

FieldManager.



Users Guide

Release 4.7a

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Examples of IDR documentation and referencing

1. The FieldManager Support Directory

Guy Berthiaume	592-6390	624-3534
Kevin Hanlon	624-3474	592-2015

Minimum required usage of FieldManager

Stockpile Payments Contract Modifications Progress Estimates IDR (Inspectors Daily Report) Item History to Date

The Progress Estimates and Item History to Date are created from the information entered into the IDR (Inspectors Daily Report).

2. User Setup and Preferences

2.1 Login and Adding Users

The first time that you login to FieldManager:

User ID: admin Password: password

After logging in for the first time you will need to create your own ID – this is done by going to the Utilities menu at the top of the screen and then down to System Management and over to Maintain Users. This will open the Users list window – see Figure 2-1

829	1	3	<u>ج</u>	7	₽₽	۵	2	S					
Add	Change	Delete	Review	Filter	Sort	Print	Refresh	FN MailBox	_				_
🤯 Use				_							Fil <u>t</u> er:	Ne en contra de la	
Find La	st Name:		1	-	Middle	Ĩ.		-			rii <u>t</u> er:	SHOW AIR	-
	Last Name	e	First	Name	Initial		User ID		Initials	Security Level			
Admini	strator		System			admin		ę	5A	System Administrator			
Berthia	ume		Guy			guy		(GB	System Administrator			
Doe			John			doe		-	ID	FieldManager User			
Smith			Jane			smith		1	IS	FieldManager User			

Figure 2-1 User List Window

By clicking the Add button at the top of the page an add user box will be displayed – see Figure 2-2

	Manager (Contr										
File Edit	View Utilities V		, ₩								
Close	SpellCheck Print	Refresh	FN MailBox						 		
Dogu	😻 Add User										
Dogu											
Contractors	User ID:				User Initials:						
₩ I <u>D</u> R≠	User Name:	4	.ast Name)		(First Name)		Middle Initial)				
) Diagies	Phone No:		ast warne)		(First Name)	(n	nuole initial)				
2	Password:	****		R	e-enter Password:	***					
jtems	Security Level:			•							
Materials											
<u>E</u> stimates											
Cont Mods											
Misc Rpts											
Misc Rpts											
Inguiries											
						ОК	Cancel	1			
									 -		
Ready									Trainning	quy	

Figure 2-2

Fill in the required fields as follows:

User ID – anything that you want (letter and/or numbers – no spaces) no minimum length. This is used for program login only and not displayed on any forms or reports.

User Initials – can be used in report / forms searches.

Last Name / First Name – Used on Reports and forms.

Middle Initial – Note needed

Phone No. – Not needed

Password – anything that you want (letter and/or numbers – no spaces) no minimum length. Security Level – This is dependent upon the kind of user that is being created.

FieldManager: Inspector using FieldBook and or FieldManager **FieldBook:** Inspector using FieldBook only **Read Only:** Auditor or other being allowed to review information only **System Administrator:** Resident and/or Computer owner

All user ID's are included with exports to Fieldbook

2.2 User Preferences

By going to the Utilities menu at the top of the page and then down to User Preferences – The User Preferences Tab Window will be displayed (see Figure 2-3 thru 2-8).

🖗 User I	Preferences		>
General	Window Settings	Entry Defaults Import Export Toolbar Inquiries	1
Default	Datasource: Train	ing	
Current	Datasource: Train	ing	LISS ID
		rour	User ID
Defa	ult User ID:		
	Database		
Backup	Decation: c:\fieldm	gr\Database\Backup	
I ₩a	rn User When Exitir	g Application	
T Auto	omatically Get Mail 1	rom FieldNet When Logging In	
	0.0000000072600000000		
		OK Cancel Help	

Figure 2-3 General Tab

General Tab – If an entry is made in the Default User ID is will automatically be applied to the FieldManager login window and not have to be entered during every login – the password will still have to be entered.

eneral	Window Settings	Entry Defaults	Import	Export	Toolbar	Inquiries
•	Include column hea (include the column he		ng one or r	nore rows	from a list	window to the clipboard)
▼	Save list window set (settings = column order			ler)	eset Settir	ngs
•	Save modal window (settings = column orde			eset Settir	ngs	
~	Save built-in filter se	ettings when clo	sing list	Re	eset Settir	ngs

Figure 2-4 Window Settings Tab

List Window Tab – Gives the user options on how lists will be displayed when leaving and reentering them.

neral W	indow Settings	Entry Defaults	Import	Export	Toolbar	Inquiries	
Item Po	osting						
	Station and Loc	ation fields defa	ult to last	entry			
	Change Local			, one j			
•	Remarks field o	lefault <mark>t</mark> o last ent	iry				
Materia	al Approval					1	
	Form Date field	default to last er	ntry				
V	File field default	t to last entry					
v	Form field defa	ult to last entry					
1.000							
	Form Sequence	Number field de	fault to l	ast entry			
v	Source field de	fault to last entry	i.				

Figure 2-5 Entry Defaults Tab

Entry Defaults Tab – Checked options will be brought forward to new Postings or Material Approvals (Material Approvals not used by MDOT at this time).

😺 User I	Preferences					×
General	Window Settings	Entry Defaults	Import Export	Toolbar II	nquiries	
	-					
	Add Locat	ion	Delete Location		Browse	
		OK	L Compat	11-1-		
		ОК	Cancel	Help		

Figure 2-6 Import / Export Tabs

Import / Export Tabs – Used to manage locations for import and export of files.

Figure 2-7 Toolbar Tab

Toolbar Tab – Used to modify menu locations – changes made may make it more difficult when help is being provided via phone.

🔯 User Preferences	
General Window Settings Entry Defaults Inquiry Item Sort Order C Item Description Prop. Line C Item Code	Import Export Toolbar Inquiries
Save Quick Queries Selections	Reset Settings
ок	Cancel Help

Figure 2-8 Inquiries Tab

Inquires Tab – Used to change the default sort order of selected Inquiries

3. General Information

3.1 District number error message

District number error message experienced during the loading or updating of a contract (see figure 3-1).

Error		THO.	Incode only 3/10/2003	×
	The district number (2) of the contract(s) that you are import your FieldManager database.	ing does not match	the district number (1) assig	gned to
1	ОК			

Figure 3-1 – District Number Error

Navigate to the **Utilities** button at the top of your FieldManager window - down to **System Management** – over then down to **System Configuration**. This will open the System Configuration window (see figure 3-2). In the System Configuration window navigate to the **District Number** box and delete the number located inside and click **OK**. You will now be able to **Process** the FieldNet message that aborted. This error will occur each time a user loads or updates a contract that has a different district number from the last file imported/processed as the field is automatically populated during the import/update process.

🔯 System Configuration		X
General FieldNet		
District Number: 5 Delete	Reference File Creation Date: 02/08/10 13:14:06 Reference File Import Date: 03/09/10 gency Configuration Creation Date: 07/13/09 14:40:06 Agency Configuration Import Date: 11/05/09 09:02:12	
Shared Directories		
Inbox Location: c:\fieldmgr\lnbox Outbox Location: c:\fieldmgr\Outbox		
Contract Archive Location: C:\fieldmgr\Archive	1	
ОК	Cancel Help	

Figure 3-2 – System Configuration Window

3.2 Reference Data Update Message

ct ID In	nporting contract 015096.00	ce Comments	Closed	Acce
			No	Read-only 2/
)			No	Read-only 2/
	89%		No	Working
)			No	Read-only 12
			NIA.	Marking
Erro	or			Iy 3/
	Item 534.75 SpecYr.90 was not found in the itemli It is used for the Contract Item - Project : 015096 It is recommended that you import the latest refer	5.00, Cat. : 0001, Line : 0350, Ty		and a second
-	Import Canceled.			

New reference data required message (see figure 3-3).

If you receive a message similar to the one shown in figure 3-3 while processing an incoming FieldNet mail message or importing a contract you then must:

Navigate to the **Utilities** button at the top of your FieldManager window – down to **FieldNet** - over then down to **Request Reference Files from FieldNet**. Click the **FN Mailbox** button at the top of your FieldManager window then click **Send Outbox**. After this has been done wait about 10 minutes for the FielNet system to process your request and then click the **Get Mail** from your FieldNet mailbox window and Process (double click) the incoming message to update your system with the new reference information (if you did not receive any incoming mail try again getting mail again in a few minutes). Once that has been done, you will be able to Process (double click) the FieldNet mail message that aborted or contract import that aborted and gave you the error message.

3.3 Subcontractors – Having Subs Added to the FM Database

Subcontractors are added by the Contracts section in Augusta directly into the Transport system as they are received and the subcontract documentation is approved. If a subcontractor needs to be added to your contract please contact Mike Babb (624-3514 or Mike.Babb@maine.gov) for information regarding entry status. Do **NOT** add subcontractors within the FieldManager software as this will create duplicate entries in the system. Subcontractors should not be allowed to perform work on a project until the subcontract documentation has been submitted, reviewed and approved by the contracts section.

You can refresh the contract so that the most recent list of subcontractors will show up in your FieldManager contract. To do this - Navigate to the **Utilities** button at the top of your FieldManager

window – down to **FieldNet** - over then down to **Request Contract Refresh from FieldNet**. Choose the appropriate PIN number from the drop down box and then Click Send Request – this places the request in your FieldNet outbox. You will then need to Click the **FN Mailbox** button at the top of your FieldManager window then click **Send Outbox**. After this has been done wait 10-15 minutes for the FielNet system to process your request and then click the **Get Mail** from your FieldNet mailbox window and Process (double click) the incoming message to update your system with the most up to date contract information (if you did not receive any incoming mail try again getting mail again in a few minutes).

3.4 Database Backup – Safety Net Incase of a Lost, Stolen or Crashed Computer

It is a good practice to backup your database on a regular basis to help guard against the loss of information in the case of a lost, stolen or crashed computer. A good routine to get into is backing up the database to an external network drive or flash drive after each estimate or contract modification has completed.

This is done by going to File and then down to Backup Database. This will open a Backup Database window that shows any previous backups that have been saved. The backups that are shown are located on your machine (in c:\fieldmgr\Database\Backup\) and are not external.

Backup Date	Backup File Name	Backup Size	Original File Name
Ved, Mar 10,2010, 4:04 PM	c:\fieldmgr\Database\Backup\201003	9,587,799	c:\fieldmgr\database\field
ue, Feb 9,2010, 10:11 AM	c:\fieldmgr\Database\Backup\201002	9,196,581	c:\fieldmgr\database\fieldi
Ion, Dec 28,2009, 12:47 PM	c:\fieldmgr\Database\Backup\200912	6,039,195	c:\fieldmgr\database\field
ue, Dec 15,2009, 8:59 AM	c:\fieldmgr\Database\Backup\200912	1,442,317	c:\fieldmgr\database\old\l
ri, Dec 4,2009, 10:24 AM	c:\fieldmgr\Database\Backup\200912	2,622,641	c:\fieldmgr\database\fieldi
¢			

Click the Backup button to save the new database backup file to your machine. If you have any windows open within FieldManager you will receive the message below - if so click Yes so that the windows will be closed and the backup can begin.



When the backup to your machine has completed you will receive the following message.



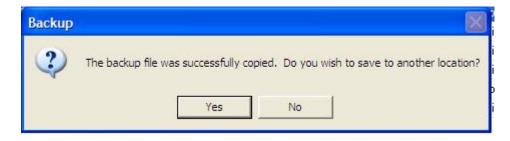
After clicking OK another message will appear asking if you would like to copy the backup to additional locations.



After clicking Yes the following window will appear

Select Backup File	Name		? 🛛
Save in: Backup		- 🗢 🔁	
20091204.BK 20091215.BK 20091228.BK 20100209.BK 20100310.BK 20100311.BK	20100311.BK2 20100311.BK3		
File name: 20100	311.BK3		Save
Save as type: All Files	s (*.*)	-	Cancel

In this window navigate to the network or flash drive location using the dropdown located at the top. You can either leave the default file name that the FieldManager software assigns (year, month, day) or give it a unique name that you can use to identify the backup. After clicking save the following message will appear



You can either click Yes and copy the backup to another location or click No to end the process.

4. Contract Load and Setup

Residents will need to email Rebecca Snowden and Guy Berthiaume to let them know so that the files can routed to the correct person after the contract has been awarded.

4.1 Loading Contracts from Augusta

The contract will be assigned in Augusta to a FieldNet user ID – once this has been done the FieldNet user will have to navigate to the **FN MailBox** from within FieldManager and then click **Get Mail**. After the incoming mail has been received the user must then **Process** the message by double clicking on it. After the mail message containing the contract has been processed the new contract will appear in the Contracts List Window and you are now ready to begin documenting your project.

Note: See section 3. General Information (pages 6-8) for common error messages related to contract import.

4.2 Viewing the Contracts List Window

The Contracts List Window automatically displays when FieldManager software is first opened (see Figure 4-1). This window lists all the contracts that are currently loaded into FieldManager software and their status. Each row in the Contracts List Window represents either a working contract or a read-only copy of a contract. Among all computers running FieldManager software, there may only be one working copy of a contract.

On the Contract List Window the Access column displays the type of contract you have and the date it was created.

	mport-FB Export-FE	i Cont Status Filt	er Sort	MultCont I P	rint Refresh	FN MailBox				
	nd Contract ID:							F	ilter: <show all=""></show>	
2	Contract ID	Contra	act Descript	ion	Managin	g Office Comments	Closed	Access	Prime	Contractor
tors	09184.50	GILEAD, HIGHW			Highway Prog		No	Read-only 2/18/2010	K & K EXCAVATION, INC.	
. 0	09184.60	GILEAD, HIGHWA	Y RECONS	TRUCTION	Highway Prog	ram	No	Read-only 2/18/2010	K & K EXCAVATION, INC.	
0	11090.00	HARPSWELL, BR	RIDGE REHA	BILITATION			No	Working	CPM CONSTRUCTORS	
0	12658.00	LIMINGTON, BRI	DGE REPLA	CEMENT			No	Read-only 12/22/2009	N F LUCE, INC.	
0	12694.00	HOLLIS, CULVER	RT REHABIL	ITATION			No	Working	KNOWLES INDUSTRIAL	SERVICES C
0	13022.10	STATEWIDE, TRU	JSSES AND	SIGNS			No	Read-only 3/2/2010	LIDDELL BROTHERS, IN	C.
0	14806.00	PORTLAND, HIG	HWAY RESU	REACING			No	Read-only 12/17/2009	PIKE INDUSTRIES, INC.	
als 0	15638.00	BEAVER COVE, B	BRIDGE REP	LACEMENT			No	Working	N F LUCE, INC.	
0.	15846.00	FARMINGTON-ST	FRONG, HIG	HWAY RESUR			No	Working	SEALCOATING, INC.	
oiles O	15961.04	REGION 4, CRAC	K SEALING				No	Working	NICOM COATINGS CORF	9 m
tes Eds pts										
tes ods pts										
tes Eds pts										
tes ods pts										
lods pots										
notes Mode Repte										
ates Agds Rpts										

Figure 4-1 Contract List Window

4.3 Adding and Changing General Information – Minimum Required for Estimates and Contract Modifications

Once a contract has been imported into FieldManager, general contract information such as Resident - name, Project Manager - name, Program Manager - name, Managing Office, Contract Modification signature block information etc. will need to be entered. General information can be added or modified by either double clicking on the contract or highlighting the contract from the Contract List Window and then clicking on the **DOCU** icon (located in menu on left). After this has been done a new window will appear with the following tabs; **General**, **Site Times**, **Breakdown**, **Site Events**, **R/O Distribution** and **Attachments**.

FieldManager software opens the **Change Contract Documentation** tab window with the **GENERAL** tab displayed (see Figure 4-2). Within this window you should enter **Project Engineer** (Project Manager's name), **Resident Engineer** - name, **Managing Office Manager** (Program Manager's name), **Managing Office** (Program), **Construction Start** date, **Construction Complete** date and **Contract Level Settings**. Before an estimate can be created the **Managing Office** field will need to be filled in with the Program name (Highway, Bridge, Traffic, Multimodal etc.). The names entered into the **Project Engineer** (Project Manager), **Resident Engineer** (Resident), and **Managing Office Manager** (Program Manager) fields are used in various locations throughout FieldManager – most importantly for Contract Modification signature pages.

To make changes to the **Contract Level Settings** click the button labeled as such in the **General** Tab. This will open a new **Contracts Level Settings** window (see Figure 4-3). Within this window you will see the following tabs; **General**, **Estimates** and **Cont Mod Signatures**. In the **General** tab the **Report Item Sort Oder** section should have the **Prop. Line** checked and also a check beside **Group Items by Project/Category**. Under the **Estimates** tab the user can add and change signature blocks for estimates if desired. In the **Cont Mod Signature** tab the user can modify the signature blocks that appear on the contract modifications so that the proper signatures can be acquired. Make sure that the **Include FHWA Block** has been checked.

Note: Each time that you have finished entering information in one of the tab sections it is a good idea to click the **Save** button on the top menu so that the information is not lost in case of a system interruption. Once you have finished entering the information in all of the tab sections you can then click **Save/Close** on the top menu. This will save your work and close the **Change Contract Documentation** tab window bringing you back to the **Contracts** List window.

