



NDOR SiteManager Materials Management

Laboratory and Field Personnel
Instructions

Generate a Sampling Checklist

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Modification Tracking Summary

| Summary of Changes | Date | Author |
|--------------------------------|-------------|---------------|
| Instructional Document Created | 2/11/2013 | Andi Clark |
| | | |

1. Purpose:

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

The purpose of this instructional document is to provide the steps necessary to successfully generate a Sampling Checklist (SCL) in SMGR.

1.1 Roles and Responsibilities:

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

1.2 Authentication:

Assessing SiteManager Material Discrepancies: http://www.nebraskatransportation.org/mat-n-tests/pdfs-docs/Materials_Management_Guidance/General/SiteManager_Material_Discrepancies.pdf

Creating and Authorizing a SiteManager Sample

Record: http://www.nebraskatransportation.org/mat-n-tests/pdfs-docs/Materials_Management_Guidance/Sitemanager/SOP_Creating_Authorizing_SiteManager_Sample_Record.pdf

Generate a Report Template Facility (RTF) Report: http://www.dor.state.ne.us/mat-n-tests/pdfs-docs/Materials_Management_Guidance/Reporting/SOP_Generate_RT_Report.pdf

1.3 Abbreviations:

DOT: Department of Transportation

ID: Identification Number

M&R: NDOR Materials & Research

NDOR: Nebraska Department of Roads

RTF: Report Template Facility

SCL: Sampling Checklist

SMGR: SiteManager

2. Operational Instructions:

These instructions will provide the steps necessary to generate an SCL report in SMGR.

2.1 Main Panel:

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

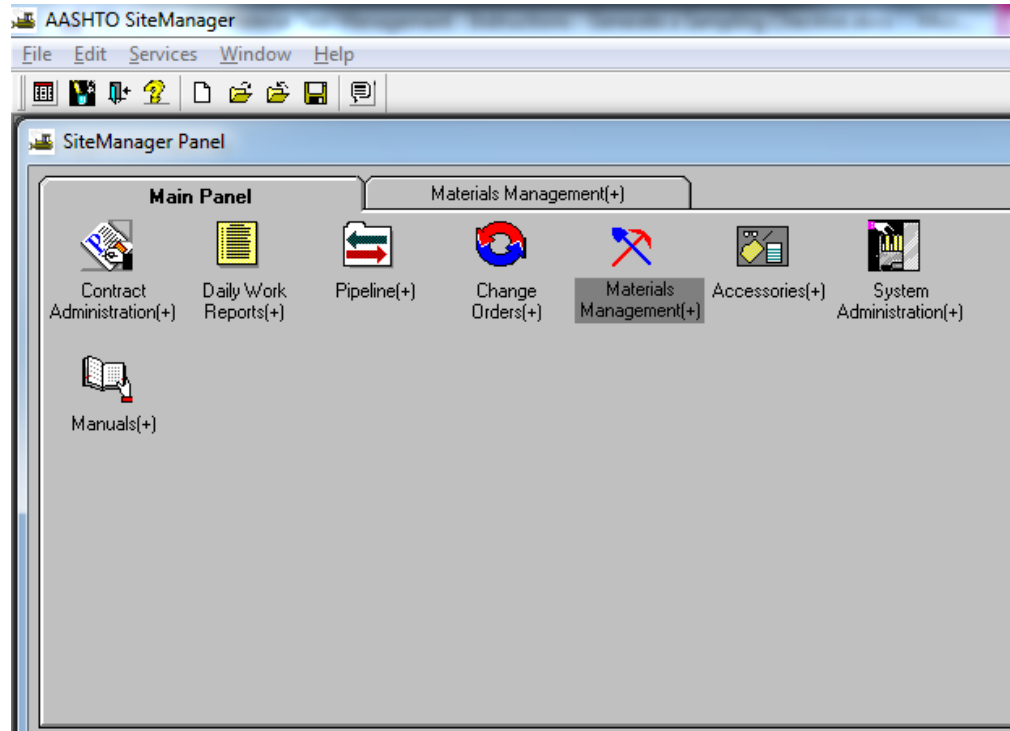


Figure 1, SMGR Main Panel

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

2.2 Materials Management:

Once selected, an array of Material Management (+) icons will be presented on the Materials Management (+) tab. From the Material Management (+) tab, select Process List.

