



## QUICK REFERENCE GUIDE:

# Action Relationships

## Background:

An action is a test, inspection, or certification performed on a construction material or item. An action relationship most often associates an action and a material category, but it can also link an action with a material, item, or item family. Action relationships are preconditions for creating acceptance actions, reference specifications, and test assignment information records, which themselves are preconditions for assigning tests to sample records.

There is a link on the Dashboard to all the action relationships that have been created in the system, but working with action relationships is best done from the material category that is being associated.

## Roles:

Global Materials Admin, Materials Rover (view only), Materials Lab Supervisor (view only)

## Navigation:

Materials Reference Data > Material Categories >

1. On the Material Category Overview page, use the search and filter fields to find the desired material category and click on its **Material Category Code**.
2. On the Material Category Summary page, select the **Action Relationships** tab on the left. The system displays the action relationships that have been set up on this material category.

*To allow for testing samples of a material within a category:*

3. Your action relationship will connect the category to the desired test method. Click the **New** button to create a new action relationship.
4. In the **Action Documentation Type** dropdown, select Sample Record.
5. In the **Test Method** autocomplete field, begin typing the name of the desired test method and select it when it populates.
6. In the **Sample Type** dropdown, select the desired sample type.
7. In the **Action Relationship Description** field, follow the Action Relationship Naming Conventions in providing a description.
8. In the **Effective Date** field, enter today's date.
9. In the **Status** dropdown field, select ACTIVE.
10. Click **Save** in the upper right corner. You will still need to create a test assignment information record based on the new action relationship. See *Global Materials - Test Assignment Information QRG*.

*To allow for tracking acceptance for materials within a category:*

11. Your action relationship will connect the category to the documents that will be required for acceptance. Click the **New** button to create a new action relationship. Then:
  - a. To require material tests, select an **Action Documentation Type** of Sample Record and choose a **Test Method** and **Sample Type**.
  - b. To require DWR acceptance records, select an **Action Documentation Type** of Daily Work Report and select "Doc – Documentation" in the **Field Inspection Value** dropdown.
  - c. To require completed agency views attached to DWR acceptance records, select an **Action Documentation Type** of Daily Work Report. In the **Agency View Name** autocomplete field, select the desired agency view.
12. In the **Action Relationship Description** field, follow the Action Relationship Naming Conventions in providing a description.
13. In the **Effective Date** field, enter today's date.
14. In the **Status** dropdown field, select ACTIVE.

If you need further assistance please contact your [Module Admin](#)  
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15. Click **Save** in the upper right corner. You will still need to create an acceptance action based on the new action relationship. See *Global Materials - Acceptance Actions QRG*.

### Next Steps:

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