



NDOR SiteManager Materials Management

SiteManager Materials & Research
Administrator Instructions

Zero Out Contract Requirements

Table of Contents

1. Purpose:	4
1.1 Roles and Responsibilities:	4
1.2 Authentication:.....	4
1.3 Abbreviations:.....	4
2. Operational Instructions:	5
2.1 Generate Contract Materials and Outstanding Item List Report:.....	5
2.1.1 Main Panel:	5
2.2 Materials Management:.....	5
2.3 Contract Sampling and Testing:.....	6
2.3.1 Select Contract/Materials Information:	6
2.4 Contract Sample and Testing Requirements:	8
2.5 Select Next Project/Line Item or Next Material	9
2.6 Review the Sampling Checklist:.....	10
2.7 Report and Utility Generator (RUG):.....	13

Illustrations

Figure 1, Main Panel.....	5
Figure 2, Materials Management (+).....	6
Figure 3, Contract Materials (+).....	6
Figure 4, Contract/Material Information.....	7
Figure 5, Contract/Material Information.....	7
Figure 6, Contract/Material Information.....	8
Figure 7, Sample and Testing.....	8
Figure 8, Sample and Testing.....	9
Figure 9, Sample and Testing.....	9
Figure 10, Open Icon	10
Figure 11, Contract/Material Informatin.....	10
Figure 12, Materials Management (+)Sample and Testing.....	10
Figure 13, Materials Management – Process List.....	11
Figure 14, Process List	11
Figure 15, Services Menu	11
Figure 16, Confirm Process Submission	12
Figure 17, Client Job Monitor.....	12
Figure 18, DPS Status Monitor.....	12
Figure 19, Example – Sampling Check List.....	13
Figure 20, RUG Home Page	13
Figure 21, Utilities Menu.....	14
Figure 22, Materials and Research Menu.....	14
Figure 23, Contract Sampling and Testing Criteria	14
Figure 24, Contract Sampling and Testing Criteria	15
Figure 25, Contract Sampling and Testing Criteria	15
Figure 26, Contract Sampling and Testing Requirements.....	16
Figure 27, Contract Sampling and Testing Requirements.....	16
Figure 28, Contract Sampling and Testing Requirements.....	16
Figure 29, Example – Sampling Check List.....	17

Modification Tracking Summary

Summary of Changes	Date	Author
Instruction document created	8/12/2011	Andi Clark
Updated Roles & Responsibilities	5/23/2012	Andi Clark
Updated reference to Generate a Sampling Checklist	1/31/2013	Andi Clark

1. Purpose:

This document is intended to be used in conjunction with the existing training materials provided by the NDOR (Nebraska Department of Roads), M&R (Materials & Research) Division. Questions concerning initialization of the SMGR (SiteManager) application are addressed in this existing training material.

The purpose of this document is to guide the user through the steps to zero out unnecessary contract material requirements in SMGR.

1.1 Roles and Responsibilities:

SiteManager Staff: 402.479.4760, DOR.SiteManagerMaterials@nebraska.gov.

1.2 Authentication:

Generate a Sampling Checklist: http://www.nebraskatransportation.org/mat-n-tests/pdfs-docs/Materials_Management_Guidance/Reporting/Generate-a-Sampling-Checklist2112013.pdf

1.3 Abbreviations:

ID: Identification Number
M&R: NDOR Materials & Research
NDOR: Nebraska Department of Roads
SCL: SMGR Sampling Checklist
SMGR: SiteManager

2. Operational Instructions:

These instructions will provide the steps necessary to assist SMGR M&R administrators when the specified contract requirements should be zero'd out.

2.1 Generate Contract Materials and Outstanding Item List Report:

2.1.1 Main Panel:

After successfully completing the log in process, SMGR will present the Main Panel. From the Main Panel, select Materials Management(+).

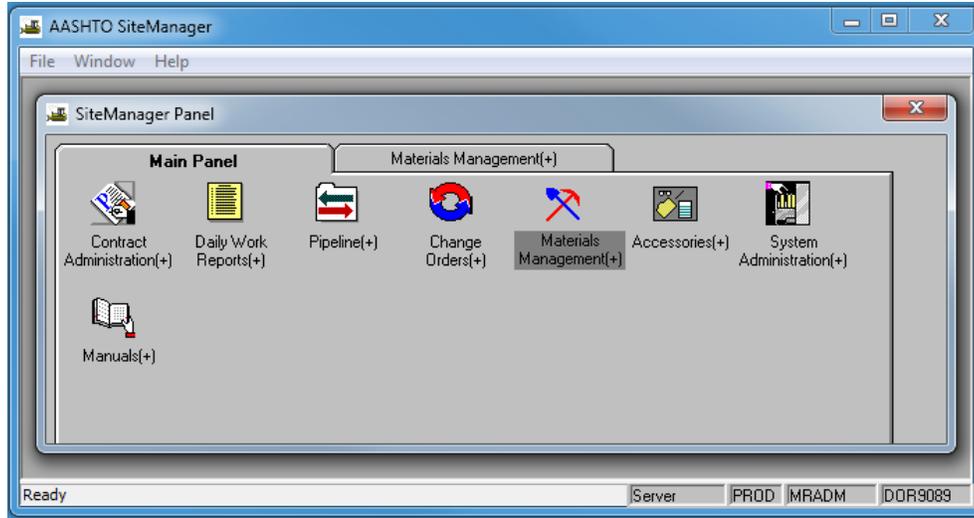


Figure 1, Main Panel

NOTE: The icons represented in these illustrations may differ based on the user's security group.

2.2 Materials Management:

Select Contract Materials(+). Icon.