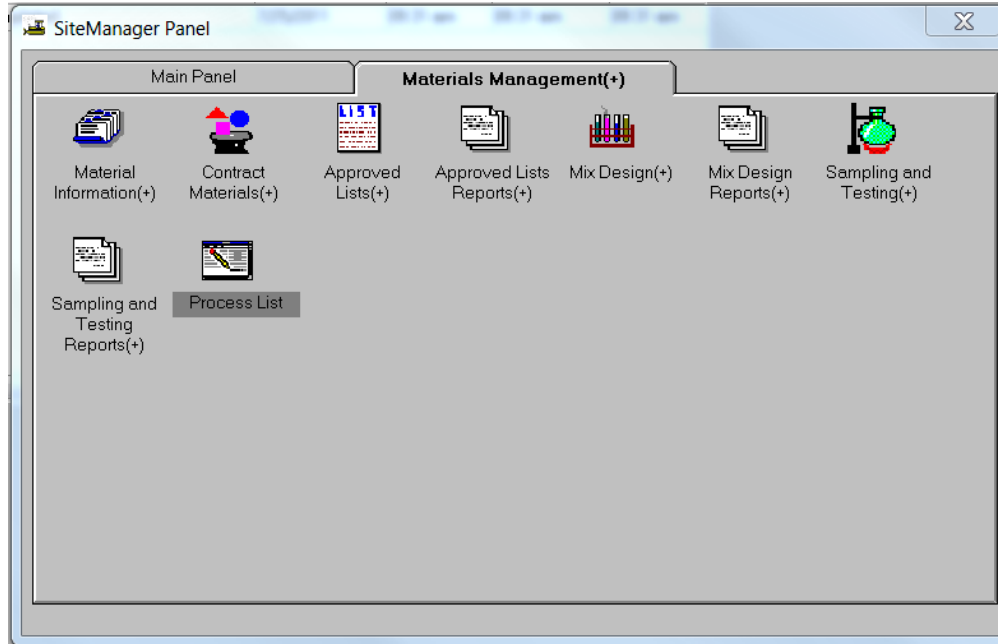


Figure 2, Materials Management (+)

2.3 Sampling Checklist:

The SCL is unique in its generation and the necessary steps to produce the checklist will be provided in this document. Instructions for all other report generation activities are provided in [Generate a Report Template Facility \(RTF\) Report](#).

2.3.1 Process List:

2.3.1.1 Column Headers:

The Process List will present all of the reports, in alphabetical order, that are available within SMGR. These column headers are available in the search window:

- Process ID: The SMGR-specific name of the process/report.
- Process Type: Denotes whether the process is a SMGR standard or custom process/report.
- Process Description: Short name description of the process/report.

| Process ID | Process Type | Process Description |
|------------|--------------|--|
| AGF00021 | Custom | Agg: Contract Summary-Field Grad-C33 Fine Sand |
| AGF00022 | Custom | Agg: P/S Summary-Field Gradations-C33 Fine Sand |
| AGF00023 | Custom | Agg: Contract Summary-Field Grad-Class C (Bx) |
| AGF00024 | Custom | Agg: Contract Summary-Field Grad-Chip Seal Aggregate |
| AGF00025 | Custom | Agg: P/S Summary-Field Gradations-Chip Seal Aggregate |
| AGF00026 | Custom | Agg: P/S Summary-Field Gradations-Gravel for Surfacing |
| AGF00027 | Custom | Agg: Contract Summary-Field Grad-Gravel for Surfacing |
| AGF00028 | Custom | Agg: P/S Summary-Field Gradations-Coarse Agg Pre-cast/stress |
| AGF00029 | Custom | Agg: Contract Summary-Field Grad-Coarse Agg Pre-cast/stress |
| AGF00030 | Custom | Agg: P/S Summary-Field Gradations-Gravel for Surfacing, X |
| AGF00031 | Custom | Agg: Contract Summary-Field Grad-Gravel for Surfacing, X |
| AGF00032 | Custom | Agg: P/S Summary-Field Gradations-Fine Agg Pre-cast/stress |
| AGF00033 | Custom | Agg: Contract Summary-Field Grad-Fine Agg Pre-cast/stress |
| AGF00034 | Custom | Agg: Contract Summary-Field Grad-Granular Backfill |
| AGF00035 | Custom | Agg: P/S Summary-Field Gradations-Granular Backfill |
| AGL00001 | Custom | Agg: Contract Summary-Central Lab-Mineral Agg/Armor Coat |
| AGL00002 | Custom | Agg: P/S Summary-Central Lab-Mineral Agg/Armor Coat |
| AGL00003 | Custom | Agg: Contract Summary-Central Lab-Class A (Silica Fume Fine) |
| AGL00004 | Custom | Agg: P/S Summary-Central Lab-Class A (Silica Fume Fine) |

