NDOR SiteManager Materials Management

SiteManager Materials & Research
Administrator Instructions

Zero Out Contract Requirements

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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(+).
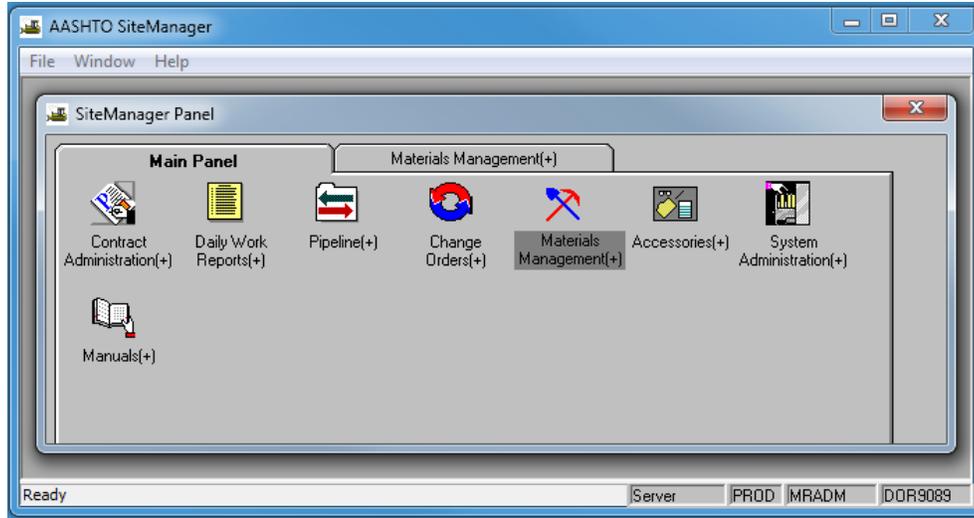

Figure 1, Main Panel

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

2.2 Materials Management:
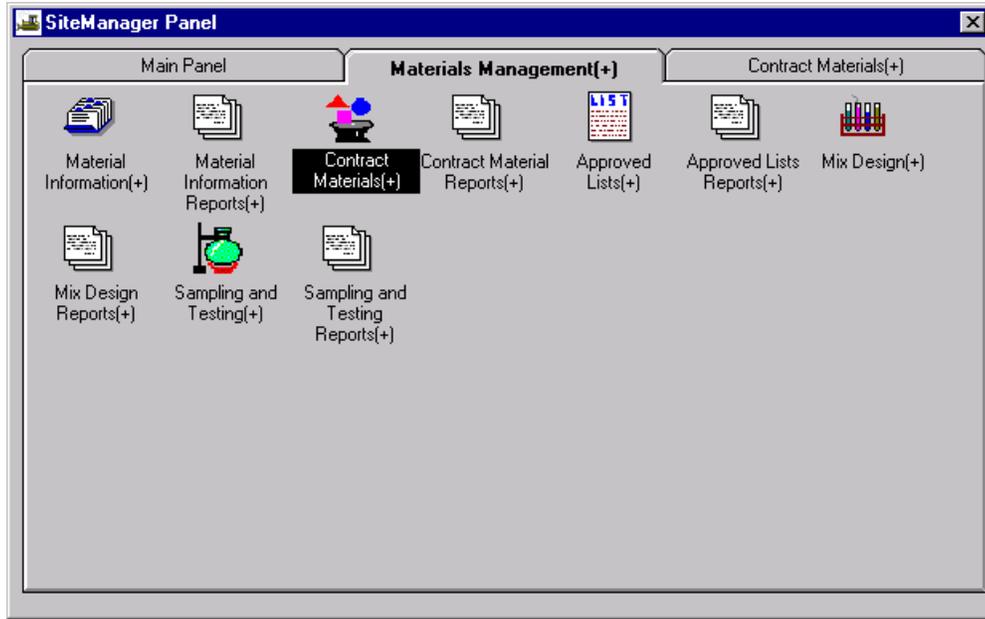
Select Contract Materials(+) Icon.

Figure 2, Materials Management (+)

