

FieldManager.



Users Guide

Release 4.7a

Updated March 2011

Table of Contents

1. FieldManager Support Directory Minimum Required Usage

2. User Setup and Preferences

- 2.1 Login and Adding Users
- 2.2 User Preferences

3. General Information

- 3.1 District Number Error Message
- 3.2 Reference Data Update Message
- 3.3 Subcontractors Having subs added to database
- 3.4 Database Backup

4. Contract Load and Setup

- 4.1 Loading Contracts from Augusta
- 4.2 Viewing the Contracts List Window
- 4.3 Adding and Changing General Information Minimum Required for Estimates and Contract Modifications
- 4.4 Site Times, Breakdown, Site Events, R/O Distribution and Attachments

5. Working with Items

- 5.1 Viewing the properties of all the items
- 5.2 Changing and Adding Contractors Associated with an Existing Item
- 5.3 Deleting Contractors Associated with an Existing Item

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

- 6.1 Adding a New IDR (Inspector's Daily Report)
- 6.2 Adding General Information for a New IDR
- 6.3 Adding Contractor Personnel to a New IDR
- 6.4 Adding Contractor Equipment to a New IDR
- 6.5 Adding Item Postings to a New IDR
- 6.6 Viewing the New Inspector's Daily Report
- 6.7 Copying IDR Information to a New Inspector's Daily Report
- 6.8 Changing Existing Inspector's Daily Report
- 6.9 Changing General Information for an Existing IDR
- 6.10 Changing and Adding Contractor Personnel for an Existing IDR
- 6.11 Changing and Adding Contractor Equipment for an Existing IDR
- 6.12 Deleting Contractor Personnel from an Existing IDR
- 6.13 Deleting Contractor Equipment from an Existing IDR

- 6.14 Changing and Adding Item Postings for an Existing IDR
- 6.15 Generating the Inspector's Daily Report

7. Working with the Daily Diary

- 7.1 Adding a New Daily Diary Record
- 7.2 Adding General Information for a New Daily Diary
- 7.3 Site Time Information for a New Daily Diary
- 7.4 Changing an Existing Daily Diary Record
- 7.5 Deleting a Daily Diary Record
- 7.6 Generating a Daily Diary Record
- 7.7 Adding attachments to a Daily Diary or IDR.

8. Working with Stockpiles

- 8.1 Adding Stockpiles
- 8.2 Changing Stockpiles
- 8.3 Adding Stockpiles to several different PINs
- 8.4 Viewing the Stockpile Summary
- 8.5 Deleting Stockpiles

9. Producing Estimates

- 9.1 Understanding How FieldManager Creates Estimate/Voucher Information
- 9.2 Creating a Final Estimate
- 9.3 Adding Estimates
- 9.4 Adding General Information
- 9.5 Reviewing Item Usage
- 9.6 Viewing Vouchers
- 9.7 Viewing the Construction Pay Estimate Report
- 9.8 Generating the Estimate
- 9.9 Transfer estimate from your FieldManager to Augusta.
- 9.10 Reviewing an Estimate

10. Working with Contract Modifications

- 10.1 Adding New Contract Modifications
- 10.2 Adding General Information for a New Contract Modification
- 10.3 Increasing or Decreasing Item Quantities through a New Contract Modification
- 10.4 Adding New Items to a Contract via a New Contract Modification
- 10.5 Adding Time Extensions via a New Contract Modification
- 10.6 Viewing the New Contract Modification
- 10.7 Changing Existing Contract Modifications
- 10.8 Viewing the Revised Contract Modification
- 10.9 Generating a Contract Modification
- 10.10 Approving a Contract Modification
- 10.11 Reviewing a Contract Modification

11. Working with Inquiries and Reports

- 11.1 Viewing and Printing Inquiries
- 11.1.1 Viewing and Printing Inquiries Using Quick Query
- 11.1.2 Viewing and Printing Inquiries from the Inquiries List
- 11.2 Viewing and Printing Reports
- 11.2.1 Viewing and Printing Contract Reports
- 11.2.2 Sorting Estimate Reports
- 11.3 Additional Print Features

12. Using FieldBook Software

- 12.1 Understanding Differences between FieldBook and FieldManager
- 12.2 Contracts List Window
- 12.3 Menu Option
- 12.4 Items Functionality
- 12.5 IDRs Functionality
- 12.6 Transferring Data Between FieldManager and FieldBook
- 12.7 Importing Inspector's Daily Report
- 12.8 Exporting Contracts to FieldBook
- 12.9 Exporting Reference Files to FieldBook
- 12.10 Contract Load from FieldManager to FieldBook Error

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.



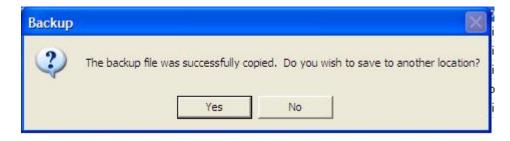
After clicking OK another message will appear asking if you would like to copy the backup to additional locations.



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.

| the second s | FieldManager (Contract: 014407.00) | | | | | | |
|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|----------------------------------------------------------------------------------------------------------------|--|--|--|--|
| File Edit | View Utilities Window Help | | | | | | |
| Cļose | E E E E E E E E E E E E E E E E E E E | N MailBox | | | | | |
| Ð | 🔯 Change Item (Item: CLEARING) (Contract: 01440 | 7.00) | | | | | |
| Dogu | General Documentation Materials Brea | akdowns Contractors | the second s | | | | |
| 2 | Item: 201.11, CLEARING | | | | | | |
| Co <u>n</u> tractors | Prop. Ln: 0010 Unit: AC Auth. Qty: 1.400 Type: ORIGINAL ITEM Unit Price: \$5,000.000 | Auth. Amt: \$7,000.00 Qty. Placed: 0.000 | | | | | |
| I <u>D</u> Rø | Pending Chgs: 0.000 | Qty. Paid: 1.340 | | | | | |
| 0 | | Item Contractors | | | | | |
| Diagies | Contractor Name | Vendor Number | | | | | |
| Jtems | | 00850 | | | | | |
| julins Ø | | 000403 | | | | | |
| Materials | | | | | | | |
| 1 | | | | | | | |
| Stockpiles | | | | | | | |
| <u>E</u> stimates | | | | | | | |
| ß | | | | | | | |
| Cont Mods | | | | | | | |
| 3 | | | | | | | |
| Misc Rpts | | | | | | | |
| ?O Inguiries | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | 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).

| 챻 Field | anager (Contract: 014407.00) |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| File Edit | View Utilities Window Help |
| Cļose | E E E E E E E E E E E E E E E E E E E |
| Cogtractors | Services and Cashed and Parket Print Parket Printmess Change Item (Item: CLEARING) (Contract: 014407.00) General Documentation Materials Breakdowns Contractors Item: 2011, CLEARING Unit Price: \$5,000.00 Pending Chgs: 0.00 Pending Chgs: 0.00 |
| | 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).