Figure 3, Process List


To sort the Process List, click on the column headers (Process ID, Process Type, or Process Description). When sorting by Process Description, the SCL will be available at the top of the list.

| Process ID | Process Type | Process Description |
|------------|--------------|--|
| RMMSPCL | 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 4, Process List – Sorted

Two versions of the SCL appear on the Process List: Sampling Checklist and Sampling Checklist with Sample ID Numbers.

Dependent on the application of the SCL, identify the desired checklist from the Process

List, double click or select SCL, then click the Run Process icon, , to generate the report.

This action will display the Confirm Process Submission window.

2.3.2 Confirm Process Submission:

From the Confirm Process Submission window, select the appropriate Contract ID.

The Confirm Process Submission window has three buttons:

- Submit: Submits the selected process for execution
- Parameters: Displays the Process Submission Parameters window.
- Cancel: Exits the window without submitting the selected process for execution.

Click the Submit button.

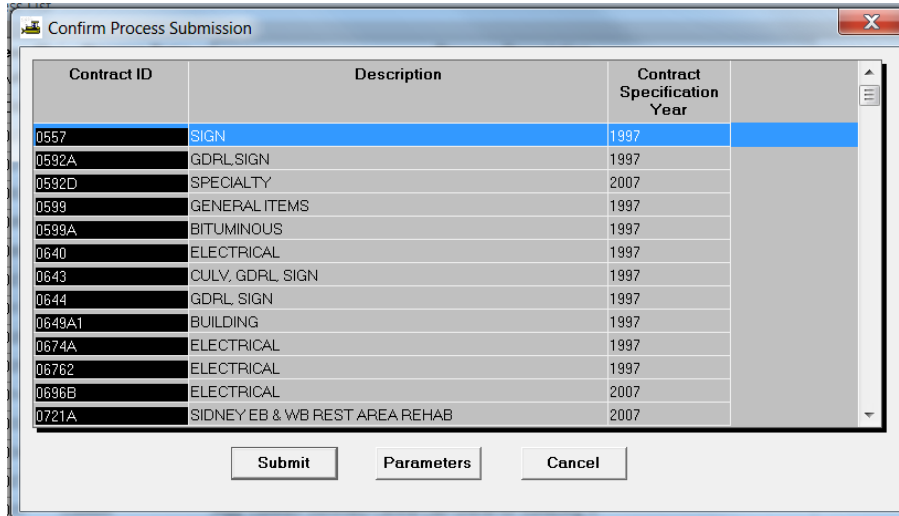


Figure 5, Confirm Process Submission

SMGR will present the following dialog boxes. Should other applications be open on the desktop, the Client Job Monitor and DPS Stats Monitor may open within those layers. Minimizing the open windows will allow SMGR to present the Client Job Monitor and DPS Stats Monitor as the focus messages.

