



**MaineDOT**

**FieldManager** The logo for FieldManager, featuring the word 'FieldManager' in a large, bold, yellow font. To the right of the text are three yellow square icons: a folder, a smartphone, and a circular arrow.

**FieldNet** The logo for FieldNet, featuring the word 'FieldNet' in a large, bold, yellow font. To the right of the text are four yellow square icons arranged in a 2x2 grid: a folder, a smartphone, a magnifying glass, and a circular arrow.

# Users Guide

Release 4.8a

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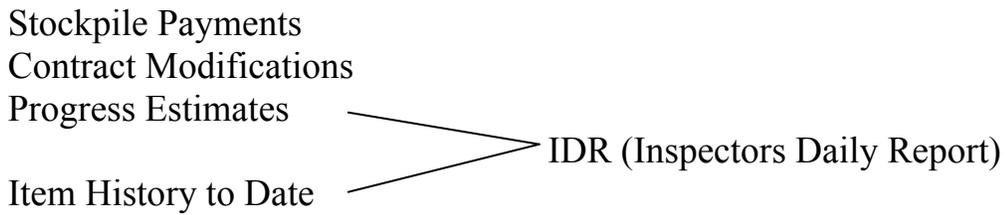
## **Examples of IDR documentation and referencing**



## 1. The FieldManager Support Directory

Guy Berthiaume            **592-6390**            624-3534  
guy.berthiaume@maine.gov

### Minimum required usage of FieldManager



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** – (figure 2-1)

Last Name	First Name	Middle Initial	User ID	Initials	Security Level
Administrator	System		admin	SA	System Administrator
Berthiaume	Guy	guy		GB	System Administrator
Doe	John	doe		JD	FieldManager User
Smith	Jane	smith		JS	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 – (figure 2-2)

The screenshot shows the 'FieldManager (Contract: \_014407.00A)' application window. The 'Add User' dialog box is open, featuring the following fields and controls:

- User ID:** A text input field.
- User Initials:** A text input field.
- User Name:** Three text input fields labeled (Last Name), (First Name), and (Middle Initial).
- Phone No.:** A text input field.
- Password:** A text input field with masked characters (\*\*\*\*\*).
- Re-enter Password:** A text input field with masked characters (\*\*\*\*\*).
- Security Level:** A dropdown menu.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom center.

The background shows a sidebar with various icons and a status bar at the bottom with 'Ready', 'Training', and 'Guy' indicators.

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** – Not 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

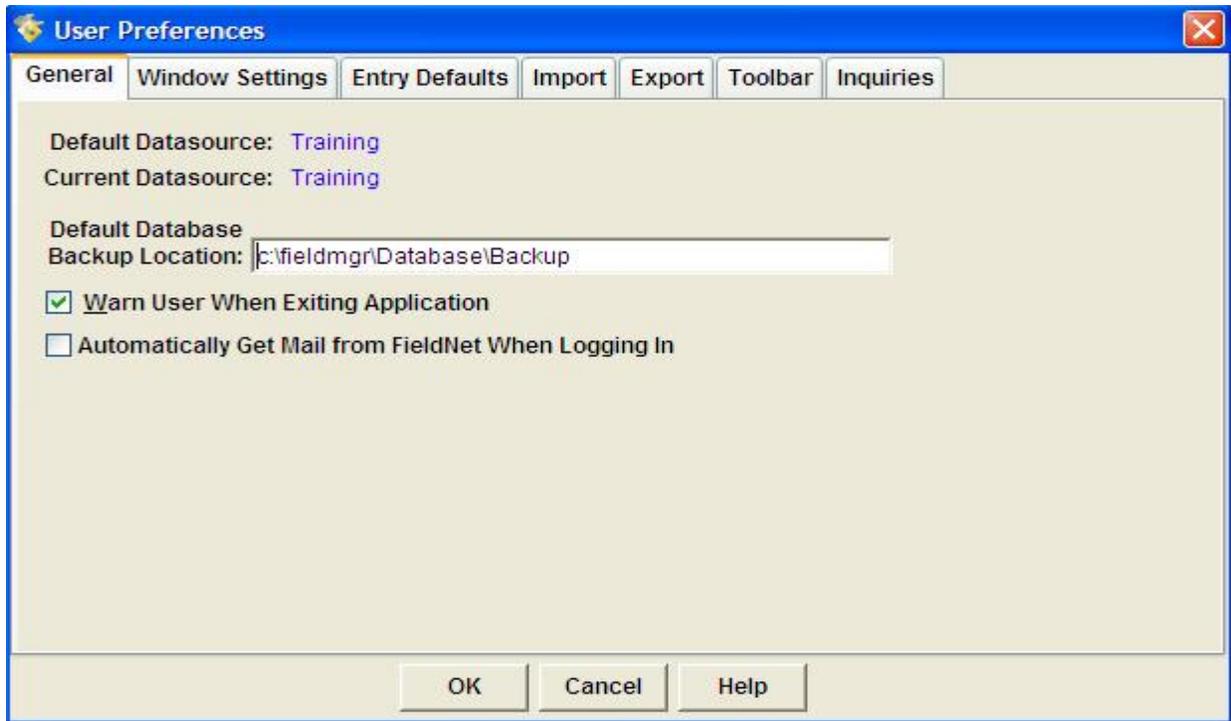
**Read Only:** Auditor or other being allowed to review information only

**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).



**Figure 2-3 General Tab**

**General Tab** – It is recommended that the *Automatically Get Mail from FieldNet When Logging In* check box not be checked unless the computer will always be connected to the secure MDOT intranet / FieldNet prior to logging into FieldManager.

Note: Change from previous versions of FieldManager - the **Default User ID** box is no longer located on this tab and has been moved to the logon window (figure 2-9).

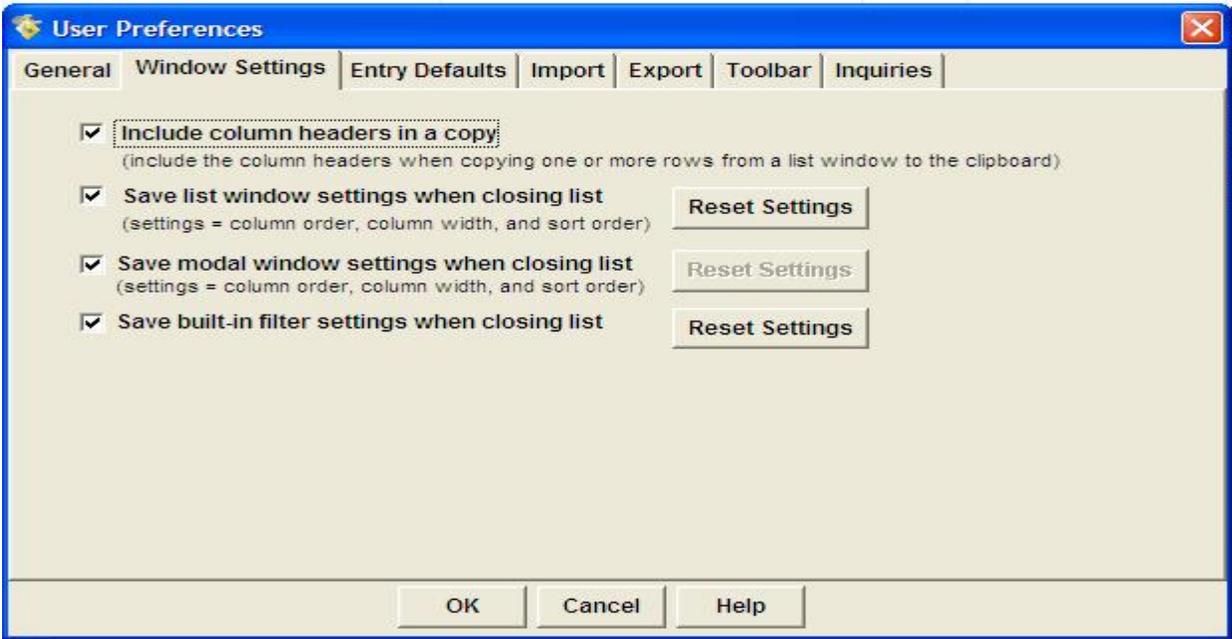


Figure 2-4 Window Settings Tab

**List Window Tab** – Gives the user options on how lists will be displayed when leaving and re-entering them.

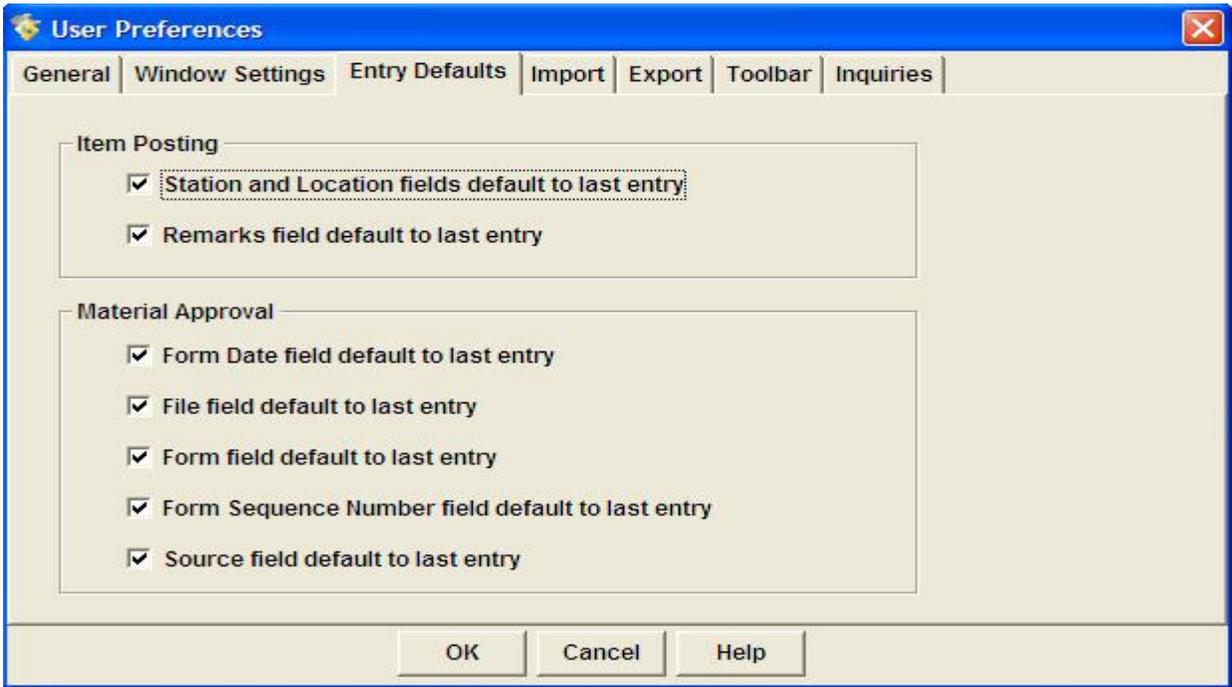
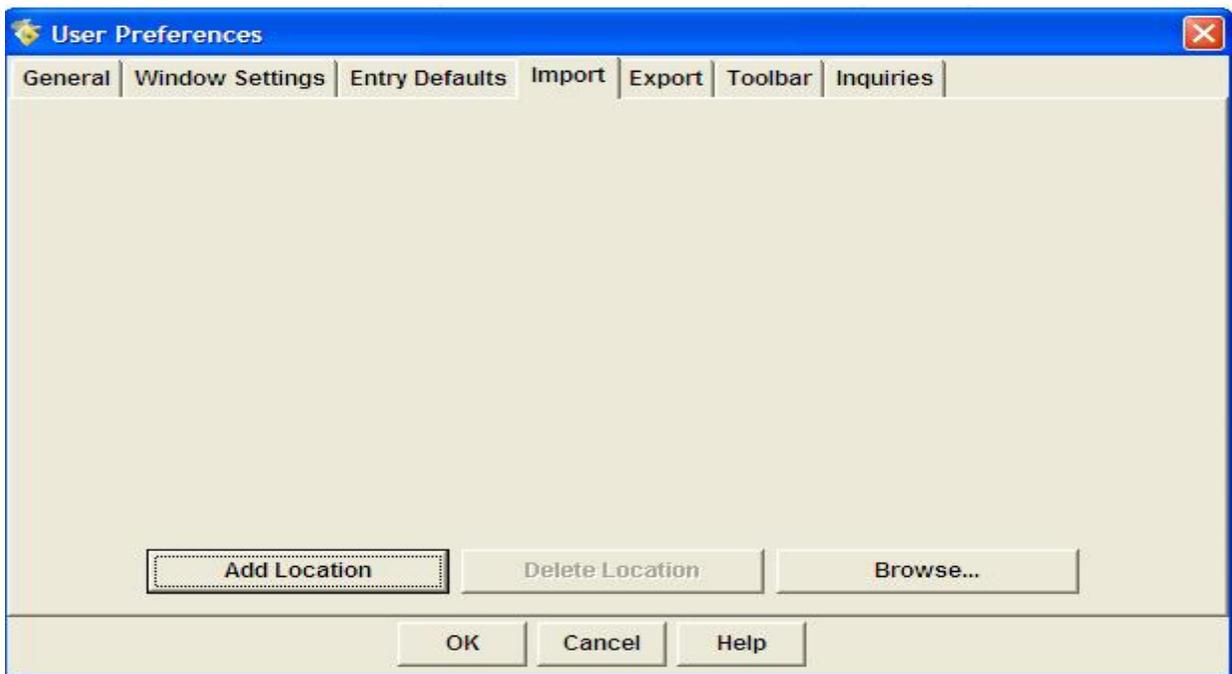


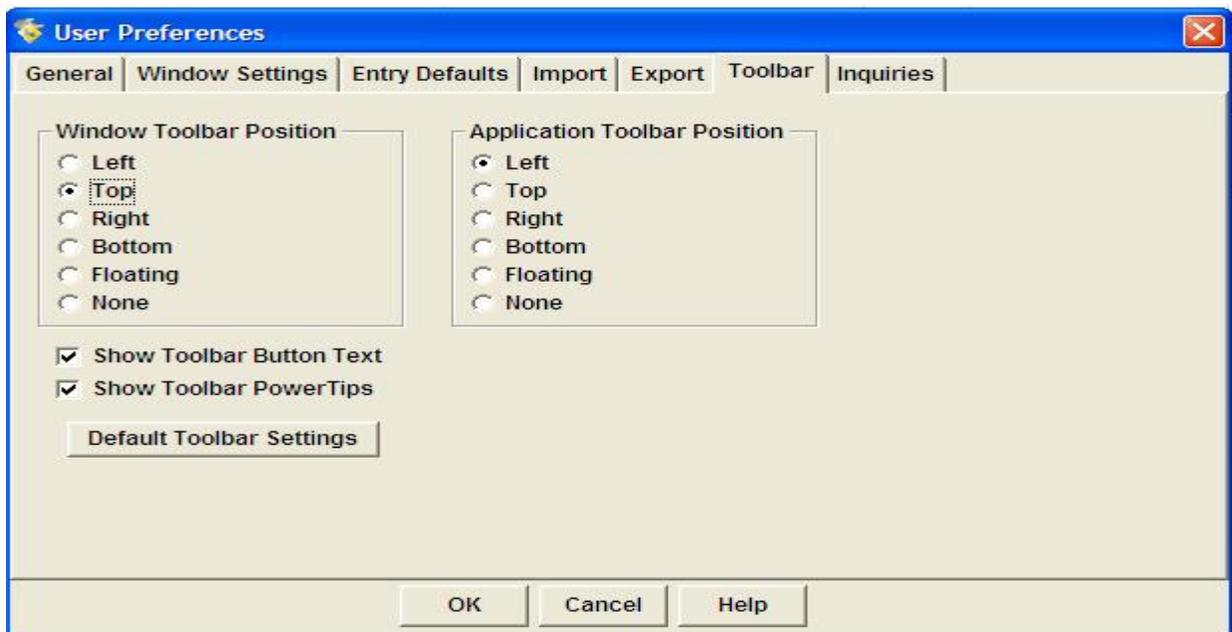
Figure 2-5 Entry Defaults Tab

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



**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.

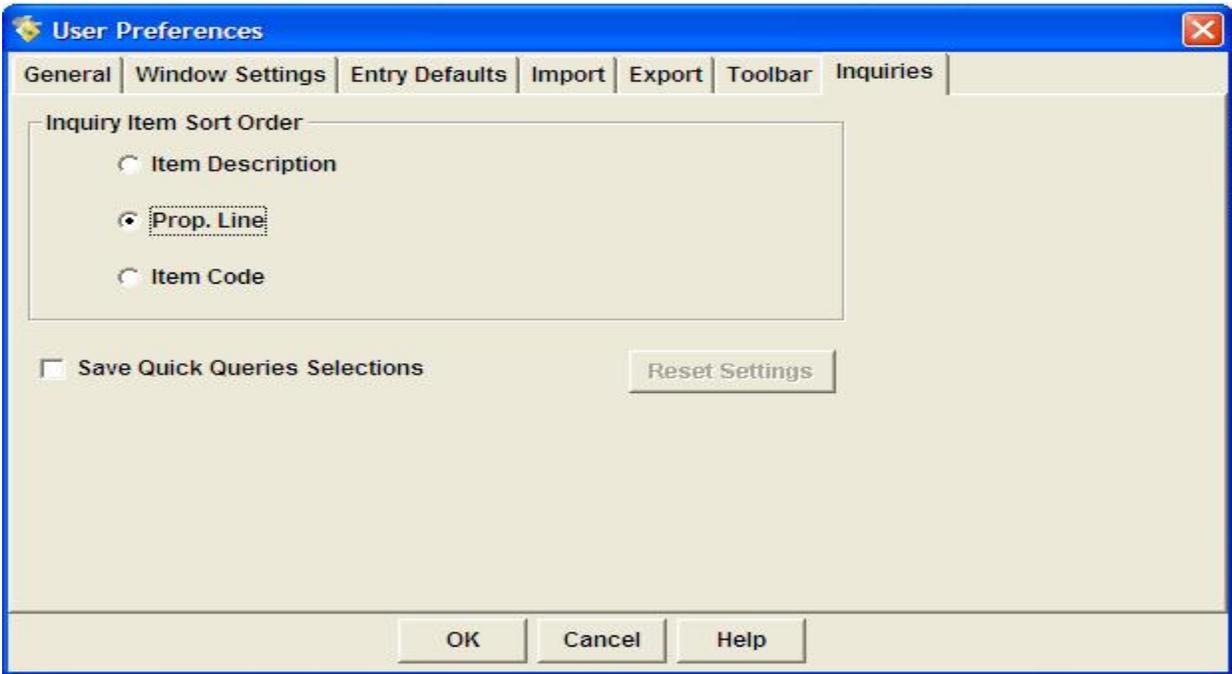


Figure 2-8 Inquiries Tab

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



Figure 2-9 FieldManager Login Window

Setting the **Default User ID** is now done during the login in process by clicking on the checkbox after typing in your new user name created earlier in this section. User that have more than one data source can also set or change the default during the login process.

### 3. General Information

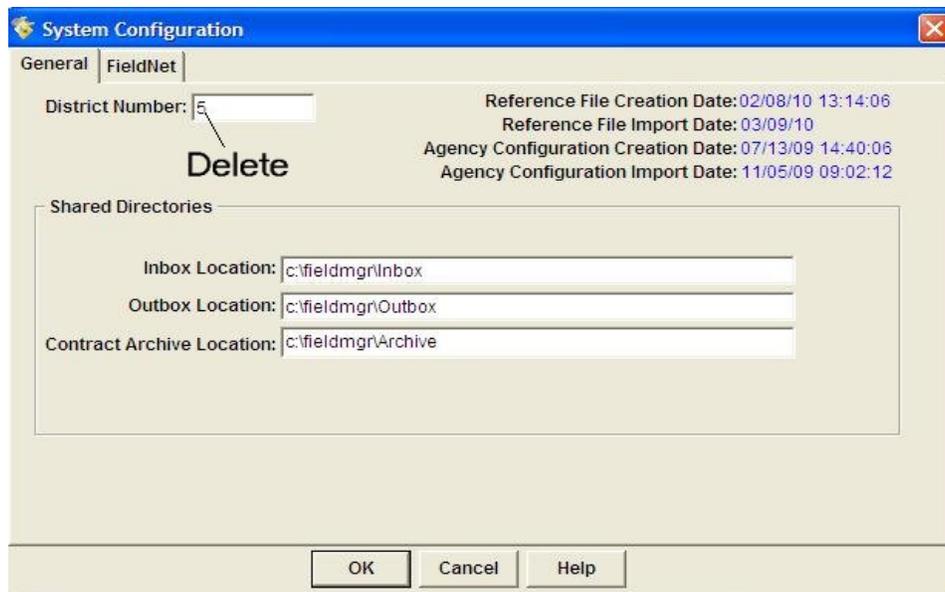
#### 3.1 District number error message

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



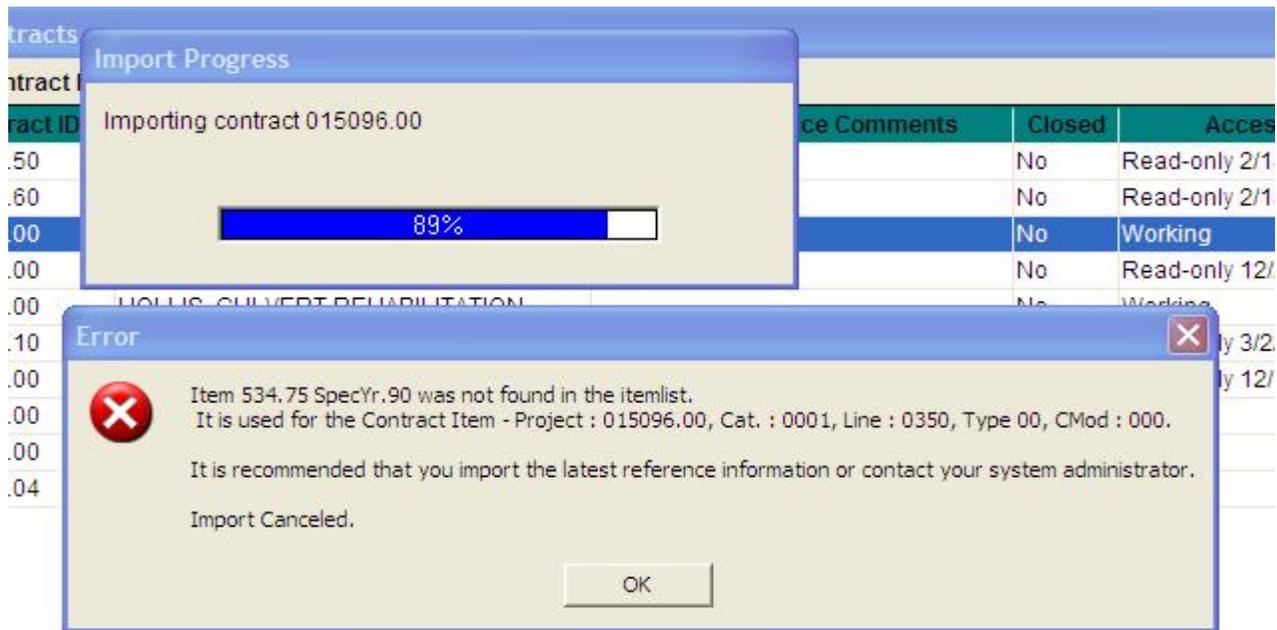
**Figure 3-1 – District Number Error**

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 (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.



**Figure 3-2 – System Configuration Window**

### 3.2 Reference Data Update Message



**Figure 3-3 - New reference data required message.**

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 FieldNet 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.

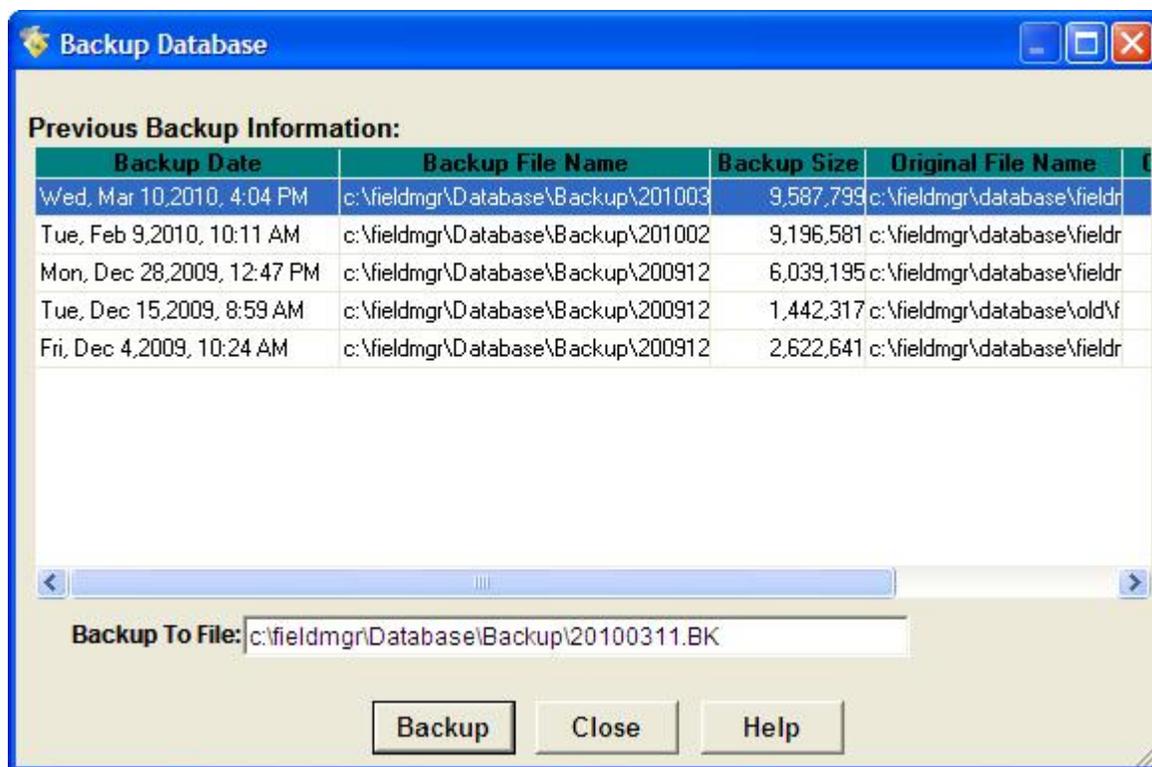
You can refresh the contract so that the most recent list of subcontractors will show up in your FieldManager contract. To do this - Navigate to the **Utilities** button at the top of your FieldManager

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 FieldNet 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 getting mail again in a few minutes).

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

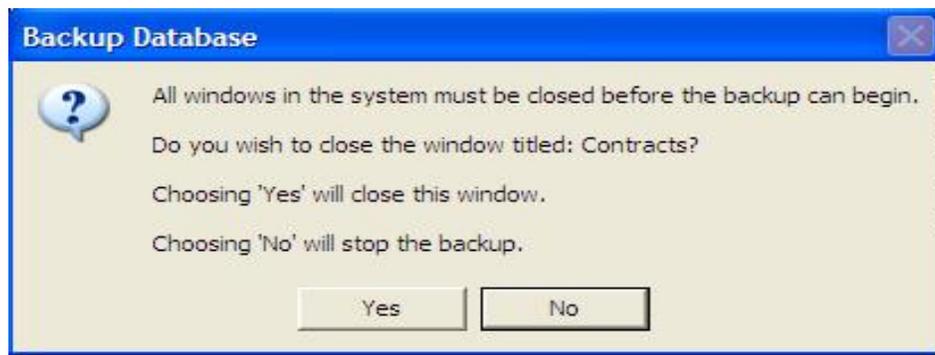
It is a good practice to backup your database on a regular basis to help guard against the loss of information in the case of a lost, stolen or crashed computer. A good routine to get into is backing up the database to an external network drive or flash drive after each estimate or contract modification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

This is done by going to **File** and then down to **Backup Database**. This will open a **Backup Database** window (figure 3-4) 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.



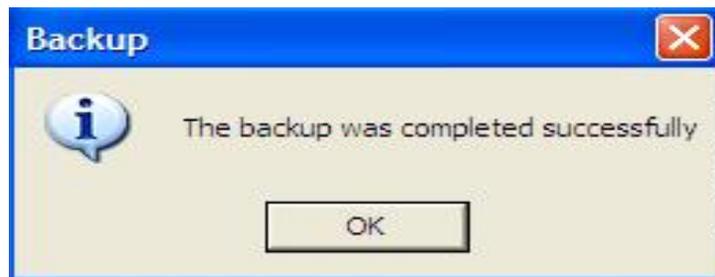
**Figure 3-4 – Backup Database.**

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 (figure 3-5) – if so click **Yes** so that the windows will be closed and the backup can begin.



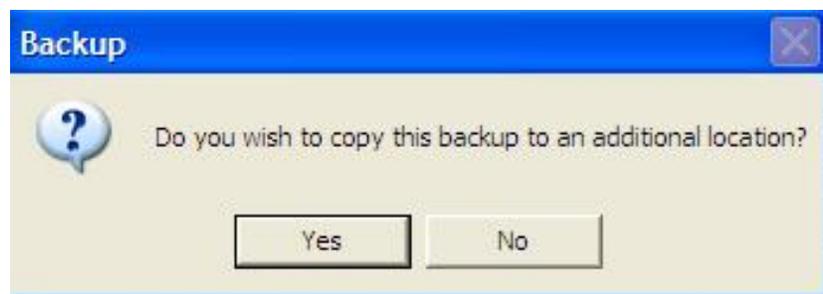
**Figure 3-5**

When the backup to your machine has completed you will receive the following message (figure 3-6).



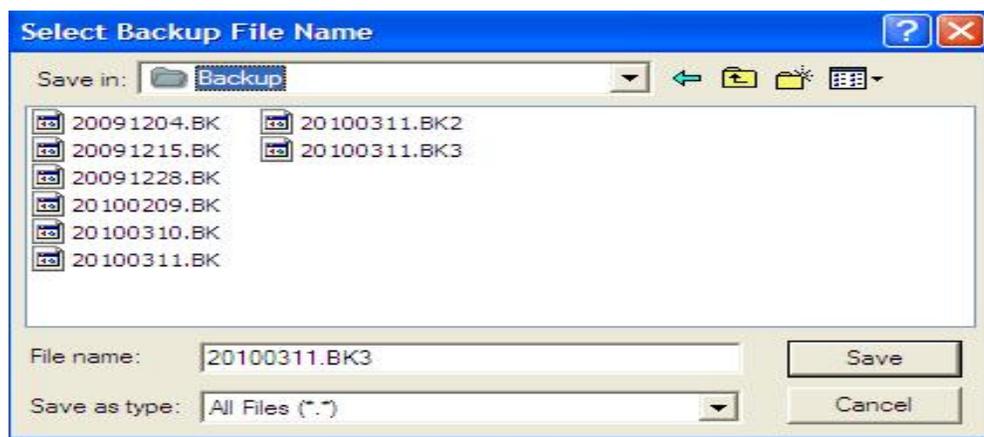
**Figure 3-6**

After clicking **OK** another message will appear asking if you would like to copy the backup to additional locations (figure 3-7).