챻 Field/	Manager (Contract: 014407.00)	
File Edit	View Utilities Window Help	
Cļose	🖹 🗐 📴 - 🐓 🖳 🎝 🔫 Sver/Close Svre Cont Status SpellCheck Print Refresh FN MuliBox	
Dogu	Image Contract Documentation (Contract: 014407.00) General Site Times Breakdowns Site Events Attachments	
€ Cogtractors I©Rs © Diagies	Projects: 014407.00, 014408.00, 014409.00 Awarded Cont. Amt: \$593,397.50 Current Cont. Amt: \$599,022.50 % Complete(awrd): 0% % Complete(curr): 0% Location: THREE PROJECT LOCATIONS ON RTE. 108. Route: 108 Prime Contractor: PRATT & SONS. INC.	
jtems Materials	Project Engineer: YOUR PM SIGNING CONTRACT MODS Resident Engineer: YOUR NAME Managing Office Manager: YOUR PROGRAM MANAGER Managing Office:	
Stockpiles	Managing Office Comments:	
Cont Mods	Notice To Proceed Date: 10/20/2010 Image: Construction Started Date: 00/00/0000 Image: Construction Started Date: 00/00/0000 Image: Contract Closed: C Yes No Closed To Traffic Date: 00/00/0000 Image: Contract Closed: C Yes No Open To Traffic Date: 00/00/0000 Image: Contract Closed: C Yes No	
? O Inguiries	All Contract Work Completed: 00/00/0000 🔛 View IDR Attachments in FieldBook for 14 days	
	Traffic Comments:	
Ready		Trainning

Figure 4-2 Change Contract Documentation Window

😨 FieldManager (Contract: 014407.00)	🖃 🖻 🔀
File Edit View Utilities Window Help	
Close Save/Close Save Cont Status SpellCheck Print Refresh FN MailBox	
Cjose Save/Close Save ContStatus SpellCheck Print Refresh FN MailBox	
Rows 1 to 8 of 8	Trainning

Figure 4-3 Contract Level Settings Window

4.4 Site Times, Breakdown, Site Events, R/O Distribution and Attachments

No information is required within these tab fields for minimum requirements

The *Site Times* tab should be left blank – dates that are entered in this area can cause automated liquidated damages to be assessed incorrectly to the contractor when estimates are passed through the Transport system in Augusta.

The *Breakdown* tab is not used.

The *Site Events* tab may be used for record keeping purposes at the users discretion to keep track of major events throughout the contract – ie. winter shutdown, detours, PIN completion, etc.

The *R/O Distribution* tab for FieldNet contracts is not used at this time. FieldNet id's can be entered into the Regular Read-Only List (right window) so that a read-only copy of the contract is sent to that person each time an estimate is generated. This options use is likely to become active when the FieldNet system becomes available to Consultant personnel.

The *Attachment* tab can be used but care should be made when doing so. Keep in mind that attachments will greatly increase the size of the database making it difficult to transfer the file later or when it is required. All attachment should be done in pdf format when possible.

5. Working with Items

FieldManager contracts contain two types of items **Original** and **Change Order**. **Original** items are those items which are associated with the original schedule of items at bid opening. Items that are added by contract modifications are referred to as **Change Order** items.

5.1 Viewing the Properties of all the items

The Item icon (left menu) will produce a window list of all items associated with a contract. Some of the Item properties that can be viewed using the item icon are authorized units, unit price, quantity placed, amount paid and whether it's an original item or change order item (see figure 5-1).

😕 🛋 🖄 🔎 🗃		<mark>↓2</mark> r Sort	Print Refre						
🔯 Items (Contract: 014407.00)									
Project: <all> Category: <a< th=""><th>. > 👻</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></a<></all>	. > 👻								
Contractor: <all></all>		•							
Find Item Code:							Filter: <show< th=""><th>All></th><th>•</th></show<>	All>	•
This item code.	T	Item	Prop.	Quantity	Quantity	Authorized	Initial	Pending	U
Item Description	Units	Code	Line	Placed	Paid	Quantity	Quantity	Changes	Pri
CLEARING	AC	201.11	0010	0.000	1.340	1.400	1.400	0.000	\$5,000
REMOVING SINGLE TREE TOP ONLY	EA	201.23	0020	0.000	6.000	6.000	6.000	0.000	\$250
REMOVING STUMP	EA	201.24	0030	0.000	2.000	6.000	6.000	0.000	\$180
COMMON EXCAVATION	CY	203.20	0040	0.000	4,532.000	8,805.000	8,805.000	0.000	\$8
ROCK EXCAVATION	CY	203.21	0050	0.000	2,172.030	2,940.000	2,940.000	0.000	\$41
AGGR SUBB COURSE - GRAVEL	CY	304.10	0060	0.000	2,212.000	3,385.000	3,385.000	0.000	\$20
HOT MIX ASPHALT 19.0 MM HMA	Т	403.207	0070	0.000	0.000	950.000	950.000	0.000	\$83
HOT MIX ASPHALT 9.5 MM (INCIDENTALS)	Т	403.209	0080	0.000	0.000	115.000	115.000	0.000	\$110
HOT MIX ASPHALT 9.5 MM	Т	403.210	0090	0.000	0.000	480.000	480.000	0.000	\$84
HOT MIX ASPHALT 12.5 MM BASE	Т	403.213	0100	0.000	0.000	490.000	490.000	0.000	\$84
BITUMINOUS TACK COAT - APPLIED	G	409.15	0110	0.000	0.000	315.000	315.000	0.000	\$9
UNTREAT AGGR SURF CRS, TR MEAS	CY	411.10	0120	0.000	0.000	15.000	15.000	0.000	\$47
STR CONC ROADWAY MEDIAN	CY	502.341	0130	0.000	0.000	29.000	29.000	0.000	\$460
15" CULV PIPE OPTION I	LF	603.16	0140	0.000	162.000	180.000	180.000	0.000	\$25
18" CULV PIPE OPTION III	LF	603.179	0150	0.000	0.000	90.000	90.000	0.000	\$32
ADJUST MANHOLE OR CB TO GRADE	EA	604.18	0160	0.000	0.000	1.000	1.000	0.000	\$675
15" UNDERDRAIN TYPE C	LF	605.12	0170	0.000	0.000	150.000	150.000	0.000	\$44
UNDERDRAIN DELINEATOR POST	EA	606.356	0180	0.000	0.000	3.000	3.000	0.000	\$47
SINGLE WOOD POST	EA	606.47	0190	0.000	0.000	5.000	5.000	0.000	\$47
CURB TYPE 3	LF	609.31	0200	0.000	0.000	120.000	120.000	0.000	\$10
PLAIN RIPRAP	CY	610.08	0210	0.000	3.430	395.000	395.000	0.000	\$27
EROSION CONTROL BLANKET	SY	613.319	0220	0.000	378.100	500.000	500.000	0.000	\$1
LOAM	CY	615.07	0230	0.000	0.000	75.000	75.000	0.000	\$50
SEEDING METHOD NUMBER 1	UN	618.13	0240	0.000	0.000	35.000	35.000	0.000	\$15
MULCH	UN	619.12	0250	0.000	0.000	35.000	35.000	0.000	\$14

Figure 5-1 Item Window

To determine all the information that is associated with an item, click on the **Item** icon. This will list all the items and its properties associated with the contract. If there is more than one PIN, you must select the PIN next to the project dialog box and then the appropriate category.

Items can also be sorted in a variety of different formats, this is performed by selecting the **Sort** icon and then selecting from the options, the format you would like the items to be viewed.

A useful tool of the **Item** icon is that it can be used to view all the documentation and postings for a particular item. To view all the postings associated with a specific item, place the cursor over the desired item and right click. Next, place the cursor over **Inquiries**, and then click on the **Items Posting by Item**. This will let you view all the posting that are associated with this item.

It should be noted, that the **Add Item** and **Delete Item** options that are available when you perform a right click on an item should **NEVER** be used. These operations can **ONLY** be done through the contract modification process.

5.2 Changing and Adding Contractors Associated with an Existing Item

To change an item's existing contractor documentation, select the contract to which the item is assigned from the **Contracts List Window**, and click **Items** on the **Application Toolbar** to display the **Items List Window**. Select the item by double clicking on it to display the **Change Item Tab Window**. Click the **Contractors** tab (see figure 5-2).

뜧 Field/	Manager (Contract: 014407.00)		- 6 🛛
File Edit	View Utilities Window Help		
Cjose	Image: System Image: S		
Dogu Dogu Q Contractors	Review Item (Item: CLEARING) (Contract: 014407.00) General Documentation Materials Breakdowns Contractors Item: 201.11, CLEARING Prop. Ln: 0010 Unit: AC Auth. Qty: 1,400 Auth. Amt: \$7,000.00		
≧ I <u>D</u> R≠	Type: ORIGINAL ITEM Unit Price: \$5,000.000 Qty. Placed: 0.000 Pending Chgs: 0.000 Qty. Paid: 1.340 Item Contractors		
Diagies	Contractor Name Vendor PRATT & SONS, INC. 000403		
Materials Stockpiles			
Estimates Cont Mods			
Misc Rpts			
Inguiries			
	Contractor: PRATT & SONS, INC. Remarks:		
	Add Contractor Delete Contractor		
Rows 1 to	lof 1	Trainning	admin

Figure 5-2 Change Item Window

You can add any additional contractors to an existing item by clicking **Add Contractor** and choosing one from the list of contractors displayed. **Figure 5-3** displays an existing item with multiple contractors associated with it.

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	Contractor: JEAN CASTONGUAY LOGGING & EXCAVA	TION, INC.					
	Remarks:	×					
	Nethanks.						
		<u>~</u>					
		Add Contractor Delete Contractor					
Rows 1 to (5 of 6		Trainning				

Figure 5-3 Change Item Window – Multiple Contractors Associated

Click either **Save** or **Save/Close** on the **Window Toolbar** depending on how you would like to proceed.

5.3 Deleting Contractors Associated with an Existing Item

To delete contractors associated with an existing item, select the contract to which the item is assigned from the **Contracts List Window**, and click **Items** on the **Application Toolbar** to display the **Items List Window**. Select the item, and click **Review** on the **Window Toolbar** to display the **Review Item Tab Window**. Click the **Contractors** tab. Select the contractors to be removed and click **Delete Contractor** (this only removes the contractor from the item, not the contract) at the bottom of the window. FieldManager software displays a **Delete Warning** window that confirms the deletion (see Figure 5-4).

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	Contractor: JEAN CASTONGUAY LOGGING & EXCAVATION, INC.
	Remarks:
	Add Contractor Delete Contractor
Rows 1 to	of 6 Trainning admin

Figure 5-4 Delete Warning Window

. Note: There must be at least one contractor assigned to every item. The user will not be able to save if there are no contractors listed in the contractors tab.

6. Generating an IDR (Inspector's Daily Report)

An IDR (Inspector's Daily Report) tracks all the activity at the project site on a particular day. IDRs can be created in FieldBook or FieldManager software. You can enter general information, contractor personnel and equipment, item posting, and add attachments.

By clicking on the **IDRs** icon a list window will appear with all the **IDRs** that have been created to date. To display the **IDRs List Window**, select a contract in the **Contracts List Window**, and click the **Idrs icon** on the **Application Toolbar** (see Figure 6-1).

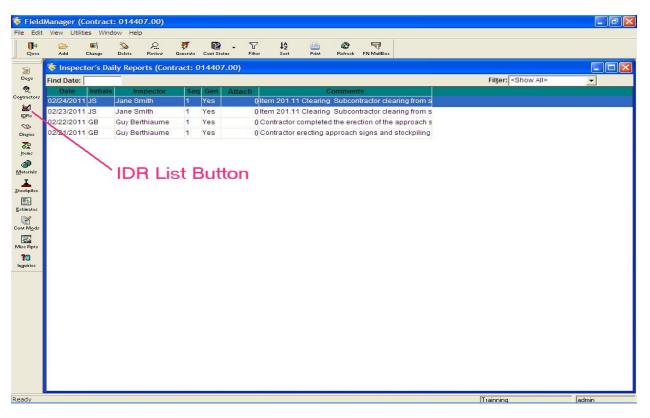


Figure 6-1 Inspectors Daily Reports List Window

6.1 Adding a New IDR (Inspector's Daily Report)

A new **IDR** may be added via the **IDRs List Window** by completing the appropriate tabs in the **Add IDR Tab Window**. You can also create a new **IDR** by copying an existing **IDR** and then changing appropriate information in the tab window. (see Section 6.7 for more information about copying an existing IDR).

Note: Adding an **IDR** is a multi-step process. If you only require information about a specific step in the process, this section offers that information along with the navigational path to follow. If you are working through the process from the beginning, however, be sure to remain in the Add IDR tab window throughout, disregarding the navigational path at the beginning of each subsequent step, and clicking **Save** rather than **Save/Close** upon completing each step.

6.2 Adding General Information for a New IDR

The **General** tab of the **Add IDR** tab window records all the general information that makes up an inspector's report. To add general information for a new IDR, select the appropriate contract in the **Contracts List Window**, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Click **Add** on the **Window Toolbar** to open the **Add IDR** tab window. The **General** tab will automatically display (see Figure 6-2).

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n n n n n n n n n n n n n n n n n n n	Date/Time Entered: 03/02/2011 Revised By: Entered By: John Doe Revision Date: Sequence Number: Revision Number: Generated: No	
Siagies	IDR Date: 03/02/2011 🔛 Inspector: JD John Doe	
Materials Stockpiles	Weather: Low Temperature: F ° C High Temperature: F ° C	
Estimates Cont Mods	Comments:	
Misc Rpts		
Rows 1 to	4 of 7 Trainnin	iq doe

Figure 6-2 Add IDR Window

To create a complete IDR, information must be entered in the following fields; **IDR Date**, **Inspector**, **Weather**, **Low Temperature**, **High Temperature** and **Comments**.

As information becomes available, FieldManager software automatically enters information in the following fields at the top of the tab window; Date/Time Entered, Entered By, Sequence Number, Generated, Revised By, Revision Date and Revision Number,

Click either Save or Save/Close on the Window Toolbar depending on how you would like to proceed.

6.3 Adding Contractor Personnel to a New IDR

The **Contractors** tab shows the **Prime Contractor** and all the **Subcontractors** who are associated with the contract. This is where overhead information about prime contractors and subcontractors is entered for the time period covered by the IDR.

To add contractor personnel to a new IDR, select the appropriate contract in the **Contracts List Window**, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Click **Add** on the **Window Toolbar** to open the **Add IDR** tab window, and then click the **Contractors** tab (see Figure 6-3).

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Dogu	Openeral Contractors Site Times Postings Attachments View	
Contractors	On Stre Contractors (Prime Contractor is in Italicized Bold) Vendor No. BRUCE A. MANZER, INC. 001253 JEAN CASTONGUAY LOGGING & EXCAVATION, INC. 000850 L&D SAFETY MARKING CORPORATION 000577 MAINE DRILLING & BLASTING, INC. 000290	
jtems Materials Stockpiles	Personnel Number Hours Equipment Number Hours	<u> </u>
Estimates Cont M <u>o</u> ds Misc Rpts		
?O Inguiries		
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Figure 6-3 Add IDR Window – Contractors Personnel and Equipment

Select the prime contractor or a subcontractor from the **Prime/Subcontractor** list. To state the contractor was on site, click in the **On Site** check box next to the name of the contractor. A check mark in the box indicates the contractor worked that day. A blank On Site check box indicates the contractor did not work.

Click **Add Personnel** at the bottom of the **Add IDR** tab window. As shown in Figure 6-4, FieldManager software displays a row in the **Personnel** box in which to enter the name or type of worker, the number of workers, and the hours of work each performed that day.

	ieldManager (Contract: 014407.00)	
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Power 1 to r		Transie

Figure 6-4 Add IDR Window – Contractors Personnel and Equipment

Enter the personnel name or type, and then press the **TAB** key to navigate to the other fields to finish the entry.

Once **Personnel** and **Equipment** options have been added to an IDR these choices will carry forward to IDR's created later so that it will not be necessary to re-enter this information.

Click either Save or Save/Close on the Window Toolbar depending on how you would like to proceed.

6.4 Adding Contractor Equipment to a New IDR

The **Contractors** tab shows the prime contractor and all the subcontractors who are associated with the contract. This is where overhead information about contractors and subcontractors is entered for the time period covered by the IDR.

To add contractor equipment to a new IDR, select the appropriate contract in the **Contracts List Window**, and click **IDRs** on the **Application Toolbar** to display the **IDRs** list window. Click **Add** on the **Window Toolbar** to open the **Add IDR** tab window, and then click the **Contractors** tab (see Figure 6-5).

Select the prime contractor or a subcontractor from the **Prime/Subcontractor** list. To state the contractor was on site, select the On Site check box next to the name of the contractor. A check mark

in the box indicates that the contractor worked that day. A cleared On Site check box indicates the contractor did not work.

Click **Add Equipment** at the bottom of the tab window. As shown in Figure 6-5, FieldManager software displays a row in the **Equipment** box in which to enter the name or type of equipment, the number of equipment used, and the hours it was used per day.

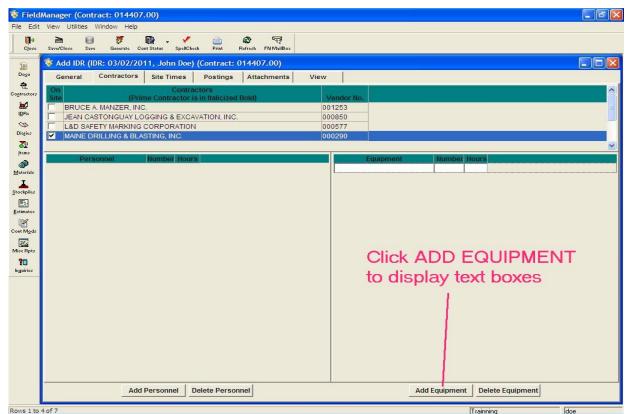


Figure 6-4 Add IDR Window – Contractors Personnel and Equipment

. Note: Usually you will not enter a value in the Hours box unless it is to record personnel for a force account. See Appendix A for more information about force accounts.

Enter the name of the equipment in the **Equipment** box, and then press the **TAB** key to navigate to the other fields to finish the entry.

Once Personnel and Equipment options have been added to an IDR these choices will carry forward to IDR's created later so that it will not be necessary to re-enter this information.

Click either Save or Save/Close on the Window Toolbar depending on how you would like to proceed.

6.5 Adding Item Postings to a New IDR

The vast majority of additions to IDRs are item postings. Inspectors use IDRs to report progress on a contract, with item usage as the measure of all work completed.

The **Postings** tab lists all the item postings for the IDR. To add item postings to a new IDR, select the appropriate contract in the **Contracts List Window**, and click the **IDRs** on the **Application Toolbar** to display the **IDRs** list window. Click **Add** on the **Window Toolbar** to open the **Add IDR** tab window, and then click the **Postings** tab.

Click **Add Posting** at the bottom of the window and a display of the **Contract Items List Window** from which to select the item to which progress will be posted (see figure 6-6).

