



MONTANA DEPARTMENT OF TRANSPORTATION

AASHTOWare Project Construction & Materials

Material Sets: Creating, Adding Material Codes, Copy an existing Material set, Project Specific & No Materials Required

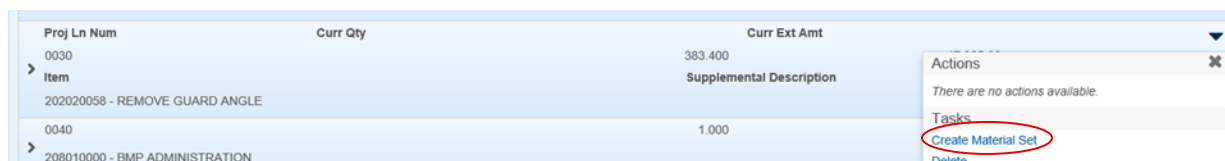
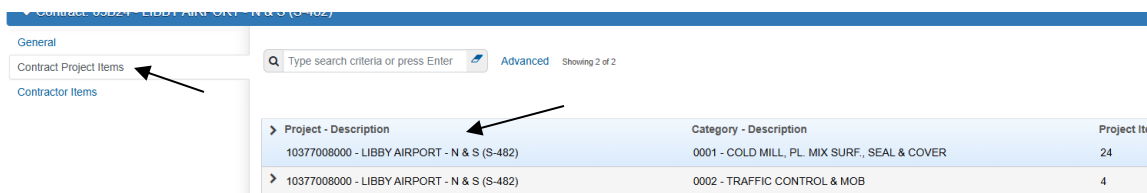
Most bid items will have a material set, or multiple material sets, that require materials for those items. These are requirements that are set forth within the Materials Manual and the Materials Manual 601 section.

There will be items that materials may not be required, a change in material on an existing material set (like rebar or cement) or there can be items that will require the user to create the material set. Miscellaneous Work is a common one that the user will need to create the material set. Only the **FOP & EPM** roles can create a material set, it is important that the user verifies the material requirement in the Materials Manual 601 section

Create a New Material Set

The user will have to create a new material set for items that are needed for Project Specific, Change Order Items or material change to an existing bid item material set.

1. Navigate to the contract from Contract Administration
2. Click on the **Contract Materials and Acceptance Actions** quick-link
3. Select the **Items** quick link in the upper middle of the screen
4. Select the **Contract Project Items** tab on the left side of the screen
5. Click on the **appropriate project / category to expand the grouping**



6. Enter a **short name for this material set**
 - a. Example: Dig out at 15+00 RT, Luminaire replacement, agreed price #2
7. **Save**
8. **The user will be redirected back to the Materials Tab**
9. Search for the **new material set** with the search box
 - a. This will allow the user to search for the specific material set without looking through the list

Contract - 1233046003 - SALMON LAKE

Materials

Acceptance Actions

Mix Designs

Contractor Material Sources

Contractor Material Log

Search: Trash

System Default

Showing 1 of 1

Item Source: No Filter

Project	Description	Catg	Item	Description	Ln#	Matl Set to Dt	Material Set
1233046003	SALMON LAKE	0001	104030010	MISCELLANEOUS WORK	0030	4,272,000	Trash Guard - Agreed price

10. Expand the Material set

- Click on the carrot on the left side of the material set row

11. Fill out all the required information

- Include comments documenting the change
 - Example: Change order #2, AR account 1234, Force Account 10 ect.
 - This allows anyone that is verifying materials to know where they can look at to make sure all testing/certifications are accounted for

12. If the user needs to add more material codes to the material set, **select the blue row action arrow** and select the **Add Material** link

- Example: If the material set is for Concrete, the user will need to make sure to add in the cement, fly ash (if applicable), concrete admixtures, the classification of concrete, aggregate(s), water, rebar & seal material
- This all can be added to 1 material set vs creating multiple material sets for each item

13. Save

Contract - 1233046003 - SALMON LAKE

Materials

Acceptance Actions

Mix Designs

Contractor Material Sources

Contractor Material Log

Search: Trash

System Default

Showing 1 of 1

Item Source: No Filter

Project	Description	Catg	Item	Description	Ln#	Matl Set to Dt	Material Set	Not Using	Mtrls
1233046003	SALMON LAKE	0001	104030010	MISCELLANEOUS WORK	0030	4,272,000	Trash Guard - Agreed		

Actions

- Exclude from Search Results
- Tasks
- Add Material**
- Copy Material Set...
- Delete
- Views
- Attachments (0)
- Links
- Tracked Issues

Add a Material code to an existing Bid Item Material set

If a material is being used in lieu of a material code within an existing material set, the user can add the material code to instead of creating a new material set for just that material code. **Example: Rebar changes. The contractor may elect to use a GR60 instead of a GR40 that is called out in the material set. The user can add the GR 60 material code to the appropriate bid item material set since it is reflective to that material set.**