2.3 Contract Sampling and Testing:
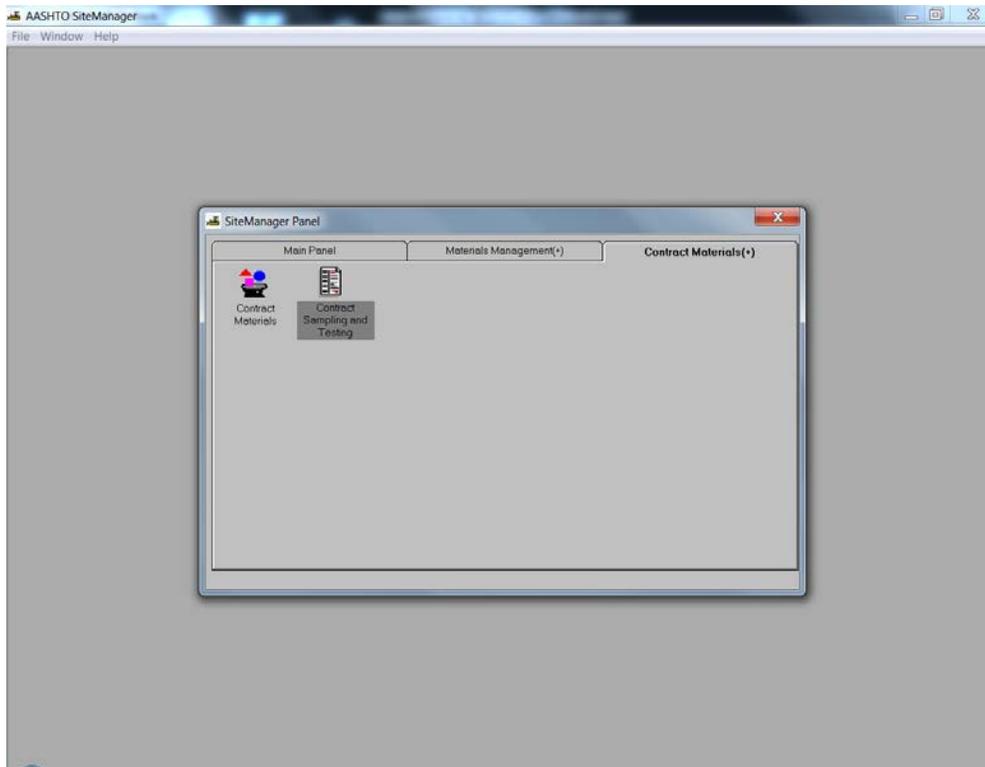
Select Contract Sampling and Testing.

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.
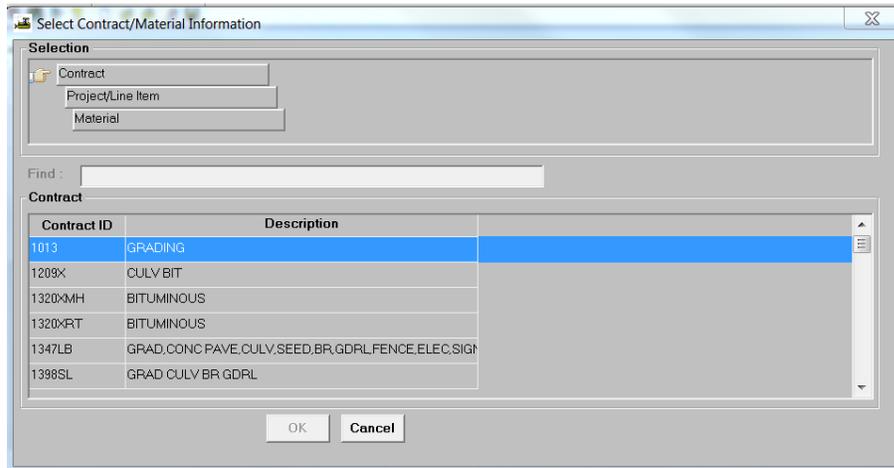

Figure 4, Contract/Material Information

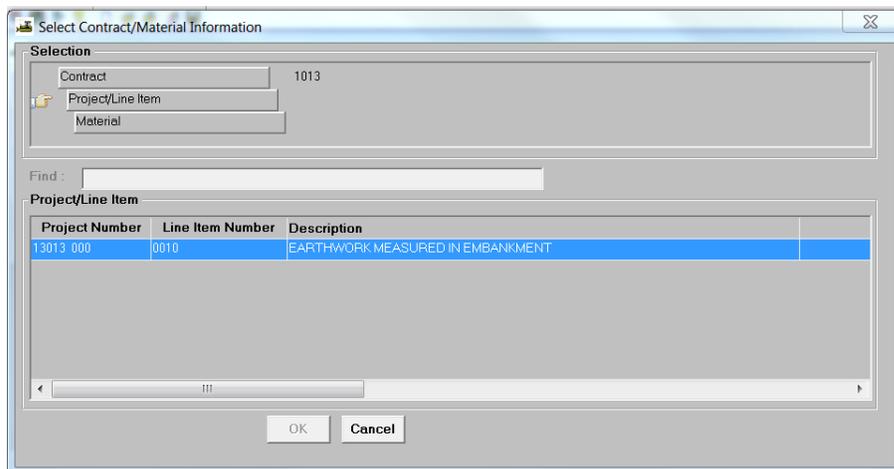Select the Project/Line Item from the list by highlighting the appropriate row and double click.

