Item Material Sets

Background:

A material set is a group of materials associated with an item. When you associate a material set with a reference item, the material set, materials within it, and acceptance actions associated to them also apply to any contract project items based on the reference item. An item can have multiple material sets, each representing a different combination of materials that might be used in its installation. A conversion factor establishes how many units of each material go into each unit of the item.

Roles:

Global Materials Admin

Navigation:

Reference Data > Items >

1. On the Item Overview page, use the search and filter fields at the top of the page to find the desired item. Click on its **Item** link.
2. On the Item Summary page, select the **Material Sets** tab on the left. The system displays all existing material sets on the item and the number of materials in each.

To copy material sets from one item to another:

1. To copy only one material set, find the desired material set, click its Row Actions menu arrow on the right, and select **Copy Material Set to Items**. To copy all the item's material sets, click the blue arrow next to the New button, and select **Copy Material Sets to Items**.
2. In the Copy Material Set(s) to Items window, use the search and filter fields to find the desired items and click on their rows to select them.

3. If you are copying only one material set, edit the **Name** field at the top if you would like the copies to have a different name than the original.
4. Click **Copy** at the bottom of the page.

To add a new material set:

1. Click the **New** button.
2. In the new row, enter a name in the **Material Set** field.
3. Click **Save** in the upper right corner.

To edit an existing material set:

1. Find the desired material set and click on its **Materials** link.
2. To add a material to the material set, click the **Select Materials** button. In the Select Materials window, use the search and filter fields to find the desired materials, click on their rows to select them, and click the **Add to Item** button at the bottom of the page.
3. To add or edit how much of a material goes into each unit of the item, enter a value in the desired material's **Conversion Factor** field.
4. Click **Save** in the upper right corner.

Next Steps: