

## Section 8: How to Add, Change or Delete a Contract Acceptance Action

Applicable Roles:

1. Materials Regional Coordinators
2. District Materials Sup. & Office Coord.

In the case where a Contract either does not require testing or needs an ST1/DMIR, the **Contract Materials Acceptance Action needs to be adjusted.**

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### 8-1 NAVIGATE TO ACCEPTANCE ACTIONS FOR CONTRACT

Go to the **Home Page.**

Click on **Contract Administration.**

Home Previous My Pages Actions Help Log off

On this page: Construction Materials Materials Worksheets Materials Reference Data System Administration

PROJECT Materials Regional Coordinators User (Materials)

Materials ? Construction ?

Daily Source Reports Change Order

Mix Design Contract Administration

Sample Records Contract Progress

(8-1)

This will take you to the **Contract Administration Overview Page.**

In the Search Box Enter the **Contract ID Number.**

Click on the **eraser icon** (to the right)

**NOTE:** If Contract ID Number doesn't come up, click on **show first 10.**

Contract Administration Overview

Contract Administration Overview ?

2017001357 System Default Showing 1 of 1

0 changed

Contract	Description	Orig Matl and AAs Gen DT	Prime ID	Prime Name
2017001357	FAIRMONT SIDEWALK	11/21/2022 12:25:12 PM	84-4295582	BLUE GOLD DEVELOPMENT LLC

(8-2)

Right click on the **Contract ID Number**.

Click on **open link in new tab**.



(8-3)

Click on the **new tab** you just opened.

This takes you to the **Contract Administration Summary Page**.

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## 8-2 NAVIGATE TO CONTRACT MATERIALS AND ACCEPTANCE ACTIONS

Click on **Contract Materials and Acceptance Actions** (top of the page).



(8-4)

This takes you to the **Contract Materials and Acceptance Actions Summary Page**.

Click on **Acceptance Actions** (on the left).

Contract Materials and Acceptance Actions Summary

Contract : 2017001357 - FAIRMONT SIDEWALK Save ?

Materials

Acceptance Actions  Line Item Sort Showing 49 of 49 Item Source: No Filter

Line Item Certification 0 changed

(8-5)

### 8-3 DELETING AN CONTRACT ACCEPTANCE ACTION

In the **Search Box**, Enter the **Line Number**.

**NOTE:** Always use leading 0s, such as 0020 instead of just 20.

Contract Materials and Acceptance Actions Summary

Contract : 2017001357 - FAIRMONT SIDEWALK Save ?

Materials

Acceptance Actions  0. Line Item Sort Showing 2 of 2 Item Source: No Filter

Line Item Certification 0 changed Expand All

Project	Item	Proj Ln Num
2017001357	604050-012	0035
Material	Material Category	Material Set
704.006.002.01 - Class 1 Aggregate - Base or S	AGGR - Aggregate	Default

(8-6)

The Materials associated with the Line Number are displayed.

Click the **Arrow (>)** to the Left of Project.

Contract : 2017001357 - FAIRMONT SIDEWALK Save ?

Materials

Acceptance Actions  0. Line Item Sort Showing 2 of 2 Item Source: No Filter

Line Item Certification 0 changed Expand All

Project	Item	Proj Ln Num
2017001357	604050-012	0035
Material	Material Category	Material Set
704.006.002.01 - Class 1 Aggregate - Base or S	AGGR - Aggregate	Default
Acceptance Action	Record Type	Record ID
APL-AS -	Material	704.006.002.01-Class 1 Aggregate - Base or S
Gradation - QA -	Material	704.006.002.01-Class 1 Aggregate - Base or S
Gradation - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or S
Limits - QAD -	Material	704.006.002.01-Class 1 Aggregate - Base or S
Limits - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or S

(8-7)

Click the ▼ (to the right) of the Acceptance Action Test you want to Delete.

Click **Delete**.

**NOTE:** In this Example, we are **Deleting** the QAD and QC Limits Testing Requirement from this Line Number.

(Repeat the 2 steps above for each Test Requirement you want to Delete).