**Figure 3-7**

After clicking **Yes** the following window will appear (figure 3-8).



**Figure 3-8**

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 (figure 3-9)

**Figure 3-9**

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

## 3.5 Contract Transfer

### 3.5a FieldNet User to FieldNet User

From within FieldManager go to **File** and down to **Export** then over to **Transfer Contracts** - you will see the following message (figure 3-10)

**Figure 3-10**

Click **Yes**. A list of the contracts on your machine will appear – contracts that you are able to transfer using FieldNet will appear black while those that are not FieldNet active or are **Read-Only** will be gray. Choose the desired and click **Select** – This will open up a window with multiple choices of action. By default the option to create a regular read-only copy is marked, change this to **Transfer the Contract** and click **OK** (figure 3-11).



Figure 3-11

A box containing FieldNet user ID's will be displayed (figure 3-12). From the list choose user desired and click **OK** (if the desired ID is not in the list see **Section 3.7 FieldNet ID List Update**).

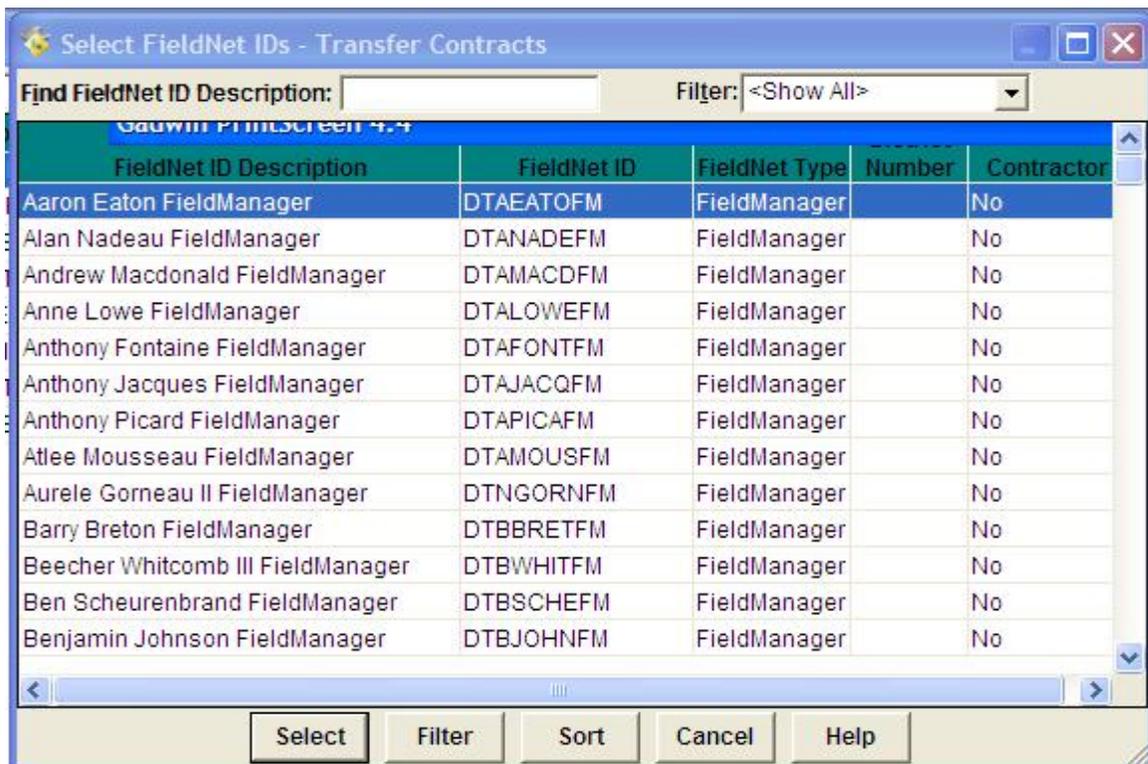


Figure 3-12

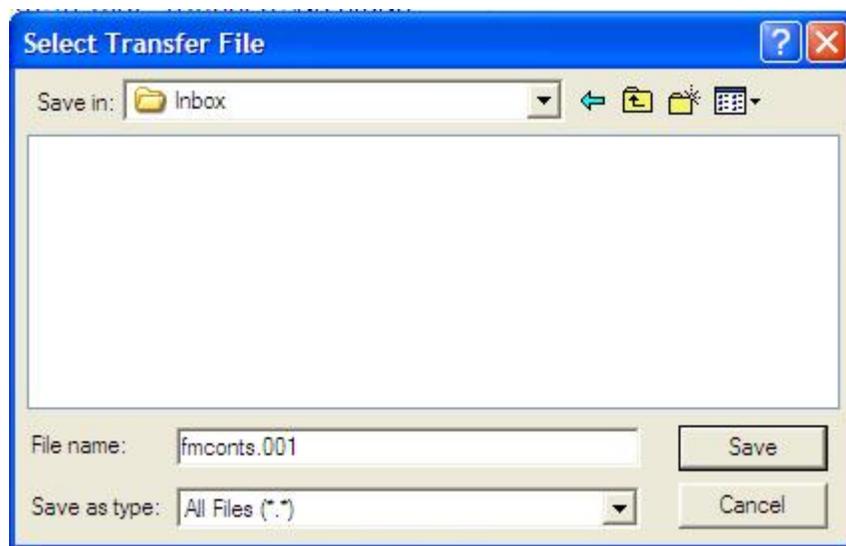
This will transfer the contract to your FieldNet Outbox and a message will be displayed saying “The contract(s) were successfully transferred”. Click **OK** then go to your FieldNet mailbox and send your **FN Outbox**

### 3.5b Non-FieldNet User to Non-FieldNet User

From within FieldManager go to **File** and down to **Export** then over to **Transfer Contracts** - you will see the following message (figure 3-10 – section 3.5a above).

Click **No**. A list of the contracts on your machine will appear – contracts that you are able to transfer will appear black while those that are **Read-Only** will be gray. Choose the desired and click **Select** – this will open up a window with multiple choices of action. By default the option to create a regular read-only copy is marked, change this to **Transfer the Contract** and click **OK** (figure 3-11 – section 3.5a above).

A Select Transfer File box will then be displayed (figure 3-13). Choose a location to save the transferred contract by clicking the **Save in** drop down at the top of the box and navigate to the desired location – make sure of your location choice so that the file can be retrieved later either by Windows Explorer or through your email attachment function. The file name for the transferred contract defaults to **fmconts.001** – it is recommended that the file name be change to match the contract WIN followed by .001 (01234500.001) prior to clicking **Save**.



**Figure 3-13**

If the file is not already in a location that can be accessed by the FieldManager user that will be importing the contract move the transferred contract file to a location that is by using windows explorer or email.

Importing the transferred contract is done by going to **File** then down to **Import** and over to **File**. In the **Select Import File** window that is displayed (figure 14) you will need to change the type of file being looked for by clicking the **Files of type** drop down and choosing **Contract Files** (figure 3-14a) then click on the **Look in** drop down to navigate to the file location of the transferred contract. Select the file and click **Open**. A progress status bar will be displayed while the contract is being imported – when the import has completed a message will be displayed stating as such (figure 3-15) – click **Ok**.

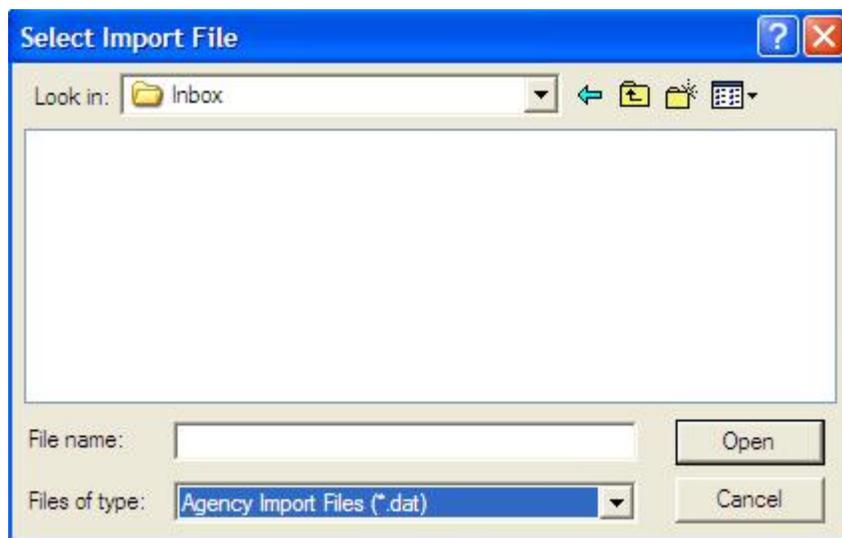


Figure 3-14

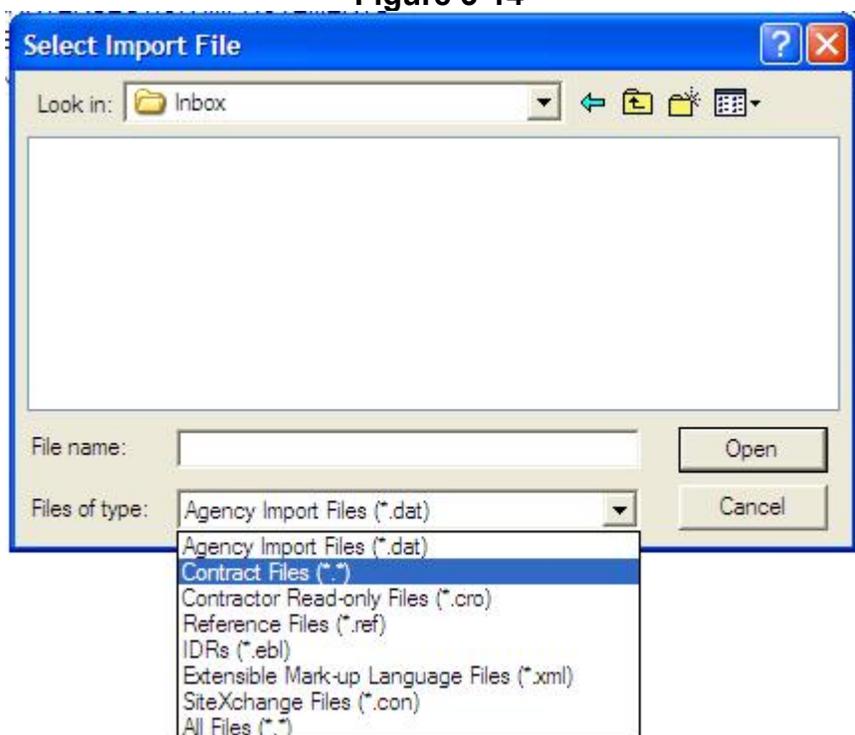


Figure 3-14a



Figure 3-15

### 3.5c Non-FieldNet User to FieldNet User

This process is the same as **Section 3.5b**.

a) If this will be a short term transfer and the contract will be going back to the Non-FieldNet user nothing more need be done

b) If this will be a long term transfer and the contract is going to stay with the FieldNet user you will need to contact the system administrator (Guy Berthiaume) so that the contract can be activated into the FieldNet system.

### 3.5d FieldNet User to Non-FieldNet User

This process is the same as **Section 3.5b** with the addition of a message that will be created during the export process and placed in the FieldNet Outbox. The FieldNet message when sent will change the status of the contract in the FieldNet system from Active to External.

## 3.6 Closed Contract Removal

In most cases the contract should have been transferred to someone within the Contracts Section during the closeout review process. If the contract was not transferred at that time the following process should be used to remove “Live” contracts from your FieldManager program – a **Read-Only** copy will automatically be created during the transfer process that may be kept for later reference or deleted at the users’ discretion.

### 3.6a FieldNet Active Contract

This process is the same as **Section 3.5a** – when choosing the from the FieldNet ID’s window (figure 3-12 from section 3.5a above) the **CLOSEDCONTRACTS – FieldNet ID, Closed FieldNet Contracts – FieldNet ID Description** is the choice to be made.

### 3.6b Non-FieldNet Active Contract

This process is the same as **Section 3.5b** with the contract file being emailed to someone working within the Contracts Section of MDOT.

## 3.7 FieldNet ID List Update

Go to **Utilities** then down to **FieldNet** and over to **Request FieldNet ID list from FieldNet**. The request message will be placed in your **FN Mailbox** in a not sent status. Go to your **FN Mailbox** and click **Send Outbox** – wait 5 - 10 minutes then click **Get Mail** from you **FN Mailbox** and **Process** the new message to update your FieldNet ID list.



## 4. Contract Load and Setup

Residents will need to email Rebecca Snowden and Guy Berthiaume to let them know so that the files can be 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 3-1 & 3-2) 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 (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.

Contract ID	Contract Description	Managing Office Comments	Closed	Access	Prime Contractor
009184.50	GILEAD, HIGHWAY RECONSTRUCTION	Highway Program	No	Read-only 2/18/2010	K & K EXCAVATION, INC.
009184.60	GILEAD, HIGHWAY RECONSTRUCTION	Highway Program	No	Read-only 2/18/2010	K & K EXCAVATION, INC.
011090.00	HARPSWELL, BRIDGE REHABILITATION		No	Working	CPM CONSTRUCTORS
012658.00	LIMINGTON, BRIDGE REPLACEMENT		No	Read-only 12/22/2009	N F LUCE, INC.
012694.00	HOLLIS, CULVERT REHABILITATION		No	Working	KNOWLES INDUSTRIAL SERVICES CORP
013022.10	STATEWIDE, TRUSSES AND SIGNS		No	Read-only 3/2/2010	LIDDELL BROTHERS, INC.
014806.00	PORTLAND, HIGHWAY RESURFACING		No	Read-only 12/17/2009	PIKE INDUSTRIES, INC.
015638.00	BEAVER COVE, BRIDGE REPLACEMENT		No	Working	N F LUCE, INC.
015846.00	FARMINGTON-STRONG, HIGHWAY RESURF		No	Working	SEALCOATING, INC.
015961.04	REGION 4, CRACK SEALING		No	Working	NICOM COATINGS CORP.

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 (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.

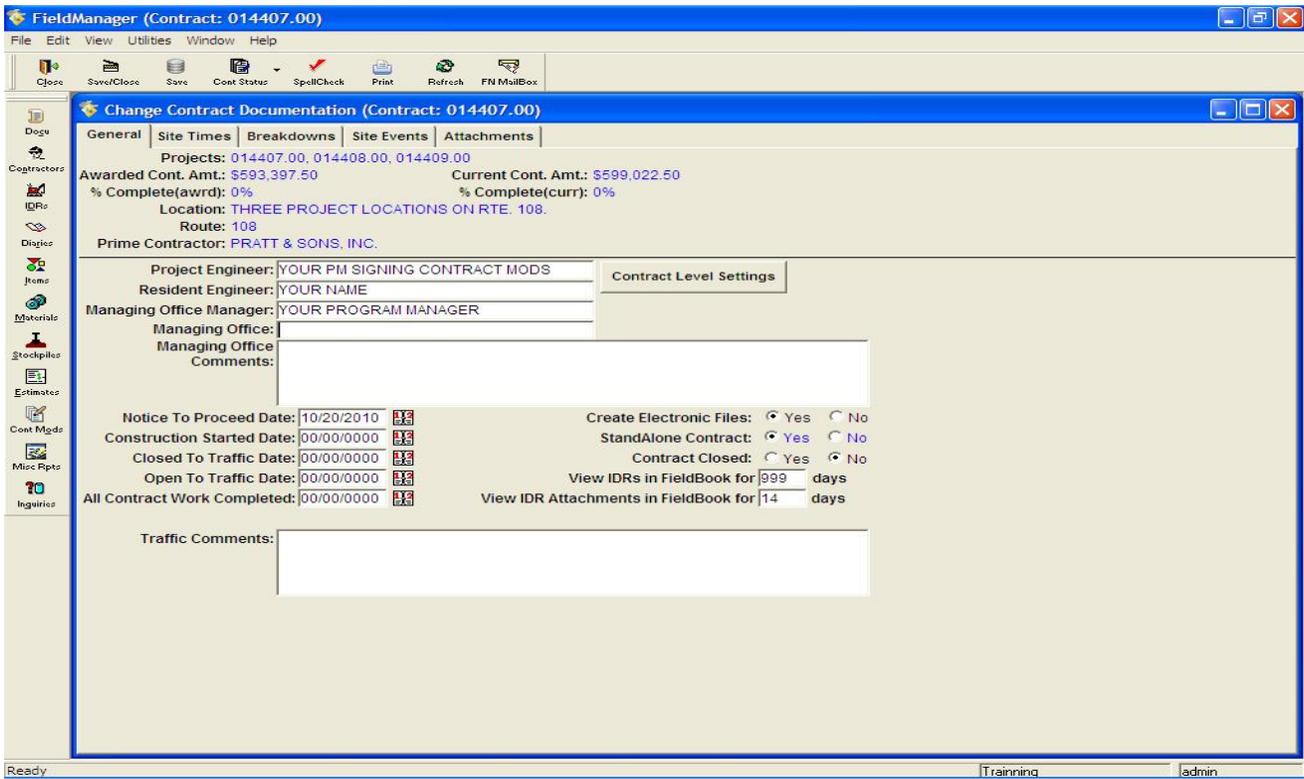


Figure 4-2 - Change Contract Documentation Window

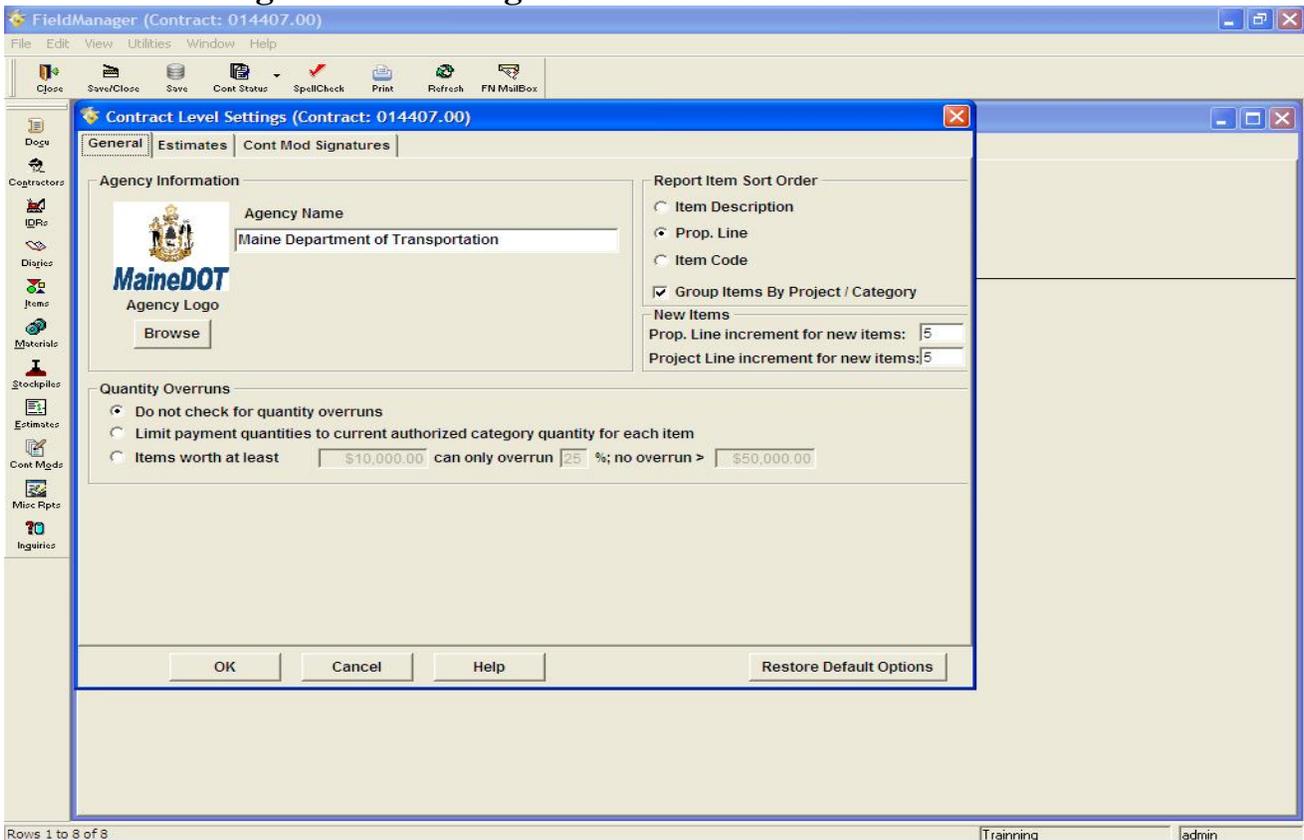


Figure 4-3 - Contract Level Settings Window

## 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 (figure 4-4) is used to automatically send a read-only copy of the contract to a designated user(s) when an estimate is submitted. FieldNet ID's can be entered into the Regular Read-Only List (right window) by clicking the Add Recipient button and choosing from the list. At this time the Contractor Read-Only section (left window) is not used.

**Figure 4-4 – RO Distribution**

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 (figure 5-1).

Item Description	Units	Item Code	Prop. Line	Quantity Placed	Quantity Paid	Authorized Quantity	Initial Quantity	Pending Changes	Unit Price
CLEARING	AC	201.11	0010	0.000	1.340	1.400	1.400	0.000	\$5,000.000
REMOVING SINGLE TREE TOP ONLY	EA	201.23	0020	0.000	6.000	6.000	6.000	0.000	\$250.000
REMOVING STUMP	EA	201.24	0030	0.000	2.000	6.000	6.000	0.000	\$180.000
COMMON EXCAVATION	CY	203.20	0040	0.000	4,532.000	8,805.000	8,805.000	0.000	\$8.400
ROCK EXCAVATION	CY	203.21	0050	0.000	2,172.030	2,940.000	2,940.000	0.000	\$41.000
AGGR SUBB COURSE - GRAVEL	CY	304.10	0060	0.000	2,212.000	3,385.000	3,385.000	0.000	\$20.000
HOT MIX ASPHALT 19.0 MM HMA	T	403.207	0070	0.000	0.000	950.000	950.000	0.000	\$83.260
HOT MIX ASPHALT 9.5 MM (INCIDENTALS)	T	403.209	0080	0.000	0.000	115.000	115.000	0.000	\$110.000
HOT MIX ASPHALT 9.5 MM	T	403.210	0090	0.000	0.000	480.000	480.000	0.000	\$84.000
HOT MIX ASPHALT 12.5 MM BASE	T	403.213	0100	0.000	0.000	490.000	490.000	0.000	\$84.000
BITUMINOUS TACK COAT - APPLIED	G	409.15	0110	0.000	0.000	315.000	315.000	0.000	\$9.500
UNTREAT AGGR SURF CRS, TR MEAS	CY	411.10	0120	0.000	0.000	15.000	15.000	0.000	\$47.000
STR CONC ROADWAY MEDIAN	CY	502.341	0130	0.000	0.000	29.000	29.000	0.000	\$460.000
15" CULV PIPE OPTION I	LF	603.16	0140	0.000	162.000	180.000	180.000	0.000	\$25.000
18" CULV PIPE OPTION III	LF	603.179	0150	0.000	0.000	90.000	90.000	0.000	\$32.000
ADJUST MANHOLE OR CB TO GRADE	EA	604.18	0160	0.000	0.000	1.000	1.000	0.000	\$675.000
15" UNDERDRAIN TYPE C	LF	605.12	0170	0.000	0.000	150.000	150.000	0.000	\$44.000
UNDERDRAIN DELINEATOR POST	EA	606.356	0180	0.000	0.000	3.000	3.000	0.000	\$47.000
SINGLE WOOD POST	EA	606.47	0190	0.000	0.000	5.000	5.000	0.000	\$47.000
CURB TYPE 3	LF	609.31	0200	0.000	0.000	120.000	120.000	0.000	\$10.000
PLAIN RIPRAP	CY	610.08	0210	0.000	3.430	395.000	395.000	0.000	\$27.000
EROSION CONTROL BLANKET	SY	613.319	0220	0.000	378.100	500.000	500.000	0.000	\$1.300
LOAM	CY	615.07	0230	0.000	0.000	75.000	75.000	0.000	\$50.000
SEEDING METHOD NUMBER 1	UN	618.13	0240	0.000	0.000	35.000	35.000	0.000	\$15.700
MULCH	UN	619.12	0250	0.000	0.000	35.000	35.000	0.000	\$14.700

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.

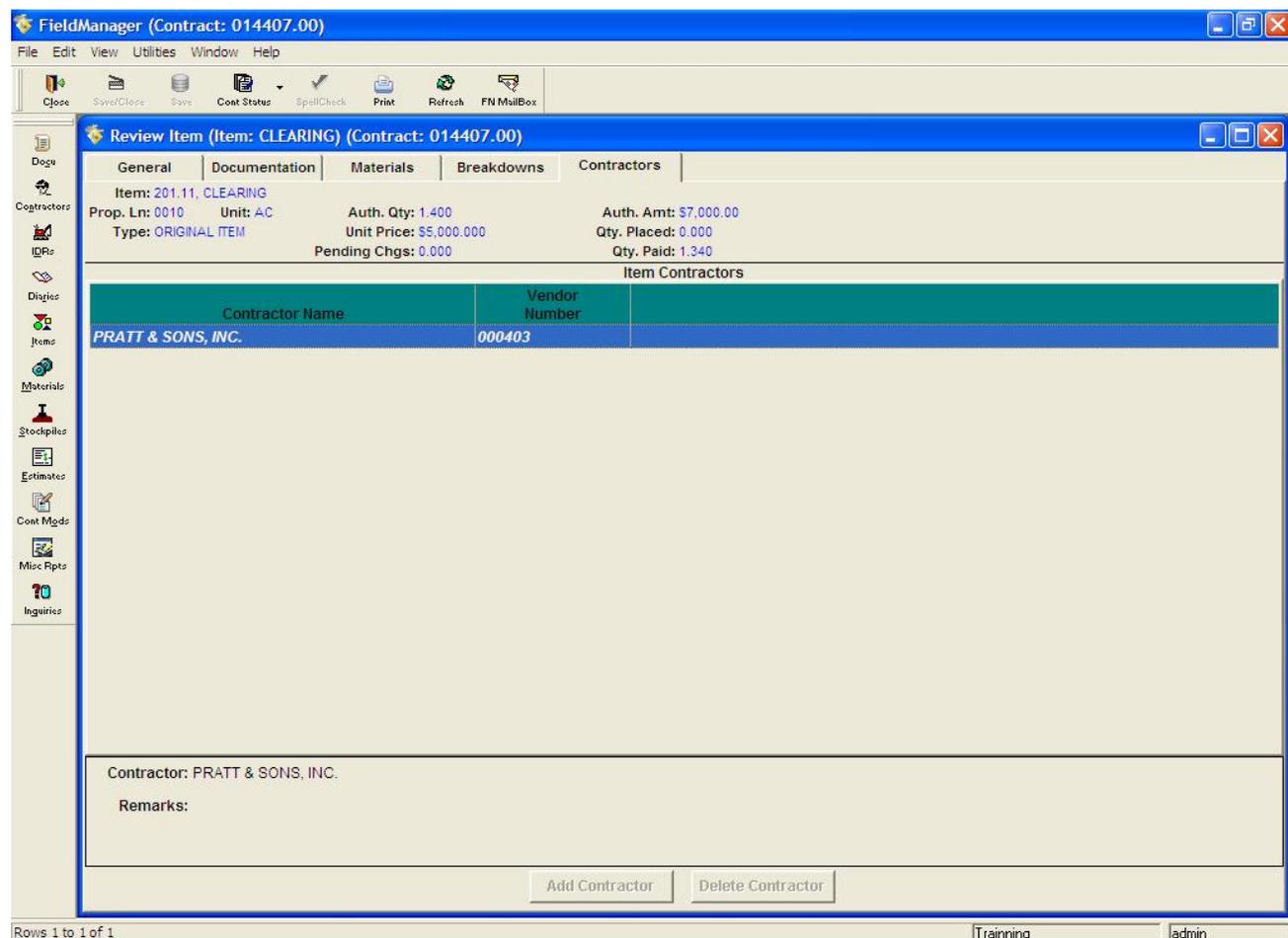
Items can also be sorted in a variety of different formats, this is performed by selecting the **Sort** icon and then selecting from the options, the format you would like the items to be viewed.

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.