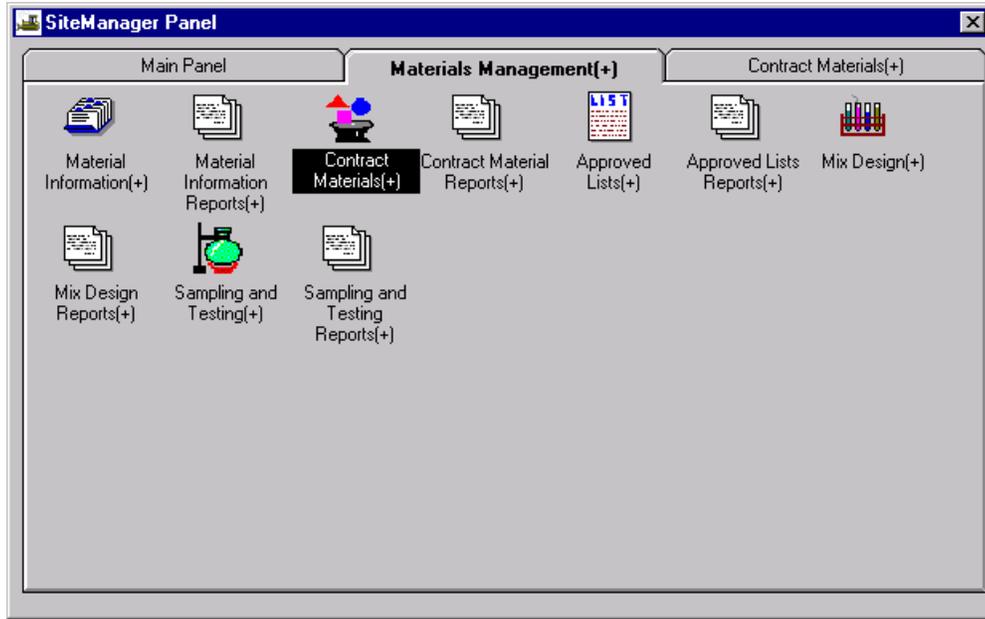


Figure 2, Materials Management (+)

2.3 Contract Sampling and Testing:

Select Contract Sampling and Testing.

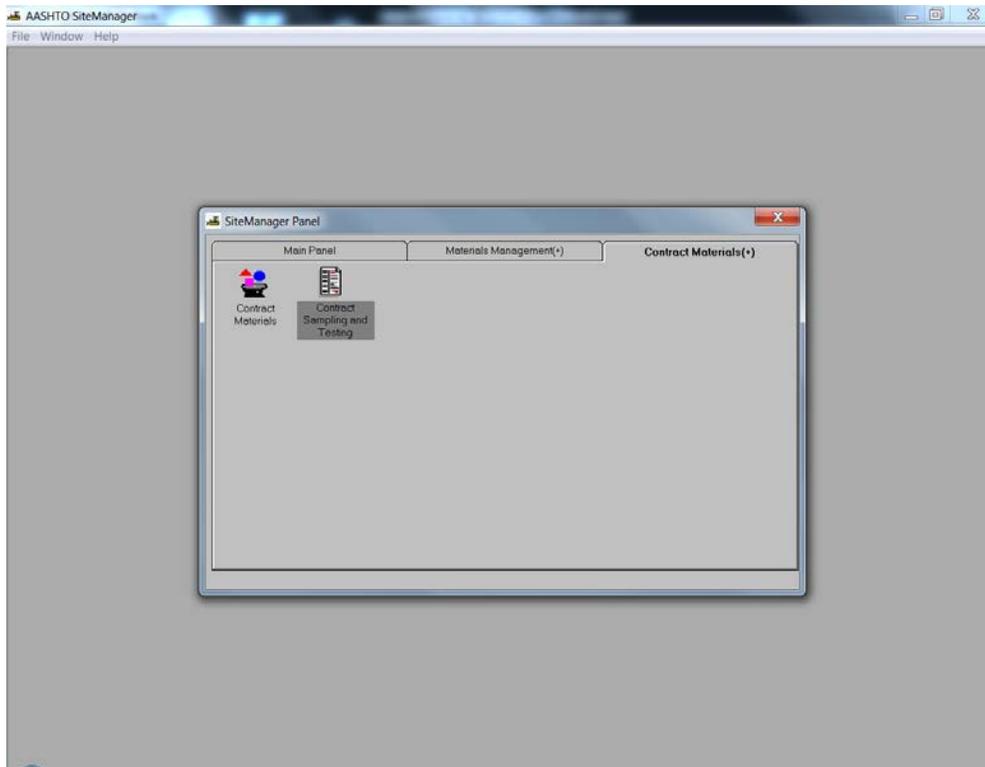


Figure 3, Contract Materials (+)

2.3.1 Select Contract/Materials Information:

Select the desired Contract ID and Description from the list by highlighting the appropriate row and double click.

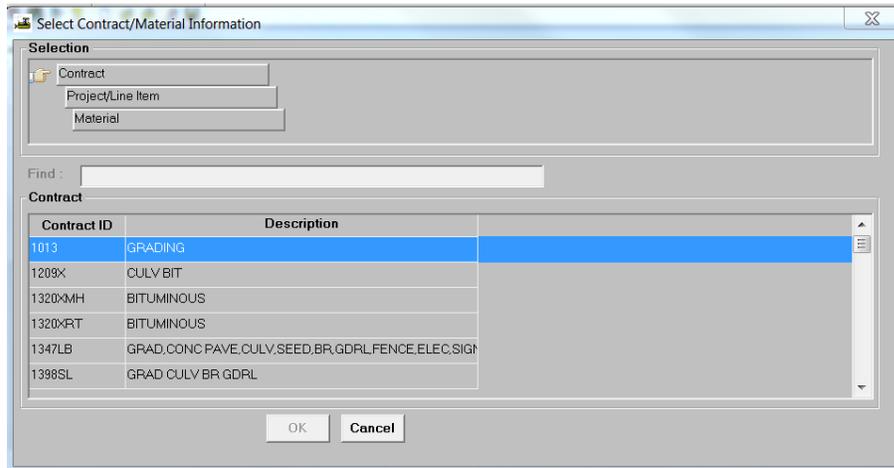


Figure 4, Contract/Material Information

Select the Project/Line Item from the list by highlighting the appropriate row and double click.