					_					
nd Item Code: Filter: <show all=""></show>										
	Item Description	Units	ltem Code	Prop. Line	Quantity Placed	Quantity Paid	Authorized Quantity	Initial Quantity	Pending Changes	Ui <u>^</u> Pr
LEARIN		AC	201.11	0010	0.000	1.340	1.400	1.400	0.000	
	IG SINGLE TREE TOP ONLY	EA	201.23	0020	4.000	6.000	6.000	6.000	0.000	\$250
	IG STUMP	EA	201.24	0030	0.000	2.000	6.000	6.000	0.000	\$180
	I EXCAVATION	CY	203.20	0040	0.000	4,532.000	8,805.000	8,805.000	0.000	\$E
	CAVATION	CY	203.21	0050	0.000	2,172.030	2,940.000	2,940.000	0.000	\$41
	JBB COURSE - GRAVEL	CY	304.10	0060	0.000	2,212.000	3,385.000	3,385.000	0.000	\$20
		Т	403.207	0070	0.000	0.000	950.000	950.000	0.000	\$83
	ASPHALT 9.5 MM (INCIDENTALS)		403.209	0080	0.000	0.000	115.000	115.000	0.000	\$110
		Т	403.210	0090	0.000	0.000	480.000	480.000	0.000	\$84
		T	403.213	0100	0.000	0.000	490.000	490.000	0.000	\$84
	OUS TACK COAT - APPLIED	G	409.15	0110	0.000	0.000	315.000	315.000	0.000	\$S
	T AGGR SURF CRS, TR MEAS	CY	411.10	0120	0.000	0.000	15.000	15.000	0.000	\$47
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	/ PIPE OPTION I	LF	603.16	0140	0.000	162.000	180.000	180.000	0.000	\$25
8" CUL\	PIPE OPTION III	LF	603.179	0150	0.000	0.000	90.000	90.000	0.000	\$32
DJUST	MANHOLE OR CB TO GRADE	EA	604.18	0160	0.000	0.000	1.000	1.000	0.000	\$675
5" UNDI	ERDRAIN TYPE C	LF	605.12	0170	0.000	0.000	150.000	150.000	0.000	\$44
INDERD	RAIN DELINEATOR POST	EA	606.356	0180	0.000	0.000	3.000	3.000	0.000	\$47
INGLE	WOOD POST	EA	606.47	0190	0.000	0.000	5.000	5.000	0.000	\$47
URB TY	PE 3	LF	609.31	0200	0.000	0.000	120.000	120.000	0.000	\$10
LAIN RI	PRAP	CY	610.08	0210	0.000	3.430	395.000	395.000	0.000	\$27
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Figure 6-6 Item Selection Window for Postings

Filter and sort the **Contract Items List Window** just as with any other list window. Choose the item to post to either by double-clicking it, or by clicking the item and then clicking **Select**. Another helpful navigational tool is the **Find Item Description** text box. To quickly advance to a record, simply begin keying the item description in the **Find Item Description** text box, and the list will jump to that point. Once an item is chosen, FieldManager software displays the status area and entry area for that item (see Figure 6-7).

	Manager (Contract: 014407.00)	- 7 ×
0.	View Utilities Window Help	
Cjose Dogu Rogu Constractors	SwedClose Save Generate Item Doc Contracts SpallCheck Print Refresh FN MulBox Add IDR (IDR: 03/02/2011, John Doe) (Contract: 014407.00) General Contractors Site Times Postings Attachments View Item: 201.23, REMOVING SINGLE TREE TOP ONLY Prop. Ln: 0020 Unit: EA Catg. Auth. Qty: 2.000 Catg. Auth. Amt: \$500.00 Type: ORIGINAL ITEM Unit Price: \$250.000 Catg. Qty. Placed: 4.000 Catg. Pending Chgs: 0.000 Catg. Qty. Placed: 4.000 Unit Price: \$250.000 Catg. Qty. Placed: 4.000 Catg. Pending Chgs: 0.000 Catg. Qty. Placed: 4.000 Unit Price: \$250.000 Catg. Qty. Placed: 4.000 Desting Refresh FN MulBox	
Jeans Jeans Materials Estimates Estimates Cont Mads Misc Repts Naguiries	Category: 0001 PROJECT ITEMS Contractor: PRATT & SONS, INC. Quantity: 2.000 EA Attention: Station From: Breakdown: Station To: Remarks: See Remarks this IDR = if information related to item is on IDR Location: Station 100+20 rt Station 102+56 It Book ? Page ? = if information related to item is in book	
Ready	Materials OK Add More Cancel	Add Materials Add Breakdowns

Figure 6-7. Item Posting Information Window

Enter information in the following fields to complete the IDR: Contractor, Project. Category, Quantity, Station From, Station To, Location and Remarks.

To enter additional postings, click **Add More** at the bottom of the window and repeat the process of posting to an item.

Click **Ok** to accept the posting, or **Cancel** to cancel it. FieldManager software will return to the posting list.

Click either Save or Save/Close on the Window Toolbar depending on how you would like to proceed.

6.6 Viewing the New Inspector's Daily Report

An IDR has draft status until it has been generated. It is a good idea to use the **View** tab to check the information on a draft IDR prior to generating it; however, the **View** tab may also be used at any time while creating an IDRs.

To view a draft IDR, click the **View** tab of the **Add IDR** tab window to see the electronic copy of the report that will print out when you generate the IDR (see Figure 6-8).

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<u>.</u>	JS Jane Smith	HP-1440(700)X	None	
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t Mods	Entered By Revised By		Revision No.	
ac Rpts	S/A, Maine Department of Transportation JD, John Do Temperatures	e 3/2/2011 1:27 PM Weather	1	
0	Low: °F High: °F	Mostly sunny		
quiries	Comments	(9) §C		
	Item 201.11 Clearing			
	Subcontractor clearing from staiton 100+50 to 500+25 right. All we	ace for later		
	removal. Work time - 7:00 am to 5:00 pm, 30 minute lunch Item to be posted for payment after material has been removed			
	Item 201.23 Removing Single Tree Top Only			
	Subcontractor removing trees at stations 101+40 left and 226+50 l			
	work. All wood stacked in place to be removed by the land owner a site and removed. Work time - 8:30 am to 3:15 pm, 30 minute lund			
	Item 652.34 Cones			
	First day of work with cones today - maximum set up today was 38			

Figure 6-8. IDR Draft View

If all the information is correct and you are ready to generate the IDR, refer to Section 6.15 of this document for further instructions. Otherwise, click either **Save** or **Save/Close** on the **Window Toolbar** depending on how you would like to proceed.

6.7 Copying IDR Information to a New Inspector's Daily Report

One of the biggest advantages to using fieldmager products is that the contractors often works with the same items for weeks at a time, you may document similar construction events by using the **Copy IDR** commands and save a lot of time.

To copy IDR information to a new IDR, select the IDR you want to copy in the IDRs List window and choose **Copy IDR** from the **Edit** menu or the right mouse button menu. FieldManager software displays a Warning message window.

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	🌾 Inspect	tor's Dai	ily Repo	orts (Con	tract: ()14407.00))								
ogu	Find Date:												Fil <u>t</u> er:	Show All>	•
ē I	Date	Initials		spector	Sec		ach			Commen					
	02/24/2011	C	Jane Sr		1	Yes						earing from s			
80	02/23/2011	1552	Jane Sr		1	Yes				Section 24		learing from s			
>	02/22/2011		1	rthiaume	1	Yes						ie approach s			
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Click **Yes** to confirm that you wish to copy the IDR. FieldManager software opens the **Add IDR** tab window and automatically copies this information to the new IDR. The copied IDR will have the current date and all the copied information with the original IDR. The new IDR will contain all the information from the General and Contractors Tabs. The Posting tab will copy all the item numbers, notes and references but will **NOT** copy the quantity to insure that a double posting doesn't result; the quantity in the new IDR will zero and remain zero until it is revised.

Finish creating the new IDR by making any necessary changes or additions to the copied information and clicking **Save**.

6.8 Changing Existing Inspector's Daily Reports

Often, field office personnel will find it necessary to change information submitted by field inspectors. It is possible to change the information in an existing IDR at any time. When you change a generated IDR, FieldManager software changes the IDR status to draft and the IDR must be generated again (changes can only be made in FieldManager – IDRs must be transferred from FieldBook).

6.9 Changing General Information for an Existing IDR

To change the general information for an IDR, select the contract for which the existing IDR was created from the **Contracts List Window**, and click **IDRS** on the **Application Toolbar** to display the **IDRs List Window**. Select the **IDR**, and click **Change** on the **Window Toolbar** to display the **Change IDR** tab window. The **General** tab will automatically display

You can change any of the fields on the **General** tab (see Section 6.2 for entry field descriptions). To change information, click in or press the **Tab** key to navigate to a field's text box to make the necessary changes.

Click **Save/Close** on the **Window Toolbar** to save your work and close the **Change IDR** tab window. FieldManager software will save the information and then revert to the **IDRs List Window**.

Note: To continue working in the **Change IDR** tab window, click **Save** rather than **Save/Close**. FieldManager software will save the information added and continue to display the **Change IDR** tab window, enabling you to work with other tabs. This same procedure applies to all tab windows in this section.

6.10 Changing and Adding Contractor Personnel for an Existing IDR

To change contractor personnel, select the contract for which the existing IDR was created from the **Contracts List Window**, and click IDRS on the **Application Toolbar** to display the **IDRs List Window**. Select the IDR, and click **Change** on the **Window Toolbar** to display the **Change IDR** tab window. Click the **Contractors** tab.

You can change any of the information in the **Personnel** text box. To change information, click in a text box and add or delete information. To add more personnel, click **Add Personnel**.

Click either Save or Save/Close on the Window Toolbar depending on how you would like to proceed.

6.11 Changing and Adding Contractor Equipment for an Existing IDR

To change contractor equipment, select the contract for which the existing IDR was created from the **Contracts List Window**, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Select the **IDR**, and click **Change** on the **Window Toolbar** to display the **Change IDR** tab window. Click the **Contractors** tab.

You can change any of the information in the **Equipment** box. To change information, click in a text box and add or delete information. To add more equipment, click **Add Equipment**.

Click either **Save** or **Save/Close** on the **Window Toolbar** depending on how you would like to proceed.

6.12 Deleting Contractor Personnel from an Existing IDR

To delete contractor personnel, select the contract for which the existing IDR was created from the

Contracts List Window, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Select the **IDR**, and click **Change** on the **Window Toolbar** to display the **Change IDR** tab window. Click the **Contractors** tab.

Select the row to delete in the **Personnel** box, and click **Delete Personnel** at the bottom of the window. Click **Yes** to delete the personnel, or **No** to cancel the deletion. If this Personnel type is going to be used in future IDRs it is not necessary to delete the row but instead place the quantity at zero.

Click either Saves or Save/Close on the Window Toolbar depending on how you would like to proceed.

6.13 Deleting Contractor Equipment from an Existing IDR

To delete contractor equipment, select the contract for which the existing IDR was created from the Contracts list window, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Select the **IDR**, and click **Change** on the Window Toolbar to display the **Change IDR** tab window. Click the **Contractors** tab.

Select the row to delete in the **Equipment** box, and click **Delete Equipment** at the bottom of the window. Click **Yes** to delete the equipment, or **No** to cancel the deletion. If this Equipment type is going to be used in future IDRs it is not necessary to delete the row but instead place the quantity at zero.

Click either Save or Save/Close on the Window Toolbar depending on how you would like to proceed.

6.14 Changing and Adding Item Postings for an Existing IDR

To correct an item posting error, select the contract for which the existing IDR was created from the **Contracts List Window**, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Select the **IDR**, and click **Change** on the **Window Toolbar** to display the **Change IDR** tab window. Click the **Postings** tab (see Figure 6-9).

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Figure 6-9. IDR Postings Tab

To add an item posting, click **Add Posting** (see Section 6.5 for more information). To change a posting, select that posting and click **Change Posting** on the bottom of the window.

FieldManager software displays the **Postings** tab for only that item, and allows you to modify the information in any field. The only field that may at times be inaccessible is the **Quantity** field. This occurs when the quantity has been paid on an estimate. When this is the case, you will need to make a correcting entry on the **IDR**. If the **Quantity** field is available and you change it, it is necessary to review the associated materials.

Click **Ok** to display the posting listing on the **Postings** tab again, or click **Cancel** to return to the **Postings** tab without making any changes to the item posting. Click either **Save** or **Save/Close** on the **Window Toolbar** depending on how you would like to proceed.

6.15 Generating the Inspector's Daily Report

Once an **IDR** is correct and complete, generate it so that the item postings can be paid on the next estimate created in FieldManager software.

To generate an IDR, select the contract for which the IDR was created from the Contracts list

window, and click **IDRs** on the Application Toolbar to display the **IDRs List Window**. Select one or more **IDRs** to generate, and click **Generate** on the **Window Toolbar**.

Note: You can generate an **IDR** from the **IDRs List Window** or from any of the **IDR** tab windows while working in them.

FieldManager software displays a **Generate** window that identifies the **IDR** to generate (see Figure 6-10).

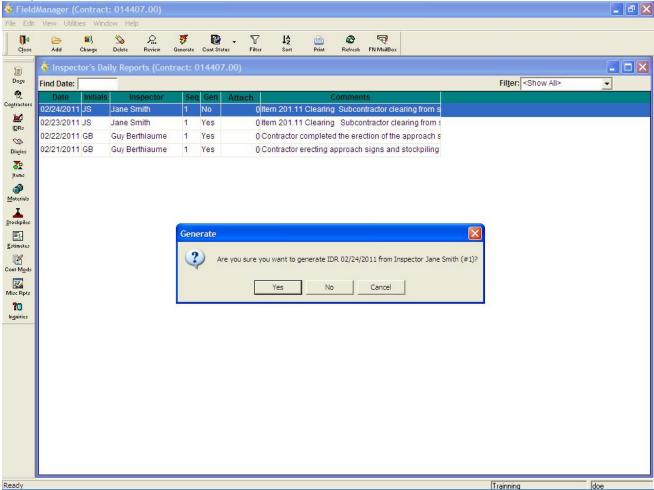


Figure 6-10. IDR Generate Message

Click **Yes** to confirm the generation or **Cancel** to cancel the generation. If you selected more than one IDR to generate, you can click **No** to cancel the generation of the **IDR** listed in the **Delete Warning** window and move on to the next selected IDR.

If you click **Yes**, FieldManager software takes a moment to generate the **IDR** and then displays the Print dialog box. Adjust the printer settings just as if you were printing a document from a word processing or spreadsheet program, and click **Ok**. FieldManager software prints the **IDR** report and marks the **IDR** as generated in the system.

Note: If you do not want to print the paper report, click **Cancel** in the **Print Dialog** box. Doing so will not cancel the generation; it will only cancel the printout of the report. To print the report later, select the **IDR** from the **IDRs** list window, click **Review** on the **Window Toolbar**, and then click **Print** on the **Window Toolbar**.

Click **Close** on the **Application Toolbar** to close the **IDRs List Window** and return to the **Contracts List Window**.

7. Working with the Daily Diary

The **Daily Diary** is a record of the activities on the contract sites for each day of the contract. The **Daily Diary** draws on information entered on **IDRs**. It is best to enter a **Daily Diary** record for each day of the contract. FieldManager software includes helpful functions to quickly and easily add or edit information for the **Daily Diary**.

After selecting the appropriate contract, click on the **Diaries** icon and a list of all the **Dairies** created for that contract. (see Figure 7-1).

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Figure 7-1. Daily Diary List Window

7.1 Adding a New Daily Diary Record

A new **Daily Diary** record may be added to a contract via the **Daily Diaries List Window** by completing the appropriate tabs in the **Add Daily Diary** tab window and then clicking generate icon.

7.2 Adding General Information for a New Daily Diary

To add general information for a new **Daily Diary** record, select the appropriate contract in the **Contracts List Window**, and click **Diaries** on the **Application Toolbar** to display the **Daily Diaries** list window. Click **Add** on the **Window Toolbar** to display the **Add Daily Diary** tab window. The **General** tab will automatically display (see Figure 7-2).

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Figure 7-2. Daily Diary General Tab

Enter values in the following fields:

The **Diary Date** will automatically display the current date; however, you can change this date if entering a record for a date in the past. Simply type in the new date or you can use the calendar feature.

The Author can be typed in or selected from a list of names, click the drop-down arrow next to the box.

The low and high temperatures can be typed or Click **Bring In Temperatures** at the bottom left of the **General** tab to quickly bring in temperature information from inspectors' reports for the **Diary Date** selected. This button will only be enabled if there is at least one **Generated IDR** from which to draw information. The lowest and highest temperatures recorded in any **Generated IDRs** with the same date will be brought into the temperature fields. A notation in blue print next to the **Diary Date** field indicates whether any inspectors' reports have been **Generated** for the date entered in the field. If there is a notation in red print next to the **Author Field**, it will list any **Ungenerated IDRs** for the **Diary Date** selected.

The **Sunrise** and **Sunset** times and **Weather** are required to be typed in. Be aware that clicking **Bring In Weather and Comments** will not automatically bring weather information into this field, but will fill the **Comments Field** instead and may overwrite any existing information that has already been typed there. The set up that MDOT uses automatically attaches a copy of any IDRs generated for the same date of the Daily Diary therefore there is no reason to **Bring In Weather And Comments** as it will only duplicate the information. Use the **Weather** field to summarize the weather for the day based on the inspectors' reports or Resident observations.

The **Comments** are required to include all the typical entries of a project diary and using item number when applicable.

Click **Save/Close** on the **Window Toolbar** to save your work and close the **Add Daily Diary** tab window. FieldManager software will save the information and then revert to the **Daily Diaries List Window**.

7.3 Site Time Information for a New Daily Diary

Maine DOT is not using this function within the FieldManager software. Information entered in the section can cause incorrect time charges to the contract. Please do NOT use this section.

7.4 Changing an Existing Daily Diary Record

To change the general information for an existing **Daily Diary** record, select the appropriate contract in the **Contracts List Window**, and click **Diaries** on the **Application Toolbar** to display the **Daily Diaries List Window**. Select the record to change, and click **Change** on the **Window Toolbar** to display the **Change Daily Diary** tab window. The **General** tab will automatically display. You can change any of the fields on the **General** tab except the fields in the status area.