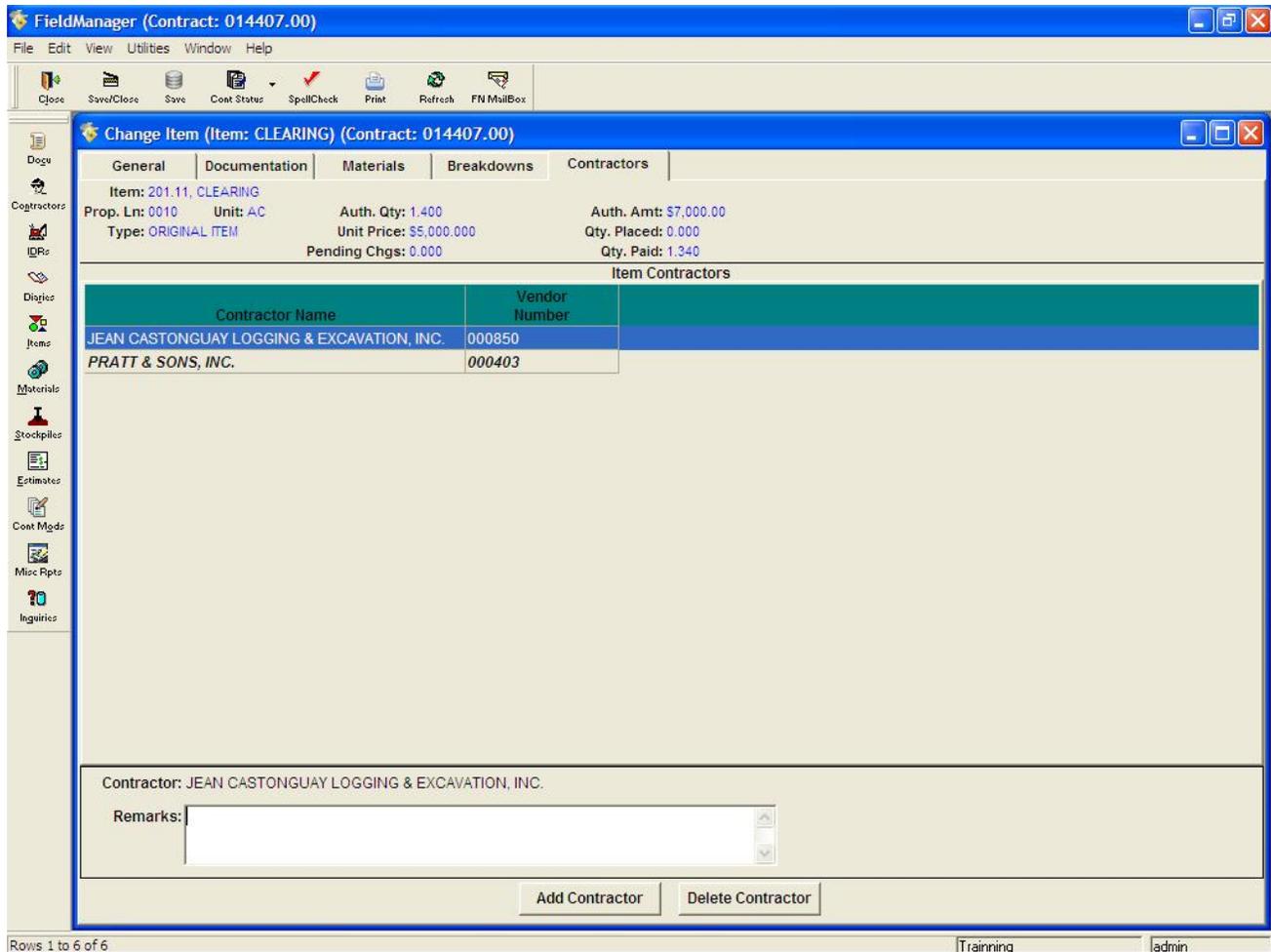
## 5.2 Changing and Adding Contractors Associated with an Existing Item

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 (figure 5-2).



**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.

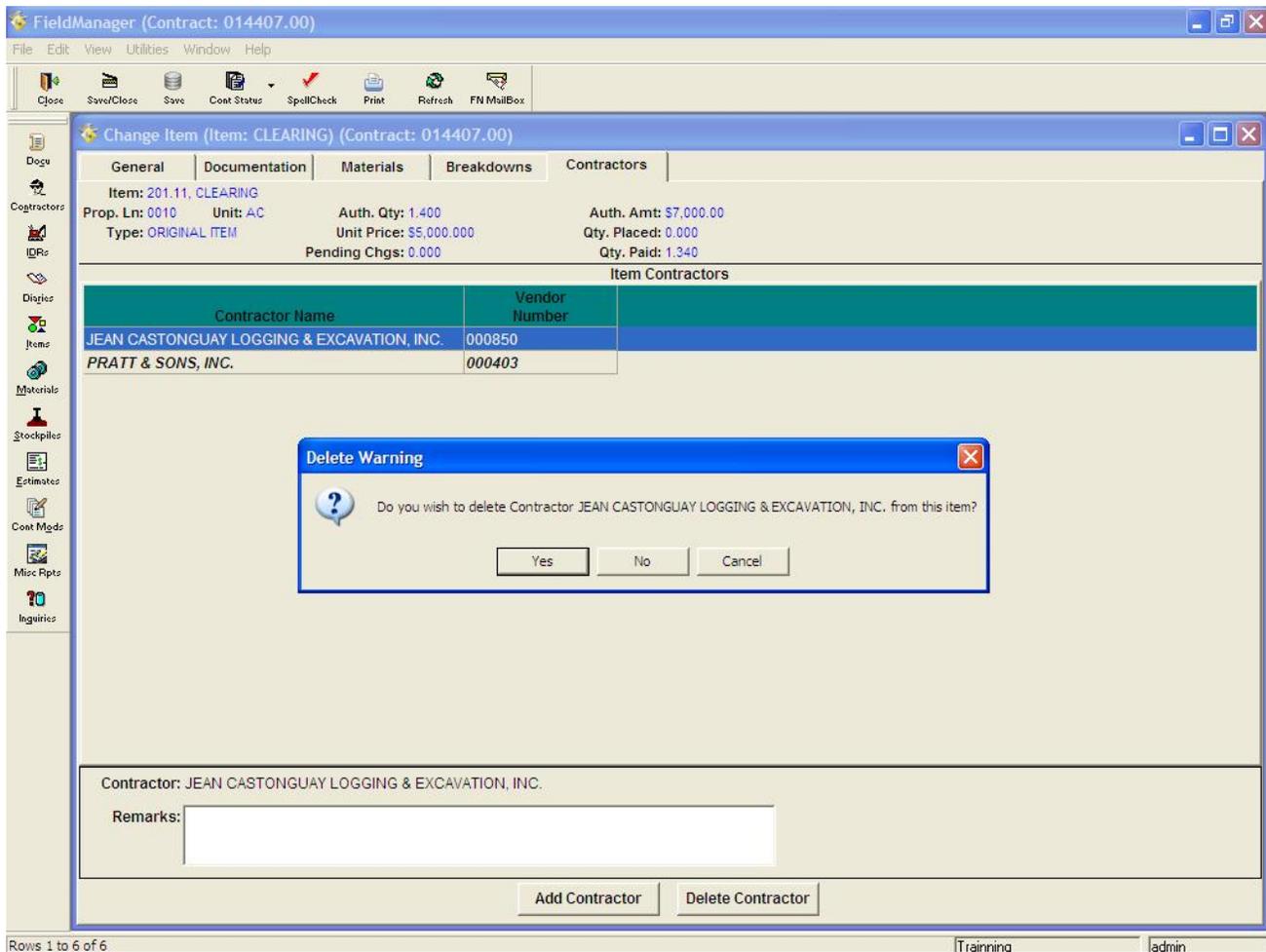


**Figure 5-3 - Change Item Window – Multiple Contractors Associated**

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 (figure 5-4).



**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** (figure 6-1).

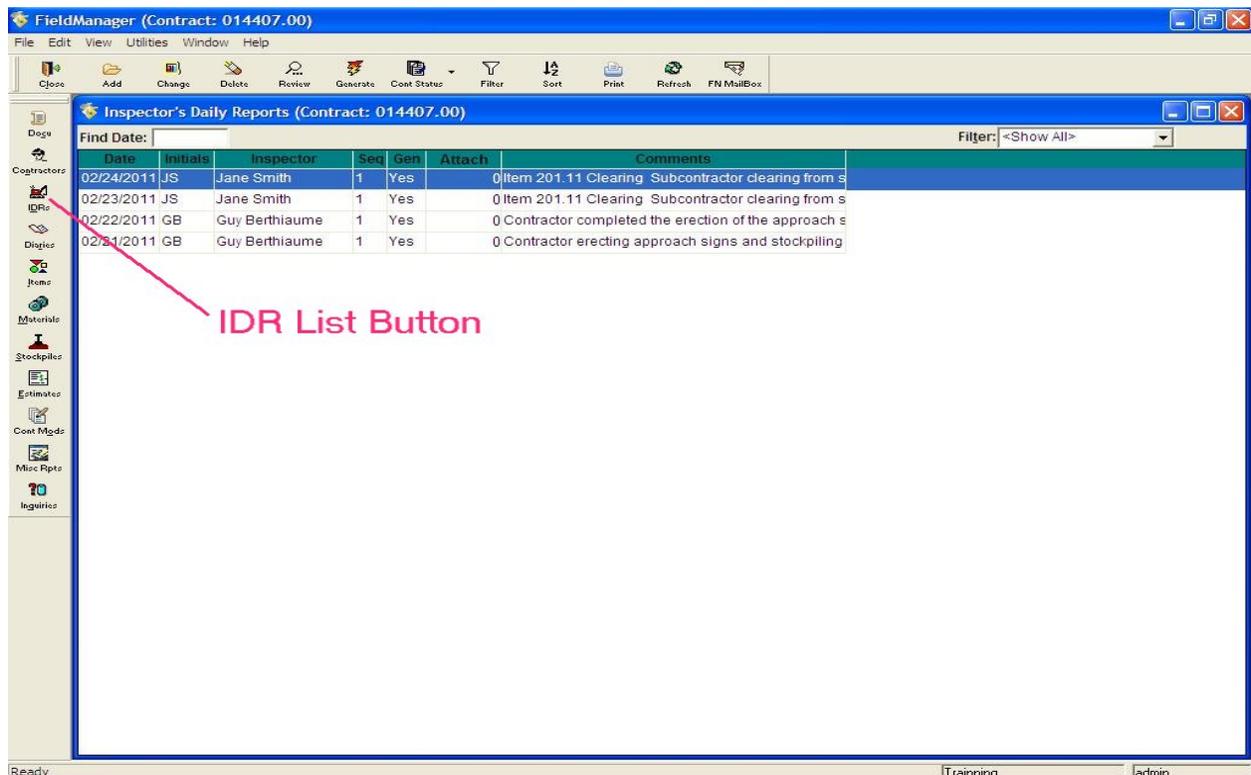


Figure 6-1 - Inspectors Daily Reports List Window

### 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 (figure 6-2).

**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**.

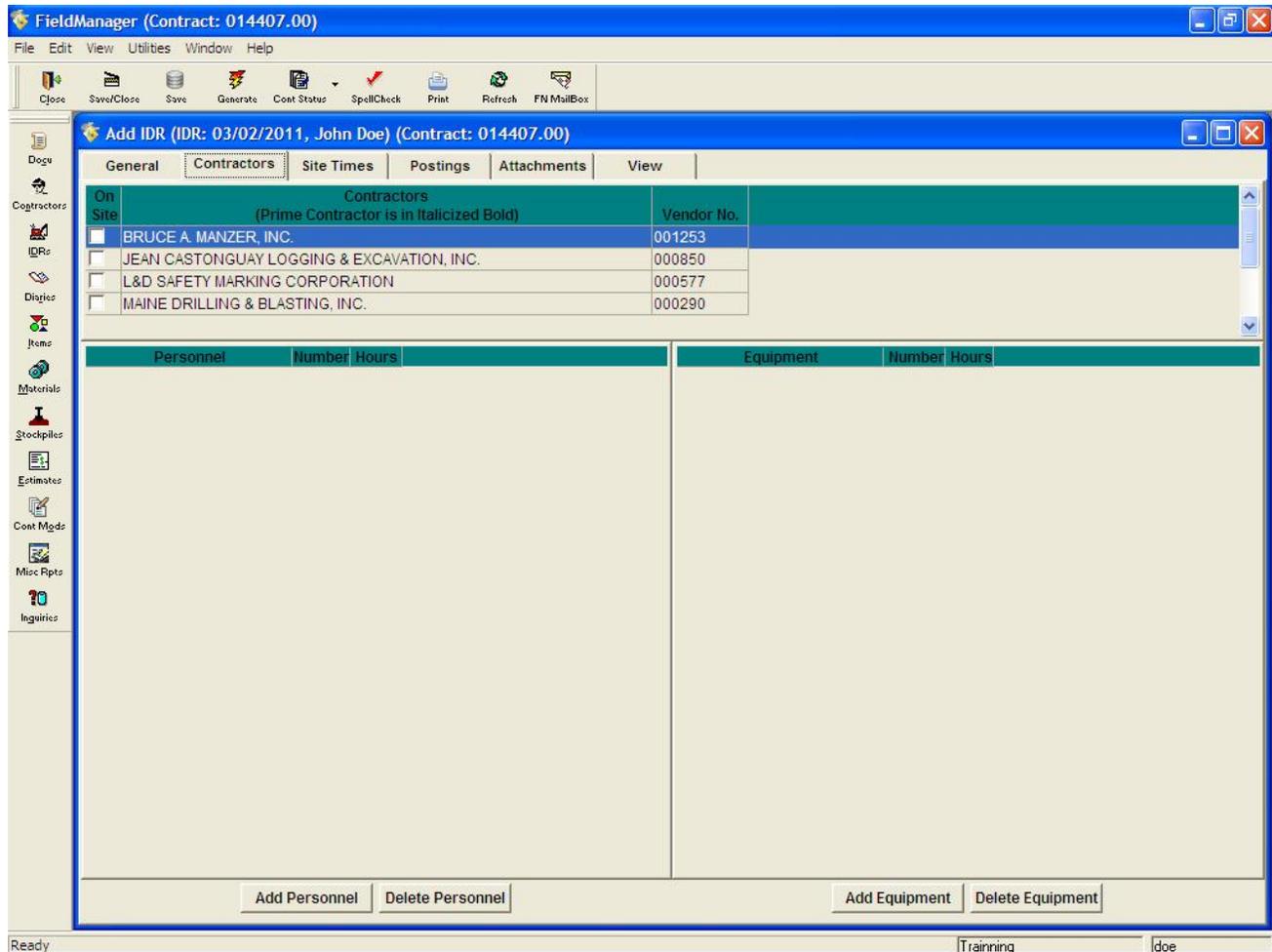
As information becomes available, FieldManager software automatically enters information in the following fields at the top of the tab window; Date/Time Entered, Entered By, Sequence Number, Generated, Revised By, Revision Date and Revision Number,

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.

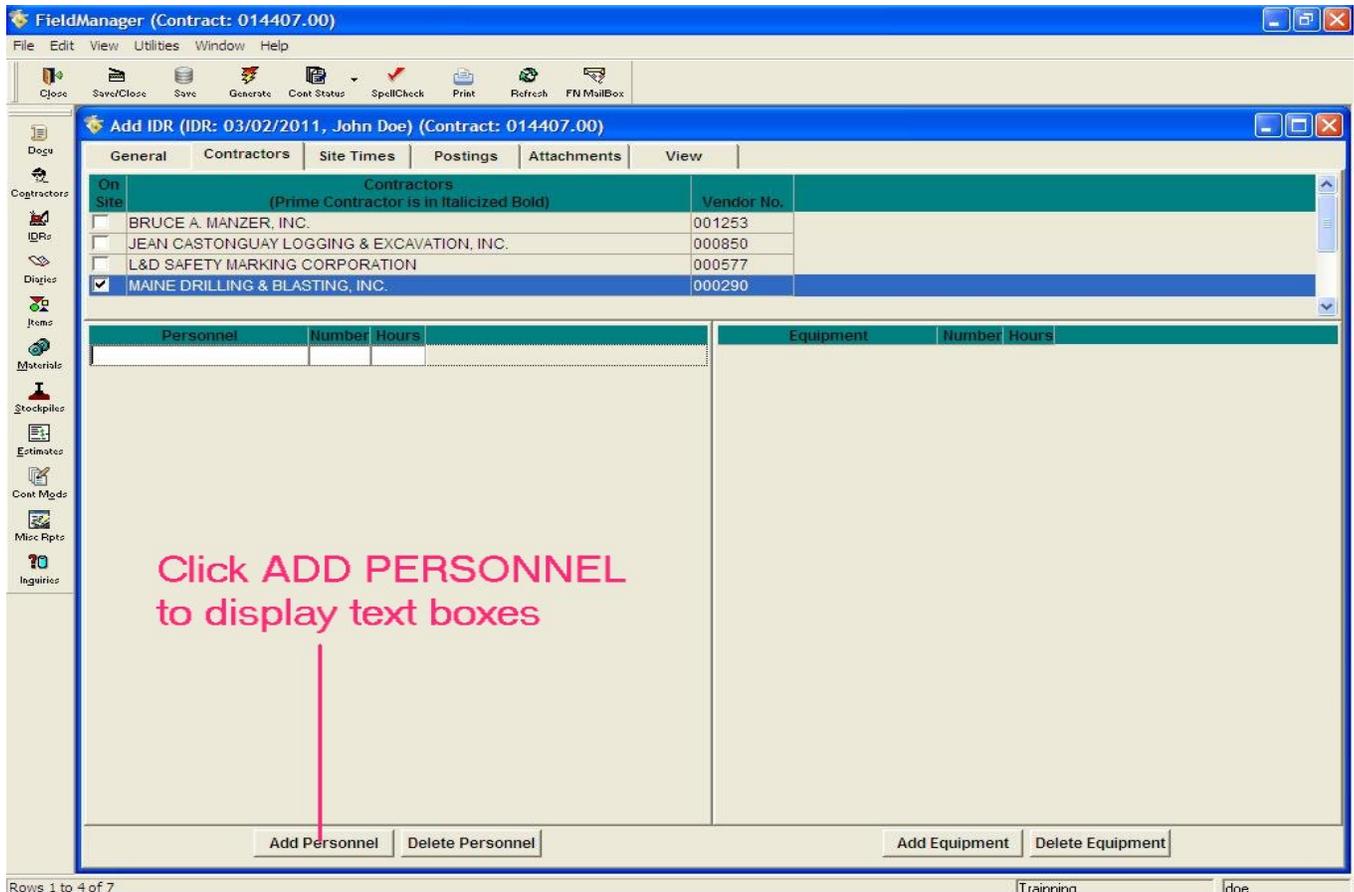
To add contractor personnel to a new IDR, select the appropriate contract in the **Contracts List Window**, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Click **Add** on the **Window Toolbar** to open the **Add IDR** tab window, and then click the **Contractors**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



**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.



**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.

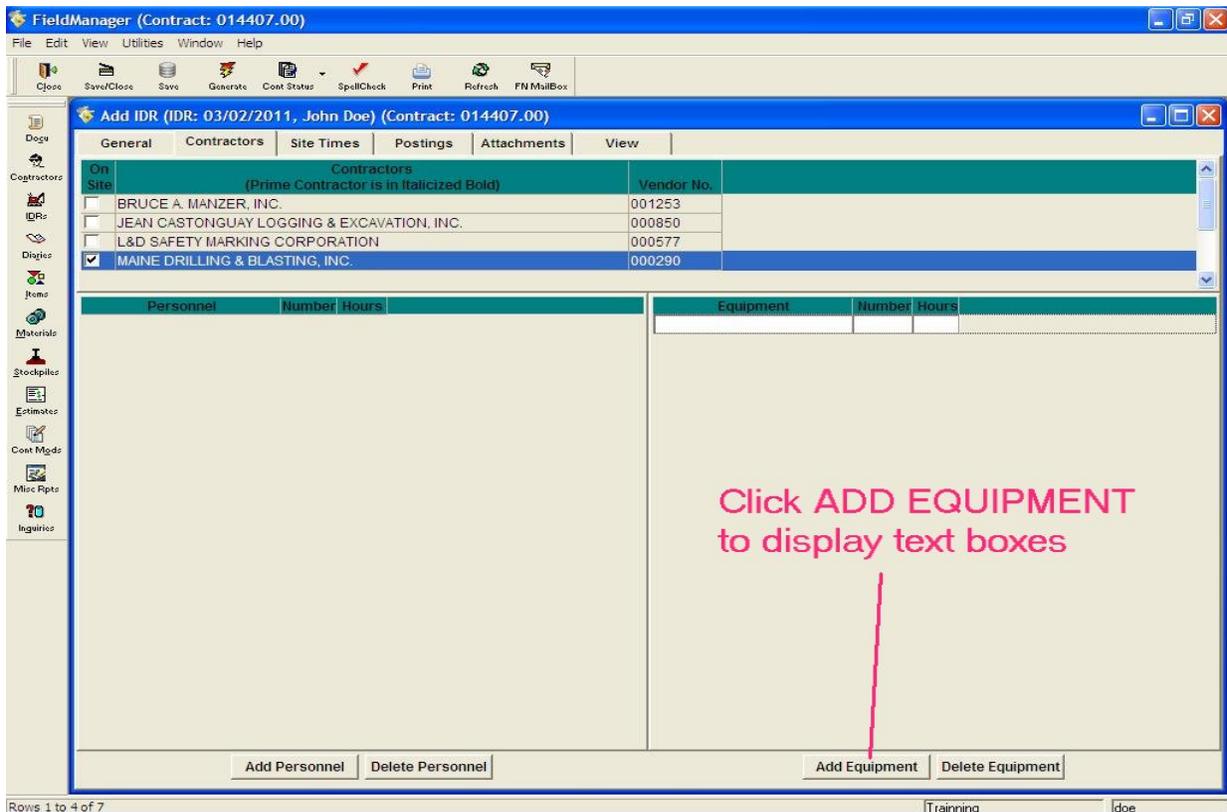
## 6.4 Adding Contractor Equipment to a New IDR

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 (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.

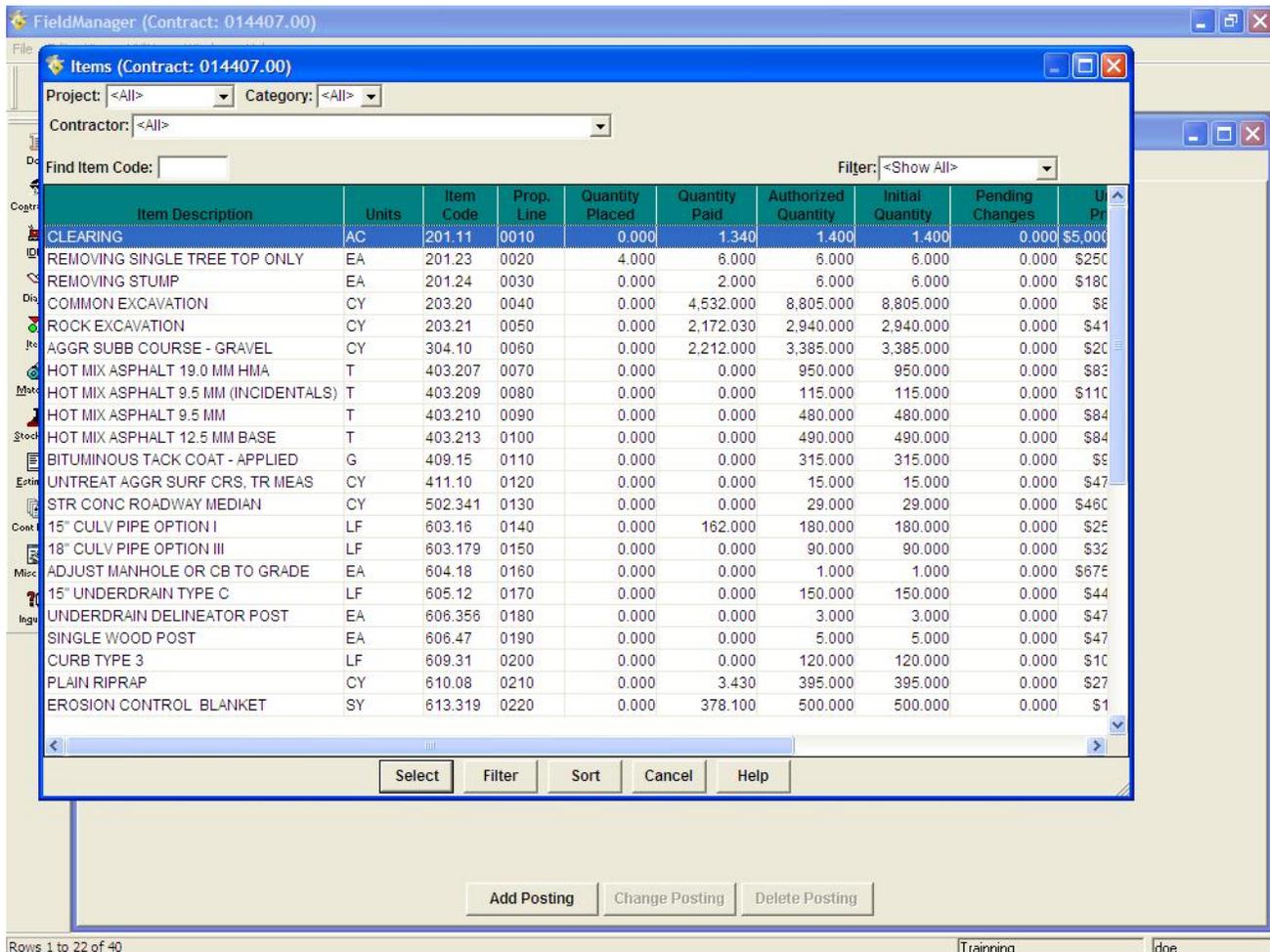
Click either **Save** or **Save/Close** on the **Window Toolbar** depending on how you would like to proceed.

## 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 (figure 6-6).



**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 (figure 6-7).

**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 (figure 6-8).

**Inspector's Daily Report**

MaineDOT  
Maine Department of Transportation

3/2/2011 1:27 PM  
FieldManager 4.7a

Contract: 014407.00, RUMFORD, HIGHWAY IMPROVEMENTS

IDR Date	Day of Week	Seq. No.	Import Date	Project Engineer	Resident Engineer
2/23/2011	Wednesday	1	N/A	JR PM SIGNING CONTRACT MOD	YOUR NAME
Inspector's Initials-Name		Federal Project Number		Elec. Attachments	
JS Jane Smith		HP-1440(700)X		None	
Prime Contractor PRATT & SONS, INC.					
Entered By		Revised By		Revision Date	Revision No.
S/A, Maine Department of Transportation		JD, John Doe		3/2/2011 1:27 PM	1
Temperatures			Weather		
Low: ° F High: ° F			Mostly sunny		
Comments					
Item 201.11 Clearing					
Subcontractor clearing from station 100+50 to 500+25 right. All wood and brush being stockpiled in place 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 left. Temporary lane closures used while performing this work. All wood stacked in place to be removed by the land owner as per ROW agreement. Brush and limbs chipped on site and removed. Work time - 8:30 am to 3:15 pm, 30 minute lunch					
Item 652.34 Cones					
First day of work with cones today - maximum set up today was 36					

Page 1 of 3   Previous Page   Next Page   Zoom In   Zoom Out   Sort Order

Rows 1 to 4 of 4   Training   doe

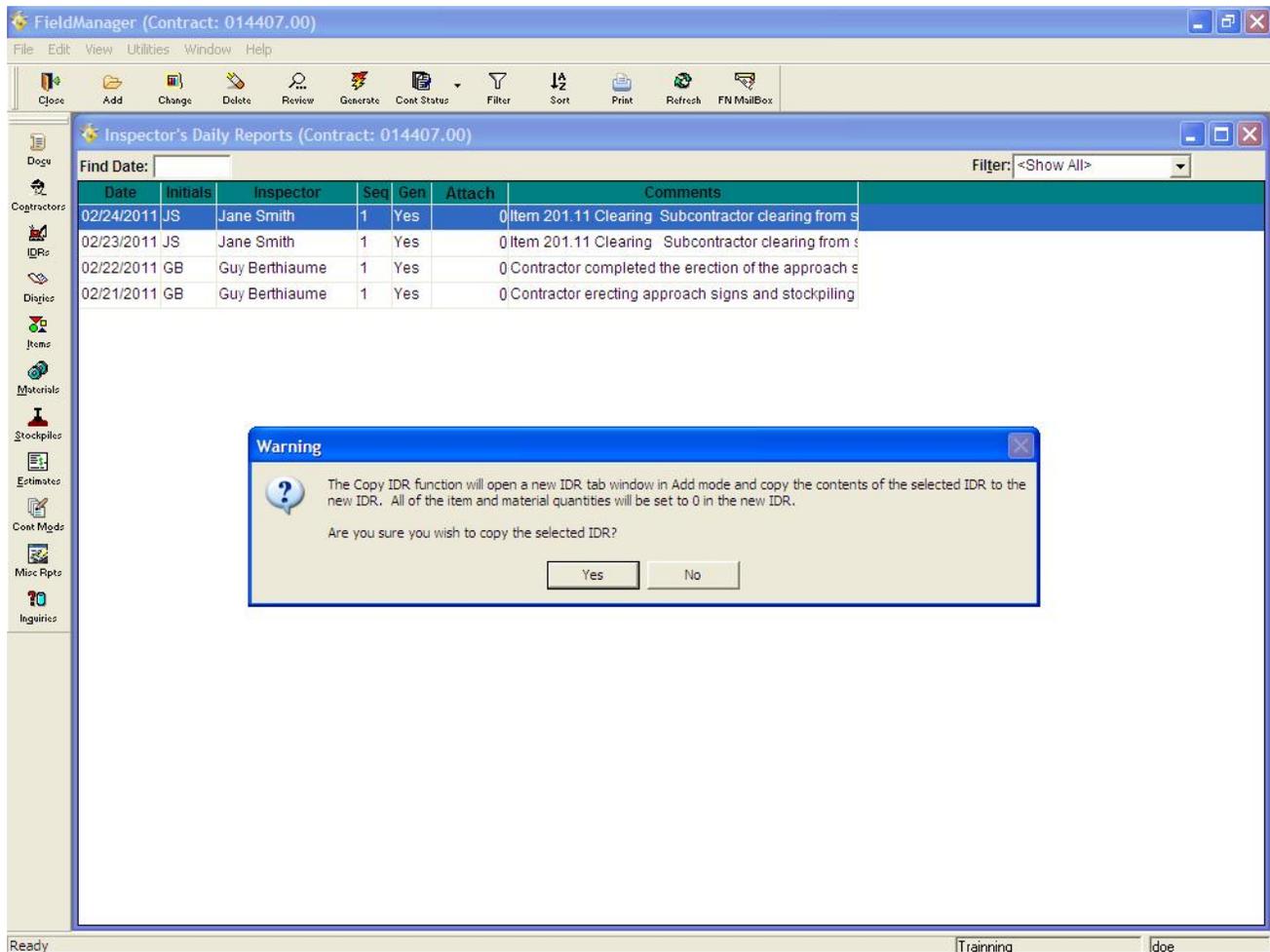
Figure 6-8 - IDR Draft View

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.