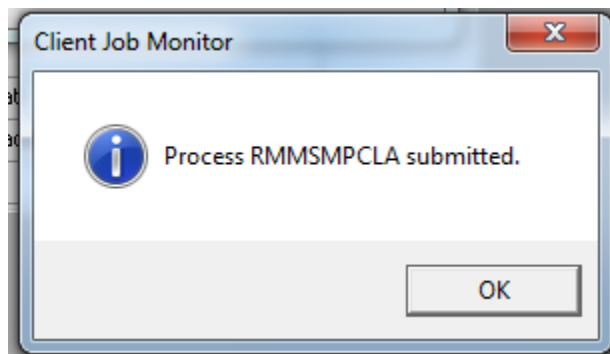


Figure 6, Client Job Monitor

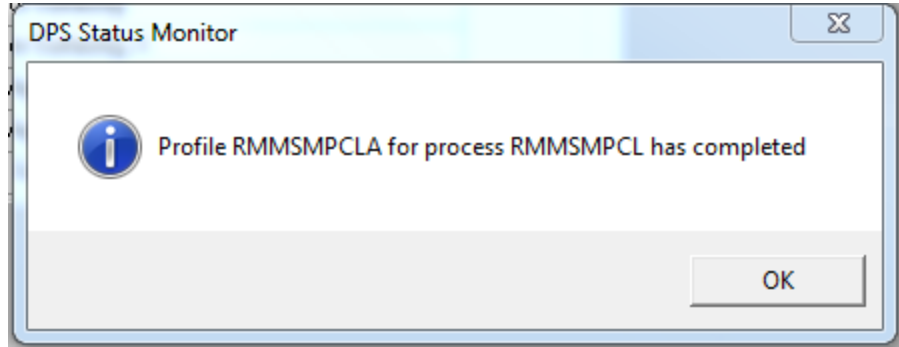


Figure 7, DPS Status Monitor

Click OK on both of them.

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

| Process ID: RMMSPCL Report Version: 10212010 Test Meth: N/A | State of Nebraska Department of Roads | Report Date: January 29, 2013 Materials & Research 1400 Hwy 2 Lincoln, NE 68502 | | | | | | | | | |
|--|---|--|----------------------|------|--------------|--|------------------------|---------------|----------|---------|---------|
| Sampling Checklist | | | | | | | | | | | |
| Contract ID: 1041 Location: 74 th ST & VAN DORN ST, LINCOLN (STIMULUS) Type of Work: ASPHALT WITH CONCRETE Vendor ID: 0574 | Federal/State Project: LCL0-5220(3) Letting Date: 12/17/2009 County: LANCASTER Vendor Name: CONSTRUCTORS, INC. | Route: | | | | | | | | | |
| DISCLAIMER: Material sampling requirements on the Sampling Checklist may not represent the actual number of samples required. Please refer to the project contract and the Materials Sampling Guide to make sure all material requirements are met. | | | | | | | | | | | |
| 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 Description | Cur Req | Tot Tha | Tot Comp | Tot Req | Tot Rem |
| 13041 000 | 0001 | 0001.08 | BARRICADE, TYPE II | BDAY | 900.000 | 8,034.000 | 8,034.000 | 8,034.000 | | | |
| 422RS - Reflective Sheeting | | | | | | | | | | | |
| P0128 - All Roads | | | | | | | | | | | |
| | | | | | | CHF001001 - Reflective Sheeting - Field | 1 | 0 | 4 | 1 | 0 |
| 13041 000 | 0002 | 0001.10 | BARRICADE, TYPE III | BDAY | 1,122.000 | 1,278.000 | 1,278.000 | 1,278.000 | | | |
| 422BWL - Barricade Warning Lights Type A | | | | | | | | | | | |
| P0071 - Empco-Lite | | | | | | | | | | | |
| | | | | | | MSF001001 - Approved Products Usage Verification - Field | 1 | 0 | 2 | 1 | 0 |
| 422RS - Reflective Sheeting | | | | | | | | | | | |
| P0128 - All Roads | | | | | | | | | | | |
| | | | | | | CHF001001 - Reflective Sheeting - Field | 1 | 0 | 3 | 1 | 0 |
| 13041 000 | 0006 | 0002.55 | OVERLAY BROKEN LINES | STA | 164.000 | 0.000 | 0.000 | 0.000 | | | |
| 422GB - Pavement Marking Glass Beads | | | | | | | | | | | |
| | | | | | | CHF002001 - Pavement Marking Glass Beads - Field | 0 | 0 | 0 | 1 | 1 |
| 422PMTP - Pavement Marking Traffic Paint | | | | | | | | | | | |
| | | | | | | CHF003001 - Pavement Marking Traffic Paint - Field | 0 | 0 | 0 | 1 | 1 |
| 422RPMTT - Raised Pavement Marker | | | | | | | | | | | |
| | | | | | | MSF001001 - Approved Products Usage Verification - Field | 0 | 0 | 0 | 1 | 1 |
| 422TPMTI - Temporary Pavement Marking Tape Type I | | | | | | | | | | | |
| | | | | | | MSF001001 - Approved Products Usage Verification - Field | 0 | 0 | 0 | 1 | 1 |
| 422TPMTII - Temporary Pavement Marking Tape Type II | | | | | | | | | | | |
| | | | | | | MSF001001 - Approved Products Usage Verification - Field | 0 | 0 | 0 | 1 | 1 |

Figure 8, Sampling Checklist

| | | | | | | | | | |
|--|---|---|----------------------------|-------------|---------------------|--|-------------------------------|----------------------|------------------|
| Process ID: MSX00008 Report Version: 10212010 Test Meth: N/A | State of Nebraska Department of Roads | Report Date: January 29, 2013 | | | | | | | |
| Sampling Checklist | | Materials & Research 1400 Hwy 2 Lincoln, NE 68502 | | | | | | | |
| Contract ID: 1041 Location: 'A' ST & VAN DORN ST, LINCOLN (STIMULUS) Type of Work: ASPHALT WITH CONCRETE Vendor ID: CST4 | Federal/State Project: LCLC-82203 Listing Date: 12/17/2009 County: LANCASTER Vendor Name: CONSTRUCTORS, INC. | Route: | | | | | | | |
| DISCLAIMER: Material sampling requirements on the Sampling Checklist may not represent the actual number of samples required. Please refer to the project contract and the Materials Sampling Guide to make sure all material requirements are met. | | | | | | | | | |
| 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 Description | Cur Req | Tot Tha | Tot Camp |
| 13041 000 | 0001 | 0001.08 | BARRICADE, TYPE II | BDAY | 900.000 | 8,034.000 | 8,034.000 | 8,034.000 | 8,034.000 |
| 422RS - Reflective Sheeting = | | | | | | | | | |
| P0128 - All Roads | | | | | | | | | |
| | | | | | | CHF001001 - Reflective Sheeting - Field | 1 | 0 | 4 |
| | | | | | | Auth By: CON80099 - Byrne, Tim | | 106009910021 | COMP |
| | | | | | | Auth By: CON80186 - Castillo, Nick | | 106016712003 | COMP |
| 13041 000 | 0002 | 0001.10 | BARRICADE, TYPE III | BDAY | 1,122.000 | 1,278.000 | 1,278.000 | 1,278.000 | 1,278.000 |
| 422BWL - Barricade Warning Lights Type A = | | | | | | | | | |
| P0071 - Empco-Lite | | | | | | | | | |
| | | | | | | MSF001001 - Approved Products Usage Verification - Field | 1 | 0 | 2 |
| | | | | | | Auth By: CON80187 - Saathoff, Randy | | 106016712010 | COMP |
| | | | | | | Auth By: CON80186 - Castillo, Nick | | 116016610902 | COMP |
| 422RS - Reflective Sheeting = | | | | | | | | | |
| P0128 - All Roads | | | | | | | | | |
| | | | | | | CHF001001 - Reflective Sheeting - Field | 1 | 0 | 3 |
| | | | | | | Auth By: CON80099 - Byrne, Tim | | 106009910022 | COMP |
| | | | | | | Auth By: CON80186 - Castillo, Nick | | 106016712003 | COMP |

Figure 9, Sampling Checklist with Sample ID Numbers

Note: The time necessary for the SCL to open in Internet Explorer is dependent on the size of the SCL. Please be aware that SCL's for large projects may take a few minutes to generate.

To monitor the status of the generation, from the Services menu, select Process Status.