Click **Save/Close** on the **Window Toolbar** to save your work and close the **Change Daily Diary** tab window. FieldManager software will save the information and then revert to the **Daily Diaries List** window.

7.5 Deleting a Daily Diary Record

To delete a **Daily Diary** record, select the appropriate contract in the **Contracts List Window**, and click **Diaries** on the **Application Toolbar** to display the **Daily Diaries List Window**. Select the record to delete, and click **Delete** on the **Window Toolbar**. FieldManager software displays a **Delete Confirmation** window that asks to confirm the deletion (see Figure 7-3).



Figure 7-3. Delete Confirmation

Click **Yes** to delete the **Daily Diary**, or **Cancel** to cancel the deletion. If you selected more than one **Daily Diary** record to delete, you can click **No** to cancel the deletion of the **Daily Diary** record listed in the **Delete Confirmation** window and move on to the next selected **Daily Diary**.

Click **Close** on the **Application Toolbar** to close the **Daily Diaries List Window** and return to the **Contracts List Window**.

7.6 Generating a Daily Diary Record

Once a **Daily Diary** record is correct and complete it should then be generated.

To Generate a Daily Diary record, select a contract from the Contracts List Window, and click Diaries on the Application Toolbar to display the Daily Diaries List Window. Select one or more Daily Diary records to generate, and click Generate on the Window Toolbar.

Note: You can generate a **Daily Diary** record from the **Daily Diaries List Window** or from any of the **Daily Diary** tab windows after you are finished working in them.

FieldManager software displays a **Generate** window that identifies the **Daily Diary** record to generate (see Figure 7-4).



Figure 7-4. Generate Confirmation

Click Yes to confirm the generation, or No to cancel the generation.

If the response is **Yes**, FieldManager software takes a moment to generate the **Daily Diary** record and then displays the Print dialog box. Adjust the printer settings just as if you were printing a document from a word processing or spreadsheet program, and click **Ok**. FieldManager software prints the report, and marks the **Daily Diary** record as generated in the system.

Note: If you do not want to print the **Daily Diary** Report, click **Cancel** in the **Print Dialog** box. Doing so will not cancel the generation, it will only cancel the printout of the report. To print the report later, select the **Daily Diary** from the **Daily Diaries List Window**, click **Review** on the **Window Toolbar**, and then click **Print** on the **Window Toolbar**.

Click **Close** on the **Application Toolbar** to close the **Daily Diaries List Window** and return to the **Contracts List Window**.

7.7 Adding attachments to a Daily Diary or IDR

Daily Diaries and IDR's can now have attachments. It's recommended that pictures and other files first be inserted and saved into a word document and then attach the word document to FieldManager. Since the attachment won't be visible while viewing the Diary or IDR. The attachment(s) should be opened, printed and saved as a PDF concurrently with the Diary or IDR. The following steps are required to attach a file to a Diary;

- Select the Diary Icon
- Select the ADD icon
- Select the Attachments tab located at the top of the window
- Select the ADD tab on the bottom of the window
- Select the create from file tab (middle tab)
- From with the insert dialog box, select the browse option
- From within the file window, locate the file you would like to insert and select the file by

double clicking on the name of the file.

- Now you're back to the insert dialog box, select ok
- Name the attachment and select add.

To view the attachment, double click on the name of the attachment and another window will appear to view the contents of the attachments.

8. Working with Stockpiles

Stockpile processing was invented to allow payment to a contractor for contract item materials that are purchased and stockpiled for later use. When contractors apply for a stockpile payment, it must be accompanied by a copy of the receipted bill. Once a stockpile payment has been made to the contractor, it must be recovered as the stockpile is incorporated into the work item. FieldManager software will automatically recover the stockpile when an estimate that contains items assigned to that stockpile is created.

To work with stockpiles, use the **Stockpile Wizard**, which guides you through the step-by-step process of **Adding A Stockpile**. A wizard displays detailed instructions while you actually use the software to do work.

8.1 Adding Stockpiles

To Add a Stockpile, select the appropriate contract in the Contracts List Window, and click the Stockpiles icon to display the Stockpiles List Window. Click the Add button on the Window Toolbar to open FieldManager software's Add Stockpile Wizard. The Introduction will automatically display (see Figure 8-1).

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Figure 8-1

Once you have read the instructions in the **Introduction**, click the **Next** button at the bottom of the **Wizard** to move on to Step 1 of 4 of the **Add Stockpile Wizard**. **Step 1 of 4**

Step 1 of 4 asks you to describe the stockpile (see Figure 8-2).

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Figure 8-2

Complete the following fields in Step 1 of 4.

Stockpile Description

Click on the down arrow next to this field to select a stockpile description from the list of description types designated by your agency. (Required) Only one stockpile record can be created for each description type, so the maximum number of stockpiles allowed per contract is limited to the number of description types. If you have questions about the description types listed, contact your System Manager.

Stockpile Add any comments about the stockpile in this field. The information **Comments** entered here will display in inquiries pertaining to the stockpile.

Click the Next button at the bottom of the Wizard to move on to Step 2 of 4 of the Add Stockpile Wizard.

Step 2 of 4

Step 2 of 4 asks you to describe the transaction (see Figure 8-3).

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		Step 2 of	4 Cancel < Prev Next > Finish

Figure 8-3

Complete the following fields in Step 2 of 4.

Transaction Date The date of the transaction, which is typically today's date.

Transaction Dollar The dollar amount of the stockpile transaction. (Required) Amount

Transaction Any comments about the transaction. (Required) Comments

Click the Next button at the bottom of the Wizard to move on to Step 3 of 4 of the Add Stockpile Wizard.

Step 3 of 4

Step 3 of 4 asks you to assign items to the stockpile, and dollar amounts to each item (see Figure 8-4).

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Figure 8-4

Click the **Add Item** button near the bottom of the **Wizard**. The **Items List Window** will display (see Figure 8-5).

Find Item Description:		Fil <u>t</u> er:]		
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Backfill, Swamp	m3	2050001	0025	0.000	
Bit Mixture No. 1100L, 20AA	t	5020115	0040	0.000	
Bit Mixture No. 1100T, 20A	t	5020111	0035	0.000	
Bit Mixture No. 1100T, 20AA	t	5020116	0045	0.000	
Clearing	m2	2010001	0005	1,335.000	1,33
Conc Pavt, Misc, Reinf, 320 mm	m2	6020163	0050	0.000	
Culv, Cl 6, 2100 mm	m	4010163	0055	443.000	
Culv, Rem	ea	2030004	0015	0.000	
Culv,Reinf Conc Ellip,CI HE 3,1920X1220	m	4010668	0060	1,000.000	30
Divider, Reinf Conc, Type 1	m2	8020060	0065	0.000	
Embankment, CIP	m3	2050010	0030	0.000	
Fence, Rem	m	2040009	0020	0.000	
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Figure 8-5

Choose one or more items to associate with the new stockpile, and click the **Select** button (see Figure 8-6), or click **Cancel** to cancel associating items with the stockpile.

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Figure 8-6

If an item selected is in more than one category, FieldManager software displays a **Multiple Categories** window (see Figure 8-7). In that case, choose the appropriate category(ies) for the item, and click either the **Select** or **Select All** button at the bottom of the window.

Multiple Categories (Item: Item: 5020115, Bit Mixture No							>		
Prop. Ln: 0040 Unit: t Type: Orginal Item		Auth. Qty: 3,4 Unit Price: \$22 ding Chgs: 0.0	.000	Qty	Auth. Amt: \$75,900.00 Qty. Placed: 0.000 Qty. Paid: 0.000				
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Figure 8-7

After associating the items with the stockpile, you will need to assign dollar amounts for each of those items. Selecting one item at a time, complete the following field for each item.

Assigned Dollar The dollar amount to assign to the item. (Required) The sum of all the **Amount** amounts entered in this field for the various items must equal the **Transaction Dollar Amount**.

Be careful to distribute the dollar amount that was entered in the **Transaction Dollar Amount** field in Step 2 of 4 among all the items before moving to Step 4 of 4. As shown in Figure 8-8, the following fields are automatically filled in by FieldManager software, and are there to help with this procedure.

Transaction Dollar The total dollar amount of the transaction. Amount

Dollar Amount Left The dollar amount in the transaction that has not yet been distributed to **Distribute** among the items.

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20	Category: 0001, FED 80%/STATE 159		%						
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	Item Description	Unit	Code	Line	Project	Catg.	Amount	Changes	Quantity
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Figure 8-8

You cannot assign a dollar amount to an item that is more than its authorized dollar amount minus what has already been paid on the item. This will ensure that once the item is complete, the stockpile amount will be depleted for the item. This value can be found using the Catg. Auth. Amt., Catg. Qty. Paid, and Unit Price fields near the top of the Wizard (Catg. Auth. Amt. - (Catg. Qty. Paid x Unit Price)).

This also means that items which have not yet been approved, and items with a negative authorized quantity, cannot be assigned to a stockpile. If you have included either of these types of items, select the item to remove from the stockpile, and click the **Delete Item** button.

Click the **Next** button at the bottom of the Wizard to move on to Step 4 of 4 of the **Add Stockpile Wizard**.

Step 4 of 4

Step 4 of 4 asks you to indicate the recovery factor or recovery quantity for each item assigned to the stockpile (see Figure 8-9).

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Figure 8-9

Selecting one item at a time, fill in one of the following two fields for each item.

- **Recovery Factor** The dollar amount that the stockpile payment will be recovered per unit of item paid. This factor may be left blank and will be filled in automatically if a value is put for the recovery quantity.
- **Recovery Quantity** The number of units of the item that you want to use to recover the stockpile payment. If you specify a value for the Recovery Quantity, the Recovery Factor will be filled in automatically when you tab out of the field.

Click the Finish button at the bottom of the Wizard to save the stockpile and close the Add Stockpile Wizard. FieldManager software displays the Stockpiles List Window with the new stockpile selected.

8.2 Changing Stockpiles

The Change Stockpile Wizard guides you through the process of making changes to stockpiles. Click the Stockpile icon and then double click the Stockpiled Items you would like to revise and change. A change stockpile dialog box will appear (see figure 8-10), select the add a new transaction and the stockpile wizard will appear with all the stockpile information associated with the item that was selected and any revisions can be made such as; stockpile description, stockpile comments, transaction amount, recovery factor and recovery quantity.

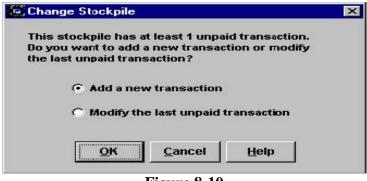


Figure 8-10

This screen offers general information about changing the stockpile via the **Stockpile Wizard**. Simply follow the instructions on the screen, and read the explanations for each step to change a stockpile.

8.3 Adding a Stockpile to Several Different PINs

A single transaction amount may be spread to several different pins. Start by clicking on the **Stockpile** icon, and then click on the **Add** button. After the describing the stockpile and transaction windows have been completed, the following window will require that an item number be selected. Click the **Add Item Number** button, and then confirm that "all" projects is selected. Next, double click the item that is going too associated with the stockpile and a window will appear with all the PINs that have this item, then click on select all button (or highlight the desired PINs) and proceed through the next menus as described previously.

8.4 Viewing the Stockpile Summary

The stockpile summary shows how a stockpile payment has been recovered as work on the contract progresses. To view the stockpile summary, select the **Stockpiles** button on the **Application Toolbar** to display the **Stockpiles List Window**. Select the stockpile to view, and right button and move the cursor to highlight the inquiries, and then click on the stockpile summary sheet (see figure 8-11).

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Figure 8-11. Stockpile Summary Sheet

Click the CLOSE button on the Window Toolbar to close the Stockpile Summary by Stockpile inquiry window.

8.5 Deleting Stockpiles

Stockpiles may be deleted as long as no stockpile payments have been made on the stockpile to the contractor. To delete a stockpile, select a contract from the **Contracts List Window**, and click on the **Stockpiles** button on the **Application Toolbar** to display the **Stockpiles List Window**. Select a stockpile, and click on the **Delete** button on the **Window Toolbar**. As shown in Figure 8-12, FieldManager software displays a **Delete Warning** window that asks to confirm the deletion.



Figure 8-12. Delete Warning

Click **Yes** to delete the stockpile or **Cancel** to cancel the deletion. If you selected more than one stockpile to delete, you can click NO to cancel the deletion of the stockpile listed in the **Delete Warning** window and move on to the next selected stockpile.

Click the **Close** button on the **Application Toolbar** to close the **Stockpiles List Window** and return to the **Contracts List Window**.

9. Producing Estimates

9.1 Understanding How FieldManager Creates Estimate/Voucher Information

FieldManager[®] software goes through a series of steps each time an estimate is created.

First, FieldManager software makes sure the Notice To Proceed Date for the contract has been filled in. If it has not, a Contract Data Warning window will appear stating that this date needs to be filled in. To proceed with creating the estimate, click YES; otherwise, click NO.

If YES is chosen, FieldManager software then calculates item usage by reviewing all item postings that have not been paid but are generated. FieldManager software includes in its calculations information from IDRs that were generated on or before the current estimate date, but which have not yet been included on a prior estimate., FieldManager software calculates the maximum allowable amount that can be paid for each item. The sum of these amounts for each item is displayed in the Item Dollar Amt. field shown in the Add Estimate tab window on the GENERAL tab.

Next, FieldManager software calculates the stockpile allowances for items on the estimate and adds any new stockpiles to the estimate. The Item Dollar Amt. plus the sum of these stockpile calculations is the Total Dollar Amt. field shown in the Add Estimate tab window on the GENERAL tab.

9.2 Creating a Final Estimate

Note: At this time only Semi-Monthly Estimates are to be created in FieldManager. Retent Adjustment, Final Quantity Estimates and Final Estimates are to be done in Augusta through the Contracts Section.

If you are producing a type of final estimate during the closeout process with the Contracts section, it is important to complete several checks before proceeding with the estimate creation process. Otherwise, it is possible that you will encounter multiple warning messages along the way. The following conditions must be met before producing a final estimate:

All IDRs for the estimate must be generated.

All Daily Diaries for the estimate must be generated.

All items for the contract must be marked as completed.

There can be no unapproved contract modifications (excluding those with a status of **deleted**).

If the contract involves material usage, there can be no insufficient materials.

Depending on your agency's settings, the Quantity Placed must equal the Authorized Quantity.

All stockpile balances for the contract must be at zero.

Regarding the stockpile balances being at zero, while it is a good idea to check the Stockpile Summary By Stockpile Inquiry before and after producing any estimates for contracts with stockpiles, it is particularly important for final estimates because any stockpile balances must be zeroed out. You can accomplish this by entering negative actions against any remaining stockpile balances, but an easier way is to use FieldManager software's Balance Stockpiles option while creating the estimate.

The other checks that you will need to make when creating a final estimate type— reviewing item usage, vouchers, the estimate itself, and so forth—are described in the remainder of this chapter. After creating a final estimate, FieldManager software will mark the contract as closed and you will not be able to make any changes to the contract without manually re-opening the contract.

9.3 Adding Estimates

To add an estimate, select the appropriate contract from the Contracts list window, and click ESTIMATES on the Application Toolbar to display the Estimates list window. Click ADD on the Window Toolbar. A Select Estimate Date and Type window will display (see Figure 9-1).

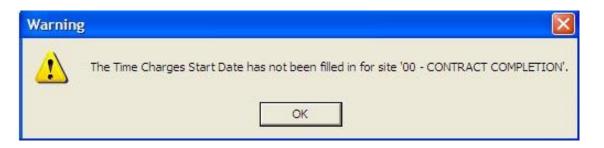
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Estimate Date:	: 03/09/2010
Estimate Type:	SEMI-MONTHLY
OK	Cancel Help

Figure 9-1 Estimate Date & Type

Use the Calendar icon to select the estimate date or type it in directly. The Estimate Date field will default to the current date. When producing the first estimate for a contract, you can enter any date that falls on or prior to the current date. When producing subsequent estimates, however, not only are you limited by the current date, you also cannot enter a date that falls before the last estimate produced. If you enter an invalid date, a window will display specifying the reason the date is not valid. Click OK to exit the window, and then enter a date that meets the estimate date criteria.

Next select Estimate Type – **Semi-Monthly** from the dropdown unless otherwise directed by the Contracts section. This list is populated by options your agency has selected in the Agency Configuration Program. This is a required field. Once both fields have been entered click OK to continue or click CANCEL to cancel the Estimates process.

If you click OK, FieldManager software runs a series of checks and calculations and then should display the following warning.



Click OK on this message – MDOT does not use the time charge feature within this program. If this warning does not appear then a date has been entered in the Site Times tab of the Contract Documentation and needs to be deleted so that liquidated damages are not automatically assed to the contractor. After OK has been selected on the warning message the Add Estimate tab window will open with the GENERAL tab displayed (see Figure 9-2). **Please Do not add Estimate Comments**

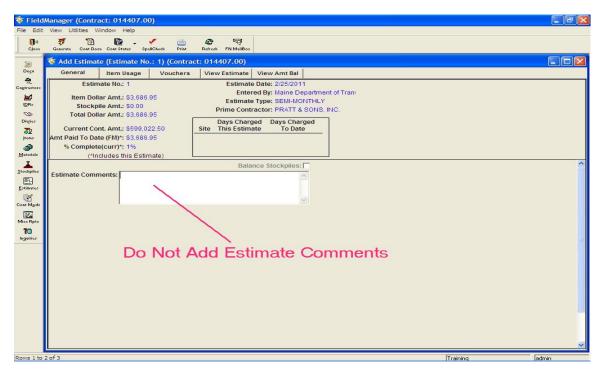


Figure 9-2. Estimate General Tab

. Note: Once this window is open, no one else can modify the contract until the estimate is generated or the window is closed.

The next step is to complete the tabs in the Add Estimate tab window. Each time you add an estimate, FieldManager software numbers it in sequence. The Title Bar of the window displays the estimate's sequence number, called the Estimate No.

Warning: You cannot save an estimate and generate it later. When adding an estimate, enter the necessary information on all the tabs in the Add Estimate window, and then generate the estimate. If for any reason you start adding an estimate and need to close the Add Estimate window, all the information added will be lost, and you will need to start from the beginning to create the estimate.

