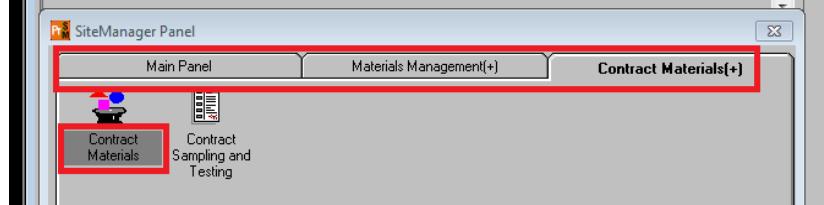


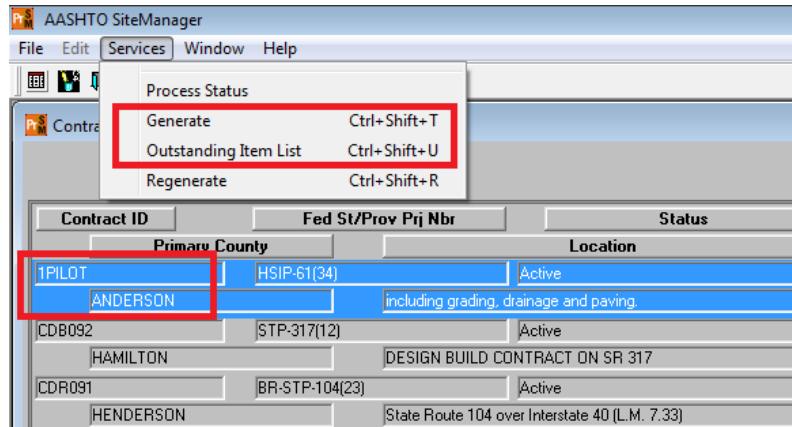
Contract Activation and materials generation Procedure

1. 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:



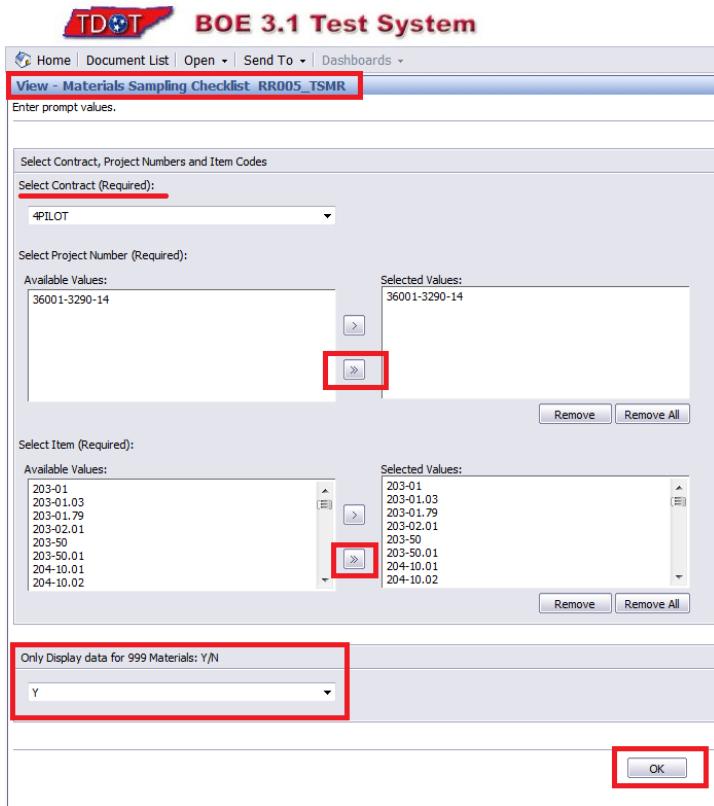
- ii. Select contract. Then from the ***Services*** window select ***Outstanding Item List***



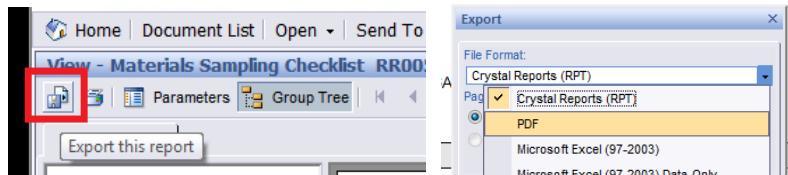
- iii. **Note: Report prints to default printer as soon as Outstanding Item List is selected from menu.** To print to a PDF, set your default printer to a PDF writer.

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.

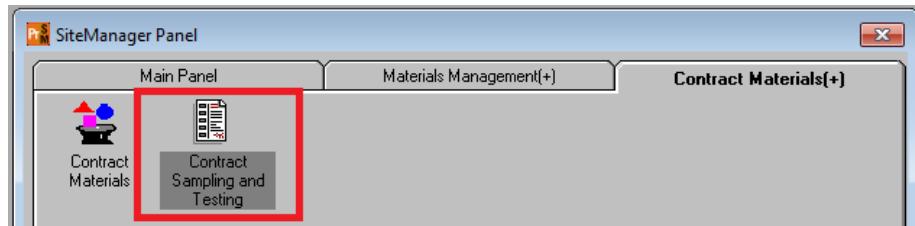
4. If the Outstanding Item List report is blank, REG - M&T Supervisor generates contract materials.
5. Next we will generate contract materials using the same window:
 - i. Make sure you have selected the contract you want to generate materials for in the ***Contract Materials*** window
 - ii. From the ***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.