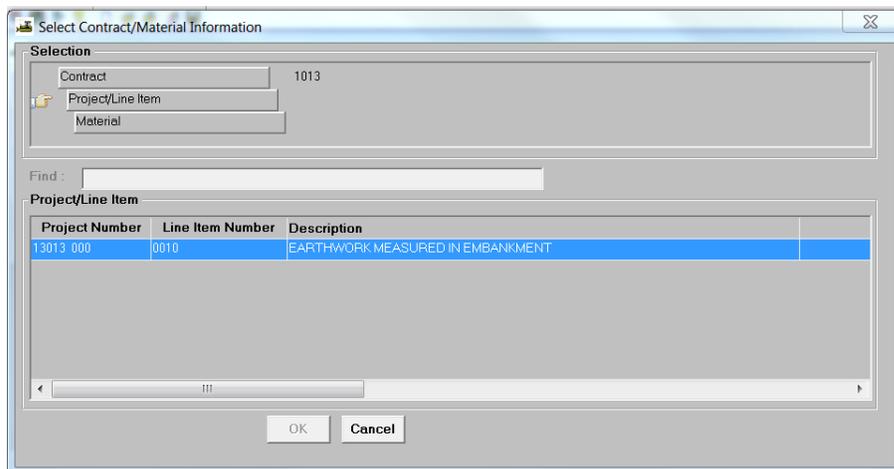


Figure 5, Contract/Material Information

Select the Material from the list by highlighting the appropriate row and click OK.

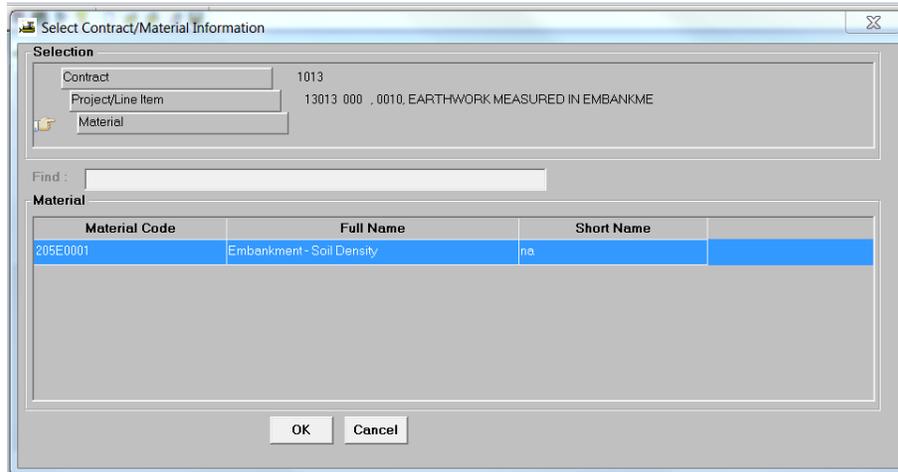


Figure 6, Contract/Material Information

2.4 Contract Sample and Testing Requirements:

The Contract Sample and Testing requirements folder will be presented. Select the Sample and Testing tab.

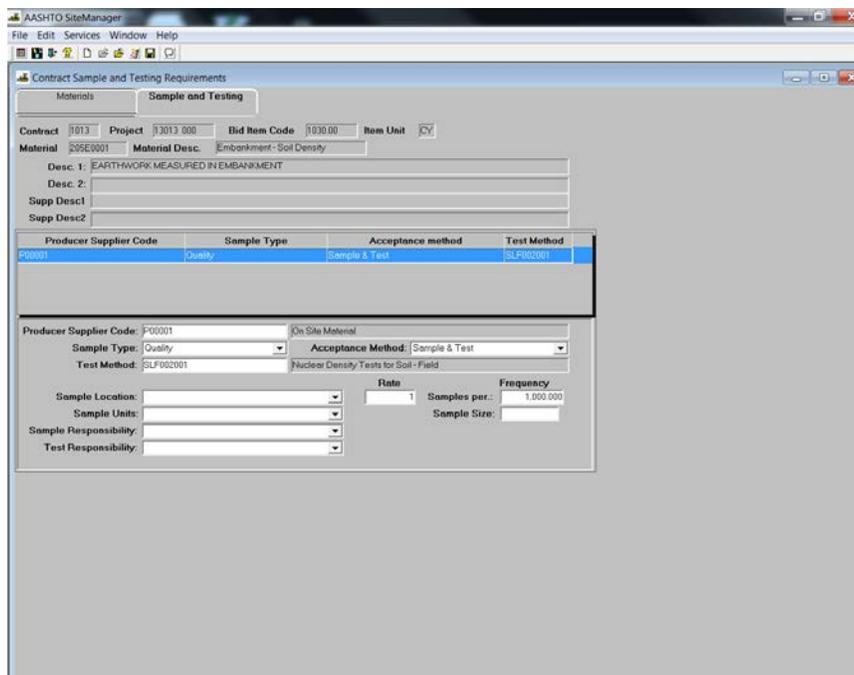


Figure 7, Sample and Testing

From the upper grid, select the record that will be zero'd out.