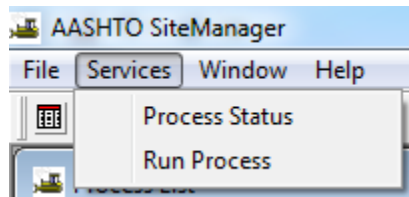


Figure 10, Services Menu, Process Status

2.3.3 Reviewing the Sampling Checklist:

The SCL will provide information regarding the current test status of items on a contract established by the contract sampling and testing requirements.

The report can be used to identify discrepancies between the total number of required samples and the number of samples taken based on the current quantity throughout the lifecycle of the contract and at finalization. The report contains information on required values such as the number of samples created over the life of a contract or the number of samples that should be taken in accordance with current installed quantities, along with the current values, such as the number of samples taken to date. For more information, see [Assessing SiteManager Material Discrepancies](#).

A sample is considered taken when it is complete but pending authorization. A sample is considered complete when the status is 'Complete' and the sample has been authorized. For more information, see [Creating and Authorizing a SiteManager Sample Record](#).

2.3.3.1 Contract ID:

The primary identifier of the contract.

2.3.3.2 Fed State Project Number:

The federal or state project number for the contract, project, or category.

2.3.3.3 Location:

The physical location of the work.

2.3.3.4 Type of Work:

A Department of Transportation (DOT) defined code which can be used to identify the major type of work being done on the contract.

2.3.3.5 County:

Identifies the primary county where the work is being performed

2.3.3.6 Route:

Route number of the road affected.

2.3.3.7 Vendor ID:

Identifier for the vendor.

2.3.3.8 Project:

Identifier for the project.

2.3.3.9 Line Item:

The contract line item number which uniquely identifies each item as it appears on the proposal and contract.

2.3.3.10 Item Code:

The agency-defined code used to identify a particular item.

2.3.3.11 Item Description:

Description of the item.

2.3.3.12 Unit:

Unit of measure for this item.

2.3.3.13 Bid + CO Qty:

The bid quantity of the line item plus the change order quantity for the item.

2.3.3.14 Installed Qty:

Quantity of line item represented by the samples (sum of quantities entered on Contract tab of Sample Information window).

2.3.3.15 Material:

Identifier for the material.

The SCL explicitly defines the material requirements for the specified project. Proper material selection, as provided for under the SCL heading 'Material' will ensure sampling requirements are accurately documented, thus eliminating or reducing the potential for SMGR material discrepancies.

2.3.3.16 Producer/Supplier:

Producer/supplier code and name.

2.3.3.17 Test Description:

Method by which the sample was taken and/or tested.

Accurate material selection will further ensure appropriate test methods are employed during material testing as the NDOR-sanctioned test methods are linked to the individual materials. These test methods are further governed by timeframes (i.e. letting dates) so that only the appropriate methods are used in accordance with NDOR-approved sampling guidance.

2.3.3.18 Cur Req (Current Required Samples):

The number of samples that should be taken to date based on the current installed quantities of the line item.

2.3.3.19 Tot Taken (Total Taken):

Total number of samples including the number of samples satisfying contract sampling and testing requirement criteria but not authorized.

These samples may or may not satisfy material discrepancies.

Failing samples will appear in red on the Sampling Checklist with Sample ID Numbers.

| | | | | | | | | | | | |
|---|------|---------|---|----|-------|--|-------|-------|---|---|---|
| 12440 000 | 0113 | 6011.11 | PRECAST/PRESTRESSED CONCRETE SUPERSTRUCTURE | LS | 1.000 | 1.000 | 1.000 | 1.000 | | | |
| 705PSPCC - Prestressed Portland Cement Concrete | | | | | | | | | | | |
| PS003 - Lincoln-Concrete Industries | | | | | | | | | | | |
| | | | | | | PCX002001 - PCC Plant and Field Performed Test | 0 | 2 | 5 | 0 | 0 |
| Auth By: DOR9078 - Gernert, Tom | | | | | | 0731105P0014 COMP | | | | | |
| Auth By: - | | | | | | 0731105P0015 RECE | | | | | |
| Auth By: DOR34246 - Jirkovsky, Kim | | | | | | 0731105P0020 COMP | | | | | |
| Auth By: DOR34246 - Jirkovsky, Kim | | | | | | 0731105P0023 FAIL | | | | | |
| Auth By: DOR34246 - Jirkovsky, Kim | | | | | | 0731105P0038 COMP | | | | | |
| Auth By: - | | | | | | 0731105P0039 RECE | | | | | |
| Auth By: DOR34246 - Jirkovsky, Kim | | | | | | 0731105P0040 COMP | | | | | |

Figure 11, Sampling Checklist with Sample ID Numbers – Failing Sample

2.3.3.20 Tot Comp (Total Completed Samples):

Number of samples satisfying all criteria.