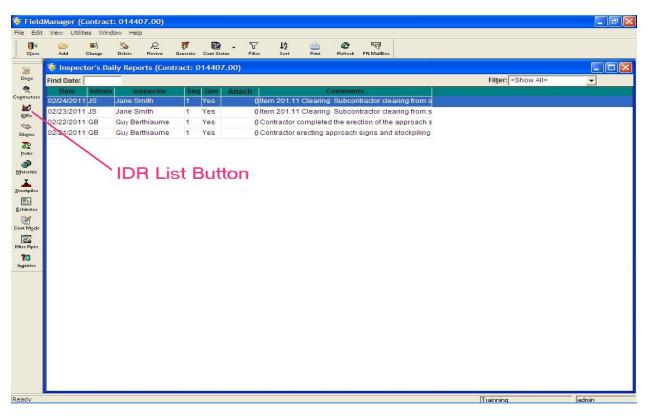


Figure 6-1 Inspectors Daily Reports List Window

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).

| 뜧 Field/ | Manager (Contract: 014407.00) | |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| File Edit | View Utilities Window Help | |
| D Close | 🖹 🔋 🌮 📴 - 🖌 📄 🐼 👦 SwerClose Swe Generate Cont Status SpeliCheck Print Refresh FM MailBox | |
| Dogu | Sections Outcome Operating Finite F | |
| 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).

| and the second se | Nanager (Contract: 014407.00) | - 7× |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| File Edit | View Utilities Window Help | |
| Close | Save/Close Save Generate Cont Status SpellCheck Print Refresh FN MailBox | |
| 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 | | |
| | | |
| | Add Personnel Delete Personnel Add Equipment Delete Equipment | |
| Ready | Trainning Idoe | |

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) | |
|---------------------------|----------------------------------------------------------|--------------------------------|
| File Edit | Edit View Utilities Window Help | |
| Cjose | | |
| 1 | | |
| Dogu 🚓 | deneral sternines rostings Attachments view | |
| Contractors | Site (Prime Contractor is in Italicized Bold) Vendor No. | <u></u> |
| ≧ I <u>D</u> R≠ | | |
| S Diagies | L&D SAFETY MARKING CORPORATION 000577 | |
| 2 | | |
| jtems | Dareonnal Number Hours Equipment | t Number Hours |
| <u>Materials</u> | | |
| Stockpiles | | |
| Estimates | | |
| Cont Mods | | |
| 2 | | |
| Misc Rpts | | |
| Inguiries | | |
| | to display text boxes | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | Add Personnel Delete Personnel | Add Equipment Delete Equipment |
| 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.

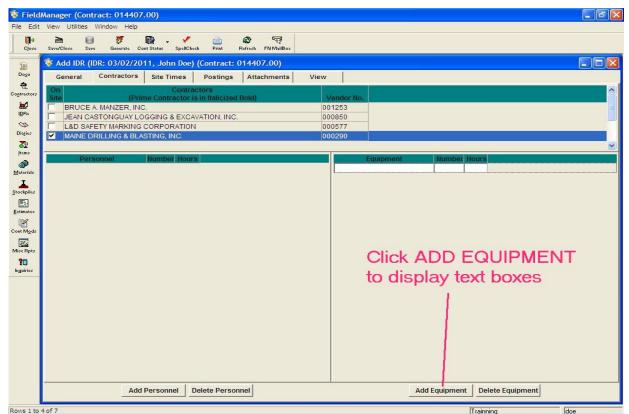


Figure 6-4 Add IDR Window – Contractors Personnel and Equipment

. 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 |
| | IC ROADWAY MEDIAN | CY | 502.341 | 0130 | 0.000 | 0.000 | 29.000 | 29.000 | 0.000 | \$460 |
| | / 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 |
| ROSION | CONTROL BLANKET | SY | 613.319 | 0220 | 0.000 | 378.100 | 500.000 | 500.000 | 0.000 | \$1 |
| | | | | | | | | | | × |
| | | | | | 12 | | | | | > |
| | | S | elect F | ilter | Sort Ca | ncel Help | D | | | |
| | | | | and the second s | | | | | | 11. |

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).

| D ø Cjose | ` 📔 🌮 📴 - 🖍 🛅 🗞 | MailBox | | |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|-------------------|---|
| 1 | 🍫 Change IDR (IDR: 2/23/2011, Jane Smith, 1) (Contract: 01 | 4407.00) | | |
| Dogu | General Contractors Site Times Postings Attachr | nents View | | |
| ntractors | | | | 1 |
| | | | | |
| <u>D</u> Rø | | | | |
| 🥸 iagies | Inspector's D | | | |
| | MaineDOT | | 3/2/2011 1:27 PM | |
| tems | Maine Department of Transportation | | FieldManager 4.7a | |
| ø | Contract: 014407.00, RUMFORD, HIGHWAY IMPROVEMENTS | | | |
| iterials T | | | lesident Engineer | |
| ckpiles | | GNING CONTRACT MOD | YOUR NAME | |
| <u>.</u> | JS Jane Smith | HP-1440(700)X | None | |
| timates B | Prime Contr PRATT & SON | | | |
| 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.

| C. LOSS STREET | Manager (C View Utilitie | States and States and | and the second | | | | | | | | | | | | _ 8 |
|---------------------------------|-----------------------------|-----------------------|------------------------------------------------------------------------------------------------------------------|---------------------|----------|-----------------------------------|--------------------|--------------------------|---------------|----------------------------------|-----------|------------------------|------------------------------|-----------|-----|
| D ¢ Cjose | Add | 🔟) Change | Solete | <u>).</u> Review | | Cont Status | V Filter | ↓ <mark>≵</mark> Sort | Print | Refresh | FN MailBo | x | | | |
| | 🌾 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 | | | |
| jies 🛛 | 02/21/2011 | GB | Guy Ber | rthiaume | 1 | Yes | 0 0 0 | ontractor | erecting | approach | signs an | d stockpiling | | | |
| nates Mods Rpts irries | | | | v n | iew IDR. | IDR function \ All of the item | n and mate | erial quan e selected | tities will b | w in Add m e set to 0 i No | n the new | ppy the conten IDR. | is of the selected IDR to th | 2 | |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |

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).