Figure 5, Contract/Material Information

Select the Material from the list by highlighting the appropriate row and click OK.
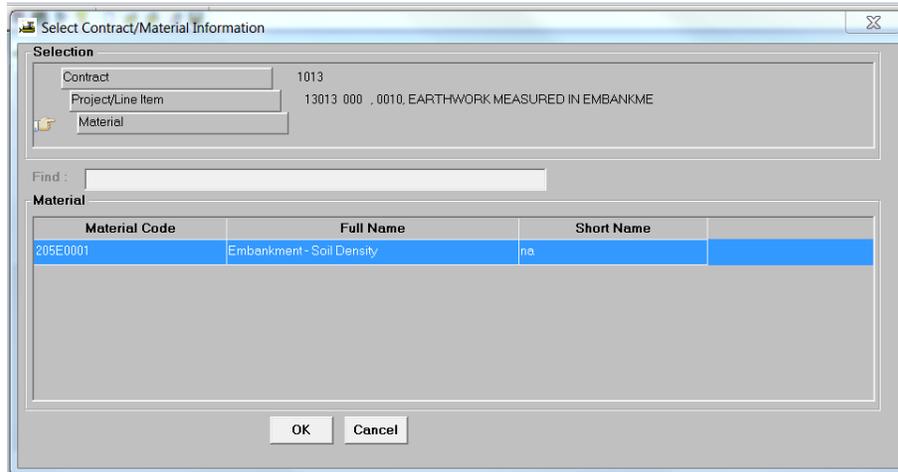
NDOR SiteManager Materials Management
SiteManager Materials & Research Administrator Instructions – Zero Out Contract Requirements

Figure 6, Contract/Material Information

2.4 Contract Sample and Testing Requirements:

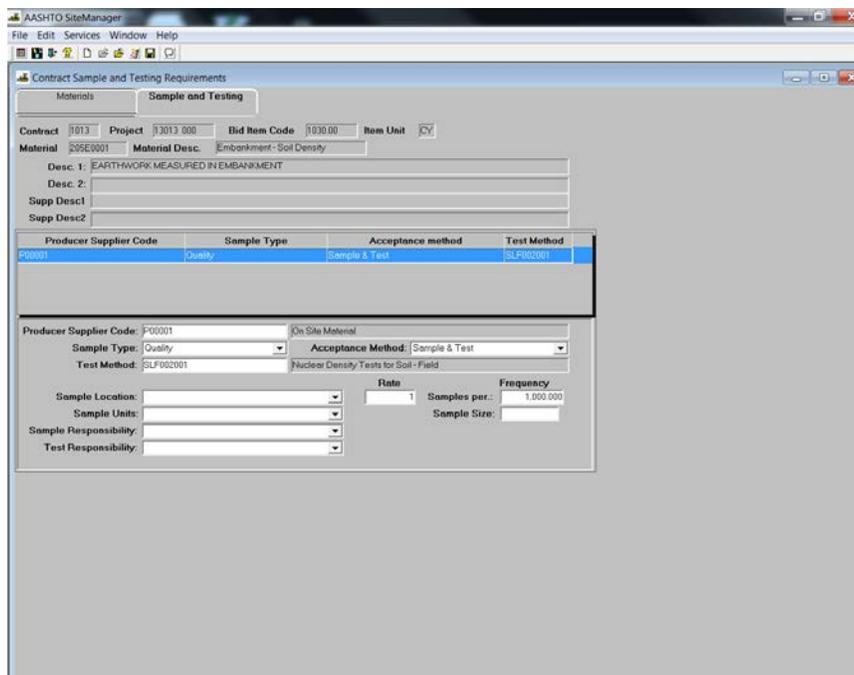The Contract Sample and Testing requirements folder will be presented. Select the Sample and Testing tab.