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

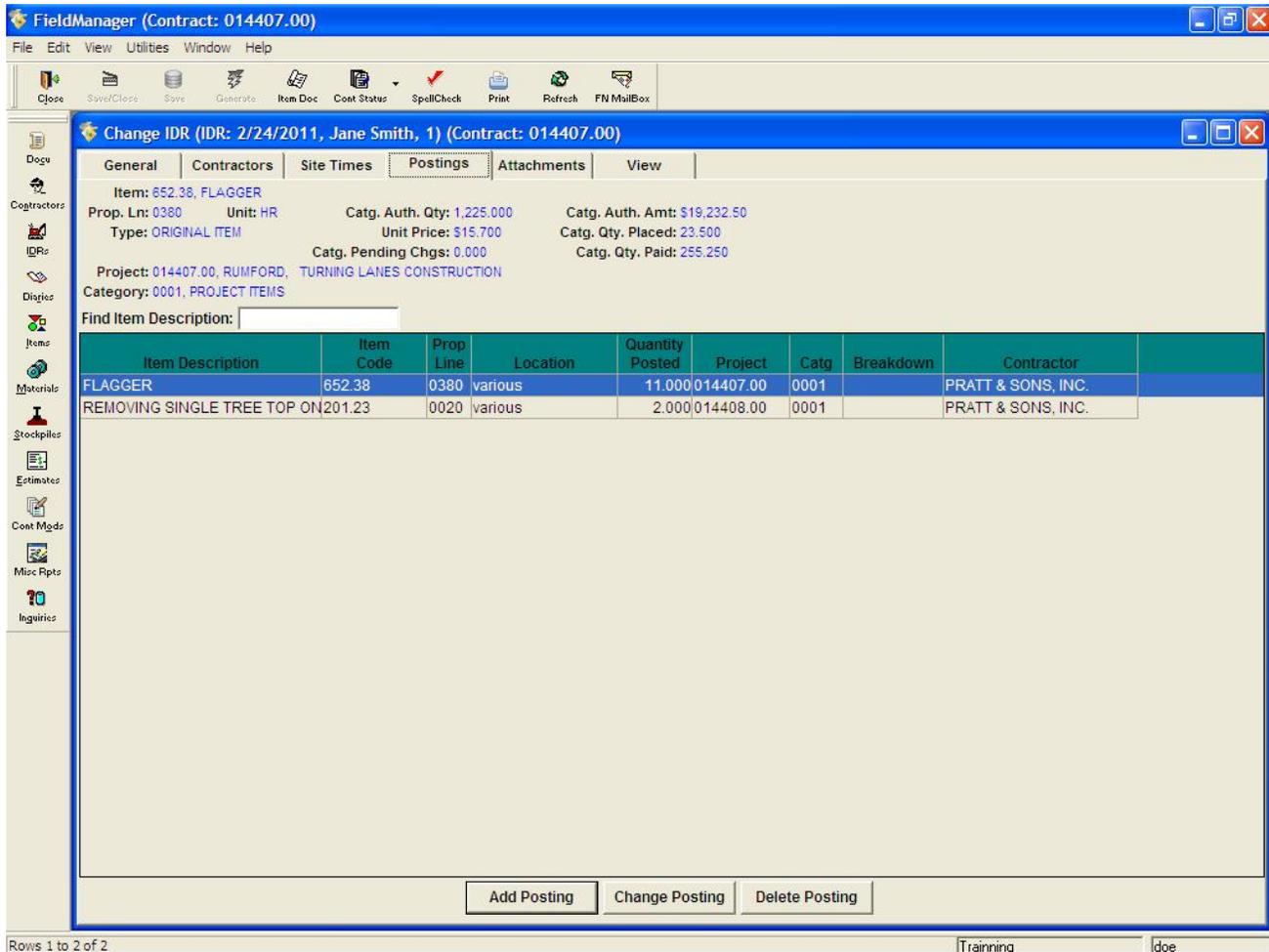
To delete contractor equipment, select the contract for which the existing IDR was created from the **Contracts list window**, and click **IDRs** on the **Application Toolbar** to display the **IDRs List Window**. Select the **IDR**, and click **Change** on the **Window Toolbar** to display the **Change 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 (figure 6-9).



**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.

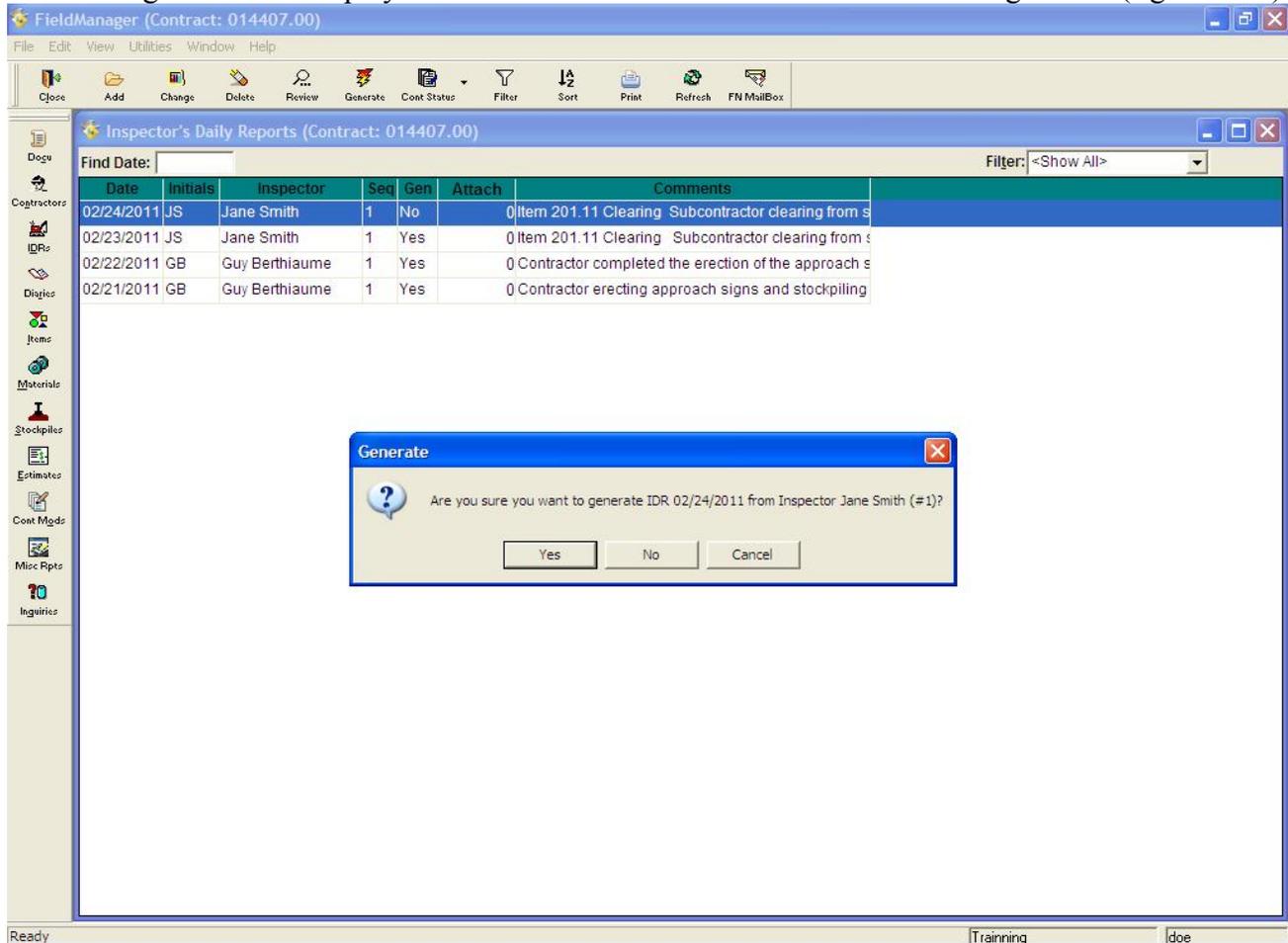
## 6.15 Generating the Inspector's Daily Report

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 (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. (figure 7-1).

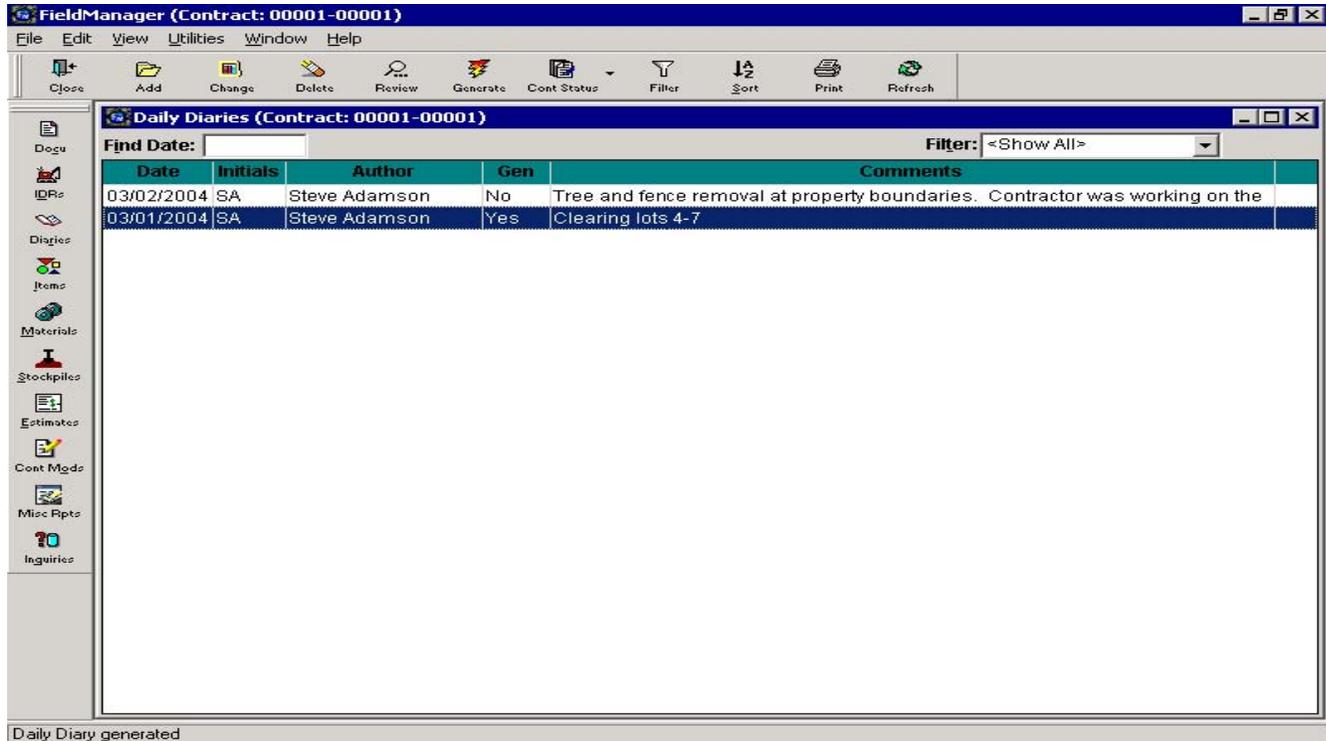


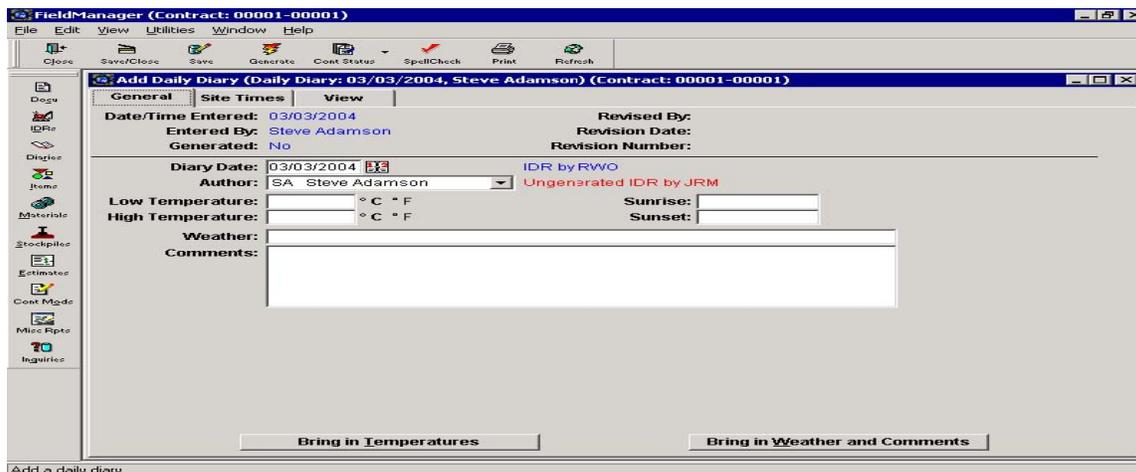
Figure 7-1 - Daily Diary List Window

### 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 (figure 7-2).



**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. Clicking **Bring In Weather and Comments** will not automatically bring weather information into the comments field from any IDR's for the same day but 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 (figure 7-3).

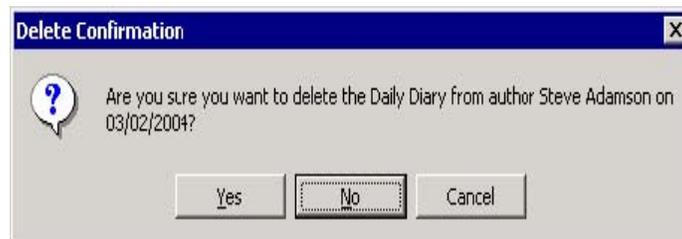


Figure 7-3 - Delete Confirmation

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**.

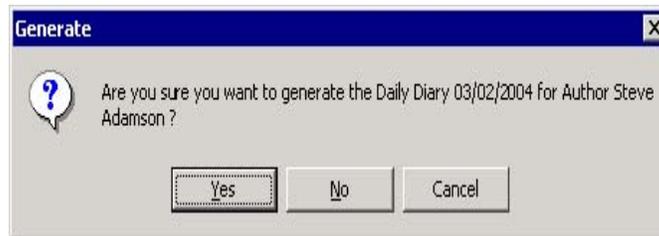
### 7.6 Generating a Daily Diary Record

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 (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.



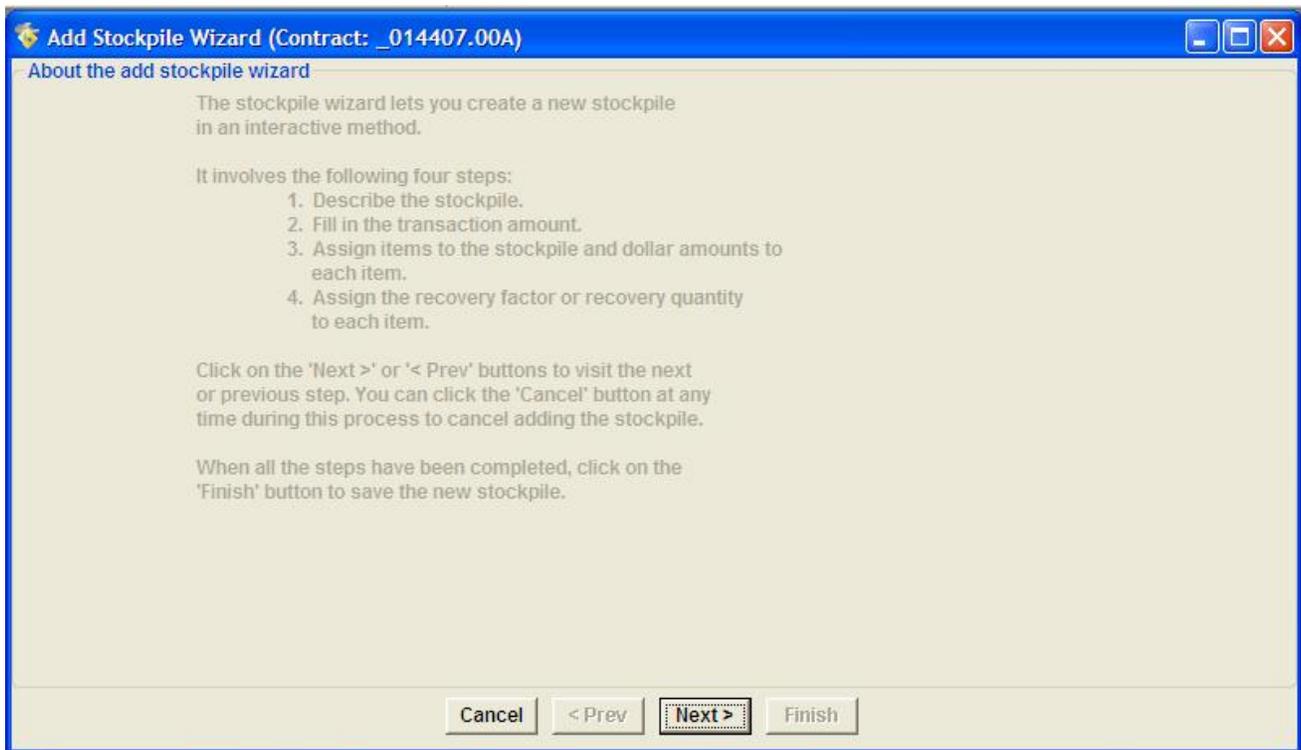
## 8. Working with Stockpiles

**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 (figure 8-1).



**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 (figure 8-2).

**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 (figure 8-3).

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

**Transaction Comments** 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 (figure 8-4).

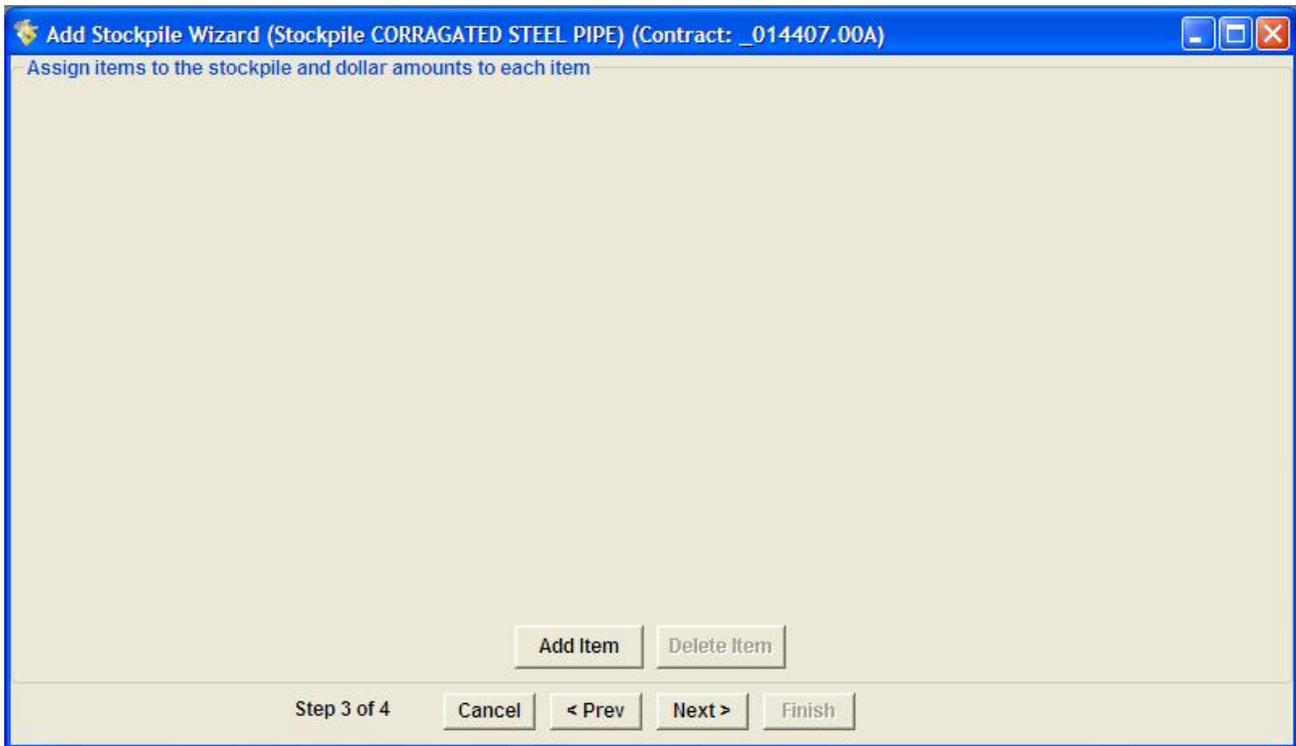


Figure 8-4

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

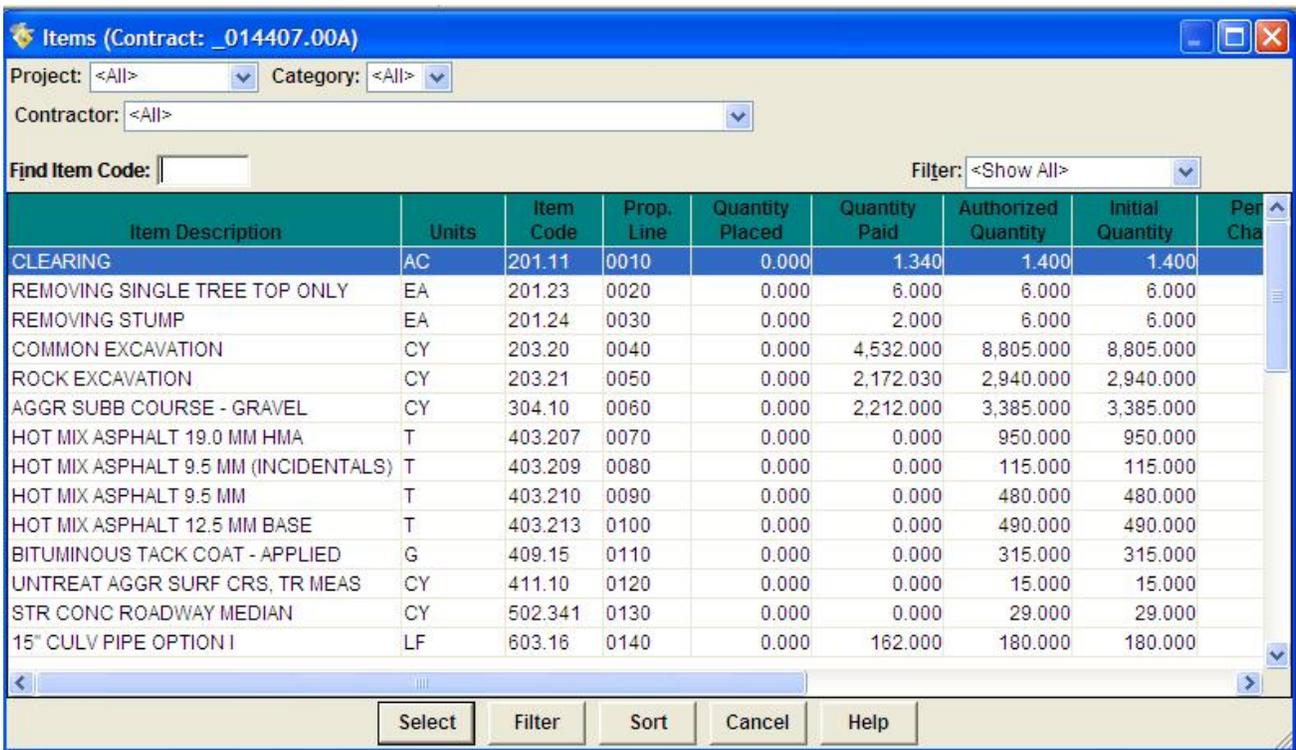


Figure 8-5

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

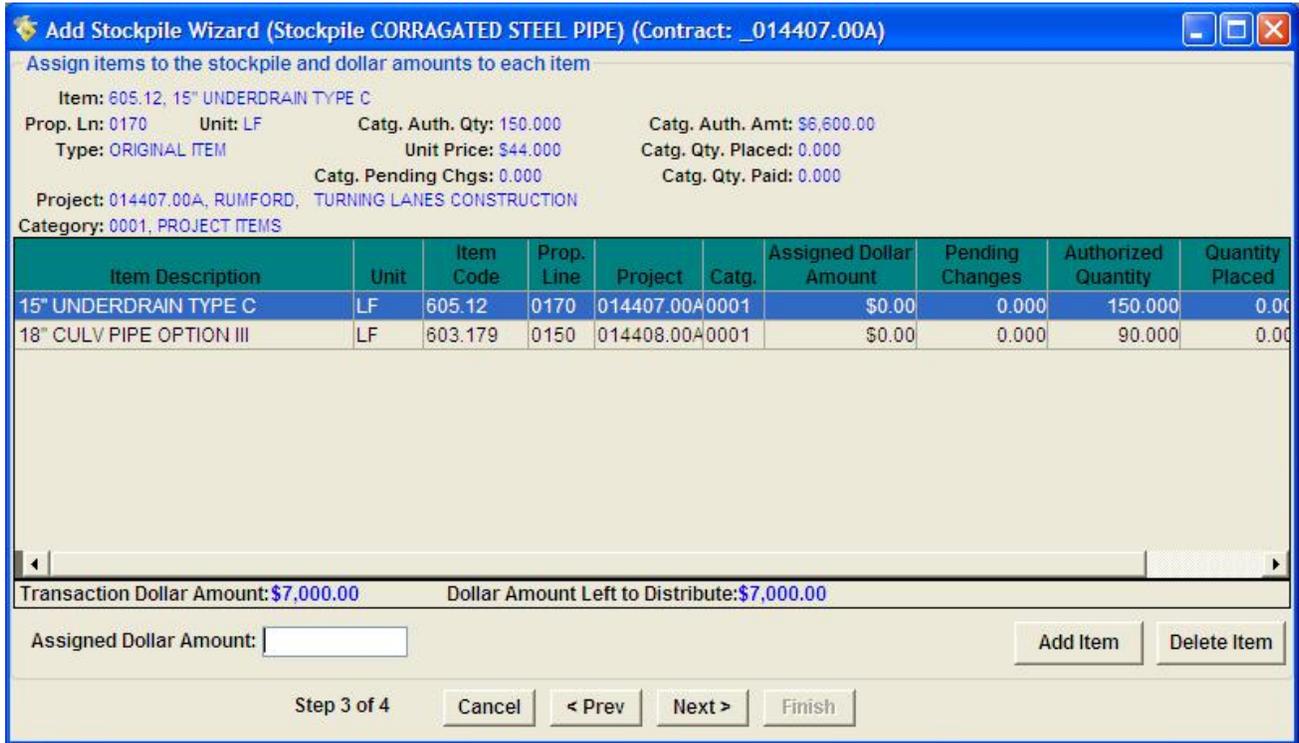


Figure 8-6

If an item selected is in more than one category, FieldManager software displays a **Multiple Categories** window (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.

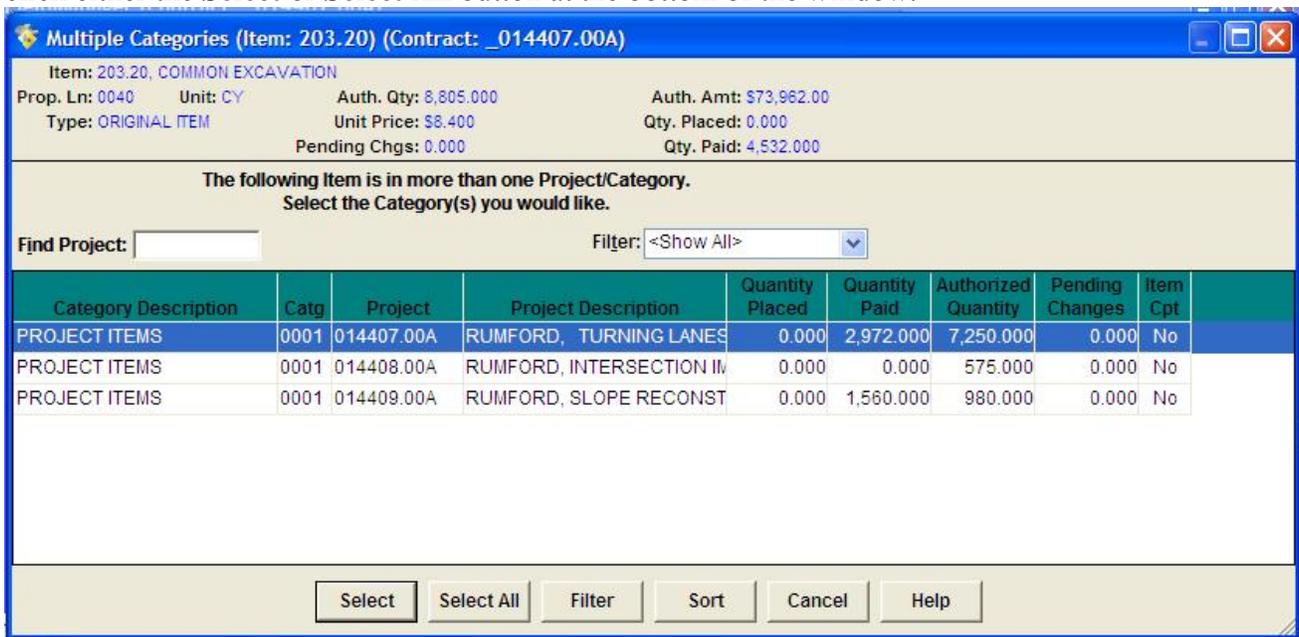


Figure 8-7

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.

**Add Stockpile Wizard (Stockpile CORRAGATED STEEL PIPE) (Contract: \_014407.00A)**

Assign items to the stockpile and dollar amounts to each item

Item: 603.179, 18" CULV PIPE OPTION III  
 Prop. Ln: 0150 Unit: LF Catg. Auth. Qty: 90.000 Catg. Auth. Amt: \$2,880.00  
 Type: ORIGINAL ITEM Unit Price: \$32.000 Catg. Qty. Placed: 0.000  
 Catg. Pending Chgs: 0.000 Catg. Qty. Paid: 0.000  
 Project: 014408.00A, RUMFORD, INTERSECTION IMPROVEMENTS  
 Category: 0001, PROJECT ITEMS

Item Description	Unit	Item Code	Prop. Line	Project	Catg.	Assigned Dollar Amount	Pending Changes	Authorized Quantity	Quantity Placed
15" UNDERDRAIN TYPE C	LF	605.12	0170	014407.00A	0001	\$5,000.00	0.000	150.000	0.00
18" CULV PIPE OPTION III	LF	603.179	0150	014408.00A	0001	\$2,000.00	0.000	90.000	0.00

Transaction Dollar Amount: \$7,000.00 Dollar Amount Left to Distribute: \$0.00

Assigned Dollar Amount:

Buttons: Add Item, Delete Item

Step 3 of 4 | Cancel | < Prev | Next > | Finish

**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 (figure 8-9).

**Add Stockpile Wizard (Stockpile CORRAGATED STEEL PIPE) (Contract: \_014407.00A)**

Assign the recovery factor or recovery quantity to each item

Item: 603.179, 18" CULV PIPE OPTION III  
 Prop. Ln: 0150 Unit: LF Catg. Auth. Qty: 90.000 Catg. Auth. Amt: \$2,880.00  
 Type: ORIGINAL ITEM Unit Price: \$32.000 Catg. Qty. Placed: 0.000  
 Catg. Pending Chgs: 0.000 Catg. Qty. Paid: 0.000  
 Project: 014408.00A, RUMFORD, INTERSECTION IMPROVEMENTS  
 Category: 0001, PROJECT ITEMS

Item Description	Unit	Item Code	Prop. Line	Project	Catg.	Assigned Dollar Amount	Recovery Factor	Recovery Quantity	Pending Changes	Aut Q
15" UNDERDRAIN TYPE C	LF	605.12	0170	014407.00A	0001	\$5,000.00	\$41.6667	120.000	0.000	
18" CULV PIPE OPTION III	LF	603.179	0150	014408.00A	0001	\$2,000.00			0.000	

Assigned Dollar Amount: \$2,000.00

Recovery Factor:

Recovery Quantity:  LF

Fastest: 62.500 LF; Slowest: 90.000 LF

The recovery factor is the dollar amount that the stockpile payment will be recovered per unit of item paid. The recovery quantity is the number of units (LF) of the item that you want to use to recover the \$2,000.00.