| 뜧 Field | Manager (Con | tract: 01440 | 7.00) | | | | | | | | | | - 6 🛛 |
|-------------------------------------|--------------------------------------------------------------|-------------------------------------------------|---------------|---------------------|--------------------------------------|-----------------------------|--------------------------------------------------|-------------|-------|-------------------------|-----------|--------------------|-------|
| File Edit | View Utilities | Window Help | | | | | | | | | | | |
| Cjose | Save/Close Sa | | ltem Doc | Cont Status | SpellCheck | Print Refrest | FN MailBox | | | | | | |
|) Dogu | Change II General | DR (IDR: 2/24 | 1 | Jane Smit Times | t <mark>h, 1) (Co</mark> Postings | ntract: 01440 Attachment | 1 | r. 1 | | | | | |
| Contractors IDRs Disgies | Prop. Ln: 038 Type: ORIC Project: 014 Category: 000 | SINAL ITEM 407.00, RUMFOF 1, PROJECT ITEN | Ca RD, TUR | Uni atg. Pending | The second second second second | 5.700 Ca 100 | atg. Auth. Ar tg. Qty. Place Catg. Qty. Pa | ed: 23.500 | 50 | | | | |
| Jtems | Find Item Des | cription: | - 1 | Itom | Drop | | Quar | | _ | | - | | - |
| jvenis Ø | ltem | Description | | Item Code | Prop Line | Location | Quar Pos | | oject | Catg | Breakdown | Contractor | |
| Materials | FLAGGER | | | 652.38 | | various | | .000 01440 | | 0001 | | PRATT & SONS, INC. | |
| <u>Stockpiles</u> | REMOVING SI | INGLE TREE 1 | OP ON: | 201.23 | 0020 | various | 2 | 2.000 01440 | 08.00 | 0001 | | PRATT & SONS, INC. | |
| Estimates Cont Mgds Micc Rpts | | | | | | | | | | | | | |
| | | | | | [| Add Posting | Chang | e Posting | Delet | te <mark>Posting</mark> |) | | |
| Rows 1 to | 2 of 2 | | | | | | | | | | | Trainning | doe |

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).

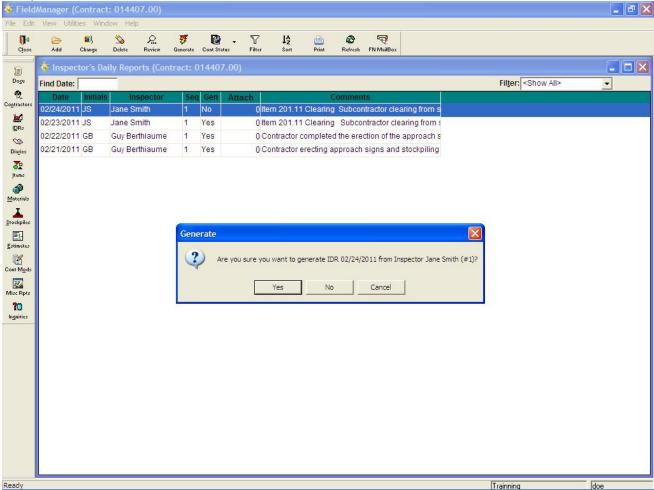


Figure 6-10. IDR Generate Message

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).

| | lanager (Co <u>V</u> iew <u>U</u> til | | | | | | | | | | |
|------------------------|------------------------------------------|----------|----------|--------------|---------------|-------------|--------------------|--------------------|------------|-----------------|----------------------------------|
| Cjose | Add | E Change | Delete | P. Review | 🐬 Generate | Cont Status | T Filter | J <u>A</u> ≌ort | erint (| R efresh | |
| Ē | Daily D Find Date: | | ontract: | 00001-00 | 001) | | | | | Filte | - C × |
| Do <u>c</u> u | Date | Initials | s | Author | Ger | | | | C | omments | |
| I <u>D</u> R≠ | 03/02/200 | | | Adamson | No | | | emoval at | t property | boundaries | s. Contractor was working on the |
| S Diagies | 03/01/200 | 14 SA | Steve A | \damson | Yes | Clearing | 10ts 4-7 | | | | |
| <u>7</u> | | | | | | | | | | | |
| ļtems Ø | | | | | | | | | | | |
| <u>Materials</u> | | | | | | | | | | | |
| Stockpiles | | | | | | | | | | | |
| E. | | | | | | | | | | | |
| <u>E</u> stimates | | | | | | | | | | | |
| Cont Mods | | | | | | | | | | | |
| Misc Rpts | | | | | | | | | | | |
| ?O Inguiries | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| Daily Diary | generated | | | | | | | | | | |

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).

| Eile Edit | lanager (Contract: 000) View Utilities Window | | | _ & × |
|-------------------------------------------|--------------------------------------------------|------------------------------------------|---------------------------------------------------|----------------|
| Cjose | | 🖻 🖬 🚽 💉 nerate Cont Status SpellCheck | Print Refresh | |
| Dogu | Add Daily Diary (Da General Site Time | | eve Adamson) (Contract: 00001-00001) | |
| ior: | Date/Time Entered: Entered By: Generated: | Steve Adamson | Revised By: Revision Date: Revision Number: | |
| Diagica St Itoma | | 03/03/2004 🔡 SA Steve Adamson | IDR by RWO Ungenerated IDR by JRM Sunrise: | |
| Materials L Stockpiles Estimates | High Temperature: Weather: Comments: | ° C * F | Sunset: | — |
| Cont Mods Misc Rpts | | | | |
| ? D Inguiries | | | | |
| Add a dailu | | Bring in <u>T</u> emperatures | Bring in Weathe | r and Comments |

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).

| | 1anager (Conl | | |)1) | | | | | | _ 8 × |
|-------|---------------------------------|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|--------|--|-------|
| 10 | : <u>V</u> iew <u>U</u> tilitie | s <u>W</u> indow | | - | | | | | | |
| Cjose | Cont Status | SpellCheck | e Print | Refresh | | | | | | |
| | | kpile Wiza Idd stock Ti in in it it V | Print ard (Con pile wiza he stock a an inter involves lick on t r previou me durir Ahen all | Refresh tract: 000 and cpile wizar active me s the follow 1. Descri 2. Fill in t 3. Assign each if 4. Assign to each is step. Yn og this pro- | d lets you crea athod. wing four steps be the stockpil he transaction i items to the st em. i the recovery f | :: amount, tockpile and factor or reco tons to visit f > "Cancel" but I adding the s apleted, click | dollar amo overy quam the next tton at any stockpile. | tity | | |
| Ready | | | | | Cancel | < <u>P</u> rev | Next > | Finish | | |

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).

