Material Sets: Creating, Adding Material Codes, Copy an existing Material set and Project Specific

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.

Creating a New Material Set and Adding Material codes to an Existing Material set

Creating a New Material Set to a Bid item

- Navigate to the **Contract Materials and Acceptance Actions** screen
- Select the **Items** quick link in the upper middle of the screen
- Select the **Contract Project Items tab** on the left side of the screen
- Click on the **appropriate project / category to expand the grouping**

- Click on the **Row Action menu of the desired item row and select Create Material Set**

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

Updated 04/2/25

- **Expand the Material set**
    - Click on the carrot on the left side of the material set row
- **Fill out all the required information**
    - Include any comments as appropriate
- **To add more than 1 material code to the material set, select the Add Material blue row action menu on the right side of the material set.**
    - Example: If the material set if 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 for each item

- **Save**

Adding a new material code to an existing 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. The contractor may elect to use a GR60 instead of a GR40 that is called out in the material set. The user can add in the GR 60 material code to the appropriate material set.

- Navigate to **Contract Progress or Contract Administration**
- **Use the search box to find the contract**
    - The user can also place their cursor in the search box and hit enter for the list of associated contracts
- Click on the **contract number**
- Click on the **Contract Materials and Acceptance Actions quick-link**
    - This will be located in the upper middle of the screen
- 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

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- **Click on the blue drop arrow on the right side of the material set row**
- Select **Add Material**
    - This will expand the material set and create a blank material data field
- Enter in the **material name or the material code in the Material Field**
- The user can enter in a source, but this is not a requirement
- **Enter in the appropriate conversion factor**
    - For materials that are certifications/QPL, use a conversion factor of 1.0 as these are normally 1 per contract
    - 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**
- **Enter any appropriate comments in the comments field**
    - Comments should note why a material was added to the material set
        - Examples could be:
            - Per Change order #
            - Per agreement between the contractor and the EPM, material was used in Lieu of (material)
            - Per mix design 123456, material was used instead of this material (Cement is a common change)
- Select the **Save button** on the blue component ribbon
- Follow the above steps for any other material codes that need to be added to the existing material set

Note: Only the FOP & EPM roles can create or add a material set. Once a material code has been added, an Inspector/FOP/EPM will be able to use it. However if there is a current posting with the updated material set in it already, the new updated material codes will not show. The posting will need to be deleted out and re-added back in to update the materials acceptance actions. A user can also create another posting sequence and the updated material set will show the acceptance action tab. The user will only need to complete the action for the appropriate material code on the material set. If a material code is being used instead of an existing one, then the test acceptance actions will need to be zeroed out with comments as to why there was a change in the Acceptance Tab in the Contract Materials and Acceptance Actions screen by the FOP/EPM.

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 or Lori Amestoy/Jenn Sowieja to help fix.

- In the Materials tab, navigate to the bid item that has the appropriate material set in it
- Click on the blue row action arrow
- Select the Copy Material set

- The user can change the Name of the Material set in the New Material Set Name field
  - If the name is changed, it is important that the user names it to something that others know what it is for
- Select the correct bid item the material set needs to be applied to
  - Users can type in the Proj Ln Num of the bid item in the search box

- Click on the Add to Contract Project Item button

Note: If a copied material set is completed, it is recommended that the user navigates to the created material on the new item and adds a comment to on one of the material set rows. This helps explain why there was a change to the bid item material sets.

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Project Specific Material Sets
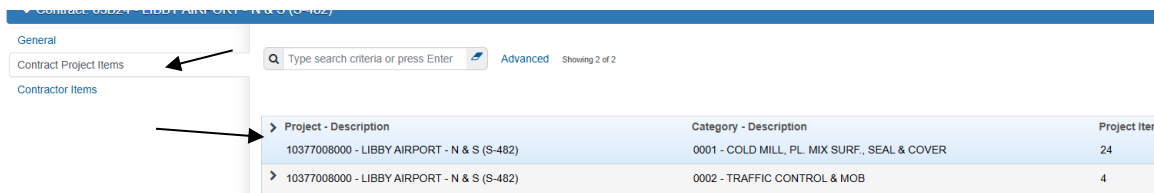
**Project Specific - Add Materials sets are used as place holders on a specific bid item only.
Project Specific – Add Materials should _NEVER_ be used on a posting and if the user comes
across an item that has this material set, the user should notify the EPM or FOP that a
material set will be needed before that item has a posted quantity.**

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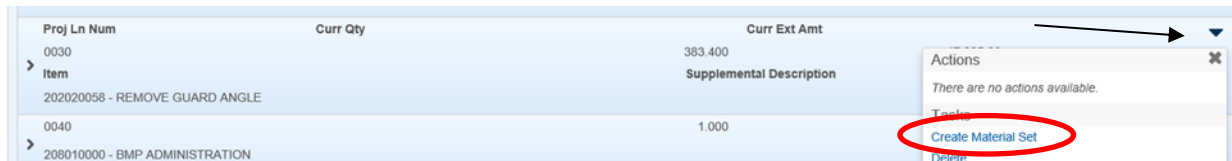The user needs to verify in the Materials Manual 601 for the required acceptance methods.

Currently, material set names can be edited. However, it was noticed that this was causing
issues within the system and affecting multiple aspects of the system. As of 04/07/2025,
material set names will not be an editable field. Users will see **Project Specific** in the field name
instead of **Project Specific – Add Materials** in the future.

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- **Save**

Create a No Materials Required Material Set

If an existing material set is a project Specific and no materials are needed for that bid item (BMP -Administration for example), the user will need to follow the steps to add a new material set and give the material the name of No Materials Required. Once the user has saved the new material set, no further action will be needed for that specific material set.

Note: If the user needs **any** assistance, including editing, deleting, fixing existing material sets ect, please reach out to Lori Amestoy or Jenn Sowieja. The user can also send an email to MDT AASHTOWare Help Desk mdtaashtowarehelpdesk@mt.gov

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