Step 4 of 4

**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 (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.

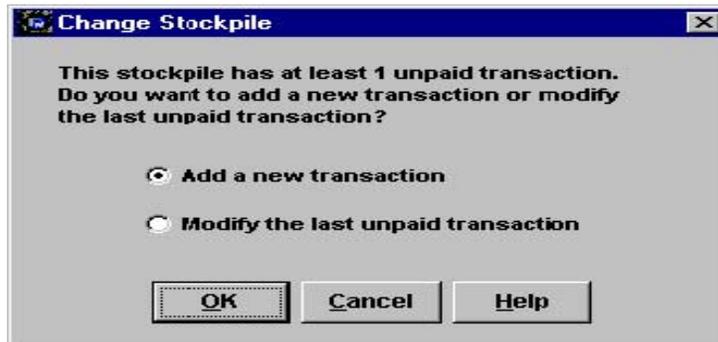


Figure 8-10

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 (figure 8-11).

Stockpile Summary By Stockpile (Contract: \_014407.00A)

**Stockpile Summary by Stockpile**

MaineDOT  
Maine Department of Transportation

2/28/2012 3:58 PM  
FieldManager 4.0a

Contract: \_014407.00A, RUMFORD, HIGHWAY IMPROVEMENTS

Stockpile Description: CORRAGATED STEEL PIPE  
Stockpile Type: 603E  
Stockpile Amount Remaining: \$7,000.00  
Comments: Pipe delivered and on project

---

Item: 15" UNDERDRAIN TYPE C Code: 605.12 Prop. Line: 0170

Project: 014407.00A, RUMFORD, TURNING LANES CONSTRUCTION  
Category: 0001, PROJECT ITEMS

Seq. No	Action Date	Action	Total Transaction Dollar Amount	Transaction Comments	Recovery Factor	Recovery Quantity	Action Dollar Amount	Est. No	Veh No
1	2/28/2012	Transaction	7,000.00	Item 603.179 = \$2,000 Item 605.12 = \$5,000	41.6667	120.000	5,000.00		
Amount Remaining:							\$5,000.00		

---

Item: 18" CULV PIPE OPTION III Code: 603.179 Prop. Line: 0150

Project: 014408.00A, RUMFORD, INTERSECTION IMPROVEMENTS  
Category: 0001, PROJECT ITEMS

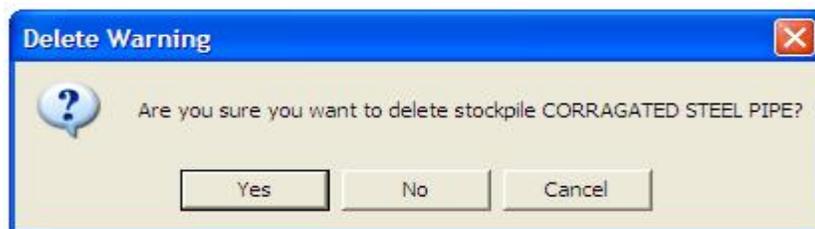
Seq. No	Action Date	Action	Total Transaction Dollar Amount	Transaction Comments	Recovery Factor	Recovery Quantity	Action Dollar Amount	Est. No	Veh No
1	2/28/2012	Transaction	7,000.00	Item 603.179 = \$2,000 Item 605.12 = \$5,000	28.5714	70.000	2,000.00		
Amount Remaining:							\$2,000.00		

**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<sup>®</sup> 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:

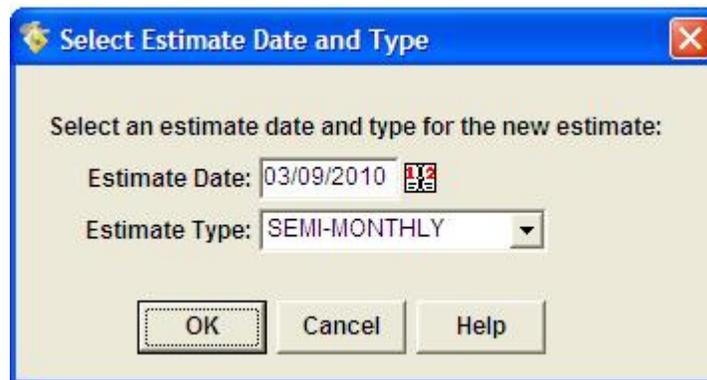
- All IDRs for the estimate must be generated.
- All Daily Diaries for the estimate must be generated.
- All items for the contract must be marked as completed.
- There can be no unapproved contract modifications (excluding those with a status of **deleted**).
- If the contract involves material usage, 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 (figure 9-1).



**Figure 9-1 - Estimate Date & Type**

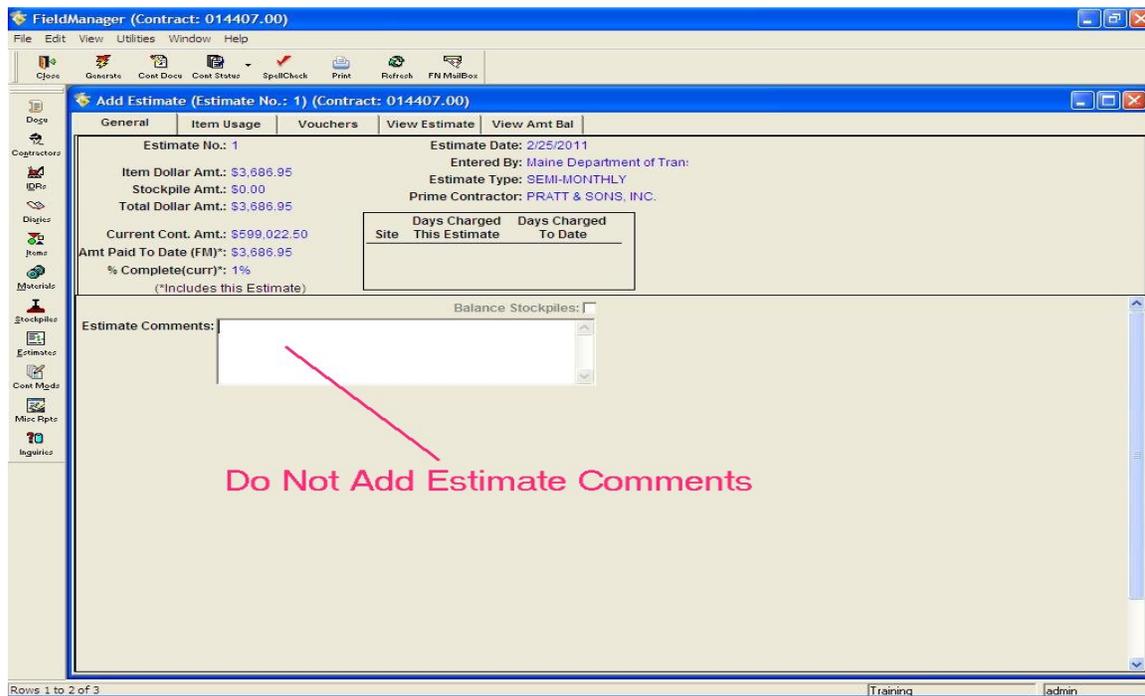
Use the Calendar icon to select the estimate date or type it in directly. The Estimate Date field will default to the current date. When producing the first estimate for a contract, you can enter any date that falls on or prior to the current date. When producing subsequent estimates, however, not only 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 assessed to the contractor. After **OK** has been selected on the warning message the Add Estimate tab window will open with the **GENERAL** tab displayed (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 placed 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 (figure 9-3).

FieldManager (Contract: 014407.00)

Add Estimate (Estimate No.: 1) (Contract: 014407.00)

General **Item Usage** Vouchers View Estimate View Amt Bal

Item: 652.34, CONE

Prop. Ln: 0350 Unit: EA Auth. Qty: 42.000 Auth. Amt: \$798.00 Qty. Placed: 36.000

Type: ORIGINAL ITEM Unit Price: 19.00000 Pending Chgs: 0.000 Qty. Paid: 89.000

Find Item Code:

Item Description	Item Code	Prop. Line	Insuff. Matl.	Overrun Flag	Atten.	Qty. this Estimate	Dollar Amount this Estimate	Allowable Qty.	Allowable Dollar Amount
CONE	652.34	0350	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	36.000	\$684.00	36.000	\$684.00
CONSTRUCTION SIGNS	652.35	0360	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	144.000	\$1,584.00	144.000	\$1,584.00
FLAGGER	652.38	0380	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23.500	\$368.95	23.500	\$368.95
MAINTENANCE OF TRAFFIC	652.36	0370	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1.000	\$50.00	1.000	\$50.00
REMOVING SINGLE TREE TOP	201.23	0020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.000	\$1,000.00	4.000	\$1,000.00

Review/Change

Rows 1 to 5 of 5 Training admin

Figure 9-3 - Estimate Item Usage Tab

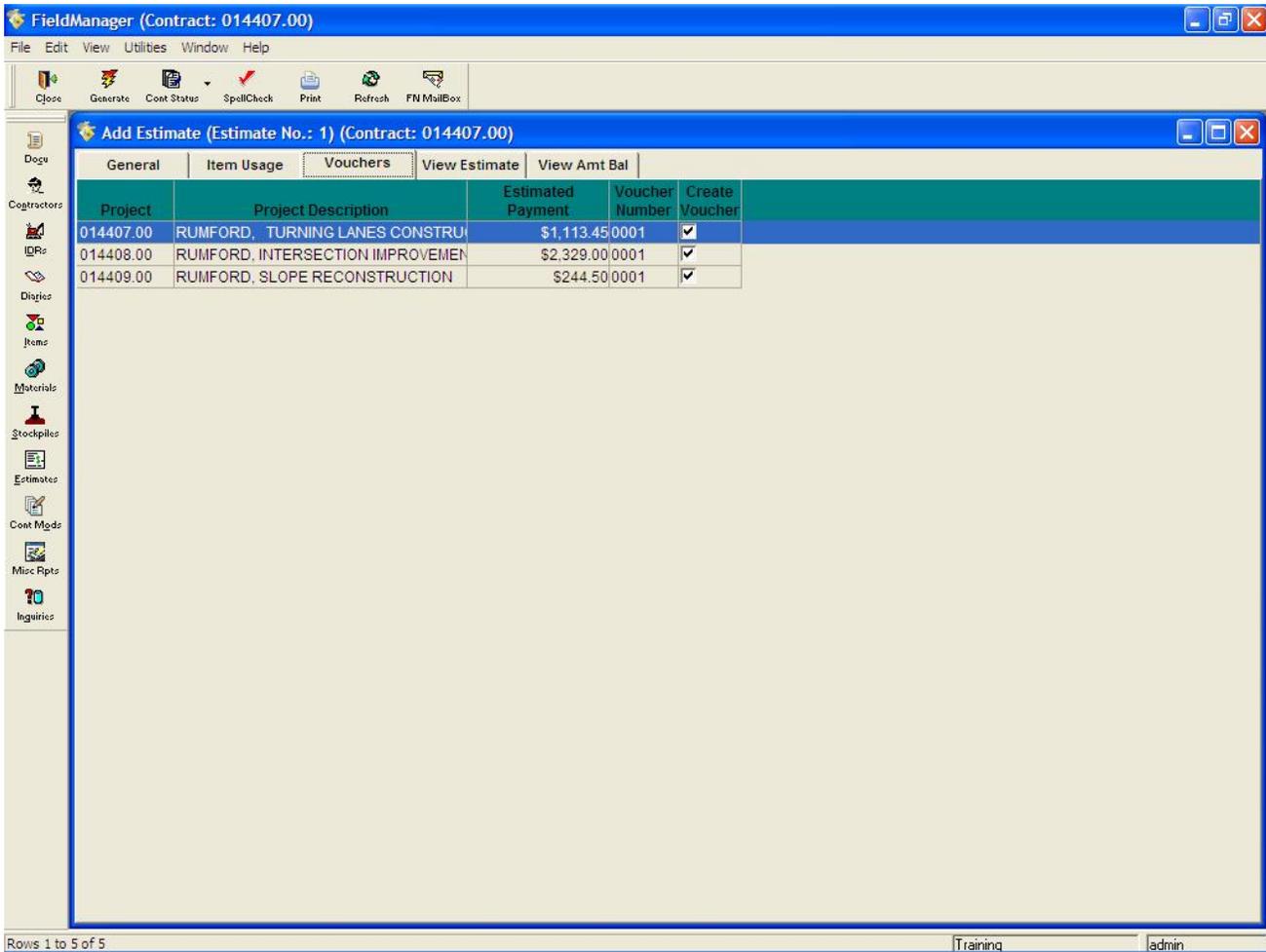
The items listed contain the following information.

<b>Item Description</b>	Description of the item with progress.
<b>Item Code</b>	Item code of the item with progress.
<b>Prop. Line</b>	The proposal line number.
<b>Insuff. Matl.</b>	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.
<b>Overrun Flag</b>	This field will be checked if the quantity placed is greater than the authorized quantity.
<b>Atten.</b>	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.
<b>Qty. this Estimate</b>	Quantity calculated by FieldManager software which is eligible for payment.
<b>Dollar Amount</b>	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.
<b>Allowable Qty.</b>	Maximum allowable quantity calculated by FieldManager software to be paid for the item on this estimate.
<b>Allowable Dollar</b>	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 (figure 9-4).



**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 (figure 9-5).

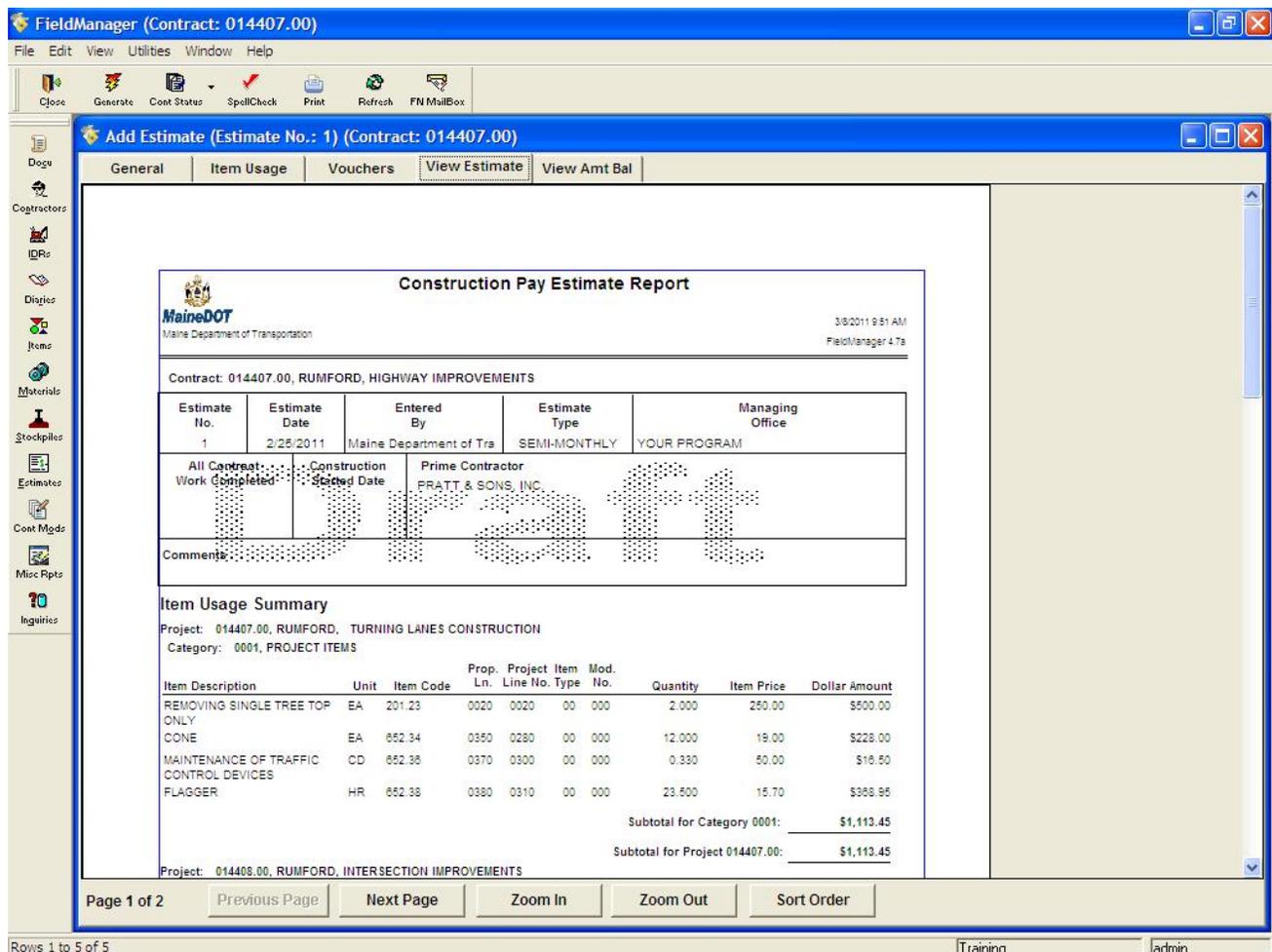


Figure 9-5 - View Estimate Tab

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.

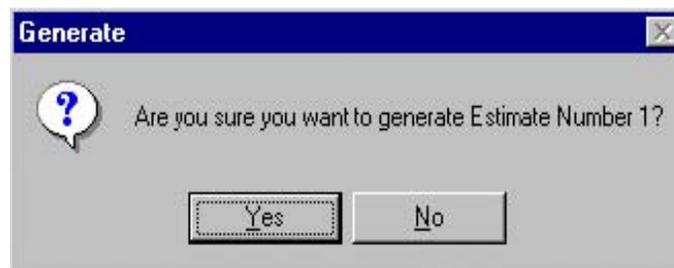
The following sections are on the report to verify information found there.

<b>Item Usage Summary</b>	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.
<b>Stockpile Summary</b>	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.
<b>Pre-Voucher Summary</b>	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.
<b>Current Time</b>	Lists the days charged to each site in the contract. Only available day <b>Charges</b> sites will show a value; all other sites will show <b>N/A</b> .

## 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 9-6**

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

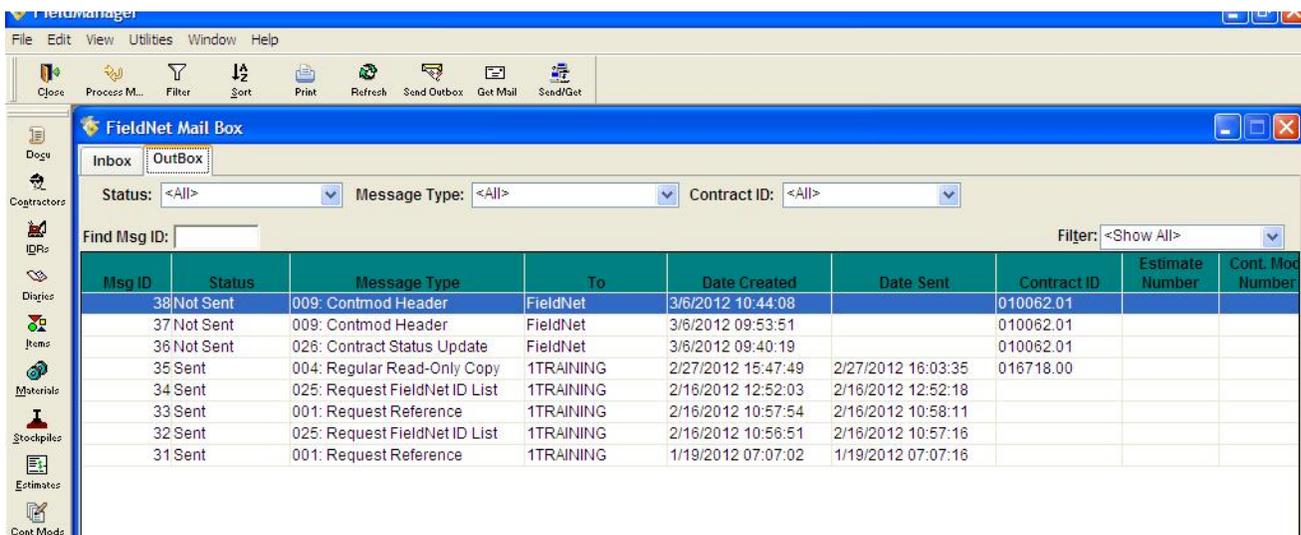
FieldManager software takes a moment to display the Print dialog boxes for each of the reports. Adjust the printer settings just as if you were printing a document from a word processing or spreadsheet program, and click **OK**.

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** or **Send/Get** located again on the top menu (figure 9-7).



Msg ID	Status	Message Type	To	Date Created	Date Sent	Contract ID	Estimate Number	Cont. Mod Number
38	Not Sent	009: Contmod Header	FieldNet	3/6/2012 10:44:08		010062.01		
37	Not Sent	009: Contmod Header	FieldNet	3/6/2012 09:53:51		010062.01		
36	Not Sent	026: Contract Status Update	FieldNet	3/6/2012 09:40:19		010062.01		
35	Sent	004: Regular Read-Only Copy	1TRAINING	2/27/2012 15:47:49	2/27/2012 16:03:35	016718.00		
34	Sent	025: Request FieldNet ID List	1TRAINING	2/16/2012 12:52:03	2/16/2012 12:52:18			
33	Sent	001: Request Reference	1TRAINING	2/16/2012 10:57:54	2/16/2012 10:58:11			
32	Sent	025: Request FieldNet ID List	1TRAINING	2/16/2012 10:56:51	2/16/2012 10:57:16			
31	Sent	001: Request Reference	1TRAINING	1/19/2012 07:07:02	1/19/2012 07:07:16			

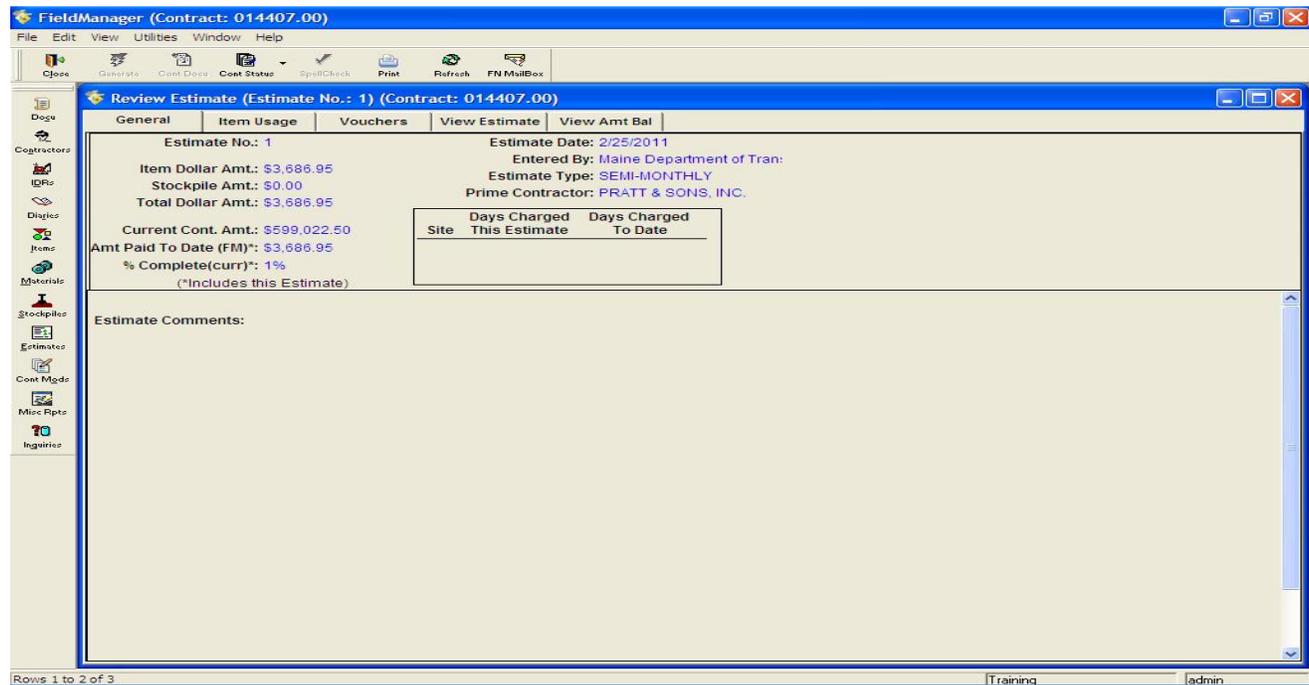
Figure 9-7 – FieldNet Mailbox - Outbox

After the estimate has been received, approved and processed within the FieldNet system and sent to the CAS system three messages will be sent to your FieldNet queue – the time this takes will vary but is usually completed within two business days. These messages will need to be retrieved prior to being able to generate the next estimate and is done by going to your FN Mailbox and clicking **Get Mail** or **Send/Get** and then **Processing** (double clicking) the received messages – when receiving more than one message from FieldNet the lower numbered **Msg ID** should be processed first. The first message will be a text file telling you that the estimate has been approved and the second message will be a text copy of the estimate sent in – these two messages can just be closed after being **Processed** (opened). 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. On occasion during system maintenance or a crash the contract refresh will not be sent to your queue. If this happens you will need to go to **File** then down to **FieldNet** and over to **Request Contract Refresh from FieldNet**. This will produce a drop down list of all of the available contracts on your machine – choose the desired contract and click **Send Request** – this only sends the message to your FieldNet mailbox where you will then need to **Send Outbox** – in 10 to 20 minutes you will then be able to **Get Mail** and **Process** the received contract refresh.

## 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 (figure 9-8).



**Figure 9-8 – Review Estimate**

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 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 (figure 10-1).

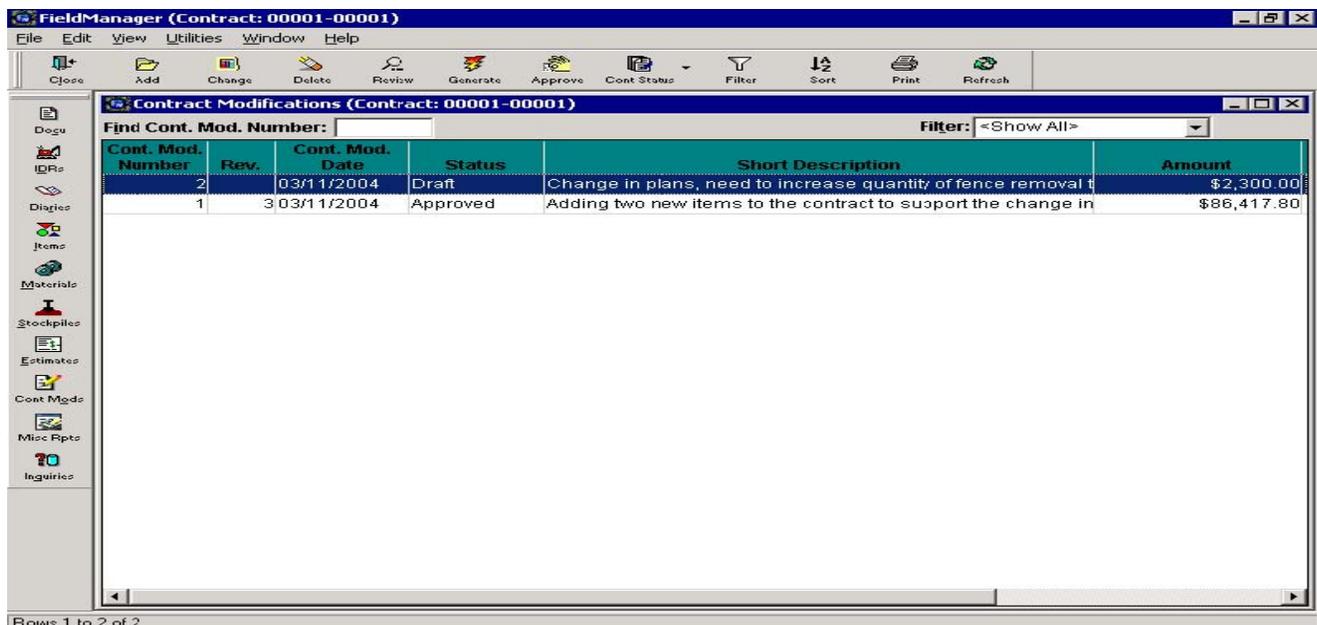


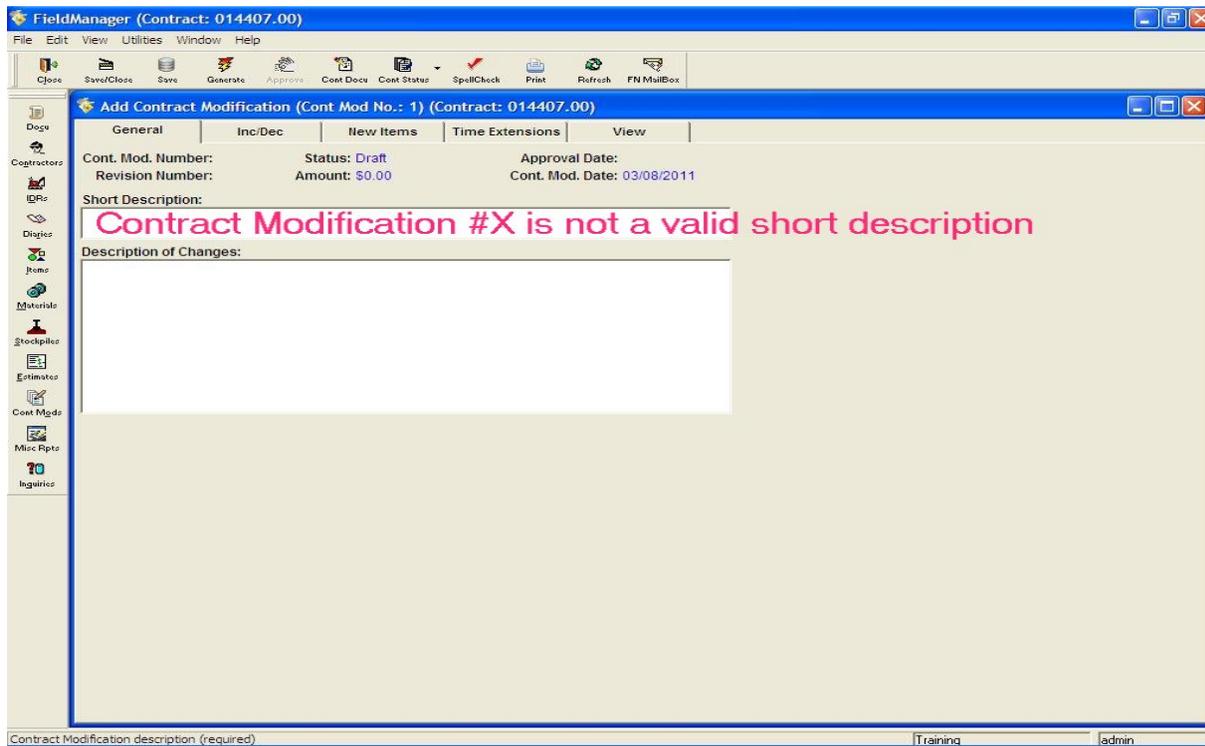
Figure 10-1. Contract Modification List Window

### 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 (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 modification. 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 (figure 10-3).