| | lanager (Cont | | | |
|-----------------------------------------------------------------------|------------------------------------------|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------|-----------------------------|
| Eile Edit | | | | |
| Cjose | Cont Status S | | 🖨 🐼 Print Refres | |
| Close Close Dogu Dogu Diaglios Stockpiles Estimates | Add Stock Describe th 1. 5 2. 1 | c pile Wizard I e stockpile Select the s Fill in a com ck on the 'C | d (Contract: stockpile typ ment for the Cancel' butto | |
| Cont Mode Misc Rpts ?O Inguiries | Stockpile D Stockpile (| Description: Comments: | 10 | Cancel < Prev Next > Finish |

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).

| 😡 FieldM | lanager (Contract: 0 | 0001-00001) | |
|----------------------------------------------------------------|-------------------------------------------------|-----------------------------|------------------------------------------------------------------------|
| <u>Eile E</u> dit | <u>View</u> <u>U</u> tilities <u>W</u> ind | dow <u>H</u> elp | |
| Cjose | Cont Status SpellChec | k Print Refre | h |
| Dogu Dogu IDBa | - Describe the tran 1. Specify | saction y the Transactio | |
| Diagies | 3. Fill in a | comment for th | |
| Jtems | | | n to cancel adding the stockpile, or n to proceed to the next step. |
| Materials Materials Stockpiles Estimates Cont Mods | | | |
| Misc Rpts | Transac Transaction Dollar Transaction Co | | 2004 |
| | | 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).

| | Manager (Contract: 00001-00001) 🔤 🗗 t View Utilities Window Help |
|--------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| Cjose | Cont Status SpellCheck Print Rofresh |
| Dogu Dogu Diges Diges Motorials Estimates Estimates Miles Ripte Miles Ripte Miles Ripte | Add Stockpile Wizard (Stockpile Aggregate #1) (Contract 00001-00001) |
| | Add Item Delete Item |
| | Step 3 of 4 Cancel < Prev Next > Finish |

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: |] | | |
|-----------------------------------------|-------|------------------|---------------|--------------------|---------|
| Item Description | Units | ltem Code | Prop. Line | Quantity Placed | Quant A |
| 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 | |
| ↓ | | | | | |

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.

| aic <u>v</u> i | /iew Uti | lities | <u>W</u> indow | Help | | | | | | | | | |
|-------------------|------------------|--------------------|--------------------|----------|-------------------|-----------------------|--------------------------------------------------|-------|------------|-----------|--------------------------------------------|---------------------------|------------|
| - >e C | Cont Status | + Spel | / ICheck | erint (| Refresh | | | | | | | | |
| | Assign i | tems | to the s | stockpil | | ollar an | te #1) (Cor nounts to ea | | 0001-00001 |) | | | |
| | Prop. Ln Type | : 0035 : Origin | U nal Item | nit: t | | Catg. / U Pendi | Auth. Qty: 50 Init Price: \$2 ng Chgs: 0.1 | 3.000 | Catg. | Qty. Plac | mt: \$11,500.00 ed: 0.000 aid: 0.000 | | |
| C | ategory | c 0001, | FED 80 | %/STAT | = 1 <i>5%/</i> CO | DUNTY 5 | % Item | Ргор. | | | Assigned Dollar | Pending | Authorized |
| | | Item | Descr | iption | | Unit | Code | Line | Project | Catg. | Amount | Changes | Quantity |
| B | it Mixtur | - bla | 11001 | 2000 | | + | 5020115 | 0040 | 00001A | 0001 | \$0.00 | 0.000 | 1,250.00 |
| | | | | | | | | 1 | | 1 | | | |
| | 9it Mixtur | | | | | t | 5020111 | 0035 | 00001A | 0001 | \$0.00 | 0.000 | |
| 5 5 8 8 | | | | | | t | | 1 | | 1 | \$0.00 | 0.000 | 500.00 |
| | 9it Mixtur | e No. | 11007, | 20A | 500.00 | | 5020111 | 0035 | | 0001 | | 0.000 | |
| s s do 1 | it Mixtur | e No. | 1100T, Dilar Ar | 20A | 500.00 | | 5020111 | 0035 | 00001A | 0001 | | 0.000 <u>A</u> dd Item | |

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 | | | | |
| | | tem is in more t the Category | | | - | | 0000 | | |
| Find Project: | | | | Fil <u>t</u> er: <8 | now All> | | - | | |
| Category Description | Catg | Project | Proj | ect Description | | Quantity Placed | Qu | | |
| FED 80%/STATE 15%/COUNT | 0001 | 00001A | 1-69 REC | ONSTRUCTION | 1 | 0.000 | | | |
| 100%/VILLAGE OF SHAFTSBU | 0002 | 30001A | 1-69 REC | ONSTRUCTION | 1 | 0.000 | | | |
| | | | | | | | | | |
| <u></u> | | | | 23 | | | | | |
| | -+ 011 | Filter | Sort | Cancel | Help | | | | |
| Select Select | v en l | I UTCI | SOL | Cancer | <u>n</u> eno | | | | |

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.

| | 1anager (Contract: 00001-00001) | | | | | | | | _ 8 × |
|------------------|------------------------------------------------------------|-----------------------|-----------------|----------------|----------------|-------------------|-----------------|------------------|-------------|
| <u>Eile Edit</u> | <u>V</u> iew <u>U</u> tilities <u>W</u> indow <u>H</u> elp | | | | | | | | |
| Cjose | Cont Status SpellCheck Print Ref | | | | | | | | |
| | Add Stockpile Wizard (Stockpil | e Aggrega | te #1) (Cont | ract: O(| 0001-00001 |) | | | _ 🗆 × |
| Dogu | Assign items to the stockpile an | d dollar am | ounts to eac | ch item | | | | | |
| | Item: 5020111, Bit Mixture No. 11 | 00T, 20A | | | | | | | |
| I <u>D</u> Rø | Prop. Ln: 0035 Unit: t | | with. Qty: 500 | | | | mt: \$11,500.00 | | |
| 0 | Type: Original Item | 2014년 - 2012년 - 2077년 | nit Price: \$23 | | | | ed: 0.000 | | |
| Diaries | Project: 00001 A, I-69 RECONSTRUC | | ng Chgs: 0.00 | 00 | Catg | , Qty. Р | aid: 0.000 | | |
| 20 | Category: 0001, FED 80%/STATE 159 | | % | | | | | | |
| Items | | | Item | Ргор. | | | Assigned Dollar | Pending | Authorized |
| | Item Description | Unit | Code | Line | Project | Catg. | Amount | Changes | Quantity |
| Materials | Bit Mixture No. 1100L, 20AA | t | | 0040 | 00001A | 0001 | \$250.00 | 0.000 | 1,250.000 |
| I | Bit Mixture No. 1100T, 20A | t | 5020111 | 0035 | 00001A | 0001 | \$250.00 | 0.000 | 500.000 |
| Stockpiles | | | | | | | | | |
| <u>_</u> | | | | | | | | | |
| Estimates | | | | | | | | | |
| 2 | | | | | | | | | |
| Cont Mods | | | | | | | | | |
| 34 | | | | | | | | | |
| Misc Rpts | | | | | | | | | |
| 20 | | | | | | | | | |
| Inguiries | | | | | | | | | |
| | Transaction Dollar Amount: \$500. | 00 | Dellar An | nount I | eft to Distril | ter to | 00 | | <u>•</u> |
| | Transaction Dollar Amount: \$500. | 00 | Dullal An | nount | | Jule: 5 0. | .00 | | |
| | Assigned Dollar Amount: 250.00 |) | | | | | | <u>A</u> dd Item | Delete Item |
| | Step 3 o | f4 _ | <u>C</u> ancel | < <u>P</u> rev | <u>N</u> ext > | Fin | ish | | |
| Bows 1 to | 2 of 2 | | | | | | | | |