Figure 7, Sample and Testing

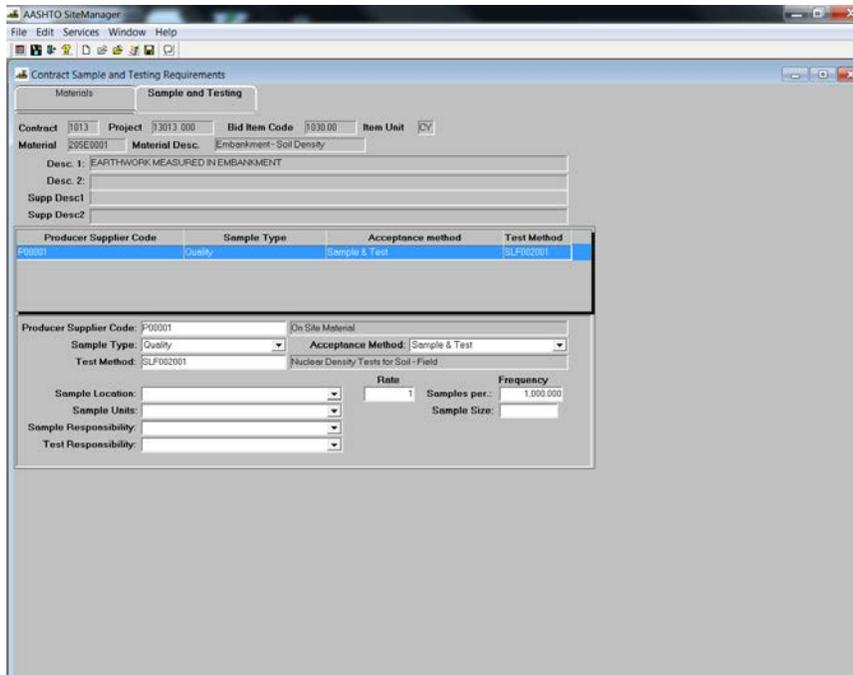From the upper grid, select the record that will be zero'd out.

Figure 8, Sample and Testing

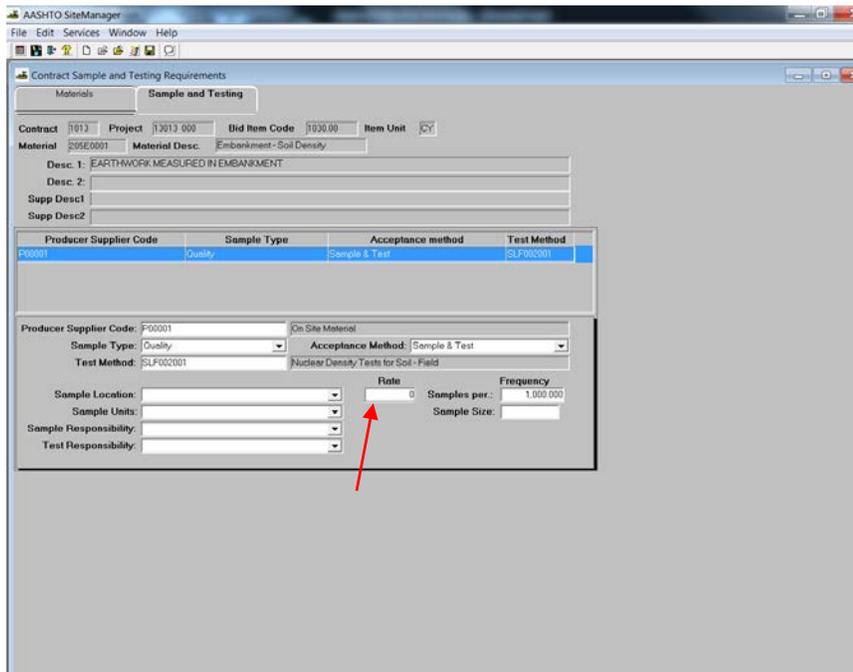Set the Rate value to '0' (zero).

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.
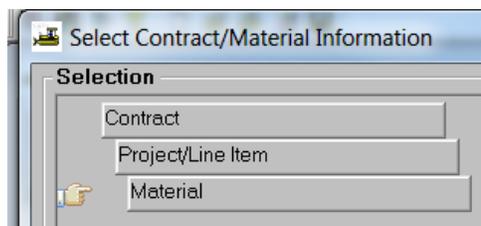

Figure 11, Contract/Material Informatin

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.