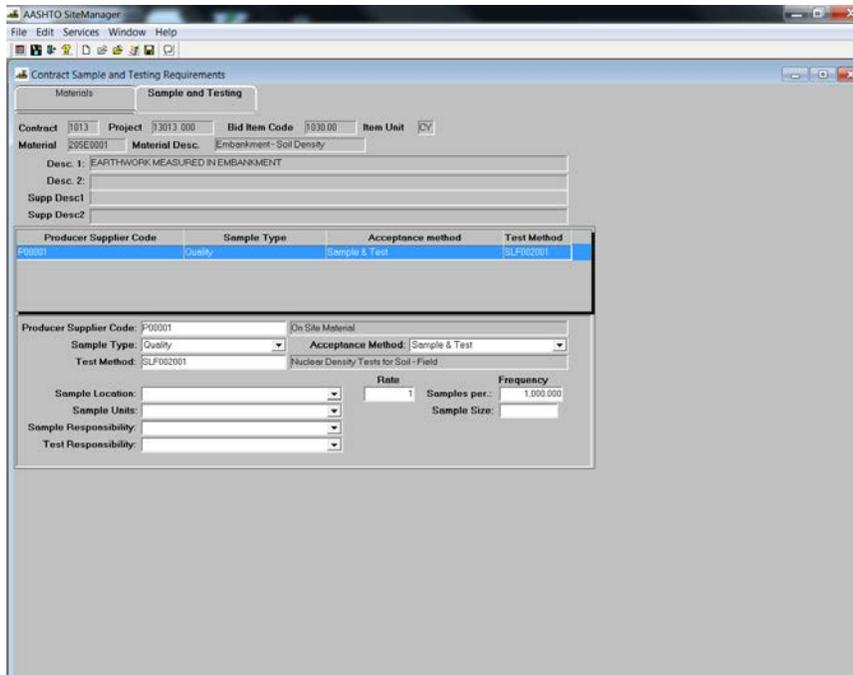


Figure 8, Sample and Testing

Set the Rate value to '0' (zero).

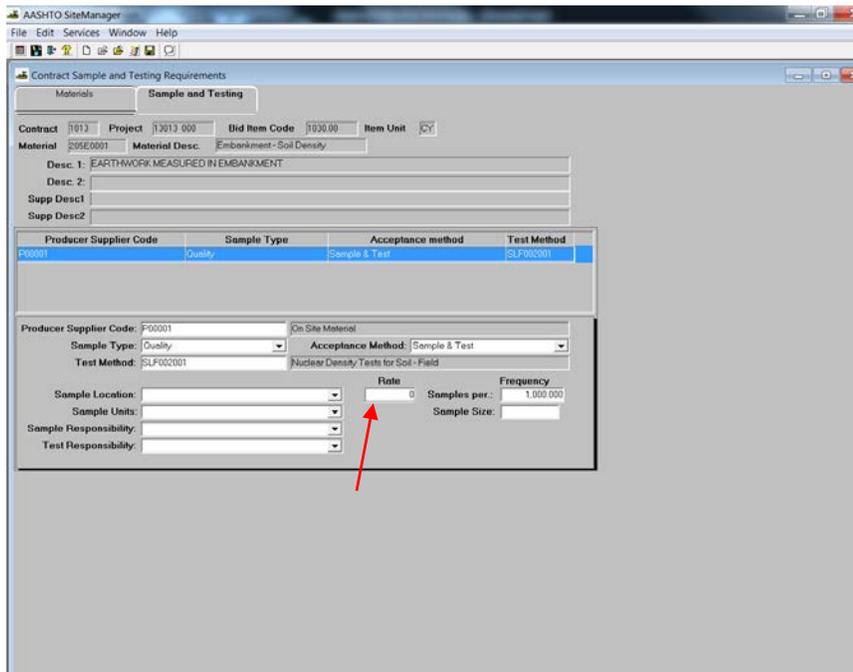


Figure 9, Sample and Testing

Press Save, , to store the data.

2.5 Select Next Project/Line Item or Next Material

When more than one Project/Line Item or Material requires review and/or action, return to Select Contract/Material Information frame. From the Contract Sample and Testing Requirements window, select the Materials tab.

From the button bar, select Open.



Figure 10, Open Icon

The Select Contract/Material Information window will open. Click on the Selection, ie, Project/Line Item or Material as necessary.

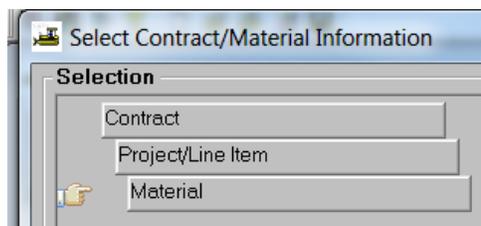


Figure 11, Contract/Material Information

Select the Project/Line Item, double click, and then the Material from the list by highlighting the appropriate row and click OK.

Repeat these steps until all of the updates are completed.

2.6 Review the Sampling Checklist:

To review the updated version of the Sampling checklist, follow these steps.

From the Main Panel, select Materials Management(+).