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).

| · · · | × . | a | | | | | | | | | |
|------------------------|--------------------------|-----------|---------|--------------|------------------|-----------------------------------------------------------------------------------------------------------------|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|----------------------|------------|
| e Cont Status | SpellCheck | | Refresh | waasta #13 | (Coptu | | 00001) | | | | - 0 |
| - Assign the | | | | | | | 00001) | | | | - 121 |
| - | 20115, Bit M | | | | , ouom | | | | | | |
| Prop. Ln: 00 | | nit: t | | atg. Auth. Q | tv: 1.250 | | Cato, A | uth. Amt: \$27,500. | 00 | | |
| | iginal Item | | | Unit Pric | | | | y. Placed: 0.000 | | | |
| | - | | Catg. F | Pending Chg | js: 0.000 | 1. The second | Catg. | Qty. Paid: 0.000 | | | |
| Project: 00 | | | | | | | | | | | |
| Category: 00 | 01, FED 809 | %/STATE 1 | 5%/COU | | _ | _ | _ | | | | - |
| House | Descriptio | | Unit | Item Code | Prop. Line | Project | Catg. | Assigned Dollar Amount | Recovery Factor | Recovery Quantity | Pen Cha |
| Bit Mixture N | | | Offic | 5020115 | 0040 | 00001A | 0001 | \$250.00 | Factor | Quantity | Cita |
| Bit Mixture N | | | L | 5020115 | | 00001A | 0001 | \$250.00 | | | |
| | | | | | | | | | | | |
| | | | | | | | | | 1 | | |
| 1000 CONTRACTOR (1000) | ollar Amou overy Fact | or: | 0 | | stoc | kpie paymer | t will be i | odollar amount that the recovered per unit of the standard per unit of the standard per unit of the standard per stand | f item | | |

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.

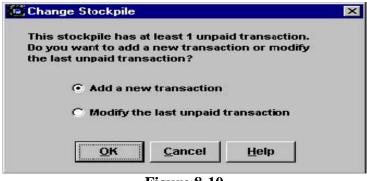


Figure 8-10

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).

| | erint | Refresh | | | | | | | | |
|-------|------------|------------------|------------------------------------------------------|------------------------------------|--------------------------|--------------------|----------------------|-------------------------|------------|---------|
| | Stoc | cpile Sum | mary By Stockpile | (Contract: 0000 | 01-00001) | | | | | - 1 |
| ШE | | | | Sto | ckpile Summary by Stockp | ile | | | | _ |
| | | of Transportatio | - | | | | | | 3/3/2 | 200 |
| | - | | | | | | | | Field | Ner |
| C C | ontract | 00001-000 | 01, I-69 RECONSTRUC | TION WARNER RD 1 | O BEARDSLEE ROAD | | | | | |
| | - | | escription: Aggregate # | 1 | | | | | | |
| | Stockpil | | <pile ag01<br="" type:="">Remaining: \$500.00</pile> | | | | | | | |
| | oroonpri | | Comments: 1/4" Aggrega | te for Bit Mix | | | | | | |
| e 0 | | | lo. 1100L. 20AA | | Code: 5020115 | Prop. Line: 0040 | | | | |
| | | | | 0.05 | Code: 5020115 | Prop. Line: 0040 | | | | |
| | | | A, I-69 RECONSTRUCTI FED 80%/STATE 15%/CI | | | | | | | |
| s | Seq. No | Action Date | Action | Total Transaction Dollar Amount | Transaction Comments | Recovery Factor | Recovery Quantity | Action Dollar Amount | Est. No | Vo |
| | 1 | 3/3/2004 | Transaction | 500.00 | Intial Shipment | 20.0000 | 12.500 | 250.00 | | |
| ±o | | | Amount Remaining: | | | | | \$250.00 | | |
| :0 | ttem: | Ait Mixture N | lo. 1100T, 20A | | Code: 5020111 | Prop. Line: 0035 | 2 | | | _ |
| | | | A I-69 RECONSTRUCTI | ON | | | | | | |
| | | | FED 80%/STATE 15%/C | | | | | | | |
| | Seq. No | Action Date | Action | Total Transaction Dollar Amount | Transaction Comments | Recovery Factor | Recovery Quantity | Action Dollar Amount | Est. No | Ve N |
| | 1 | 3/3/2004 | | 500.00 | Intial Shipment | 20.0000 | 12.500 | 250.00 | | |
| | | | Amount Remaining: | | | | | \$250.00 | 8 | |
| | | | | | | | | | | |

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).

| Select Estimate | Date and Type |
|--------------------|---------------------------------------|
| Select an estimate | e date and type for the new estimate: |
| 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**

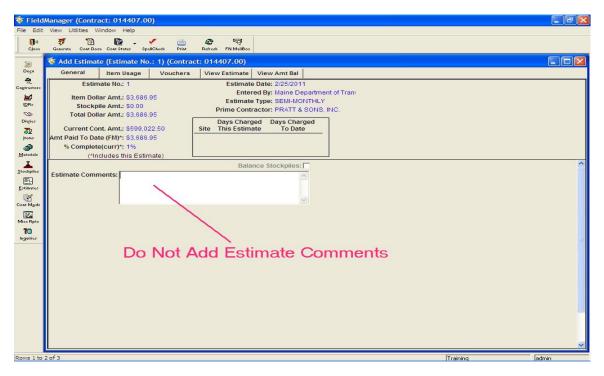


Figure 9-2. Estimate General Tab

. 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).