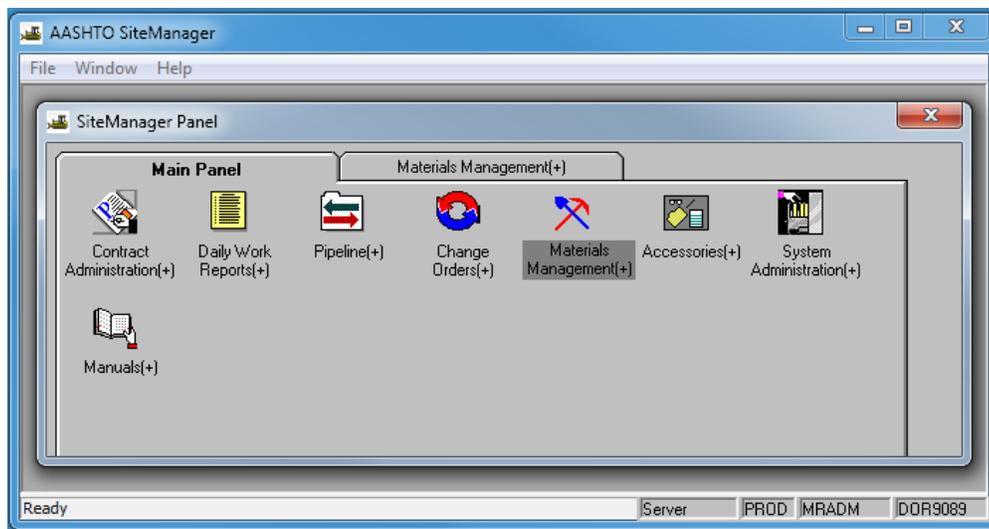From the Main Panel, select Materials Management(+).

Figure 12, Materials Management (+)Sample and Testing

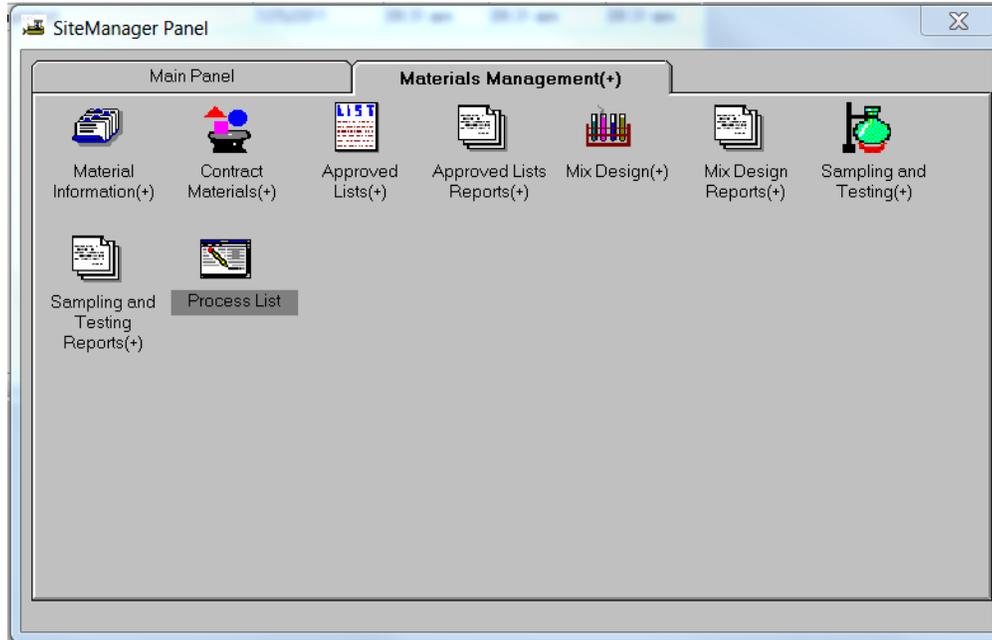From the Material Management(+) tab, select Process List.

Figure 13, Materials Management – Process List

From the Process List, select the Sampling Checklist.

Figure 14, Process List

From the Services Menu, select Run Process
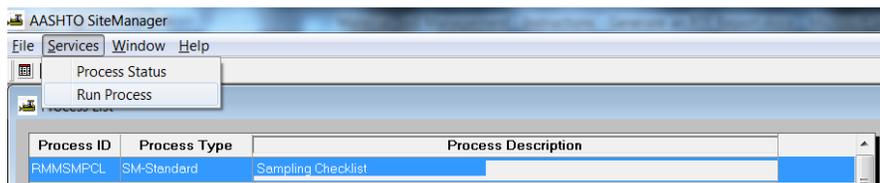
Figure 15, Services Menu