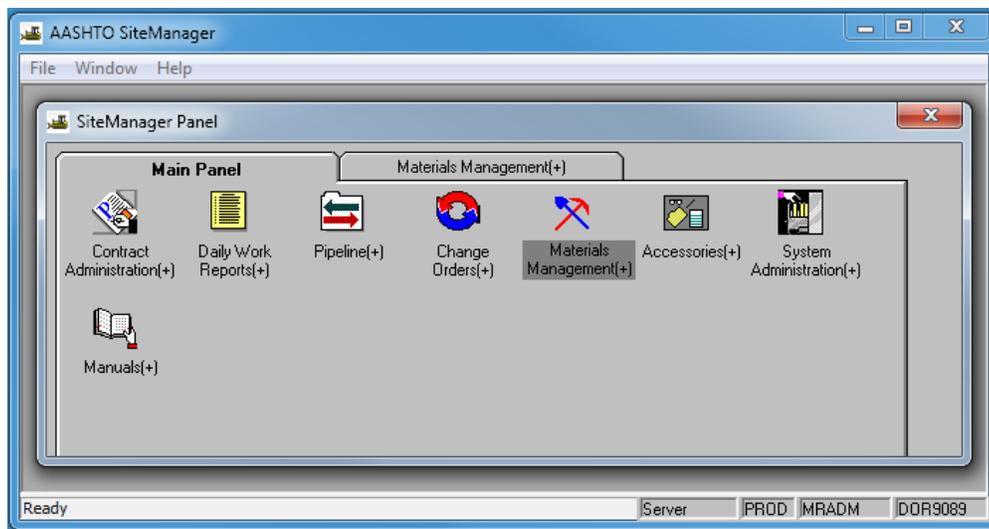


Figure 12, Materials Management (+) Sample and Testing

From the Material Management(+) tab, select Process List.

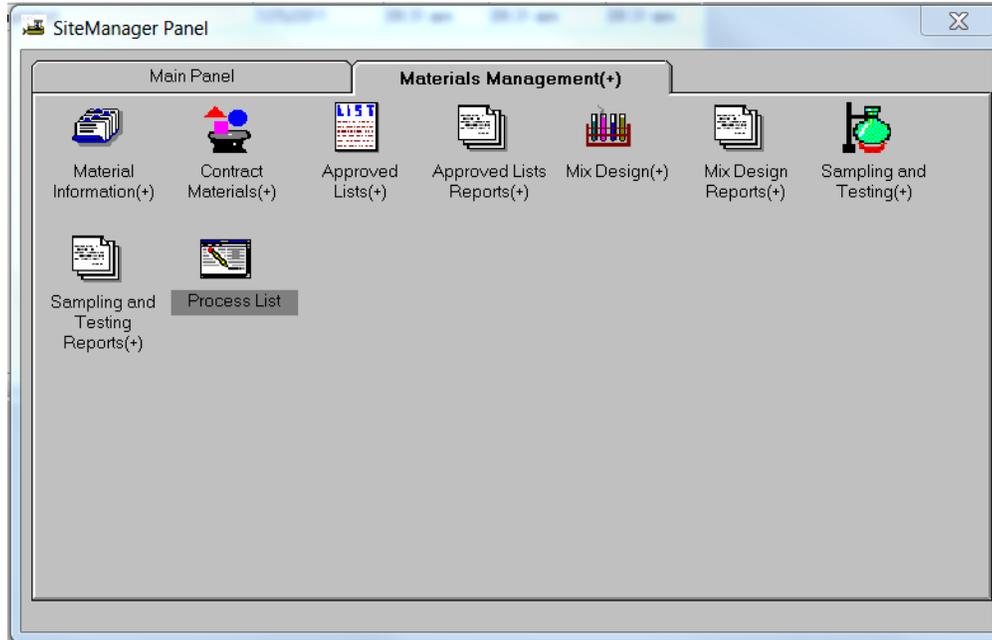


Figure 13, Materials Management – Process List

From the Process List, select the Sampling Checklist.

Process ID	Process Type	Process Description
RMMSMPCL	SM-Standard	Sampling Checklist
MSX00006	Custom	Sampling Checklist w/ Sample ID Numbers
AGL00021	Custom	Agg: Contract Summary-Central Lab-C33 Fine Sand
AGL00024	Custom	Agg: Contract Summary-Central Lab-Chip Seal Aggregate
AGL00003	Custom	Agg: Contract Summary-Central Lab-Class A (Silica Fume Fine)
AGL00005	Custom	Agg: Contract Summary-Central Lab-Class B (47B Fine)
AGL00009	Custom	Agg: Contract Summary-Central Lab-Class C (AX)
AGL00023	Custom	Agg: Contract Summary-Central Lab-Class C (BX)
AGL00011	Custom	Agg: Contract Summary-Central Lab-Class E (47B Coarse)
AGL00020	Custom	Agg: Contract Summary-Central Lab-Class F (Silica Fume)
AGL00029	Custom	Agg: Contract Summary-Central Lab-Coarse Agg Pre-cast/stress
AGL00014	Custom	Agg: Contract Summary-Central Lab-Crushed Rock/Surfacing
AGL00033	Custom	Agg: Contract Summary-Central Lab-Fine Agg Pre-cast/stress
AGL00034	Custom	Agg: Contract Summary-Central Lab-Granular Backfill
AGL00027	Custom	Agg: Contract Summary-Central Lab-Gravel for Surfacing
AGL00031	Custom	Agg: Contract Summary-Central Lab-Gravel for Surfacing, X
AGL00001	Custom	Agg: Contract Summary-Central Lab-Mineral Agg/Armor Coat
AGL00016	Custom	Agg: Contract Summary-Central Lab-Mineral Agg/Microsurfacing
AGX00021	Custom	Agg: Contract Summary-Correlation-C33 Fine Sand

Figure 14, Process List

From the Services Menu, select Run Process

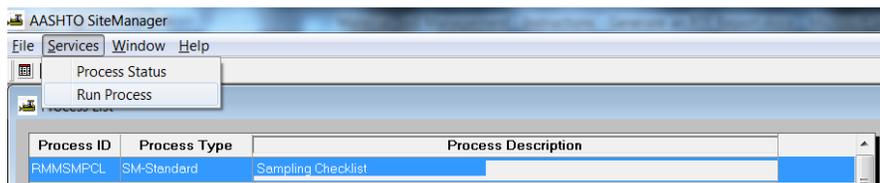


Figure 15, Services Menu

From the Confirm Process Submission window, select the appropriate Contract ID and click the Submit button.