9.4 Adding General Information

No information needs to be or should be added in this section of the estimate – Do **NOT** make an entry within the **Estimate Comments** block. This block is used for code from another program within the DOT payment system. Information place here needs to be deleted prior to the estimate being processed and will cause a system freeze/crash if not caught in time.

9.5 Reviewing Item Usage

The next step in adding an estimate is to verify that the contractor receives the appropriate payment for all item usage recorded. In some cases, item payment quantities may need to be adjusted or payment may need to be withheld for insufficient materials.

To review item usage, click the ITEM USAGE tab to see a list of items eligible for payment (see Figure 9-3).

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Figure 9-3. Estimate Item Usage Tab

The items listed contain the following information.

Item Description	Description of the item with progress.
Item Code	Item code of the item with progress.
Prop. Line	The proposal line number.
Insuff. Matl.	This field is for agencies using the Materials functionality in FieldManager software. If checked, this indicates that the item had insufficient materials. This means that the item has material usage recorded that puts it over its approved material amount.
Overrun Flag	This field will be checked if the quantity placed is greater than the authorized quantity.
Atten.	This field will be checked if the item has been marked in the DOCUMENTATION tab of the Item tab window as needing attention from the engineer or supervisor.
Qty. this Estimate	Quantity calculated by FieldManager software which is eligible for payment.
Dollar Amount	Dollar amount calculated by FieldManager software which is eligible this Estimate for payment for the item. This is the Qty. this Estimate times the Unit Price for the item.
Allowable Qty.	Maximum allowable quantity calculated by FieldManager software to be paid for the item on this estimate.
Allowable Dollar	Maximum allowable dollar amount calculated by FieldManager Amount software to be paid for the item on this estimate. This is the Allowable Qty. times the Unit Price for the item.

9.6 Viewing Vouchers

Estimates generated by FieldManager software will in turn generate vouchers in your agency's central office contract administration system.

To view a voucher, click the VOUCHERS tab. A list of the projects in the contract and the estimated payment for each project will be displayed (see Figure 9-4).

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Figure 9-4. Estimate Vouchers Tab

Be sure to carefully check the balances for all the listed projects, noting that each project in the contract is listed separately. If the Create Voucher check box is selected, a voucher will be created for the associated project. If the Create Voucher check box is deselected, a voucher will not be created for the associated project. Table 9-1 describes the acceptable settings for the Create Voucher check box for all contract types.

Voucher Amount	Default Setting	Modifiable
Greater than \$0.00	Checked	No
Equal to \$0.00	Not checked	Yes
Less than \$0.00 (negative)	Checked	Yes

Table 9-1. Create Voucher Check Box Settings

As noted in Table 9-1, if the estimated payment amount for a voucher is greater than \$0.00, a voucher will automatically be created and you will not be able to deselect the Create Voucher check box. If a project has no progress, or, in other words, the amount for the voucher is equal to \$0.00, the Create Voucher check box is automatically deselected.

In this case, however, you have the option of changing the setting of the Create Voucher check box. If desired, you can select the Create Voucher check box and a \$0.00 voucher will be created for the project. If a project has a negative voucher amount, the Create Voucher check box will automatically be selected, but if desired, you can deselect the check box so a voucher will not be created for the project.

9.7 Viewing the Construction Pay Estimate Report

Before generating the estimate, always check your work. Click the VIEW ESTIMATE tab of the Add Estimate tab window to view an electronic copy of the Construction Pay Estimate Report that will print out when the estimate is generated (see Figure 9-5).

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Figure 9-5. View Estimate Tab

The Construction Pay Estimate Report lists general contract information, the items for which the contractor will receive payment, any stockpile payment, time charges, and subcontractors associated with items receiving payment.

The following sections are on the report to verify information found there.

Item Usage Summary	Lists each item with usage by project and then by category, the quantity of the item to be paid, and the estimated payment to the contractor. Subtotals are included by category and project, as well as the total estimated payment for all items with usage.
Stockpile Summary	Lists stockpiles by project and then by category, the quantity of payment being made for the stockpile, and the cumulative quantity paid on the stockpile. Subtotals are included by category and project, as well as the total estimate payment for all stockpiles.
Pre-Voucher Summary	Lists for each project the voucher number, the estimated item payment, the estimated material allowance amount, and the total estimated payment that does not include retainage and central office autopay items.
Current Time	Lists the days charged to each site in the contract. Only available day Charges sites will show a value; all other sites will show N/A .

9.8 Generating the Estimate

Once you have checked all the information and are sure the estimate is correct, click GENERATE while still in the Add Estimate tab window.

To generate the estimate, click GENERATE. As shown in Figure 9-6, FieldManager software displays a Generate window to confirm the generation of the estimate.

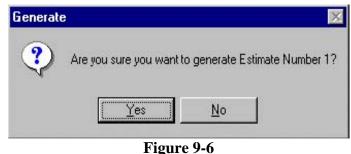


Figure 7-0

Click YES to generate the estimate or NO to cancel the generation and return to the Add Estimate tab window.

FieldManager software takes a moment to display the Print dialog boxes for each of the reports. Adjust the printer settings just as if you were printing a document from a word processing or spreadsheet program, and click OK.

Note: If you do not want to print these reports, click CANCEL in the Print dialog boxes. Doing so will not cancel the generation, it will only cancel the printout of the reports. To print any of these reports later, select the estimate from the Estimates list window, click REVIEW on the Window Toolbar, and then click PRINT on the Window Toolbar.

If you choose OK, FieldManager software will print the Construction Pay Estimate Report, the Construction Pay Estimate Amount Balance Report, and the Insufficient Materials Report. Then it will close the Add Estimate tab window and display the Estimates list window with the new estimate selected.

9.9 Transfer Estimate from your FieldManager to Augusta.

When an estimate is generating the outgoing file is placed in your FieldNet Mailbox with a status of "Not Sent". Before you can send or receive messages through the FieldNet system will first need to be connected to the state intranet (you do not have to be connected to create and generate an estimate). You will then need to click the FN Mailbox button on the top menu of your screen and then click Send Outbox located again on the top menu. After the estimate has been received, approved and processed within the FieldNet system and sent to the CAS system 3 messages will be sent to your FieldNet account. The first message will be a text file telling you that the estimate has been approved. The second message will also be a text copy of the estimate sent in and the third message will be your contract refresh that will update your system and change the status of your estimate from exported to refreshed so that your next estimate can be created.

9.10 Reviewing an Estimate

To review an estimate, select a contract in the Contracts list window and click ESTIMATES on the Application Toolbar to display the Estimates list window. Select an estimate, and click REVIEW on the Window Toolbar.

FieldManager software displays the Review Estimate tab window in a mode in which you can view, but not change, data (see Figure 9-7).

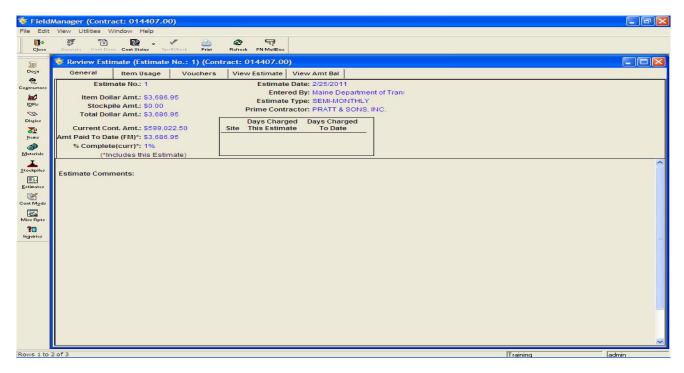


Figure 9-7

Click any of the tabs to review the information for the estimate. To reprint the Construction Pay Estimate Report, click the VIEW ESTIMATE tab, then click PRINT on the Window Toolbar. To reprint the Construction Pay Estimate Amount Balance Report, click the VIEW AMT BAL tab, and then click PRINT on the Window Toolbar. To reprint the Insufficient Materials Report, click the VIEW INSUFF MTL tab, and then click PRINT on the Window Toolbar.

To close the Review Estimate tab window, click CLOSE on the Application Toolbar.

10. Working with Contract Modifications

A contract modification modifies the terms of the original contract. A contract may be modified for a number of reasons: items may need to be added to the contract, item quantities of existing contract items may need to be increased or decreased, or a time extension or change in the wording of the contract may be required.

When a contract modification is created, FieldManager[®] software automatically assigns a contract modification number to it. This identification number is used to track the contract modification, and it may not be altered by the user.

The Contract Modifications list window displays the modifications previously made on a contract. To display the Contract Modifications list window, select a contract in the Contracts list window, and click CONT MODS on the Application Toolbar (see Figure 10-1).

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Figure 10-1. Contract Modification List Window

10.1 Adding New Contract Modifications

A new contract modification may be created via the Contract Modifications list window by clicking the Add button at the top of the page and then completing the appropriate tabs in the Add Contract Modification tab window.

10.2 Adding General Information for a New Contract Modification

The GENERAL tab of the Add Contract Modification tab window contains the following two fields – Short Description and Description of Changes (see Figure 10-2).

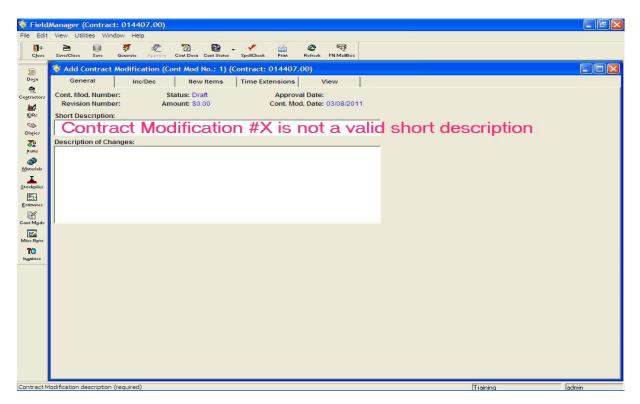


Figure 10-2. Add Contract Modification Window

To create a complete record, enter information in the following fields.

The **Short Description** of the contract modification which will display in the Contract Modifications list window. This description should be a brief description that will identify the contract modification but it should be no longer than 55 characters – the FieldManager software allows more than this but CAS system within Augusta that the information is passed through does not. **"Contract Modification X" is not a valid short description.**

Description of Changes is a longer, more detailed description of the contract modification. This area is used to describe the changes being made, the reason for the changes, the costs associated with the changes and the justification of the cost. Up to 32,000 characters may be entered.

Click SAVE on the Window Toolbar and move to the next appropriate tab if there is going to be changes in existing items (Inc/Dec), addition of items (New Items) or time added (Time Extensions) associated with this contract modification.

Click SAVE/CLOSE on the Window Toolbar to save your work and close the Add Contract Modification tab window if no other changes to the contract will be associated with this contract modifiation. FieldManager software will save the information and then revert to the Contract Modifications list window.

10.3 Increasing or Decreasing Item Quantities through a New Contract Modification

Sometimes it is necessary to make a new contract modification to increase or decrease the quantity of an item in the contract. To increase or decrease quantities click the INC/DEC tab (see Figure 10-3).

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Figure 10-3. Contract Mod Inc/Dec Tab

Click ADD ITEM at the bottom of the window. FieldManager software displays the contract Items list from which the item(s) can be selected. Choose one or more items, and click SELECT at the bottom of the window (see Figure 10-4).

Project: <all></all>	tract: 014407.00)	> 👻				
Contractor: A	>				-	
ind Item Code:			Fil <u>t</u>	er: <show< th=""><th>All></th><th>-</th></show<>	All>	-
Ite	m Description	Units	Item Code 201.11	Prop. Line 0010	Quantity Placed 0.000	Quantity A Paid
	GLE TREE TOP ONLY	EA	201.23	0020	4.000	10.0
REMOVING STU		EA	201.24	0030	0.000	2.0
OMMON EXCA		CY	203.20	0040	0.000	4,532.0
OCK EXCAVAT		CY	203.21	0050	0.000	2,172.0
GGR SUBB CC	OURSE - GRAVEL	CY	304.10	0060	0.000	2,212.0
OT MIX ASPHA	ALT 19.0 MM HMA	т	403.207	0070	0.000	0.0
OT MIX ASPHA	ALT 9.5 MM (INCIDENTALS)	Т	403.209	0080	0.000	0.0
OT MIX ASPHA	ALT 9.5 MM	Т	403.210	0090	0.000	0.0
OT MIX ASPHA	ALT 12.5 MM BASE	т	403.213	0100	0.000	0.0
-	Select Filter	So	rt Can	Cel H	elp	
55 5 5	Select Filler		rt Can	Cel	elp	

Figure 10-4. Contract Mod Inc/Dec Tab

When an item has been selected the following quantity change window will be displayed (see Figure 10-5).

뜧 Field/	Manager (Contr	act: 0144(07.00)											- 6 🛛
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ي Co <u>n</u> tractors	General Item: 403.2 Prop. Ln: 0070	Inc 7, HOT MIX A Unit: T		9.0 MM HM	Items IA uth. Qty: 95	Time Exte		1	/iew Amt: \$79.0	1				
DR:	Type: ORIGI Project: 01440 Category: 0001,	VAL ITEM 7.00, RUMFO	RD, TURN	Un g. Pendin	it Price: \$8 g Chgs: 0.0	3.260 000	Catg.	. Qty. Plac	ced: 0.000 Paid: 0.000	57.00				
Diagies	De	scription		ltem Code		Project		Quar Chang	e (+/-)	Dollar Value	Catg. Auth. Qty.	Changes	Catg. Auth. + Penc Quantity	Atten.
Materials	HOT MIX ASPH/	ALT 19.0 MM	IHMA	403.207	0070	014407.0	0 0001		0.000	\$0.00	950.000	0.000	950.00	0
Estimates														
Cont Mods														
Misc Rpts														
?O Inguiries														
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	Reaso	1:												
							A	dd Item	Dele	te Item				
Amount to	increase or decreas	e the item au	antity by (required)								Training		admin

Figure 10-5. Contract Mod Inc/Dec Tab

If an item selected is in more than one category and or project, FieldManager software displays a Multiple Categories window (see Figure 10-6). In that case, choose the category(ies) or projects for which to increase or decrease the item quantity, and click either SELECT or SELECT ALL at the bottom of the window.

🌾 P	ieldManager (Contract: 0	14407.00)					_ - - ×
File	🌾 Multiple Categories (It	em: 201.11) (Contract: 014	1407.00)		1		
Do	Item: 201.11, CLEARING Prop. Ln: 0010 Unit: AC Type: ORIGINAL ITEM	Auth. Qty: 1.400 Unit Price: \$5,000.000 Pending Chgs: 0.000	Auth. Amt: Qty. Placed: Qty. Paid:	\$7,000.00 0.000			_ 🗆 🗙
Contra	The fo	llowing Item is in more than or Select the Category(s) you					
2	Find Project:	-	Fil <u>t</u> er: Show All>	•			
- O Dis	Category Description PROJECT ITEMS			Quantity Quar Placed Pa 0.000			
Jte	PROJECT ITEMS		ORD, SLOPE RECONST	0.000			
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Estin	<	illi		>			
Cont I	Select Se	lect All Filter Sort	Cancel Help				
Mise I	Rpts						
? C Ingui							
			Add Ite	m Delete Iter	m		
Rows	1 to 2 of 2					Training	admin

Figure 10-6. Multiple Catagories

To increase the item quantity, enter a positive number in the Qty Change (+/-) field. To decrease the item quantity, enter a negative number in the Qty Change (+/-) field. Document the reason for the change in the Reason field – this can be a reference to the "Description of Changes this modification" if the reason has already sufficiently been stated there.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

10.4 Adding New Items to a Contract via a New Contract Modification

Although new items can be tracked in FieldManager software, they must be approved through the Contract Modification process before being eligible for payment.

There are two ways to add new items to a contract in FieldManager software, and in both cases, a new contract modification must be created. The first way to add a new item is to "start from scratch" and add all the item information through the Contract Modification process – **This is the way that Maine DOT requires**. The second method – **Not used by Maine DOT-** is to establish an unattached item through FieldManager software's Item functionality, and then add it to a contract through the Contract Modification process.

To add an item through a new contract modification, select the appropriate contract in the Contracts list window, and click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Click ADD on the Window Toolbar to open the Add Contract Modification tab window, and then click the NEW ITEMS tab (see Figure 10-7).

At Jose Si	🚵 💕		Approve	Item Doc Cont S			e Print	Refrash			
	ter and the second second	N		lod No.: 3) (Co	1	and and and a		(s		-1	_
⊑u 1	General		c/Dec	New Item	s Tir	ne Exten	sions	v	iew		
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Figure 10-7. New Item Tab

Click ADD ITEM at the bottom of the tab to add an item.

As shown in Figure 10-8, FieldManager software displays the Items dialog box.

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)o you wish to: —			
	📀 Add a N	ew Item		
	O Attach a	in Item saved p	reviously	112
1995	<u>0</u> K	<u>C</u> ancel	<u>H</u> elp	



Choose one of the following two methods to add the item(s) through the contract modification.

Adding a New Item

To add a new item, choose the ADD A NEW ITEM option in the Items dialog box (see Figure 10-8)

and click OK to proceed, or click CANCEL to quit.

FieldManager software displays an entry area on the NEW ITEMS tab to add the new item (see Figure 10-9).

뜧 Field	Manager (Cont	ract: 0144	07.00)										
File Edit	View Utilities	Window Hel	p										and the second second second
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Ð	😻 Add Contra	act Modific	ation (Co	nt Mod	No.: 1) (Contract: (014407.	00)					
Dogu	General	Inc	c/Dec	New	Items	Time Exte	ensions	V	iew				
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- DR#	Supplemental Description:							-					
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Diagies	Unit Price:			Unit:									
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Ð													
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Misc Rpts													
Inguiries													
								ок	Canc	el			
Item numb	er of the new item	(required)										Training	admin

Figure 10-9. New Item Information

To create a complete item record, enter information in the following fields.