From the Confirm Process Submission window, select the appropriate Contract ID and click the Submit button.
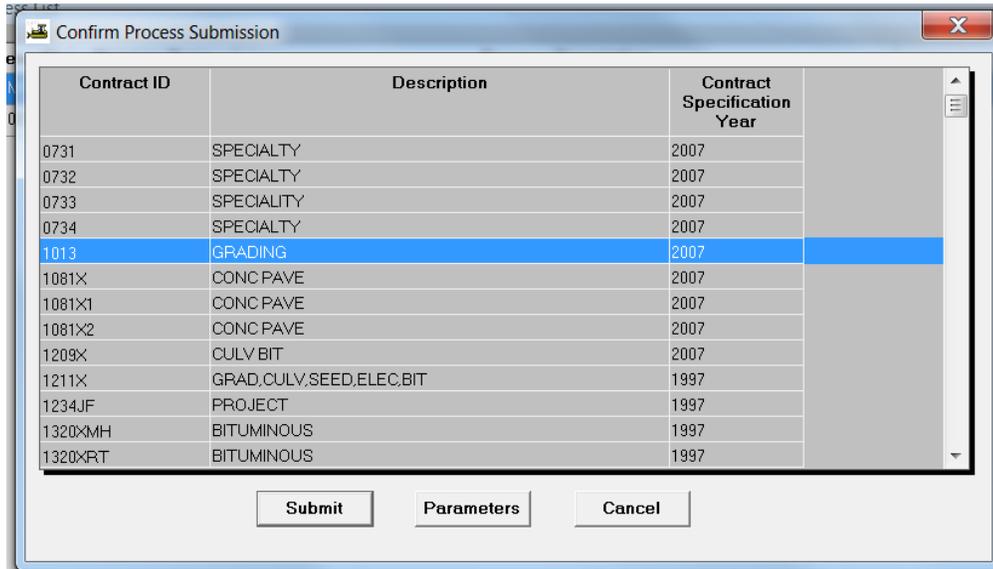
Figure 16, Confirm Process Submission

SMGR will present the following dialog boxes.
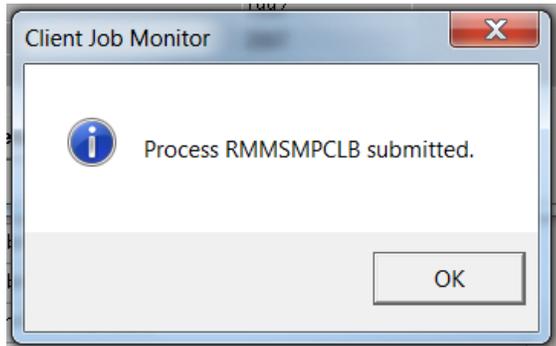
Figure 17, Client Job Monitor
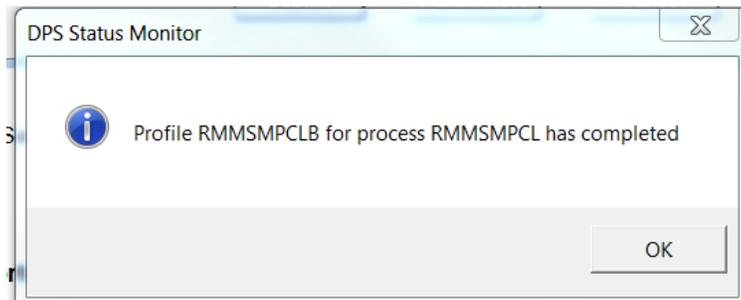
Figure 18, DPS Status Monitor

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: RMMSMPCL Revision: 03222006 Tst Meth: N/A			State of Nebraska Department of Roads Sampling Checklist					Rpt Date: August 12, 2011 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	Tot Req	Tot Rem
13013 000	0010	1030.00	EARTHWORK MEASURED IN EMBANKMENT	CY	329.000	0.000	0.000					

205E0001 - Embankment - Soil Density
P00001 - On Site Material

						Test Type	Cur Req	Tot Tkn	Tot Cmp	Tot Req	Tot Rem
						SLF002001	0	11	0	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).
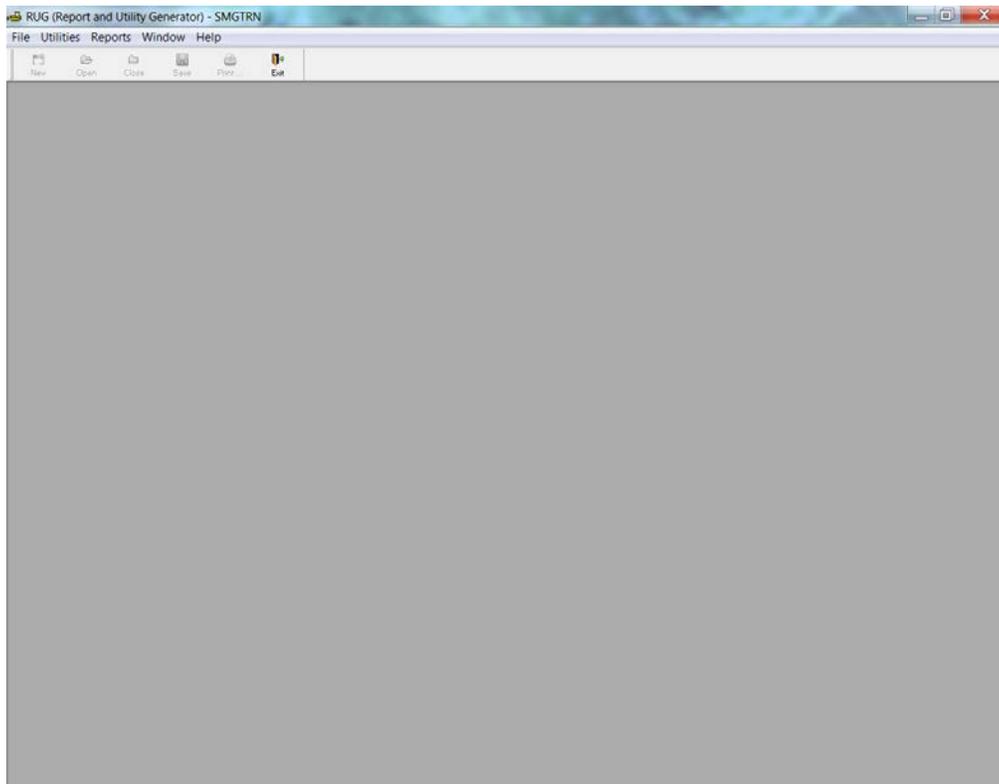
Open RUG to the home page.

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.
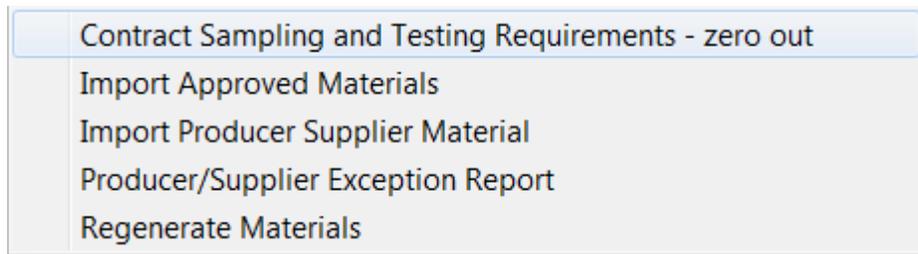

Figure 22, Materials and Research Menu

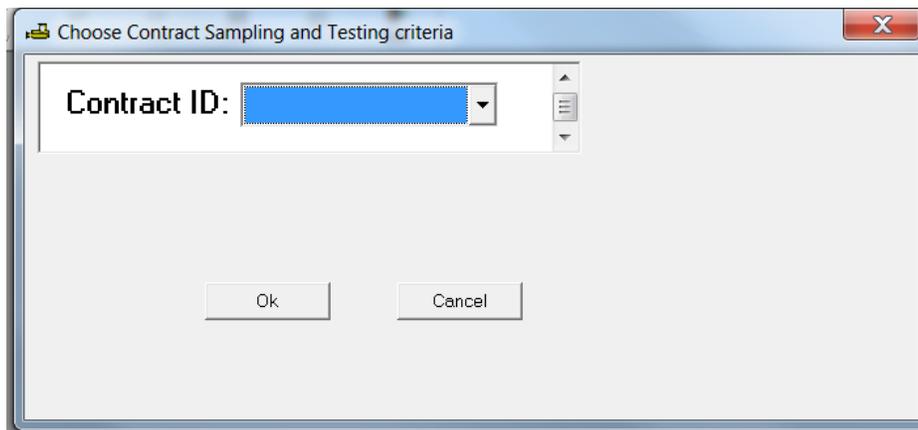The Choose Contract Sampling and Testing criteria frame will open.