2.3.3.21 Tot Req (Total Required Samples):

Total number of samples that should be taken based on the total current quantity of the line item.

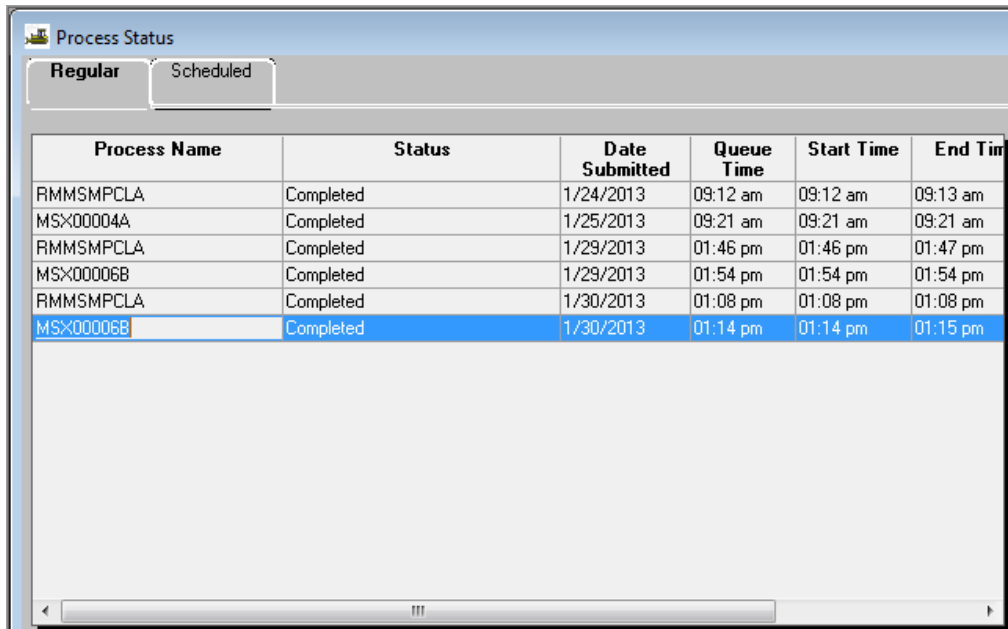
2.3.3.22 Tot Rem (Total Remaining Samples Required):

Total samples required minus total samples completed (i.e., Tot Req – Tot Comp = Tot Rem).

2.4 Delete Report:

SMGR provides for report deletion in two ways.


Reports listed on the Regular tab will be deleted automatically after seven days.



The screenshot shows a window titled "Process Status" with two tabs: "Regular" (selected) and "Scheduled". Below the tabs is a table with the following data:

| Process Name | Status | Date Submitted | Queue Time | Start Time | End Time |
|--------------|-----------|----------------|------------|------------|----------|
| RMMSMPCLA | Completed | 1/24/2013 | 09:12 am | 09:12 am | 09:13 am |
| MSX00004A | Completed | 1/25/2013 | 09:21 am | 09:21 am | 09:21 am |
| RMMSMPCLA | Completed | 1/29/2013 | 01:46 pm | 01:46 pm | 01:47 pm |
| MSX00006B | Completed | 1/29/2013 | 01:54 pm | 01:54 pm | 01:54 pm |
| RMMSMPCLA | Completed | 1/30/2013 | 01:08 pm | 01:08 pm | 01:08 pm |
| MSX00006B | Completed | 1/30/2013 | 01:14 pm | 01:14 pm | 01:15 pm |

Figure 12, Process Status

Reports can be removed manually from the Regular and/or Scheduled tabs by selecting the report and clicking the Delete button .