Item	The item number from your agency's master item list. (Required) If you do not know the correct item number, click the drop-down arrow next to the item number box. This will display your agency's master item list. From there, select the item to add.				
Item Type	A code value representing the kind of item. (Required) Click the dropdown arrow to reveal your agency's defined Item Types (normally Change Order).				
Unit Price	The cost of one unit of the new item selected. (Required) This price cannot be negative.				
Reason	The reason the item needs to be added to the contract. (Required)				
Section	The number assigned to the grouping of proposal work items. (Required)				
Proposed Quantity	The initial quantity to be established for the new item. (Required) Enter a quantity for each category with which to associate the item. The quantity can be either positive or negative.				
Supplemental Description	An area to more fully describe the new item. This is particularly useful when the description of the new item does not precisely match the agency's master items database.				
	This field may be required under certain circumstances, depending on your agency's settings. Enter a description on the first line before entering anything on the second line.				
Note: If th	e category to associate the item with is not available, it must be brough				

Note: If the category to associate the item with is not available, it must be brought into FieldManager software through your agency's central office contract administration.

After entering the information for the item, click OK to add the item to the contract modification, or CANCEL to return to the NEW ITEMS tab without adding the item.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

10.5 Adding Time Extensions via a New Contract Modification

Extensions of time to a contract must be done through the Contract Modification process. To extend time on a contract through a new contract modification, select the appropriate contract in the Contracts list window, and click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Click ADD on the Window Toolbar to open the Add Contract Modification tab window, and then click the TIME EXTENSIONS tab (see Figure 10-10).

뜧 Field/	Manager (Contract: 014407.00)	
File Edit	View Utilities Window Help	
Close	🖹 😝 🌮 😤 📴 - 🖌 🖄 🎝 🖓 Save/Close Save Generate Approve Cont Status SpellCheck Print Refresh FN MullBox	
1	🕏 Add Contract Modification (Cont Mod No.: 1) (Contract: 014407.00)	
Dogu	General Inc/Dec New Items Time Extensions View	
👮 Contractors	Completion Dates: Original: 7/1/2011 Auth: 7/1/2011 Pending:	
	Days Used: 0	
I <u>D</u> Rø	Site Site Description	
0	00 COMPLETION DATE CONTRACT COMPLETION	
Diagies		
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Misc Rpts		
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	New Compl. Date: 00/00/0000	
	Reason:	
The new da	ate for contract completion (optional)	Training admin

Figure 10-10. Time Extension Tab

The TIME EXTENSIONS tab displays all sites for the contract. Each site will be one of three types: available day (working day), calendar day, or completion date (most MDOT contracts will be completion date). For an available day site, simply increase the number of days that are available for work. For a calendar day or completion date site, select a new date on which work must be completed.

10.6 Viewing the New Contract Modification

It is a good idea to check your work before generating the contract modification. To check the record, click the VIEW tab of the Add Contract Modification tab window to view an electronic copy of what will print out when the contract modification is generated (see Figure 10-11).

Save/Close	Save Generate	Approve C	iont Status SpellCheck	Print Refresh FN MailBox			
🍹 Add Co	ontract Modifi	cation (Con	nt Mod No.: 1) (Cor	ntract: 014407.00)			
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	1 10						
	MaineDOT					3/8/2011 1:19 PM	
	Maine Department of T	ransportation				FieldManager 4.7a	
	Contract: 0144	07.00, RUMFC	ORD, HIGHWAY IMPROV	EMENTS			
	Cont. Mod. Number	Revision Number	Cont. Mod. Date	Net Change	Awarded Contra	ct Amount	
	1 Route		3/8/2011	\$3,017.40	\$593,397		
	108						
	Contract Locate		SOMPTE 108				
	Short Descri	ption					
			oving Pavement Surface				
		tem 202.202 F	emoving Pavement Su	face at a unit price of \$3.85 to		ordance with	
				i 03/04/2011 - see attached mi		1950 - 10 - 10 - 1	
				t station 100+22 It eliminated t tract. Pavement will be placed			
	Change the com	pletion date o	f the contract from 7/1/1	1 to 7/30/11			
	Increases / [ecreases					
	10.000		TURNING LANES CONS	TRUCTION			
	Category: 000 Item Descriptio	n	Item Code	Prop.Ln. Item Type Unit	Quantity Chq. Unit Price	e Dollar Value	
	HOT MIX ASPHA	LT 19.0 MM HM	A 403.207	0070 ORIGINAL T	-10.000 83.2600	0 \$-832.00	

Figure 10-11. View Tab

If all the information is correct and you are ready to generate the contract modification, refer to Section 10.9 of this document for further instructions. Otherwise, click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

10.7 Changing Existing Contract Modifications

You may need to change existing contract modifications so they contain accurate information, and so they can receive the proper approval. There are several statuses a contract modification may have:

Draft	The contract modification has been added in FieldManager software but not generated.
Pending Approval	The contract modification has been generated in FieldManager software, but is waiting on approval and signatures.
Deleted	The contract modification has been generated, but then deleted. The status of the contract modification will display as deleted in the Contract Modifications list window, and the contract modification identification number will not be reused by FieldManager software for future contract modifications.

Approved

The contract modification received the necessary review and sign off, and is now included in the legal contract.

A contract modification may only be changed when it is in draft or pending status. If you change a pending contract modification, its status will revert to draft with a revision number, and you will need to generate it again. Once approved, a contract modification cannot be modified or deleted in FieldManager software.

10.8 Viewing the Revised Contract Modification

After changing a contract modification, it is a good idea to check your work before generating the contract modification again. To do this, click the VIEW tab of the Change Contract Modification tab window to view an electronic copy of what will print out when you generate the contract modification (see Figure 10-12).

	Contract: 014								
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Save/Close	Save Generate			Print Refresh FN					
) (Contract: 01440					
Gener	ral lı	nc/Dec	New Items	Time Extensions	View				
2									
Contract Modification									
	MaineDOT 380011124 BM								
NaineBUO Naine Department of Transportation Security 2011 Security									
	Contract: 0144 Cont. Mod.	Revision	Cont. Mod.						
	Number	Number 2	Date 3/8/2011	Net Change \$3.017.40	Aw	arded Contract Amount \$593,397,50			
	Route						-		
8	Contract Locati	on					_		
ds	THREE PROJE	CT LOCATION	S ON RTE. 108.						
	Short Descri	intion					-		
	Addition of item	202.202 Rem	oving Pavement Surf	a ce					
		item 202.202 F	Removing Pavement	Surface at a unit price of eld 03/04/2011 - see atts		407.00 in accordance with es.			
	Decrease item 4	03.213 HMA 1	9mm by 10 ton - area	at station 100+22 It elin	ninated from contract	because town utility work wil under the utility contract.	10		
	Change the con	pletion date o	of the contract from 7/	1/11 to 7/30/11					
	Increases / Decreases Project: 014407.00, RUMFORD, TURNING LANES CONSTRUCTION Category: 0001, PROJECT ITEMS								
	Item Descriptio HOT MIX ASPHA		Item Co A 403.207	de Prop.Ln. Item Type 0070 ORIGINA	e Unit QuantityChop LT -10.00				
Page 1 of	2 Previ	ous Page	Next Page	Zoom In	Zoom Out	Sort Order			
							Training	ladmin	

Figure 10-12

Review the changed contract modification for correctness and completeness. If there are any mistakes, click the appropriate tab and correct the information.

Click either SAVE or SAVE/CLOSE on the Window Toolbar depending on how you would like to proceed.

10.9 Generating a Contract Modification

Once a contract modification is correct and complete, generate it so that it can receive a pending status and be sent off for the necessary approvals and signatures. This also applies to revised contract modifications.

To generate a contract modification, select the appropriate contract from the Contracts list window, and click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Select the contract modification to generate, and click GENERATE on the Window Toolbar.

. Note: You can generate a contract modification from the Contract Modifications list window or from any of the Contract Modification tab windows after working in them.

As shown in Figure 10-13, FieldManager displays a Generate window that identifies the contract modification to generate.



Figure 10-13

Click YES to confirm the generation, or NO to cancel the generation.

If the response is YES, FieldManager will then display a second Generate window (see figure 10-13a) that will ask you if the contract modification being generated requires a supervisor's approval. Clicking NO on this box is the normal practice by Maine DOT. Clicking YES on this box does not take the place of the hand written signatures required for contract modification approval. It will however lock the status of the contract modification while it is routed through the FieldNet system until a return file has been received by the FieldManager user. This process requires that the FieldNet administrator (Guy Berthiaume at this time) review the modification and mark it as FieldNet approved so that the return file can be sent to the user. The review in FieldNet is a very basic nature unless a request is made either by email or phone prior sending it through the FieldNet system.



Figure 10-13a

FieldManager software takes a moment to generate the contract modification and then displays the Print dialog box. Adjust the printer settings just as if you were printing a document from a word processing or spreadsheet program, and click OK.

. Note: If you do not want to print the paper report, click CANCEL in the Print dialog box. Doing so will not cancel the generation, it will only cancel the printout of the report.

FieldManager software prints the contract modification report and changes the status of the contract modification to pending approval in the Contract Modifications list window.

Click CLOSE on the Application Toolbar to close the Contract Modifications list window and return to the Contracts list window.

10.10 Approving a Contract Modification

Once the proper parties have signed a contract modification, you need to approve the modification in FieldManager software. Keep in mind, however, that a contract modification may only be approved if it is in pending approval status. Also, be aware that once it is approved, a contract modification cannot be modified or deleted in FieldManager software.

To approve a contract modification, select the appropriate contract from the Contracts list window, and click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Select the contract modification to approve, and click APPROVAL on the Window Toolbar. As shown in Figure 10-14, FieldManager software displays the Contract Modification Approval window.

proval		×
Status: Pending Approval Amount: \$3,017.40	Approval Date: Cont. Mod. Date: 3/8/2011	
wing Povement Surface		
ung Pavement Sunace		
Approval Date: 03/08/2011	1	
OK Cancel He	alp	
	Status: Pending Approval Amount: \$3,017.40 oving Pavement Surface Approval Date: 03/08/2011	Status: Pending Approval Amount: \$3,017.40 Approval Date: Cont. Mod. Date: 3/8/2011 oving Pavement Surface Approval Date: 03/08/2011

Figure 10-14

Enter the date the modification was approved in the Approval Date field, and click OK to continue, or click CANCEL to cancel.

FieldManager software displays a dialog box that asks whether the contract modification has received all the necessary approvals. Click YES to confirm, or NO to cancel the approval and return to the Contract Modifications list window.

As a safety measure, if you click YES, FieldManager software displays a second dialog box, this time reminding you that once a contract has been approved, it cannot be changed or deleted. Click YES to approve the modification, or NO to cancel the approval and return to the Contract Modifications list window.

If you click YES, FieldManager software changes the status of the contract modification to approved. When a Contract Modification is generating or approved the outgoing file is placed in your FieldNet Mailbox with a status of "Not Sent". Before you can send or receive messages through the FieldNet system will first need to be connected to the state intranet (you do not have to be connected to create, generate or approve a contract modification). You will then need to click the FN Mailbox button on the top menu of your screen and then click Send Outbox located again on the top menu.

Click CLOSE on the Application Toolbar to close the Contract Modifications list window and return to the Contracts list window.

10.11 Reviewing a Contract Modification

To review a contract modification, select the appropriate contract in the Contracts list window, and click CONT MODS on the Application Toolbar to display the Contract Modifications list window. Select a contract modification, and click REVIEW on the Window Toolbar. FieldManager software displays the Review Contract Modification tab window in a mode in which you can view but not change information.

Click any of the tabs to review the information for the contract modification.

Click CLOSE on the Application Toolbar to close the Review Contract Modification tab window and return to the Contract Modifications list window.

11. Working with Inquiries and Reports

While managing a contract on a computer is much less cumbersome than pen and paper methods, there is still a need for some paper reporting and tracking of construction contracts. FieldManager[®] software includes inquiry and report functions that help keep track of, and report on, contract progress.

11.1 Viewing and Printing Inquiries

Inquiries are brief views of contract information you can print or view on screen to review contract activity. Inquiries are informal views of information grouped in several different and useful formats. You can access inquiries from list and tab windows, or select inquiries from a list of all the FieldManager software inquiries.

11.1.2 Viewing and Printing Inquiries from the Inquiries List

If a window associated with a contract is open, the Application Toolbar always displays an INQUIRIES button. Click INQUIRIES to display a list of inquiries to view and print for the selected contract. FieldManager software displays the Inquiries list window, and lists the contract you are viewing or printing information for in the window.

💗 FieldManager (Contract: 014407.00)	
File Edit View Utilities Window Help	
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Dogu Find Inquiry:	Filter: <show all=""></show>
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IDBa Dieakdowns by kenn	
Category Status	
Contract Modifications Summary	
Contract Progress	
Items Contract Status	
Contractors by Estimate	
Materiale Daily Diary Time Charges by Site	
Estimate Payments by Item	
Stockpiles Estimate Vouchers by Estimate	
Item History to Date	
Estimates Item Increases and Decreases by Item	
Item Increases and Decreases That Are Pending	
Cont Mode Item Postings by Breakdown	
Item Postings by Contractor	
Misc Rpts Item Postings by Entry Date	
10 Item Postings by IDR Date	
Inguiries Item Postings by Inspector	
Item Postings by Item in Breakdown Order	
Item Postings by Item in IDR Order (Does Not Include Material Usage)	
Item Postings by Item in IDR Order (Includes Material Usage)	
Item Postings by Item That Are Marked For Attention	
Item Postings Summary by Item in Breakdown Order	
Item Progress by Item	
Item Status	
Item Type Change Amounts by Contract Modification	
Items by Breakdown	
Items by Contractor	
Items by Material	
Items by Project/Category in Item Order	
Jtems by Project/Category in Project Line Number Order	×
Rows 1 to 30 of 58	

There are nearly 60 inquiries that show detailed information about item postings, items, contract modifications, stockpiles, estimates, and much more. Filter and sort the Inquiries list window just like

any other list window.

Select an inquiry from the Inquiries list window, and click VIEW on the Window Toolbar. If the inquiry requires that a choice be made from a list of available records of data for the inquiry, a selection window will appear. Some of the more popular inquires are: Estimate Payments by Item, Items History to Date, Item Postings by IDR Date, Item Postings by Inspector, Item Status, Project Status and Stockpile Summary by Stockpile.

챻 Select Item History to Date					
Project: <all> Category:</all>	<ali> 👻</ali>				
Contractor: <all></all>	02 00			-	
Find Item Code:		Fil <u>t</u> er	Show All>	· _	
Item Description	Units	ltem Code	Prop. Line	Quantity Placed	Quan A
CLEARING	AC	201.11	0010	0.000	
REMOVING SINGLE TREE TOP ONLY	EA	201.23	0020	4.000	-
REMOVING STUMP	EA	201.24	0030	0.000	
REMOVING PAVEMENT SURFACE	SY	202.202	0400	0.000	
COMMON EXCAVATION	CY	203.20	0040	0.000	4,53
ROCKEXCAVATION	CY	203.21	0050	0.000	2,17
AGGR SUBB COURSE - GRAVEL	CY	30 <mark>4</mark> .10	0060	0.000	2,21
HOT MIX ASPHALT 19.0 MM HMA	Т	403.207	0070	0.000	
HOT MIX ASPHALT 9.5 MM (INCIDENTAL)		403.209	0080	0.000	
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	Item His ENTS Category Category Description CT ITEMS	tory to Date Item Code 201.11 d Quantity Pa 1.340 Orioj Authorized Dito 0.440 Dito 0.560	Prop. Line Unit 0010 AC id Guantity nings Placed 0.000 0.000 0.000 0.000	Secon 14 Pielovange PRIGINAL ITEM 5,000.00000 y Unpaid Item Complete 340 No Quantity Quantity Paid Unpaid 0.393 -0.393	SPM
	Item His ENTS Category Category Description CT ITEMS	tory to Date Item Code 201.11 d Quantity Pa 1.340 Orioj Authorized Dito 0.440 Dito 0.560	Prop. Line Unit 0010 AC id Quantity nges Placed 0.000 0.000	Secon 14 Pielovange PRIGINAL ITEM 5,000.00000 y Unpaid Item Complete 340 No Quantity Quantity Paid Unpaid 0.393 -0.393	SPM
	Item His ENTS Category Category Description CT ITEMS	tory to Date Item Code 201.11 d Quantity Pa 1.340 Orioj Authorized Dito 0.440 Dito 0.560	Prop. Line Unit 0010 AC id Guantity nings Placed 0.000 0.000 0.000 0.000	Secon 14 Pielovange PRIGINAL ITEM 5,000.00000 y Unpaid Item Complete 340 No Quantity Quantity Paid Unpaid 0.393 -0.393	SPM
	Item His ENTS Category Category Description CT ITEMS	tory to Date Item Code 201.11 d Quantity Pa 1.340 Oto 0 0.440 0010 0.440 0010 0.440 Re	Prop. Line Unit 0010 AC id Guantity nings Placed 0.000 0.000 0.000 0.000	Secon 14 Pielovange PRIGINAL ITEM 5,000.00000 y Unpaid Item Complete 340 No Quantity Quantity Paid Unpaid 0.393 -0.393	SPM

Buttons in the window and the vertical scroll bar allow for movement between pages. The Status Bar shows the current page number and the total number of pages for the inquiry.

ZOOM IN and ZOOM OUT buttons allow you to view certain data more closely or all the data on a page at once.

The inquiries requiring that a choice be made from a list of available records of data have a CHANGE SELECT button which allows you to change the records of data to be displayed in the inquiry.

To close the View Inquiry window or the Inquiries list window, click CLOSE on the Window Toolbar.

11.2 Viewing and Printing Reports

Reports contain significantly more detail than inquiries, and they list specific contract information that can be passed along for review and approval, or filed to keep a paper record of contract activity on hand. Reports are formal documents used to maintain a paper trail of contract activity. Reports often print when finishing a major FieldManager task, such as generation of an estimate or a contract modification.

11.2.1 Viewing and Printing Contract Reports

When an IDR, contract modification, Daily Diary, or estimate is generated, one or more corresponding reports are automatically generated and may be printed as indicated in Table 12-1.