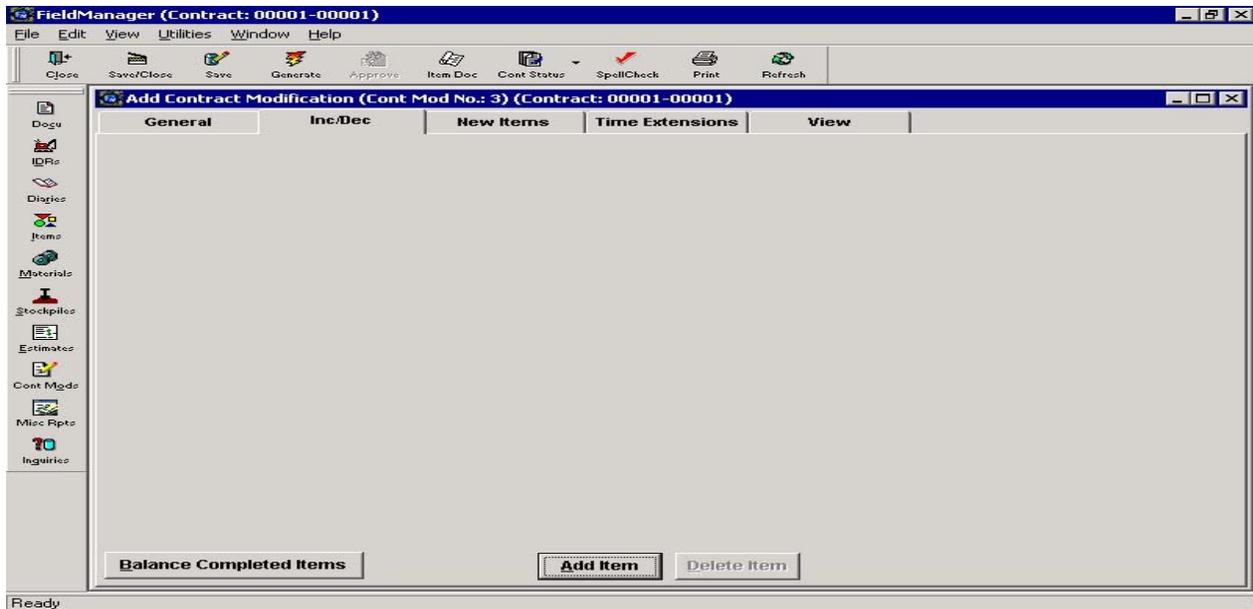
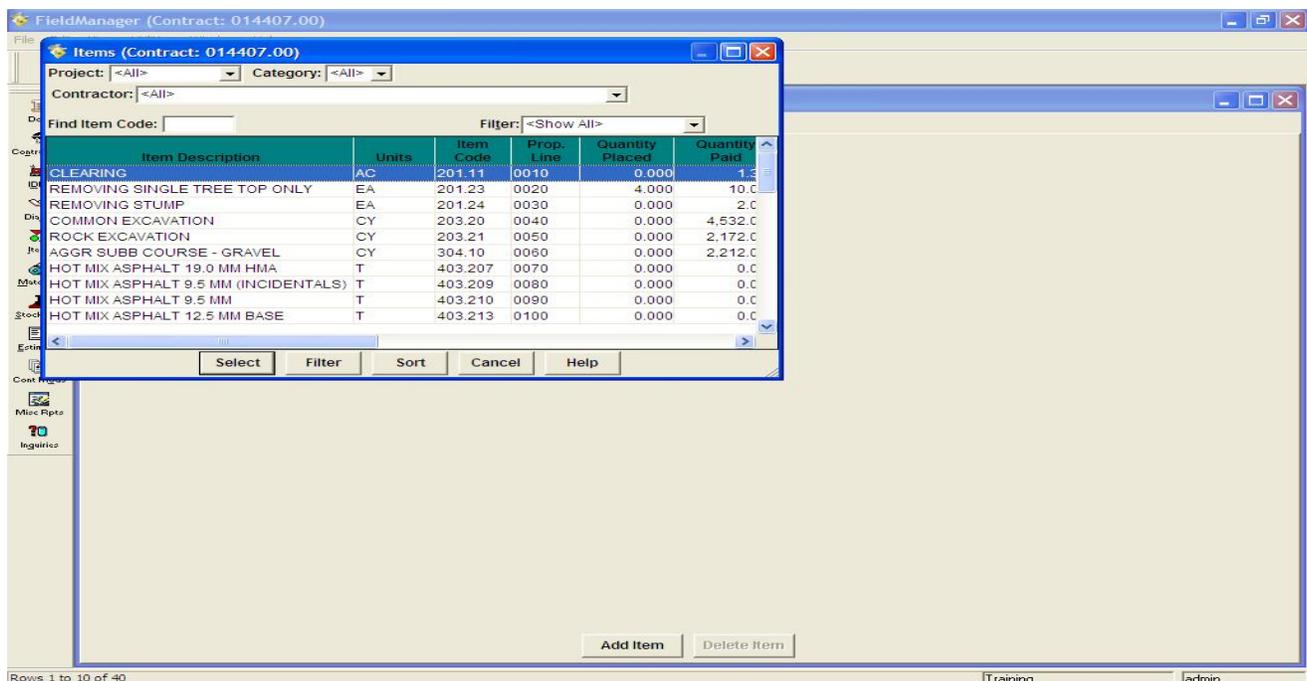


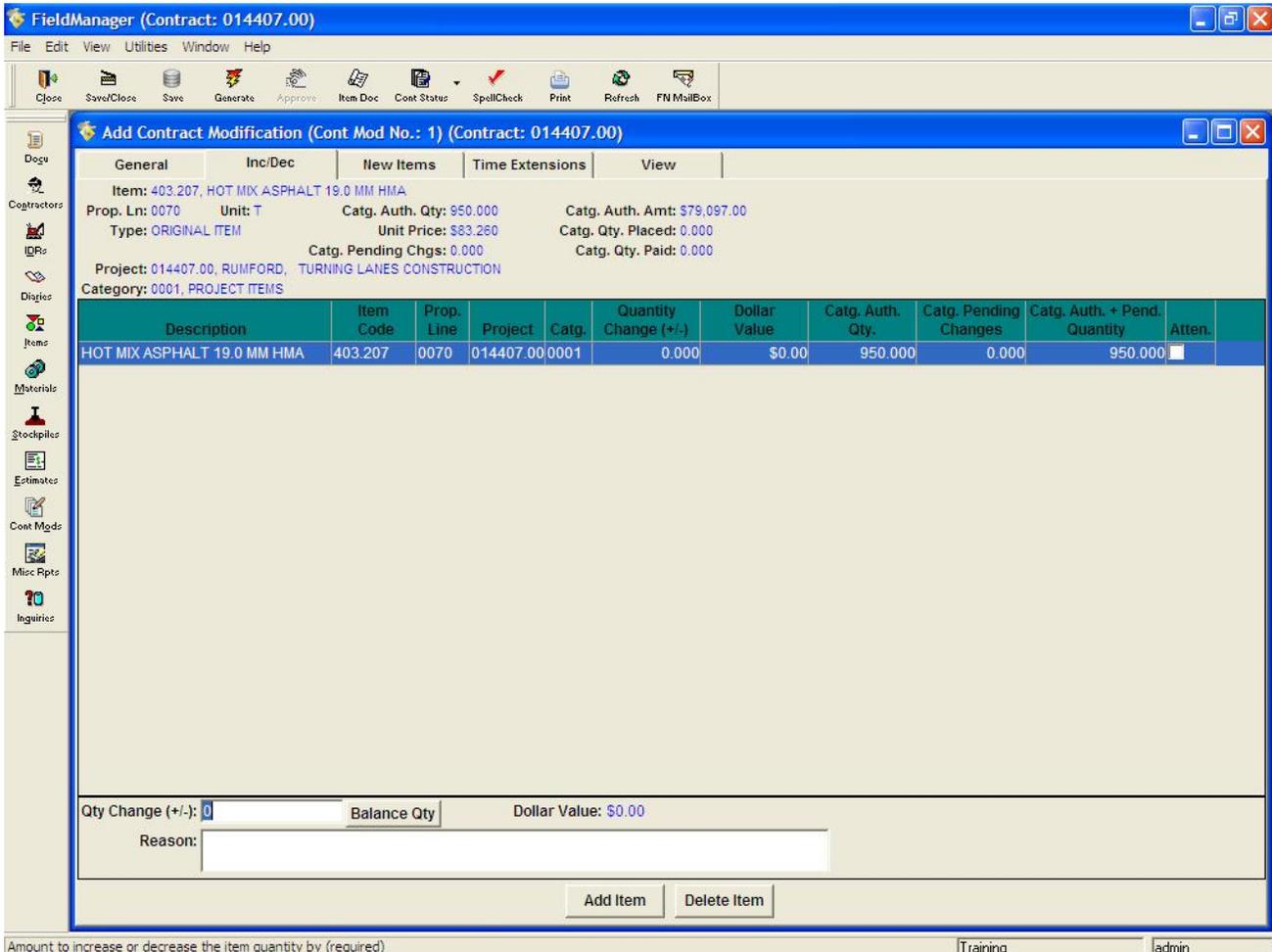
Figure 10-3 - Contract Mod Inc/Dec Tab

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 (figure 10-4).



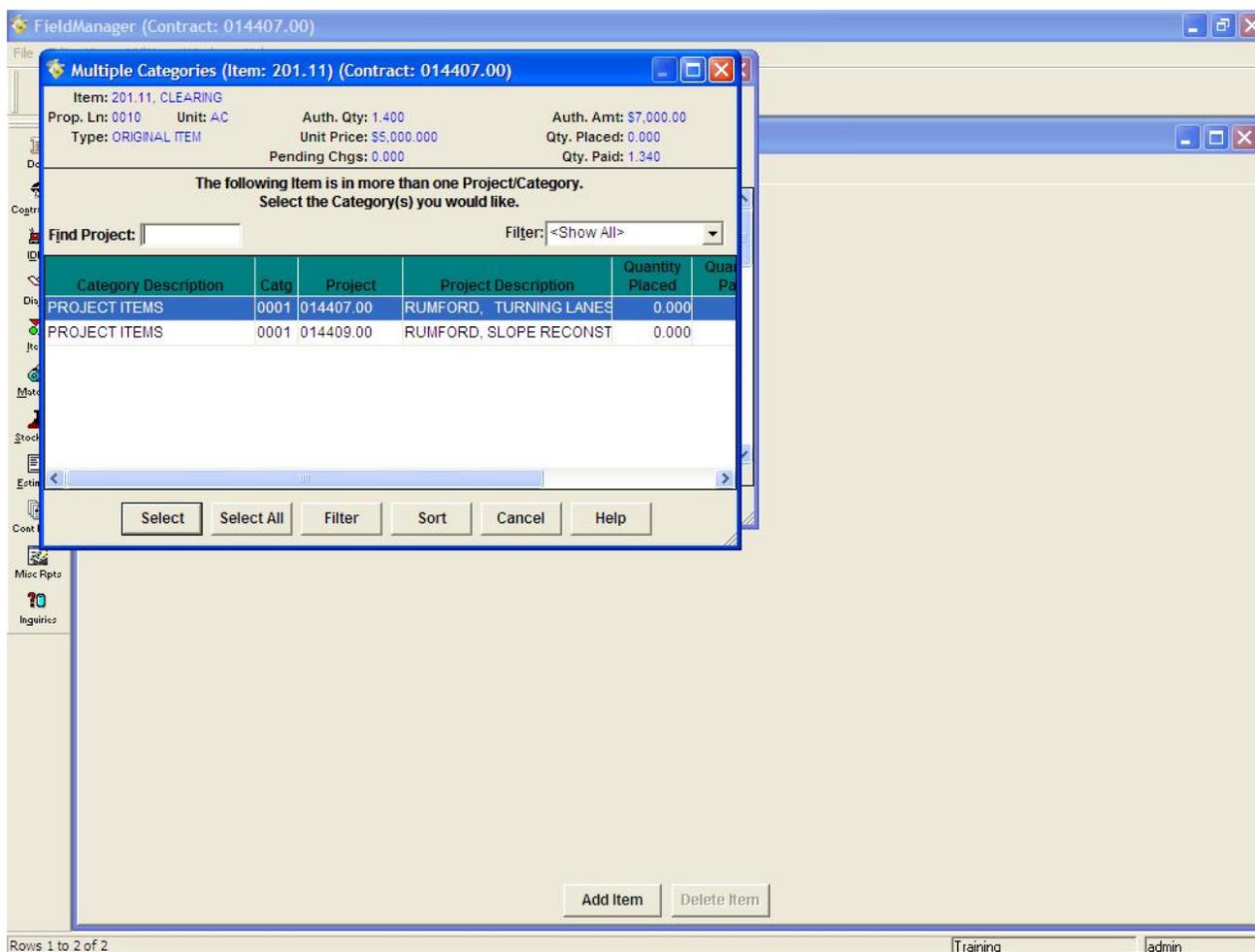
**Figure 10-4 - Contract Mod Inc/Dec Tab**

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



**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 (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.



**Figure 10-6 - Multiple Categories**

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.

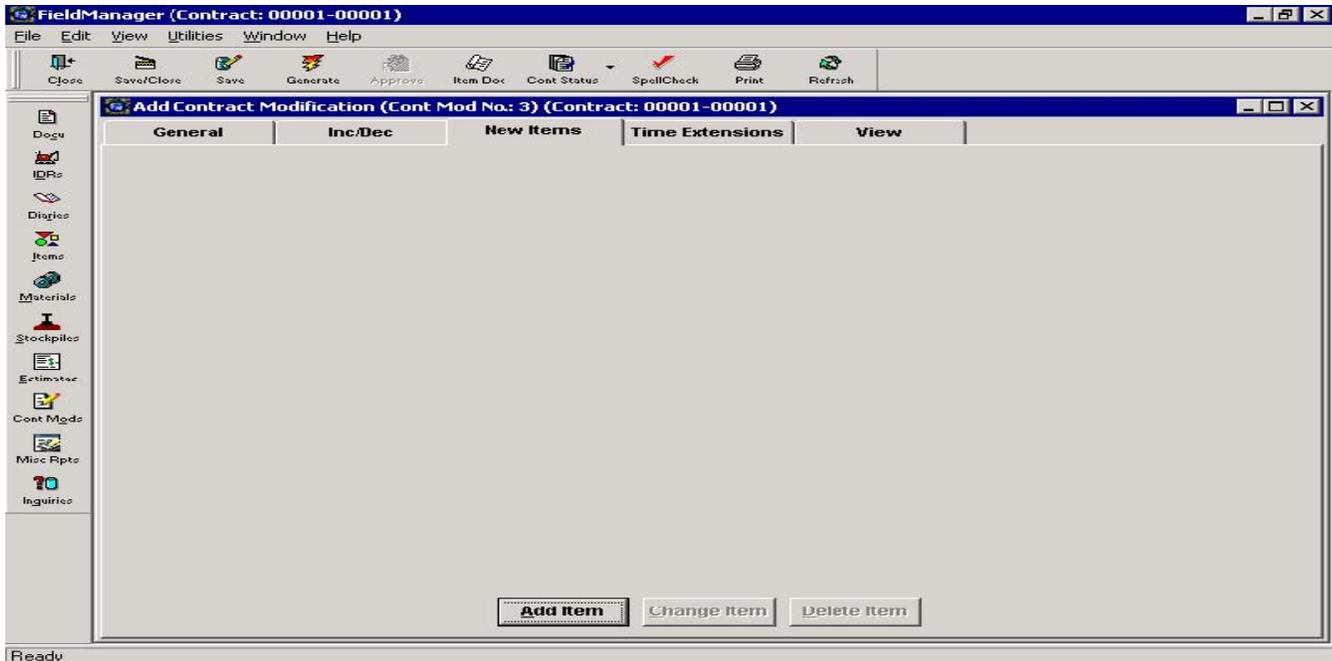
Click either **SAVE** or **SAVE/CLOSE** on the Window Toolbar depending on how you would like to proceed.

#### **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 (figure 10-7).



**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.



**Figure 10-8**

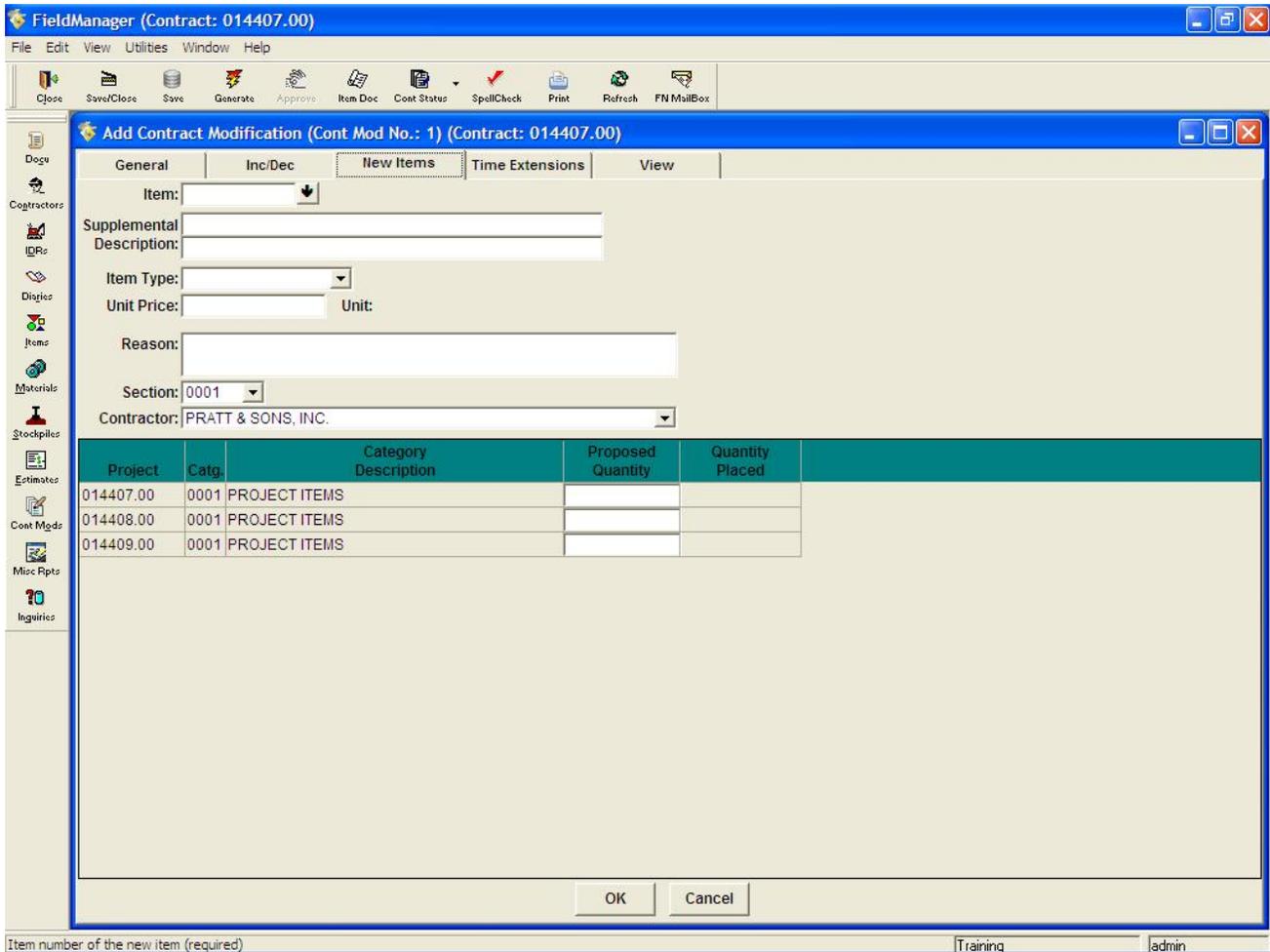
Choose one of the following two methods to add the item(s) through the contract modification.

### ***Adding a New Item***

To add a new item, choose the **ADD A NEW ITEM** option in the Items dialog box (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 (figure 10-9).



**Figure 10-9 - New Item Information**

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

<b>Item</b>	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.
<b>Item Type</b>	A code value representing the kind of item. (Required) Click the dropdown arrow to reveal your agency's defined Item Types (normally <b>Change Order</b> ).
<b>Unit Price</b>	The cost of one unit of the new item selected. (Required) This price cannot be negative.
<b>Reason</b>	The reason the item needs to be added to the contract. (Required)
<b>Section</b>	The number assigned to the grouping of proposal work items. (Required)
<b>Proposed Quantity</b>	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.
<b>Supplemental Description</b>	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.

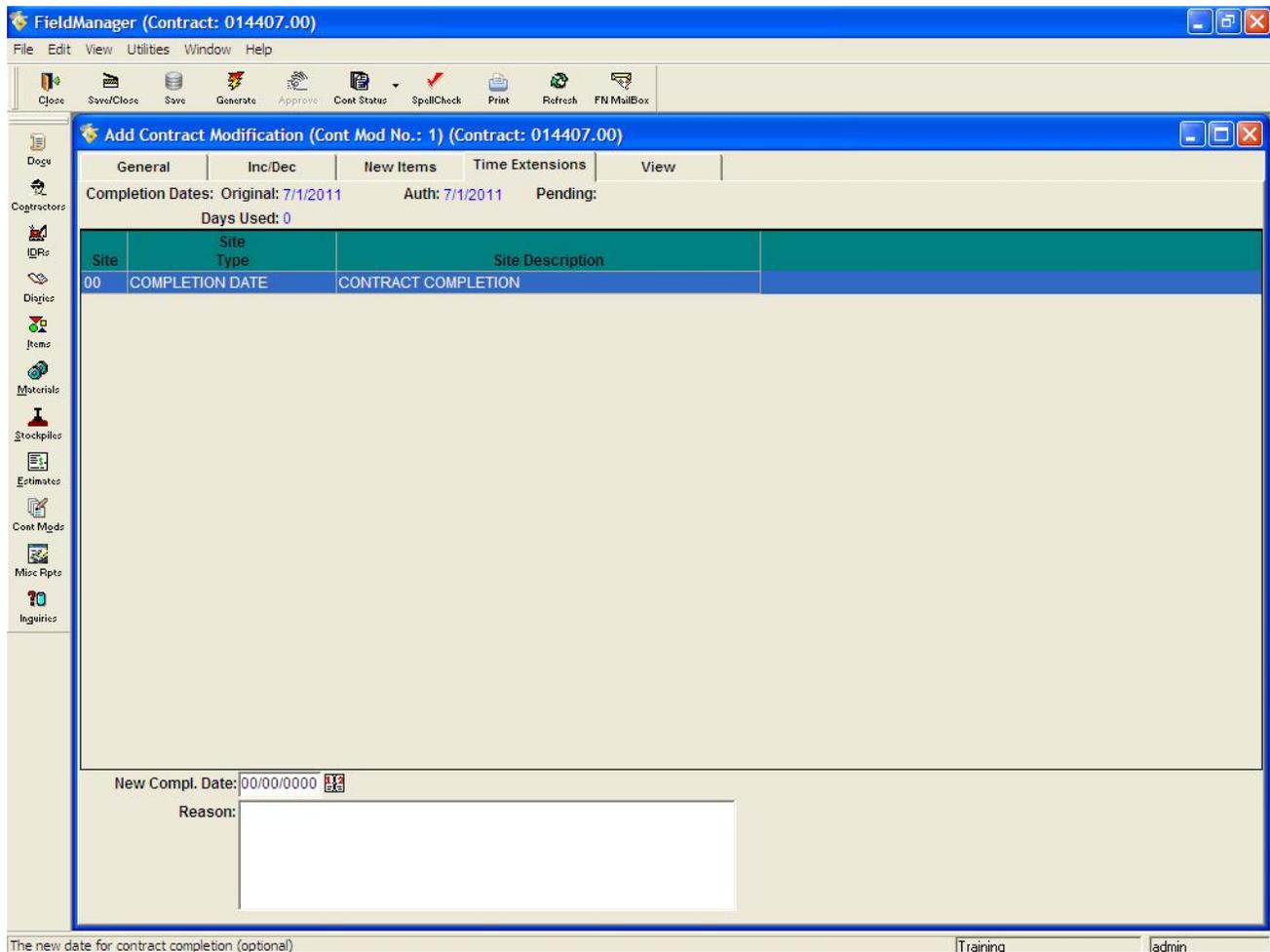
Note: If the category to associate the item with is not available, it must be brought into FieldManager software through your agency's central office contract administration.

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 (figure 10-10).



**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 (figure 10-11).

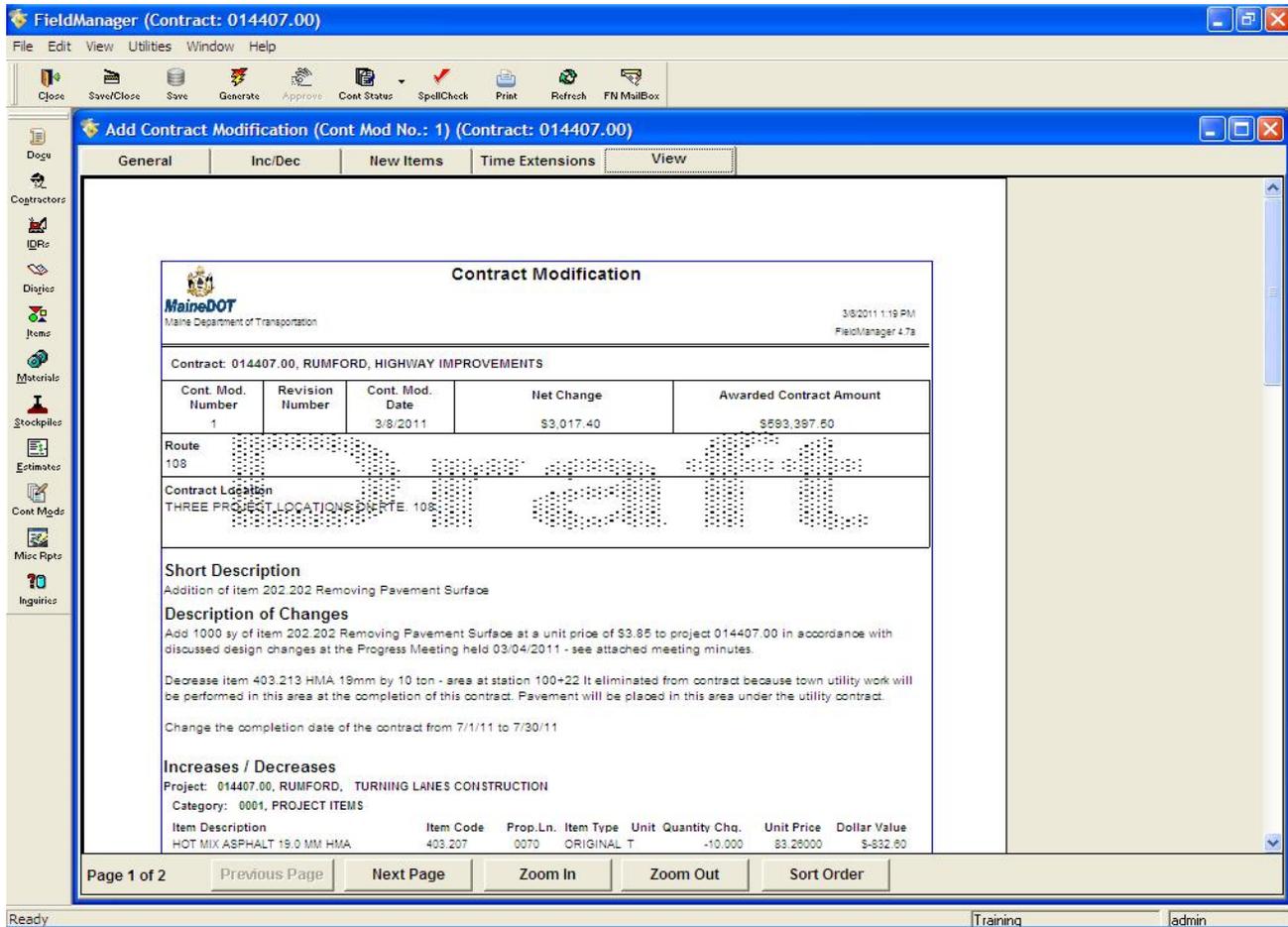


Figure 10-11 - View Tab

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 (figure 10-12).