Project	Item	Proj Ln Num
2017001357	604050-012	0035
<b>Material</b>		
704.006.002.01 - Class 1 Aggregate - Base or S	AGGR - Aggregate	Default
APL-AS -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Gradation - QA -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Gradation - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
<b>Acceptance Action</b>	<b>Record Type</b>	<b>Record ID</b>
Limits - QAD -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Limits - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
2017001357	604050-012	0035
714.019.000.3 - 12-60 inches Pipe, High Density	PIPE - Pipe	Default

(8-8)

The gray area indicates the Line Items that are going to be Deleted.

Project	Item	Proj Ln Num
2017001357	604050-012	0035
<b>Material</b>		
704.006.002.01 - Class 1 Aggregate - Base or S	AGGR - Aggregate	Default
APL-AS -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Gradation - QA -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Gradation - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Limits - QAD -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
<b>Acceptance Action</b>	<b>Record Type</b>	<b>Record ID</b>
Limits - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or Si

(8-9)

**NOTES:** You can click the Undo Arrow if you change your mind about Deleting a Material.

Project	Item	Proj Ln Num
2017001357	604050-012	0035
Material	Material Category	Material Set
704.006.002.01 - Class 1 Aggregate - Base or S	AGGR - Aggregate	Default
APL-AS -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Gradation - QA -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Gradation - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Limits - QAD -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Acceptance Action	Record Type	Record ID
Limits - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or Si

(8-10)

You can also Refresh your screen before Saving, to reset to the **previous screen**.

. Click **Save**.

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## 8-4 MODIFYING A CONTRACT ACCEPTANCE ACTION

Click on the drop-down arrow (V) (to the right) of the Material Test you are working on.

Hover your mouse over the Test you are wanting to change. In this case, a Gradation – QC,

Right click on Test you want to open.

Click **Open**.

Material	Material Category	Material Set
704.006.002.01 - Class 1 Aggregate - Base or S	AGGR - Aggregate	Default
APL-AS -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Gradation - QA -	Material	704.006.002.01-Class 1 Aggregate - Base or Si
Acceptance Action	Record Type	Record ID
Gradation - QC -	Material	704.006.002.01-Class 1 Aggregate - Base or Si

Actions  
 Open

(8-11)

This takes you to the **Contract Acceptance Action Summary Page**.

Scroll down to the **Option Name** and click on the > (on the left) of the **Option Name**.

Contract Acceptance Actions Summary

Contract Acceptance Actions: Gradation - QC Save

Contract: 2021000836 - PATTESON DR RRFB Project: 2021000836 Item: 307001-000 - AGGREGATE BASE COURSE, CLASS

Name *	Description
Gradation - QC	
Evaluation Method *	Project ID
Record Count	2021000836
Contract	Project Item Line Number
2021000836 - PATTESON DR RRFB	0025
Item	
307001-000 - AGGREGATE BASE COURSE, CLASS	

New 0 added | 0 marked for deletion | 0

> Option Name *	Option Description
Blended Aggregate Gradation - QA/QC	

(8-12)

On this page you can change the **Frequency Type**, as well as other Options including:  
Action Rate 1, Frequency Type - Contract (Action Frequency Blank) – 1 per contract

> Option Name *	Option Description
Blended Aggregate Gradation - QA/QC	
> Sample Record	QC - SR - AWP703.1B - WV
Action Type	Action Relationship Description
	QC - SR - AWP703.1B - WV
Action Documentation Type	Effective Date
Sample Record	01/01/2019
Expiration Date	Action Frequency
	1.000
Action Rate	Minimum Quantity Required
1	
Frequency Type	Exclude from Pay Est
Temporal	<input type="checkbox"/>
Temporal Type	
Day	

(8-13)

Action Rate 1, Frequency Type – Quantity, Action Frequency 1000 (1/1000 tons etc.)

Option Name *		Option Description	
Blended Aggregate Gradation - QA/QC			
Sample Record		QC - SR - AWP703.1B - WV	
Action Type		Action Relationship Description	QC - SR - AWP703.1B - WV
Action Documentation Type		Effective Date	01/01/2019
Sample Record		Action Frequency	1,000,000
Expiration Date		Minimum Quantity Required	
Action Rate	1	Exclude from Pay Est	<input type="checkbox"/>
Frequency Type	Quantity		

(8-14)

The **Minimum Quantity Requirement** is currently **NOT** being used.