Generation	Automatic Report
IDR	Inspector's Daily Report FieldBook Import Report (not printed, this report is only created in response to importing one or more IDRs from FieldBook)
Contract Modification	Contract Modification
Daily Diary	Daily Diary Report
Estimate	Construction Pay Estimate Report Construction Pay Estimate Amount Balance Report
	Insufficient Materials Report (only available if an agency has selected it as an option)

Table 12-1. Contract Report Generation

To view and/or print these reports at other times, simply click the VIEW tab of any of the IDR, Contract Modification, Daily Diary, or Estimate tab windows for the selected contract. Use the PREVIOUS PAGE, NEXT PAGE, ZOOM IN, and ZOOM OUT buttons as well as the vertical scroll bar at the right of the window to review the report. Clicking PRINT on the Window Toolbar will display a Print dialog box. Adjust the printer options as needed and click OK to print the report, or click CANCEL to cancel the print job.

11.2.2 Sorting Estimate Reports

You can sort and print estimate reports with three different sort options: by Proposal Line Number, Item Description, or Item Code. The sorting will not interfere with the By Project and By Item formats.

You can temporarily change the sort order of either of the two estimate reports when you add the estimate (which will not carry into the generation process) or when you view the estimate reports in review mode. Printing will reflect the sort that appears on the screen.

To change the sort order of the estimate reports, from the VIEW ESTIMATE tab or the VIEW AMT BAL tab, click the SORT ORDER button.

Generate	Cont Status	SpellCheck Prin									
Add E	stimate (Est	imate No.: 1)	(Contract: 0000	01-00001)							
Gene	eral It	em Usage	Vouchers	View Estimate	View Amt Bal	View Insuff Mtl					
	AGENCY LDS0 HERE 344204929PM										
	DepartmentorTra	assportation					FieldMahager 3.4a				
	Contract:00001-00001, I-69 RECONSTRUCTION WARNER RD TO BEARDSLEE ROAD										
	Estimate Date	Estimate No.		nate Type	Electronic File Created	File Created Work Completed St					
	3/4/2004	1 Prime	Sem Contractor	i-Monthly	Yes	Yes Managing Office					
			ONTRACTING CO	IMPANY							
	Pre-Voucl	her Summar	y Vouch	er No. tem Pay		Stockpile Adjustment Do	ollar Amount				
	00001 A, I-69	RECONSTRUC	TION 000	1 \$29	467.50	\$3,200.00	\$32,667.50				
				(Does not inc	Total Estimate	1999 March 1997 March 1997	\$32,667.50				
	Item Usag	je Summary	F	Prop. Line Project Cate;	Project Item gory Line No. Type	Mod. No. Quantity	Dollar Amount				

A Pay Estimate Report Sort window (or, Amount Balance Report Sort, depending on the context) displays with the available sort options: Item Code, Item Description, and Prop. Line Number.

Report Sort Ord	
Item Description	on
ˆ Prop. Line	
C Item Code	
OK Cancel	Help

When opened, FieldManager selects the field on which the sort order is based. If you wish, select another sort order and click OK. FieldManager redraws the report based on the selected field. To leave the sort order unchanged, click CANCEL.

Note: The sort is temporary. It will last for the current tabbed dialog session only. For example, if the default sort order was by Item Description, and you change it to Item Code while in review mode, if you leave the estimate and return within review mode, FieldManager reverts the report to the default sort of Item Description.

You cannot change the sort order or report formatting during the following processes:

When you generate the estimate, which includes the printed copy if the user chooses to print the Pay Estimate Report and/or the Amount Balance Report during the generation process.

When you print from the estimate list with the Report List Print option.

11.3 Additional Print Features

The PRINT button may be used in several of the ways discussed in other sections of this chapter to print inquiries and reports, but it can also be used to print list window contents.

If you click PRINT while FieldManager software displays a list window, the contents of the list window will be printed.

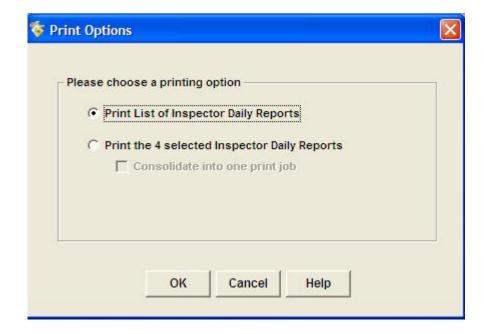
Delete Review Cont S		J <u>4</u> r Sort	Print Refro					
Gitems (Contract: 00001-00001)							-	
Project: <all> Category: <</all>	All> 👻							
Contractor: <all></all>		-						
Find Prop. Line:		Filter: <show all=""></show>						
Tind Prop. Line.		tem	Prop.	Quantity	Quantity	Authorized	1	
Item Description	Units	Code	Line	Placed	Paid	Quantity		
Bit Curb, Rem	m	2040003	0125	0.000	0.000	7.000		
Erosion Control, Silt Fence NEW ITEM	m	2080025	0085	0.000	0.000	100.000	-	
Mobilization, Max	LS	1500000	0080	0.000	0.000	1.000		
Slope Paving Header	m	8130007	0075	0.000	0.000	4.000		
Slope Paving, Conc	m2	8130003	0070	0.000	0.000	250.000		
Divider, Reinf Conc, Type 1	m2	8020060	0065	0.000	0.000	4,500.000		
Culv,Reinf Conc Ellip,CI HE 3,1920X1220	m	4010668	0060	250.000	250.000	300.000		
Culv, Cl 6, 2100 mm	m	4010163	0055	0.000	0.000	600.000		
Conc Pavt, Misc, Reinf, 320 mm	m2	6020163	0050	227.000	0.000	250.000		
Bit Mixture No. 1100T, 20AA	t	5020116	0045	0.000	0.000	7,370.000		
Bit Mixture No. 1100L, 20AA	t	5020115	0040	1,500.000	1,250.000	3,450.000		
Bit Mixture No. 1100T, 20A	t	5020111	0035	0.000	0.000	500.000		
Embankment, CIP	m3	2050010	0030	0.000	0.000	2,550.000		
Backfill, Swamp	m3	2050001	0025	200.000	200.000	3,450.000		
Fence, Rem	m	2040009	0020	0.000	0.000	1,200.000		
Culv, Rem	ea	2030004	0015	0.000	0.000	19.000		
Tree, Rem, 451 to 900 mm	ea	2020002	0010	0.000	0.000	39.000		
Clearing	m2	2010001	0005	1.535.000	1,535.000	25,900.000		

Clicking PRINT while FieldManager software displays a tab other than a VIEW tab will print the contents of the active area in the tab. Clicking PRINT while FieldManager software displays a VIEW tab will print a report.

Change IDR (IDR	: 3/1/2004, Steve Adar	nson, 1) (Contract: 0	0001-00001)			
General Cor	tractors Postings	Attachments	View			
AGENCY LOGO HERE		Inspector's I	Daily Report		3/4/2004 12:23 P	
Department of Transp	ortation				FieldManager 3.4	
Contract: 0000	-00001, I-69 RECONSTI	RUCTION WARNER RE	D TO BEARDSLEE	ROAD		
IDR Date	Day of Week	Sequence Na.	Import Date			
3/1/2004	Monday	1	N/A	David	d F. White	
1979.00 1970.00 1970.00	nspector's Initials-Nam	ie	Federal Project Number			
SA Steve Adam	son			STP 9776(001)		
		Prime Con				
		NTERSTATE CONTRA Revised I		Revision Date	Revision No.	
	ered By ve Adamson	SA, Steve Ada		3/3/2004 9:16 PM	1	
	nperatures	OA, DIEVE AUS	Weat		2	
Low: 10°C						
Low: 10 ° C	High: 20 ° C		AM Sunny PM C	louding Over		
Contractor placi	ng culvert 34-39 in AM. F	inishing wingwalls o	n culvert 24-28 in F	PM		

11.4 Printing Multiple Reports to PDF

New in this version of FieldManager is the ability to print multiple reports (IDRs, Diaries, Estimates to PDF as a single file. If more than one report has been highlighted when the print button is selected the following box will be displayed.



By selecting the Print the X Selected Reports option the Consolidate into one print job option will then become available. Checking this box will combine all of the reports into one file for print to PDF (your pdf printer will still need to be chosen as the printer when the print report box is displayed). The file will be created from top to bottom from the list window so reports should be sorted into the desired print order prior to the selection.

ose a printing o t List of Inspec	rte	
t the 4 selected Consolidate in		

12. Using Field Book Software

FieldBook[™] software is designed to automate the construction inspector's task of documenting the progress of construction. It operates on a laptop computer, allowing the inspector to record construction information at the project site. With FieldBook software, construction inspectors can use their laptop computers to perform a variety of tasks: record construction progress in Inspector's Daily Reports (IDRs), upload the IDRs to FieldManager[®] software in the field office, download updates from FieldManager, and access contract status information.

FieldBook software operates very much like FieldManager software, but with a more limited range of functionality. This chapter explains the differences between the FieldManager and FieldBook software applications. By taking into consideration the differences outlined here, this book can serve as a user's guide for FieldBook software;

12.1 Understanding Differences between FieldBook and FieldManager

The key differences between FieldBook and FieldManager software are detailed in this section, and references are given to other portions of this user's guide so the distinctions are more clear.

Unlike FieldManager software, FieldBook software does not have functionality in the following areas:

. Contract Documentation

. Daily Diaries

. Stockpiles

. Estimates

. Contract Modifications

FieldBook software has an extra column in its Contracts list window, but it has fewer menu options than FieldManager, and it has different capabilities as regards the Items, IDRs, and Materials functionality.

12.2 Contracts List Window

FieldBook software's Contracts list window is very similar to FieldManager software's, though there are a couple of significant differences between the two. FieldBook software's window has fewer buttons on the Application Toolbar, because FieldBook software's range of functionality is much more limited than FieldManager software's. FieldBook software also has a column labeled Import Date that is not present in FieldManager software.

File Edit	I <mark>Book (Contract</mark> View Utilities	Window Help		14 23	0				
Cļose	Import - FM Export -	FM Cont Status	T Filter	↓2 📄 Sort Print	Refresh				
Contractors	Find Contract II	D:						Fil <u>t</u> er: Show All>	· ·
	Contract ID 014407.00	and the second	and the second se	escription	ITS	Managing Office Comments	Import Date Closed 03/08/2011 No	Prime Contract PRATT & SONS, INC.	or
Jtems									
@ Materials									
10 Inguiries									
									>
Ready	<							Training	admin

The Import Date column lists the date of the last contract refresh that was performed. This date helps to ensure that an earlier refresh is not used to overwrite a more recent one. FieldBook software will inform you if this is attempted so you can prevent the overwrite from occurring.

FieldBook software does not have the Access column data that FieldManager software has. All contracts that can be accessed within FieldBook software are working contracts, not either kind of read-only contract.

12.3 Menu Options

While most of FieldBook software's menu options are identical to FieldManager's, such as the Utilities menu option of changing your password, there are a few which differ. For instance, FieldBook software's Import and Export options under the File menu allow you to import a contract from FieldManager and export IDRs to FieldManager, respectively. Understandably, this differs from FieldManager's operation, though the steps required for the processes are very similar.

Because FieldBook software does not have the full-featured system configuration capabilities of FieldManager, some of the options available via FieldManager's System Configuration tab window have been placed in FieldBook software's User Preferences tab window. By going to Utilities on the top menu and then down to User Preferences the following option tabs will be available:

ieneral	List Window	Entry Defaults	FieldNet	Import	Export	Toolbar	Inquiries	
Defa	ult Datasource	: fsdh		R	eference	e File Crea	tion Date:	Not Updated
Curre	ent Datasource	: Training			Referen	ce File Im	port Date:	Not Updated
				Agency	Configura	ation Crea	ition Date:	03/04/11 09:05:51
Def	ault User ID:		_			You	ur Us	ser ID
Defau Back	ult Database	\fieldbk\Databas	e\Backup				-	
₩ v	arn User Wher	Exiting Applica	tion					
	tomatically Get	Mail from Field	Vet When I	Logging I	n			
□ Au								
E Au								
E Au								
Γ Au								
Γ Au								

General Tab

General Tab – If an entry is made in the Default User ID is will automatically be applied to the FieldBook logon window and not have to be entered during every login – the password will still have to be entered.

neral	List Window	Entry Defaults	FieldNet	Import	Export	Toolbar	Inquiries
v	Include column	headers in a co	vqq				
				or more ro	ws from a	a list windov	w to the clipboard)
		w settings when n order, column wi			Res	set Setting	js
		ndow settings w n order, column wi			Res	set Setting	iz
Г	Save built-in filt	er settings whe	n closing li	st	Res	set Setting	is
			OK	Cancel	Hel	n	

List Window Tab

List Window Tab – Gives the user options on how lists will be displayed when leaving and reentering them.

🔶 User I	Preferences							×
General	List Window	Entry Defaults	FieldNet	Import	Export	Toolbar	Inquiries	
ltem	Posting					7		
	Station an		default to	last entr	У			
5	✓ Remarks f	ield default to la	st entry					
						10		
			ок	Cancel	Hel	p		

Entry Defaults Tab

Entry Defaults Tab – Checked options will be brought forward to new postings.

🔶 User 🛛	Preferences								×
General	List Window	Entry Defaults	FieldNet	Import	Export	Toolbar	Inquiries	1	
Last I	Account Stat Deactivation Da	tus: Deactivated ate:							
	FieldNe	et ID:							
	Passw	vord: *****	v	'erificatio	n: ****		_		
FieldNe	t Archive Direc	tory: c:\fieldbk\Ff	VArchive						
		Activ	ate Accou	nt					
Au	to Send Messa	iges: 🔽							
Auto R	letrieve Upon S	end: 🥅							
			ок	Cancel	Hel	p			

FieldNet Tab

FieldNet Tab – FieldNet is not being used to transfer information to and from FieldBook at this time so no information should be changed in this tab window.

🔶 User F	Preferences								
General	List Window	Entry Defaults	FieldNet	Import	Export	Toolbar	Inquiries		
		Location	Dele	te Locati	ion		Browse	1	
			ОК	Cancel	Hel	p			

Import / Export Tabs

Import / Export Tabs – Used to manage locations for import and export of files.

🔶 User Preferences	
General List Window Entry Defaults	FieldNet Import Export Toolbar Inquiries
C Left Top Right Bottom Floating	Application Toolbar Position C Left Top Right Bottom Floating None
	OK Cancel Help

Toolbar Tab

Toolbar Tab – Used to modify menu locations – changes made may make it more difficult when help is being provided via phone.

🔶 User I	Preferences							E C
General	List Window	Entry Defaults	FieldNet	Import	Export	Toolbar	Inquiries	
C It © P	Item Sort Orde em Description rop. Line em Code							
I¥ Savi	e Quick Querie	s Selections		Re	set Setti	ngs		
			ок	Cancel	Hel	p		

Inquires Tab

Inquires Tab – Used to change the default sort order of selected Inquiries

Other than FieldMan ager software having m ore information available via m enu options, there are only two other m enu option differences between FieldManager and Fiel dBook software, and both regard the Agency Master Reference Lists option found under the

Utilities m enu. First, in FieldBook software, the m aterial files, forms, and sources are reached through this option, whereas in FieldManager, they are reached through a separate Utilities menu option nam ed Maintain Material Files/Form s/Sources. This difference is because in FieldMan ager, the user can modify (maintain) the material files, forms, and sources, but in FieldBook software, the user can only view them. Second, FieldBook soft ware has only two of the five reference lists available in FieldManager software, Materials and Items.

12.4 Items Functionality

FieldBook software's and FieldManager software's Items functionality are practically identical, with the exception of changing item documentation. When changing an item in FieldManager, the fields on the DOCUMENTATION tab can be altered. In FieldBook software, however, none of these fields can be edited when changing an item.

12.5 IDRs Functionality

The main difference between FieldBook software's and FieldManager software's IDRs functionality is that FieldBook software has a column in the IDRs list window that does not exist in FieldManager software. This is the Status column, and it denotes the statuses of the IDRs listed.

Cjose	Add .	📆) Change	Selete Review	🐬 Generate	Cont St		
Ra Ba	Inspector Find Date:	or's Daily	Reports (Cont	ract: 0000	1-000	Filter: <show all=""></show>	
	Date	Initials	Inspector	Seq	Gen	Comments	Status
ms	03/03/2004	СМВ	Christine M Bla	ck 1	Yes	Heaw rain today - no work.	Refreshed
o	03/04/2004		Christine M Bla	ck 1	Yes	Heavy rain today - no work.	Refreshed
erials	03/07/2004	CMB	Christine M Bla	ck 1	Yes	Contractor working between station 12+323 and 12+884 to control th	Refreshed
	03/07/2004	RWO	Robert W Oswa	alt 1	Yes	Contractor clearing out lot 4-5. Tree removal starting in PM.	Refreshed
iries	03/08/2004	SA	Steve Adamsor	า 1	Yes	Contractor continuing to remove trees and property boundary fence.	Exported
	03/10/2004	SA	Steve Adamsor	า 1	No	Machine grading all day. Exterior boundary staking finished ahead o	New
	03/11/2004	SA	Steve Adamsor	า 1	No	Contractor finishing final clearing and grubbing - will start machine of	New

. Note: The data listed in the Status column of FieldBook software's IDRs list window is separate and distinct from the generation data listed in the Gen column.

In FieldBook software, each IDR has one of three statuses listed in the Status column.

New	The IDR has just been created in FieldBook software. A <i>New</i> IDR can be changed or deleted, but only by the same inspector who first entered it. When the IDR has a Generated status as well, the IDR can be exported to FieldManager.
Exported	Once the IDR has been exported to FieldManager, the status changes to <i>Exported</i> . At that point, the IDR cannot be changed or deleted by any inspector.
	Note: When you export IDRs to FieldManager software, FieldBook software automatically creates a backup file of those IDRs. The backup file is placed in the directory to which FieldBook software was installed in a folder named idrbak . If exported IDRs are accidentally lost or destroyed, you can retrieve the IDRs from the backup directory or you can recreate IDR files from within the FieldBook application.