| | Manager (Contract: 014407.00 |)) | | | | | | | | | |
|--------------------|-----------------------------------------------------|----------------|--------------|------------|-----------|---------------|--------------------|---------------------------|----------------|---------------------------|-------|
| 11. | View Utilities Window Help | | 201120 | | | | | | | | |
| Cļose | | int Refresh | FN MailBox | | | | | | | | |
| Ð | 뜧 Add Estimate (Estimate No. | .: 1) (Contrac | ct: 014407. | 00) | | | | | | | |
| Dogu | General Item Usage | Vouchers | View Estin | nate Vie | ew Amt B | al | | | | | 100 C |
| ntractors | Item: 652.34, CONE Prop. Ln: 0350 Unit: EA Auth. | 04-11-020 | 8ab | Amt: \$798 | | 04.0 | laced: 36.000 | | | | |
| | Type: ORIGINAL ITEM Unit Pri | | | Chgs: 0.0 | | | . Paid: 89.000 | | | | |
| I <u>D</u> Rs | Find Item Code: | | | | | | | | | | |
| S Diagies | | ltem | Prop. | Insuff. | Overrun | in the second | Qty. this | Dollar Amount | Allowable | Allowable | |
| 3 | Item Description | Code 652.34 | Line 0350 | Matl. | Flag V | Atten. | Estimate 36.000 | this Estimate \$684.00 | Qty. 36.000 | Dollar Amount \$684.00 | |
| ļtems | CONSTRUCTION SIGNS | 652.35 | 0360 | Г | Γ | Г | 144.000 | \$1,584.00 | 144.000 | \$1,584.00 | |
| ø | FLAGGER | 652.38 | 0380 | Г | Γ | Г | 23.500 | \$368.95 | 23.500 | \$368.95 | |
| <u>M</u> aterials | MAINTENANCE OF TRAFFIC | 652.36 | 0370 | | | | 1.000 | \$50.00 | 1.000 | \$50.00 | |
| <u>S</u> tockpiles | REMOVING SINGLE TREE TOP | 201.23 | 0020 | | | | 4.000 | \$1,000.00 | 4.000 | \$1,000.00 | |
| Ē. | | | | | | | | | | | |
| <u>E</u> stimates | | | | | | | | | | | |
| ß | | | | | | | | | | | |
| Cont Mods | | | | | | | | | | | |
| Misc Rpts | | | | | | | | | | | |
| 20 | | | | | | | | | | | |
| Inguiries | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | 1 | Review/(| Change | | | | |
| | | | | _ | | _ | | | | | |
| Rows 1 to 5 | 5 of 5 | | | | | | | | Train | ing | admin |

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).

| 챻 Field | IManager (Co | ntract: 014407 | .00) | | | | | | | |
|-------------------------|------------------------|---------------------|-----------------|-----------|------------------------|--------|---------|-----|-------|-------|
| File Edit | | s Window Help | <u>ک</u> ف | R. | | | | | | |
| Close | 3,4 Generate Con | | | | | | | | | |
|) Dogu | | mate (Estimate I | , | | | 1 | | | | |
| ÷2 | General | Item Usage | Vouchers | View Esti | nate View Amt | | Create | | | |
| Contractors | Project 014407.00 | Proj RUMFORD, TU | ect Description | | Payment \$1,113.45 | Number | Voucher | | | |
| | 014408.00 014409.00 | RUMFORD, INT | ERSECTION IMP | PROVEMEN | \$2,329.00 \$244.50 | 0001 | V V | | | 1 |
| Diagies | 014409.00 | RUMFORD, SLC | JPE RECONSTR | | 5244.50 | 10001 | | | | |
| Jtems | | | | | | | | | | |
| @ Materials | | | | | | | | | | |
| 1 | | | | | | | | | | |
| <u>Stockpiles</u> | | | | | | | | | | |
| <u>E</u> stimates | | | | | | | | | | |
| Cont Mods | | | | | | | | | | |
| Misc Rpts | | | | | | | | | | |
| ? O Inguiries | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Rows 1 to | 5 of 5 | | | | | | | Tra | ining | admin |

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).

| Generate (| Cont Status SpellCheck Pr | | 🕈 🦁 | × | | | | | | | | |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|---------------|----------------------------------------|----------|--------------------------------|----------------------------------|------------------------------------------------|-----------------------------------------------------------------|---------------------------------------------|--|--|
| 🖡 Add E | stimate (Estimate No.: | 1) (Cor | ntract: 014 | 407.0 | 0) | | | | | | | |
| Gener | ral Item Usage | Vouch | ers View | Estim | ate 🔪 | liew A | umt Ba | 1 | | | | |
| | MaineDOT MaineDot | | Constr | uctio | n Pay | Estir | nate | Report | | 318/2011 9.51 AM FileIdManager 4 7a | | |
| | Contract: 014407.00, RU | MFORD, H | IGHWAY IMP | ROVEM | ENTS | | | | | | | |
| | Estimate Estimat No. Date 1 2/25/20 | 1 | Entered By | -4 T | | stimate Type -MON | | YOUR PROG | Managing Office | J | | |
| | All Contract | onstructi | on Prime | Contra | ctor | | | | | | | |
| | All Contract | tatted Da | | & SON | IS. INC. | | | | | | | |
| | Work Completed | racted Da | te PRATI | & SON | IS, INC. | | | | | | | |
| | Work Grinpfeted | Cited Da | te PRATT | A SON | IS, INC. | ltem Type | Mod. No. | Quantity | Item Price | Dollar Amount | | |
| | Work distributions of the second seco | Cited Da | Ite PRATT | & SON | IS, INC. | Item | Mod. | | 22 | Dollar Amount \$500.00 | | |
| | Work distributions of the second seco | CY RD, TUR ITEMS Uni DP EA EA | te PRATT | 00000000000000000000000000000000000000 | IS, INC. | Item Type 00 00 | Mod. No. 000 | Quantity 2.000 12.000 | Item Price 250.00 19.00 | \$500.00 \$228.00 | | |
| | Work distributions of the second seco | CY RD, TUR ITEMS Uni DP EA EA | te PRAT | 8 SON | IS, INC. | Item Type 00 00 | Mod. No. | Quantity 2.000 12.000 0.330 | Item Price 250.00 | \$500.00 | | |
| | Work dimpleted | CY RD, TUR ITEMS Uni DP EA EA | te PRAT | 00000000000000000000000000000000000000 | S, INC. | Item Type 00 00 | Mod. No. 000 000 | Quantity 2.000 12.000 | Item Price 250.00 19.00 | \$500.00 \$228.00 | | |
| | Work distributions of the second seco | ry RD, TUR TITEMS Uni DP EA EA EA CD | te PRAT | 000 STRU | S, INC. | Item Type 00 00 00 | Mod. No. 000 000 000 | Quantity 2.000 12.000 0.330 | Item Price 250.00 19.00 50.00 15.70 | \$500.00 \$228.00 \$18.50 | | |
| | Work distributions of the second seco | ry RD, TUR I ITEMS Uni OP EA EA CD HR | te PRAT | 000 STRU 0020 0350 0380 | IS, INC. | Item Type 00 00 00 | Mod. No. 000 000 000 | Quantity 2.000 12.000 0.330 23.500 | Item Price 250.00 19.00 50.00 15.70 tegory 0001: | \$500.00 \$228.00 \$18.50 \$368.95 | | |

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.