If the **Exclude from Pay Estimate Check Box**  is checked, this will **OVERRIDE** the **Acceptance Action** and pay the contractor.

But there will still be a material exception that needs to be resolved before the Final Estimate.

Regardless of the actions you perform, you must click **Save**.

## 8-5 CREATING A NEW CONTRACT ACCEPTANCE ACTION

In this Example, we are going to **Add a DMIR to this Contract** for the Compaction – QC.

First, we will Delete the original **Acceptance Action** as discussed earlier.

Project	Item	Proj Ln Num
2021000836	307001-000	0025
Material	Material Category	Material Set
704.006.002.01 - Class 1 Aggregate - Base oi	AGGR - Aggregate	Default
Compaction-QA -	Material	704.006.002.01-Class 1 Aggregate - Base oi
Acceptance Action	Record Type	Record ID
Compaction-QC -	Material	704.006.002.01-Class 1 Aggregate - Base oi
Gradation - QA -	Material	704.006.002.01-Class 1 Aggregate - Base oi
Gradation - QC -	Material	704.006.002.01-Class 1 Aggregate - Base oi

(8-15)

Click on **Acceptance Actions**.

Click the **▼ Action Menu** button (on the right) associated to the Material, (**NOT** the Line where the Test is listed).

Do **NOT** click the **Action Menu** button near the **Save**.

From the **Action Menu**, click **Create Contract Acceptance Action**.

Contract : 2021000836 - PATTESON DR RRFB

Materials  
Acceptance Actions  
Line Item Certification

0025 0. Line Item Sort Showing 1 of 1 No Filter

0 changed Expand All

Project	Item	Proj Ln Num
2021000836	307001-000	0025
Material	Material Category	Material Set
704.006.002.01 - Class 1 Aggregate - Base oi	AGGR - Aggregate	Default
Compaction-QA -	Material	704.006.002.01-Class 1 Aggregate - Base oi
Acceptance Action	Record Type	Record ID
Compaction-QC -	Material	704.006.002.01-Class 1 Aggregate - Base oi
Gradation - QA -	Material	704.006.002.01-Class 1 Aggregate - Base oi
Gradation - QC -	Material	704.006.002.01-Class 1 Aggregate - Base oi

- Actions
- Exclude from Search Results
- Tasks
- Create Contract Acceptance Action
- Views
- Attachments (0)
- Links
- Previously Used Sources and Facilities
- Tracked Issues

(8-17)

For the **Name**, choose the description you want to appear on the Detailed Sampling Checklist.  
(i.e. DMIR, ST-1, etc.)

**NOTE:** The following screenshots show how to **Add a DMIR**, but the steps are the same for ST-1's, etc.)

Leave the **Description** box Blank

For **Effective Date**, choose 01/01/2019

Make sure the **Status** is **Active**.

Do **NOT** modify the **Evaluation Method**.

Click **Save**.

Add Contract Acceptance Actions Summary

▼ Add Contract Acceptance Actions: Material Acceptance Save ?

Name \*  
[Redacted]

Effective Date  
mm/dd/yyyy

Expiration Date  
mm/dd/yyyy

Evaluation Method \*  
Record Count

Contract  
2021000836 - PATTESON DR RRFB

Item  
307001-000 - AGGREGATE BASE COURSE, CLASS

Description  
[Redacted]

Status  
Active

Project  
2021000836

Project Item Line Number  
0025

(8-18)

Name \*  
DMIR

Effective Date  
01/01/2019

Expiration Date  
mm/dd/yyyy

Evaluation Method \*  
Record Count

Contract  
2021000836 - PATTESON DR RRFB

Item  
307001-000 - AGGREGATE BASE COURSE, CLASS

Description  
[Redacted]

Status  
ACTIVE - Active

Project  
2021000836

Project Item Line Number  
0025

(8-19)

Add the same Value into the Option Name.

Click **Save**.

### Contract Acceptance Actions Summary

Contract Acceptance Actions: DMIR Save

Contract: 2021000836 - PATTESON DR RRFB    Project: 2021000836    Item: 219001-001 - CONTROLLED LOW STRENGTH MATERIAL, TYPE ...

