embankment     Material Code:   205.04.001   Embankment Material (Unclassified)     Conversion Factor:   1.00000   Approved Source Required     Material Quantity:   Material Unit:   [Cubic Yard     Special Instruction:   Sample must be sent to M&T lab for testing before use   [Sample must be sent to M&T lab for testing before use						
Material Code:   205.04.001   Embankment Material (Unclassified)     Conversion Factor:   1.00000   Approved Source Required     Material Quantity:   Material Unit: [Cubic Yard   Image: Comparison Source Source Required     Special Instruction:   Sample must be sent to M&T lab for testing before use   Image: Comparison Source Required	Material Code	Material Full Name		Status	Material Short Name	
Conversion Factor:   1.00000   Approved Source Required     Material Quantity:   Material Unit:   Cubic Yard   Employed     Special Instruction:   Sample must be sent to M&T lab for testing before use   Employed   Employed	Material Code 205.04.001	Material Full Name Embankment Material (U	nclassified)	Status	Material Short Name Unclass Embankment	
Material Quantity: Material Unit: Cubic Yard   Special Instruction: Sample must be sent to M&T lab for testing before use	Material Code 205.04.001 Material Co	Material Full Name Embankment Material (Ur de: 205.04.001	nclassified)	Status	Material Short Name	
Special Instruction: Sample must be sent to M&T lab for testing before use	Material Code 205 04 001 Material Co Conversion Fac	Material Full Name Embankment Material (U de: 205.04.001	nclassified) Embankment Me	Status sterial (Unclassified)	Material Short Name	
Special instruction: Sample must be sent to main lab for testing before use	Material Code 205 04 001 Material Co Conversion Fac	Material Full Name Embankment Material (U) de: [205.04.001 to: 1.00000	nclassified) Embankment Me	Status aterial (Unclassified) proved Source Rec	Material Short Name	
	Material Code 205 04:001 Material Co Conversion Fac Material Quan	Material Full Name Embankment Material (U de: 205.04.001 tor: 1.00000 ity:	nclassified) Embankment Me C App Material Unit: Cu	Status aterial (Unclassified) proved Source Ren bic Yard	Material Short Name	

iii. Next, click on the *Sample and Testing* tab. Select the new icon and enter data for each test that will be required for the material.

Contract Sample a	nd Testing Requ	irements			
Materials	Sample a	and Testing			
ntract 4PILOT	Project 3600	1-3290-14 Line Item Nb	r 0350 Bid	Item Code 203-01.79	
n Unit C.Y.					
posal Line Nbr: 🛛	0370				
Desc. 1:	EXCAVATION/BA	CKFILL			
Desc. 2:					
Supp Desc1					
Supp Desc2					
aterial Code	Material Full Na	me	Status	Material Short Name	
5.04.001 E	Embankment Mate	rial (Unclassified)		Unclass Embankment	
Producer Sup	oplier Code	Sample Type	Acc	reptance method	Test Method
Producer Sup	oplier Code	Sample Type Information Only	Acc Information On	reptance method	Test Method T100 T98
Producer Sup	splier Code	Sample Type Information Only Information Only	Acc Information On Information On	eptance method ly ly	<b>Test Method</b> T100 T88 T89
Producer Sup	oplier Code	Sample Type Information Only Information Only Information Only Information Only	Acc Information On Information On Information On	reptance method ly ly ly ly	<b>Test Method</b> T100 T88 T89 T99
Producer Sup roducer Supplier	oplier Code	Sample Type Information Only Information Only Information Only Information Only	Acc Information On Information On Information On	reptance method dy dy dy dy	<b>Test Method</b> T100 T88 T89 T99
Producer Sup roducer Supplier Sample	oplier Code Code: Type: Informatic	Sample Type Information Only Information Only Information Only Information Only	Acc Information On Information On Information On Information On	reptance method dy dy dy dy dy <b>hod:</b> [Information Only	Test Method T100 T88 T89 T99 ▼
Producer Sup roducer Supplier Sample Test Mi	oplier Code Code:   Type:  Informatic ethod:  T99	Sample Type Information Only Information Only Information Only Information Only Information Only Information Only Information The Information The Information Type Information Type	Acc Information On Information On Information On Cceptance Mett Moisture-Density F	reptance method dy dy dy dy nod: Information Only Relations of Soils	Test Method T100 T88 T89 T99
Producer Sup roducer Supplier Sample Test M	Code: Type: Informatio thod: T99	Sample Type Information Only Information Only Information Only Information Only Information Only Information Only Information Only Information The Information Information Only	Acc Information On Information On Information On Ccceptance Mett Moisture-Density F	reptance method ly ly ly ly hod: Information Only Relations of Soils ate	Test Method T100 T88 T89 T99
Producer Sup roducer Supplier Sample Test M Sample Log	Deplier Code Code: Type: Informatio ethod: T99	Sample Type Information Only Information Only	Acc Information On Information On Information On Ccceptance Mett Moisture-Density R R	eptance method ly ly ly ly hod: Information Only Relations of Soils ate 1 Samples per.:	Test Method T100 T88 T89 T99 Frequency 99,999.000
Producer Sup Producer Supplier Sample Test M Sample Loc Sample	Code: Type: Information thethod: T39 Sation: Placement Units: Definition	Sample Type Information Only Information Only	Acc Information On Information On Information On Ccceptance Met Moisture-Density F Ra	eptance method ly ly ly ly ly hod: Information Only Relations of Soils ate I Samples per.:   Sample Size:	Test Method       T100       T88       T89       T99       ▼       Frequency       99,999.000

- iv. Repeat this process for additional materials linked to the item. Save.
- v. Continue the previous steps for all items with the 999.99.999 material code.
- 12. Once all instances of items with **999.99.999 No Test Assigned** have been addressed, the REG - M&T Supervisor enters the *Contract Materials Ready* key date.

i. Navigate to the Key Dates window: Main Panel/Contract Administration/Contract Records/Key Dates



ii. Enter the date this task was completed:

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
CC-3	00/00/00	00/00/00	N	N
Completion Notice (Date Time Stopped)	00/00/00	00/00/00	N	N
inal Inspection	00/00/00	00/00/00	N	N
Final Records Submittal	00/00/00	00/00/00	N	N
DT1696 Materials and Tests Certification	00/00/00	00/00/00	N	N
Notice of Termination	00/00/00	00/00/00	N	N
Starting Notice	00/00/00	00/00/00	N	N
Contract Materials Ready				
Key Date Type: Contract Materials Ready		Required	to Activate	N
		Required	to Finalize	
Actual Date: 00/00/00				
Actual Date: 00/00/00		Becinient		_