The screenshot shows the 'FieldManager (Contract: 014407.00)' application window. The 'Change Contract Modification (Cont Mod No.: 1) (Contract: 014407.00)' window is open, with the 'View' tab selected. The window displays the following information:

**Contract Modification**  
 MaineDOT  
 Maine Department of Transportation  
 3/8/2011 1:24 PM  
 FieldManager 4.7a

Contract: 014407.00, RUMFORD, HIGHWAY IMPROVEMENTS

Cont. Mod. Number	Revision Number	Cont. Mod. Date	Net Change	Awarded Contract Amount
1	2	3/8/2011	\$3,017.40	\$593,397.50

Route: 108  
 Contract Location: THREE PROJECT LOCATIONS ON RTE. 108.

**Short Description**  
 Addition of item 202.202 Removing Pavement Surface

**Description of Changes**  
 Add 1000 sy of item 202.202 Removing Pavement Surface at a unit price of \$3.95 to project 014407.00 in accordance with discussed design changes at the Progress Meeting held 03/04/2011 - see attached meeting minutes.  
 Decrease item 403.213 HMA 19mm by 10 ton - area at station 100+22 It eliminated from contract because town utility work will be performed in this area at the completion of this contract. Pavement will be placed in this area under the utility contract.  
 Change the completion date 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 Description	Item Code	Prop.Ln.	Item Type	Unit	Quantity Chg.	Unit Price	Dollar Value
HOT MIX ASPHALT 19.0 MM HMA	403.207	0070	ORIGINAL T		-10.000	\$3.28000	\$-328.00

Page 1 of 2 | Previous Page | Next Page | Zoom In | Zoom Out | Sort Order

**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.

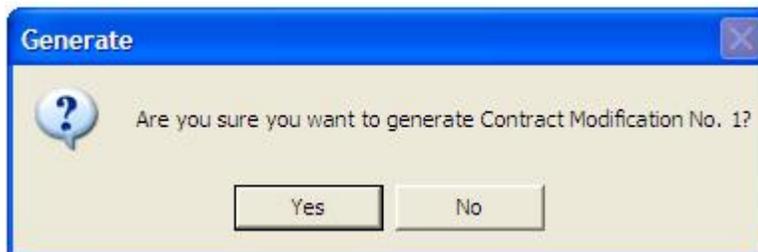
## 10.9 Generating a Contract Modification

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.

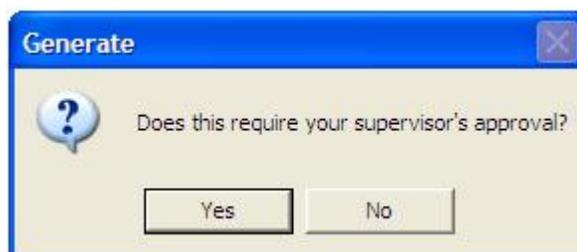
As shown in Figure 10-13, FieldManager displays a Generate window that identifies the contract modification to generate.



**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 (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 very basic in 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.



**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

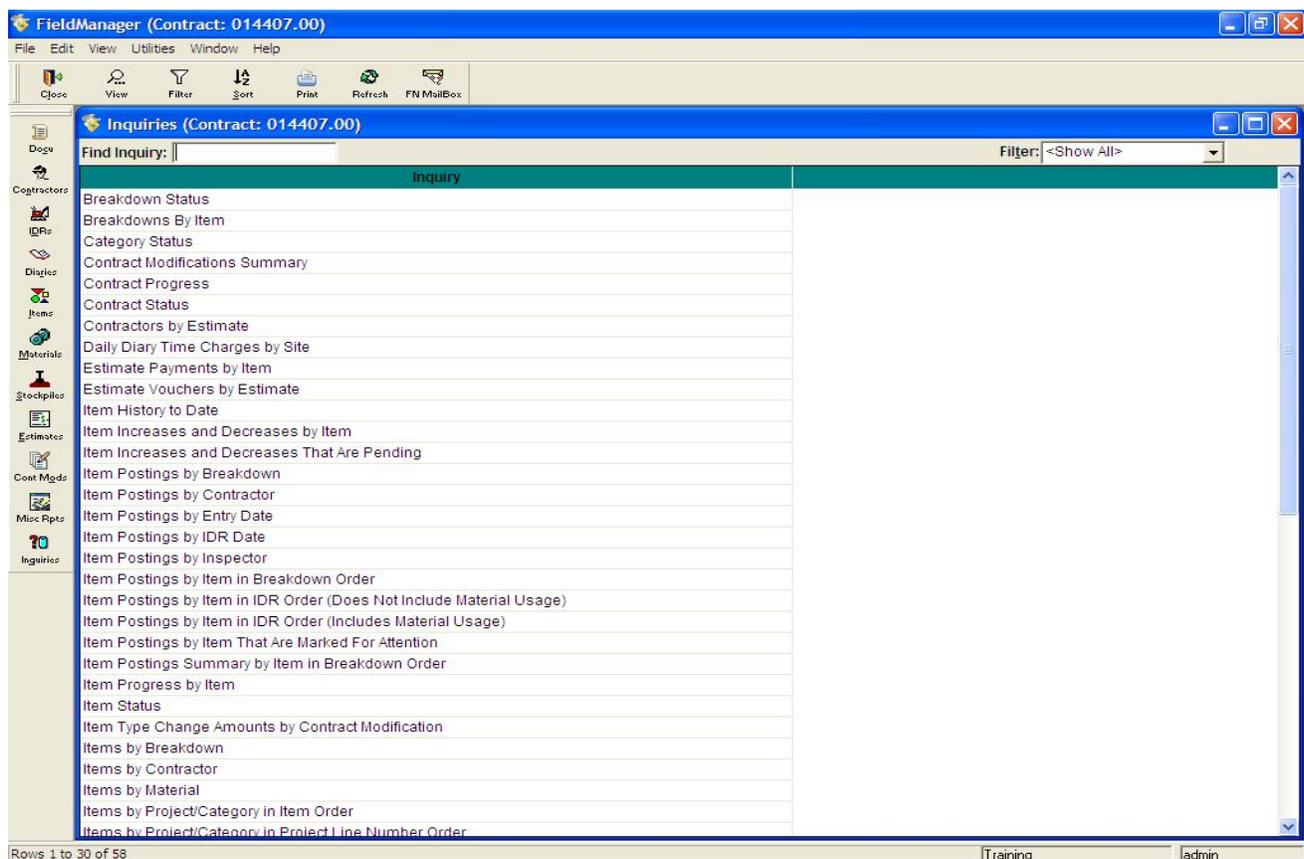
While managing a contract on a computer is much less cumbersome than pen and paper methods, there is still a need for some paper reporting and tracking of construction contracts. FieldManager® software includes inquiry and report functions that help keep track of, and report on, contract progress.

### 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

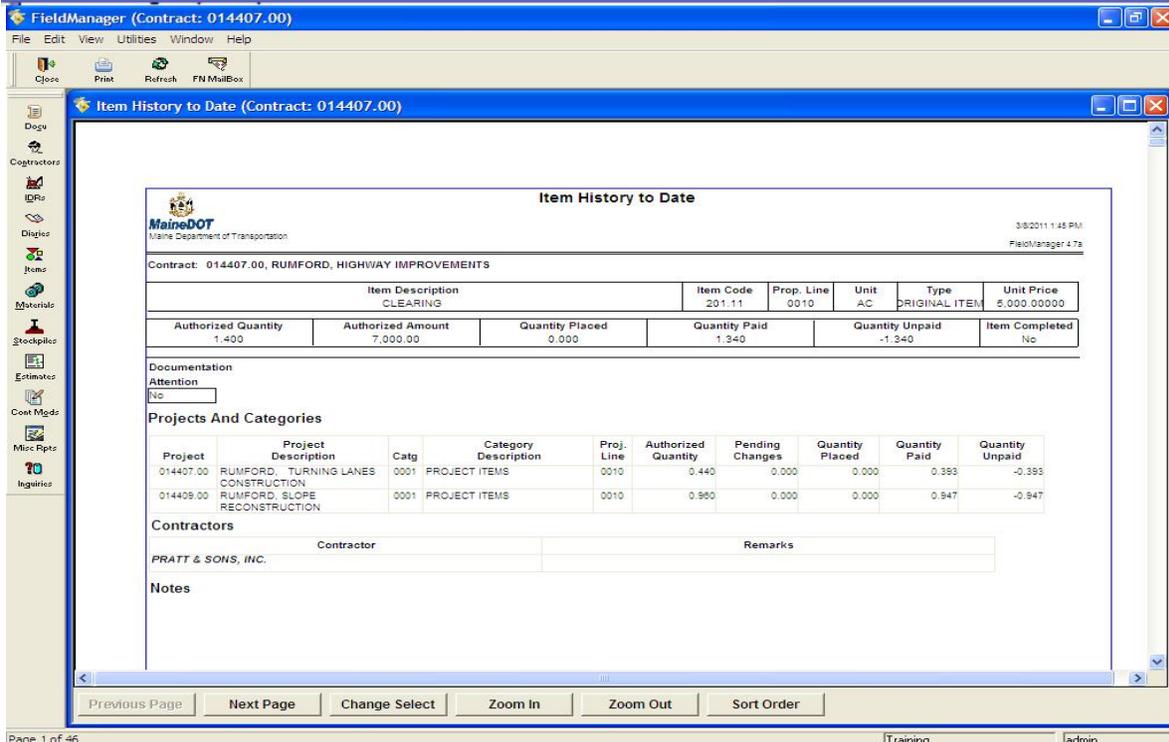
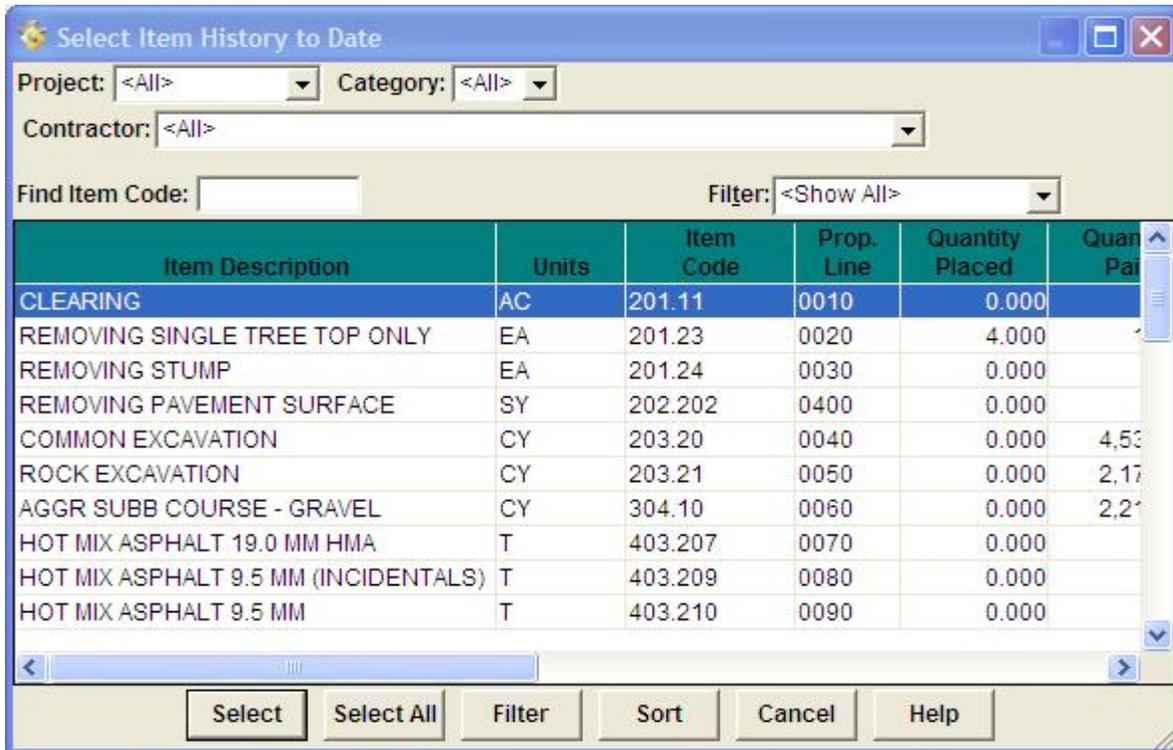
If a window associated with a contract is open, the Application Toolbar always displays an **INQUIRIES** button. Click **INQUIRIES** to display a list of inquiries to view and print for the selected contract. FieldManager software displays the Inquiries list window, and lists the contract you are viewing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



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 inquiries 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**.



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 11-1.

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 11-1 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.

**FieldManager (Contract: 00001-00001)**

File Edit View Utilities Window Help

Close Generate Cont Status SpellCheck Print Refresh

**Add Estimate (Estimate No.: 1) (Contract: 00001-00001)**

General Item Usage Vouchers View Estimate View Amt Bal View Insuff MtI

**Construction Pay Estimate Report**

AGENCY LOGO HERE  
Department of Transportation  
3/4/2004 9:39 PM  
FieldManager 3.4a

**Contract:00001-00001, I-69 RECONSTRUCTION WARNER RD TO BEARDSLEE ROAD**

Estimate Date	Estimate No.	Estimate Type	Electronic File Created	All Contract Work Completed	Construction Started Date
3/4/2004	1	Semi-Monthly	Yes		

Prime Contractor: INTERSTATE CONTRACTING COMPANY  
Managing Office: Centerville

**Pre-Voucher Summary**

Project	Voucher No.	Item Payment	Stockpile Adjustment	Dollar Amount
00001 A, I-69 RECONSTRUCTION	0001	\$29,467.50	\$3,200.00	\$32,667.50
<b>Total Estimated Payment:</b>				<b>\$32,667.50</b>

(Does not include central office adjustments)

**Item Usage Summary**

Item Description	Item Code	Prop. Line	Project	Category	Project Item Line No.	Mod. No.	Quantity	Dollar Amount
------------------	-----------	------------	---------	----------	-----------------------	----------	----------	---------------

Page 1 of 1 Previous Page Next Page Zoom In Zoom Out Sort Order

Rows 1 to 2 of 2

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.

**Pay Estimate Report Sort**

**Report Sort Order**

Item Description

Prop. Line

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.

Item Description	Units	Item Code	Prop. Line	Quantity Placed	Quantity Paid	Authorized Quantity	Pending Change
Bit Curb, Rem	m	2040C03	0125	0.000	0.000	7.000	
Erosion Control, Silt Fence NEW ITEM	m	2080C25	0085	0.000	0.000	100.000	
Mobilization, Max. _____	LS	1500C00	0080	0.000	0.000	1.000	
Slope Paving Header	m	8130C07	0075	0.000	0.000	4.000	
Slope Paving, Conc	m2	8130C03	0070	0.000	0.000	250.000	
Divider, Reinf Conc, Type 1	m2	8020C60	0065	0.000	0.000	4,500.000	
Culv,Reinf Conc Ellip,CI HE 3,1920X1220	m	4010E68	0060	250.000	250.000	300.000	
Culv, CI 6, 2100 mm	m	4010I63	0055	0.000	0.000	600.000	
Conc Pavt, Misc, Reinf, 320 mm	m2	6020I63	0050	227.000	0.000	250.000	
Bit Mixture No. 1100T, 20AA	t	5020I16	0045	0.000	0.000	7,370.000	
Bit Mixture No. 1100L, 20AA	t	5020I15	0040	1,500.000	1,250.000	3,450.000	
Bit Mixture No. 1100T, 20A	t	5020I11	0035	0.000	0.000	500.000	10
Embankment, CIP	m3	2050C10	0030	0.000	0.000	2,550.000	
Backfill, Swamp	m3	2050C01	0025	200.000	200.000	3,450.000	
Fence, Rem	m	2040C09	0020	0.000	0.000	1,200.000	
Culv, Rem	ea	2030C04	0015	0.000	0.000	19.000	
Tree, Rem, 451 to 900 mm	ea	2020C02	0010	0.000	0.000	39.000	
Clearing	m2	2010C01	0005	1,535.000	1,535.000	25,900.000	

Rows 1 to 18 of 18

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.

**FieldManager (Contract: 00001-00001)**

File Edit View Utilities Window Help

Close Save/Close Save Generate Cont Status SpellCheck Print Refresh

**Change IDR (IDR: 3/1/2004, Steve Adamson, 1) (Contract: 00001-00001)**

General Contractors Postings Attachments View

AGENCY LGO  
HERE

Inspector's Daily Report

3/4/2004 12:23 PM  
FieldManager 3.4a

Department of Transportation

**Contract: 00001-00001, I-69 RECONSTRUCTION WARNER RD TO BEARDSLEE ROAD**

IDR Date	Day of Week	Sequence No.	Import Date	Project / Resident Engineer
3/1/2004	Monday	1	N/A	David F. White
Inspector's Initials-Name		Federal Project Number		
SA Steve Adamson		STP 9776(001)		
Prime Contractor				
INTERSTATE CONTRACTING COMPANY				
Entered By	Revised By	Revision Date	Revision No.	
SA, Steve Adamson	SA, Steve Adamson	3/3/2004 9:16 PM	1	
Temperatures		Weather		
Low: 10 °C	High: 20 °C	AM Sunny PM Clouding Over		
Comments				
Contractor placing culvert 34-39 in AM. Finishing wingwalls on culvert 24-28 in PM				
Contractors				

Page 1 of 1 Previous Page Next Page Zoom In Zoom Out

Rows 1 to 8 of 8

## 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.

**Print Options**

Please choose a printing option

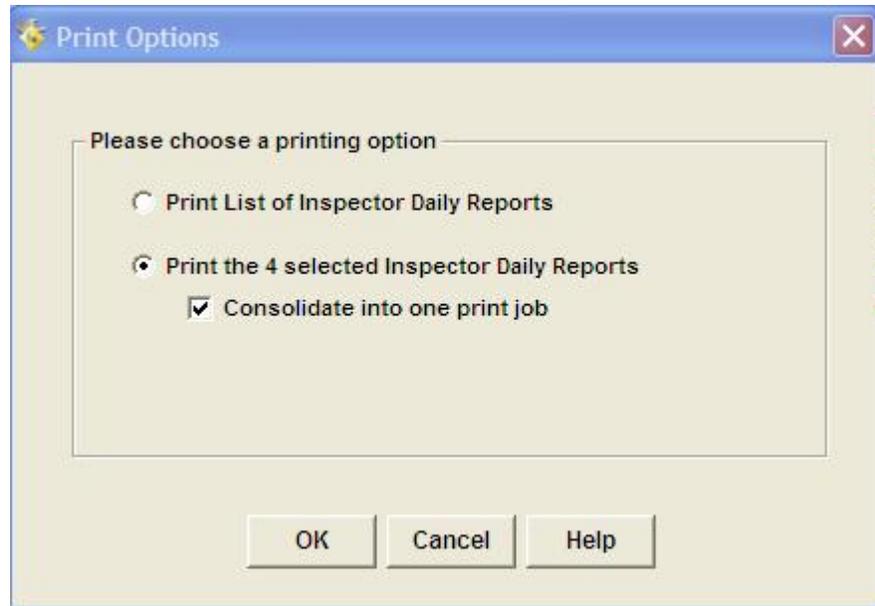
Print List of Inspector Daily Reports

Print the 4 selected Inspector Daily Reports

Consolidate into one print job

OK Cancel Help

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.





## 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.

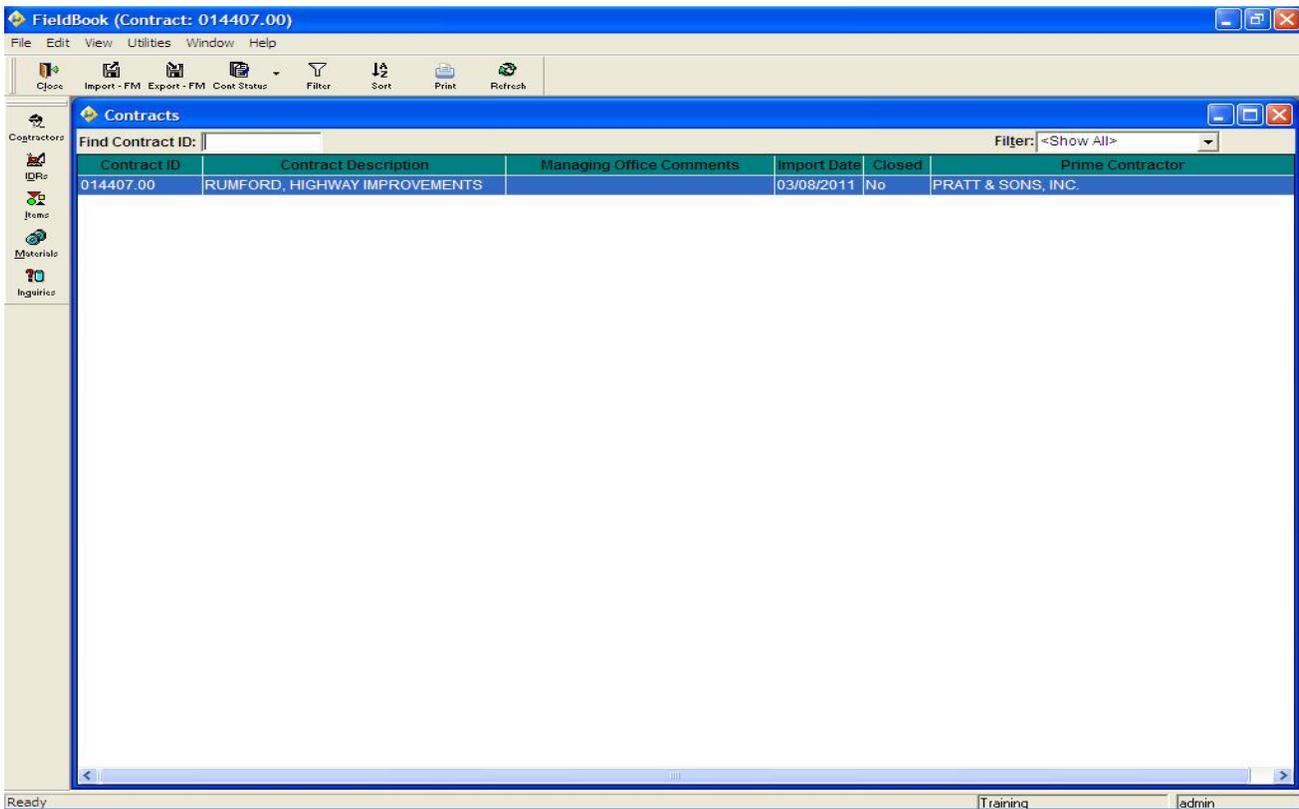
Unlike FieldManager software, FieldBook software does not have functionality in the following areas:

- . 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.



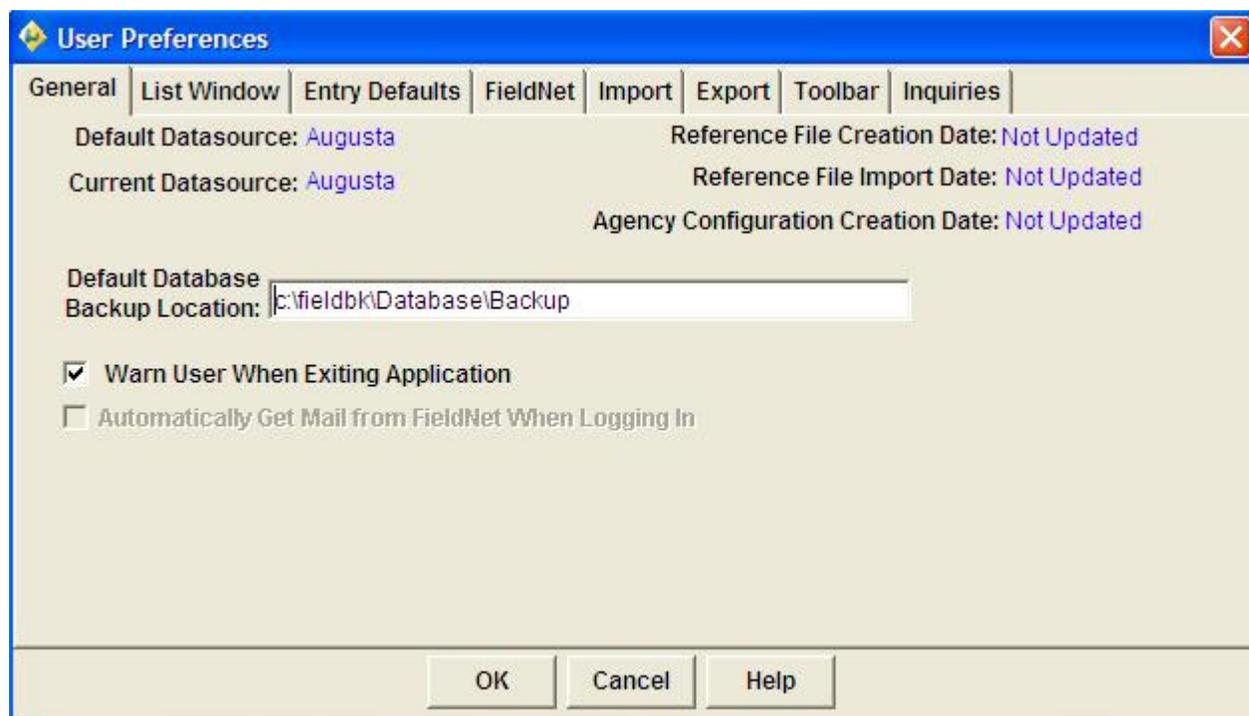
The Import Date column lists the date of the last contract refresh that was performed. This date helps to ensure that an earlier refresh is not used to overwrite a more recent one. FieldBook software will inform you if this is attempted so you can prevent the overwrite from occurring.

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

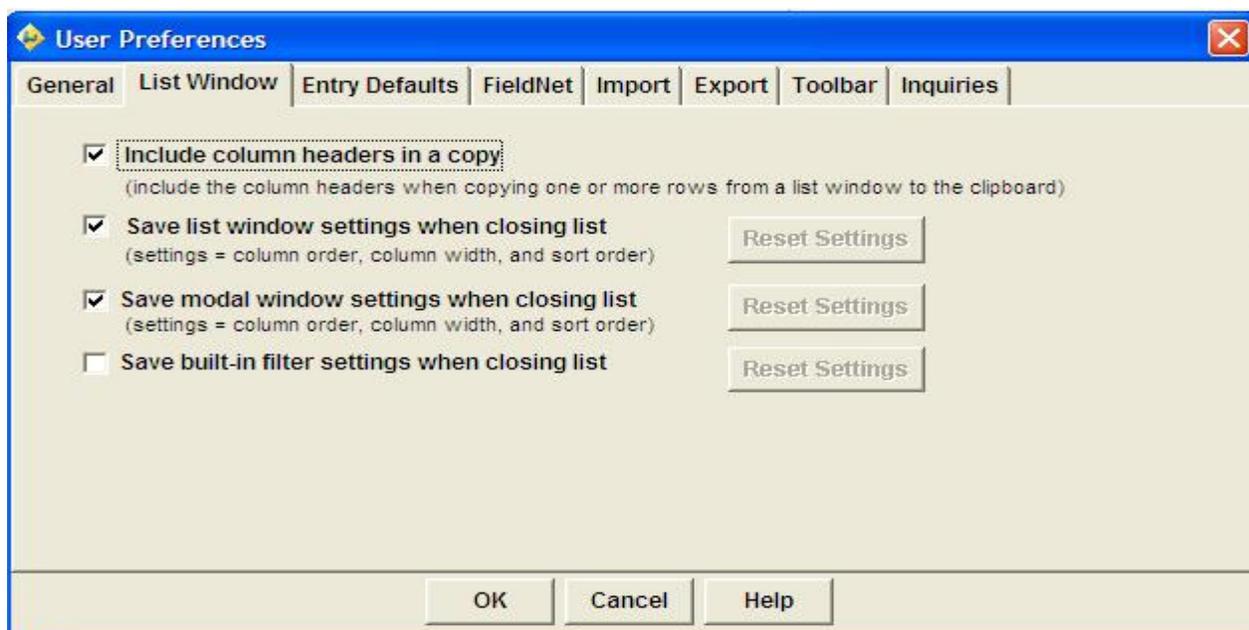
While most of FieldBook software's menu options are identical to FieldManager's, such as the Utilities menu option of changing your password, there are a few which differ. For instance, FieldBook software's Import and Export options under the File menu allow you to import a contract from FieldManager 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:



### General Tab

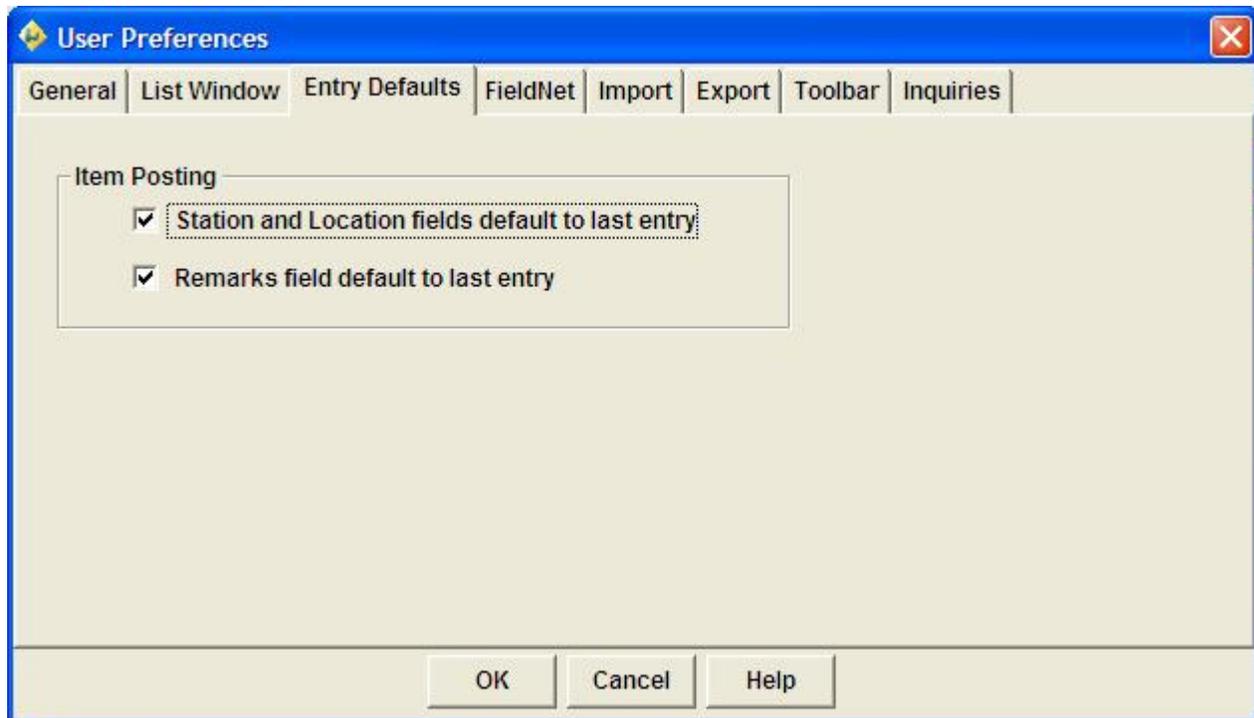
**General Tab** – If an entry is made in the Default User ID is will automatically be applied to the FieldBook logon window and not have to be entered during every login – the password will still have to be entered.