Name*	Description
DMIR	[REDACTED]
Evaluation Method*	Project ID
Record Count	2021000836
Contract	Project Item Line Number
2021000836 - PATTESON DR RRFB	0020
Item	
219001-001 - CONTROLLED LOW STRENGTH MATERIAL, TYPE	

New 0 added | 0 marked for deletion | 0 chz

Option Name*	Option Description
DMIR	

(8-20)

Click the **▼ Action Menu** (on the right).

Click on **Select Action Relationship**.

Contract: 2017001357 - FAIRMONT SIDEWALK    Project Item Line Number: 0035

Item: 604050-012 - 15 INCH HIGH DENSITY POLYETHYLENE PIPE, PROFILE

New

Option Name*	Option Description
Blended Aggregate Gradation - QA/QC	

- Actions
- Delete
- Duplicate Row
- Insert Row
- Select Action Relationship
- Views
- Attachments (0)
- Links
- Tracked Issues

(8-21)

In the Search Box Enter the **Action Relationship** you are looking for.

**NOTE:** If you don't know what it should be, talk to your Regional Materials Coordinator

Select Action Relationship

Q DMIR Advanced Showing 1 of 1

Select: All None 0 selected

Action Relationship	AR Description	Action Document Type
	Use for DMIR Acceptance	Daily Work Report

(8-22)

Click on the **Action Relationship** description that appears below the Search Box.

Click on **Add to Option**.

Select Action Relationship

Q dmir Advanced Showing 1 of 1

Select: All None 1 selected

Action Relationship	AR Description	Action Document Type
✓	Use for DMIR Acceptance	Daily Work Report

Add to Option

(8-23)

Click **Save**.

Now fill out the **Acceptance Action** data as indicated above.

The screenshot shows a 'New' form for creating an acceptance action. The form is divided into two columns. The left column contains the following fields: 'Option Name\*' with the value 'DMIR', 'Action Type' with a dropdown menu showing 'Daily Work Report' (highlighted with a red circle), 'Action Documentation Type' with a dropdown menu showing 'Daily Work Report', 'Expiration Date', 'Action Rate' with an input field, and 'Frequency Type' with a dropdown menu. The right column contains the following fields: 'Option Description' with the value 'Use for DMIR Acceptance', 'Action Relationship Description' with the value 'Use for DMIR Acceptance', 'Effective Date' with the value '01/01/2019', 'Action Frequency' with a dropdown menu, 'Minimum Quantity Required' with an input field, and 'Exclude from Pay Est' with a checkbox.

(8-24)

Click **Save**.

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## 8-6 MODIFYING AN ACCEPTANCE ACTION TO MEET PROJECT NEEDS

In the case where you have **Failing Material**, you can modify the **Action Rate Frequency** to adjust for the Failing Material.

For instance, if you have Six (6) Samples, and only Five (5) Samples are Passing, you can **adjust the Action Rate to 5, and the Action Frequency to 6**.

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## 8-7 REPLACE A CONTRACT ACCEPTANCE ACTION

In the case where you have the wrong acceptance action, you will first open the acceptance action.

Contract Materials and Acceptance Actions Summary

Contract : 2022390022 - Webb Chapel Overpass Save ?

Materials

Acceptance Actions  0. Line Item Sort Showing 7 of 7 No Filter

Line Item Certification 0 changed [Expand All](#)

Project	Item	Proj Ln Num
2022390022	627016-001	0065
Material	Material Category	Material Set
601.003.002.02 - Concrete, Class K, W	PCC - Portland Cement Concrete	Default
QA - Lab -	Material	601.003.002.02-Concrete, Class K, Wi
QC - Lab -	Material	601.003.002.02-Concrete, Class K, Wi
QC - Field -	Material	601.003.002.02-Concrete, Class K, Wi
Acceptance Action	Record Type	Record ID
QA - Field -	Material	
2022390022	627016-001	
709.000.000.0 - Welding Electrodes, Pli	METL - Metal	
2022390022	627016-001	
709.001.000.2 - Epoxy Coated Reinforc	METL - Metal	
2022390022	627016-001	

Actions: Open, Tasks, Delete, Views, Attachments (0), Links, Tracked Issues

Once opened, you will delete the **existing acceptance action option** and **add a new one**.