7. Select the ***Export this report*** button and export to PDF.



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



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

Project Number	Line Item Number	Proposal Line Number	Description
36001-3290-14	0460	0.00	STREAM
36001-3290-14	0470	0.10	STREAM
36001-3290-14	0480	0.20	STREAM
36001-3290-14	0490	0.30	STREAM
36001-3290-14	0500	0.40	PLACIN
36001-3290-14	0510	0.50	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.

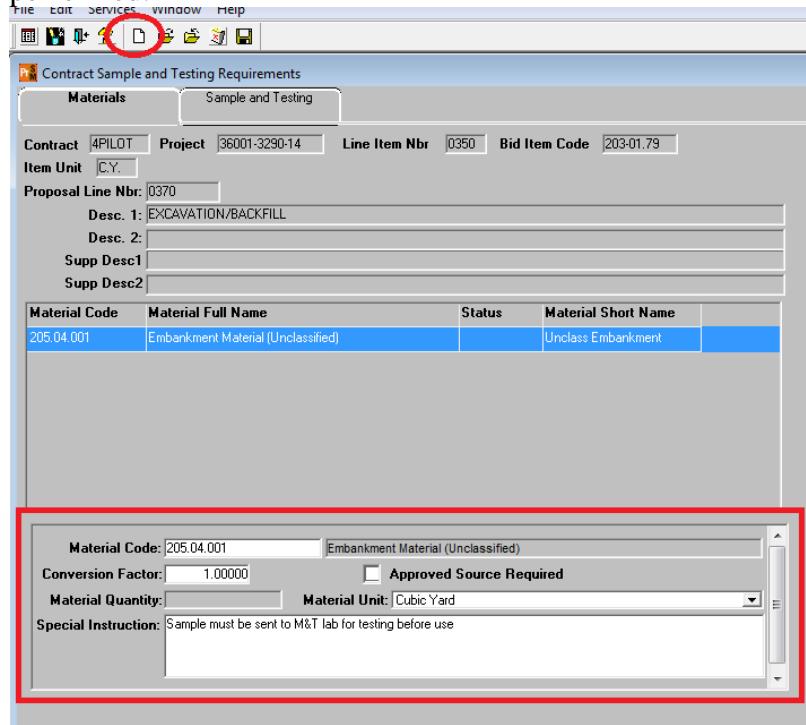
10. REG - M&T Supervisor deletes the placeholder material, **999.99.999 – No Test Assigned** from the Contract Sample and Testing Requirements window.

Material Code	Material Full Name	Status	Material Short Name
999.99.999	No Test Assigned	A	No Test Assigned

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.



- 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.

The screenshot shows the 'Contract Sample and Testing Requirements' window. At the top, there are several icons followed by the title 'Contract Sample and Testing Requirements'. Below the title, there are tabs: 'Materials' (highlighted with a red circle) and 'Sample and Testing' (also highlighted with a red circle). Underneath these tabs, there are various input fields: 'Contract' (4PILOT), 'Project' (36001-3290-14), 'Line Item Nbr' (0350), 'Bid Item Code' (203-01.79), 'Item Unit' (CY), 'Proposal Line Nbr' (0370), 'Desc. 1' (EXCAVATION/BACKFILL), 'Desc. 2' (empty), 'Supp Desc1' (empty), and 'Supp Desc2' (empty). A table below lists materials: Material Code (205.04.001), Material Full Name (Embankment Material (Unclassified)), Status (empty), and Material Short Name (Unclass Embankment). A larger table below shows testing requirements for four different producer supplier codes. The last row of this table is highlighted with a blue background. A red box highlights the bottom section of the window, which contains dropdown menus for 'Producer Supplier Code', 'Sample Type' (Information Only), 'Acceptance Method' (Information Only), and 'Test Method' (T99). It also includes fields for 'Sample Location' (Placement Site), 'Sample Units' (empty), 'Sample Responsibility' (Project Inspector), 'Test Responsibility' (Henion Lab), 'Rate' (1), 'Samples per.' (99,999.000), and 'Frequency' (empty). The entire red box is outlined with a thick red border.

Material Code	Material Full Name	Status	Material Short Name
205.04.001	Embankment Material (Unclassified)		Unclass Embankment

Producer Supplier Code	Sample Type	Acceptance method	Test Method
	Information Only	Information Only	T100
	Information Only	Information Only	T88
	Information Only	Information Only	T89
	Information Only	Information Only	T99

- 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:

The 'Key Dates' window is displayed. The 'Contract ID' field contains '4PILOT'. The main area shows a table of key dates with columns: 'Key Date Type', 'Projected Date', 'Actual Date', 'Required to Activate', and 'Required to Finalize'. A row for 'Contract Materials Ready' is selected. In the bottom section, the 'Key Date Type' dropdown is set to 'Contract Materials Ready'. The 'Projected Date' field shows '00/00/00'. The 'Actual Date' field is highlighted with a red box and contains '00/00/00'. There are two checkboxes: 'Required to Activate' (unchecked) and 'Required to Finalize' (unchecked). The 'Recipient' field is empty. The 'Message Text' field is also empty.