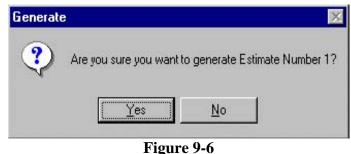


Figure 7-0

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).

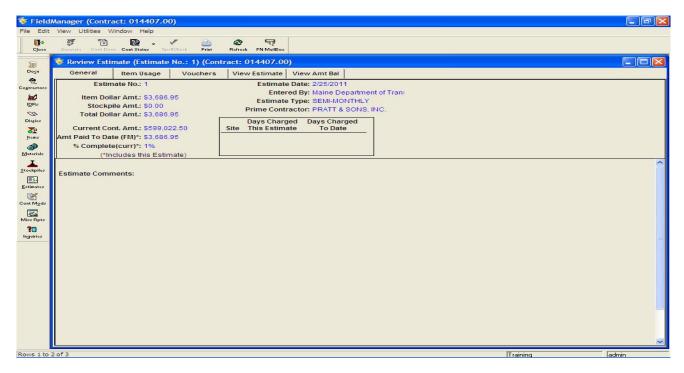


Figure 9-7

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).

| | anager (Co <u>View</u> Utilit | | 1200 | - | | | | | | | | | | - 8 |
|---------------|----------------------------------|---------------|------------|--------------------|---------------|---------|-------------|---------------|--------------------|------------|-------------------------------------------------------------|----------|-------|---------|
| Cjose | P Add | ER} Change | So Delete | <u>P</u> Review | 🐬 Generate | Approve | Cont Status | • V Filter | ↓ 2 Sort | Print | 2 Refresh | _ | | |
| | Contra | | | Contrac | t: 00001-0 | 00001) | | | | | | | | |
| lo <u>c</u> u | Find Cont. | | | | | | | | | Fit | ter: <sho< td=""><td>iw All≻</td><td>-</td><td></td></sho<> | iw All≻ | - | |
| Ra Ra | Cont. Mod Number | Rev. | Cont. M | | Status | | | Sho | rt Descrij | otion | | | Amoun | at . |
| | | 2 | 03/11/20 | | vraft | | | ns, need to | | | | | | 2,300.0 |
| ries | | 1 : | 3 03/11/20 | 004 A | pproved | Addir | ng two nev | w items to t | he contra | ct to supp | port the ch | iange in | \$8 | 6,417.8 |
| | | | | | | | | | | | | | | |
| ms | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| erials | | | | | | | | | | | | | | |
| E. | | | | | | | | | | | | | | |
| kpiles | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | |
| nates | | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | |
| Moda | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Rpts | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| iries | | | | | | | | | | | | | | |
| iries | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | 4 | | | | | | | | | | | | | |
| | laine and a second | _ | | | | | | | | | | | | |

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).

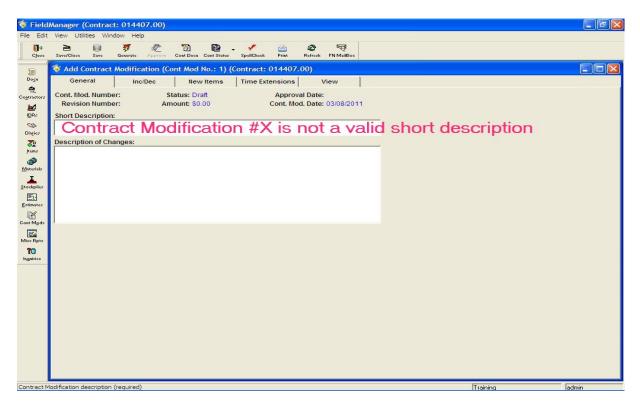


Figure 10-2. Add Contract Modification Window

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).

|]].+ Cjose | Save/Close | B Save | 🐬 Generate | Approve |) Item Doc | Cont Status | ✓ ✓ SpellCheck | Print | 2 Refresh | | | |
|----------------------|--------------|------------------|---------------|---------|---------------|-------------|-------------------|----------|--------------|------|--|---|
| | 10 Mar 1 / 1 | | | | 1 | | act: 00001 | | | | | _ |
| gu | Gene | eral | Inc | :/Dec | Nev | v Items | Time Ex | tensions | 1 | liew | | |
|] 10 | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| es | | | | | | | | | | | | |
| 0 | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| als | | | | | | | | | | | | |
| iles | | | | | | | | | | | | |
| ites | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| loda | | | | | | | | | | | | |
| ipts | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| ies | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

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 🛛 |
|--------------------------------------|--------------------------------------------------|--------------------------------|-------------------|-----------------|------------------------------|------------------------|-----------|---------------|---------------------------|-----------------|---------------------|----------|--------------------------------|--------|
| File Edit | View Utilities \ | Vindow Help | 0 | | | | | | | | | | | |
| Cļose | Save/Close Save | 🐉 Generate | Approve | لک اtem Doc | Cont Status | V SpellCheck | Print | Refresh | FN MailBox | | | | | |
| Dogu | 뜧 Add Contra | | ation (Co /Dec | 1 | | | | 1 | | 1 | | | | |
| 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 | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | Qty Change (+/- | 11 | | Baland | ce Qty | Dol | lar Value | e: \$0.00 | | | - | | | |
| | 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 | | | |
| Mate | | | | | | | |
| | | | | | | | |
| 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 | | |
| 10 | | | | | | | | | | | |
| > ies | | | | | | | | | | | |
| 2 | | | | | | | | | | | |
|) | | | | | | | | | | | |
| ials | | | | | | | | | | | |
| viles | | | | | | | | | | | |
| | | | | | | | | | | | |
| • | | | | | | | | | | | |
| lods | | | | | | | | | | | |
| Rpts | | | | | | | | | | | |
| ies . | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