You can check to see the current acceptance action by dropping down the option.

In our case, we will assume that PCC QA Similarity is incorrect

New 0 added 0 marked for deletion 0 changed

Option Name \*  Option Description

Sample Record PCC QA Similarity

Action Type	Action Relationship Description
Action Documentation Type	Effective Date
Sample Record	01/01/2019
Expiration Date	Action Frequency
Action Rate <input type="text" value="1"/>	Minimum Quantity Required
Frequency Type <input type="text" value="Contract"/>	Exclude from Pay Est <input checked="" type="checkbox"/>

**\_PCC QA Similarity** ✕

To delete this, click the action menu on the right of the option name and click “delete”.

The screenshot shows a software interface with a table of options. The first row is highlighted in blue and contains the following data:

Option Name	Option Description
QA - Field	
Sample Record	_PCC QA Similarity

Below the table, there are several fields for the selected option:

- Action Type: Sample Record
- Action Documentation Type: Sample Record
- Expiration Date: (empty)
- Action Rate: 1
- Frequency Type: Contract
- Action Relationship Description: \_PCC QA Similarity
- Effective Date: 01/01/2019
- Action Frequency: (empty)
- Minimum Quantity Required: (empty)
- Exclude from Pay Est:

An action menu is open on the right side of the table, showing the following options:

- Actions
  - Delete
- Views
- Attachments (0)
- Links
- Tracked Issues

You will then click the upper action menu and click “Select Action Relationship”

The screenshot shows a dialog box with the following information:

- Evaluation Method: Record Count
- Contract: 2022390022 - Webb Chapel Overpass
- Item: 627016-001 - REMOVE AND REBUILD EXPANSION JOINT
- Project ID: 2022390022
- Project Item Line Number: 0065

An action menu is open on the right side of the dialog, showing the following options:

- Actions
  - Delete
  - Duplicate Row
  - Insert Row
  - Select Action Relationship...
- Views
- Attachments (0)
- Links
- Tracked Issues

In the dialog, be sure to “Load Next XX” to find the correct action relationship. If you are unsure, consult your respective materials regional coordinator.

Once you’ve selected the correct Action Relationship, click “Add to Option”.

Select Action Relationship ✕

Advanced Showing 10 of 18

Select: [All](#) [None](#) 0 selected

Select	Action Relationship	AR Description	Action Document Type
		SR TM-AWP601.03 PCC QA/QC ST-QA AM-T	Sample Record
		SR TM-AWP601.03 PCC QA/QC ST-QC AM-T	Sample Record
		QA - TR - T22 - AV	Sample Record
		QC - TR - T22 - AV	Sample Record
		SR TM-T19 ST-QA AM-TR	Sample Record
		SR TM-T19 ST-QC AM-TR	Sample Record
		Use for ST-1 Acceptance	Daily Work Report
		Use for DMIR Acceptance	Daily Work Report
		SR TM-T121 ST-QA AM-TR	Sample Record
		SR TM-T121 ST-QC AM-TR	Sample Record

Load next 8 Showing 10 of 18

Add to Option

Select Action Relationship ✕

Advanced Showing 18 of 18

Select: [All](#) [None](#) 1 selected

Select	Action Relationship	AR Description	Action Document Type
		SR TM-AWP601.03 PCC QA/QC ST-QA AM-T	Sample Record
		SR TM-AWP601.03 PCC QA/QC ST-QC AM-T	Sample Record
		QA - TR - T22 - AV	Sample Record
		QC - TR - T22 - AV	Sample Record
		SR TM-T19 ST-QA AM-TR	Sample Record
		SR TM-T19 ST-QC AM-TR	Sample Record
		Use for ST-1 Acceptance	Daily Work Report
		Use for DMIR Acceptance	Daily Work Report
		SR TM-T121 ST-QA AM-TR	Sample Record
		SR TM-T121 ST-QC AM-TR	Sample Record
		QA - TR - ABAR - AV	Sample Record
		QC - TR - ABAR - AV	Sample Record
<input checked="" type="checkbox"/>		_PCC QA Similarity	Sample Record

Add to Option

Be sure to complete the details of the new action relationship. (1/contract etc), as this will not automatically populate.