On the Select IDRs to Export to FieldManager window, you can select the Include Previously Exported IDRs in List option. Selecting this displays all new and exported IDRs. When you reexport previously exported IDRs, any items, materials, itemmaterial associations, or itembreakdown associations that were previously exported (but have not yet been refreshed) will be automatically reexported. For assistance with this task, contact your system administrator. Refreshed After FieldBook software has received the contract data update file back from FieldManager software, the status of the exported IDRs changes to Refreshed. A refreshed IDR cannot be changed or deleted by any inspector. The number of days of refreshed IDRs and IDR attachments that are passed to FieldBook software is dependent upon the View IDRs in FieldBook for _____ days field and the View IDR Attachments in FieldBook for days field, found in FieldManager on the GENERAL tab of the Change Contract Documentation tab window. FieldBook software's overall item quantity information, however, which is refreshed along with the accompanying IDRs, is not dependent upon this field, and is available for viewing at any time.

12.6 Transferring Data between FieldManager and FieldBook

There will be times when you need to import Inspector's Daily Reports (IDRs) from FieldBook or export contract information to FieldBook.

12.7 Importing Inspector's Daily Reports

Inspectors in the field using FieldBook software submit electronic files containing IDR information according to a schedule established by your office. These files need to be loaded into FieldManager software.

These import files are named in the following way: **xxxxidr#.ebl**, where **xxxx** are the inspector's initials (underscores are used if the initials are less than four characters) and # is used to make the files unique.

To load an IDR file, choose Import from the File menu, and then choose IDRs from FieldBook from the Import submenu. (Alternatively, from the Contracts list window, click the IMPORT-FB button on the Window Toolbar.) As shown in Figure 12-8, FieldManager software displays the Import IDRs window.

lype or s wich to i	elect the loc nport.	ation of t	ne files you
AA			

Figure 12-8

Type the location of the file in the text box, including the drive and path where the file is located or choose one from the dropdown is it has been added through the User Preferences Import / Export. The first time you import IDRs, FieldManager software automatically enters the a:\ drive designation. If you store IDRs elsewhere, specify a different location. The next time you import IDRs, the last location specified displays in the text box. Click the down arrow next to the text box to display a list of file locations from which to choose. If the desired location is not there, click the BROWSE button to search.

When IDRs are successfully loaded, FieldManager software prints the Inspector's Daily Report, which includes an individual report for each IDR loaded. FieldManager software also displays the FieldBook Import Report. This report offers specific information about the data that was imported, including all the IDRs loaded for each contract, and, as applicable, any new unattached items, materials, or material/item associations. Further, if any errors are detected, these are also detailed within the FieldBook Import Report.

At the same time that FieldManager software produces the Inspector's Daily Report and the FieldBook Import Report, it also updates its contract files, creating an automatic update file of contract information in the same location from which the IDRs were loaded. Either mail or give this file to the inspectors on a portable storage disk so that they can update their contract information.

12.8 Exporting Contracts to FieldBook

Loading IDRs from a FieldBook file into FieldManager software provides the inspector with a file that updates the contract information in FieldBook. This file is created automatically during the import process, and it is named in the following way: **xxxxauto.ebl**, where **xxxx** are the inspector's initials (underscores are used if the initials are less than four characters). This file is placed in the same location from which the import file originated.

Another way to export contract information to FieldBook is to choose **Export** from the **File** menu, and then choose Contracts to **FieldBook** from the Export submenu. (Alternatively, from the Contracts list window, click the **EXPORT-FB** button on the Window Toolbar.)

This is necessary when first setting up FieldBook software. In addition, to the actual contract information, other sets of information are passed, including the configuration file information that was loaded into FieldManager software, and security information on which FieldBook software

relies.

FieldManager software displays a Select Contracts to Export to FieldBook window from which to select the contracts to export (see Figure 12-9).

Find Contract ID:		Filter: <show all=""></show>
Contract ID	Con	tract Description
00001-00001	I-69 RECONSTRUCTION WARNER	RD TO BEARDSLEE ROAD
38071-47760	DOUBLE CHIP SEAL	
50022-28460	BOULEVARD CONSTRUCTION	
63022-44814	EMERGENCY STRUCTURAL STEEL	L REPAIR
81063-38034	BITUMINOUS COLDMILLING, RESU	IRFACING AND BARRIER REPLACEMENT
82025-40522	DESIGN AND CONSTRUCTION OF	DECK REPLACEMENT
4		
۰ ۱		
L	erence Files in the Export	Use FieldNet
L	erence Files in the Export master file of items, materials, venc	The second se

Figure 12-9

Use the FILTER and SORT buttons to filter and sort the contracts. You can select more than one contract at a time, and you should also click a check box at the bottom of the window to include updated reference file information.

12.9 Exporting Reference Files to FieldBook

To export a reference file to **FieldBook**, choose **Export** from the File menu, and then choose **Reference Data to FieldManager/FieldBook** from the Export submenu. As shown in Figure 12-10, the Select Transfer File window displays.

Select Transl	ier File			 ? ×
Save in: 🧰	outbox	· ·	1 🖻 💆	8-6- 9-9- 8-8-
ackup				
, File <u>n</u> ame:	fmgiref.ref			Save
Save as tune:			-	Cancel
Save as <u>t</u> ype:			-	Cancel

Figure 12-10

Select the location, directory, and file name for the reference file to export. Reference files are denoted by a **.ref** extension. To save the file to the specified location, click OK, or click CANCEL to cancel the export.

Examining file c:\fi	ieldbk\inbox\015961.05.ebl	ce Comments	Import Date	Closed	
			12/10/2009	No	PIKE INDU
-			03/11/2010	No	N F LUCE,
Frror		-			
Error					
Error	No FieldBook import files were found in	the selected directory for the	datasource <fb_< td=""><td>fsdh>.</td><td></td></fb_<>	fsdh>.	

12.10 Contract Load from FieldManager to FieldBook Error

If an error message similar to the one pictured is experienced during the process of loading a contract from FieldManager into FieldBook then a new database will need to be created in FieldBook.

The first step in this process is to close out of the FieldManager software and then re-open it so that the Logon screen is available – do not enter a user name and password.

FieldBook login	
Enter User Informa	tion
Datasource: sdh	
User ID:	Datasource Button
Password:	
OK Cancel	Help

Click the **Datasource** button located at the top right of the logon screen. This will open up the Maintain FieldBook Datasources window.

🔶 Maintain FieldBo	ook Datasources	
Default Datasource: Current Datasource:		
Datasource	Database File Location	
fsdh	c:\fieldbk\database\fsdh\fieldbk2.db	
Add	Delete Set Default	Close

By clicking the Add button an Import Contracts window will open up.

Import Contracts	? 🛛
Look in: 🔁 fieldbk	- E 📸 💷 -
Contbak Tutorial database FNArchive Inbox Outbox temp	
File name: Files of type: Contracts(*.ebl)	Open Cancel

From within this window navigate to the location of the contract file that is being loaded from FieldManager – normally a flash drive is used. The naming convention used by FieldManager is the contract PIN followed by the "ebl" extension (012345.00.ebl). Highlight this file and click **Open**. This will open the Add FieldBook Datasource window.

In this screen you will be able to give the new FieldBook datasource a name. A name will be suggested in the text block and can be left as is or changed by the user – it must be a unique name for all datasources. When completed click OK – the datasource will be added and the contract will be imported into it.



Click **OK** on the Import window and then **Close** on the Maintain FieldBook Datasources window. This will bring you back to the FieldBook Login Screen where you will need to choose the datasource that you would like to login to by choosing it from the **Datasource** dropdown list. After that has been done you can enter your **User ID** and **Password** to Login. Remember that FieldBook ID's and Passwords for a contract are created in the FieldManager software and exported with the contract data so if a FieldBook user already has an **ID** and **Password** from a previous contract it may be a good idea to create and use the same ID in the new contract so that multiple login ID's will not need to be remembered.

Examples of IDR documentation and referencing.

Inspector's Daily Report

MDOT						4/20/2006 10:12 A FieldManager 4.
Contract: 0121	13.00, TRAINI	NG - EASTO	ON, PAVEMENT REP	ABILITATION		
IDR Date 4/19/2006	Day of Wedne		Sequence No. 2	Import Date N/A	· · · · · · · · · · · · · · · · · · ·	ident Engineer LIDBACK
SA Administra	Inspector's In tor	itials-Name)		Federal Project Numb STP-1211(300)X	per
			Prime Con MCGILLAN			
E	ntered By	1	Revised E	By	Revision Date	Revision No.
SA,	Administrator		SA, Administ	rator	4/20/2006 10:08 AM	2
Те	mperatures			We	ather	
Low: 17 ° (High:	23 ° C		Su	unny	
with of 3.3m an or ledge was in 304.131 All ex two lifts and ea density's in test	d and a averag counterd in this cavated areas w ch lift was comp ing file this date	e depth of 0 area All ex- vere back fil bacted to ma a. All grades	.75m. So 53.34 x 3.3 cavated materials wa lled with new material aximum densities with	x 0.75 = 124.0n s hauled off site hauled in from earth roller and bund to be within	t, the excavated area for n3. all excavation went to pete's Waste site. Dave's pit. The material by applying water. Ple n tolerance, see grade of	well and no rock I was placed in ase see

Contractors

Contractor's Name	Personnel	No.	Hrs.	Equipment	No.	Hrs.
MCGILLAN, INC.	excavator operator	1		dump truck	2	
	laborer	1		Rack body truck	1	
	roller operater	1		Roller	1	
	truck driver	3		small excavator	1	
				Water truck	1	

Item Postings

Project: 012113.00, TRAINING - EASTON, PAVEMENT REHABILITATION

Category: 0001, HIGHWAY ITEMS

Item/Material Description	Item Code	Prop.Lr	n. Location	Quantity Unit Brkdwn ID At
COMMON EXCAVATION - PLAN QUANTITY Contractor: MCGILLAN, INC. Item Remarks: See notes this IDR	203.2001	0050	Sta 2+025 to Sta 4+000	124.000 M3
DENSE GRADE CRUSH AGGRE. SUB - PLAN Contractor: MCGILLAN, INC. Item Remarks: See notes this IDR	304.131	0130	Sta 2+025 to Sta 4+000	124.000 M3
Reviewed By:	inature)			(Date)

Contract: 012113.00

IDR: 4/19/2006, SA, 2

Inspector's Daily Report

4/19/2006 1:31 PM

Contract: 01211	Dever	aak	Secure	No	Import D	nto I	Project / Proj	ident English		
IDR Date	Day of We		Sequence 1	e NO.	and a second second	mport Date Project / Resident En			er	
4/19/2006	Wednesda	·			N/A	- Eada				
	nspector's Initia	als-Name		- 1			eral Project Numb	er		
SA Administrato			D .1				STP-1211(300)X			
				me Cont						
Ent	ered By			evised B		R	evision Date	Revision N	lo.	-
	Iministrator									
	peratures					Weather				
Low: 15 ° C	5	26 ° C				Sunny				
Comments										
be in good condi	tion. Pipe connect	ctions wer		nd were	within allowa	able tole	rance. Back filled v	vith excavated	ł	
stockpiled @ cor be in good condi materials and co Contractors	tion. Pipe connect	ctions wer		nd were	within allowa	able tole	rance. Back filled v	vith excavated	1	
be in good condi materials and co	tion. Pipe connect mpacted in 8 incl	ctions wer		nd were today =	within allowa	able tole	rance. Back filled v	vith excavated	1	Hrs.
be in good condi materials and co Contractors Contractor's N	ion. Pipe connec npacted in 8 incl ame	ctions wer	al pipe used	nd were today = el	within allowa 25.6m	able tole	rance. Back filled v	vith excavated	1).	Hrs.
be in good condi materials and co Contractors	ion. Pipe connec npacted in 8 incl ame	ctions wer	Personn excavator laborer	nd were today = el operator	within allowa 25.6m <u>No.</u> 1 1	able tole	Equipment dump truck Rack body truck	vith excavated No 1 1	1 5. 1	Hrs.
be in good condi materials and co Contractors Contractor's N	ion. Pipe connec npacted in 8 incl ame	ctions wer	Personn excavator	nd were today = el operator	within allowa 25.6m <u>No.</u> 1	able tole	rance. Back filled v Equipment dump truck	vith excavated	1 5. 1	Hrs.
be in good condi materials and co Contractors Contractor's Na MCGILLAN, INC.	ion. Pipe connec mpacted in 8 incl	ctions wer	Personn excavator laborer	nd were today = el operator	within allowa 25.6m <u>No.</u> 1 1	able tole	Equipment dump truck Rack body truck	vith excavated No 1 1	1 5. 1	Hrs.
be in good condi materials and co Contractors Contractor's N MCGILLAN, INC.	ion. Pipe connec mpacted in 8 incl ame	ctions wer h lifts. Tot	Personn excavator o laborer truck driver	nd were today = el operator	within allowa 25.6m <u>No.</u> 1 1 1	Hrs.	Equipment dump truck Rack body truck	vith excavated No 1 1	1 5. 1	Hrs.
be in good condi materials and co Contractors Contractor's N MCGILLAN, INC.	ion. Pipe connec mpacted in 8 incl ame	EASTON	Personn excavator o laborer truck driver	nd were today = el operator	within allowa 25.6m <u>No.</u> 1 1 1	Hrs.	Equipment dump truck Rack body truck	vith excavated No 1 1	1 5. 1	Hrs.
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be in good condi materials and co Contractors Contractor's Na MCGILLAN, INC. Item Postings Project: 012113. Category: 0001 Item/Mater 375 MM CULVER Contractor:	ion. Pipe connect mpacted in 8 incl ame 00, TRAINING - , HIGHWAY ITEI ial Description T PIPE OPTION I MCGILLAN, INC.	EASTON	Personn excavator o laborer truck driven , PAVEMEN Item Code 603.16	nd were today = el operator r T REHA Prop.Lr 0210	within allowa 25.6m 1 1 1 1 BILITATION 1. Lo 3 locations	Hrs.	Equipment dump truck Rack body truck small excavator Quanti	No	1 	
be in good condi materials and co Contractors Contractor's Na MCGILLAN, INC. Item Postings Project: 012113. Category: 0001 Item/Mater 375 MM CULVER Contractor:	ion. Pipe connec mpacted in 8 incl ame 00, TRAINING - , HIGHWAY ITEI rial Description T PIPE OPTION I	EASTON	Personn excavator o laborer truck driven , PAVEMEN Item Code 603.16	nd were today = el operator r T REHA Prop.Lr 0210	within allowa 25.6m 1 1 1 1 BILITATION 1. Lo 3 locations	Hrs.	Equipment dump truck Rack body truck small excavator Quanti	vith excavated No 1 1 1 1 1 1 1	1 	
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Contract: 012113.00

IDR: 4/19/2006, SA, 1

Inspector's Daily Report

MDOT					4/18/2006 10:47 A	
MDOT					FieldManager 4.	
Contract: 01211	3.00, TRAINING - EAST	ON, PAVEMENT REP	ABILITATION			
IDR Date	Day of Week	Sequence No. Import Date Project / Reside		Day of Week Sequence No.		ident Engineer
4/18/2006	Tuesday	2	N/A	LENNY	LIDBACK	
1	nspector's Initials-Nam	e		Federal Project Numb	er	
SA Administrato	r			STP-1211(300)X		
		Prime Con	tractor			
		MCGILLAN	N, INC.			
Ent	ered By	Revised I	Ву	Revision Date	Revision No.	
SA, Ad	Iministrator	SA, Administ	rator	4/18/2006 10:40 AM	1	
Ten	nperatures		We	eather	01110100000000000000000000000000000000	
Low: 15 ° C	High: 23 ° C		Sunny			
Commonte						

Comments

639.19 Contractor set up field office today All electricity and 3 phone lines are hooked up and portable toilet is in place. At this time all is satifactory and will be paid @ 50%. The remaining will be paid in two increments of 25% each, 1 @ 50% completion and the other @ final acceptance of this project.

652.39 Traffic control plan submitted and found to be acceptable at this time. The contractor has installed all permenent signing at each end and all side roads of the project and it is found to be acceptable at this time. The estimated time for this oproject is 20 weeks so payment for this item will be made @ 5% increments.

656.35 SEWPCP has been approved and the contractor has begun to implement the plan as required by specification.

Item Postings

Project: 012113.00, TRAINING - EASTON, PAVEMENT REHABILITATION

Category: 0001, HIGHWAY ITEMS

Item/Material Description	Item Code	Prop.Lr	Location	Quantity Unit Brkdwn ID Att
FIELD OFFICE TYPE B Contractor: MCGILLAN, INC. Item Remarks: See notes this IDR	639.19	0640	On project in Park & Ride	0.500 EA
TEMP. SOIL EROSION AND WATER POLLUContractor: MCGILLAN, INC. Item Remarks: See notes this IDR	656.75	0670	on project	0.100 LS
WORK ZONE TRAFFIC CONTROL Contractor: MCGILLAN, INC. Item Remarks: See notes this IDR	652.39	0660	on project	0.050 LS
Reviewed By:(S	Signature)			(Date)

Contract: 012113.00

IDR: 4/18/2006, SA, 2

Inspector's Daily Report

4/19/2006 9:02 AM MDOT FieldManager 4.1a Contract: 012113.00, TRAINING - EASTON, PAVEMENT REHABILITATION Import Date Project / Resident Engineer Day of Week Sequence No. **IDR Date** 4/18/2006 Tuesday 3 N/A LENNY LIDBACK Federal Project Number Inspector's Initials-Name STP-1211(300)X SA Administrator **Prime Contractor** MCGILLAN, INC. **Revised By Revision Date Revision No.** Entered By 4/19/2006 9:00 AM SA, Administrator 4 SA, Administrator Weather Temperatures 14 ° C 22 ° C Sunny Low: High: Comments The contractor is on site today placing 300 ft of silt fence at station 10+125 to 10+325 rt. fence is paid for under SEWPCP plan. The sub contractor Asplundh was also on site and worked in the clearing area. This work was completed and and all brush and debre was chipped and disposed of at the contractors waste site. Contractors Personnel No. Hrs. Equipment No. Hrs. **Contractor's Name** bucket truck 1 ASPLUNDH TREE EXPERT, CO. Aborest 1 2 Chipper 1 laborer 2 Rack body truck 1 laborer MCGILLAN, INC. **Reviewed By:**

(Signature)

(Date)

Contract: 012113.00

IDR: 4/18/2006, SA, 3