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.

| ₩ It | ems | | | X |
|------|-------------------|-----------------|--------------|-----|
| |)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 |
| Cļose | Save/Close Save | - Generate | Approve | Item Doc | Cont Status | SpellCheck | eint (| Refresh | FN MailBox | | | | |
| 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 | | | | |
| 👮 Contractors | Item: | | • | | | | | | | | | | |
| - DR# | Supplemental Description: | | | | | | | - | | | | | |
| Ø | Item Type: | | | • | | | | | | | | | |
| Diagies | Unit Price: | | | Unit: | | | | | | | | | |
| ⊙ ∡ jtems | Reason: | | | | | | | | _ | | | | |
| Ð | | | | | | | | | | | | | |
| <u>Materials</u> | Section: | | | | | | | | | | | | |
| Stockpiles | Contractor: | PRATISS | UNS, INC. | | | | 1 8 | | - | | | | |
| | Project | Catg. | | | egory ription | | | Propose Quantity | | luantity Placed | | | |
| <u>E</u> stimates | 014407.00 | 0001 PRO. | JECT ITEM | S | | | | | | | | | |
| Cont Mods | 014408.00 | 0001 PRO. | | | | | | | | | | | |
| Ni v Dava | 014409.00 | 0001 PRO. | JECT ITEM | S | | | | | | | | | |
| 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 | | |
| ļtems | | |
| ø | | |
| <u>Materials</u> | | |
| Stockpiles | | |
| E. | | |
| <u>E</u> stimates | | |
| Cont Mods | | |
| 2 | | |
| Misc Rpts | | |
| ? O Inguiries | | |
| 1 | | |
| | | |
| | | |
| | | |
| | | |
| | 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) | | | |
| Gene | ral Ir | nc/Dec | New Items 1 | Time Extensions Vi | ew | | |
| | | | | | | | |
| | | | | | | | |
| | 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 | | | | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|----------------|-------------------------|---------------------------------------------------------|----------------------------------|--------------------------------------------------------------|----------|--------|--|
| it View Utiliti | ies Window H | elp | B . / | | 5 | | | | |
| 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.

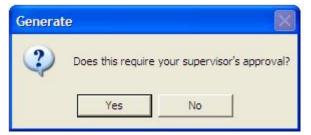


Figure 10-13a

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 | |
| N L T L 👜 🕸 🤜 | |
| Close View Filter Sort Print Refresh FN MailBox | |
| 🕤 🔯 Inquiries (Contract: 014407.00) | |
| Dogu Find Inquiry: | Filter: <show all=""></show> |
| A Contraction of the second se | |
| Contraction of the second se | |
| Breakdown Status | |
| 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 | |
| HOT MIX ASPHALT 9.5 MM | Т | 403.210 | 0090 | 0.000 | ~ |
| < | | | | 1041 | > |
| | And the second sec | and the second s | | Constants 1 | |
| FieldManager (Contract: 014407.00) | Filter | Sort | Cancel | Help | |
| FieldManager (Contract: 014407.00) Fle Edit View Utilities Window Help | Filter | Sort | Cancel | Help | |
| FieldManager (Contract: 014407.00) File Edit View Utilities Window Help Cost Print Refresh FN Mailbox File File File File File File File File | | Sort (| Cancel | Help | 5 PM |
| | Item His | tory to Date | | 3/02011 1/4 Field/lange | 5 PM |
| | Item His | tory to Date | Prop. Line 0010 AC | 382011 14 FieldManger Type Unit Price PRIGINAL ITEM 5,000.00000 | SPM |
| FieldManager (Contract: 014407.00) Fie Edit View Utilities Window Help Image: State of the state of t | Item His | tory to Date | Prop. Line Unit 0010 AC | 382211 14 Field/ange | SPM |
| | Item His ENTS | tory to Date | Prop. Line Unit 0010 AC | 382011 14 Pictotarage Type Unit Price PRIGINAL ITEM 5,000.00000 y Unpaid Item Complete | SPM |
| | Item His ENTS Category Category Description CT ITEMS | tory to Date | Prop. Line Unit 0010 AC id Quantiti ding Quantity | 382011 14 PictofArage Type Unit Price PRIGINAL ITEM 5,000.00000 y Unpaid Item Complete | 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 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.

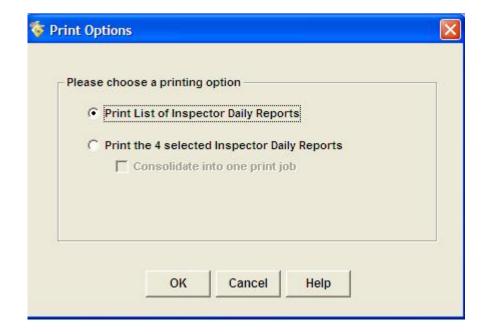
| Delete Review Cont S | | J <u>4</u> r Sort | Print Refro | | | | | |
|-----------------------------------------|--------|------------------------------|-------------|-----------|-----------|------------|---|--|
| Gitems (Contract: 00001-00001) | | | | | | | - | |
| Project: <all> Category: <</all> | 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.

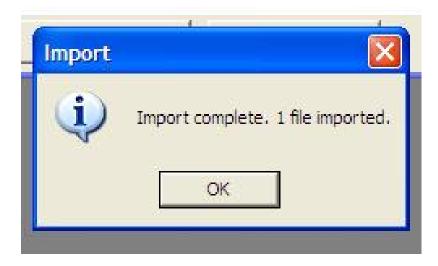
| 🔶 Maintain FieldBo | ook Datasources | |
|--------------------------------------------|--------------------------------------|-------|
| Default Datasource: Current Datasource: | | |
| Datasource | Database File Location | |
| fsdh | c:\fieldbk\database\fsdh\fieldbk2.db | |
| | | |
| Add | Delete Set 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. |
| be in good condi materials and co Contractors Contractor's Na MCGILLAN, INC. | ion. Pipe connec mpacted in 8 incl ame 6 00, TRAINING - | EASTON | Personn excavator o laborer truck driver | nd were today = el operator | within allowa 25.6m No. 1 1 1 1 1 BILITATION | Hrs. | Equipment dump truck Rack body truck small excavator | vith excavated No 1 1 | 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 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 | |
| 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: | ame 00, TRAINING - , HIGHWAY ITEI Tal Description T PIPE OPTION I MCGILLAN, INC. rks: 3 locations see | 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 No. 1 1 1 1 1 BILITATION n. Lo 3 locations | Hrs. | Equipment dump truck Rack body truck small excavator Quanti | vith excavated No 1 1 1 1 1 1 1 | 1 | |

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