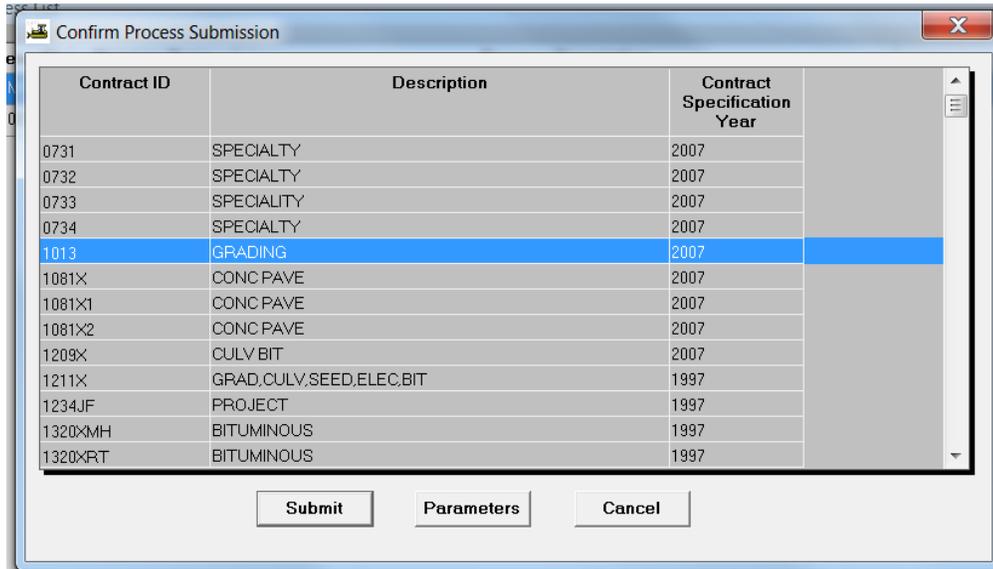


Figure 16, Confirm Process Submission

SMGR will present the following dialog boxes.

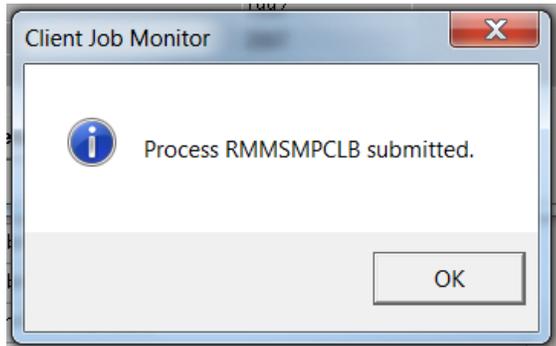


Figure 17, Client Job Monitor

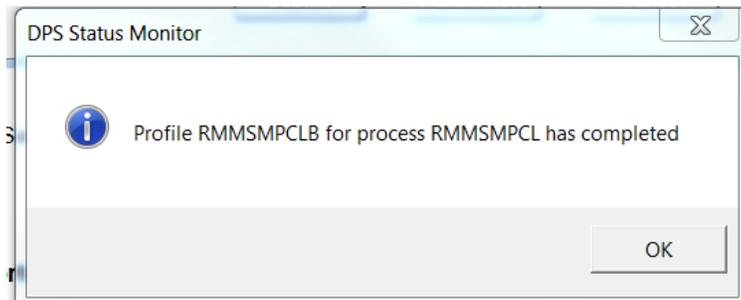


Figure 18, DPS Status Monitor

Click OK on both of them.

The Sampling Checklist will open automatically into your default Internet browser. All of the Internet Explorer features such as print, email, and save are available.

Rpt-ID: RMMSPCL Revision: 03222006 Tst Meth: N/A		State of Nebraska Department of Roads				Rpt Date: August 12, 2011				
		Sampling Checklist				Materials & Research 1400 Hwy 2 Lincoln, NE 68502				
Contract ID: 1013 Location: CERESCO SOUTH WETLAND BANK RESTORATION Type of Work: MISCELLANEOUS Vendor ID: 1783		Federal/State Project: MISC-77-2(1071)		County: LANCASTER Vendor Name: VALLEY CORPORATION		Route: 077				
Project	Line Item	Item Code	Item Description	Unit	Bid + CO Qty	Qty Reported To Date	Qty Authorized To Date	Installed Qty		
Material										
Producer / Supplier										
						Test Type	Cur Req	Tot Tkn	Tot Cmp	
13013 000	0010	1030.00	EARTHWORK MEASURED IN EMBANKMENT	CY	329.000	0.000	0.000	0.000	0.000	
205E0001 - Embankment - Soil Density P00001 - On Site Material										
						SLF002001	0	11	0	0

Figure 19, Example – Sampling Check List

Review the Sampling Checklist to ensure the items zero'd out no longer appear.

For more information, see [Generate a Sampling Checklist](#).

2.7 Report and Utility Generator (RUG):

An alternative method to zero out un-needed contract materials requirements has been established using the Report and Utility Generator (RUG).

Open RUG to the home page.