Figure 23, Contract Sampling and Testing Criteria

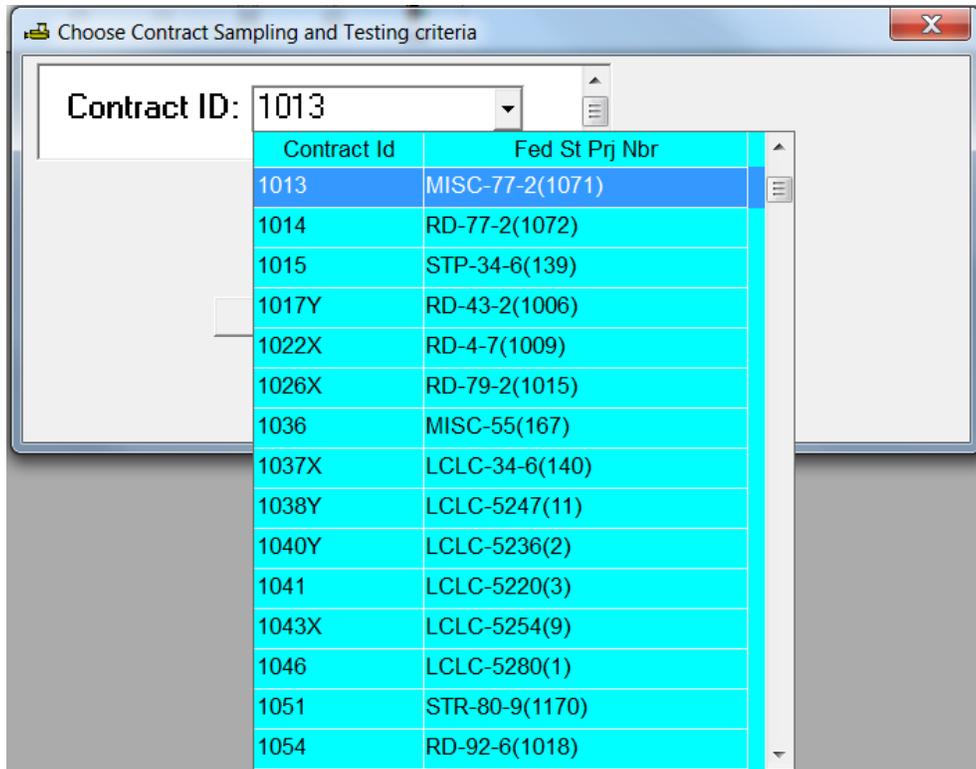Using the drop down menu, select the desired Contract ID and click OK.

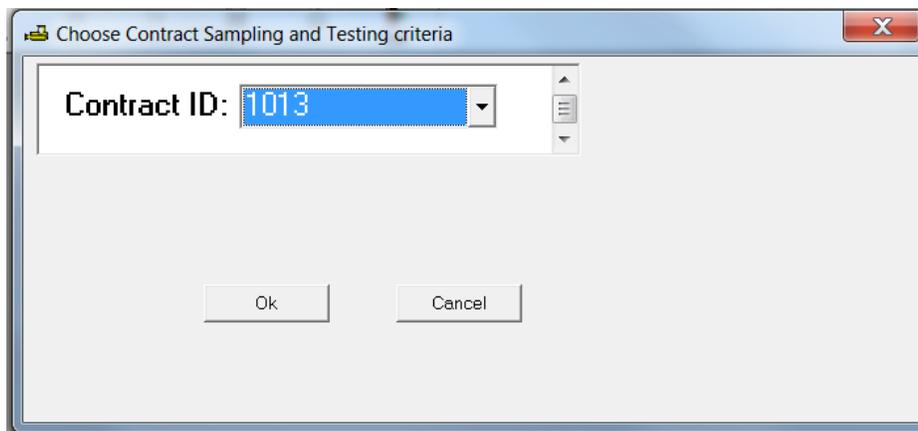*Figure 24, Contract Sampling and Testing Criteria*

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).

Figure 26, Contract Sampling and Testing Requirements

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

Figure 27, Contract Sampling and Testing Requirements

Figure 28, Contract Sampling and Testing Requirements

From the Menu bar, select Save, [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.

Rpt-ID: RMMSMPCL			**State of Nebraska**					Rpt Date: August 12, 2011	
Revision: 03222006			**Department of Roads**						
Tst Meth: N/A								Materials & Research	
								1400 Hwy 2	
			Sampling Checklist					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	Tot Req	Tot Rem

Project	Line Item	Item Code	Item Description	Unit	Bid + CO Qty	Qty Reported To Date	Qty Authorized To Date	Installed Qty
13013 000	0010	1030.00	EARTHWORK MEASURED IN EMBANKMENT	CY	329.000	0.000	0.000	0.000

205E0001 - Embankment - Soil Density
P00001 - On Site Material

	Test Type	Cur Req	Tot Tkn	Tot Cmp	Tot Req	Tot Rem
	SLF002001	0	11	0	0	0

Figure 29, Example – Sampling Check List