- Navigate to the contract from Contract Administration
- Click on the **Contract Materials and Acceptance Actions** quick-link
- Using the search box, **enter the name of the item**
 - When working with the materials/acceptance actions, the search box will make it easier for the user to navigate through the items and not have to search the entire list
- Click on the blue drop arrow on the right side of the material set row**
- Select **Add Material**

- a. This will expand the material set and create a blank material data field
6. Enter in the **material name or the material code in the Material Field**
7. The user can enter in a source, but this is not a requirement
8. **Enter in the appropriate conversion factor**
 - a. For materials that are certifications/QPL, use a conversion factor of 1.0 as these are normally 1 per contract
 - b. If the item uses a rate, the conversion factor of 0.001 may be used. If this conversion factor is used, **it is up to the user to make sure that samples are obtained correctly as noted in the Materials Manual 601 section**
9. **Enter any appropriate comments in the comments field**
 - a. Comments should note why a material was added to the material set
 - i. Examples could be:
 1. Per Change order #
 2. Per agreement between the contractor and the EPM, material was used in Lieu of (material)
 3. Per mix design 123456, material was used instead of this material (Cement is a common change)
10. Select the **Save button** on the blue component ribbon

0 changed

Project	Description	Catg	Item	Description	Ln#	Matl Se...	Material Set	Not Usin...	Mt...
978212800	I-15 BR REHAB - JEFF	0001	104030010	MISCELLANEOUS WORK	0010	3,675.000	Jeff City Guardrail Repair	☐	4
978212800	I-15 BR REHAB - JEFF	0001	104030010	MISCELLANEOUS WORK	0010	541.000			
978212800	I-15 BR REHAB - JEFF	0001	108000010	STRUCTURE ANALYSIS	0020	1.000			

Actions

Exclude from Search Results

Tasks

Add Material

Copy Material Set...

Copy an Existing Material Set

The user can copy an existing material set from one bid item to another bid item that is using the same material. The user needs to use **EXTREME** caution when doing this. Since this makes a copy of the material set, including conversion factors, the user will need to verify that this information from the material set is correct. The user will also need to verify that they select the correct bid item that the copy will be applied to. If the user selects the incorrect bid item or Material set, they will need to reach out to the AASHTOWare Help desk. The user will need to keep in mind, corrections cannot be corrected if they are locked on a DWR (estimate) or sample record. The user will need to use caution when corrections are needed.

1. Navigate to the **contract from Contract Administration**
2. Click on the **Contract Materials and Acceptance Actions** quick-link
3. Navigate to a bid item that has the material set the user is looking for

4. Click on the blue row action arrow
5. Click on the Copy Material Set option

Project	Description	Catg	Item	Description	Ln#	Matl Set to Dt	Material Set ▼	Not Using ▼	Mtrls
1233046003	SALMON LAKE	0001	551020030	CONCRETE-CLASS GENERAL	0340	0.000	General-Uses Convent		
1233046003	SALMON LAKE	0001	551020030	CONCRETE-CLASS GENERAL	0340	14.500	General-Uses Optimiz		
1233046003	SALMON LAKE	0001	605000070	REMOVE CONCRETE BARRIER RAIL	0440	128.000	No Materials Required		
1233046003	SALMON LAKE	0001	605000080	TALL CONCRETE BARRIER RAIL	0450	0.000	Deck-Uses Conventio		

6. The user can change the Name of the Material set in the New Material Set Name field
 - a. If the name is changed, it is important that the user names it to something that others know what it is for
7. Select the **correct bid item** the material set needs to be applied to
8. Users can type in the **Proj Ln Num** of the bid item in the search box
9. Click on the Add to Contract Project Item button

New Material Set Name *

General-Uses Conventional

Q 0450

Select: All None

System Default Showing 1 of 1

Project	Item	Description	Proj Ln Num
1233046003	605000080	TALL CONCRETE BARRIER RAIL	0450

Add to Contract Project Item

10. The user should navigate to the material code that was added and add a brief, but specific comment to why the change was made in the Comments field

Project Specific Material Sets

Project Specific - Add Materials sets are used as place holders on a specific bid item only. **Project Specific – Add Materials should NEVER** be used on a posting and if the user comes across an item that has this material set, the user should notify the EPM or FOP that a material set will be needed before that item has a posted quantity.

At the time of the contract materials generation, it is unknown if materials will be needed for that specific item. It is up to the user to verify if materials are needed and will be incorporated into the contract or not needed. Miscellaneous work is a common one that will show Project Specific - Add Materials. The user needs to verify in the Materials Manual 601 for the required acceptance methods.

The user will no longer be able to rename Project Specific Material sets and will need to follow the steps to create a new material set.

No Materials Required

Some bid items may not have a specific type of material set and may not have materials associated. The user will need to create a new material set with the name of **No Materials Required**. The user does not need to add any material codes.