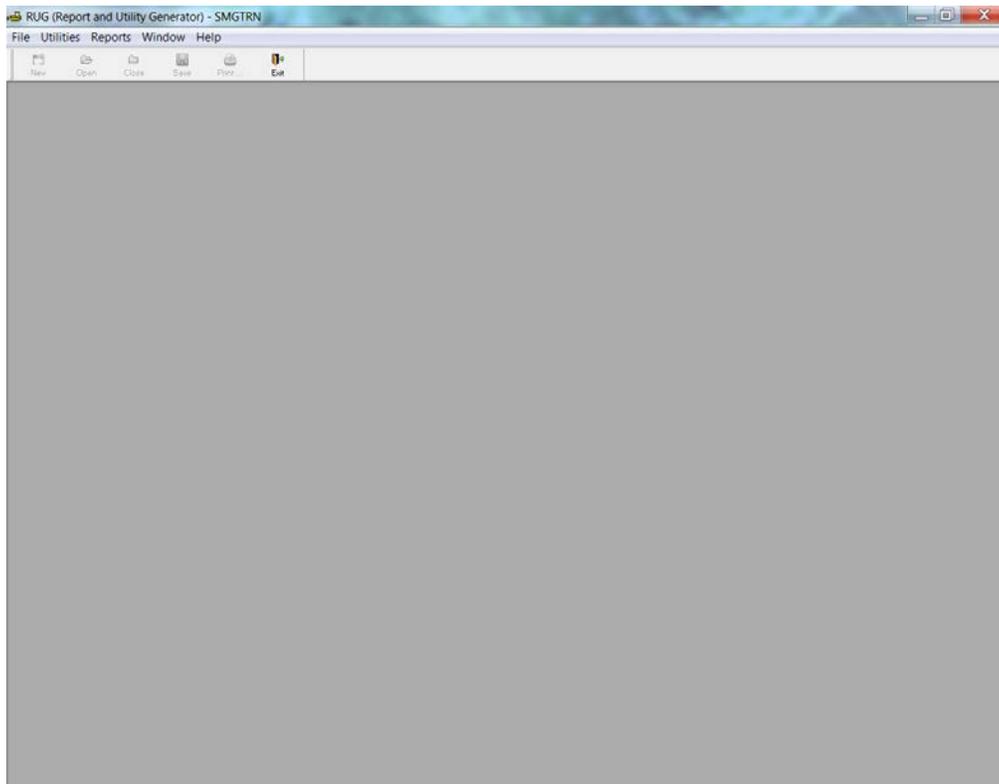


Figure 20, RUG Home Page

From the RUG home page, select the Utilities menu.

From the Utilities menu, select Material and Research.



Figure 21, Utilities Menu

From the Materials and Research foldover menu, select Contract Sampling and Testing Requirements – zero out.

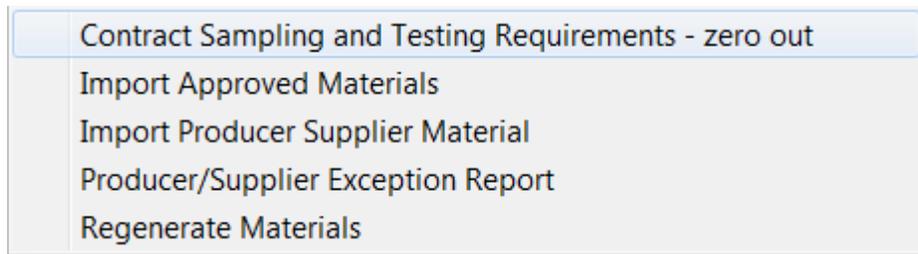


Figure 22, Materials and Research Menu

The Choose Contract Sampling and Testing criteria frame will open.

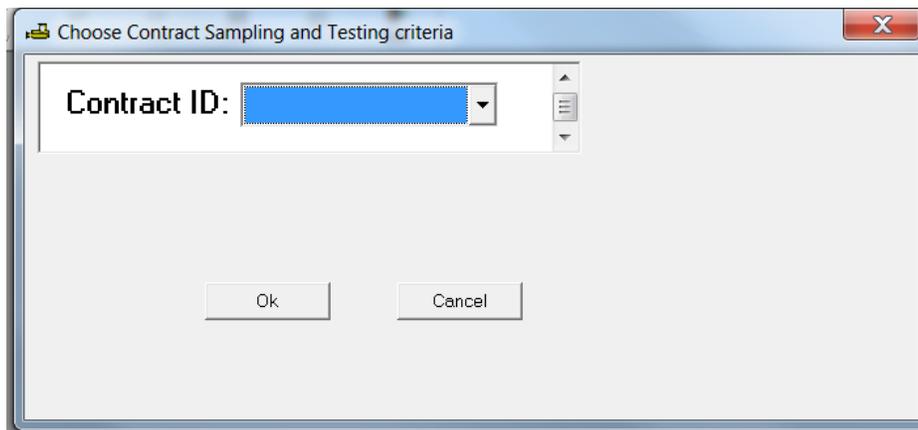


Figure 23, Contract Sampling and Testing Criteria

Using the drop down menu, select the desired Contract ID and click OK.