### List Window Tab

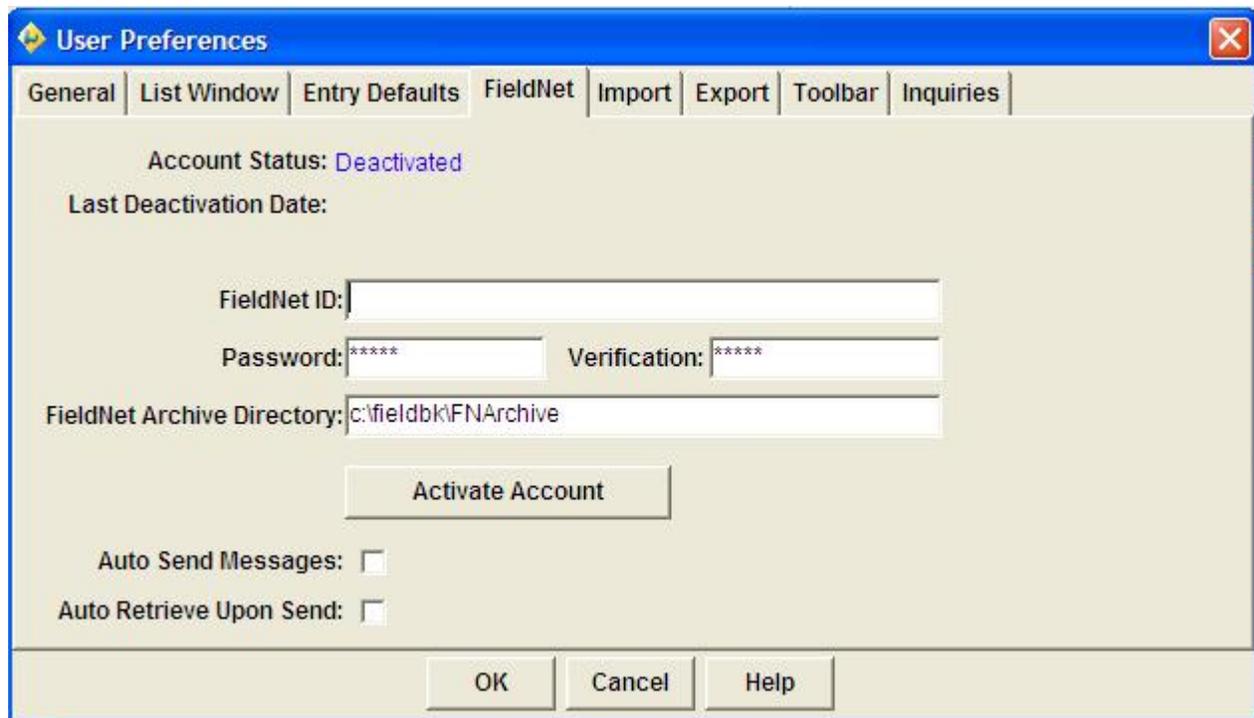
**List Window Tab** – Gives the user options on how lists will be displayed when leaving and re-

entering them.



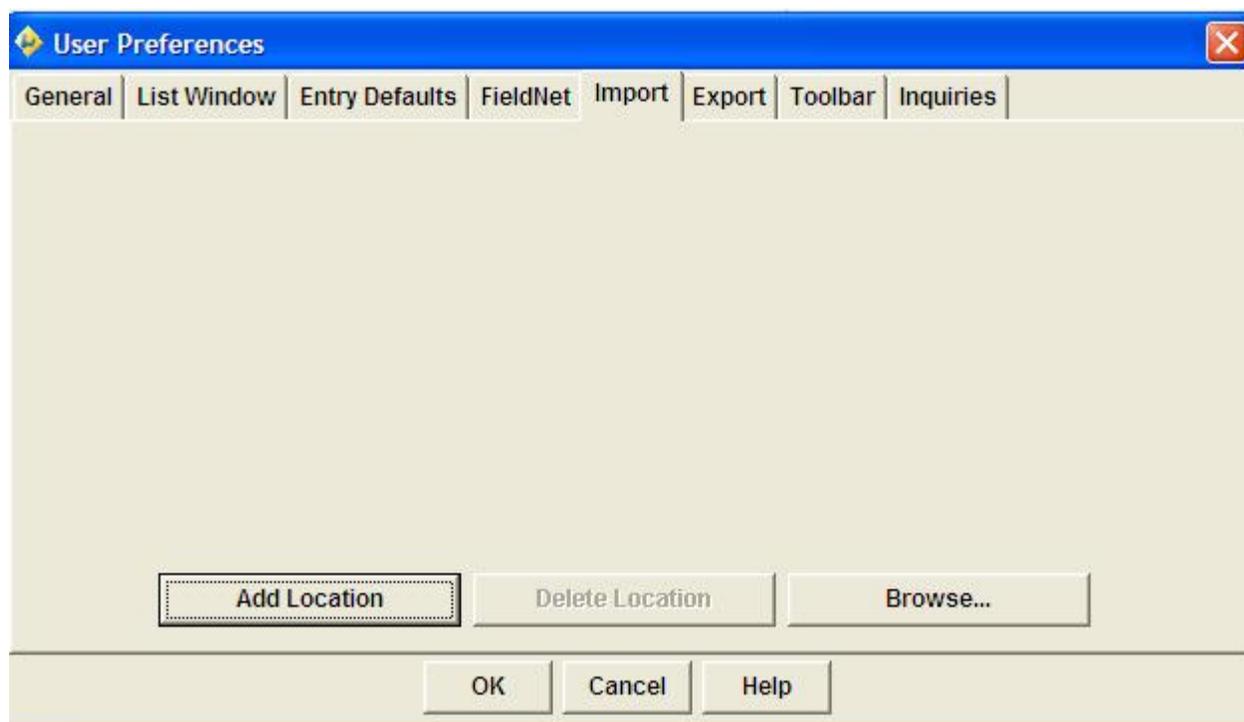
### Entry Defaults Tab

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



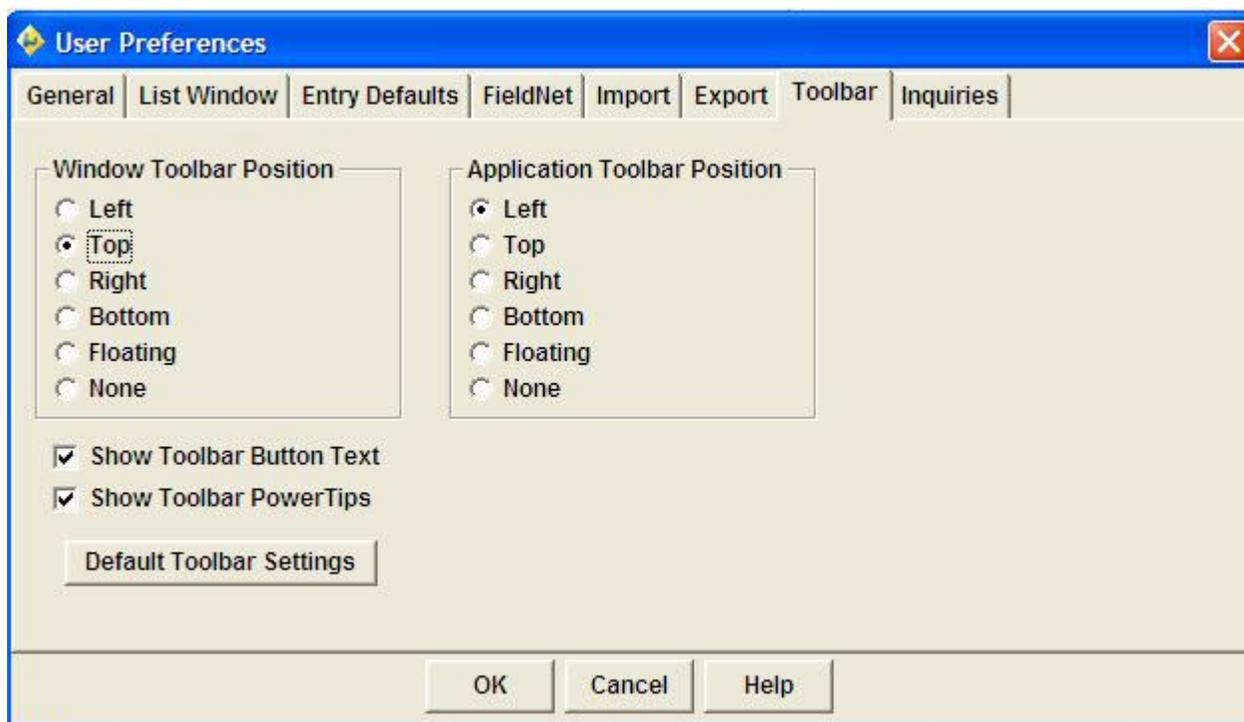
### FieldNet Tab

**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.



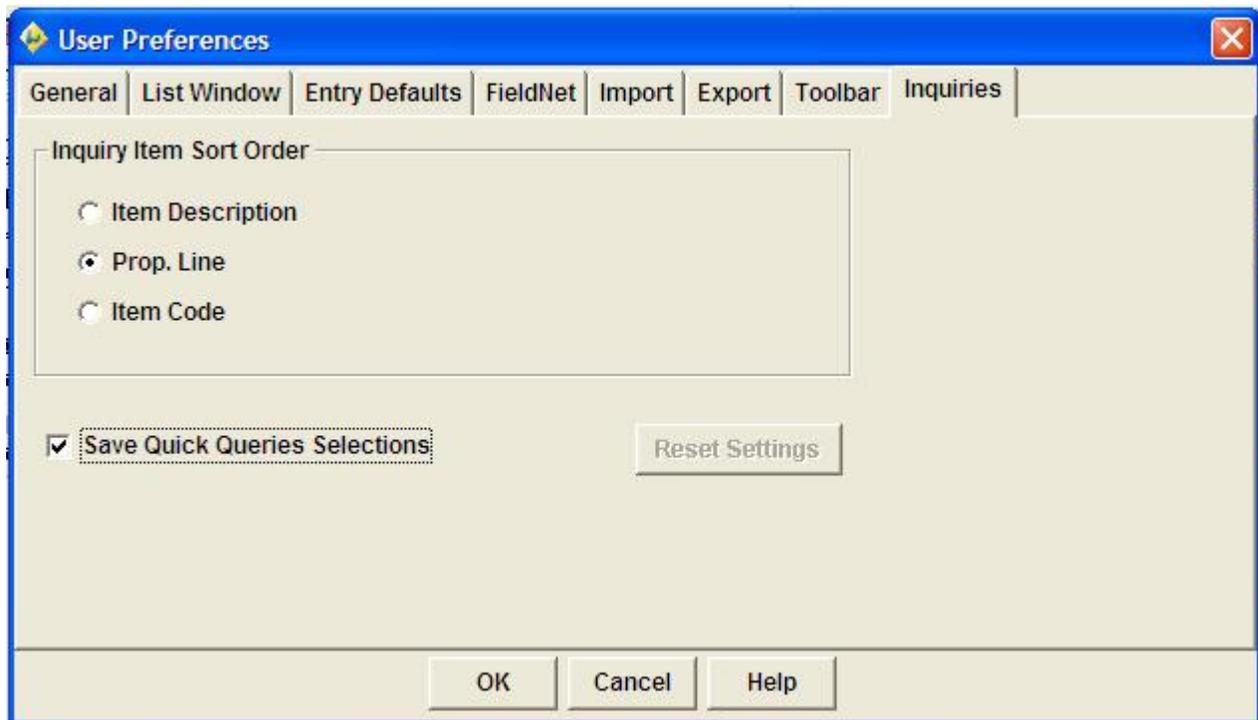
### Import / Export Tabs

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



### Toolbar Tab

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



### Inquires Tab

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

Other than FieldManager software having more information available via menu options, there are only two other menu option differences between FieldManager and FieldBook software, and both regard the Agency Master Reference Lists option found under the Utilities menu. First, in FieldBook software, the material files, forms, and sources are reached through this option, whereas in FieldManager, they are reached through a separate Utilities menu option named Maintain Material Files/Forms/Sources. This difference is because in FieldManager, the user can modify (maintain) the material files, forms, and sources, but in FieldBook software, the user can only view them. Second, FieldBook software 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.

Date	Initials	Inspector	Seq	Gen	Comments	Status
03/03/2004	CMB	Christine M Black	1	Yes	Heavy rain today - no work.	Refreshed
03/04/2004	CMB	Christine M Black	1	Yes	Heavy rain today - no work.	Refreshed
03/07/2004	CMB	Christine M Black	1	Yes	Contractor working between station 12+323 and 12+884 to control th	Refreshed
03/07/2004	RWVO	Robert W Oswald	1	Yes	Contractor clearing out lot 4-5. Tree removal starting in PM.	Refreshed
03/08/2004	SA	Steve Adamson	1	Yes	Contractor continuing to remove trees and property boundary fence.	Exported
03/10/2004	SA	Steve Adamson	1	No	Machine grading all day. Exterior boundary staking finished ahead o	New
03/11/2004	SA	Steve Adamson	1	No	Contractor finishing final clearing and grubbing - will start machine g	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 *New* 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 *Exported*. 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 IDR's to Export to FieldManager window, you can select the Include Previously Exported IDR's in List option. Selecting this displays all new and exported IDR's. When you re-export previously exported IDR's, any items, materials, item-material 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 IDR's changes to *Refreshed*. A refreshed IDR cannot be changed or deleted by any inspector. The number of days of refreshed IDR's and IDR attachments that are passed to FieldBook software is dependent upon the **View IDR's 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 IDR's, 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 IDR's 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 IDR's window.

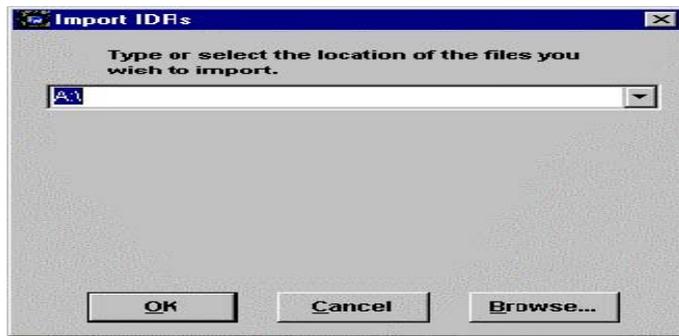


Figure 12-8

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 if 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 (Figure 12-9).

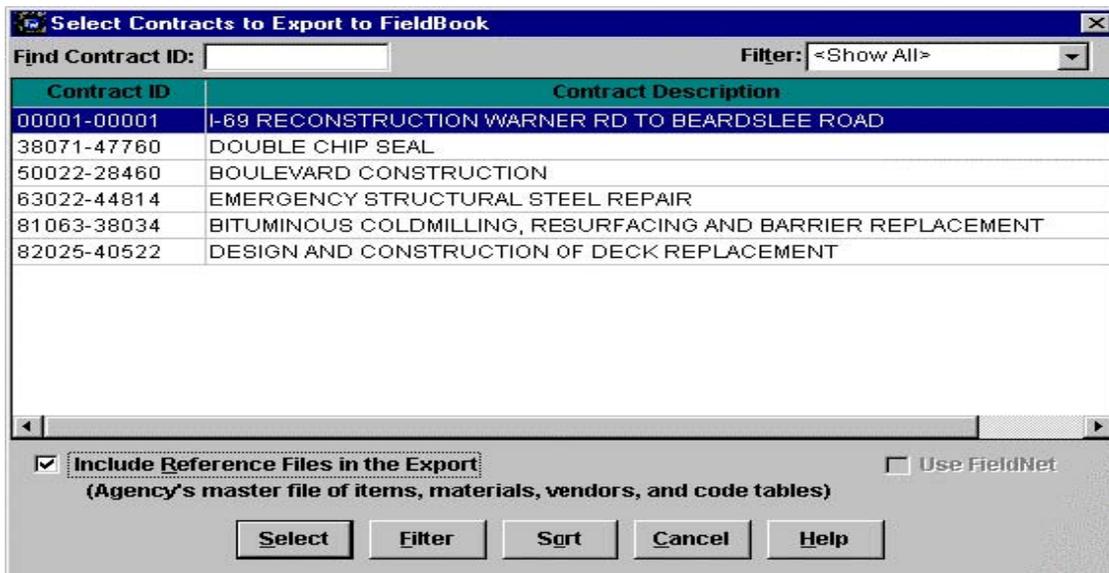


Figure 12-9

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

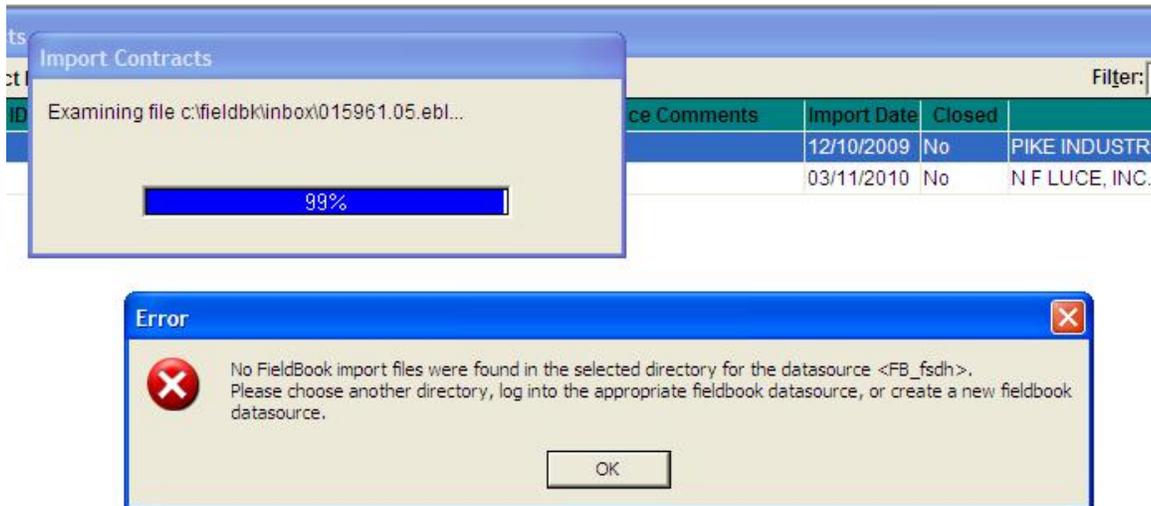
To export a reference file to **FieldBook**, choose **Export** from the File menu, and then choose **Reference Data to FieldManager/FieldBook** from the Export submenu. As shown in Figure 12-10, the Select Transfer File window displays.



Figure 12-10

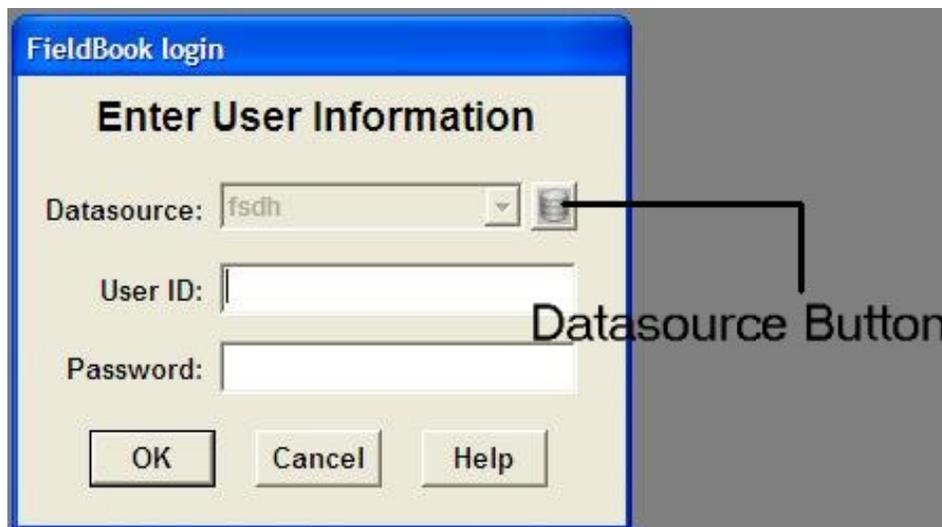
Select the location, directory, and file name for the reference file to export. Reference files are denoted by a **.ref** extension. To save the file to the specified location, click OK, or click CANCEL to cancel the export.

## 12.10 Contract Load from FieldManager to FieldBook Error

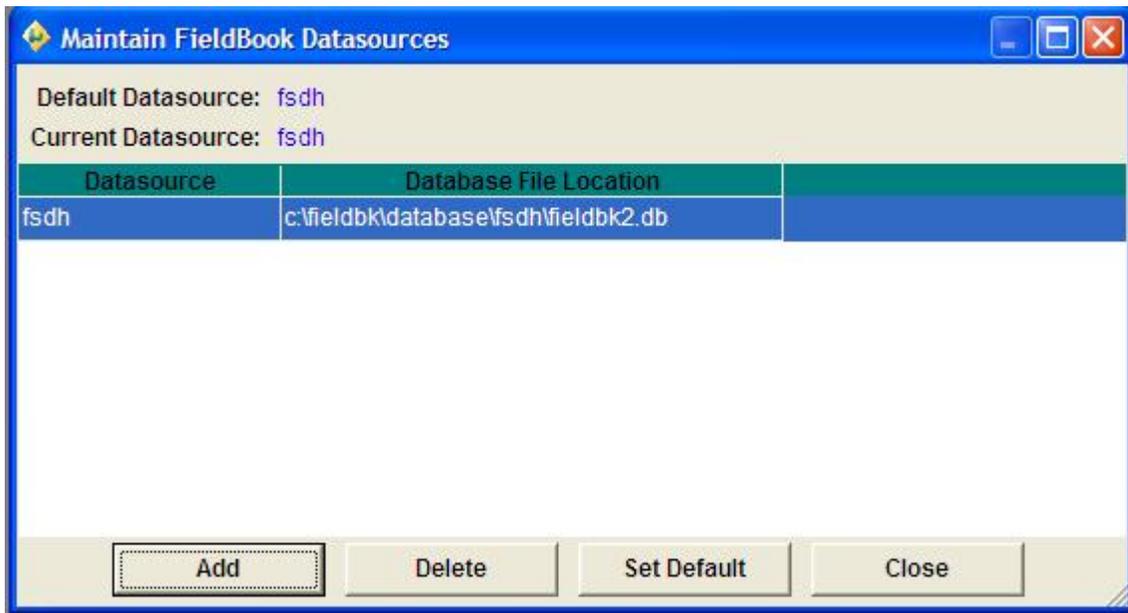


If an error message similar to the one pictured is experienced during the process of loading a contract from FieldManager into FieldBook then a new database will need to be created in FieldBook.

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.



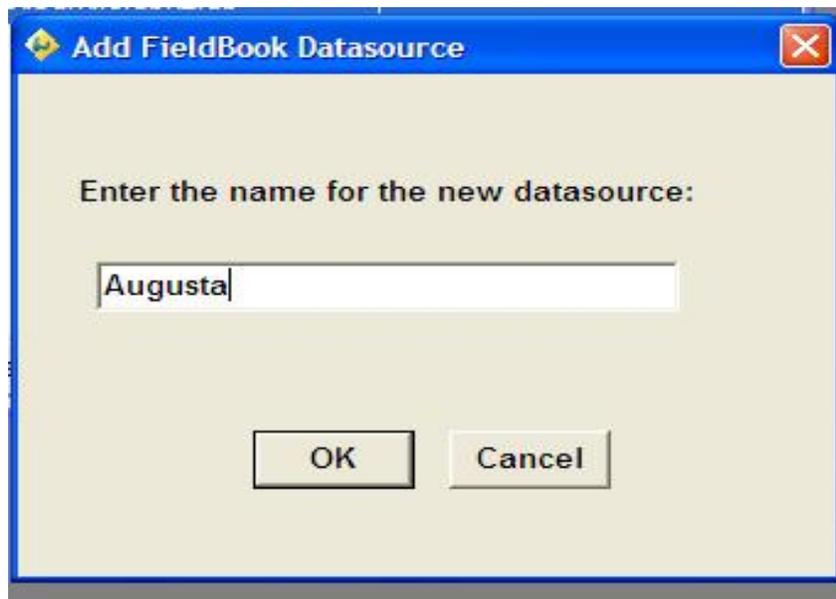
Click the **Datasource** button located at the top right of the logon screen. This will open up the Maintain FieldBook Datasources window.



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



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 AM

FieldManager 4.1a

**Contract: 012113.00, TRAINING - EASTON, PAVEMENT REHABILITATION**

<b>IDR Date</b> 4/19/2006	<b>Day of Week</b> Wednesday	<b>Sequence No.</b> 2	<b>Import Date</b> N/A	<b>Project / Resident Engineer</b> LENNY LIDBACK	
<b>Inspector's Initials-Name</b> SA Administrator			<b>Federal Project Number</b> STP-1211(300)X		
<b>Prime Contractor</b> MCGILLAN, INC.					
<b>Entered By</b> SA, Administrator		<b>Revised By</b> SA, Administrator		<b>Revision Date</b> 4/20/2006 10:08 AM	<b>Revision No.</b> 2
<b>Temperatures</b> Low: 17 ° C High: 23 ° C			<b>Weather</b> Sunny		
<b>Comments</b> 203.2001 The contractor is working on excavation At station 2+25 rt to 4+ 00 rt, the excavated area for today was at a width of 3.3m and a average depth of 0.75m. So $53.34 \times 3.3 \times 0.75 = 124.0m^3$ . all excavation went well and no rock or ledge was encountered in this area All excavated materials was hauled off site to pete's Waste site.  304.131 All excavated areas were back filled with new material hauled in from Dave's pit. The material was placed in two lifts and each lift was compacted to maximum densities with earth roller and by applying water. Please see density's in testing file this date. All grades were checked and found to be within tolerance, see grade check book page 23 for results. the amount of material used = $53.34 \times 3.3 \times 0.75 = 124.0m^3$ .					

#### 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 operator	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.Ln.	Location	Quantity	Unit	Brkdwn	ID	Attn
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:** \_\_\_\_\_  
(Signature)

 \_\_\_\_\_  
(Date)

Contract: 012113.00

IDR: 4/19/2006, SA, 2

Page 1 of 1

**Inspector's Daily Report**

MDOT

4/19/2006 1:31 PM

FieldManager 4.1a

**Contract: 012113.00, TRAINING - EASTON, PAVEMENT REHABILITATION**

<b>IDR Date</b> 4/19/2006	<b>Day of Week</b> Wednesday	<b>Sequence No.</b> 1	<b>Import Date</b> N/A	<b>Project / Resident Engineer</b> LENNY LIDBACK	
<b>Inspector's Initials-Name</b> SA Administrator			<b>Federal Project Number</b> STP-1211(300)X		
<b>Prime Contractor</b> MCGILLAN, INC.					
<b>Entered By</b> SA, Administrator		<b>Revised By</b>	<b>Revision Date</b>	<b>Revision No.</b>	
<b>Temperatures</b> Low: 15 ° C High: 26 ° C			<b>Weather</b> Sunny		
<b>Comments</b> 603.16 The contractor worked on removing and installing new driveway culverts today. They excavated the pipes in 3 locations the first one was @ station 8+25rt to 8+49 rt = 7.32m. The second @ Sta.9+12rt to 9+42rt = 9.14m. the third one was placed @ Sta. 9+54lt to 9+74lt = 9.14m. All were placed in accordance to plans. Old culverts were stockpiled @ contractors waste site on project for later disposal. All three culverts were inspected and found to be in good condition. Pipe connections were checked and were within allowable tolerance. Back filled with excavated materials and compacted in 8 inch lifts. Total pipe used today = 25.6m					

**Contractors**

Contractor's Name	Personnel	No.	Hrs.	Equipment	No.	Hrs.
MCGILLAN, INC.	excavator operator	1		dump truck	1	
	laborer	1		Rack body truck	1	
	truck driver	1		small excavator	1	

**Item Postings**

**Project: 012113.00, TRAINING - EASTON, PAVEMENT REHABILITATION**

**Category: 0001, HIGHWAY ITEMS**

Item/Material Description	Item Code	Prop.Ln.	Location	Quantity	Unit	Brkdn	ID	Attn
375 MM CULVERT PIPE OPTION I Contractor: MCGILLAN, INC. Item Remarks: 3 locations see general notes this IDR for breakdown & inspection notes	603.16	0210	3 locations	25.600	M			

**Reviewed By:** \_\_\_\_\_ (Signature) \_\_\_\_\_ (Date)



## Inspector's Daily Report

MDOT

4/19/2006 9:02 AM

FieldManager 4.1a

Contract: 012113.00, TRAINING - EASTON, PAVEMENT REHABILITATION

<b>IDR Date</b> 4/18/2006	<b>Day of Week</b> Tuesday	<b>Sequence No.</b> 3	<b>Import Date</b> N/A	<b>Project / Resident Engineer</b> LENNY LIDBACK	
<b>Inspector's Initials-Name</b> SA Administrator			<b>Federal Project Number</b> STP-1211(300)X		
<b>Prime Contractor</b> MCGILLAN, INC.					
<b>Entered By</b> SA, Administrator		<b>Revised By</b> SA, Administrator		<b>Revision Date</b> 4/19/2006 9:00 AM	<b>Revision No.</b> 4
<b>Temperatures</b> Low: 14 ° C High: 22 ° C			<b>Weather</b> Sunny		
<b>Comments</b> 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 all brush and debris was chipped and disposed of at the contractors waste site.					

## Contractors

Contractor's Name	Personnel	No.	Hrs.	Equipment	No.	Hrs.
ASPLUNDH TREE EXPERT, CO.	Aborest	1		bucket truck	1	
	laborer	2		Chipper	1	
MCGILLAN, INC.	laborer	2		Rack body truck	1	

Reviewed By: \_\_\_\_\_  
(Signature)\_\_\_\_\_  
(Date)