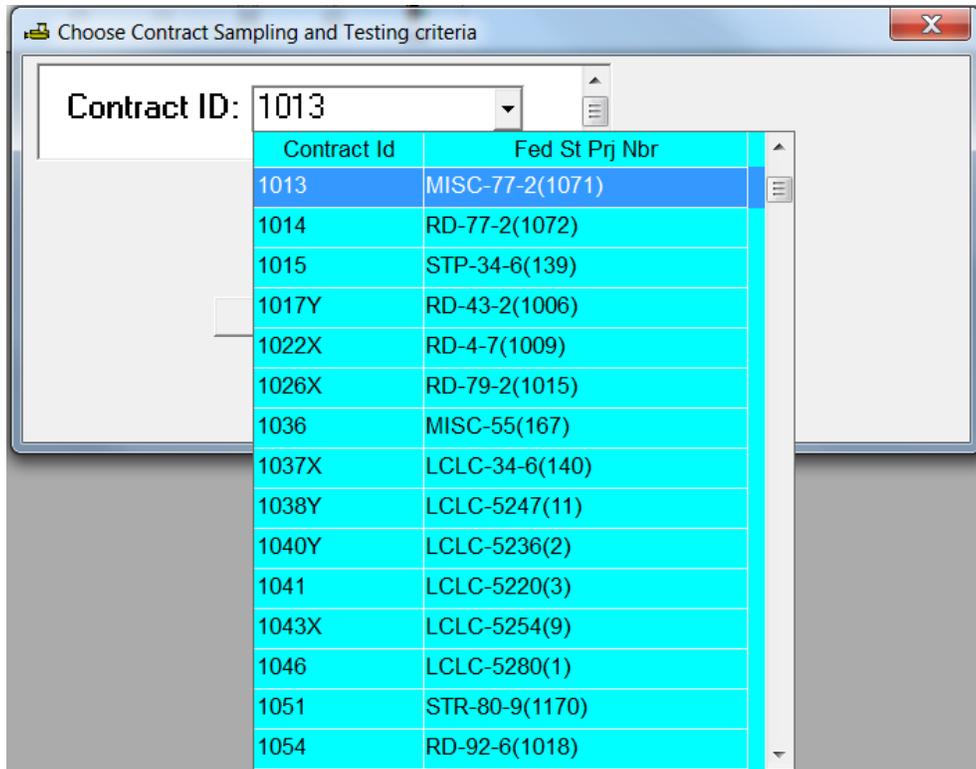


Figure 24, Contract Sampling and Testing Criteria

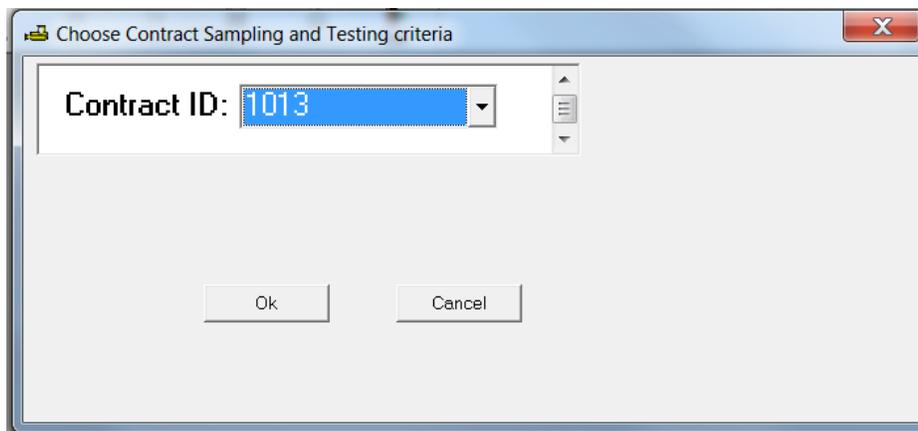


Figure 25, Contract Sampling and Testing Criteria

Contract Sample and Testing Requirements will open and present a grid. This grid will identify the material sampling and testing requirements that have not been satisfied.

Identify the targeted material sampling and testing requirement(s).

Contract Sample and Testing Requirements

The criteria to show pay items on this utility:

1) Pay item is not included on a sample.

2) Sample Frequency Rate is not currently zero.

Right click on rows below to sort the list differently.

Cont Id	Prj Nbr	Ln Item Number	Test Method	Material Code	Prodr Supp Code	Acceptance Method	Sample Type	F
1013	13013 000	0019	MSF001001	809TSF		APL	VISU	1

Figure 26, Contract Sampling and Testing Requirements

Update the Frequency Rate from 1 to 0 (zero).

Contract Sample and Testing Requirements

The criteria to show pay items on this utility:

1) Pay item is not included on a sample.

2) Sample Frequency Rate is not currently zero.

Right click on rows below to sort the list differently.

Item mber	Test Method	Material Code	Prodr Supp Code	Acceptance Method	Sample Type	Frequency Rate	Sample Frequency
3	MSF001001	809TSF		APL	VISU	1	1,000,000.000

Figure 27, Contract Sampling and Testing Requirements

Contract Sample and Testing Requirements

The criteria to show pay items on this utility:

1) Pay item is not included on a sample.

2) Sample Frequency Rate is not currently zero.

Right click on rows below to sort the list differently.

Item mber	Test Method	Material Code	Prodr Supp Code	Acceptance Method	Sample Type	Frequency Rate	Sample Frequency
3	MSF001001	809TSF		APL	VISU	0	1,000,000.000

Figure 28, Contract Sampling and Testing Requirements

From the Menu bar, select Save, .

As noted in Section 2.6 of these instructions, review the Sampling Checklist in SMGR to ensure the items zero'd out no longer appear.

NDOR SiteManager Materials Management
SiteManager Materials & Research Administrator Instructions – Zero Out Contract Requirements

Rpt-ID: RMMSMPCL Revision: 03222006 Tst Meth: N/A	State of Nebraska Department of Roads	Rpt Date: August 12, 2011								
	Sampling Checklist	Materials & Research 1400 Hwy 2 Lincoln, NE 68502								
Contract ID: 1013 Location: CERESCO SOUTH WETLAND BANK RESTORATION Type of Work: MISCELLANEOUS Vendor ID: 1783	Federal/State Project: MISC-77-2(1071) County: LANCASTER Vendor Name: VALLEY CORPORATION	Route: 077								
Material										
Producer / Supplier										
		Test Type Cur Req Tot Tkn Tot Cmp Tot Req Tot Rem								
13013 000	0010 1030.00	EARTHWORK MEASURED IN EMBANKMENT	CY	329.000	0.000	0.000	0.000	0.000		
205E0001 - Embankment - Soil Density P00001 - On Site Material										
					SLF002001	0	11	0	0	0

Figure 29, Example – Sampling Check List